Service Desk

Planon Software Suite

Version: L105

Planon

Building Connections

About this Document

Intended Audience

This document is intended for *Planon Software Suite* users.

Contacting us

If you have any comments or questions regarding this document, please send them to: support@planonsoftware.com.

Document Conventions

Bold
Names of menus, options, tabs, fields and buttons are displayed in bold type.

Italic text
Application names are displayed in italics.

CAPITALS
Names of keys are displayed in upper case.

Special symbols

	Text preceded by this symbol references additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

Table of Contents

About Service Desk - Web Client

Service Desk in Planon ProCenter Web Client is a front-office application that is used to register or find service requests and reservations on behalf of requestors.

Screen layout

As a front-office application, **Service Desk** has a different layout from most Planon ProCenter TSIs.

The following image displays the screen layout consisting of various sections in Service Desk.

1	Search panel - Displays the filters that you can use to find relevant service requests and reservations, both new and existing ones.
2	Add panel - Here you can start adding new service requests and reservations. The list shows standard orders and can be filtered by entering search criteria on the **Search panel**.
3	View panel - Here you can look for existing orders. The list can be filtered by entering search criteria on the **Search panel**.
4	Draft panel - Displays the drafts saved by the current user while trying to add a new service request. If there are no drafts, this panel is not visible.

Service Desk - Concepts

This section explains concepts available in the **Service Desk** TSI and the way they are related to each other.

See the links below for more information:

- Search panel
- Add panel
- View panel
- Draft panel

Search panel

The section in **Service Desk** (Web Client) where filter criteria can be entered in order to find relevant existing service requests and reservations or to find relevant standard orders on which new requests and reservations can be based.

The Service Desk **Search panel** is based on the Who, Where, What concept, which means that you can narrow down your query by filtering on requestor (who), on property, on space (where), on asset ID and/or on SLA service (what). You can apply these search criteria separately, but you can also combine them.

> The **Search panel** is customizable. Filter criteria and filter sections can be added or removed as required by a functional application manager. When a (new) order is created via the **Add panel**, fields that were entered on the **Search panel** are automatically taken over.

Filtering in the search panel

Filtering enables you to quickly find the relevant data when adding new requests/reservations or when searching for existing ones.

The filtering will impact the results in **Add panel** and **View panel**.

For more information on filtering, see Add panel and View panel.

Add panel

The Add panel is a section in **Service Desk** (Web Client) where standard orders are listed, upon which new service requests and reservations can be based.

> **ℹ** The standard order must be linked to a web definition (PSS2 case part) so that they can be displayed in the **Add panel**.

The **Add panel** in Service Desk initially lists all standard service requests and standard reservations available. You can filter the list by entering the specific requestor, space, asset or building in the **Search panel**.

The standard orders are filtered based on their applicability for the entered Property, Asset, Space or Requestor. For example, if a space is entered in the **Search panel**, the applicability of the standard order is determined as follows:

- If the standard order's applicability = All

    The standard order is shown, regardless which value is entered for the space in the search panel.

- If the standard order's applicability = None

    The standard order is not shown, regardless which value is entered for the space in the search panel.

- If the standard order's applicability = Specific

    The standard order is only shown if it is linked to the space category of the space that is selected in the search panel.

The same is true for property, asset and requestor, with the following additions:

- If a property is entered, the selected property or any of its parent properties is considered.

- If an asset is entered, the asset group of the selected asset is considered.

- If a requestor is entered, the requestor's user group is considered.

So the 'Who' filter helps you find the types of service requests and reservations a requestor is allowed to submit. The 'Where' filter helps you pinpoint what types of requests and reservations apply to a specific property or space.
Similarly, the 'What' filter helps you pinpoint what types of requests and reservations apply to a specific asset or SLA service. You can use these filters separately, but you can also combine them. Evidently, the more filters you use simultaneously, the less results your search will produce.

> **ℹ** For more information on standard order applicability, refer to *Basic Data*.

View panel

Section in **Service Desk** (Web Client) where all existing orders are listed.

The **View panel** in Service Desk initially lists all existing service requests and reservations. If you want to see the service requests and reservations that were added for a specific requestor or for a specific building, you can filter the list by adding the field of the **Search panel** as (invisible) field to the Search block of the **View panel**. The view panel is filtered on the matching fields of the order. Filtering on fields that are not present

on the **View panel** (e.g. Description) can be done by adding these fields as (visible) fields to the Search block. In the **View panel** you can also select the existing orders and view the details.

> ℹ️ For more information on configuring the View panel, refer to the *Self Service Configuration Guide*.

Draft panel

The **Draft panel** in Service Desk lists all the service requests that are created, but not submitted yet by the current user. The panel displays a maximum of five drafts. The drafts are displayed from left to right, with the latest draft on the left. The details displayed on the draft are: description of the request type, name of the requestor and reported date and time.

