Request Management

User Guide

Changepoint PSA 2017

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1. Request Management Introduction

Request management process overview

You can create, process and monitor requests related to the products and services that your organization provides to its customers. The kinds of requests that can be logged include: bug fixes, requests for changes, new features or for support.

Approvals

A new request may require approval before it is assigned for resolution. Approvals can also be required at different stages in the resolution process. A request workflow defines the approval process and ensures that the appropriate people within your organization are assigned to the request. The workflow can also include escalation procedures to ensure requests are responded to, and resolved, in a timely manner.

Assignment

Requests are assigned to resources or to request queues for resolution. Request queues are used to assign approved requests to teams for action.

Service level agreements (SLAs)

SLAs define the terms of support and service provided for products by your organization to customers. If your organization has an SLA with the customer who initiated the request, the system checks the details of the agreement to ensure you are creating the request within the parameters of the SLA.

Tracking time worked on requests

Resources enter the time they worked on the request in their time sheets. If the request is billable, customers are invoiced according to the rates established for their engagement.

About processing requests

Requests are routed through the approval process and sent to request queues for response. Incoming requests are verified by the service level agreement (SLA) entered in the engagement.

The escalation and routing process for each request is controlled by a workflow, which ensures that the appropriate support team member addresses the request. Support team members may need to log time against requests for invoicing purposes.

A reminder displays in the **My Reminders** portlet on resources' home page to inform them that a request has been assigned to them.

Resources process a request by opening the request, dealing with or resolving the issue, editing the **Edit Request** dialog box accordingly, and saving the request.

As the request moves through the workflow, the **Status** field updates according to the current workflow state/process. For more information, see "About request statuses" on page 25.

If there has been no response or resolution to a request within the escalation time defined on the SLA, the request is escalated. For more information, see "About request escalation" on page 27.

2. Request Basics

About requests

You can effectively and consistently track, manage and resolve requests (for example, defects, service requests, etc.) that are logged by your customers.

Requests logged by end-users are validated and, if approved, assigned to a resource. Depending on the request type and the categories and subcategories configured for your organization, approved requests are automatically assigned to a specific queue or resource for action or resolution.

Request icons

Icon	Description
	Open requests that are currently awaiting resolution. All requests that have not been rejected or closed are considered open requests.
	Closed requests for which work has been completed.
	Requests that have been rejected by the designated request approver.

Standard request types

This topic describes the standard requests type in Changepoint. Your organization may have additional request types.

Request Type	Description
Bug report	Problems or bugs found in products.
Change request	Requests for change related to the organization's business. The change can refer to a product, a project, a process, a resource assignment, and so on.
Feature request	New features for existing products.

Request Type	Description
Support request	Support related to resource's business.
Work request	Requests to initiate new work. The request may have a quick resolution or it may lead to a project involving a team of resources.

About accessing requests

You can access a request from the following locations:

- From the portlets on the home page. For more information, see "Request management portlets" in the *User Basics User Guide*.
- From a contact profile. For more information, see "Accessing a request initiated by a contact" on page 11.
- From the **Support Customers** tree view. For more information, see "Accessing a request under a service level agreement (SLA)" on page 10.
- From the **Open Requests** tree view. For more information, see "Accessing a request from the Open Requests tree view" on page 11.

Accessing a request under a service level agreement (SLA)

From the **Support Customers** tree view, you can access requests for the customers that have a service level agreement (SLA) with your organization.

Customers are sorted by account type. Listed under each customer in the tree view are the engagements that have a defined SLA. Contacts, products, and requests are included under each engagement in the tree view.

1. Click **Requests** > **Support Customers**.

   The **Support Customers** tree view appears.

2. Do one of the following:

   - Expand the tree view to locate the request.
   - To search for a company, contact, engagement, product, or request in the tree view, enter search criteria in the **Filter** field and click **Filter**.

     All search matches appear in the tree view.

3. Click the request number.

   The request profile appears.

Accessing a request initiated by a contact

The **Related requests** section of a contact profile displays summary information of all open and closed requests, sorted by request type, that have been initiated by the contact.

1. Access the contact profile.
2. Expand the **Related requests** section.
3. Do one of the following:
   - To view open requests, expand the **Open requests** tree view.
   - To view closed requests, expand the **Closed requests** tree view.
4. Expand the request type of the request that you want to view.

Accessing a request from the Open Requests tree view

Open requests are requests that do not have a request status of **Canceled**, **Rejected** or **Closed**. Open requests are listed under the resource or request queue to which they are assigned.

1. Click **Requests** > **Open Requests**.
2. Do one of the following:
   - Click the name of the responsible resource or request queue to locate the request.
   - To search for the request by number, use the **Search** option. For more information, see "Searching for a request in the Open Requests tree view" on page 11.
3. Click the request number.

   The request profile appears.

Searching for a request in the Open Requests tree view

1. Click **Requests** > **Open Requests**.
2. In the tree view, click **Options** > **View** > **Search**.
3. In the search field, enter the full or partial number of the request and click **Search**.
4. Click the request number.

