

# iNeed – Service Desk Agent Quick Guide

## *How-to Quick Guide*

**Purpose:** The purpose of this document is to provide a service desk agent (tier 1) managing iNeed service requests with step-by-step guidance to complete common operational tasks.

### **Prerequisite:**

- The agent already has the proper permissions in iNeed.
- The agent owns and manages the service request, including logging, categorisation, escalation, communication with clients and resolution.

### **Acronyms:**

Acronym	Meaning
PDQ	Pre-defined Query
POC	Point of Contact
RB	Reported By
RF	Requested For
SPOC	Single Point of Contact
SR	Service Request
WO	Work Order

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## 1. Finding service requests (SRs) assigned to you

- Click on the Service tab along the top of the application interface <sup>1</sup>. You will be taken to the service request screen.
- By default, you will see SRs that are assigned to you based on the **My Service Requests** selection in the visibility drop-down menu <sup>2</sup>.
- By default, it shows you open SRs via the **01-Open SRs** pre-defined query (PDQ) <sup>3</sup>.

The screenshot displays the 'unite iNeed' interface. At the top, there's a navigation bar with 'unite iNeed' logo, menu options (File, Edit, View, Navigate, Query, Tools, Help), and an 'Alerts: 2' indicator. A dropdown menu is set to '01-Open SRs'. Below the navigation, there's a 'Service Request:' section with a 'Service' tab selected. The main area shows a table of service requests under the heading 'My Service Requests'. The table has columns for Form, Agent Priority, SR Identifier, SR Type, Title, Description, Status, Sub Area, Urgency, Assigned To, and Assigned To Group. The first row is highlighted. Below the table, there's a detailed view for the selected SR (RFS-1-2634009714), showing fields for Title, Description, SR Identifier, Assigned To, Status, Sub Area, Urgency, and other metadata.

Form	Agent Priority	SR Identifier	SR Type	Title	Description	Status	Sub Area	Urgency	Assigned To	Assigned To Group
		RFS-1-2634009714		Refresher training request	Please provide refresher training to the UNAMI ICTS SD group	Open	Training	Medium	WELLS, Charles	iNeed Support
		RFS-1-2634009201		New user request	Please refer to the be	Open	User Administration	Medium	WELLS, Charles	iNeed Support
		RFS-1-2633725681		Data integration request.	Enter description here	Open	Application Services	Medium	WELLS, Charles	iNeed Support
		IM-1-2632839087				Open		Medium	WELLS, Charles	MONUSCO COE ...
		RFS-1-2632739471				Open	Mobile Enhancement	Medium	WELLS, Charles	USD Geneva
		IM-1-2632739458				Open		Medium	WELLS, Charles	unite Service Desk
		IM-1-2632739449				Open		Medium	WELLS, Charles	unite Service Desk
		RFS-1-2631783801		Request for: Computer-Test	dcscd	Open	User Administration	Medium	WELLS, Charles	iNeed Support
		RFS-1-2630518219				Open		Medium	WELLS, Charles	FPD-IMU-Helpdesk
		RFS-1-2630518201			This is a test	Open	ICTD Projects	Medium	WELLS, Charles	FPD-IMU-Helpdesk

The detailed view for SR RFS-1-2634009714 shows the following information:

- Title:** Refresher training request
- Description:** Please provide refresher training to the UNAMI ICTS SD group
- SR Identifier:** RFS-1-2634009714
- Assigned To:** WELLS, Charles
- SR Type:** RFS
- Assigned To Group:** iNeed Support
- Status:** Open
- POC Name:** MARLE, Benjamin
- Sub Area:** iNeed
- Sub Area 1:** Training
- Sub Area 2:** Refresher
- Sub Area 3:**
- Impact/Urgency:** Medium / Medium
- Agent Priority:** 3-Medium
- Requested Item:**
- Asset #:**
- Serial #:**
- Asset Description:**
- Actual Start Date:** 29/08/2016 03:03:06 PM
- Created Date:** 25/08/2016 03:03:07 PM
- Target Date:**
- Service Location #:** CS-0811
- Region:** USA - New York

- The bottom half of the screen (**Service Request Details**) shows you the details of the currently selected SR.

## 2. Checking for service requests that were created or should be taken care of today or in the coming week

You can check to see what service requests were created today or have a start date set for today (or within the week).

Usually, the start and creation dates are the same, but the start date can be updated. This may happen, for example, if you need to change it to accommodate the customer's schedule.

- Change the PDQ drop-down menu to **02-Open SRs Starting Today** or **03-Open SRs Starting for the Week** <sup>1</sup> (top right of screen).

The screenshot shows the 'unite iNeed' interface. At the top right, there is an 'Alerts: 2' indicator and a dropdown menu. The dropdown menu is open, showing a list of predefined queries. The second option, '02-SRs Starting Today', is highlighted in blue. A blue callout bubble with the number '1' points to this option. Below the menu, a table of service requests is visible. The table has columns for Form, Agent Priority, SR Identifier, SR Type, Title, Description, Status, Sub Area, and Urgency. Two rows are visible: one for 'Refresher training request' and another for 'New user request'.

- This predefined query will display anything that has an **Actual Start Date** value equal to sometime today or in the next seven days, depending on the PDQ you select.

The screenshot shows the details of a service request with ID 'RFS-1-2634009714'. The title is 'Refresher training request' and the description is 'Please provide refresher training to the UNAMI ICTS SD group'. The status is 'Open'. The 'Actual Start Date' field is highlighted with a red box and contains the value '29/08/2016 03:03:06 PM'. Other fields include 'Assigned To: WELLS, Charles', 'Assigned To Group: iNeed Support', and 'Created Date: 25/08/2016 03:03:07 PM'. The interface also shows various dropdown menus for 'Area', 'Sub Area', and 'Impact/Urgency'.

### 3. Finding service requests assigned to your primary group

All users in iNeed have a primary group for which they do work. This usually is the group that handles requests related to the agent's primary job function (in your case this is most likely the service desk).

- Change the visibility drop-down menu <sup>1</sup> to **My Group's Service Requests**.

The screenshot shows the iNeed Service Requests interface. At the top, there are navigation tabs: Service, Work Order, Employees, Communications, and Administration - User. Below these, there are links for Service Requests Home, Service Requests List, and Service Requests - HelpDesk. A dropdown menu is set to "My Group's Service Requests" with a blue circle and the number "1" next to it. To the right of the dropdown are buttons for "Menu", "New", "Multi-Assign", "My Region", and "Query". Below this is a table of service requests. The table has columns: Form, Agent Priority, SR Identifier, SR Type, Title, Description, Status, Sub Area, Urgency, Assigned To, Assigned To Group, and Actual. A blue arrow labeled "Unassigned" points to the "Assigned To" column. In the "Assigned To" column, the text "Unite Service Desk" is highlighted with a red box.

Form	Agent Priority	SR Identifier	SR Type	Title	Description	Status	Sub Area	Urgency	Assigned To	Assigned To Group	Actual
	Yes	RFS-1-2634167327	Request for new service organization	Please create a new	Open	Application Ser	Unassigned			iNeed Support	09/08
	Yes	RFS-1-2634009201	New user request	Please refer to the be	Open	User Administration	Medium		WELLS, Charles	iNeed Support	04/08
	Yes	RFS-1-2633725681	Data integration request.	Enter description here	Open	Application Services	Medium		WELLS, Charles	iNeed Support	02/08
Yes	Yes	RFS-1-2633603357	Request for: SS Training	test	Pending	Product Defects	Medium			Unite Service Desk	08/08
Yes	Yes	RFS-1-2633603327	Request for: SS Training	SS Training	Pending	Product Defects	Medium			Unite Service Desk	08/08

- The list changes to show SRs that are assigned to your primary group, including ones assigned to you, your colleagues, and SRs that are still unassigned.

**Note:** You may see SRs that are assigned to another group (see red outline in screenshot). A service request will be referenced this way if a work order was assigned to your group under this SR. It will appear as read-only unless you also happen to be part of the SR owner group.

## 4. Checking for unassigned service requests

If you are responsible for managing the service request queue, you will need to check for any service requests that are currently unassigned.

- Select one of the two predefined queries from the PDQ menu on the top right of the screen <sup>1</sup>.

The screenshot shows the unite iNeed interface. At the top right, there is an 'Alerts: 2' indicator. A dropdown menu is open, showing various predefined queries. A callout '1' points to the '04-Unassigned SRs' option, which is highlighted in blue. Below the menu, a table of service requests is visible.

