NORTHWESTERN UNIVERSITY

Northwestern University
IT Service Manager

Agent Manual

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1. INTRODUCTION TO IT SERVICE MANAGER

1.1 WHAT IS THE IT SERVICE MANAGER?

The primary function of the IT Service Manager system is to keep track of IT service requests, break/fix incidents or short term projects. Users can enter information into IT Service Manager, and this information is then accessible to other users. This sharing of information allows users to easily follow each other's progress, search for specific problems, and communicate with each other.

Before using the IT Service Manager, you need to become acquainted with the terminology and concepts used within the software, and in this document.

1.1.1 WORKSPACES

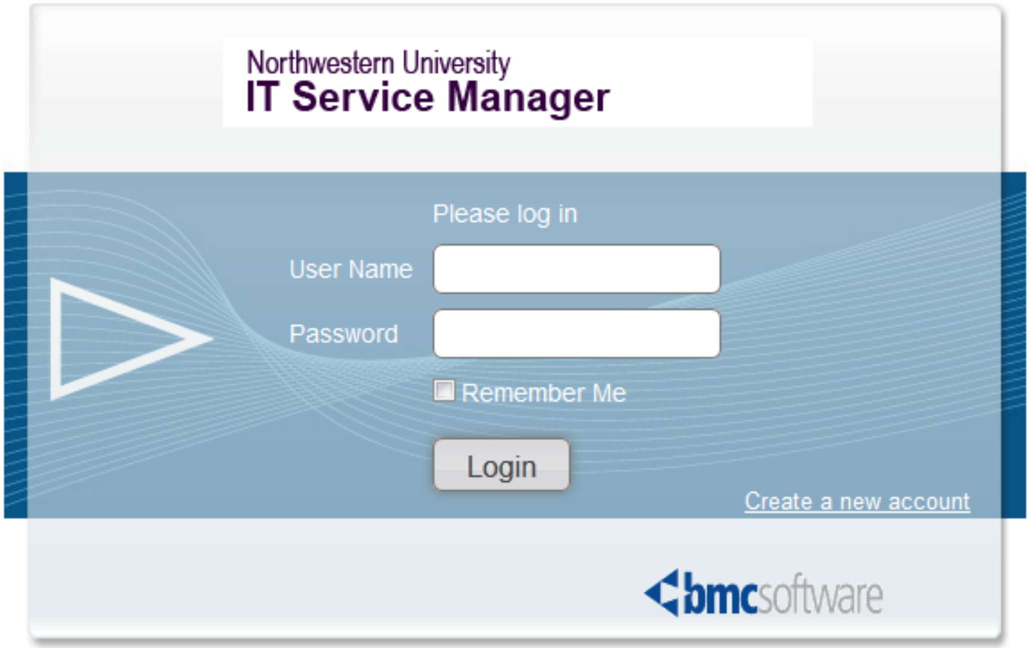
Multiple Workspaces can be created for different scenarios, such as Multiple Locations/Sites/Regions, or various other functions such as Service Desk, Change Management, Bug Tracking, etc.

- Workspaces are a composite of Issues, contacts, knowledgebase articles, preferences, and other settings and elements.
- Workspaces can operate independent of other Workspaces in IT Service Manager.
- Workspaces allow contacts to be shared across Workspaces, or created and maintained separately.
- Workspaces can each contain their own set of fields, options, and users.
- Workspaces allow for cross-Workspace functionality such as copying of issues, cross-Workspace reports and searches, and Workspace membership.
- By default, each customer will be assigned to a single Workspace.
- By default, each Agent will be assigned to a single Workspace, but could have access to multiple Workspaces depending on how their access is configured by the IT Service Manager administrator.
- NUIT had created another workspace, which contains all ticket data from the old HP Service Manager system. Access to this workspace should be provided to all existing HP Service Manager Agents.

1.2 LOGGING INTO THE SERVICE MANAGER

Access to the IT Service Manager is NetID authenticated and accessible at the following URL:

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



1.3 ISSUE OVERVIEW

An “Issue” is the default name given to an IT Service Manager record.

- Issues are the core of all IT Service Manager Workspaces.
- Issues can be categorized as Service Request, Incident or Miscellaneous.
- Issues consist of both built-in and custom fields populated by users and Agents.

1.3.1 TYPES OF ISSUES

IT Service Manager has a number of different Issue types. These Issue types will be covered in greater detail in later sections of this guide. For your reference, we include a brief description of each Issue in the table below.

Type	Description
Issues	Normally used by Agents to log a request into the IT Service Manager system. Issues can be related to break/fix requests, requests to have services performed (like a password reset), or requests for information (how-to questions).
Request	A preliminary Issue that is submitted by a customer. Agents can then “take” the Request and make it a regular Issue to work on, or it can be automatically assigned to an agent, or a referral group.
Quick Issue	Templates that contain pre-filled information for standard problems and requests.
Master Issue/Subtask	This is used when an Issue needs to be broken into separate Subtasks to be completed by different Agents or referral groups.

Global Issue/Global Link	Designates important, or frequently reported, Issues that will affect many users. Global Issues will be broadcast to Agents, displayed on the Agent Home Page, and can optionally be displayed for customers. Issues can be linked to Global Issues.
Solutions	These are the records that are used to populate the Knowledge Base.

1.4 USER TYPES AND ROLES

IT Service Manager provides tremendous flexibility for user access and permissions. This is accomplished at a high-level by defining two *user types,* and at a much lower level with definable *user roles***.**

The *user type* (IT Service Manager User or Customer User) defines the web interface users utilize to access IT Service Manager and the definition of *user roles* allows for very granular control of permissions and rights.

IT Service Manager permissions can also be managed at a much more granular level through User Roles. Roles are used to determine who can update a field value while an Issue is in a certain status, or even who can change the status of an issue.

There are 4 built-in, default roles; however, System and Workspace Administrators may create any number of custom user roles to allow different levels of access for different user functions.

1.4.1 IT SERVICE MANAGER USERS

An IT Service Manager User account is intended for named internal users, such as service desk agents, customer service representatives, or engineers. There are three default Agent types:

- **Agent**: Ability to use all basic functions of IT Service Manager, including creating/updating/completing Issues, adding address book entries, running searches and basic reports.
- **Agent Lead**: Same as above, with the ability to build, schedule, and run custom reports based on their assignment groups.
- **Workspace Administrator**: Same as above, with the ability to make administrative changes to the Workspace including adding custom fields and editing setting options.
- **System Administrator**: Same as above, with the ability to make administrative changes to all Workspaces, as well as globally.

1.4.2 CUSTOMER (CONTACT) USERS

"Contact" is default term for entries in the address book.

- All customer contact information can be stored in the address book.
- Each contact record contains information such as the contact's NetID, first name, last name, email address, phone and department.
- Issues are linked to contacts, making information about end-users available to Agents working on an issue.

A customer account is intended for end-users or external customers. This account type allows customers to submit and track their own Requests and search the Knowledge Base. There is only one default Customer Role:

- **Read/Submit/Edit**: The ability to view, create, and edit service requests. Customers can view knowledge base articles, view Global Issues, and request Laptop ER service through the Service Request section.

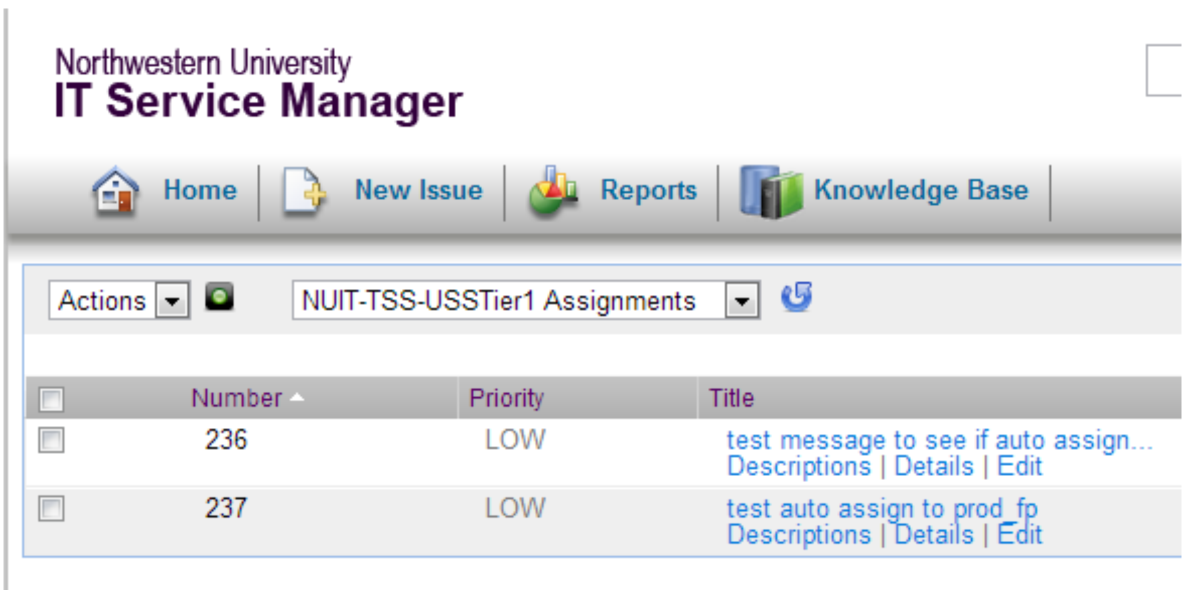
2. WORKING WITH ISSUES

2.1 OPENING AN ISSUE

When working with the IT Service Manager client, you can either create a new issue or open an existing issue.

New issues are created by clicking the **New Issue** button on the IT Service Manager toolbar. This toolbar should be visible immediately upon logging into IT Service manager.

Alternatively you may open existing issues from any given assignment view by clicking on its title, or its number.



For this chapter, we will walk through the steps on creating and resolving new issues. Please note, these instructions can also be followed to work on already existing issues.

2.1.1 EXPANDED VS. TABBED VIEWS

By default, Agents will view the Issue window in an **expanded** Issue interface style, namely, a single scrollable window. IT Service Manager also accommodates a **tabbed** Issue interface style, which allows agents to view sections of the Issue by clicking on individual tabs. All required data entry fields are marked in RED with an asterisk. Upon saving an Issue, the system will present a notification window alerting the agent to the required fields that are not completed.

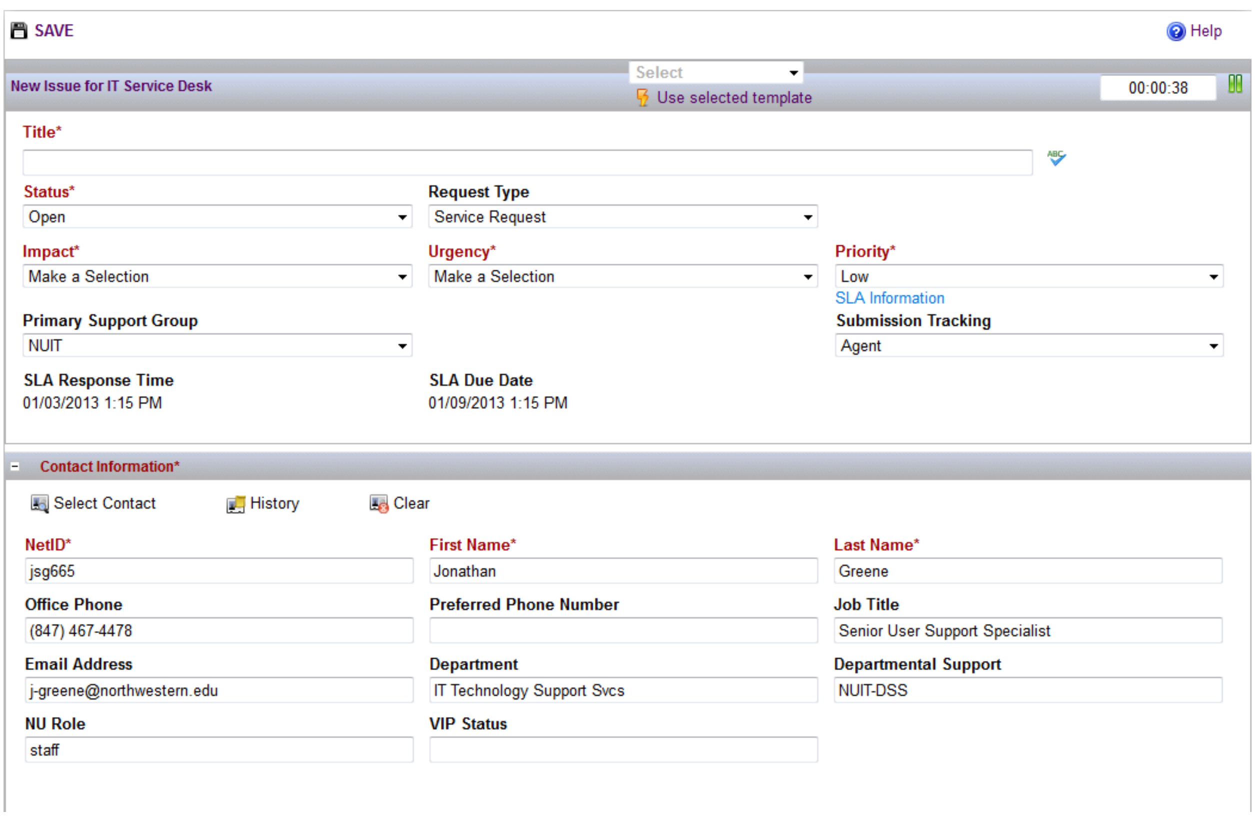
Changing Interface Styles

As an agent, you can easily switch back and forth to figure out which view best suits your working style. To switch between views:

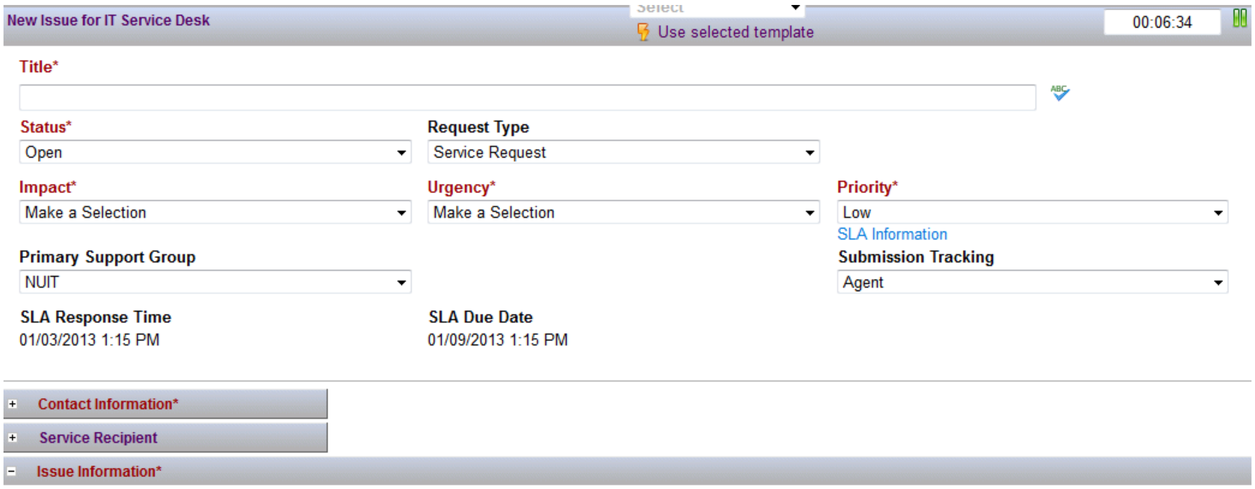
1. *Click* the **Preferences** link in the upper right hand corner of the main window
2. *Click* the **Issue Page** tab
3. *Select the* **Interface Style** radio button
4. *Enter* your **NetID password** in the Password field
5. *Click* **SAVE**

IT Service Manager will notify you that your preferences have been successfully saved, and send you back to the main screen.

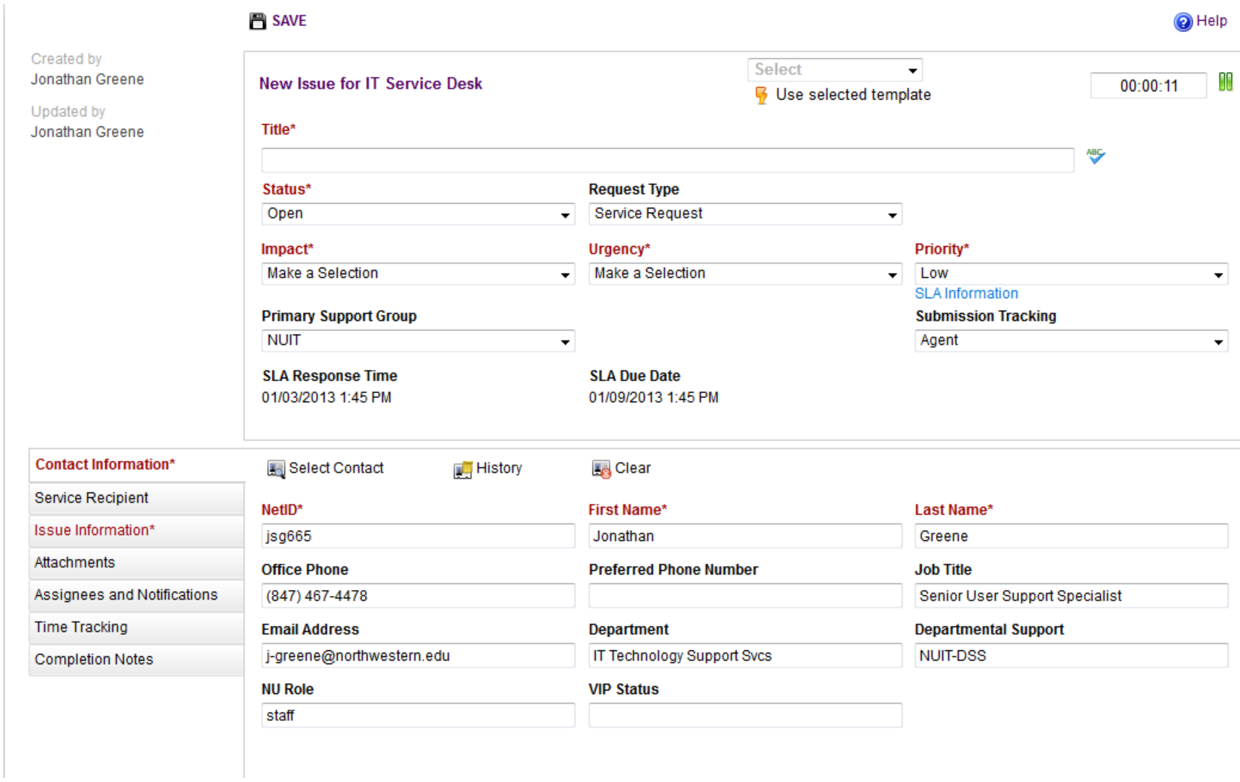
Expanded View



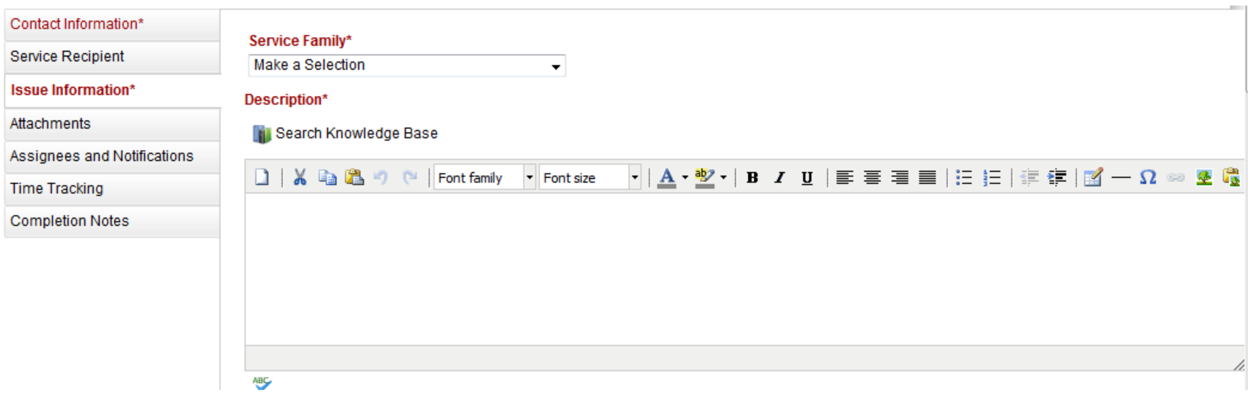
Agents can expand or collapse individual sections using the minus (-) sign in the upper left hand corner of each subsection



Tabbed View



Agents can access individual sections using tabs on the left hand side of the Issue window.