The request profile appears.

Creating a request

You can create a request on its own or from the company, contact or project entity profiles. When you create a request from an entity profile, the entity-related information is automatically added to the request.

1. Click **New > Request**.
2. If the **Select Request Template** dialog box appears, do one of the following:
   - To use a request template, select the template and then click **OK**.
   - To create the request without a template, select **No template** and then click **OK**.

   The **Create Request** dialog box appears.
3. Complete the fields as required. For more information, see "Create/Edit Request dialog, General tab options" on page 13.
4. In the **Details** tab, enter detailed information about the request.
5. In the **History** tab, do the following:
   a. In the **Comments** field, enter your comments.
   b. To allow Client Portal users to view the request details in the request history, select the **Can be viewed by Client Portal users** check box.
6. In the **Reason** tab, enter the reason the problem occurred or the work is required.
7. In the **Resolution** tab, enter the details regarding the resolution of the request.
8. In the **Estimates** tab, enter estimates and reference information for the request. For more information, see "Create/Edit request dialog, Estimates tab" on page 15.
9. If the **Resource demand information** tab appears, enter resource demand requirements. For more information, see "Entering resource demand information for a request" on page 16.
10. Click **Save**.

Create/Edit Request dialog, General tab options

Option	Description
icon	Displays additional information about specific fields. For more information, see "About additional field values on a request" on page 16.
Request number field	Number assigned to the request. The request number is assigned after you save the request or after you apply the changes.
Reported on field	Time and date on which the request was saved. The time stamp is displayed after you save the request or after you apply the changes.
Originating request type-ahead field	If the current request is created from an existing request, number of the originating request.
Short description field	Description of the request.
Initiator type-ahead field	Resource or contact who initiated the request.
Company type-ahead field	Organization for whom the request is created.
Engagement list	Engagement associated with the request.
Project type-ahead field	Project associated with the request.
Type list	Type of the request. For more information, see "Standard request types" on page 9.
Product list	Product associated with the request. The list displays products without an SLA and products with an SLA.
Quantity field	Quantity of products that will be billed to the customer. This field only displays for work requests related to engagements with the billing type **Effort and product**.
Request priority list	Priority of the request.

Option	Description
Date required field	Date by which the request must have been completed.
Status list	Status of the request. The status options depend on the request workflow.
Assignment type-ahead field	Queue or resource to whom the request is assigned. If you leave this field blank, and request queues have been configured, then the request is assigned automatically to a request queue.
Category list	Problem area associated with this request.
Subcategory list	Subcategory of the request.
Support desk list	Support desk that services the request.
Responsible type-ahead field	Internal resource who is responsible for resolving or following up on the request.
Attachment button	Opens the **Upload Attachment** dialog box for attaching a file to the request. **Note:** Add the attachment last, because the request is submitted when you add an attachment.
Billing Type field	Indicates if the request is billable or not, depending on the selected request type.
Asset list	Asset associated with the request.
Suspended check box	When selected, indicates that the request is suspended. For more information, see "About suspending requests" on page 28.

Create/Edit request dialog, Estimates tab

Field, list or check box	Description
Reference number field	Customer's reference number for the request.
Estimated hours field	Estimate of the hours needed to complete the request.
Estimated service cost field	Estimate of the service costs that will incur to complete the request.
Estimated expenses field	Estimate of the expenses that will incur to complete the request.
Estimated product costs field	Estimate of the product costs that will incur to complete the request.

Changing a request template

You can change the template used for a request anytime.

1. Access the request.
2. Click **Actions** > **Edit**.

   The **Edit Request** dialog box appears.
3. Click **Change template**.

   The **Select Request Template** dialog box appears.
4. Do one of the following:
   - Select the requested template.
   - To work without a template, select **No template**.
5. Click **OK**.

   The **Edit Request** dialog box refreshes according to the selected template.
6. Complete the remaining fields as required. For more information, see "Creating a request" on page 12.
7. Click **Save**.

About additional field values on a request

Your organization can set up additional field values that are provided for informational purposes only. This additional information pertains to entities specified on the request, for example, the address of the company associated with the request.

Additional field values are identified by the icon in the top right corner of the **Request** dialog box. Fields with single values are displayed directly in the **Additional field values** section of the dialog box. Fields with multiple values display in a separate dialog box, which you can access through links provided in the section. The information is grouped by entity.

Additional field values are not visible in the Client Portal.

Entering resource demand information for a request

If resource demand information is enabled for the request type, you can enter information about the estimated work effort required to complete this request. This information is used by resource managers to analyze resource demand and capacity within your organization.

1. Access the request.
2. Click **Actions** > **Edit**.

   The **Edit Request** dialog box appears.
3. Click the **Resource demand information** tab.
4. Right-click the table and select **Insert**.

   A new row is added to the table.
5. Complete the fields as required. For more information, see "Create/Edit request dialog, Resource Demand Information tab" on page 17.
6. Click **Save**.