Form	Agent Priority	SR Identifier	SR Type	Title	Description	Status	Sub Area	Urgency
	Green	IM-1-1498607538	Problem logging in to iNeed	I cannot access iNeed	Open	User Issues	Medium	
Yes	Green	RFS-1-1498605857	Service Org renaming request	Please change the se New		Application Services	Medium	

- Make sure you either have **My Group's Service Requests** or **All My Groups' Service Requests** selected in the visibility drop-down menu (above SR list) <sup>2</sup>. **Note: If you have My Service Requests selected, you will not see anything!**

The screenshot shows the unite iNeed interface with the visibility drop-down menu set to 'All My Group's Service Requests'. A callout '2' points to the dropdown menu. Below the menu, a table of service requests is visible.

Form	Agent Priority	SR Identifier	SR Type	Title	Description	Status	Sub Area	Urgency	Assigned To	Assigned To Gr
	Green	IM-1-1498607538	Problem logging in to iNeed	I cannot access iNeed	Open	User Issues	Medium		iNeed Support	
Yes	Green	RFS-1-1498605857	Service Org renaming request	Please change the se New		Application Services	Medium		iNeed Support	

## 5. Finding service requests assigned to all groups you are a member of (optional)

Some agents are part of more than one group, depending on their work responsibilities.

**Example:** Somebody that works for the ICT Service Desk may also be part of the Tier 2 desk-side support team.

- Change the visibility drop-down menu **1** to **All My Group's Service Requests**.

Form	Agent	Priority	SR Identifier	SR Type	Title	Description	Status	Sub Area	Urgency	Assigned To	Assigned To Group
		High	RFS-1-2634009714	Request	Refresher training request	Please provide refresher training	Open	Training	Medium	WELLS, Charles	iNeed Support
		High	RFS-1-2634167381	Request	Request for new service organization	Please create a new service organization	Open	Application Services	Medium	CHELAMKURI, Krishna	CRM Tier 3 Support
		High	RFS-1-2634167327	Request	New user request	Please refer to the below link	Open	User Administration	Medium	WELLS, Charles	iNeed Support
		High	RFS-1-2634009201	Request	New user request	Please refer to the below link	Open	User Administration	Medium	WELLS, Charles	iNeed Support
		High	RFS-1-2633725681	Request	Data integration request.	Enter description here	Open	Application Services	Medium	WELLS, Charles	iNeed Support
yes		High	RFS-1-2633326551	Request	Request for: Education Grant Advance	Ed Grant Advance	Open	Benefits and Entitlements	Medium	TONGUNGA MILA	iNeed Support
		High	RFS-1-2632761000	Request	Web Service Test with RFOrgName	Test	Open	Application Services	Medium		CRM Tier 3 Support
		High	RFS-1-2634097921	Request	Web Service Test	Test	Open	Application Services	Medium		CRM Tier 3 Support
		High	RFS-1-2632761180	Request	Web Service Test with RFOrgName	Test	Open	Application Services	Medium		CRM Tier 3 Support

- The list changes to show SRs that are assigned to all of your groups (in this screenshot *iNeed Support*, *CRM Tier 3 Support*, and *eCOE Support*), including ones assigned to you, your colleagues, and SRs that are still unassigned.

## 6. Assigning a service request to yourself/someone else

You can assign an SR to yourself or another team member.

**Note:** The SR must be already submitted.

- Click on the blank **Assigned To** field **1**.

Form	Agent Priority	SR Identifier	SR Type	Title	Description	Status	Sub Area	Urgency	Assigned To	Assigned To Group
	Green	RFS-1-2634167327	Blue	Request for new service organization	Please create a new	Open	Application Services	Medium		iNeed Support
	Green	RFS-1-2634009201	Blue	New user request	Please refer to the be	Open	User Administration	Medium	WELLS, Charles	iNeed Support
	Green	RFS-1-2633725681	Blue	Data integration request.	Enter description her	Open	Application Services	Medium	WELLS, Charles	iNeed Support

- You have two options of how to proceed:
  - Option 1:** Type the agent's last name or index number into the field and tab away to let the system resolve it for you.  
*This option is much faster if there are many team members since it avoids you having to look in a list.*

- Option 2:** Click the lookup (picklist) icon to open the agent list pop-up.



- If the agent is part of more than one team, their name will appear multiple times. Select the entry that is linked to the correct Assigned To Group **2**, and then click **Pick** **3**.

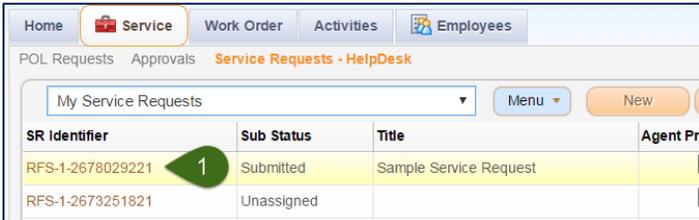
Last Name	First Name	Service Organization	Index #	Mission Badge #	At
TONGUNGA MIL...	Emile	eCOE Support	147856		
TONGUNGA MIL...	Emile	EFMS2 Support	147856		
TONGUNGA MIL...	Emile	ERMS Support	147856		
VALDES	Jonathan	iNeed Support	170433		
VALDES	Jonathan	EFMS2 Support	170433		
VALDES	Jonathan	eCOE Support	170433		
WATANABE	Nobuyoshi	iNeed Support	192205		
WATANABE	Nobuyoshi	EFMS2 Support	192205		
WELLS	Charles	iNeed Support	19905		
WELLS	Charles	eCOE Support	19905		

- The **Assigned To** and **Assigned To Group** fields will reflect your choice.

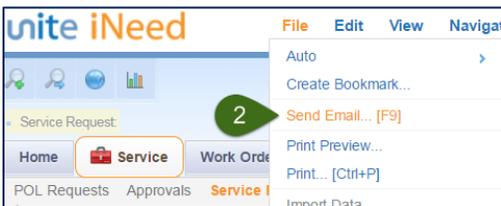
## 7. Emailing the customer

There may be cases when you need to communicate with the client receiving the service. The email should be sent directly from iNeed, not Lotus Notes. This allows for the email and any replies to be tracked by the system.

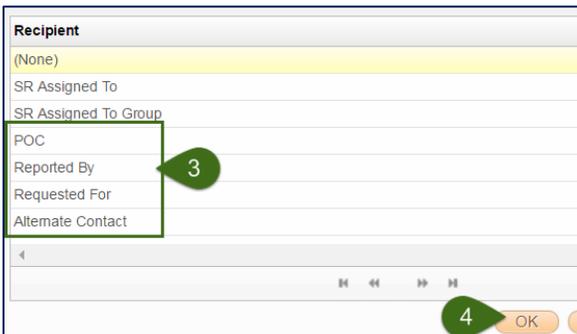
- Drill down into the Service Request **1**.



- Click **File** → **Send Email... [F9]** or press F9 on your keyboard **2**.



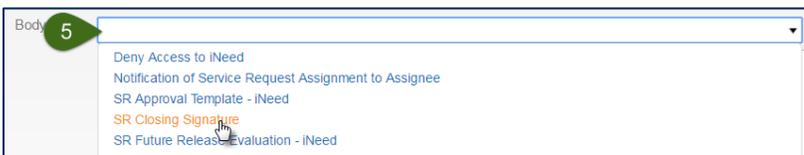
- Select **SR Requested For** **3** and click **OK** **4**.



You have four entries related to the customer(s):

- **POC:** Point of contact for the SR (can be RB or RF)
- **Reported By:** Person who contacted the SD
- **Requested For:** Person whom the service is being requested for
- **Alternate Contact:** If the SR has alternate contact details, select this entry to send to this address
- You can also select **(None)** to leave the address field blank

- Select the appropriate email template from the **Body** drop-down menu **5**. If there is no appropriate template, select the **SR Closing Signature** block to add the signature block and SR reference number.



- Make any necessary changes and click **Send** **6**. You can also add an attachment via the icon. Once sent, the email will appear as an activity in your service request.



## 8. Creating a manual service request

This section shows how to create a simple manual service request.

- Click on the **Service** <sup>1</sup> tab, then **New** <sup>2</sup>.

The screenshot shows the top navigation bar with the 'Service' tab highlighted. Below it, there's a search bar and several buttons: 'New', 'Multi-Assign', 'My Region', and 'Query'. The 'New' button is circled with a blue callout '2'. The 'Service' tab is circled with a blue callout '1'.

- Enter a **Title** <sup>3</sup> and **Description** <sup>4</sup>.