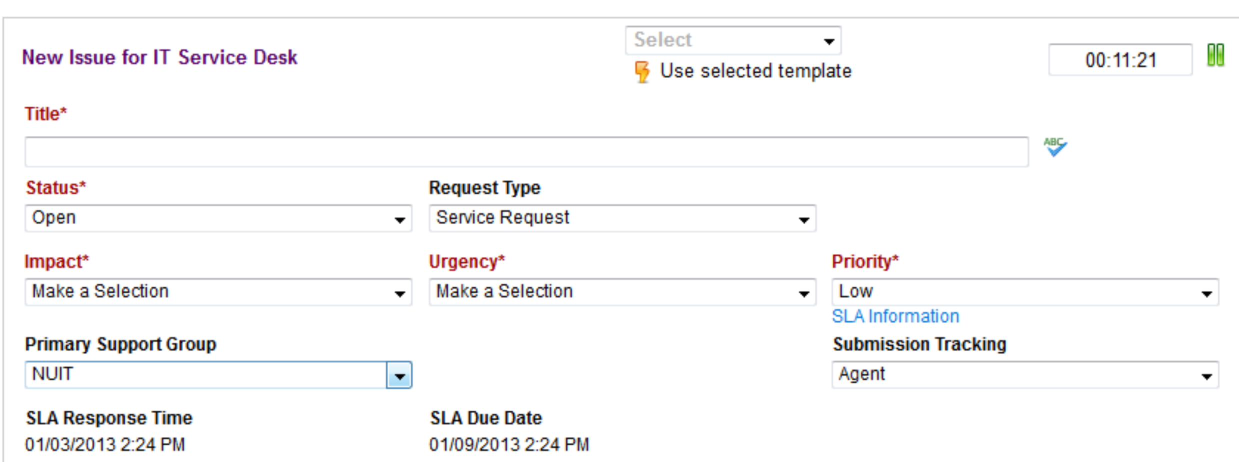


For the rest of the guide, screenshots and examples will feature the **tabbed** Issue interface style.

2.2 GENERAL INFORMATION

Upon *clicking* **New Issue**, a separate pop-up window will appear. This is referred to as the **Issue window** and divides the issue into several sections based on the type of information being captured. Depending on the preferred Issue style being used, these sections will either display as expandable/collapsible sections in the **Expanded** view or as separate tabs in **Tabbed** view.

The first section that belongs to an issue is the **General Information** section. This section, if opened in tabbed view, will always be visible regardless of which tab is selected.

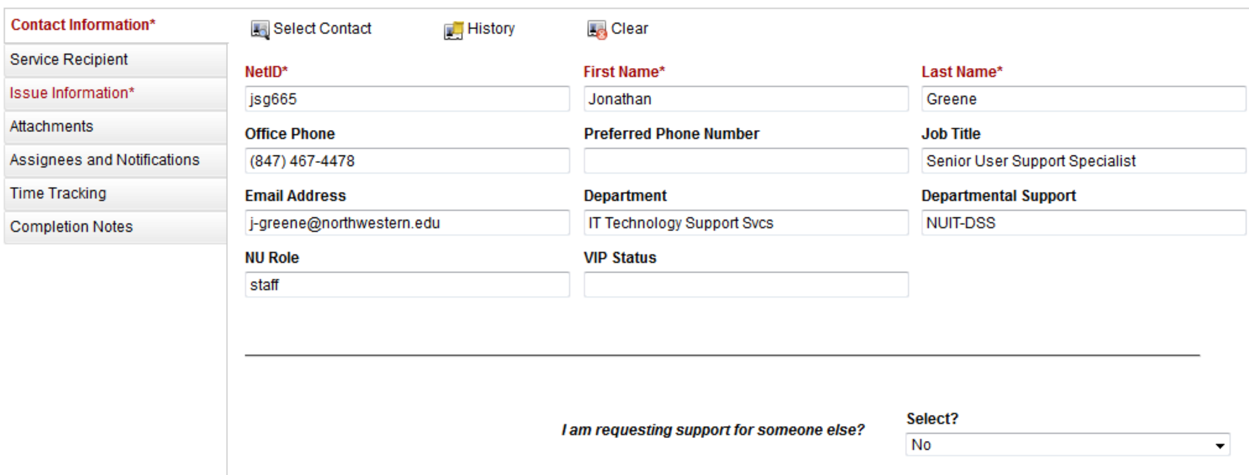


This section includes the Issue's title, status, request type, impact, urgency and priority. The default status, request type, and priority are pre-defined by NUIT, and that information is automatically populated when an Issue is created. **Agents can always adjust pre-defined fields as necessary.**

After populating the Title field, an agent can *click* the **spell check** icon ( ) to the right of the title field to spell check the field's contents.

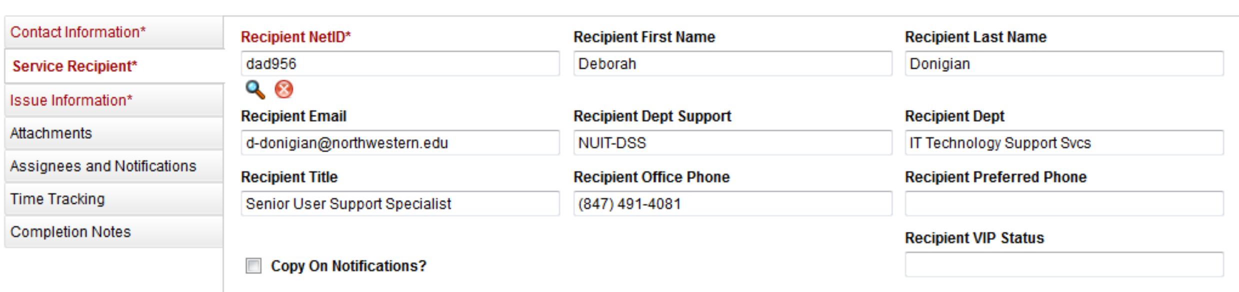
2.3 CONTACT INFORMATION

The first tab is the **Contact Information** tab. *Selecting* this tab will make the contact information window appear below the general information section.



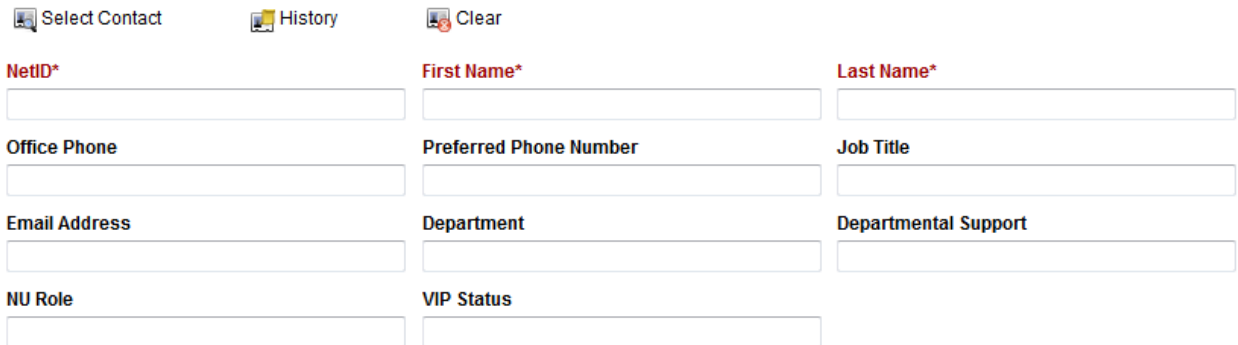
This section is where agents enter demographic information for the person requesting support. To look up information on a user, the Agent can enter a **NetID**, **First Name**, or **Last Name** into the corresponding field and *hit* **enter**. IT Service Manager will do a reverse directory lookup, and pull any available information into the Contact Information section. For all issues, the **Contact Information** tab is marked as required (red with an asterisk).

At the bottom of the screen shot (see above), you'll also see a selection box entitled "I am requesting support for someone else", with a Yes/No drop-down menu. In some situations, Agents will field calls from a secretary or program assistant, who's calling on behalf of a Dean, professor, or a university official. In cases like this, enter the secretary's contact information in the Contact Information tab, *select* **Yes** for "I am requesting support for someone else" and the **Service Recipient** tab will become required (red with an asterisk). As you can see in the screen shot below, you can then enter the NetID of the Dean, professor, or official (or contact information) into the Service Recipient tab. This allows both parties to receive Issue-based communication, and allows Northwestern to capture more accurate information on who's calling, and for what purposes.

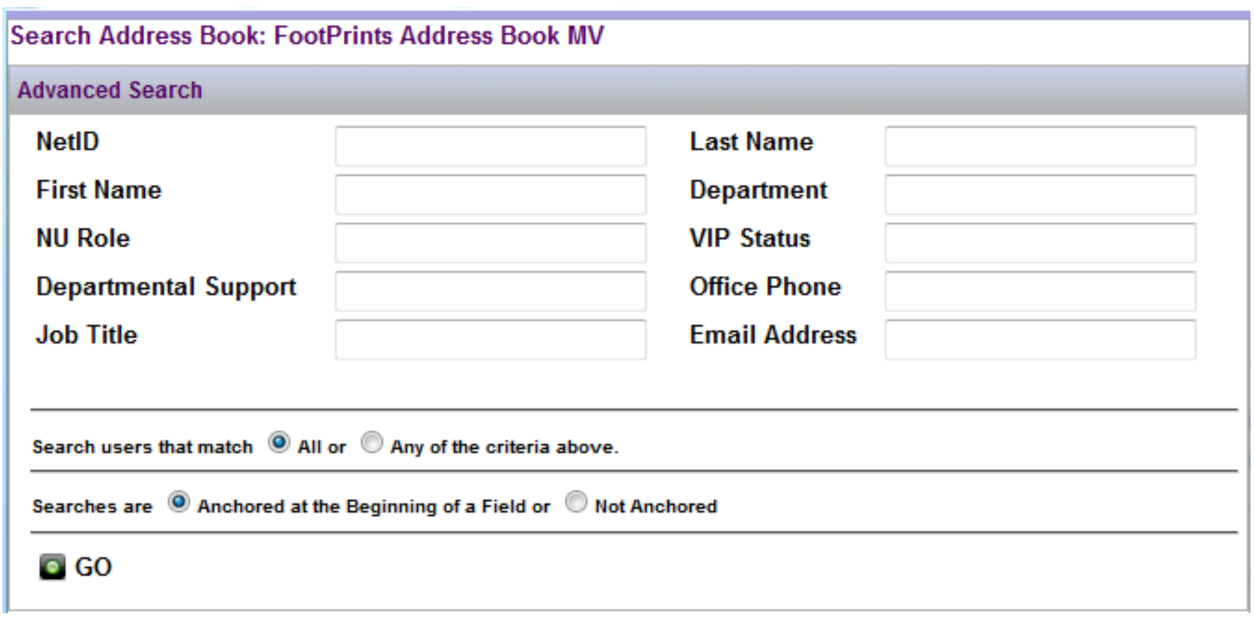


Search by Contact

Contact information of the person requesting support may also be imported from a built-in address book available in the IT Service Manager. To locate a contact in the address book, make sure you have the **Contact Information** tab selected and *click* **Select Contact** from the options near the top.



Once you *click* **Select Contact**, the following window will appear:



You can search for the contact based on any of the fields provided by the address book search. More unique fields will return more accurate results. *Click* **GO** to see the search results.

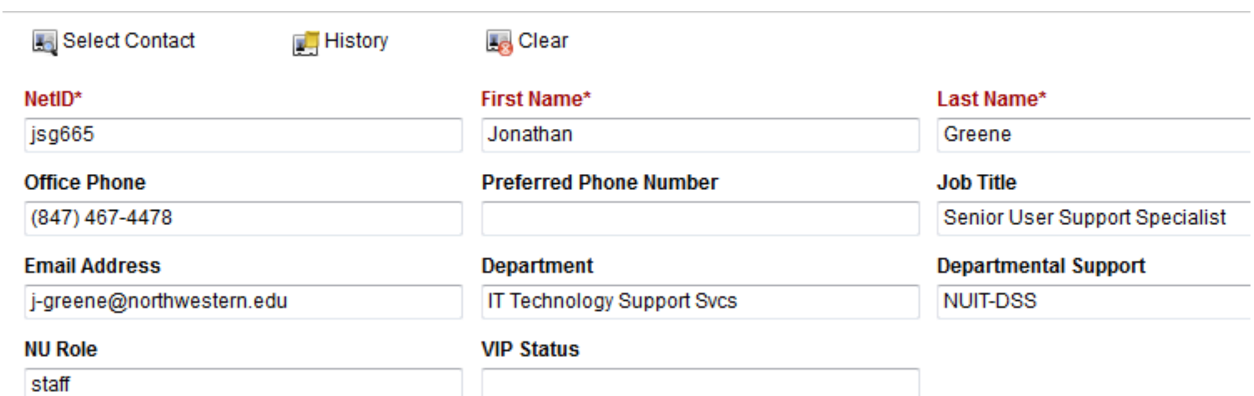
If unique data (like a NetID) is entered in fields on the **Contact Information** tab and the **Select Contact** button is clicked, the contact information from the address book will be returned. If contact information is entered that matches a contact from the Address Book, that information is automatically populated back into the Contact Information tab. If information is entered that cannot return an exact match, a list of results will populate a new window. Selecting the NetID for the user you're looking for will populate that information into the Contact Information fields.


Your search results are listed below. Click on a Contact's name to select them and automatically close this window. To perform a new search, click on the Search button. Search 1 - 14 of 14

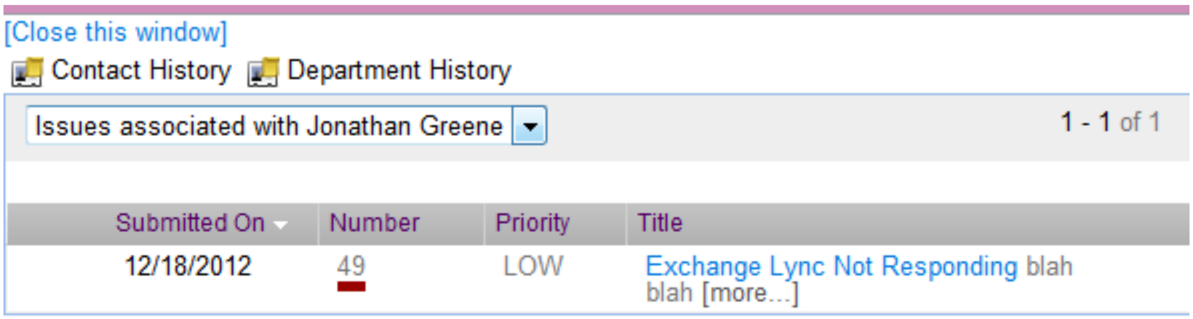
NetID	Last Name	First Name	Department
aej653	James	Arthur	
aij215	James	Austin	Music Administration
asj674	James	Andrew	
atj138	James	Alexander	WCAS Economics
bdj961	James	Brian	
cwj995	Jameson	Christina	
dcj342	James	David	
jmj304	James	Jasmine	Norris Univ Ctr Operations
kcj558	James	Kevin	Center for Comparative Medicine
klj361	James	Keisha	WCAS Art History
lmj321	James	Latoya	Office of Alumni Relations And Development
mdj870	James	Les	IT Technology Support Svcs
pja741	James	Papandrea	

Search by History

IT Service manager also gives agents the ability to easily search for the Issue history of specific contacts. Once you've populated the contact's information, *click* **History** to see a list of previous Issues reported by the user.



A list of the user's previous Issues will appear in a new window:



By default, the Issues that display are all issues that are associated with the user whose contact details are populated in the **Contact Information** tab.