Create/Edit request dialog, Resource Demand Information tab

Field	Description
Soft-book all check box	When selected, all resources listed in the table are tentatively booked.
Show all bookings on time sheet check box	When selected, the booked time displays in the time sheets of all resources listed in the table.
Add all to calendar check box	When selected, the booked time displays in the personal calendar and in the resource scheduling calendar of all resources listed in the table.
Resource type-ahead field	Resource scheduled to work on the request. Resources in the list are Changepoint resources or generic resources who are active and have been assigned the **Planned Resources** feature.
Workgroup type-ahead field	Workgroup of the requested a resource.
Function list	Function of the resource scheduled to work on the request.
Estimated hours field	Number of hours estimated to complete the request.
Start date field	Date that the resource will start working on the request.
End date field	Date by which the resource must complete the work for the request.

Deleting a resource from the resource demand information of a request

1. Access the request.
2. Click **Actions** > **Edit**.

   The **Edit Request** dialog box appears.
3. Click the **Resource demand information** tab.
4. Right-click a row in the table and select **Delete**.
5. Click **OK** to confirm.

6. Click **Save**.

Editing a request

1. Access the request.
2. Click **Actions** > **Edit**.

   The **Edit Request** dialog box appears.
3. Make the necessary changes.
4. To change the request template, click **Change template**. For more information, see "Changing a request template" on page 15.
5. Click **Save**.

Deleting a request

You cannot delete a request if time has been entered for it, or if it is included in a non-frozen budget revision for contingency cost purposes.

1. Access the request.
2. Click **Actions** > **Edit**.

   The **Edit Request** dialog box appears.
3. Click **Delete**.
4. Click **OK** to confirm.

About requests under company SLAs

When you create a request for a customer with a valid SLA (service level agreement), the terms of the SLA are automatically enforced.

If you open the request at a time that is outside of the SLA time, a warning message appears. If you open a request within the final 90 minutes of an SLA period, a warning message displays the number of minutes left before the support request will be outside of the SLA terms.

The SLA time is based on the time zone of the company and not the time zone of the internal resource who creates or resolves the request.

Attaching a file to a request

After a file is attached to a request, you can access it from the **Attachments** section on the request profile, or from the attachment link on the **Estimates** tab of the **Request** dialog box.

1. Access the request.
2. Click **Actions** > **Edit**.

   The **Edit Request** dialog box appears.
3. On the **General** tab, click **Attachment**.

   The **Upload Attachment** dialog box appears.
4. Click **Browse** to locate and attach the file.
5. In the **File name** field, enter a name for the file.
6. In the **Description** field, enter a description.
7. To restrict access to the attachment to yourself, select the **Private** check box.
8. Click **Upload**.

Copying a request

You can create a new request by copying the information from an existing request. The field values from the original request are copied to the new request and the original request number displays in the **Originating request** field. When you save the new request, a new request number is applied and the new request number is linked to the original request. If the original request was created using a request template, then the copied request uses the same template.

1. Access the request.
2. Click **Actions** > **Create** > **Copy**.

   The **Create Request** dialog box appears.
3. Complete the fields as required.
4. Click **Save**.

Sending an email from a request

You can send an email in plain text format from a request profile or request history view. Some of the request information is automatically added to the email. You can also add the

request attachments. You can enter email addresses manually or search for the email addresses of resources and contact entity-based configurable fields.

After the email is sent, the request history is updated with the following details about the email: sender, recipients, subject, attachment file names, and date and time that the message was sent to the email queue.

1. Access the request.
2. Do one of the following:
   - On the request profile, click **Actions > Update > Send email**.
   - From the history view of the request, click **Actions > Send email**.

   The **Email Notification** dialog box displays the **General** tab.
3. To search for recipients:
   a. In the **Recipients** section, do one of the following:
      - To search for contact entity-based configurable fields, select **<Company> or request contacts**.
      - To search for company contacts, select **All contacts**.
      - To search for resources in your organization, select **Resources**.

   b. Do one of the following:
      - To view the entire list, click in the type-ahead field and then press **Enter**.
      - To filter the list, enter a few characters of the recipient's name in the type-ahead field and then press **Enter**.

   c. In the list, select one or more recipients and then press **Enter**.

      The **To** field displays by default the email address of the request initiator.

   d. To add the recipients to the email, click the **To**, **Cc**, or **Bcc** fields.
4. To enter recipients manually, enter the email addresses separated by semicolons in the **To**, **Cc**, or **Bcc** fields.
5. In the **From** field, change the email address, if required. If you leave the field blank, the default **From** address that was set up for Changepoint is used.
6. In the **Subject** field, make the necessary changes.
7. In the **Comments** field, enter your comments.

8. To allow Client Portal users to view the email details in the request history, select the **Can be viewed by Client Portal users** check box.
9. You can attach a file. For more information, see "Attaching a file to an email from a request" on page 21.
10. Click **Send email**.

Attaching a file to an email from a request

When you create an email from a request, the attachments on the request are automatically listed on the **Attachment** tab of the **Email Notification** dialog box. In the **Attachment** tab, you can attach additional files to the request and delete files (that you attached to the request) from the request. You must then select the files that you want to attach to the email.

