Agent Guide

Learn how to make the best use of your service desk to help your customers
Welcome to Freshservice! We’re excited to have you on board.

Freshservice merges ITIL best practices with a simple and intuitive user experience. As you use it, you’ll discover that the refreshing interface packs a robust integration of ticketing and asset management capabilities. Besides integrating core functionalities like Incident, Problem, Change, Release, Service Request and Asset Management, Freshservice also lets you put your Knowledge Base on the cloud.

We’ve prepared this playbook to help you get started with Freshservice. Along the way, it will also give you some tips and best practices to help your team perform the best it can.

**Note:** You might not be able to access some of the features discussed here unless your account administrator provides you with the necessary access.
Know your Way around Freshservice

Before learning about each individual modules, it is essential to know they key components of the Freshservice UI. This will help you in effectively navigate once you log into the application.

**Sidebar** - You can access all the key modules like Incident, Problems, Change, Release, Reports, Settings, etc. from the sidebar. You can’t customize or rearrange modules in the sidebar.

**Ticket Summary** - This section gives you a glimpse of tickets that come into your service desk. Apart from giving you the number of overdue tickets, it also gives you stats on tickets that are unassigned, open, on hold and due today.

**Recent Activity** - Right below **Ticket Summary**, you can see a list showing the log of recent activity that happened in your service desk.

**Global Search** - With our enhanced global search, you can easily find the information that you’re looking for. To know more about how effective our search is, check out the solution article.

**Calendar** - The calendar icon next to the search bar takes you to the ITIL calendar that lays out all the tasks that are being scheduled by you as well as other teams.
Quick Create Button - The small + New button next to the global search allows you to instantly create an incident, request, problem, change, or release.

Announcements - All internal service desk announcements will be displayed here. If you’re an admin, you can post the announcement and all the agents who are part of the service desk will be able to see the announcement on their dashboard.

Posting Announcements

If you need to notify your customers of an update, you can add an announcement to the Freshservice dashboard and it will be visible to everyone who accesses your service desk portal.

This comes in handy when, for instance, a downtime is expected and you would not want customers to report something that you’re already aware of.

To add an announcement,

- Log into your Freshservice account and click on + New Announcement from the right sidebar of the dashboard.

![Add Announcement Form](image-url)
- You’ll be taken to a page where you can enter the title for your announcement followed by the content which you wish to share with your customers.
- Set the start date and end date for your announcement in order to set how long you want it to be visible to your customers.
- Set visibility permission. You can choose to show the announcement to everyone, or specific agents, or agent groups.

Visibility:
Choose whom you want this announcement to be visible to

- **Everyone**
  This includes all agents and contacts
- **Agents**
  This includes all agents
- **Agents and Specific groups/companies**
  This includes all agents and contacts from the selected groups and companies
- **Also send this announcement by email**

Add Email recipients

Use comma to separate multiple email recipients

- Check **Also send this announcement by email** to email the announcement. Make use of the email recipient field to add the email addresses to which you wish to send the announcement.
- Once done, click **Save**.

**Viewing Assigned Tickets**

If you have tasks assigned to you, it will be visible under the **My Tasks** section present on the left sidebar.

To view a complete summary all your tasks, click on the View All option present on top of the **My Tasks** section.
You can view tasks based on the following status: **Due Today, Overdue, Upcoming, and Completed**

You can click on a task to change its status or assign the task to a different person.

---

**#TSK-3: Conduct Employee Survey**

+ Add Description

Attach file(s)

---

**#PRJ-1 Intranet Site Development**

2 Jun, 2017 09:41am - 14 Jun, 2017 09:41am

Notify: Never

<table>
<thead>
<tr>
<th>COMMENTS</th>
<th>SUBTASKS</th>
<th>DEPENDENCIES</th>
<th>ACTIVITY</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>4</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

Add subtask

- **Research on employee surveys**
  - 5 Jun, 2017

- **Draft survey Questions**
  - 8 Jun, 2017

- **Email employees**
  - 11 Jun, 2017

- **Analyze and document survey results**
  - 14 Jun, 2017

**Note:** You can also create tasks within tickets and assign them to your fellow agents
Keyboard Shortcuts for your Service Desk

Freshservice lets you perform repetitive tasks quickly by using keyboard shortcuts. These shortcuts can be used to navigate your way around your service desk easily and even work with tickets.

You can use these shortcuts with a Standard 101/102-Key or Natural PS/2 Keyboard.

**Quick Tip:** You can pull up the entire list of shortcuts available in Freshservice by hitting the "?" key.

<table>
<thead>
<tr>
<th>Keys</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>g + d</td>
<td>Dashboard</td>
</tr>
<tr>
<td>g + t</td>
<td>Tickets</td>
</tr>
<tr>
<td>g + p</td>
<td>Problems</td>
</tr>
<tr>
<td>g + c</td>
<td>Changes</td>
</tr>
<tr>
<td>g + l</td>
<td>Releases</td>
</tr>
<tr>
<td>g + i</td>
<td>CMDB</td>
</tr>
<tr>
<td>g + s</td>
<td>Solutions</td>
</tr>
<tr>
<td>g + r</td>
<td>Reports</td>
</tr>
<tr>
<td>g + a</td>
<td>Admin</td>
</tr>
</tbody>
</table>

**Shortcuts within Tickets tab**

The below mentioned shortcuts will come handy when you’re inside the **Tickets** module in Freshservice.