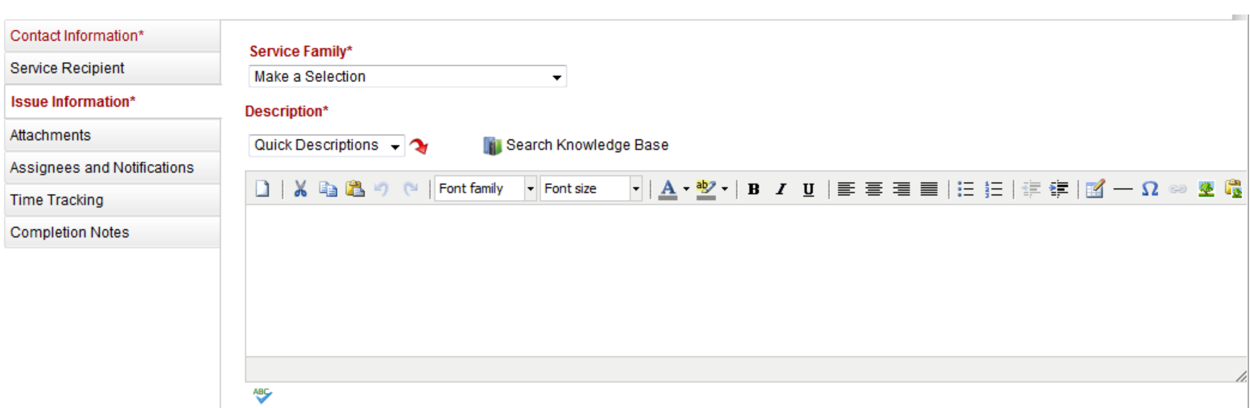
Click **Department History** to view additional issues reported by anybody in the same department as the user. You can also *click* on the Issue **Title** to open a new Issue window for the selected Issue.

2.4 ISSUE INFORMATION AND DESCRIPTION

The **Issue Information** tab is also a required field (red with an asterisk) and contains important information regarding specific details pertaining to the Issue. IT Service manager is set up with hierarchical categorization following the scheme: **Service Family -> Service -> Category**. Depending on the **Service Family** chosen, a slightly different hierarchical categorization may be used. When a **Service Family** is selected, another menu will be displayed containing corresponding subtypes.

Description

The next field down is where the full description of the Issue is entered. It can include an unlimited amount of text. This field should be used to capture the customer's description of the Issue.



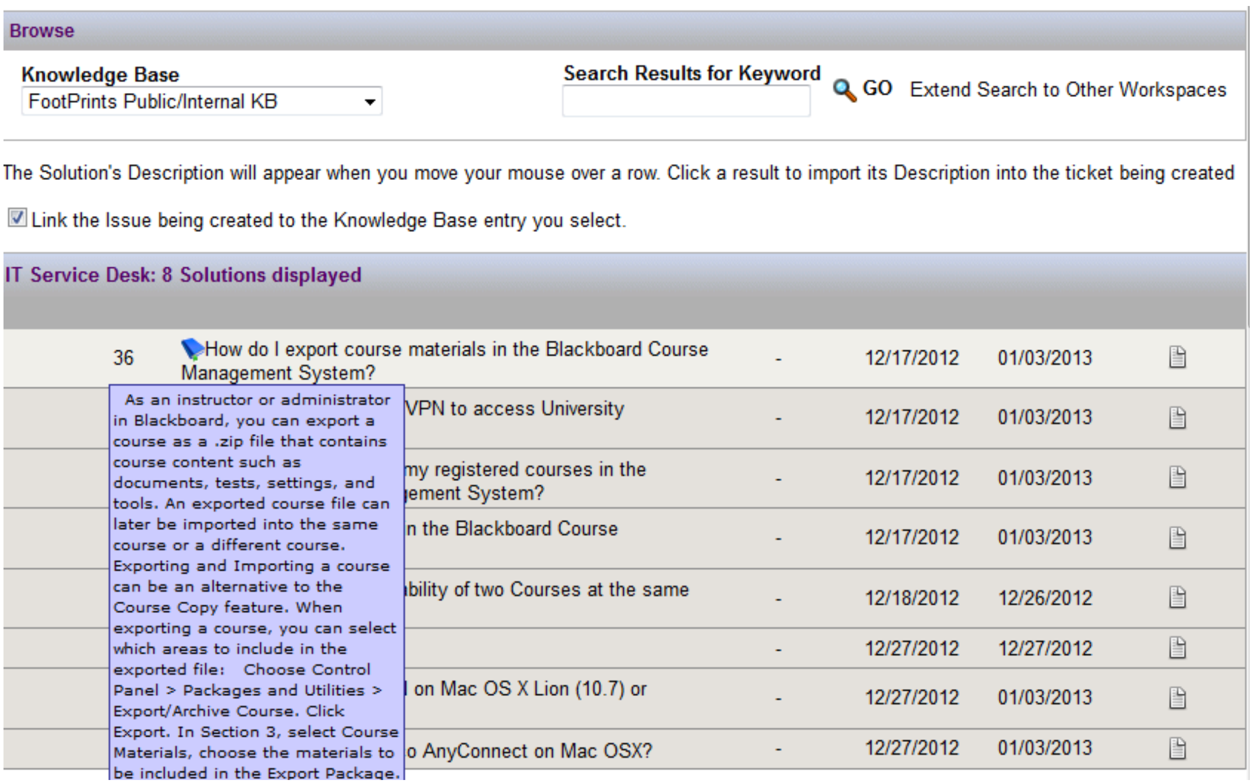
The **Description** can act as a journal, which can be appended many times. When a **Description** is edited or appended, the new information receives its own time, date, and user stamp. The description field can also contain a menu of **Quick Descriptions**. A **Quick Description** is agent-created text used to populate the description field, analogous to a pre-made template. Creation of **Quick Descriptions** will be covered later in Section 2.4.1.

- The rich text editor supports all browsers including Windows Internet Explorer, Mozilla Firefox, Apple Safari, and Google Chrome.
- The Description field can be resized using the sizing tool in the bottom right-hand corner of the control.
- Click the icon below the Description field to check spelling in the field.

Note: Each new description that is edited or appended is visible to the end user. The user will receive an email notifying them of an update to their Issue with the text of the new description included in the message body.

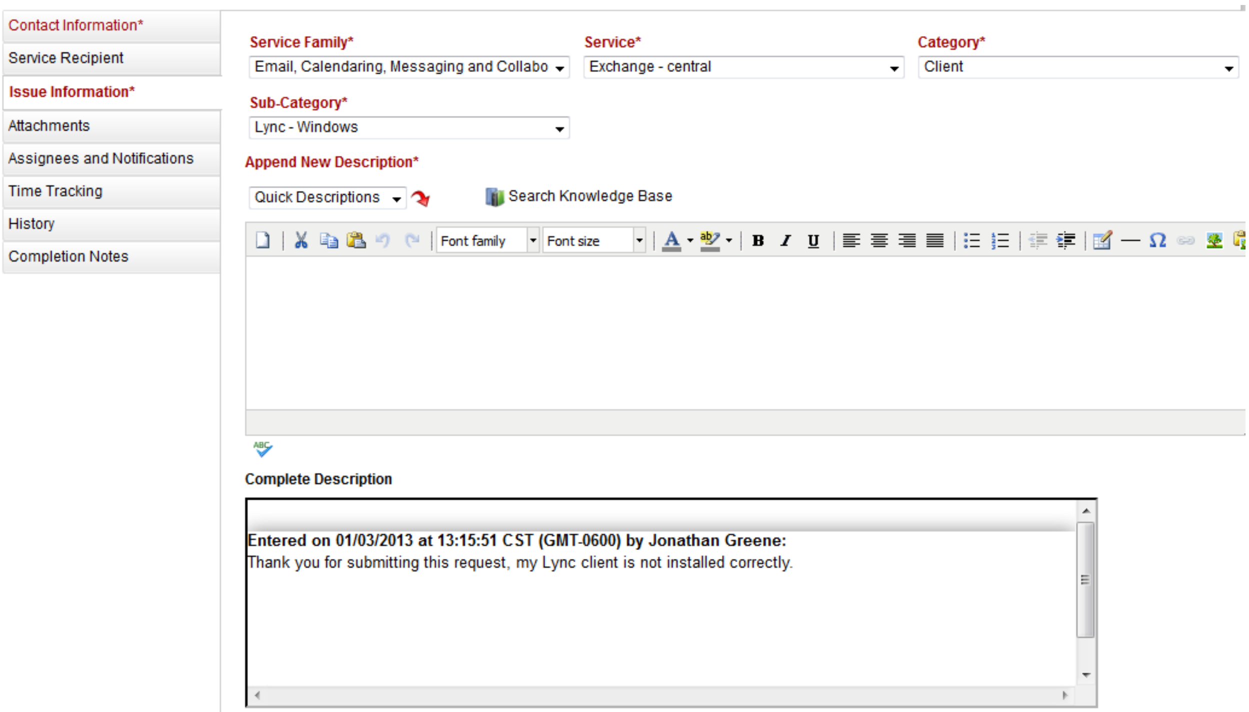
Searching the Knowledge Base

The **Knowledge Base** can quickly be searched for solutions to Issues by clicking on the Search Knowledge Base button, the following window will appear:



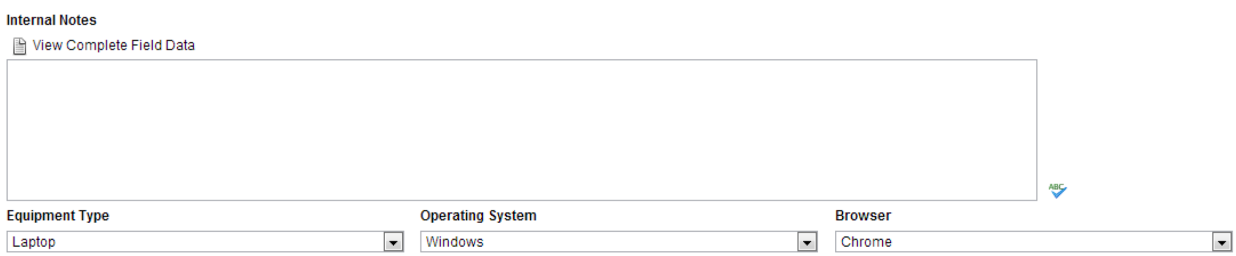
Agents can then look through the Knowledge Base for solutions to the problem the customer is reporting. If an appropriate solution is located, the Agent can choose to import the solution into the **Description** field.

When an Issue is edited, the ability to **View the Complete Description** and **Append** to the description field is provided. By enabling the checkbox for the **View Complete Description** option, the entire list of appended descriptions will be displayed below the Description box during editing.



Internal Notes

Below the description field is an additional field called **Internal Notes**. This field is for internal use only, and is where additional information may be included by agents. Additional information that may assist with troubleshooting efforts should be noted here by the agent working on the Issue.

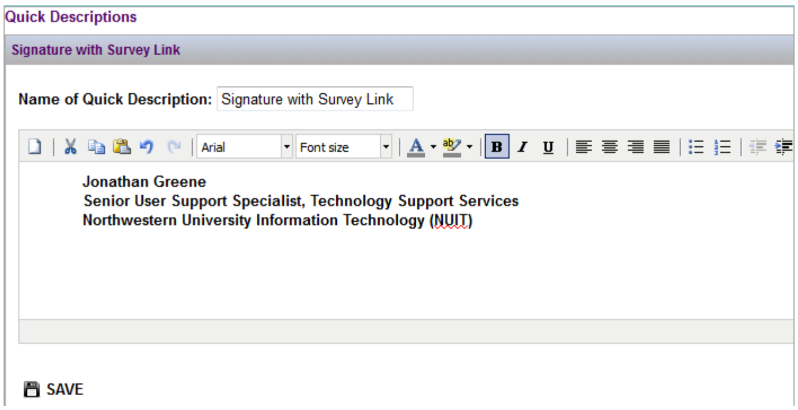


There are additional drop-down menus to indicate the **Equipment Type** (laptop, desktop, etc.)**, Operating System,** and **Browser** used by the customer. These fields are not required and may remain with the option **"No choice"** if it is not applicable to the current Issue. Any information contained in the internal notes section, along with the drop-down menus at the bottom of the **Issue Information** tab will not be visible to the user every time the Issue is updated.

2.4.1 CREATING A QUICK DESCRIPTION ENTRY

1. *Click* **Configure Quick Descriptions/Signatures** under Issue Page>Quick Descriptions/Signatures
2. *Enter* a **name** for the Quick Description
3. *Enter* **NetID password**
4. *Click* **Go**

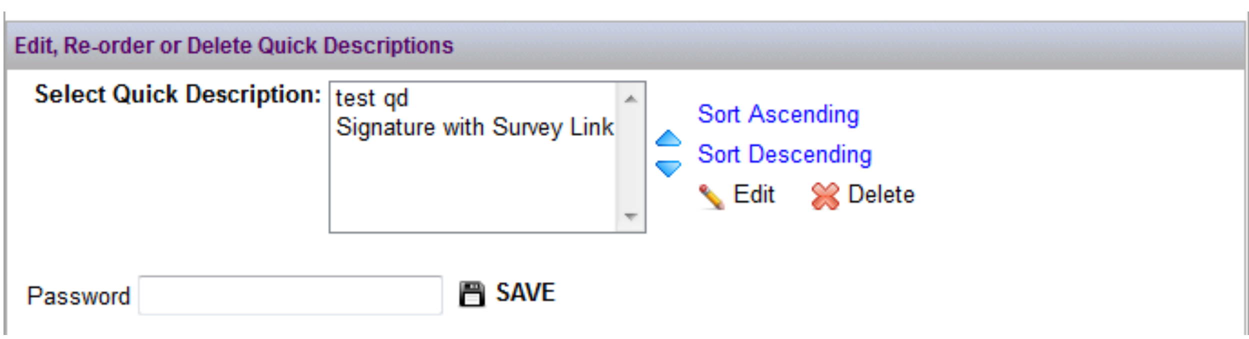
5. *Enter* the desired Quick Description **text.**



6. *Click* **Save**.

2.4.2 EDITING / RE-ORDERING / DELETING QUICK DESCRIPTIONS

1. *Click* **Configure Quick Descriptions/Signatures** under Issue Page>Quick Description/Signatures
2. *Select* the **Quick Description** to be altered
3. *Use* the **action buttons** to modify the selected quick description
4. *Enter* your **NetID password**
5. *Click* **Save**



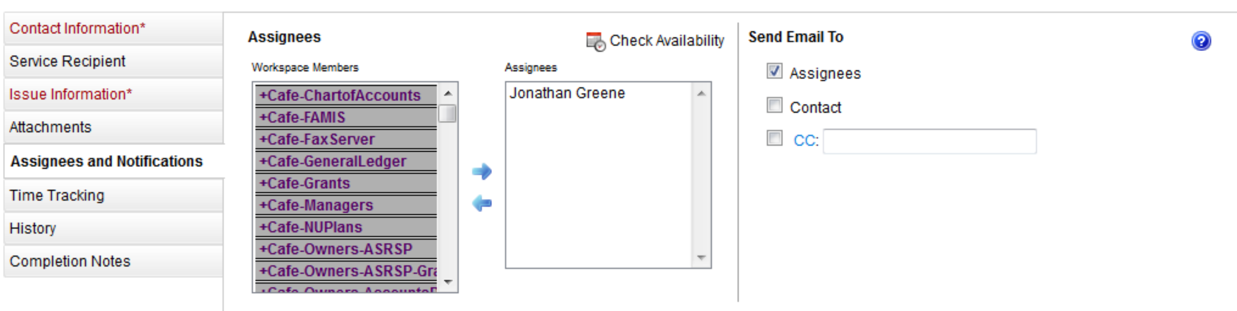
2.5 WORKING WITH ATTACHMENTS

The **Attachments** tab provides the option to include attachments with an Issue. Attachments can be supporting documentation related to the Issue, such as a screen shot of an error message, a PDF document, or an MS Excel file.

Up to **three** attachments can be uploaded at a time. When editing an Issue an agent has the ability to download, delete, or replace the attachment(s). The attachment file size limit is **25MB**. The only file extensions that cannot be attached at this time are executable (.exe), Visual Basic database files (.vbs), and database files (.db).

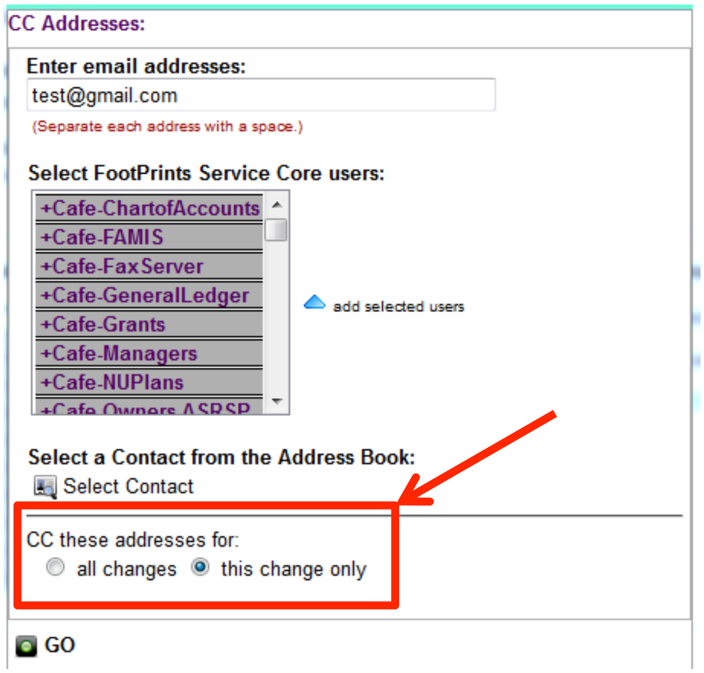
2.6 ASSIGNMENTS AND NOTIFICATIONS

The **Assignees and Notifications** tab provides options to assign Issues to one or more agents, or referral groups. ITIL best practice is to always assign issues to referral groups. Each referral group uses internal business processes to determine how tickets are assigned to individual agents. When referring tickets between groups, it is acceptable to assign a ticket to an individual if you're working directly with that individual to resolve the customer's problem.



Send Email To:
As you can see in the screen shot above, the **Assignees and Notifications** tab also allows Agents to designate other people to receive notifications about the Issue.