1. Create the email from the request. For more information, see "Sending an email from a request" on page 19.
2. Click the **Attachment** tab.

   The attachments from the request are listed.
3. To attach a file to the **Attachment** tab and the request:
   a. Click **Attach file**. The **Upload Attachment** dialog appears.
   b. Complete the fields as required. The file is added to the list on the **Attachment** tab and to the request.
4. To delete a file from the **Attachment** tab and the request:
   c. Select the check box beside the file name.
   d. Click .
   e. Click **OK** to confirm.
5. To attach a file to the email:
   a. Click the **Attachment** tab.
   b. Select the check box beside the file name.
6. Click **Send email**.

About creating entities from requests

From a request, you can create opportunities, engagements, projects, and tasks provided that the request status is not **New**, **Canceled**, **Pending Approval**, or **Rejected**.

When an entity is created from a request, an **Originating request** section is added to the entity profile with a link to the request. Similarly, a section is added to the request profile with a link to the entity. For example, if you create a project from a request:

- a **Related projects** section that contains a link to the project is added to the request profile
- an **Originating request** section that contains a link to the request is added to project profile.

Associating a request with a funding source

1. Access the request.
2. Click **Actions** > **Associate Funding Source**.

   The **Associate Funding Source** dialog box appears.
3. Complete the fields as required. For more information, see "Associating an entity to a funding source" in the *Financial Management User Guide*.
4. Click **Save**.

Associating resource demand for a request with a funding source

A funding source icon appears beside the table entries that are associated with funding sources. This icon applies to the table entries, but not to the request itself.

1. Access the request.
2. Click **Actions** > **Edit**.

   The **Edit Request** dialog box appears.
3. Click the **Resource demand information** tab.
4. Do one of the following:
   - To associate the request with a funding source, click **Associate funding source**.
   - To associate a demand item in the table with a funding source, right-click the record and select **Associate funding source**.

The **Associate Funding Source** dialog box appears.

5. Complete the fields as required. For more information, see "Associating an entity to a funding source" in the *Financial Management User Guide*.

6. Click **Save**.

3. Request Processing

About request queues

Request queues are holding areas for requests that are not assigned to a specific resource. Queues can be created for a specific team depending on product, product category, priority or other criteria. Resources that have access to the queue can assign the requests to the appropriate resource or they can work on requests themselves.

Request queues are accessed from the **Open Requests** tree view.

About request statuses

When a new request is saved, it is assigned a status. The request status is determined by the request workflow definition. If the request workflow does not have an initial state transition, the request status is set to the initial state of the workflow (for example, **New**). If the workflow has an initial state transition, the **Status** field on the request profile displays the process name (for example, **New** to **Approved**). As the request is routed through the workflow, the **Status** field is updated according to the current workflow state/process.

The following table lists the standard request statuses and descriptions of how the statuses can be used within the request workflow.

Status	Description
Pending approval	The request is waiting to be either approved or rejected.
Approved	The request has been reviewed by the approver and accepted as a request to be worked on.
Rejected	The request has been reviewed by the approver and not accepted as a request to be worked on.
New	The request is newly created.
Queued	The request has been placed in a queue, which determines where the request moves in the workflow. Queues are optional. Requests can be distributed either through queues or by direct assignment.

Status	Description
Assigned	The request has been approved (if approval is required) and has been assigned to an individual for action. The resource assigned to the request receives a notification in the **My Reminders** portlet on their home page.
Reassigned	After the request was assigned, it was reassigned to a different resource.
In Service	The request is in the process of being resolved or worked on after it has been assigned to a resource (either directly or through a queue).
Clarification required	Additional information is required as part of the resolution process.
Clarified	Additional information was provided as part of the resolution process.
Pending verification	The request is resolved; however, more information must be provided before it is closed.
Closed-Pending verification	The request is resolved and will be closed after more information is provided, usually by the initiator, who verifies that the resolution is acceptable.
Opportunity created	The request has been accepted or selected for further consideration.
Project created	A new project has been created from the request information.
Canceled	The request has been canceled.
Closed	The request has been resolved.
Reopened	The request has been closed, but was reopened. A request can be reopened as long as it has not been canceled. That is, it can be reopened from **Rejected**, **Closed**, or **Closed-Pending Verification**.

About request escalation

Request escalation occurs if there has been no response or resolution within the escalation time interval set in the service level agreement (SLA).

When a request is escalated, it is automatically assigned to the support desk manager. The request status does not change, but an entry is recorded in the request history. The escalation history can be viewed in the request history, along with all other changes that are made to the request throughout the request life cycle.

Eligibility for response escalation

A response is considered to occur the first time a resource edits the request and the status is **In Service**. To be eligible for response escalation, the request status must be **New**, **Queued**, **Assigned** or **Clarification Required**.