Service Desk – Features

The following sections describe the order of the processes in Service Desk. Configuring Service Desk involves the following steps:

- Go to Working with the Search panel in order to learn how to filter out the right service requests and reservations for display on the **Add panel** and the **View panel**.

- Go to Adding a service request or reservation in order to learn how to enter a new service request or reservation.

- Go to Viewing existing service requests or reservations in order to learn how to retrieve details on existing service requests or reservations.

Working with the Search panel

The **Search panel** is used to find relevant service requests and reservations according to the Who, Where, What principle. The search results can be used to add new requests and reservations (**Add panel**) or to search existing orders (any type) (**View panel**).

Procedure

1. If you want to search by Requestor, enter the requestor's name in the WHO section.

   To select a requestor's name, click the **Select a value** button and type the requestor's Surname / First name / Initials and select from the suggested names. Alternatively, you can directly type the name or code in the **Requestor** field and select from the auto-suggested name. The **Requestor** filter is highlighted to indicate that the filter is active. The results on the **Add panel** are immediately filtered to display the types of service requests and reservations this requestor is allowed to submit. The **View panel** is filtered to display the orders (any type) this requestor has already submitted.

2. If you want to search by location, enter filter criteria in the WHERE section to search on Property and/or Space.

3. Similarly, you can enter filter criteria in the WHAT section to search on Asset ID and/or SLA service.

   With each additional filter criteria, already selected filter criteria will be deactivated. However, the deactivated filter criteria remains visible on the filters.

4. To activate or deactivate multiple filter criteria simultaneously, click their filter icons. If the filter icons are highlighted, the filters are activated.
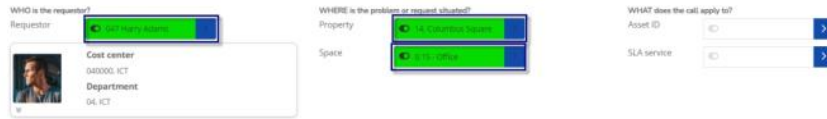
ℹ️ The more filter criteria you activate simultaneously, the less results will be displayed on the **Add panel** and **View panel**.

You can now continue to add a new service request or reservation or to view existing ones.

ℹ️ Use the **Clear** button on the top right corner of the screen to remove the search criteria of all the filters in one go.

Adding a service request or reservation

Use this procedure to add a service request or reservation in **Service Desk.** The **Search panel** filters can help you to display a list of relevant service requests / reservations to choose from on the **Add panel**.

P r o c e d u r e

1. You have applied relevant filters on the Search panel.
2. On the Add panel, look for the required standard service request or reservation.

   The new service request / reservation will be based on this standard.

3. Click the service request or reservation to open an Add form.
4. Check the auto-completed data on the form.
5. Change existing data or add additional data as required.
6. Click Submit.

   A **Confirmation** window is displayed with details of the request and a confirmation message that the action was successful.

7. Click Close.

The service request or reservation is now submitted and displayed in the **View panel**. Any sub-orders and sub-reservations are not visible in **Service Desk**. They are routed to back office TSIs such as **Service Manager** or **Reservations**, where they are assessed, assigned and monitored.

Saving a service request as draft

If you are interrupted while entering a service request, you can save it as a draft and continue your data entry later.

Procedure

1. Select the relevant service request on the Add panel.

An Add form is displayed.

2. Click on the Save as draft button to save the form as a draft.

The draft is saved with all the fields that were filled in automatically or filled in by you. The saved drafts are displayed on the Drafts panel below the View panel.

> **i** Any files or images added to the call are not saved in the draft. They will be removed.

3. Click on the saved draft to retrieve it. The Add form is displayed.
4. Click on the Submit button when you have finished with the draft, to add the service request.

    or

    Click on the **Update draft** button to save it again as draft, but with additional data.

    or

    Click on the **Delete draft** button to entirely remove the draft.

Viewing existing service requests or reservations

Use this procedure to view an existing order (any type) in **Service Desk**. The **Search panel** filters will help you to display a list of relevant orders on the **View panel.**

Procedure

1. You have applied the relevant filters on the Search panel.
2. On the View panel, select the Service requests tab to find a relevant order.

or

Select the Reservations tab to find a relevant reservation.

3. If required, enter more specific search criteria in the search section of the View panel. For service requests, you can for instance search by Number, Description and Reported on period. For reservations, you can search by Number, Description, Start date & time and Reservation unit.
4. To view the details, click the relevant service request or reservation.

    A **Details** window is opened, displaying background information on either the service request or the reservation.

5. To return to Service Desk, click the Back button.

The **Details** windows in **Service Desk** can be configured to include navigation buttons to the back office. If these buttons are available and you have the appropriate authorization, you can:
Navigate to **Service Manager**, starting from a service request's **Details** page.
Navigate to **Reservations**, starting from a reservation's **Details** page.

For more information on working with Service Manager or Reservations, see *Service Manager* and *Reservations*.

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