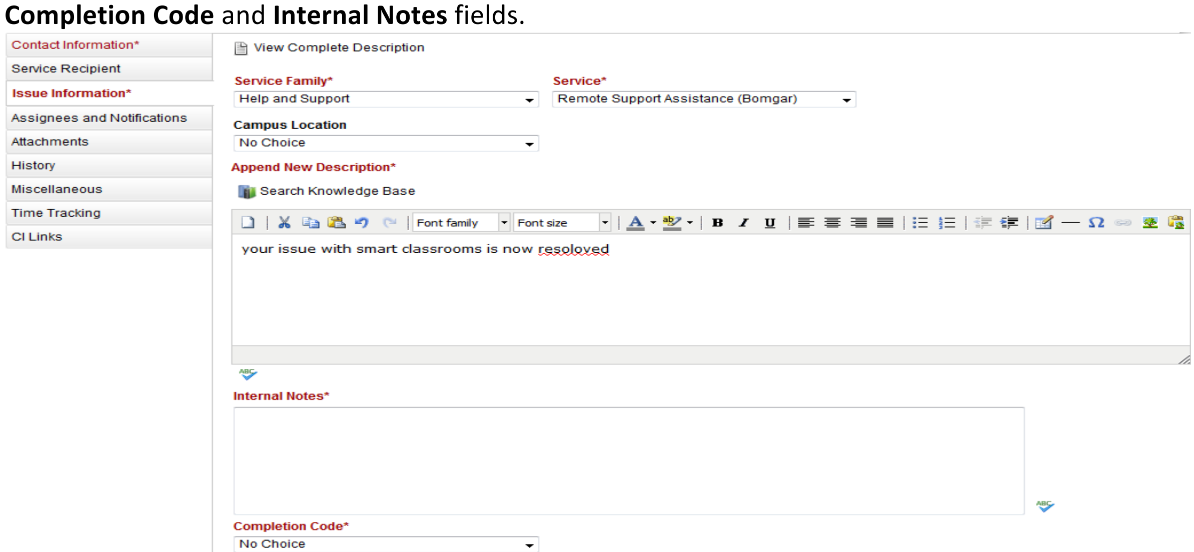
1. Assignees (default) – this notification setting means anyone listed in the **Assignees** box to the left will receive system generated notifications.
2. Contact – this notification setting should be used to send all system generated notifications to the user listed on the Contact Information tab**. (Please note: Customers will receive a pre-determined set of notifications from the system. In most cases, it is not necessary to include the contact on every system generated communication)**.
3. CC: - if a customer or agent wants to include other people in the system generated notification path, they can use the CC: field. When an Agent tries to add an email address, the following window will appear:



At the bottom of the screen shot above, there is an option that says CC these addresses for: **all changes** or **this change only**. This option allows the agent a further level of notification control. An agent can specify if the added email address will receive all future notifications on this Issue, or whether the email address will only receive a one-time notification.

2.7 COMPLETING AN ISSUE

When work on an Issue is done, the agent marks the Issue status as Completed. This change in the status will make the **Completion Code** and **Internal Notes** fields required (red with an asterisk) on the Issue Information tab. To successfully close out an Issue, the agent will need to fill out both the **Completion Code** and **Internal Notes** fields.



The **Completion Code** is used to better identify how the issue was completed. Agents should do their best to use a **Completion Code** that best describes how the Issue was completed. The **Completion Code** options are:

- **No Choice**
- **Change/Enhancement Required** – use this code to mark Issues that will require a system change or system enhancement.
- **No Reply** – use this code when the Agent has sent the end users an email requesting additional information. If after a specified amount of time, the end user has not replied to the request, the system will automatically close Issues with this status.
- **Resolved Successfully** (default) – this code should be used for most Issues.
- **Self-Resolved** – this code is to be used when a customer calls to report a problem, and while the agent is on the phone with the customer, the customer is able to resolve the issue without agent intervention. This code could also be used when a customer responds to an open issue, to report it has resolved itself.
- **Unresolvable** – this code is used when there is no successful resolution of an Issue.
- **Unsupported** – this code is used when an Issue is opened for something that is not supported. An example would be a printer, because NUIT does not support printers.

The **Internal Notes** field gives agents additional space to make notes on how an Issue was completed. This information could be valuable to another agent researching that same Issue for another customer.

2.8 SAVING ISSUES

Once the agent has entered all the relevant information in the Issue, the issue must be saved for all the changes to be recorded.

To save an issue, an agent must click on the **SAVE** button on the issue page. It is important to remember that when saving an Issue, the internal notes field must also be updated. Attempting to save an Issue with a blank internal notes field will prompt the agent to update the internal notes field via a system popup.

3. ADVANCED FEATURES

3.1 USER PREFERENCES

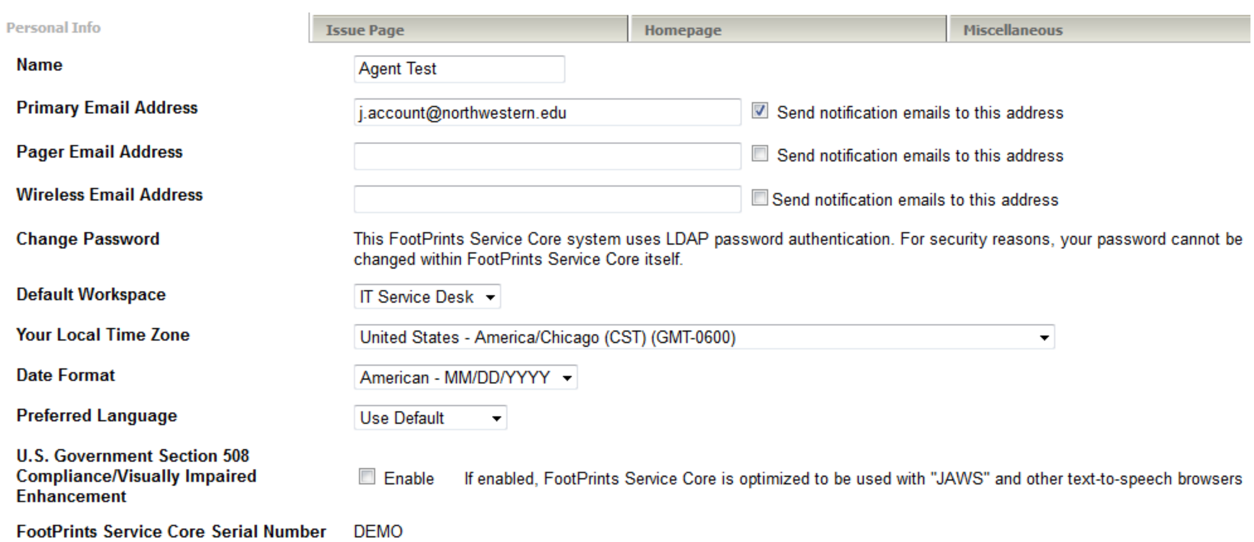
3.1.1 ACCESSING YOUR PREFERENCES

To configure preferences, *Click* **Preferences** located in the upper-right corner of the page banner, as shown below.

Once any changes are made, *Enter* your **NetID Password** and *Click* **Save** on the password field located at the top left of the preferences page, as shown below.

Note: Many preference modifications require a refresh of the viewing window. If one of the options requires a refresh, an alert to the issue will be displayed.

3.1.2 PERSONAL INFO TAB



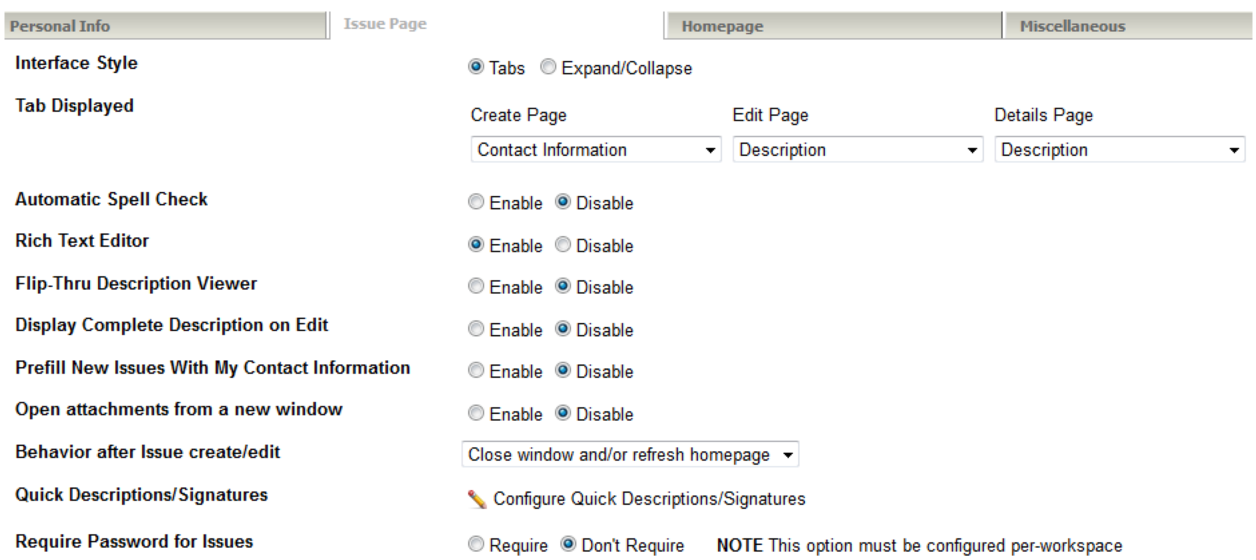
The **Personal Info Tab** provides the following options:

- **Name**: The Agent name which will be displayed throughout the system.
- **Primary Email Address**: System generated email notifications are sent to this address.
- **Pager Email Address**: System generated pager notifications are sent to this address.
- **Wireless Email Address**: System generated wireless notifications are sent to this address.
- **Change Password:** Since Northwestern is using NetID authentication to login to IT Service Manager, Agents cannot change their passwords in the system.

- **Default Workspace**: Provides an agent the ability to choose the Workspace that is displayed at login by default. For most Agents, there will only be one Workspace available.
- **Your Local Time Zone**: By default, IT Service Manager displays all dates and time in the time zone of the IT Service Manager server (currently set to Central Standard Time). In the event a different time zone is selected, all dates and times are adjusted to reflect the selection.
- **Date Format**: Use this option to change the format of the date display (Optional).
- **Preferred Language**: Use this option to change the language used throughout the application.
- **U.S. Government Section 508 Compliance/Visually Impaired Enhancement**: Use this option to provide the visually impaired with a user interface that is easier to read. If enabled, IT Service Manager is optimized for use on "JAWS" and similar browsers.
- **IT Service Manager Serial Number:** This is the application serial number.

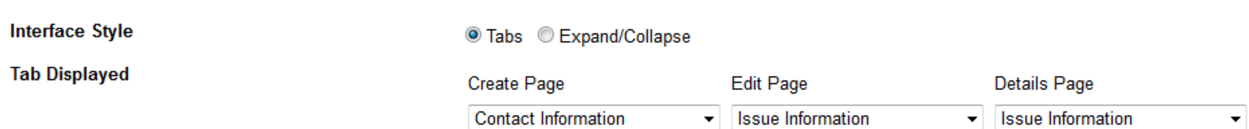
3.1.3 ISSUE PAGE TAB

The Issue Page, shown below, provides options to specify how Issues are displayed. Each Agent can configure the various options for preferences which allows for custom workflow analysis. These options bring the work directly to the Agent, providing an efficient workflow.

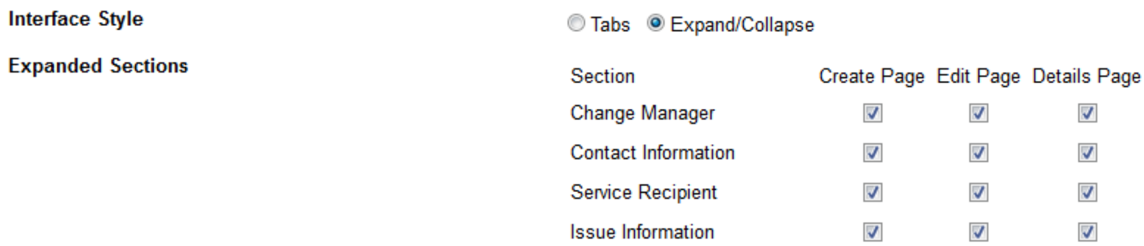


The **Issue Page Tab** provides the following options:

- **Interface Style**: Agents can choose between a tabbed or expand/collapse interface style.
    - When the **Tabs** interface style is selected, the sequence for display of the first three tabs can be configured, as shown below.



- When the **Expand/Collapse interface style** is selected, Agents can specify the sections displayed in expanded mode for each of the three page types. Use the check boxes to indicate that a section will be displayed in expanded form, as shown below.

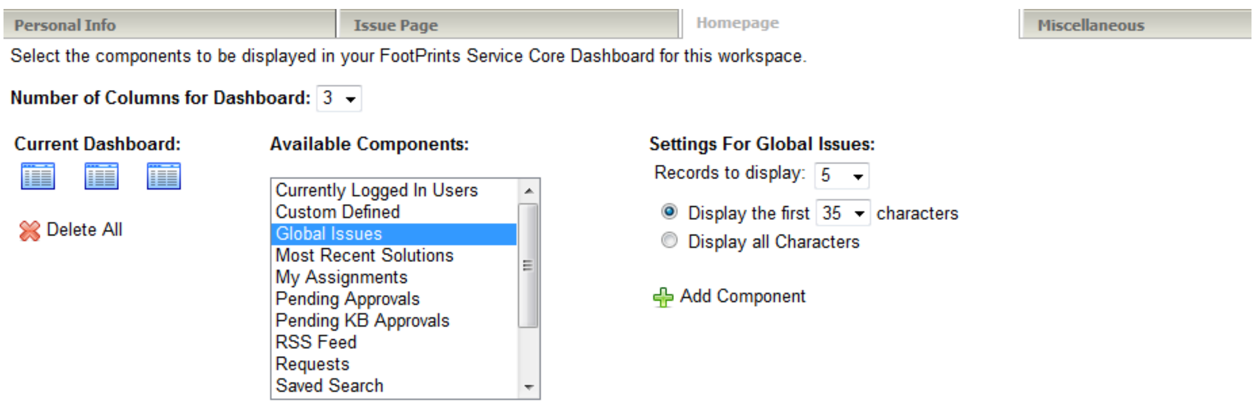


- **Automatic Spell Check:** Use this option to enable automatic spell checking. The spelling verification will occur after a submission or update. A pop-up window will present the spell checker results.
- **Rich Text Editor**: Use this option to enable the WYSIWYG text editor in the Description field. The WYSIWYG editor allows you to control text formatting such as font, size, color, bulleted lists, numbered lists, and tables.
- **Flip-Thru Description Viewer**: If enabled, only one description is displayed in the Issue Description field. Use the arrow buttons to advance through multiple descriptions. An additional control above the Description field provides the ability to display all descriptions at once in a new window.
- **Display Complete Description on Edit**: If enabled, a non-editable display field is included before the description field. This allows an Agent to scroll through previously filed descriptions without opening a separate View Current Description window.
- **Prefill New Issues with My Contact Information**: If enabled, when a new Issue is created, the contact information section is pre–populated with the Agents demographic information.
- **Open Attachments from a New Window:** If enabled, a new window is opened when file attachments are included to download.
- **Behavior After Issue Create/Edit**: Use this option to change how the system reacts after an Issue is created or edited. The options are:
    - Close window and/or Refresh Home Page
    - Display Issue Details
    - Display Confirmation Page Only
- **Quick Descriptions/Signatures:** Agents can use this option to provide quick access to common answers, or to create a personal signature. To use a Quick Description with an Issue open, select the name for the Quick Description in the WYSIWYG editor. Quick Descriptions created in the Issues Page tab are listed under "Personal," and can only be used by the agent who created them.
- **Require Password for Issues:** Use this option to restrict others from being able to update Issues that are assigned to you (for example, if an Agent is away from their desk) by requiring a password. If the password entered is the same as the Agent's login password. If this feature is enabled, a **Password** field is displayed next to the **Save** button.

3.1.4 HOME PAGE TAB

The Home Page Tab specifies the components that appear on an Agents Home Page. Agents can specify how many columns populate in their dashboard section of the Home Page. The Dashboard is meant to provide At-A-Glance modules which can provide Agents with additional information on Issues, Global Issue, and other items. Agents can also build custom components for display on the Home Page.

CONFIGURING THE HOME PAGE DASHBOARD



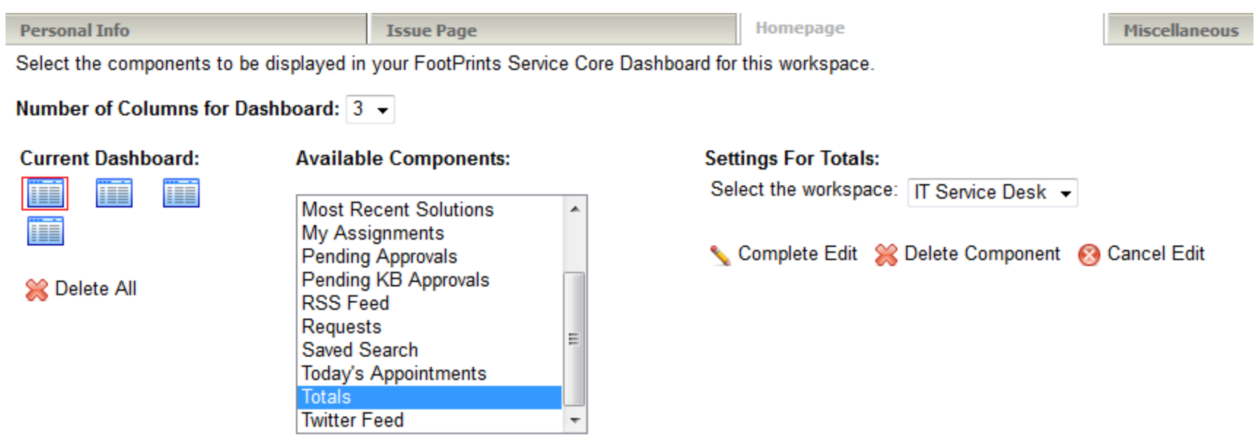
1. In the Available Components field, *select* a **dashboard component** to add. (**Note:** Only one component can be selected at a time.) Fields are automatically displayed based on the component type selected.
2. *Enter* **additional information** as required.
3. *Click* the **Add Component** button. (**Note:** The dashboard component will be displayed as an icon on the Agents Dashboard area.)