Eligibility for resolution escalation

A request is considered to be resolved when its status is set to **Closed**, **Closed Pending Verification**, **Rejected** or **Canceled**. To be eligible for resolution escalation, the request status must not be **Closed**, **Closed Pending Verification**, **Rejected**, or **Canceled**.

A request cannot be escalated while its status is **Suspended**. For more information, see "About suspending requests" on page 28.

Processing a request assigned to a queue

Requests assigned to queues can only be accessed through the **Open Requests** tree view. If a request is in a queue, there can be a specified team of people allowed to edit the request. Resources who edit the request from the queue can assign the request to other resources, or they can resolve the issue themselves and then change the request status accordingly.

1. Access the request.
2. Click **Actions** > **Edit**.

   The **Edit Request** dialog box appears.
3. Resolve the issue or make the necessary changes to the request, and then update the request information accordingly.
4. Click **Save**.

Processing a request assigned to you

When a request has been assigned to you, you receive a reminder in the **My Reminders** portlet on your home page.

1. Access your **My Reminders** portlet.
2. Click the **You have <n> open requests assigned to you** link.

   The **Requests Queue** view appears. The **Requests Assigned to Me** section shows which requests are assigned to you.
3. Click the request number to open the request profile.
4. Resolve the issue or make the necessary changes to the request, and then update the request information accordingly.
5. Click **Save**.

About suspending requests

Requests can be suspended when work should not be performed on them, and reactivated when work can be continued.

When you suspend a request, it is removed from the **Open Requests** tree view. The request is not included in the open requests report or in the number of open requests. You can still access the suspended request from your **Requests Initiated by Me** portlet on your home page.or from the the **Suspended Requests** report.

A request cannot be escalated while its status is **Suspended**. Once the request is reactivated, it is escalated when the remainder of its escalation interval expires. The elapsed time during which the request is suspended is not counted.

For example: The response escalation time for a request is 2 hours. After 1 hour the request is suspended for 1.5 hours. The request is escalated 1 hour after reactivation, when the original 2 hour interval, ignoring the suspension time, expires.

Suspending a request

1. Access the request.
2. Click **Actions > Edit**.

   The **Edit Request** dialog box appears.
3. In the **General** tab, select the **Suspended** check box.

4. Click **Save**.

   On the request profile, **Suspended** displays in red.

Reactivating a suspended request

1. Access the request.
2. Click **Actions** > **Edit**.

   The **Edit Request** dialog box appears.
3. In the **General** tab, clear the **Suspended** check box.
4. Click **Save**.

Entering time that you worked on a request

You can enter time for a request after you edit the request or from the request profile. If you are assigned to the request, you can also enter time for it in your time sheet. The time that you enter appears in your time sheet regardless of where you entered it.

To enter time after editing a request

1. After you edit the request, click **Save**.
2. Click **OK** to enter time for the request.

   The **Enter Request Time** dialog box appears.
3. Complete the fields as required. For more information, see "Edit Request Time dialog box options" on page 30.
4. Click **Save**.

To enter time from the request profile

1. Access the request.
2. Click **Actions** > **Create** > **Request Time**.

   The **Enter Request Time** dialog box appears.
3. Complete the fields as required. For more information, see "Edit Request Time dialog box options" on page 30.
4. Click **Save**.

Edit Request Time dialog box options

Option	Description
Start date field	Date that you worked on the request.
Start time field	Time that you started working on the request.
Time zone field	Time zone of the location where you worked on the request.
Regular hours field	Number of hours that you worked on the request.
OT hours field	Number of overtime hours that you worked on the request.
Description field	Information about the work that was performed.
Work location group field	Work location group where you worked on the request.
Work location field	Location where you worked on the request.
Work code category field	Work code category for the request.
Work code field	Work code that describes the type of work.

Troubleshooting requests

This topic provides information for troubleshooting requests.

Cannot view a request

You may not be able to view a request for the following reasons:

- Access to the request may be restricted to specific resources, either for the support desk or the request queue.
- Request workflow is enabled, in which case requests are queued only when the workflow is complete.
- If you just created the request, it may not have been moved to the request queue yet. Try again in a few minutes.

4. Request Template Management

About request templates

You can create request templates that simplify and streamline the creation of requests by doing one or more of the following:

- preset values for fields
- hide sections or tabs on the request dialog box that are not required
- hide request configurable field groups on the request dialog box that are not required

You can create personal request templates for your own use. If you have additional access rights, you can create shared request templates that can be used by other resources.

Request templates do not control the following:

- Preset values for fields on a request template cannot override your access to data in the request. For example, if the preset value for the **Project** field is a project that you do not have access to, the preset value cannot be set on the request.
- Preset values for fields cannot override standard Changepoint behavior. For example, if the request is created from an entity (project, company, or contact), then the entity values are set on the request, regardless of the preset values on the request template.
- Calculated fields are calculated only on the request and not on the request template.
- Expanded or collapsed state of sections or groups on the request dialog box.
- Tabbed or inline display format of the request dialog box, which is determined by your preference settings.

Accessing the request templates

1. Click **Preferences**.
2. Expand the **Request templates** section.

   Your personal request templates and shared request templates are displayed in a table.