The screenshot shows the 'Title' and 'Description' input fields. The 'Title' field has a placeholder 'Enter title here.' and is circled with a blue callout '3'. The 'Description' field has a placeholder 'Enter description here.' and is circled with a blue callout '4'.

- Enter the last name or index number in **POC Name** <sup>5</sup>. You can also click on the  icon to search for a client <sup>6</sup>.

The screenshot shows the 'POC Name' field with the value '19905' and a search icon. A blue callout '5' points to the search icon.

OR

The screenshot shows the 'POC Name' field with the value '19905' and a search icon. A blue callout '6' points to the search icon.

iNeed will resolve the client details for you automatically.

- Pick the **SR Type** <sup>7</sup> and categories <sup>8</sup>.

The screenshot shows the 'SR Type' dropdown menu with 'RFS' selected. A blue callout '7' points to the dropdown. To the right, there are several dropdown menus for 'Area', 'Sub Area', and 'Sub Area 1'. A blue callout '8' points to these dropdowns. A text box lists SR types: RFS (Request for Service), Incident (Break/Fix), and Problem (Used for Problem Management).

- Click **Submit** <sup>9</sup> to finish the process.

The screenshot shows the 'Submit' button in the bottom navigation bar, circled with a blue callout '9'.

## 9. Monitoring emails

Part of the service desk responsibility is to monitor inbound and outbound communications to clients.

- Click on the Communications tab along the top of the application interface **1**. You will be taken to the communication (email) screen.
- By default:
  - You will see emails that are assigned to your primary group based on the selection in the visibility drop-down menu **2**.
  - It shows you unread emails via the **01-Inbox - Unread** pre-defined query (PDQ) **3**.

Attachment	Message Received	Status	From	Last Name	First Name	Subject	SR #	WO Identifier	Assigned To	Assit
	25/04/2016 02:46:54 PM	Not Started	chelamkuri@un.org	ADMINISTRATOR	APP	Re: UAT: WO ID: WO-I...		WO-IM-1-175007...		i
	25/04/2016 02:45:22 PM	Not Started	pebbana@un.org	PEBBANA	Srikanth	Re: UAT: WO ID: WO-I...		WO-IM-1-175007...		i
	25/04/2016 11:45:51 AM	Not Started	pebbana@un.org	PEBBANA	Srikanth	Re: UAT: Service Req...	IM-1-1750041988			i
	21/04/2016 03:27:37 PM	Not Started	ungsc-rms-bo@un.org			UAT: SR ID: IM-1-174...	IM-1-1749346811			i
	21/04/2016 03:25:03 PM	Not Started	pebbana@un.org			Re: UAT: SR ID: IM-1...	IM-1-1749346811			i
	21/04/2016 03:24:05 PM	Not Started	pebbana@un.org	PEBBANA	Srikanth	Re: UAT: SR ID: IM-1...	IM-1-1749346811			i
	21/04/2016 02:44:48 PM	Not Started	pebbana@un.org	PEBBANA	Srikanth	Re: UAT: WO ID: WO-I...		WO-IM-1-174968...		i
	21/04/2016 02:44:47 PM	Not Started	pebbana@un.org	PEBBANA	Srikanth	Re: UAT: WO ID: WO-I...		WO-IM-1-174968...		i
	21/04/2016 02:36:40 PM	Not Started	pebbana@un.org	PEBBANA	Srikanth	Re: UAT: WO ID: WO-I...		WO-IM-1-174968...		i
	18/04/2016 03:39:46 PM	Not Started	ineed-uat3@un.org			hey mama		WO-RFS-1-17493...		i

- After review, you can change the **Status** to closed or cancel for an email.
- If there is no **SR #** or **WO Identifier** value, the email is new and not related to an existing SR. See [Creating a service request from an email](#) for the steps to create a new SR from an email.
- You can also reply, reply all or forward an email.
- The bottom half of the screen displays the email body, and a tab for all of the attachments in the email.

Re: UAT: WO ID: WO-IM-1-1750077624

From: chelamkuri@un.org  
 To: ineed-uat@un.org  
 Subject: Re: UAT: WO ID: WO-IM-1-1750077624  
 Received Date: 04/25/2016 14:46:54

Thank you,  
 Kranthi Chelamkuri  
 OICT/RMS, United Nations  
 CS-0807E  
 Office: 212.963.0502  
 Mobile: 619.200.2009  
 Email: chelamkuri@un.org

## 10. Creating a service request from an email

You can create an SR from an email that is not already associated with an existing SR or WO.

- Go to the **Communications** <sup>1</sup> tab. If the email has no **WO Identifier** or **SR#** value <sup>2</sup>, highlight the email and click on **Create New SR** <sup>3</sup> to auto-generate and SR and associate the email to it.

To	From	Last Name	First Name	Message Received	Subject	WO Identifier	SR #	Status	Assi
ineed-UAT3 <ineed-ua...	koduri@un.org	KODURI	Hemant Venkata	18/04/2016 03:41:49 PM	hello			Not Started	iNee

- Different values from the email will populate SR fields:
  - Subject = Title
  - Body = Description
  - Sender = POC Name
  - Source also gets pre-populated with Email (and turned read-only)

**RFS-1-2634009201**

Menu New Delete Query Submit Apply Template Quick Close

Title: hello

Description: thanks-Hemant

DM/OICT/RMS, CS-0810

SR Identifier: RFS-1-2634009201

Assigned To: WELLS, Charles

SR Type: RFS

Assigned To Group: iNeed Support

Status: Open

POC Name: KODURI, Hemant Venkata

Sub Status: Unassigned

Auto-Email to POC:  koduri@un.org

Source: Email

POC Phone: 6225

Area: iNeed

Sub Area:

Sub Area 1:

Sub Area 2:

Sub Area 3:

Impact/Urgency: Medium Medium

Agent Priority: 3-Medium

Service Location #: CS-0819E

- Add the categories by selecting the correct **SR Type** <sup>4</sup> and **Area/Sub Area/1/2/3** <sup>5</sup> values. Click **Submit** <sup>6</sup> to finalise the SR.

Menu New Delete Query Submit <sup>6</sup> Apply Template Quick Close

Title: hello

Description: thanks-Hemant

DM/OICT/RMS, CS-0810

SR Identifier: RFS-1-2634009201

Assigned To: WELLS, Charles

SR Type: RFS <sup>4</sup>

Assigned To Group: iNeed Support

Status: Open

POC Name: KODURI, Hemant Venkata

Area: iNeed

Sub Area: Application Services

Sub Area 1: Data Integration

Sub Area 2:

Sub Area 3:

Impact/Urgency: Medium Medium

Agent Priority: 3-Medium

Service Location #: CS-0819E

## 11. Assigning multiple emails at once

You may need to assign multiple emails to yourself or another agent.

- In the communications screen, highlight the records you wish to reassign.
- Click the **Multi-Assign** button.

My Group's Communications

Activity #	SR #	WO Identifier	Attach	Message Received	Status	From	Last Name	First Na
1-UQKPPD	RFS-1-1858581621			21/10/2017 03:51:16 AM	Not Started	do-not-reply@un.org		
1-UQJ5	RFS-1-1858524129			20/10/2017 03:50:57 AM	Not Started	do-not-reply@un.org		
1-UPYGSV	RFS-1-1855403702			18/10/2017 03:51:30 AM	Not Started	do-not-reply@un.org		
1-UPUGGZ		WO-RFS-1-1857339522		18/10/2017 02:25:00 AM	Not Started	unsmis@unog.ch		
1-UPU2AX		WO-RFS-1-1857339890		18/10/2017 02:24:43 AM	Not Started	unsmis@unog.ch		
1-UPU2AS		WO-RFS-1-1855454154		18/10/2017 02:24:43 AM	Not Started	unsmis@unog.ch		
1-UPU2B3		WO-RFS-1-1855453970		18/10/2017 02:24:43 AM	Not Started	unsmis@unog.ch		
1-UPU29I		WO-RFS-1-1857339338		18/10/2017 02:24:43 AM	Not Started	unsmis@unog.ch		
1-UPU2C9		WO-RFS-1-1855453785		18/10/2017 02:24:43 AM	Not Started	unsmis@unog.ch		
1-UPU2CW		WO-RFS-1-1857339706		18/10/2017 02:24:43 AM	Not Started	unsmis@unog.ch		

- In the pop-up window, look for the user to whom the communications should be assigned. **Note:** If the user is part of multiple groups, several entries will appear. Ensure you select the appropriate group.
- Click **Pick**.