The top right-hand corner of the Service Core Dashboard title bar includes shortcuts to collapse and expand all components. Individual components can be expanded, collapsed, or closed by clicking the appropriate button on the component title bar. The available components and a brief description are listed below:

- **Currently Logged In Agents:** Use this option to list the number and Agents logged into IT Service Manager. When specifying this component, the number of records to display on the first page of the list is specified.
- **Custom Defined**: Use this option to insert custom code that will display in a Dashboard component. This can be HTML, JavaScript, etc.
- **Global Issues:** Use this option to displays Global Issues. When specifying this component, the number of records to display must also be specified.
- **Most Recent Solutions**: Use this option to display recent Solutions from the Knowledge Base. The number of characters to display for the Solution title field must be specified.
- **My Assignments:** Use this option to list the Issue number and title of active Issues. The list entries are linked to Issues. Clicking a list entry opens the Issue. When specifying this component, the number of records to display on the first page of the list must be specified.

- **Pending Approvals** (for Change Management approvers): Use this option to list change management Issues when the current Agent is included as an approver and still requires a vote. When specifying this component, the number of records displayed for the first results page must be specified.
- **Pending KB Approvals** (for Knowledge Base approvers): Use this option to list knowledge base solutions that the current Agent is tasked to approve. When specifying this component, the number of records to display on the first page of the list must be specified.
- **RSS Feed**: Use this option to display RSS feeds from Agent specified URL's. When specifying this component the number of records to display on the first page of the list must be specified as well as the URL for the RSS feed.
- **Requests**: Use this option to display the number of tickets in Request status. This component will also display the Issue number and Title. The list entries are linked to the Issues. Clicking on a list entry opens the Issue. When specifying this component, the number of records to display on the first page of the list must be specified.
- **Saved Search**: Lists searches saved for quick access.
- **Totals**: Lists the number of Issues categorized by status. The status can be clicked to quickly display the Issues in the main frame.
- **Twitter Feed**: Use this option to display Twitter feeds from Agent specified URL's. When specifying this component the number of records to display on the first page of the list must be specified as well as the Twitter username for the individual.

EDITING/DELETING A DASHBOARD COMPONENT



1. In the Current Dashboard section, *click* the **dashboard component** to be modified. Only one component can be selected at a time.
2. *Change* **settings** as needed.
3. *Click* the **Complete Edit** button. Alternately, to remove a component, click the **Delete Component** button.

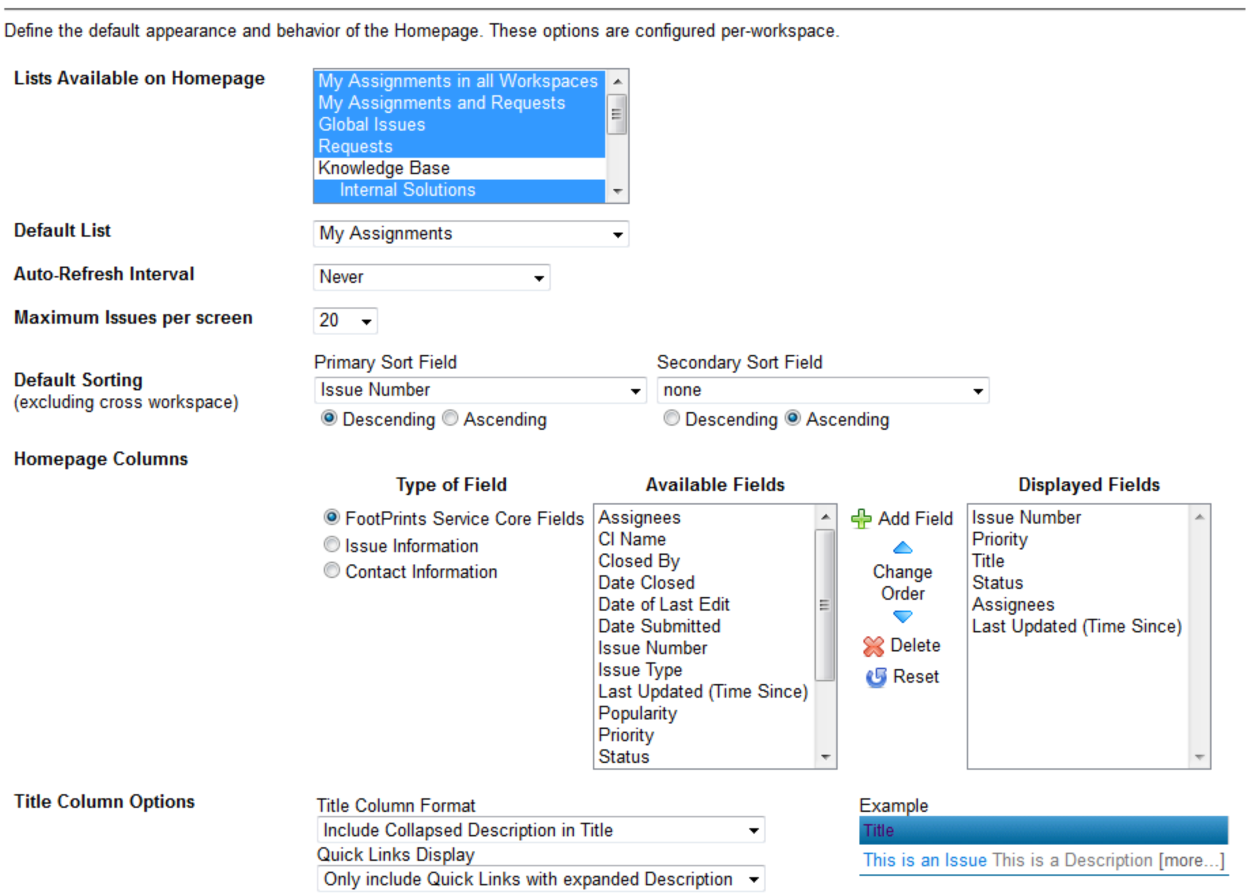
MOVING DASHBOARD COMPONENTS

You can easily move components by dragging and dropping them while on the **Home Page**. This cannot be done while in My Preferences.

DRILLING DOWN ON DASHBOARD GRAPH

When you add a graph to the dashboard you will be able to drill-down by single clicking on the piece of the chart you are interested in. When you do so, associated details are automatically revealed below the dashboard, where the Issue list normally displays.

CONFIGURING THE HOME PAGE ISSUES LIST



By default, the **My Assignments** Issue List will display on an Agents Home Page. The My Assignments Issue List displays the most recent open assignments for an Agent, and is the recommended view for most Agents. It displays information quickly and continuously updates the Agent's assignments. Agents (or Administrators) can select different Issue List views to display, or build completely custom views. The Home Page tab provides the following options:

- The lists available on the Home Page.
- The list displayed by default.

- How often the list is to be refreshed. By default the list refreshes each time the **Workspace Home** is clicked on the toolbar, or any action that brings you back to the Home Page is performed.
- The maximum number of Issues displayed on each window.
- The field to sort the list by; determine if it should display in ascending or descending order.
- A secondary sorting field; determine if a secondary sort should be ascending or descending.
- The option to create a customized list of columns and sort orders.
- The option to control column format and when Quick Links should appear.

3.1.5 MISCELLANEOUS TAB

IT Service Manager Agent's **SHOULD NOT** make any modifications to the Miscellaneous tab.

3.2 ISSUE SEARCH

3.2.1 QUICK SEARCH

The Quick Search box is located in the top frame. It is available from all of the IT Service Manager windows.

The Quick Search field drop-down has three options:

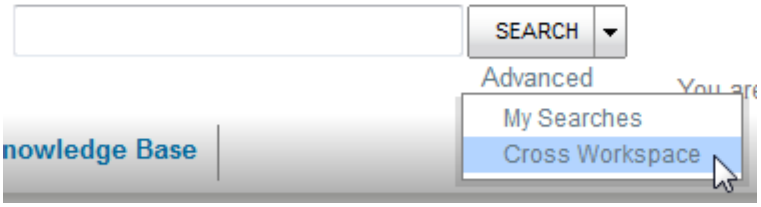
- **Title**: Search within Issue Titles for characters or words.
- **Keyword**: Searches within the title, description, Issue and address book fields. (**Note:** If a selection is not made in the drop-down, by default, the search is performed on the Title field.)
- **Numeric**: Searches for corresponding Issues with the entered value. To perform a string search on a numeric value, the numeric value must be enclosed in double quotes (").

Once the Search type selection is made, enter your search term and *click* **Search.** A list of Issues matching the search criteria will be displayed on the Home Page Issues List.

3.2.2 ADVANCED SEARCH

The Advanced Search feature allows searching the IT Service Manager application with any combination of fields and advanced criteria. IT Service Manager will automatically generate the Advanced Search form necessary to display any custom and built-in fields that would be included. For example, if a new field is added by the Workspace Administrator, the field is included automatically on the Advanced Search form. In the same way, if a field is deleted from IT Service Manager, it is removed from the Advanced Search form.

To perform an advanced search, click the **Advanced** link located under the Quick Search button.



The Advanced Search form contains three panes where search criteria can be defined and one pane used to save custom searches. Those windows are:

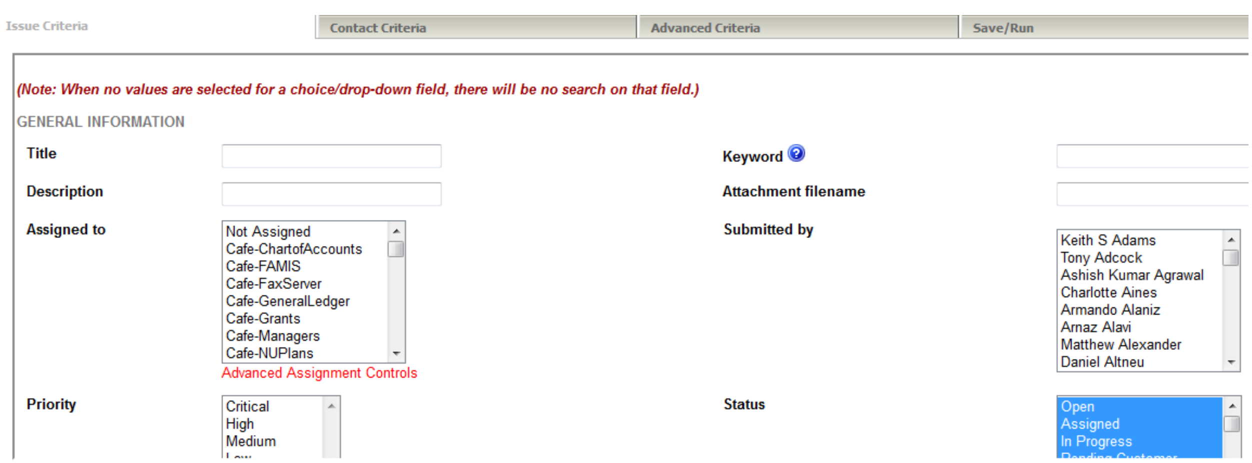
- Issue Criteria
- Contact Criteria
- Advanced Criteria
- Save/Run

Issue Criteria

The Issue Criteria window has two parts; General and Issue Information. Any custom tabs created are available below the Issue Information section.

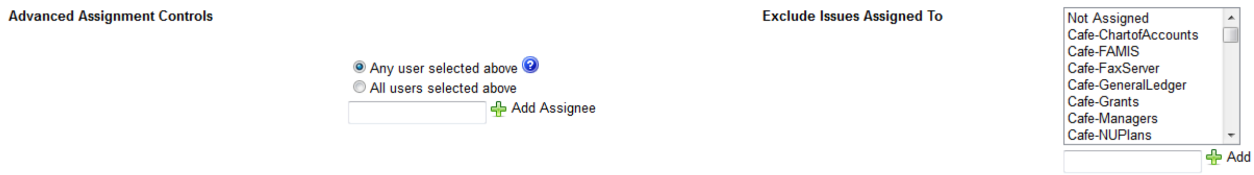
General information can be included in the search based on:

- **Title**: Search by Title for characters or words.
- **Keyword**: Search ALL fields for the search term entered.
- **Description**: Search Description field for entered term.
- **Attachment filename**: Search all attachments for search term.
- **Assignees**: Search for Issues assigned to an Agent or Agents.
- **Submitted by**: Search for Issues submitted by a specified Agent.
- **Priority**: Search for Issues matching the entered priority or priorities.
- **Status**: Search for Issues matching the entered status or statuses.



Advanced Assignment Controls

In addition to filtering the Agents or teams listed on the filtered Issues, Agents are able to exclude Issues that contain certain Agents and/or teams.



3.2.3 ISSUE INFORMATIONAL AREA

Below the General Information area is the **Issue Information area**. At a minimum, you can search here based on:

- Problem types.
- Creation/modification information dates.
- Content of custom fields.

CONTACT CRITERIA

Use the Contact Criteria window to search for users contact information within an Issue.

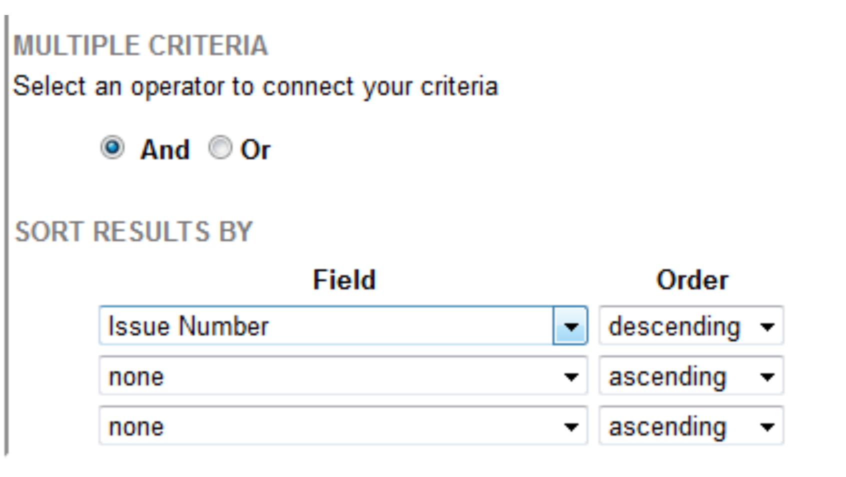
Note: The Address Book is not searched; this is accomplished using the Address Book's search facility. This is covered in detail in the *Address Book Management* chapter later in this guide.

ADVANCED CRITERIA

The Advanced Criteria window allows searches to be based on:

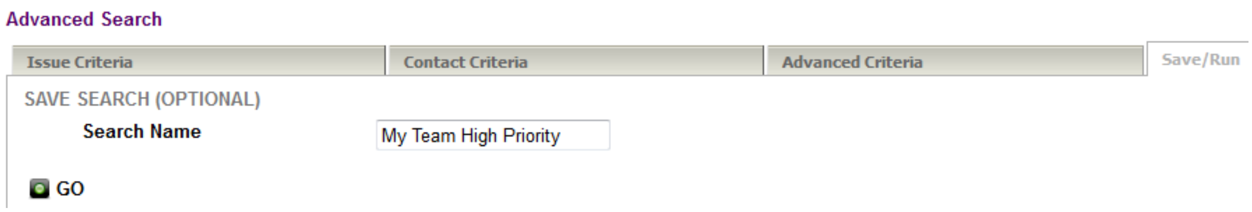
- The type of Issue to include.
- The date and/or age of the Issue.
- More than one criterion.

This window is also used to determine the order results are sorted. The searches are sorted and re-sorted by up to three different criteria types. To do this, use the **Multiple Criteria** area.

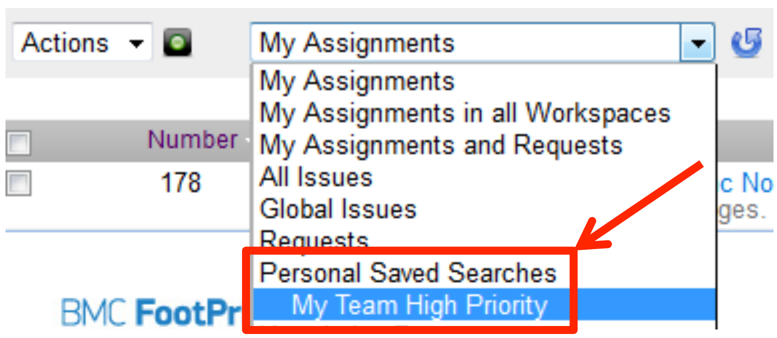


SAVE/RUN SEARCHES

The Save/Run window allows Agents to immediately run a report and view the results. You can also save the search, so it can be quickly run at a later date without recreating the criteria. Searches will be saved in your queue list.



After a search is saved, it is accessible in the Agents Display drop-down field on the IT Service Manager Home Page under **Personal Saved Searches**.



3.3 ISSUE LIST FILTERS

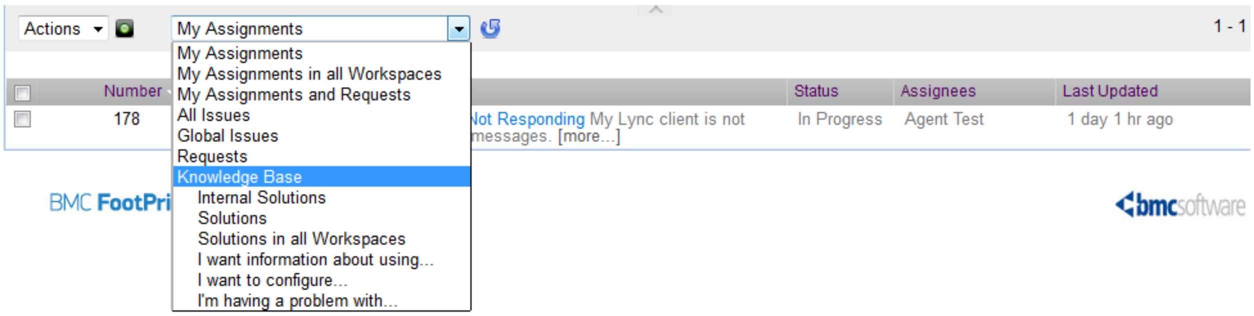
After logging into IT Service Manager, the open Issue list is displayed. This list is designed to provide basic data such as the Issue number, title, status, assignees, and last updated date.

Filtering the Issue List

A filter is provided for the Issue List that provides a variety of views for sorting Issue types. Several of these display options are: My Assignments, All Issues, Global Issues, Requests, and Knowledge Base entries. To apply a filter, make a selection from the menu. The Issue List should automatically update.

3.3.1 BUILT-IN QUEUES

The Display drop-down list on the Home Page contains a number of built-in queues. When selected, the Home Page list is updated with the results.