About creating request templates

Creating a request template consists of the following steps:

- Creating the request template and specifying the preset field values

- Specifying the general settings – includes specifying if the request template is shared
- If the template is a shared request template, then you must also specify access settings

Creating a request template and presetting field values

The fields that are marked as mandatory are not mandatory for creating the request template.

1. Click **Preferences**.
2. Expand the **Request templates** section.
3. Right-click in the request template table and select **Create request template**.

   The **Create Request Template** dialog box appears.
4. In the **General** tab, enter a name for the request template in the **Template name** field.
5. To preset field values, select the values for the fields.
6. To preset values for configurable fields, you must select values for the following fields to make the configurable fields display:
   - **Company**
   - **Engagement**
   - **Type**
7. Click **Save**.

   The **Edit Request Template Settings** dialog box appears.
8. Define the general settings. For more information, see "Defining general settings for a request template" on page 32.

Defining general settings for a request template

You can set options to make the request template your default template, or to be prompted to select a template when you create requests. You can also hide tabs or sections or configurable field groups.

Warning: If you hide a tab or section, or configurable field group, you must provide values for all of the mandatory fields in the tab or section, or group. Do not hide a tab or section or group that contains configurable fields that may become mandatory through conditional properties.

1. To share the request template, select the **Shared request template** check box.
2. Do one of the following:
   - To use the template every time that you create a request, select the **Default request template** check box.
   - To be prompted to select a template when you create a request, select the **Prompt for request template** check box.
3. To hide a tab or section, select the corresponding check box in the **Hide tab or section** section.
4. If you are hiding the **General** tab or section, in the **Short description maps to** list, select the configurable text field that will be used in place of the **Short description** field.
5. To hide a configurable field group, select the group in the **Hide group** column of the configurable field groups table.
6. If the template is a shared request template, define the access settings. For more information, see "Specifying access settings for a shared request template" on page 34.
7. Click **Save**.

About hiding the General tab on a request template

The **General** tab contains the **Short description** field, which typically contains information that is unique to each request. If you want to hide the **General** tab on a request template, then you must do the following:

- Create a configurable text field to be used in place of the **Short description** field.
- Add the configurable text field to one of the other tabs on the request dialog.
- Map the configurable text field to the **Short description** field when you define the general settings for the request template.

About specifying access settings for shared request templates

You must make the shared request template available for other resources and Client Portal users to use the template to create and edit requests.

About making shared request templates mandatory

You can make the use of a shared request template mandatory for all resources. Mandatory shared request templates are automatically assigned a priority in the order that they are created. However, the priority can be edited.

About restricting access to shared request templates

Once you make a request template available, it is available to all resources by default. However, you can restrict access to the request template to one or more of the following:

- individual resources
- workgroups – includes all resources in the workgroup, with an option to include the resources in all child workgroups (subworkgroups)
- roles – includes all resources with the selected role

About granting access to Client Portal users

Unlike resources, who have access to shared request templates by default, Client Portal users must be granted access. You can grant access to all Client Portal users, individual Client Portal users, or to all Client Portal users for one or more companies.

Specifying access settings for a shared request template

1. Access the request templates.
2. Right-click the shared request template and then select **Edit request template settings**.

   The **Edit Request Template Settings** dialog box appears.
3. Click the **Access** tab.
4. Complete the fields as required. For more information, see "Create/Edit Request Template Settings dialog, Access tab options" on page 35.
5. To restrict access to specific resources, in the **Assigned to the following resources** section, select the resources, roles or workgroups.
6. To grant access to all Client Portal users, select the **Available to all Client Portal users** check box.
7. To grant access to individual Client Portal users:

   a. Clear the **Available to all Client Portal users** check box.

b. In the **Assigned to the following resources** section, expand the **Companies** folder and select the users or companies.

8. Click **Save**.

Create/Edit Request Template Settings dialog, Access tab options

Option	Description
Set the request creator as request initiator check box	When selected, the name of the resource who creates the request is automatically set in the **Initiator** field.
Available for creating requests check box	When selected, resources can select the request template to create requests.
Mandatory for creating requests check box	When selected, the request template must be used by all resources to create requests. If there is more than one mandatory request template, then the priority determines which request template a resource must use.
Available for editing requests check box	When selected, resources can select the request template to edit requests.
Mandatory for editing requests check box	When selected, the request template must be used by all resources to edit requests. If there is more than one mandatory request template, then the priority determines which request template a resource must use.
Available to all Client Portal users check box	When enabled, grants access to all Client Portal users. When cleared, grants access only to the Client Portal users that are selected in the **Assigned to the following resources** section.
Assigned to the following resources section	Restricts access to the resources that are selected, either directly or through workgroups or roles. Grants access to the Client Portal users that are selected, either directly or though companies.

Option	Description
Search field	Used for searching for resources or Client Portal users.
Include children check box	When selected, includes the resources in all of the subworkgroups of the selected workgroups.