Pick Service Agent

My Group Query Find: User ID Starting with: SPEB Go

1 - 4 of 4

User ID	First Name	Last Name	Service Organizatic	Email	Index #
SPEBBANA	Srikanth	PEBBANA	EIDMS Support	pebbana@un.org	
SPEBBANA	Srikanth	PEBBANA	iNeed Production S...	pebbana@un.org	3
SPEBBANA	Srikanth	PEBBANA	OICT RFS Group	pebbana@un.org	
SPEBBANA	Srikanth	PEBBANA	CRM Tier 3 Support	pebbana@un.org	

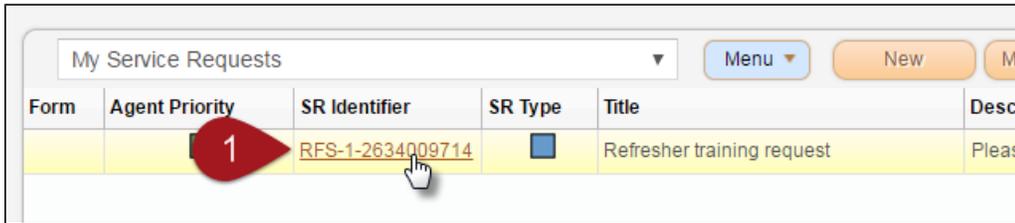
Pick Cancel

- The emails are assigned.

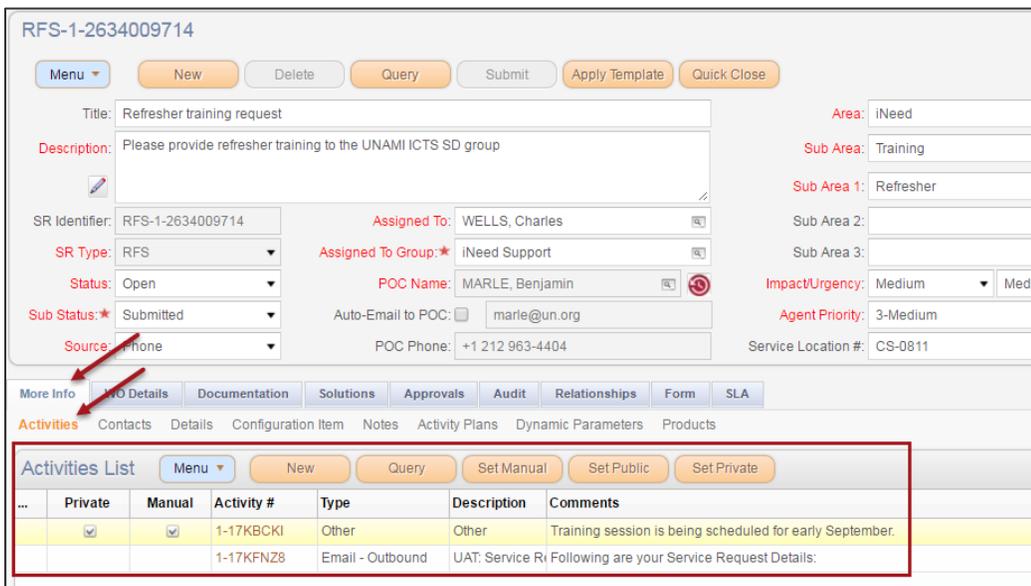
## 12. Adding a note to a service request

You may wish to add a note to a service request indicating what you did or what the current status is. In iNeed, this is called an activity.

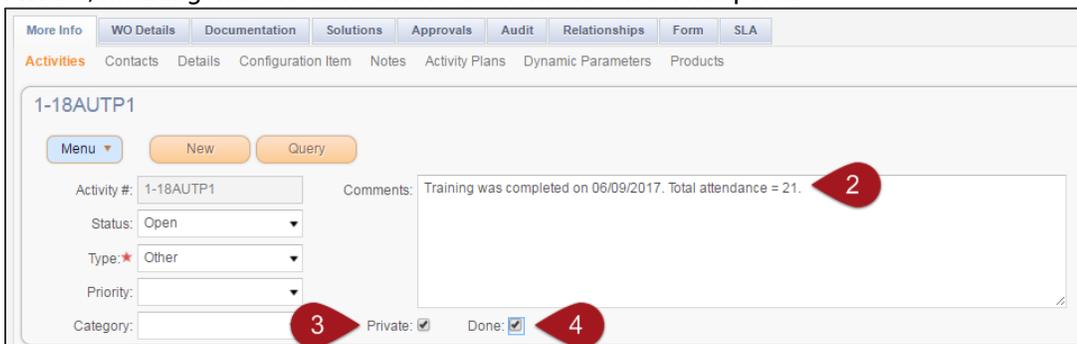
- To add an activity, go into the service request by clicking the **SR Identifier** link **1**.



- You will find activities on the bottom half of the service request screen. It is the sub-tab that is displayed by default when entering the service request view.



- Click on the **New** button to create a new activity.
- Enter the note in the Comments section **2** and click on the **Done** checkbox **3**. You can also mark an activity as **Private**, meaning that the client will not see it in the self-service portal **4**.



- Click somewhere on the top half of the screen or press **Ctrl+S** on your keyboard to save and close the note.

### 13. Seeing a client's SR history

Sometimes, you may wish to see the client's previous SRs (for your Master Org only).

- Click on the  icon to see the client history **1**.

RFS-1-2633725681

Menu ▾ New Delete Query Submit Apply Template Quick Close

Title: Enter title here.

Description: Enter description here.

SR Identifier: RFS-1-2633725681

Assigned To: WELLS, Charles

SR Type: RFS

Assigned To Group: iNeed Support

Status: Open

POC Name: WELLS, Charles **1**

Sub Status: Unassigned

Auto-Email to POC:  wells@un.org

Source: Phone

POC Phone: +1 917 367-3153

- The SR history of the POC will be shown. It sorts them based on when the SR was last updated. You can click on the SR number of any of the records to drill down into that particular SR **2**.

To simply go back to the current SR, click **Close** **3**.

SR History

Query Find SR Identifier| Starting with  Go

1 - 10 of 10+

SR Identifier	Title	SR Type	Status	Sub Status	Area
RFS-1-2633725681	...ration re...	RFS	Open	Submitted	iNeed
RFS-1-1743426456	New workflow req...	RFS	Open	Submitted	eCOE
RFS-1-1744437826	Employee organiz...	RFS	Open	Submitted	iNeed
RFS-1-1744437811	Data integration re...	RFS	Open	Submitted	iNeed
RFS-1-1744437845	Activity template u...	RFS	Open	Submitted	iNeed
RFS-1-1744437866	Request for new a...	RFS	Open	Submitted	iNeed
IM-1-1746908151	User receives an e...	Incident	Open	Submitted	iNeed
RFS-1-1746908184	User cannot log in ...	RFS	Open	Assigned	iNeed
RFS-1-1749032459	Request for enhan...	RFS	Open	Submitted	iNeed
RFS-1-2631783801	Request for: Com...	RFS	Open	Submitted	iNeed

**2**

**3** Close

## 14. Looking at service request attachments

Sometimes there are attachments as part of your service request.

- From within the service request, click on the **Documentation** <sup>1</sup> tab to see service request (and service request) attachments.

The screenshot displays the iNeed service request interface for request ID RFS-1-2634009714. The 'Documentation' tab is selected and highlighted with a blue circle and the number '1'. Below the main form, the 'Attachments' section shows a table of service request attachments.

Attachment Name	Size (In Bytes)	Type	Modified	Update File	Comments
iNeed Primary & Secondary Mana...	79,918	xlsx	29/08/2016 03:3...	<input checked="" type="checkbox"/>	

## 15. Adding an attachment to a service request

You can add your own attachments to a service request.

- In the service request, click on **Documentation** <sup>1</sup>.
- Click on **New File** <sup>2</sup>.

The screenshot shows the iNeed service request interface for request RFS-1-2634009714. The 'Documentation' tab is selected, and the 'Attachments' section shows a table with one existing attachment. An 'Open' file dialog is open, showing the 'Desktop' folder with several files. The file 'RSCE MONUSCO Catalogue' is selected. The 'File name' field in the dialog contains 'RSCE MONUSCO Catalogue' and the file type is set to 'All Files'. The 'Open' button is highlighted.