The Built-in Queues that are available are:

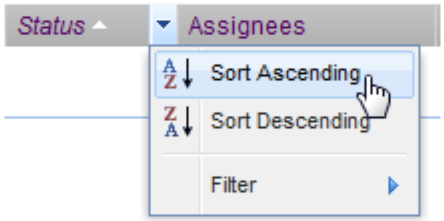
- My Assignments – The most recent active Issues assigned to you.
- My Assignments in All Workspaces – Active Issues assigned to the current Agent in all Workspaces.
- My Assignments and Requests – Active Issues assigned to the current Agent AND unassigned Requests from customers.
- All Issues – All Issues in IT Service Manager.
- Global Issues – All active Global Issues.
- Requests – Requests submitted by customers.
- Knowledge Base
    - Internal Solutions – All internal Solutions.
    - Solutions – All public Solutions.
    - Solutions in All Workspaces – All public Solutions in all accessible
    - I want information about using... – A custom Northwestern query used for Public Knowledge Base searching.
    - I want to configure… – A custom Northwestern query used for Public Knowledge Base searching.
    - I’m having a problem with… – A custom Northwestern query used for Public Knowledge Base searching.

3.3.2 FILTERING THE ISSUE LIST USING COLUMN HEADERS

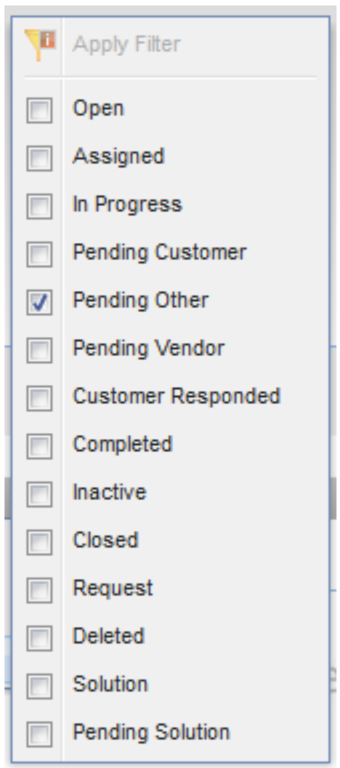
When a filter is selected using the column header, the criteria is applied to all records in the associated table. The criteria are preserved until manually cleared, or the user navigates away from the Home Page. Filtering is provided for select columns only. Multiple columns can be filtered by making a selection from the respective column headers. When a filter is applied to a column, the column header text is displayed in italics.

Filter Issue List Using Column Headers

1. *Position* the mouse cursor on an Issue List column heading to reveal a blue menu arrow.
2. Click the menu arrow.
3. Click the **Filters** option to display a menu of values.



4. Select one or more values from the list.



5. Click **Apply Filter** to apply the filter.
6. Repeat steps 1 through 3 if you need to apply additional filters.

3.3.3 CLEARING FILTERS

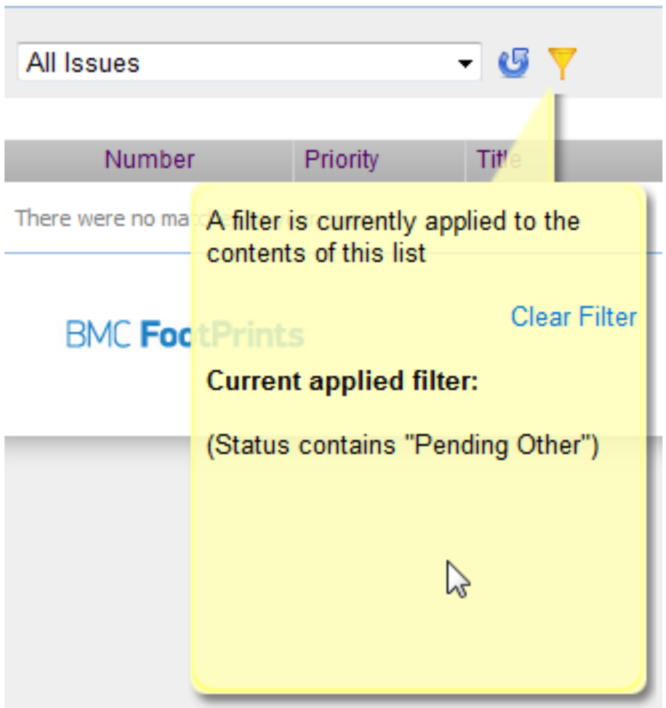
Filters can be cleared from specific columns or all columns applied to the Issue List.

Clear Filters Applied to the Issue List via Column Drop Downs

1. *Position* the **mouse cursor** over an Issue List column header to display a menu arrow.
2. *Click* the **menu arrow**.
3. *Click* **Filters** to display a menu of values.
4. *Uncheck* **previously selected values**.
5. *Click* **Apply Filter**.
6. *Repeat* steps 1 through 3 to clear filters from other columns.

Clear All Filters Applied to the Issue List

1. Click the **yellow funnel** displayed above the Issue List. (This funnel is only displayed if filters are applied to the Issue List).



Click **Clear Filter** to remove all filters applied to the Issue List.

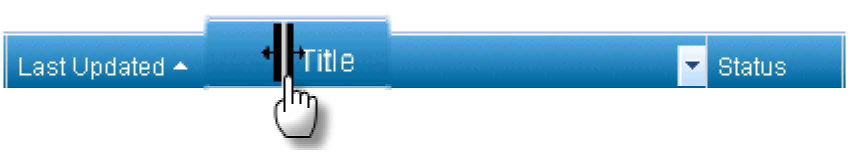
3.3.4 COLUMNS

Sorting by Column

This feature allows users to change the sort order of Issues by clicking the column header. Click once to sort the column in ascending order; first to last. Click a second time to reverse to descending order; last to first. Sorted fields include a solid white arrow next to the column name. This arrow indicates the sort direction.

Resizing Columns

Columns can be resized by positioning the mouse cursor between column headers and dragging left or right.



Reordering Columns

The order of the columns in the Issue List can be changed by clicking the column header and dragging to the right or to the left. Two blue arrows indicate where the column is placed.

3.3.5 VIEWING THE DESCRIPTION

The first couple of sentences of the most recent Description are displayed in the Issue Title. These are differentiated through the use of font colors; blue is used for the Issue Title and dark grey is used for the most recent Description.

To view more of the Description without opening the Issue, click the **[more…]** link to reveal additional options below the Issue, and then click the **Descriptions** link.

3.4 WORKING WITH MASTER ISSUES

IT Service Manager allows any issue to be split into Subtasks that can be assigned to different groups for resolution. Any issue with assigned subtasks is considered a Master Issue. For example, an Issue can be submitted to set up a work area for a new hire. One technician is responsible for the overall coordination of the process. Additional technicians will receive *Subtasks*, such as setting up passwords, obtaining hardware, imaging a PC, and any other pre-requisite tasks to be completed before preparations for a new employee are complete.

Note: *Subtasks* can be sequenced such that any prerequisite *Subtasks* must already be completed before the conditional *Subtask*.

There are two ways to create a *Master Issue* with *Subtasks*, both require the Issue to be opened using the **Details** link.

1. Create the *Master Issue* then add *Subtasks*.
2. Link an Issue to another Issue, making the former a *Subtask* of the latter.

3.4.1 MASTER ISSUE SUBTASKS

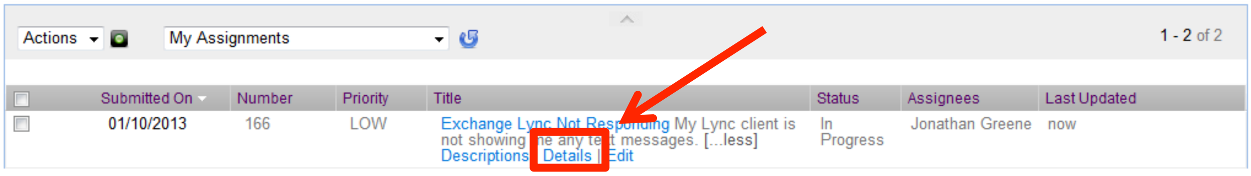
Subtasks are all actions that need to be completed to resolve a single *Master Issue.*

CREATING SUBTASKS FROM A MASTER ISSUE

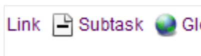
When you create a *Subtask*, many of the fields are pre-populated from the content of the *Master Issue*. These fields can be modified and completed just as for a regular Issue.

Create a Master Issue and Add Subtasks

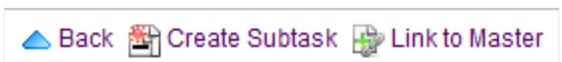
1. *Create* an **Issue**.
2. From the Home Page, find the issue you'd like to make the Master Issue, and *click* the **Details** link.



3. It will open the issue in the **Details** view.
4. *Click* the **Subtask** button to access the ***Subtask** toolbar*.



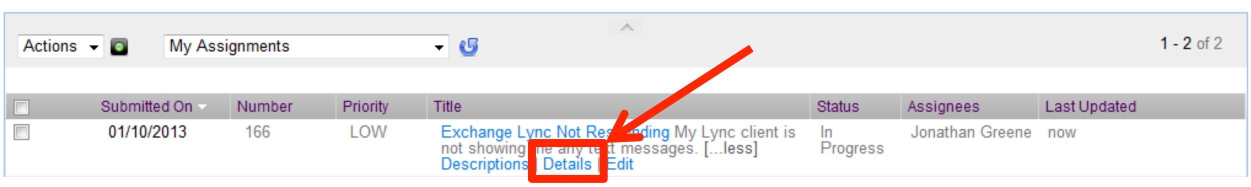
5. *Click* the **Create Subtask** button. (**Note:** The window that opens will contain much of the same information as the Master Issue. This Issue is linked back to the original Issue rendering it a *Subtask*).



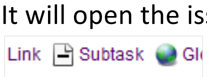
6. *Enter* the *Subtask* **details**. Any field in the Subtask issue can be changed to provide further instructions to the group assisting.
7. *Click* **Save** to return to the *Master Issue*.
8. If additional Subtasks are required, *Repeat* **steps 3 – 7.** Master Issues can have any number of Subtasks associated with the Issue.

LINKING A NEW ISSUE TO A MASTER ISSUE

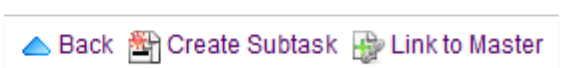
1. *Create* an **Issue**.
2. From the Home Page, find the issue you'd like to link to a Master Issue, and *click* the **Details** link.



3. It will open the issue in the **Details** view.

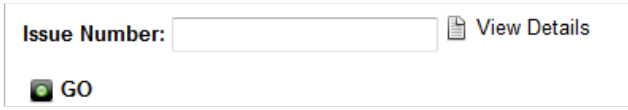


4. *Click* the **Subtask** button to access the ***Subtask** toolbar*.



5. *Click* the **Link to Master** button.
6. *Enter* the **number** of the Master Issue. (**Note:** To verify the correct Issue number is entered, the **View Details** button can be clicked to view the Issue as read-only or you can *click* the **View**

Master Issues button to choose from a list of active Master Issues.



7. *Click* the **Go** button to return to the Subtask.

UNLINKING SUBTASKS

The same window is used to unlink Subtasks used to enter the sequence by clicking the **Unlink** button.

3.5 WORKING WITH GLOBAL ISSUES

Global Issues differ from *Issues* in that they may be linked to many common or duplicate *Issues*. There will, at any given time, be a handful of *Global Issues*, which will be reserved for important, mission critical Issues that affect many users, such as system outages, application bugs, or virus warnings.

3.5.1 CREATING GLOBAL ISSUES

An Agent or Administrator has the ability to create a global issue.

1. On the Home Page, *position* the **mouse cursor** over the New Issue button in the toolbar.
2. *Select* **New Global**.
3. A new Global Issue is created.

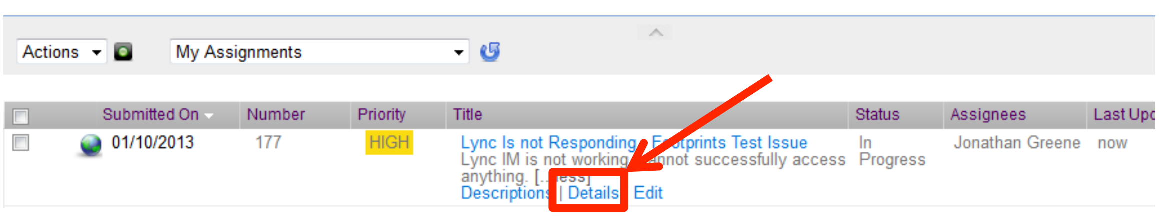
3.5.2 GLOBAL LINKS

When a Global Issue is created, it is common for users to continue to report issues for the same underlying problem. Instead of creating a number of separate Issues, users can link these contacts to the Global Issue, creating a Global Link. When a Global Link is created many properties of the Global Issue are inherited while still maintaining the contact information for the individual customer. When a Global Issue is closed, all of the Global Links are also closed. Global Links can be created from a Global Issue or a regular Issue.

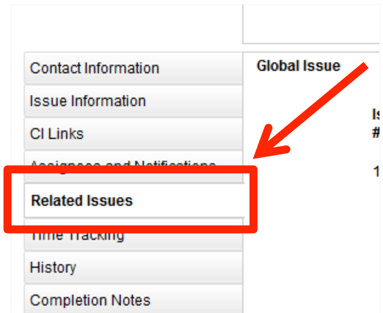
UNLINKING A GLOBAL LINK FROM A GLOBAL ISSUE

Once a Global Issue is closed, the Global Links automatically close. However, there can be situations when a customer calls the service desk to communicate that the problem still exists. Therefore, IT Service Manager has the ability to unlink a Global Link from a Global Issue.

1. From the Home Page, find the Global Issue, and *click* the **Details** link.



2. It will open the Global Issue in the **Details** view.
3. *Click* the **Related Issues** tab.

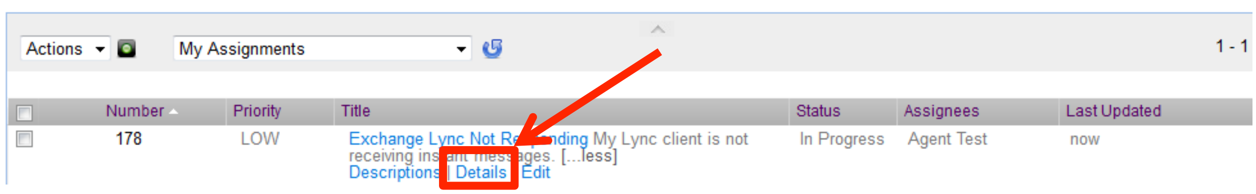


4. *Click* the **Unlink** link.

3.5.3 LINKING ISSUES

Two individual *Issues* can be linked together if they are related. Linking Issues is accomplished by copying an Issue, creating a Master Issue/Subtask relationship, or through Global Links. Issues can also be linked directly to one another. A static link that changes in one Issue does not affect the data within the other Issue. Dynamic links can also be used. Dynamic links will cause changes made on one issue to be reflected in the other. Issues can be linked within a Workspace or across multiple Workspaces.

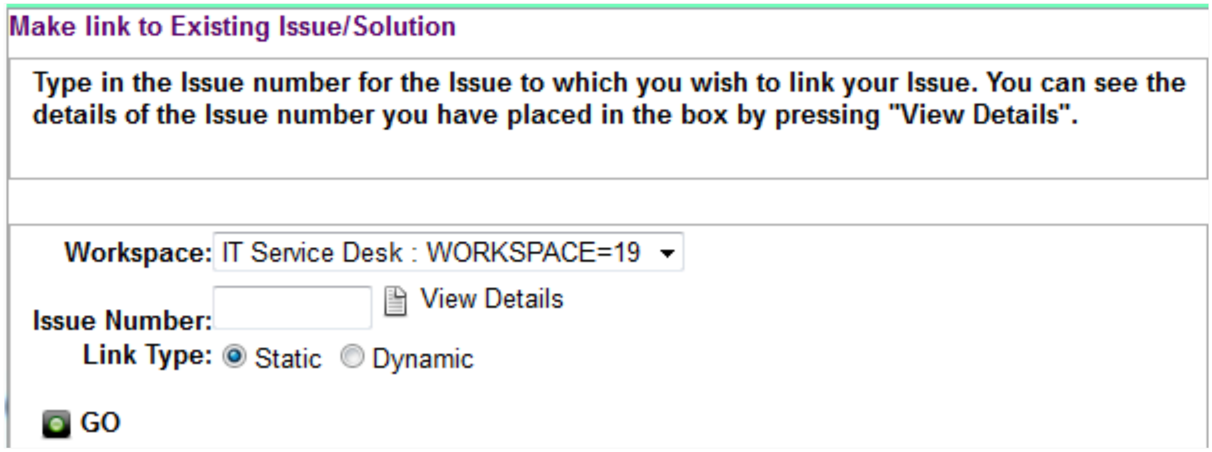
1. Before creating a link, obtain the Issue number of the Issue to link to.
2. From the Home Page, find the Issue, and *click* the **Details** link.



3. It will open the Global Issue in the **Details** view
4. Click the **Link** button.

5. Select the **Workspace** that contains the Issue to be linked.

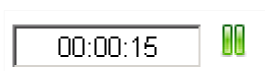
6. Enter the **Issue Number**.



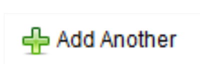
7. Click the **View Details** button to verify the correct Issue number is entered.
8. Specify a **Link Type**.
9. Click the **Go** button.
10. To view the linked Issue, or to unlink, click the **Related Issues** tab.

3.6 TIME TRACKING

IT Service Manager enables the automatic tracking of time. The elapsed time spent creating an *Issue* is displayed in the upper right hand corner of the *Issue* window. This **time tracking** can be used to verify the amount of time Agents spend on specific Issues. The **clock** stops running when an Issue is not actively being worked, and starts again when an Agent opens the ticket. If necessary, you can use the pause button to stop the **clock** if necessary.



Some units have employees who might work remote or off site, and would not physically be able to have the ticket open while working with a customer. For these situations, the **Time Tracking** tab would allow them to enter additional time spent working an *Issue*. To make more than one time entry, click the **Add Another** button. Once the *Issue* is saved, the cumulative time is displayed.