Editing the priority of mandatory request templates

The priority for mandatory request templates is automatically assigned in the order in which the request templates are created. You can edit the priority of request templates separately for creating requests and editing requests.

1. Access the request templates.
2. Do one of the following:
   - To edit the priority of request templates for creating requests, right-click in the request template table and select **Prioritize for creating requests**.

     The **Prioritize for Creating Requests** dialog box appears.
   - To edit the priority of request templates for editing requests, right-click in the request template table and select **Prioritize for editing requests**.

     The **Prioritize for Editing Requests** dialog box appears.
3. Select the request templates and then click the up arrow to raise their priority, or click the down arrow to lower their priority.
4. Click **Save**.

Editing a request template

You can edit all of the settings in a request template. The changes to the hide options on the template apply to both existing requests and new requests that are created with the template. However, changes to the preset field values apply to new requests only.

1. Access the request templates.
2. You can do only one of the following:

- To specify or change your default request template, click the **Default** cell for the template.
- To be prompted to select a request template when creating requests, select the **Prompt for request template** check box.

3. To edit the request template settings only:
   a. Right-click the template and select **Edit request template settings**.

      The **Edit Request Template Settings** dialog box appears.

   b. Make the necessary changes.
   c. Click **Save**.
4. To edit both the preset field values and request template settings:
   a. Right-click the template and select **Edit request template**.

      The **Edit Request Template** dialog box appears.

   b. Make the necessary changes.
   c. Click **Save**.

      The **Edit Request Template Settings** dialog box appears.

   d. Make the necessary changes to the template settings.

Deleting a request template

After you delete a request template, if you access requests that were created with the template, the groups, sections or tabs that were previously hidden will be displayed.

1. Access the request templates.
2. Right-click the template and select **Delete request template**.
3. Click **OK** to confirm.

5. Support Items and Data Analysis

About support items

You create support items based on information from closed or canceled requests, or the overall support process. The different types of support items include technical notes, documentation, tools, and frequently asked questions (FAQ) documents.

After a support item has been created, a reminder appears in the **My Reminders** portlet of support desk managers, who must either approve or reject the support item. Approved support items appear with a check mark in search results. Rejected support items are deleted. Only approved support items are displayed in Client Portal.

About accessing support items

You can access support items the following ways:

- Using the Support Search. For more information, see "Searching for a support item" on page 40
- Running the following **Support Desk** reports:
  - **Public Support Items**
  - **Support Items by Type**
  - **Unapproved Support Items**

  For more information, see "Running a standard report" in the *User Basics User Guide*.

About the support search

You use the support search to search for requests and support items.

The following fields are searched:

- requests: **Description**, **Details**, **Reason** and **Resolution** fields, and the **Comment** field of the request history
- support items: **Title**, **Keywords**, **Description**, and **Resolution** fields

The name and description of all attachments are searched, as well as the content of attachments of the file types .doc, .xls, .txt, .htm, and .ppt. The content of other file types (for example, .docx, .xlsx, .pptx, .zip, and .pdf) are searched if your Changepoint installation has been configured to support them.

Note: You might not be able to locate a newly-created support item using a keyword or content search. Keywords and attachment content are available only after certain system updates are run, which typically is at least daily. If necessary, try searching on other relevant fields instead.

The support search results display by search rank in descending order, starting with the most relevant search result. The rank is calculated based on the frequency and total occurrences of unique words that match the search criteria.

Support search guidelines

Searches are not case sensitive. The words “a”, “is”, and “the” are ignored.

Note: You cannot use two operands in a row between search terms.

Search objective	Example search text
To search for a single word (SQL)	sql
To search for an exact multiple word phrase (SQL Server), use quotation marks.	“SQL server”
To search for a partial word (all words that begin with “Change”), use an asterisk (*).	“Change*”
To search for two words (cookies, browser) that are in the same sentence, but not necessarily next to each other, use "near."	cookies near browser
To search for results that include two words (Changepoint, Microsoft)	Changepoint and Microsoft
To search for a word, but exclude the results that include another word, use "and not."	server and not sql
To search for one word or another, use "or."	asp or portal

Searching for a support item

1. Click **Requests** > **Support Search**.

   The **Support Search** appears in the folders view.

2. In the **Search word(s) or phrase** field, enter the search text.
3. In the **Results per page** list, select the number of search results to display per page.
4. To display the search results in a new window, select the **Display results in new window** check box.
5. To include all requests and support items in the search, click the **Select all** check box.
6. To search for requests:
   a. In the **Search scope** section, select the **Requests**check box.
   b. To restrict the search to specific request types, select one or more request types.
   c. To restrict the search to specific products, select one or more products.
7. To search for support items, do one of the following:
   - To search for all support item types, in the **Search scope** section, select the **Support items** check box.
   - To restrict the search to specific support item types, in the **Search scope** section, select the check boxes for the support item types.
8. Click **Search**.

   The **Support Search Results** view displays with the search results.
9. To access the support item or request, click the link in the **Type** column.

   The support item or request profile appears.