Attachment Name	Size (In Bytes)	Type	Modified	Update File	Comments
iNeed Primary & Secondary Mana...	79,918	xlsx	29/08/2016 03:3...	<input checked="" type="checkbox"/>	

- Select the file <sup>3</sup>. You can select multiple at the same time if needed.
- Click **Open** to complete the process <sup>4</sup>.

**Note:** If you are using Google Chrome or Mozilla Firefox, you can drag and drop the files into the **SR Attachments** area to add them.

## 16. Viewing the form associated with a service request

Requests originating from self-service can have a form associated with it. This is indicated by the **Yes** value under the **Form** column in the SR list view. To see the form details:

- Drill down into the SR
- Click on the **Form** sub-tab **1**.

SR Identifier: RFS-1-1748572801  
 SR Type: RFS  
 Status: Open  
 Sub Status: Submitted  
 Source: Web  
 Assigned To: WELLS, Charles  
 Assigned To Group: CRM Tier 3 Support  
 POC Name: GANGULY, Amitava  
 Auto-Email to POC: ganguly@un.org  
 POC Phone: +1917367-3056  
 Sub Area 2:  
 Sub Area 3:  
 Impact/Urgency: M  
 Agent Priority: 3-  
 Service Location #: C

More Info | WO Details | Documentation | Solutions | Approvals | Audit | Relationships | **Form** | SLA

Activities | Contacts | Details | Configuration Item | Notes | Activity Plans | Dynamic Parameters | Products

Activities List

Private	Manual	Activity #	Type	Description	Comments
		1-SX20YM	Email - Outbound	UAT: Service Request has been assigned to you. SR Following are your Service Re	
		1-SX20ZD	Email - Outbound	UAT: Service Request Submission Notification - SR IC United	
		1-SX20YW	Email - Outbound	UAT: New Service Request created through Self Ser Following are your Service Re	

- Click on the **Click here to view the Form** link **2**.

Form Submitted: Change Request Form  
 Form Status: This form has been submitted successfully.  
 Click here to view the Form  
 Unlock Form and Notify Customer

- The form will display. You can hit the **Back** browser button or the **breadcrumb** link to return to the SR.

https://crmuat.un.org/epublicsector\_enu/start.swe?SWECmd=GotoView&SWEView=UNIN+Form+Detail+View&SWERF=1&SWEHo

unite iNeed

Service Request: RFS-1-1748572801

Forms

Instructions  
 SR#: RFS-1-1748572801

United Nations Nations Unies  
 iNeed Change Request Form  
 Unite Service Desk

REQUESTOR	REQUESTING FOR	
Name: Amitava GANGULY	First Name: Amitava	Last Name: GANGULY
Email: ganguly@un.org	Index: 94328	Email: ganguly@un.org
Phone: +1917367-3056	Phone: +1917367-3056	Location: CS-0865
	Organization: DM/OICT	Service/Section: dm oict amd rms

- **Optional:** If the form is incomplete, you can reject it and send it back to the client for resubmission. Click on **Unlock Form and Notify Customer**. An email screen will open allowing you to compose and send a rejection email. The more common approach is to

Details | Documentation | Solutions | Approvals | Audit | R

id: Change Request Form  
 us: This form has been submitted successfully.  
 ew the Form  
 Unlock Form and Notify Customer

## 17. Resolving a service request

Once all of the work orders and/or all actions have been completed, **and you wish to give the client time to review the request and respond to the SD prior to closure**, you will want to change the status of the SR to **Resolved**. For complete closure of the SR, please see [Closing a service request](#).

In order to resolve a service request, **and have it auto-close after a predetermined number of days**, four requirements need to be fulfilled:

1. The service request needs to be assigned to someone (see Assigning a service request to yourself/someone else).
2. There needs to be a “manual” activity.
3. All activities within the service request must be closed or cancelled.
4. All work orders (if applicable) in the service request must all be closed or cancelled.

### What is a manual activity?

A manual activity is any activity that is not generated by the system, be it an email you sent from the service request (see [Emailing the customer](#)), or just a note that you added to indicate what you did (see Assigning multiple emails at once). You may need to assign multiple emails to yourself or another agent.

In the communications screen, highlight the records you wish to reassign.

Click the **Multi-Assign** button.

Activity #	SR #	WO Identifier	Attach	Message Received	Status	From	Last Name	First Na
1-UQKPPQ	RFS-1-1858581621			21/10/2017 03:51:16 AM	Not Started	do-not-reply@un.org		
1-UQJ5	RFS-1-1858524129			20/10/2017 03:50:57 AM	Not Started	do-not-reply@un.org		
1-UPYGSV	RFS-1-1855403702			18/10/2017 03:51:30 AM	Not Started	do-not-reply@un.org		
1-UPUGGZ		WO-RFS-1-1857339522		18/10/2017 02:25:00 AM	Not Started	unsmis@unog.ch		
1-UPU2AX		WO-RFS-1-1857339890		18/10/2017 02:24:43 AM	Not Started	unsmis@unog.ch		
1-UPU2AS		WO-RFS-1-1855454154		18/10/2017 02:24:43 AM	Not Started	unsmis@unog.ch		
1-UPU2B3		WO-RFS-1-1855453970		18/10/2017 02:24:43 AM	Not Started	unsmis@unog.ch		
1-UPU29I		WO-RFS-1-1857339338		18/10/2017 02:24:43 AM	Not Started	unsmis@unog.ch		
1-UPU2C9		WO-RFS-1-1855453785		18/10/2017 02:24:43 AM	Not Started	unsmis@unog.ch		
1-UPU2CW		WO-RFS-1-1857339706		18/10/2017 02:24:43 AM	Not Started	unsmis@unog.ch		

In the pop-up window, look for the user to whom the communications should be assigned. **Note:** If the user is part of multiple groups, several entries will appear. Ensure you select the appropriate group.

Click **Pick**.

Pick Service Agent

My Group Query Find: User ID Starting with: SPEB Go

1 - 4 of 4

User ID	First Name	Last Name	Service Organizatic	Email	Index #
SPEBBANA	Srikanth	PEBBANA	EIDMS Support	pebbana@un.org	
SPEBBANA	Srikanth	PEBBANA	iNeed Production S...	pebbana@un.org	3
SPEBBANA	Srikanth	PEBBANA	OICT RFS Group	pebbana@un.org	
SPEBBANA	Srikanth	PEBBANA	CRM Tier 3 Support	pebbana@un.org	

4 Pick Cancel

The emails are assigned.

Adding a note to a service request).

### I have done all that? Now what?

Change the **Status** to **Resolved** <sup>1</sup>.

RFS-1-2634009201

Menu ▾ New Delete Query Submit Apply Template Quick Close

Title: New user request

Description: Please refer to the below  
 DM/OICT/RMS, CS-0810  
 Office: 212-963-5019

SR Identifier: RFS-1-2634009201 Assigned To: WELLS, Charles

SR Type: RFS Assigned To Group:★ iNeed Support

Status: Resolved <sup>2</sup> POC Name: KODURI, Hemant Venkata

Sub Status:★ Completed Auto-Email to POC:  koduri@un.org

Source: Email POC Phone: 6225

That's it. The SR will automatically be closed by the system. How long depends on your configuration. Check with your iNeed focal point or manager.

## 18. Closing a service request

Once all of the work orders and/or all actions have been completed, **and you are certain the client is satisfied with the result**, you will want to close the service request to remove it from your queue. If uncertainty remains about client satisfaction, please see [Resolving a service request](#).

In order to close a service request, four requirements need to be fulfilled:

5. The service request needs to be assigned to someone (see [Assigning a service request to yourself/someone else](#)).
6. There needs to be a “manual” activity.
7. All activities within the service request must be closed or cancelled.
8. All work orders (if applicable) in the service request must all be closed or cancelled.

### What is a manual activity?

A manual activity is any activity that is not generated by the system, be it an email you sent from the service request (see [Emailing the customer](#)), or just a note that you added to indicate what you did (see [Assigning multiple emails at once](#)). You may need to assign multiple emails to yourself or another agent.

In the communications screen, highlight the records you wish to reassign.

Click the **Multi-Assign** button.

The screenshot shows the 'Communications' tab in the Service Desk Agent interface. The 'Multi-Assign' button is highlighted with a blue circle containing the number '2'. The table below shows a list of communications with columns for Activity #, SR #, WO Identifier, Attach, Message Received, Status, From, Last Name, and First Name. The first row is highlighted with a blue circle containing the number '1'.