4. REPORTING

4.1 REPORTING FUNCTIONALITY

IT Service Manager contains a number of reporting options, which range from simple keyword searches to multi-level metrics with color charts. Practically any data field that exists in IT Service Manager can be reported on to analyze activity, trends, or statistics.

Reporting can be conducting using basic reporting features or advanced reporting features.

Basic Reporting Functionality

- Overview of different reporting tools.
- Creating basic custom reports.
- Creating custom reports with metrics.
- Automated delivery of reports.

Advanced Reporting Functionality

- Overview of Built-in Metrics Reports.
- KPI's that can be produced by IT Service Manager.
- Advanced Date and Time controls.
- Printing issues in different report formats.

4.2 CREATING REPORTS

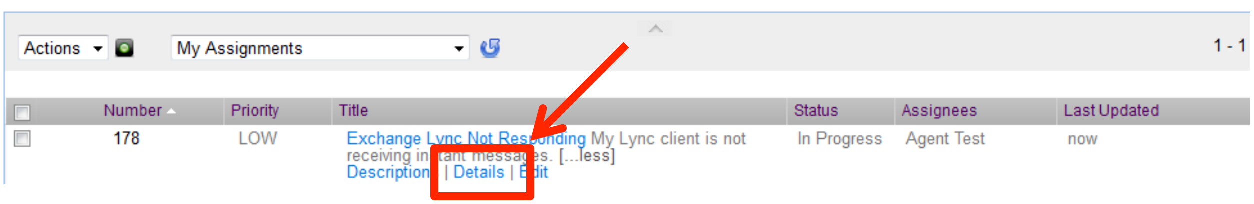
IT Service Manager has several types of reporting tools, including the following:

- Single Issue/Quick Reports
- Custom Reports (with the option for Custom Metrics)
- Built-in Metrics Reports

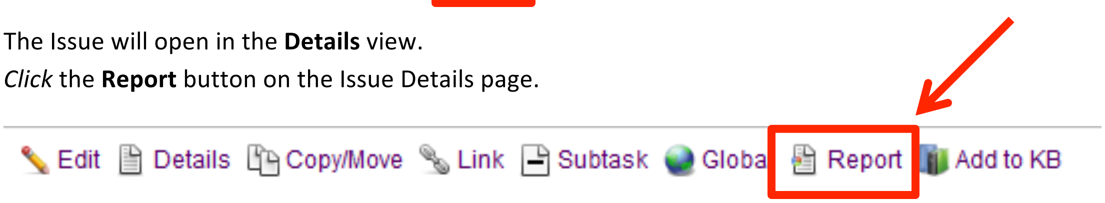
4.2.1 SINGLE ISSUE/QUICK REPORTS

Single Issue/Quick Reports appear on the Details window of each Issue.

1. From the IT Service Manager Home Page, find the Issue you would like to view and *click* the **Details** link.



2. The Issue will open in the **Details** view.
3. *Click* the **Report** button on the Issue Details page.



Exchange Lync Not Responding

Issue Number	178	**Submitted On**	01/10/2013
Priority	Low	**Submitted At**	14:48:23
Status	In Progress	**Last Edited On**	01/10/2013
Submitted By	Agent Test	**Last Edited At**	14:53:58
Assignees	Agent Test		

Description

Entered on 01/10/2013 at 14:48:22 CST (GMT-0600) by Agent Test:
My Lync client is not receiving instant messages.

SLA Due Date	01/17/2013 9:48 AM	**SLA Response Time**	01/11/2013 1:48 PM
Request Type	Incident	**Submission Tracking**	Agent
Service Family	Email, Calendaring, Messaging and Collaboration	**Service**	Exchange - central
Category	Client	**Sub-Category**	Lync - Windows
Impact	Single User	**Urgency**	Routine

Complete Notes

Entered on 2013-01-10 at 14:48:22 by Agent Test :

<p>Reinstalled client, reconfigured Lync</p>

Completion Code	Resolved Successfully	**Select?**	No
Last Name	Smith	**First Name**	Timmy

4. Only the fields that contain data appear in the report. (**Note**: Master Issue reports will contain a list of all Subtasks. Global Issue Reports will contain a list of all Global Links.)

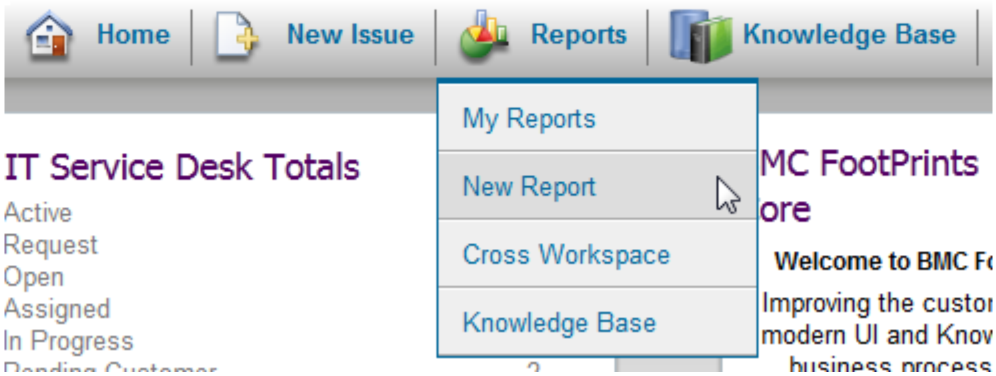
4.2.2 CUSTOM NON-METRIC REPORTS

Custom Reports provides Agents with the ability to create report templates based on any combination of criteria, including many appearance-formatting options. These formatting options include the following:

- Headings
- Columns
- Sorting
- Color Graphs and Charts

CREATING CUSTOM NON-METRIC REPORTS

1. From the IT Service Manager Home Page, position the mouse cursor over the **Reports tab**.



2. *Select* **New Report**.
3. Use the data element guides below to select the appropriate fields for the report.

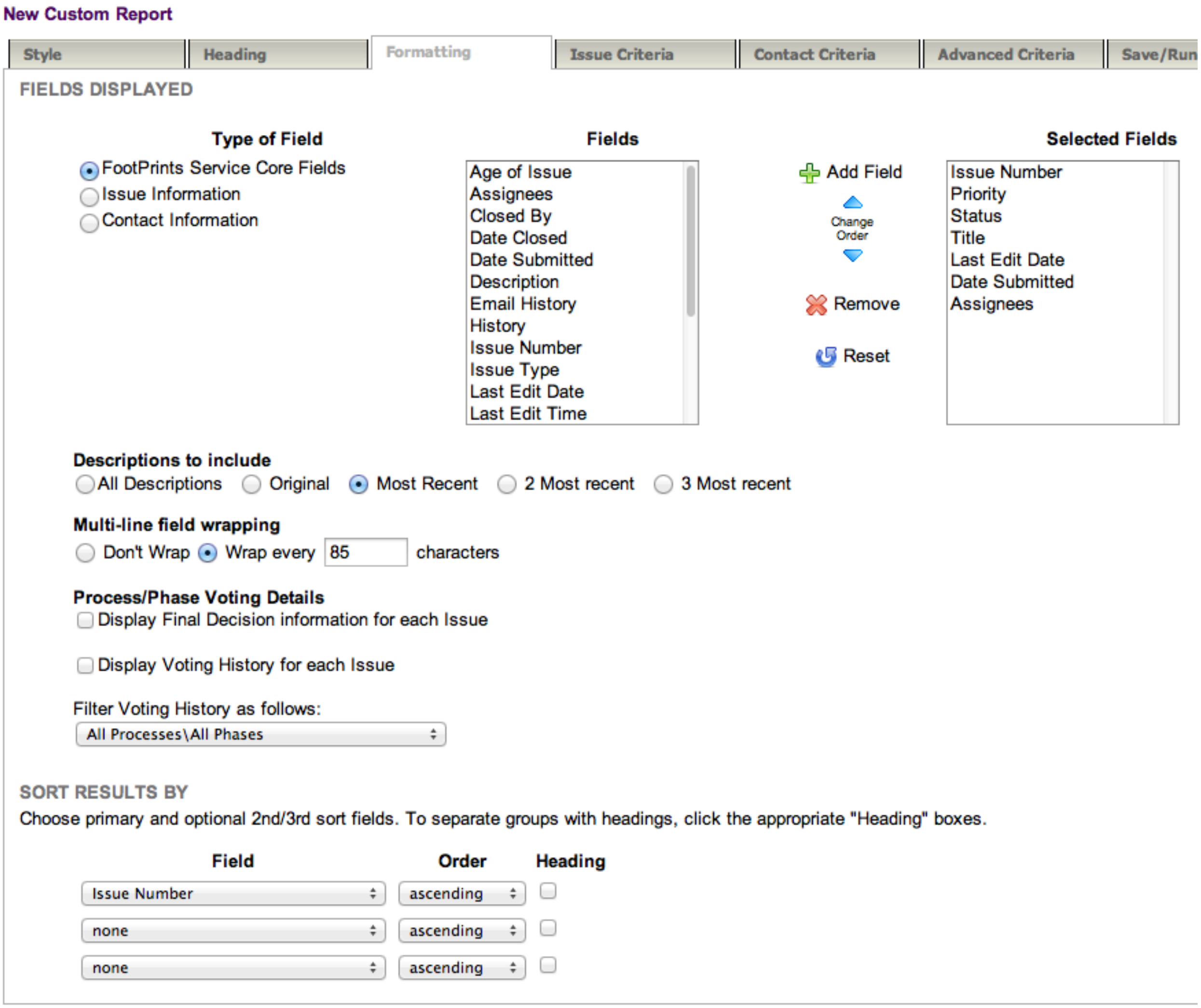
STYLES TAB

- **Columns**: Issue data is displayed in fixed columns. One Issue is displayed per row.
- **Wrapped**: Each Issue returned is displayed in a table. Line breaks can be used to break data into multiple rows.
- **Metrics/Graphics**: Create custom metrics and graphs of counts, averages, and sums on any field. Both first and second level metrics are supported. Output design options include table, bar, and pie charts.
- **Export**: Export the data to a text file. The exported text file can then be imported into another application.
- **Combo**: Includes metric charts and graphs in Column or Wrapped reports.

HEADING TAB

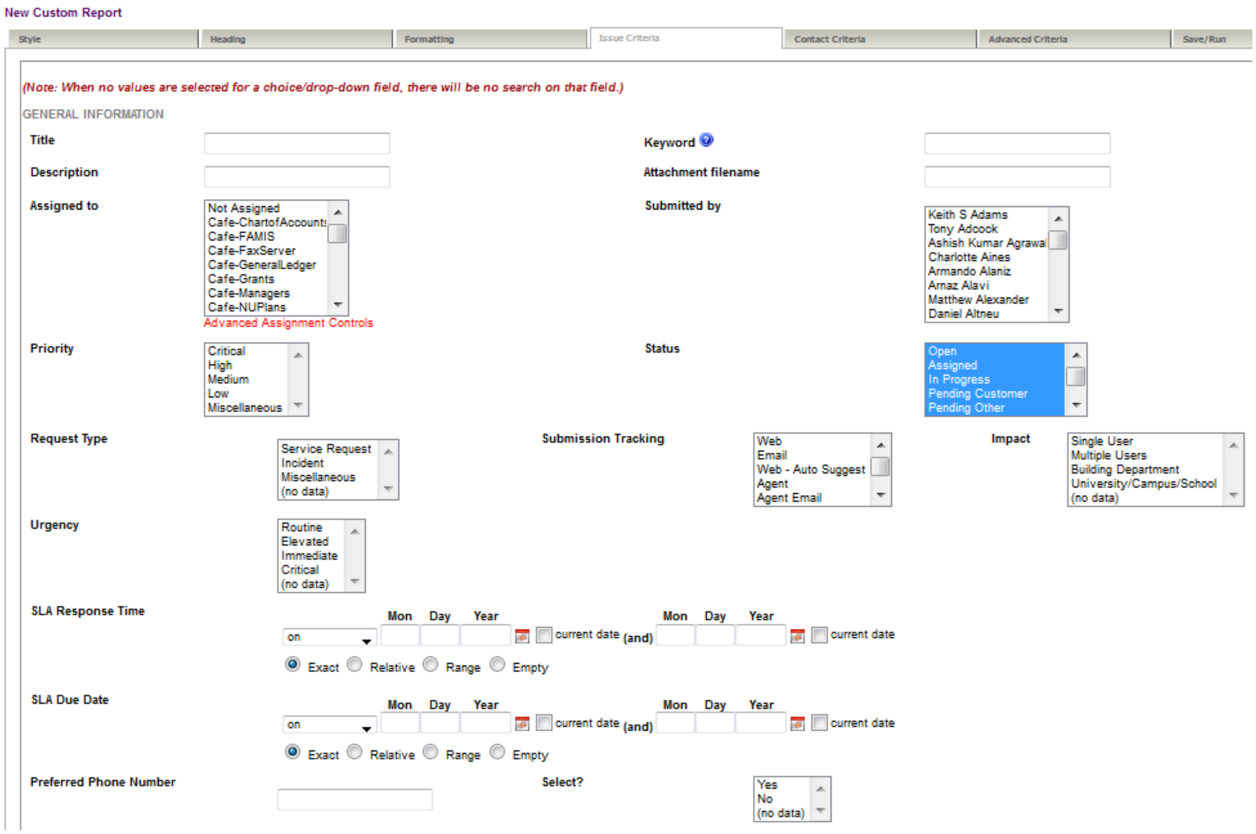
- The Report Title appears at the top of the new report, but it is not the "saved" name of the report.
- Other heading options include date, time, workspace name, and logo graphic.

FORMATTING TAB



- **Fields Displayed**: The fields included in the reports.
- **Descriptions to include**: Options include all descriptions, only the original description, only the most recent description, and either the 2 or 3 most recent descriptions.
- **Multi-line field wrapping**: Options include don't wrap the descriptions or wrap every X number of characters.
- **Sort Results By**: Choose the primary and optional secondary and tertiary fields for sorting the report. To group by a field, enable the appropriate heading check box.

ISSUE CRITERIA TAB



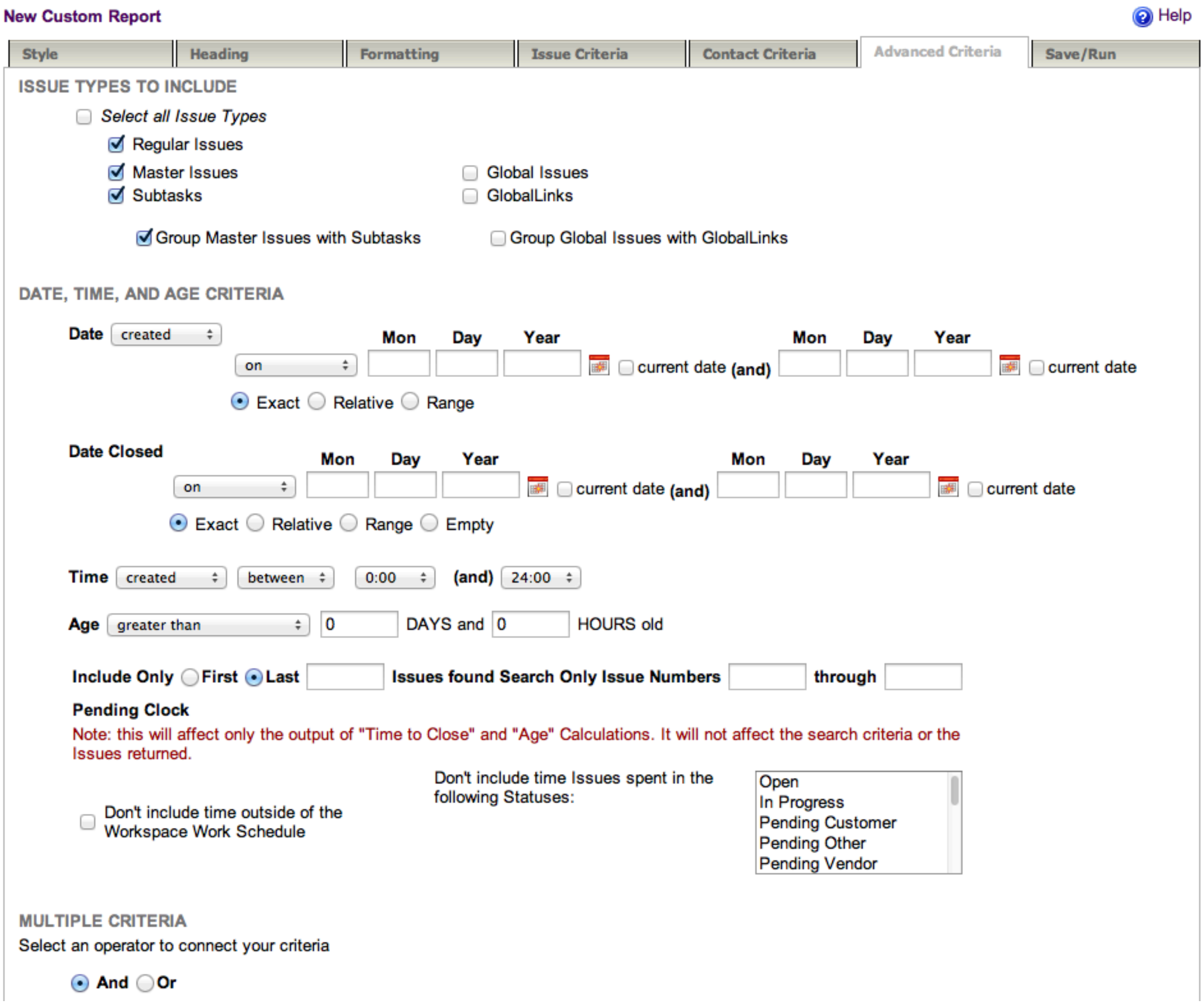
Use the Issue Criteria tab to select data fields by which Issues will be selected and run in the report. At a minimum, the following criteria can be selected:

- Title
- Keywords
- Description
- Attachment Filenames
- Assigned to
- Submitted by
- Priority
- Status

CONTACT CRITERIA TAB

Use the Contact Criteria tab to select user contact information within an Issue. (**Note**: When no values are selected for a choice/drop-down field, there will be no search in that field.)