To search for an item based on when it was last updated

1. To search for items that were updated within the last [n] number of days, enter the number of days in the **Within the last** field.
2. To search for items that were updated within a date range:
   a. In the **Search scope** section, select the **Date range** check box.
   b. Enter the start date and end date.
3. To search for items updated since a specific date:
   a. In the **Search scope** section, select the **Date range** check box.

b. Enter the start date only.

4. To search for items updated before a specific date

   a. In the **Search scope** section, select the **Date range** check box.

   b. Enter the end date only.

Creating a support item

You can create a support item from a closed or canceled request or from the **New** menu. When you create a support item from a request, the information from the request is automatically entered in the fields of the support item.

1. Do one of the following:

   - Click **New** > **Support item**.
   - Access the closed or canceled request profile and click **Actions** > **Create** > **Support item**.

   The **Create Support Item** dialog box displays the **General** tab.

2. Complete the fields as required. For more information, see "Create/Edit Support Item dialog box options" on page 42.

3. Click **Save**.

Create/Edit Support Item dialog box options

Option	Description
Type list	Type of the support item.
Request number field	If the support item was directly created from a request, number of the originating request.
Public check box	When selected, all resources can view the support item.
View in Client Portal check box	When selected, Client Portal users can view the support item.
Title field	Title of the support item.

Option	Description
Keywords field	Words that can be used as search criteria. Keywords must be separated with a semicolon(;).
Description field	Brief description of the support item.
Details tab, **Resolution** field	Details about the resolution of the support request.

Attaching a file to a support item

1. Access the support item.
2. Click **Actions** > **Attach file**.

   The **Upload Attachment** dialog box appears.
3. Click **Browse** to locate and attach the required file.
4. In the **Description** field, enter a brief description of the file attachment.
5. To restrict access to the attachment to yourself, select the **Private** check box.

   Only the person who uploads the attachment can view a private attachment.
6. Click **Upload**.

   The attachment is added to the support item.

Editing a support item

You can only edit support items that have not yet been approved. After a support item has been approved, it can only be edited by a support desk manager.

1. Access the support item.
2. Click **Actions** > **Edit**.

   The **Edit Support Item** dialog box appears.
3. Make the necessary changes.
4. Click **Save**.

Deleting support items

After a support item has been approved, it can only be deleted by a support desk manager.

1. Access the support item.
2. Click **Actions** > **Edit**.

   The **Edit Support Item** dialog box appears.
3. Click **Delete**.
4. Click **OK** to confirm.

Approving a support item

1. Access your **My Reminders** portlet.
2. Click the **You have support items to approve** link.

   The **Support Item Approval** view appears.
3. To view a support item:
   a. Click the link in the **Type** column. The support item profile appears.
   b. To return to the **Support item approval** view, click .
4. To approve support items, select one or more rows, and then click **Approve selected**.
5. To reject support items, select one or more rows, and then click **Reject selected**.

6. Managing Internal and External Assets

About managing assets

Asset profiles allow you to track the hardware and software assets within your organization's internal departments and for external companies. Asset creation enables you to submit work requests for issues associated with the specified hardware or software.

Asset information is available in the following sections:

- In the **Assigned assets** section of the company profile.

  This section displays all assets that have been assigned to the company.

- In the **Assigned assets** section of the contact profile.

  This section displays only the assets that have been assigned to the contact.

Accessing an asset

In the assets view, assets can be sorted by assignee, asset type, asset number, or manufacturer. In each view, the assignee, asset type, asset number, manufacturer, model, and serial number is displayed. The **Assets by assignee** and **Assets by manufacturer** views also indicate the date the asset was assigned.

1. Click **Requests** > **Asset**.

   The assets view displays by default all assets by assignee.

2. To change the view, click **Actions** and select one of the following views:

   - By asset type
   - By asset number
   - By manufacturer

3. To return to the default, click **Actions** and select **By assignee**.

Creating an asset

1. Click **New** > **Asset**.

   The **Create Asset** dialog box displays the **Asset details** tab.

2. Complete the fields as required. For more information see "Create/Edit Asset dialog box options" on page 46.

3. Click the **Optional details** tab.
4. Depending on the **Asset type** you selected, additional information may need to be provided. Complete the fields as required.
5. Click **Save**.

Create/Edit Asset dialog box options

Field	Description
Asset type list	Type of the asset.
Manufacturer field	Organization that supplies the asset.
Model field	Model number of the asset.
Serial number field,	Serial number of the asset
Assigned on field	Date the asset is assigned.
Asset number field	Identification number assigned to the asset within your organization.
Assignee section	Resource, company or contact responsible for the asset.

Editing an asset

1. Click **Requests** > **Asset**.

   The assets view appears.
2. Click the row of the asset to edit.

   The **Edit Asset** dialog box appears.
3. Make the necessary changes.
4. Click **Save**.

Deleting an asset

1. Click **Requests** > **Asset**.

   The assets view appears.

2. Click the row of the asset to delete.

   The **Edit Asset** dialog box appears.

3. Click **Delete**.

4. Click **OK** to confirm.

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