Activity #	SR #	WO Identifier	Attach	Message Received	Status	From	Last Name	First Name
1-UQKPPD	RFS-1-1858581621			21/10/2017 03:51:16 AM	Not Started	do-not-reply@un.org		
1-UQJ5	RFS-1-1858524129			20/10/2017 03:50:57 AM	Not Started	do-not-reply@un.org		
1-UPYGSV	RFS-1-1855403702			18/10/2017 03:51:30 AM	Not Started	do-not-reply@un.org		
1-UPUGGZ		WO-RFS-1-1857339522		18/10/2017 02:25:00 AM	Not Started	unsmis@unog.ch		
1-UPU2AX		WO-RFS-1-1857339890		18/10/2017 02:24:43 AM	Not Started	unsmis@unog.ch		
1-UPU2AS		WO-RFS-1-1855454154		18/10/2017 02:24:43 AM	Not Started	unsmis@unog.ch		
1-UPU2B3		WO-RFS-1-1855453970		18/10/2017 02:24:43 AM	Not Started	unsmis@unog.ch		
1-UPU29I		WO-RFS-1-1857339338		18/10/2017 02:24:43 AM	Not Started	unsmis@unog.ch		
1-UPU2C9		WO-RFS-1-1855453785		18/10/2017 02:24:43 AM	Not Started	unsmis@unog.ch		
1-UPU2CW		WO-RFS-1-1857339706		18/10/2017 02:24:43 AM	Not Started	unsmis@unog.ch		

In the pop-up window, look for the user to whom the communications should be assigned. **Note:** If the user is part of multiple groups, several entries will appear. Ensure you select the appropriate group.

Click **Pick**.

Pick Service Agent

My Group Query Find: User ID Starting with: SPEB Go

1 - 4 of 4

User ID	First Name	Last Name	Service Organizatic	Email	Index #
SPEBBANA	Srikanth	PEBBANA	EIDMS Support	pebbana@un.org	
SPEBBANA	Srikanth	PEBBANA	iNeed Production S...	pebbana@un.org	3
SPEBBANA	Srikanth	PEBBANA	OICT RFS Group	pebbana@un.org	
SPEBBANA	Srikanth	PEBBANA	CRM Tier 3 Support	pebbana@un.org	

4 Pick Cancel

The emails are assigned.

Adding a note to a service request).

### I have done all that? Now what?

Click **Quick Close** <sup>1</sup>.

RFS-1-2634009714

Menu New Delete Query Submit Apply **1** Quick Close

Title: Refresher training request

Description: Please provide refresher training to the UNAMI ICTS SD group

If needed, you can also specify a **Sub Status** <sup>2</sup> after you close the service request.

Menu New Delete Query Submit Apply Template Quick Close

Title: Refresher training request

Description: Please provide refresher training to the UNAMI ICTS SD group

SR Identifier: RFS-1-2634009714 Assigned To: WELLS, Charles

SR Type: RFS Assigned To Group: iNeed Support

Status: Closed POC Name: MARLE, Benjamin

Sub Status: **Completed** <sup>2</sup> Auto-Email to POC: marle@un.org

Source: Completed POC Phone: +1 212 963-4404

More Info W Solutions Approvals Audit Relationships Form SLA

Activities C Configuration Item Notes Activity Plans Dynamic Parameters Products

## 19. Cancelling a service request

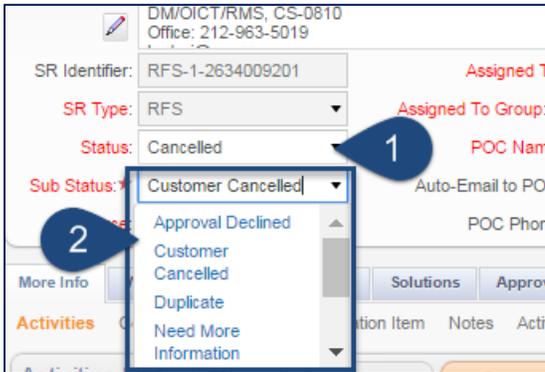
What if you are cancelling or rejecting a request because the customer cancelled or the client is not eligible for the product or service?

In order to cancel a service request, two requirements need to be fulfilled:

1. The service request needs to be assigned to someone (see Assigning a service request to yourself/someone else).
2. All activities within the service request must be closed or cancelled.

### OK, then what?

Change the **Status** to **Cancelled** <sup>1</sup> and then specify one of the **Sub-Status** values as a reason (optional) <sup>2</sup>.



Please note that if you select **Rejected** as the Sub Status, an email will be sent to the client notifying them of the rejection.

## 20. Checking for unsubmitted SRs

There are several cases where SRs are unsubmitted:

1. The SR is coming from a self-service catalogue item where the process flow does not automatically submit it.
2. A web service has generated the SR.
3. An agent creates an SR (from email or manually) and forgets to submit it.

You can check for unsubmitted SRs to either submit or delete them.

- From the SR view, select the PDQ **10-Unsubmitted SRs** <sup>1</sup>.

Form	Agent	Priority	SR Identifier	SR Type	Title	Description	Status	Sub Area	Urgency
		High	RFS-1-2634167327	Request	Request for new service organization	Please create a new	Open	Application Services	Medium
		High	RFS-1-2633725681	Request	Data integration request.	Enter description here	Open	Application Services	Medium
Yes		High	RFS-1-2633603357	Request	Request for: SS Training	test	Pending	Product Defects	Medium

- You will be shown all of the SRs that are not yet submitted. At this point, you have the option to either submit or delete the SR. **Please note that deletion of valid requests is not advised as it will impact client satisfaction and the timely resolution of incidents and requests.**

## 21. Creating a work order (WO)

Escalation of requests to a tier 2 or 3 team is part of standard service operations where a service desk agent is unable to resolve on first contact. Many requests, in particular those coming from self-service, already apply work order templates automatically.

In some cases, you as a service desk agent will need to escalate a ticket manually to an escalation team.

- From the SR screen, go to the **WO Details** sub-tab **1**. You will see the work order list, including any existing work orders that are already part of the SR.
- Click on **New** on the Work Order List view **2**.

The screenshot shows the 'Service Requests - HelpDesk' interface for SR RFS-1-2633725681. The 'WO Details' sub-tab is selected, indicated by a blue circle with the number '1'. Below the sub-tab, there is a 'Work Order List' section with a 'New' button highlighted by a blue circle with the number '2'. The main form area contains fields for Title, Description, SR Identifier, SR Type, Status, Sub Status, Source, Assigned To, Assigned To Group, POC Name, Auto-Email to POC, POC Phone, Area, Sub Area, Sub Area 1, Sub Area 2, Sub Area 3, Impact/Urgency, Agent Priority, and Service Location #.

- Update the *Description* and the *Assigned To/Assigned To Group* fields.
  - If you want to assign the WO to an agent, change *Assigned To* (only works for groups in your master org).
  - If you want to assign the WO to a group, change *Assigned To Group*. The agent field will be blank (or will be set to the primary contact for the group if she exists).

Seq #	Priority	WO Identifier	Description	Status	Category	Service Location	Assigned To	Assigned To Group	Actual Start Date	RF Last Name	RF First Name
		WO-RFS-1-26341...	Please assist the client	Transfer	Other	CS-0811		CRM Tier 3 Support	31/08/2016 11:...	WELLS	Charles

## 22. Checking for SRs where all the work orders are closed/no work orders exist

As a service desk agent, you are responsible for ensuring that requests are completed and resolved. Automatic resolution **can** be enabled for self-service items, but all other request avenues still require you to actively monitor and resolve your requests.

This includes both SRs where all the work orders are closed/cancelled, and SRs that never had work orders to begin with.

In order to do so, a PDQ exists that will let you quickly filter for these requests.

- From the PDQ list, click on **08-SRs with 0 WO Remaining** <sup>1</sup>.

The screenshot shows the unite iNeed interface. At the top, there's a navigation bar with 'File', 'Edit', 'View', 'Navigate', 'Query', 'Tools', and 'Help'. Below that, there's a 'Service Request' section with tabs for 'Service', 'Work Order', 'Employees', 'Communications', 'Administration - User', and 'Administration - Group'. A dropdown menu is open on the right side, showing a list of filters. The filter '08-SRs with 0 WO Remaining' is highlighted in blue. A blue circle with the number '1' is placed over this filter. Below the menu, there's a table with columns: Form, Agent, Priority, SR Identifier, SR Type, Title, Description, Status, Sub Area, Urgency, and Assignee. The table contains three rows of data.

- This will filter out all SRs that still have open WOs.