ADVANCED CRITERIA TAB



The Advanced Criteria tab provides the ability to use advanced date and time filters, including the method for calculating the *Time to Close* and *Age of Issue* statistics. The following options are included:

- Search based on the time an Issue was last created or last edited.
- Given an Agent-specified number, include only the most recent number of Issues found.
- Don’t include time outside of the Workspace Work Schedule. Enable this option for IT Service Manager to calculate the age of issue and time to close based on defined working hours instead of real time.
- Don’t include time Issues spent in the following statuses. Enable this option when the time spent on an Issue in a particular status or Issues with a certain status (i.e. Pending) should NOT be included in time calculations.

SAVE/RUN REPORT

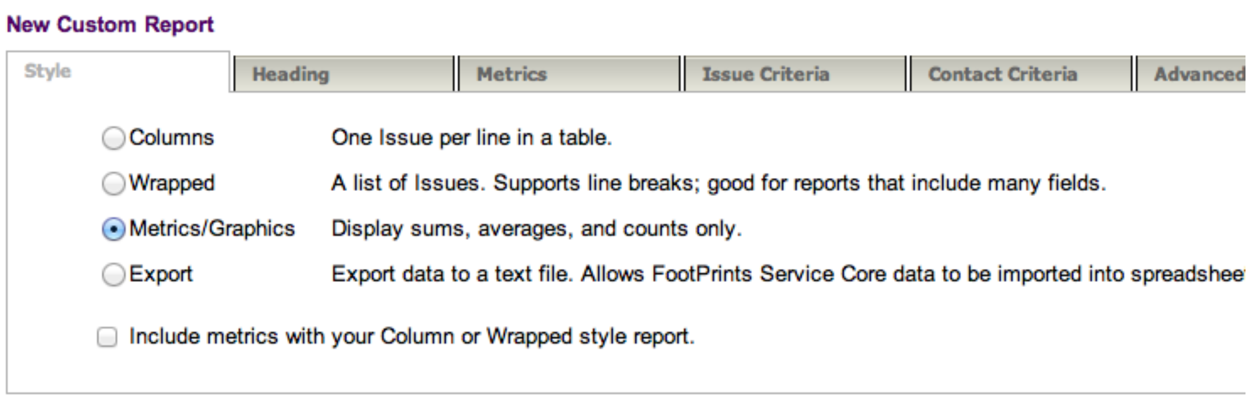
After entering all report information, in addition to running, the report can be saved. To save the report, enter a name, and *Click* **Go**.

4.2.3 CUSTOM METRICS/GRAPHICS REPORTS

Metric reports return statistical data and metrics about a Workspace, instead of return Issue data. The steps for these reports are generally the same as for non-metric reports, though there are several additional settings to specify.

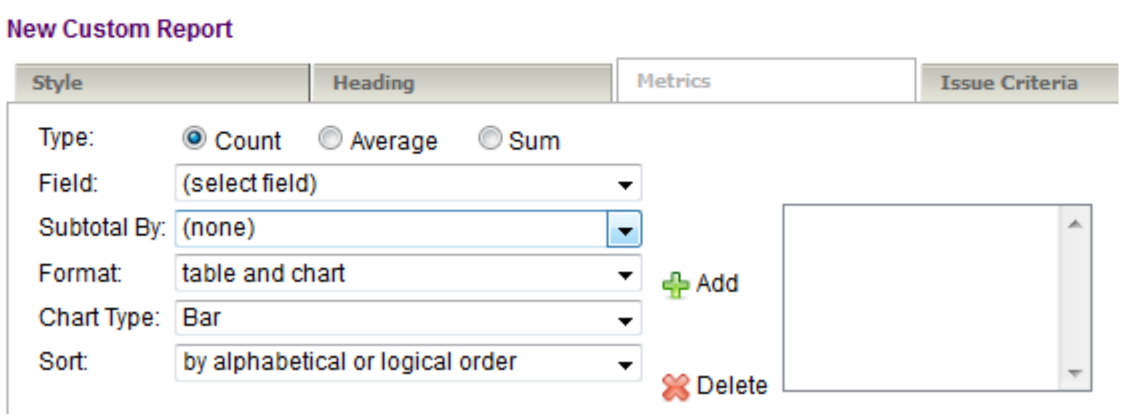
CREATING CUSTOM METRIC/GRAPHICS REPORTS

1. From the IT Service Manager Home Page, position the mouse cursor over the **Reports tab**.
2. *Select* **New Report**.



3. *Select* **Metrics/Graphics** on the Style Tab. Allow application to reload.
4. *Select* the **Metrics tab**. Options for data elements within the Metrics tab are detailed below.

METRICS TAB



Type includes the following options:

- **Count**: A count or breakdown on field data. This shows how many times an entry was made into the selected field.
- **Average**: Only applies to numeric and time data; produces the average of values in the selected field. This applies only to built-in statistics—including age of issue, time to close, total billing, and total time—and custom number fields.

- **Sum**: Only applies to numeric and time data; produces the sum of the values in the selected field.

Field is used for creating the metric. (**Note**: The **Date Period field** will only appear when a date or date-time field is selected from the Field menu. The date period allows for reporting Issues based on the day, week, month, year, day of week, hour of day, or hour in the date or date-time field. For example, if a date is chosen to submit for the field, and month for the date period, a breakdown of the number of Issues submitted for each respective month is displayed.)

Subtotal By provides second level metrics for reporting. For example, if the average time to close an Issue is selected as the first field and an assignee is selected as the subtotal, then the average time to close the Issue is broken down for the Agent assigned.

Format allows selection of the output style of the metric. The options include displaying the data in a text-based table, a color graphical chart, or both.

Chart Type provides the option of choosing a bar or pie chart (if Chart or Table and Chart are selected).

Sort includes the following options:

- **By Alphabetical or Logical Order**: Data is sorted by alphabetical or logical field order.
- **By Metric Value Descending**: Data is sorted by frequency or amount in a descending manner with the highest number listed first.

4.3.4 DISPLAY POSITION

For combo reports the metrics or graphics can be displayed before or after the list of returned Issues. This option is only provided if Columns or Wrapped on the Style tab are enabled. To enable them *select* **Include metrics with your Column or Wrapped style report** option on the Style tab.

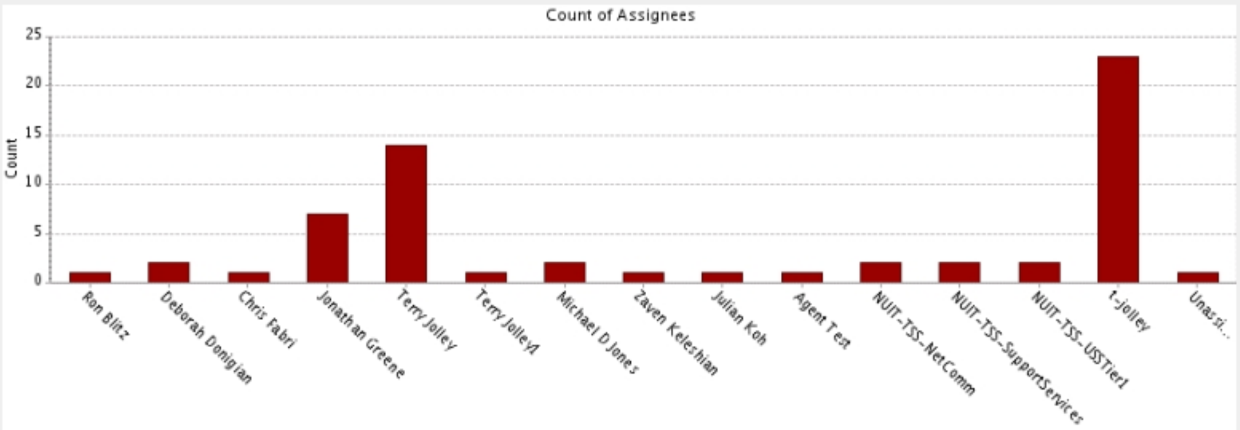
4.3 CHART FEATURES

4.3.1 DRILLING DOWN ON A CHART

Once a chart is added to a report, the IT Service Manager drill down feature can be used to display the specific records that comprise the statistics included in the chart. For example, a chart can be created that displays the number of overdue work orders by Agent, and the drill down feature can then display the specific Issues that are overdue.

IT Service Desk: Assignee's Ticket Totals (03:30 PM, 01/14/2013)

This report contains data from 59 Issues.



Count of Assignees

Ron Blitz	1
Deborah Donigian	2
Chris Fabri	1
Jonathan Greene	7
Terry Jolley	14
Terry Jolley1	1
Michael D Jones	2
Zaven Keleshian	1
Julian Koh	1
Agent Test	1
	2
NUIT-TSS-NetComm	2
NUIT-TSS-SupportServices	2
NUIT-TSS-USSTier1	23
t-jolley	1
Unassigned	1

HOW TO DRILL DOWN ON A CHART

1. *Create* or *run* a **report** that includes a chart.
2. *Position* the mouse cursor over one of the bars.
3. *Click* **selection**.
4. The Home Page is displayed with the Issues represented by the selected bar.

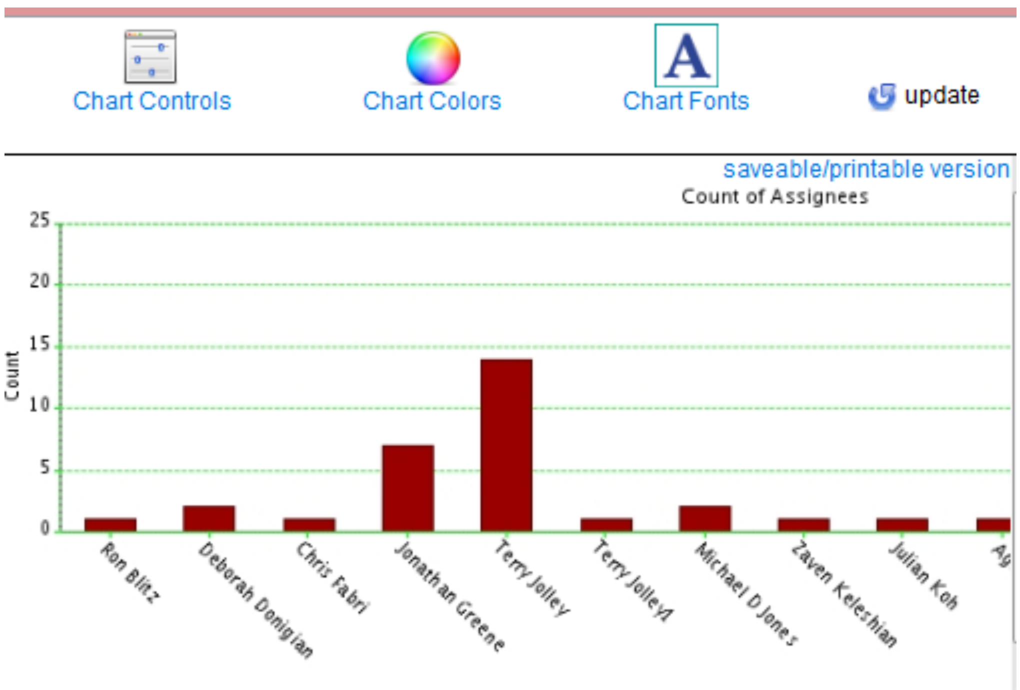
4.3.2 FORMATTING CUSTOM CHARTS

Once a report that includes a chart is created, modifications can be made for easier viewing, including options for the following:

- Chart Controls
- Chart Colors
- Chart Fonts

MODIFYING CHARTS

1. *Create* or *run* a **report** that includes a chart.
2. *Position* the mouse cursor over one of the bars. When the cursor is displayed as a hand, *click* the **chart**.
3. *Select* a **tool**. (The functionality of each tool is detailed below.)



4. Once edits are completed, *click* the **Redraw** button to preview the changes.
5. If everything is displayed as intended, *click* the **Update** button on the chart formatter window to apply the changes.

CHART CONTROLS

The Chart Controls menu includes the following features:

- Modify chart style for 2D or 3D view
- Increase or decrease the space between bars (for a bar chart)
- Modify the title
- Increase or decrease image size

- Modify fill to be solid, left-to-right, or centered
- Add an X a/o Y title
- Add a footer
- Choose if annotations should be included
- Determine the cutoff amount for “Other”

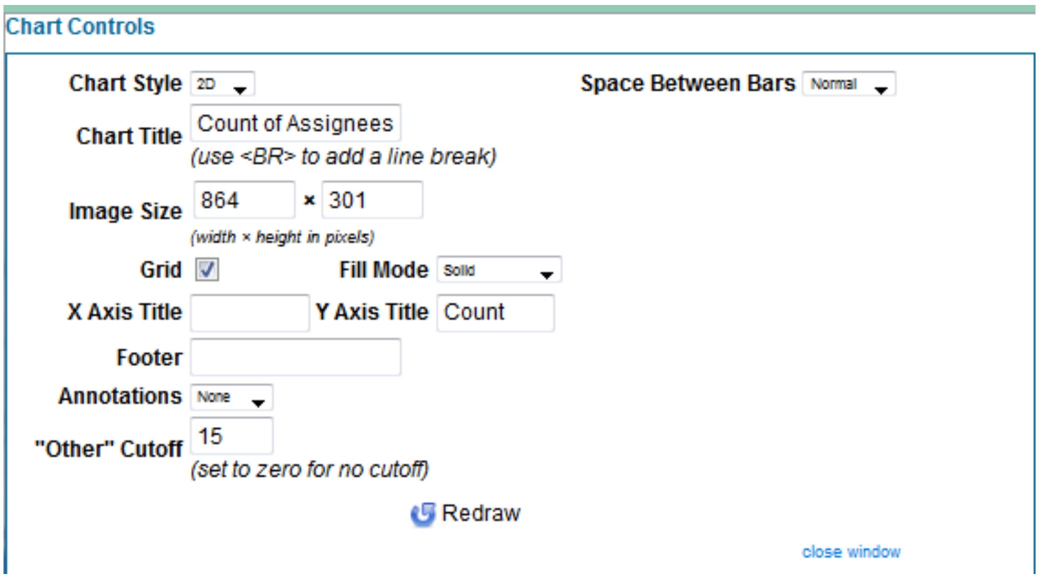


CHART COLORS

Use the Chart Colors menu to select the colors for chart attributes. The menu also includes a color reference chart to provide a visual representation of the colors available.

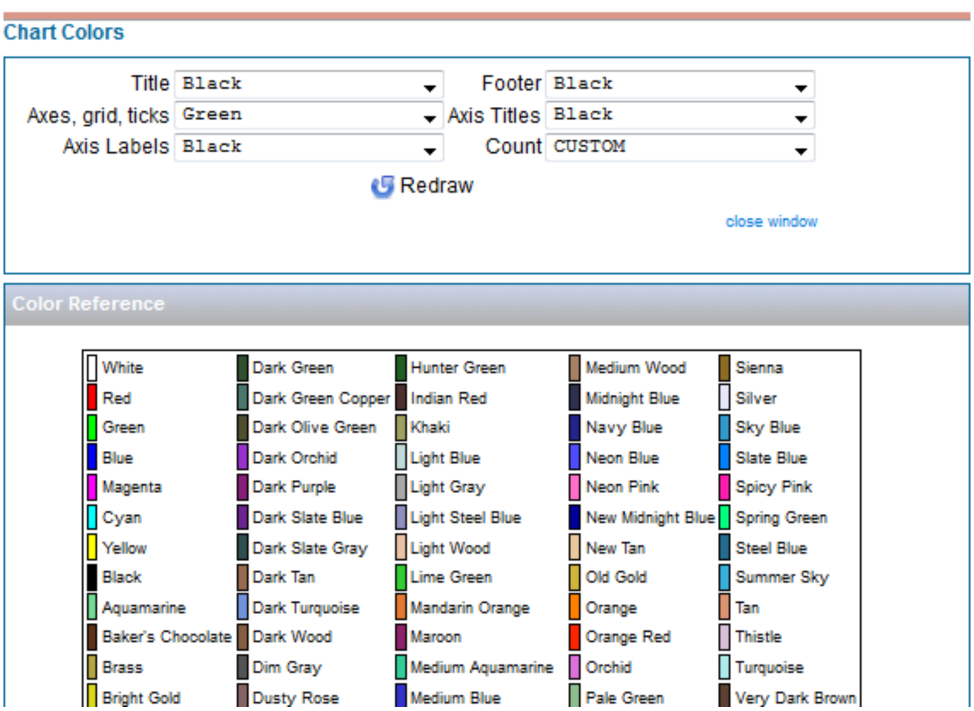
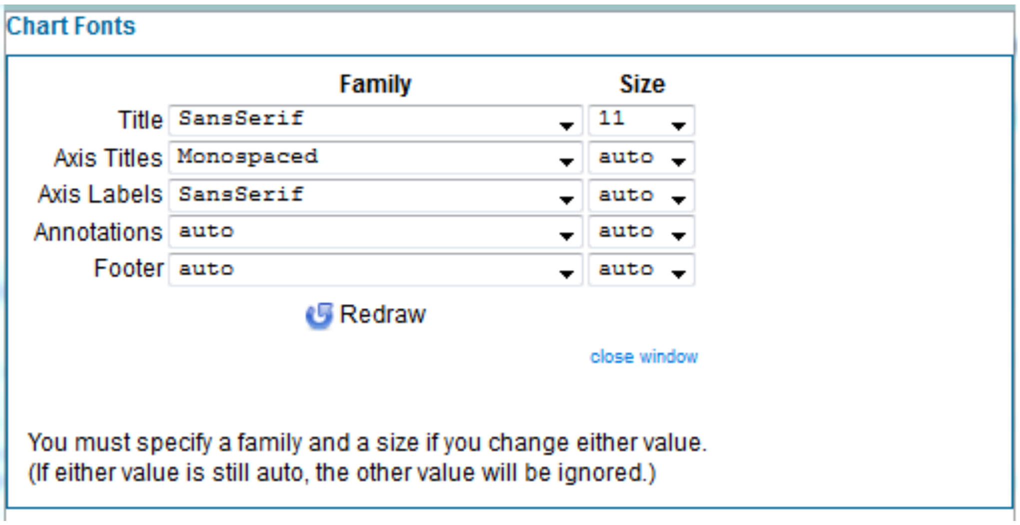


CHART FONTS

Use the Chart Fonts menu to select the font family and re-size chart attributes. (**Note: i**f either value is changed, both values will need to be changed.)



4.3.3 AUTO RUN REPORTS

Reports can be configured to run automatically at set times, and saved to either a shared directory on a server or emailed to anyone with an email address. These auto run reports are configured by the IT Service Manager administrators. If you need to configure Auto Run reports, submit a ticket to TSS-USS-Tier II.