The screenshot shows the unite iNeed interface with the details of a service request (RFS-1-2633326334). At the top right, a dropdown menu shows '08-SRs with 0 WO Remaining' selected, with a blue arrow pointing to it. Below the menu, there's a 'Work Order List' table with columns: Seq #, Priority, WO Identifier, Description, Status, Category, Service Location, Assigned To, Assigned To Group, Actual Start Date, RF Last Name, and RF First Name. The table contains two rows of data, both with a status of 'Closed'. Below the table, there's a 'More Info' section with tabs for 'WO Details', 'Documentation', 'Solutions', 'Approvals', 'Audit', 'Relationships', 'Form', and 'SLA'.

- If it is deemed appropriate to resolve the request, you can follow the steps for [Resolving a service request](#) or [Closing a service request](#).

## 23.Waiting on a response (changing service request status to pending)

Sometimes, you may need either your client or a third party to get back to you with some more information before you are able to proceed.

After you send a query to the other party and are waiting for a response (see *Emailing the customer*), you can change the status **1** of the work order to **Pending** and the sub-status **2** to whatever best represents the reason for the delay.

RFS-1-2633725681

Menu ▾ New Delete Query Submit Apply Template Quick Close

Title: Data integration request.

Description: Enter description here.

SR Identifier: RFS-1-2633725681 Assigned To: WELLS, Charles

SR Type: RFS Assigned To Group: iNeed Support

Status: Pending **1** POC Name: WELLS, Charles

Sub Status: **2** Waiting on Customer

Auto-Email to POC:  wells@un.org

POC Phone: +1 917 367-3153

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Activities

Escalated

## 24. Informing the client of service request resolution

### **Informing the client:**

*It should not be necessary to inform the client about the SR resolution. Generally, the system will do so automatically, but in certain cases you may be required to send a separate notification to the client. Please refer to your internal business processes to determine the proper SOP.*

*In cases where it is deemed necessary to inform the client directly, please refer to [Emailing the customer](#) in this document.*

## 25. Applying an work order template

Some SRs already have work order templates associated with them. This template will automatically create all the work orders for you. A lot of self-service items have templates, but some manual templates can also be applied. Please check your SOPs or ask your iNeed focal point if you are unsure which SRs have templates.

- Templates are associated to the request categories (Area/Sub Area/Sub Area 1/2/3) and the Assigned To Group of the request.
- Click **Apply Template** to generate the work orders in the SR **1**.

Service Requests Home Service Requests List Service Requests - HelpDesk

RFS-1-2634481811

Menu New Delete Query **1** Apply Template Quick Close

Title: Please remove agent JSMITH1  
 Description: Please remove JSMITH1 from OICT RFS Group. User no longer functions as an iNeed agent.

SR Identifier: RFS-1-2634481811 Assigned To: WELLS, Charles  
 SR Type: RFS Assigned To Group: \* iNeed Support  
 Status: Open POC Name: SMITH, Jonas  
 Sub Status: \* Submitted Auto-Email to POC: --jsmith1@un.org  
 Source: Phone POC Phone: 12345678

Area: iNeed  
 Sub Area: User Administration  
 Sub Area 1: Remove Agent  
 Sub Area 2:  
 Sub Area 3:  
 Impact/Urgency: Medium Medium  
 Agent Priority: 3-Medium  
 Service Location #:

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Activities List Menu New Query Set Manual Set Public Set Private

Private	Manual	Activity #	Type	Description	Comments	Status	Actual Start
---------	--------	------------	------	-------------	----------	--------	--------------

- You will message indicating how many WOs were generated.

crmuat.un.org says:

Total WOs created: 2

Prevent this page from creating additional dialogs.

OK

- Go to the **WO Details** tab to review the work orders (optional).

More Info WO Details **2** Documentation Solutions Approvals Audit Relationships Form SLA

Work Orders All WO Activities Sales Orders

Work Order List Menu New Delete Query GenRep WO Close WO Multi-Copy Work Order List

Seq #	Priority	WO Identifier	Description	Status	Category	Service Location	Assigned To	Assigned To Group	Actual Start Date	RF Last Name	RF First Name
1		WO-RFS-1-26344...		Open	Other		WELLS, Charles	iNeed Support	31/08/2016 12:39:...	SMITH	Jerry
2		WO-RFS-1-26344...		Transfer	Other			EIDMS Support	31/08/2016 12:39:...	SMITH	Jerry

## 26. Reassigning a service request to another Assigned To Group

iNeed allows you to reassign a service request to another group.

This can be achieved by simply changing the **Assigned To** <sup>1</sup> or **Assigned To Group** <sup>2</sup> values.

RFS-1-2634481811

Menu ▾ New Delete Query Submit Apply Template Quick Close

Title: Please remove agent JSMITH1

Description: Please remove JSMITH1 from OICT RFS Group. User no longer functions as an iNeed agent.

SR Identifier: RFS-1-2634481811 <sup>1</sup> Assigned To: WELLS, Charles

SR Type: RFS Assigned To Group: ★ iNeed Support <sup>2</sup>

Status: Open POC Name: SMITH, Jonas Impact

**Note:** For reassignment to another agent within your master organization, please see *Assigning a service request to yourself/someone else*.

**Important:** Please make sure to only reassign service requests if you support processes/SOPs permit such actions.

Some very important things to remember before reassigning to another group:

- If you reassign an SR to a group you are not a part of, it will immediately become read-only and will prevent you from further updating the request!
- Make sure to fill in all the pertinent information and submitting the request before you reassign it to the other group. This way, you can be sure that you are not assigning incomplete SRs.
- You cannot assign it to a specific agent within a group you are not a part of.

## 27. Changing a list view layout

You can update any list view in iNeed, meaning that you can add/remove columns and resize them to your liking.

Since there are a number of different options, please refer to [Navigation & Basics](#) (page 10) for more details.

## 28. Moving between service requests

If you are in the service request details view, you can navigate between records by using the previous/next record arrows on the top right of the screen.

The order of the SRs, as well as which records appear, is determined by the visibility and PDQ from the list view screen.

The screenshot shows the 'Service Request' details page. At the top, there are tabs for 'Service', 'Work Order', 'Employees', and 'Communications'. Below the tabs is a breadcrumb trail: 'Service Requests Home > Service Requests List > Service Requests - HelpDesk'. The main content area displays the request ID 'RFS-1-2634481811'. Below the ID is a navigation bar with buttons: 'Menu', 'New', 'Delete', 'Query', 'Submit', 'Apply Template', and 'Quick Close'. To the right of the ID is a navigation control showing '1 of 10+' with left and right arrows. Below the navigation bar is a form with a 'Title' field containing 'Please remove agent JSMITH1', an 'Area' dropdown menu set to 'iNeed', and a 'Requested Item' field.

## 29. Searching for an employee record

You may wish to see the record of an employee to view details and any SRs associated with them.

- Click the site map icon
- Select and then
- Search for the employee record by clicking the button.
- Select the record by clicking on the last name link for the record.

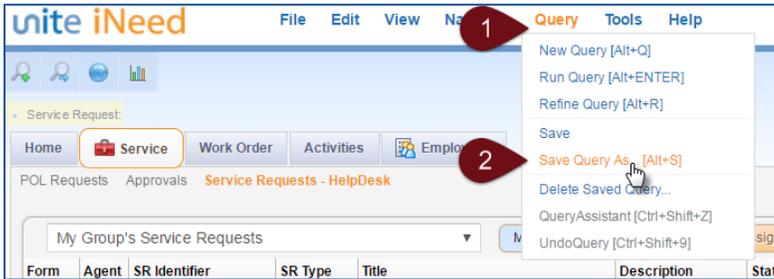
Last Name	First Name	Index
<a href="#">VALDES</a>	Jonathan	17043
<a href="#">VALD</a>	Jonathan Christian	

- The employee record (including subtabs) is displayed.

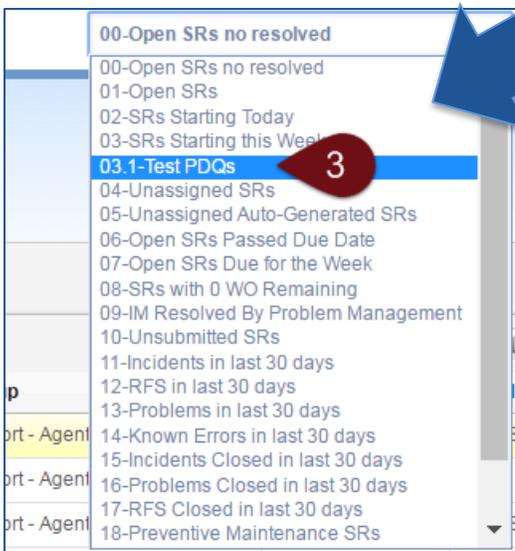
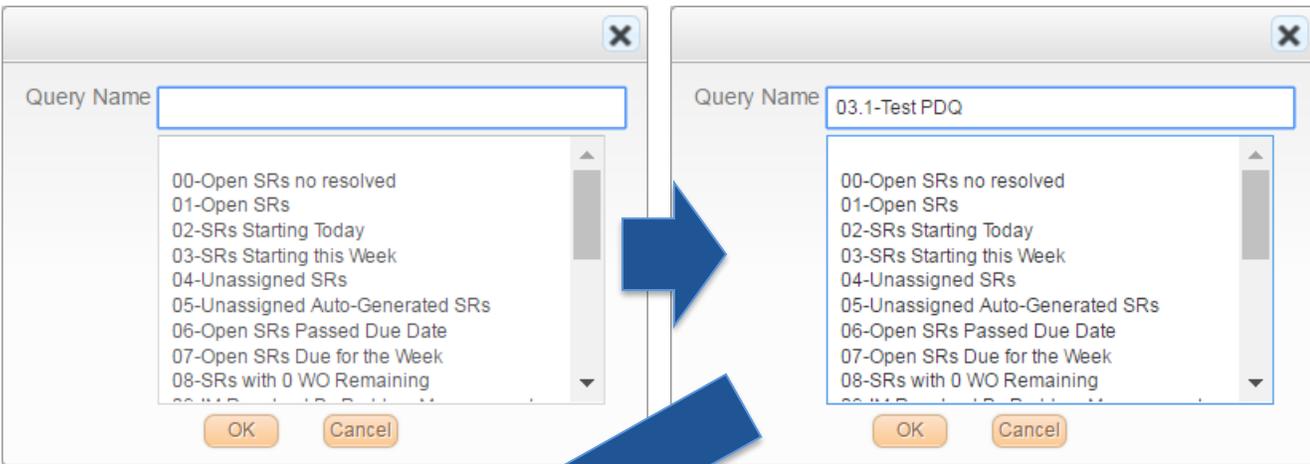
### 30. Saving a custom query to your PDQ list

After running a query (for more information on querying, please see the [Querying Guide here](#)), you can save the query to your PDQ list.

- After performing a custom query and sort, click on **Query** <sup>1</sup> → **Save Query As... [Alt+S]** <sup>2</sup>



- Enter the name of the query in the text field at the top. **Please note that the list will sort itself alphanumerically, meaning that the name *03.1-Test PDQ* will end up between *03-SRs Starting this Week* and *04-Unassigned SRs***



If you give an item a name that places it at the top of the PDQ list, it will be the first query run when coming to the screen.

## 31. Exporting data from iNeed

Most list views allow you to export data to Excel.

- Click on **Menu** → **Export**.

The screenshot shows the 'My Group's Service Requests' table in the iNeed system. A 'Menu' dropdown is open, and the 'Export...' option is highlighted. A red circle with the number '1' points to the 'Menu' button, and another red circle with the number '2' points to the 'Export...' option in the dropdown menu.

Form	Agent	SR Identifier	SR Type	Title	Status
		RFS-1-2654495083		Request for: Vendor	New
		RFS-1-2654642703			Open
Yes		RFS-1-2654495364		Request for: Educati	New
		RFS-1-2661180466		Request for: Assets A	New
		RFS-1-2661180570		Request for: Assets A	New
		IM-1-2648333108		Request for: RFA - C	Open
		IM-1-2648333657		Request for: RFA - V	Open
		IM-1-2650123497		Request for: Correcti	Open
		IM-1-2650123951		Request for: User Ad	Open
		IM-1-2657121661			Open

- In the pop-up, make the appropriate selections for the content and format of the exported file and click **Next**.
- A message will appear once the export has completed successfully. Please wait until your export has completed successfully and the file has finished downloading before clicking **Close**.

The 'Export' dialog box is shown with the following options:

- Rows to Export:  All Rows In Current Query,  Only Current Row
- Columns To Export:  All,  Visible Columns
- Output Format:  Tab Delimited Text File,  Comma Separated Text File,  HTML,  Text File With Delimiter: [text input]

A red circle with the number '3' points to the 'Next' button.



The 'Export' dialog box now shows a success message: "Export completed successfully. 15 rows of records have been exported. Please close the dialog box or proceed with another export operation." A red circle with the number '4' points to the 'Close' button.

## 32. Query operators

When performing manual queries (searches) in iNeed, use the following keywords to construct your search strings:

Operator	Description	Example
*	Wildcard operator. Placed anywhere in a string, returns records containing the string or containing the string plus any additional characters at the position at which the asterisk appears, including a space.	*rang* finds <i>arrange, arranged, orange, orangutan, range, ranges, ranging, rang, strange, stranger, strangest, strangle, wrangle</i> , and so on. You cannot use * to find dates.
?	Wildcard operator. Placed anywhere in a string returns records containing the characters specified in the string plus any one additional character which appears at the location of the question mark.	?rag finds <i>brag, crag, or drag</i> , but not <i>bragging</i> . t?pe finds <i>type</i> and <i>tape</i> , but not <i>tripe</i> .
" "	Surrounds a string that, unless modified by a wildcard (* or ?), must be matched exactly. Quotes let you query for a group of words in its exact order.	"Sun Solaris" finds records that contain <i>Sun Solaris</i> in the query field.
=	Placed before a value, returns records containing a value equal to the query value.	=Smith finds all records for which the value in the query field is <i>Smith</i> . It also turns off wildcards within the query value.
<	Placed before a value, returns records containing a value less than the query value.	<6/20/01 finds all records in which the value of the query field is before 20 June 2001. When entering a date, use the format that is specific to your implementation.
>	Placed before a value, returns records containing a value greater than the query value.	>5/31/01 finds all records in which the date in the query field is later than 31 May 2001. When entering a date, use the format that is specific to your implementation.
<>	Placed before the value, returns records containing a value that is not equal to the query value.	<>6/20/01 finds all records in which the date in the query field is not 20 June 2001. <>Paris finds all the records in which the value in the query field is not <i>Paris</i> .
<=	Placed before a value, returns records containing a value less than or equal to the query value.	<=500 finds all the records in which the value in the query field is less than or equal to 500.
>=	Placed before a value, returns records containing a value greater than or equal to the query value.	>=500 finds all records in which the value in the query field is greater than or equal to 500.
Today()	Placed on Date and Datetime fields. This can be used in conjunction with <, >, =. Used to denote current datetime value.	< Today () – 1 finds all records in which the value in the query field is older than yesterday.
IS NULL	Keywords used to find entries where the field has no value whatsoever.	Closed Date IS NULL finds all rows that have no Closed Date.
IS NOT NULL	Keywords used to find entries where the field has any value.	Closed Date IS NOT NULL finds all rows that have a Closed Date.
~LIKE	Allows you to ignore case sensitivity when querying.	~LIKE "test" will return <b>Test, test</b> and <b>TEST</b> .
AND	Used to combine operations where both have to be true.	> 02/05/2013 <b>AND</b> <= 16/05/2013 returns anything between the 3 <sup>rd</sup> and 16 <sup>th</sup> of May 2013.
OR	Used to combine operations where either or both are true.	Open <b>OR</b> Closed will return both open and closed results.

### 33. Useful keyboard shortcuts

Below is a list of common keyboard shortcuts to make navigation in the system easier for iNeed users:

- Record Navigation:
  - Next field = **Tab**
  - Previous field = **Shift + Tab**
  - Save record = **Ctrl + S**
  - New record = **Ctrl + Alt + N**
  - Copy record = **Ctrl + B**
  - Delete record (where applicable) = **Ctrl + D**
  - Refresh view = **Alt + Enter**
  - Next/Previous record in a list = **Ctrl + Shift + < / >**
  - Next/Previous Page on a list = **Ctrl + Alt + < / >**
  - Select all records = **Ctrl + A**
  - Record count: **Ctrl + Shift + 3**
- Query Management:
  - New query = **Alt + Q**
  - Run query = **Alt + Enter**
  - Refine query = **Alt + R**
  - Save query as = **Alt + S**
- Menu Options:
  - Define columns displayed = **Ctrl + Shift + K**
  - Define sort order = **Ctrl + Shift + O**
  - Site map = **Ctrl + Shift + A**
  - Log out of iNeed = **Ctrl + Shift + X**