<table>
<thead>
<tr>
<th>Keys</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up or k</td>
<td>Move cursor to the previous ticket</td>
</tr>
</tbody>
</table>
*You can select multiple tickets by moving the cursor to the tickets and pressing the ‘x’ key.

Once a ticket has been selected, you can use these shortcuts to perform actions like opening the ticket or assigning the ticket to yourself.

**Shortcuts to Use Within the Ticket View**

Once you open a ticket, you can use these shortcuts to perform actions like replying to the ticket or changing its property.

<table>
<thead>
<tr>
<th>Keys</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>X then @</td>
<td>Assign the tickets to yourself</td>
</tr>
<tr>
<td>X then #</td>
<td>Delete the ticket(s)</td>
</tr>
<tr>
<td>X then ~</td>
<td>Close the ticket(s)</td>
</tr>
<tr>
<td>X then Alt + ~</td>
<td>Close without sending an email notification</td>
</tr>
<tr>
<td>X then !</td>
<td>Mark the ticket(s) as spam</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Keys</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt + right</td>
<td>Go to the next ticket</td>
</tr>
<tr>
<td>Keys</td>
<td>Function</td>
</tr>
<tr>
<td>------------</td>
<td>---------------------------------------</td>
</tr>
<tr>
<td>Alt + left</td>
<td>Go to a previous ticket</td>
</tr>
<tr>
<td>r</td>
<td>Reply to a ticket</td>
</tr>
<tr>
<td>f</td>
<td>Forward a ticket</td>
</tr>
<tr>
<td>t</td>
<td>Add task to a ticket</td>
</tr>
<tr>
<td>n</td>
<td>Add note to a ticket</td>
</tr>
<tr>
<td>w</td>
<td>Add yourself as a watcher to a ticket</td>
</tr>
<tr>
<td>m</td>
<td>Add time to the ticket</td>
</tr>
<tr>
<td>#</td>
<td>Delete a ticket</td>
</tr>
<tr>
<td>~</td>
<td>Close a ticket</td>
</tr>
<tr>
<td>!</td>
<td>Mark ticket as spam</td>
</tr>
<tr>
<td>}</td>
<td>Expand conversations in a ticket</td>
</tr>
<tr>
<td>}</td>
<td>View the activities of a ticket</td>
</tr>
<tr>
<td>p</td>
<td>Edit ticket property</td>
</tr>
</tbody>
</table>

**Common Shortcuts for the Tickets/Problems/Changes/Releases tab**

<table>
<thead>
<tr>
<th>Keys</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up or k</td>
<td>Move cursor to the previous record</td>
</tr>
<tr>
<td>Down or j</td>
<td>Move cursor to the next record</td>
</tr>
<tr>
<td>Alt + right</td>
<td>Go to the next page</td>
</tr>
<tr>
<td>Alt + left</td>
<td>Go to the previous page</td>
</tr>
<tr>
<td>x</td>
<td>Select the record(s)</td>
</tr>
<tr>
<td>Shift + x</td>
<td>Select all the records in the page</td>
</tr>
<tr>
<td>Enter</td>
<td>Open record</td>
</tr>
<tr>
<td>t</td>
<td>Add task to a record</td>
</tr>
</tbody>
</table>
Working with Tickets

You can think of a ticket as a case-sheet that contains the entire history of an issue—right from the minute it was reported to the time it gets closed. Also, every ticket carries a unique ID number that differentiates it from the rest.

Tickets are bifurcated into two distinct categories—Incidents and Service Requests.

- **An incident** can be defined as an unplanned interruption to (or a reduction in the quality of) an IT service. An issue with the WiFi, for instance, is an incident.

- **A service request** is a request from a user for information, advice, a standard change or access to an IT Service. The most common example, arguably, is the good old password reset request.

Creating Tickets

Freshservice allows for the creation of tickets through 3 main channels:

1. **End User Portal** - Users can raise an incident or a service request from the end user Portal.
2. **Email** - Your service desk has a specific email address that the account admin set when they signed up for Freshservice. When a user sends an email to this address, it becomes a ticket automatically.
3. **Phone** - When a customer decides to give you a call to report an incident or, for that matter, just walk over to your desk, you can create a ticket on their behalf.

Apart from the above mentioned channels, as an agent, you can also create incident and service requests on behalf of your customers.
To create an incident ticket or a service request for your customer, log into your Freshservice account and click on the **+ New** button on the top right corner.

In the screen that follows, fill in the necessary details and click **Save**.

**Filtering Tickets**

The **Tickets** tab allows you to filter data based on various parameters. Inside the **Tickets** module, you can see the right sidebar filled with options to filter your tickets. You can filter tickets based on the type (incident or service request), agents, groups, status, priority, etc.
If you wish to save the set search parameters for future use, you can click on the new tick mark present right on the top bar (refer screenshot).

The saved search parameters will be created as a new view which you can later access from the same tab.

**Viewing and updating Tickets**

Apart from creating and filtering tickets, you can also update various parameters of a ticket. You can also select multiple tickets and update information in bulk.

Here are some quick updates you can make to your tickets.

<table>
<thead>
<tr>
<th>Use this</th>
<th>To do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete</td>
<td>Delete ticket(s)</td>
</tr>
<tr>
<td>Pick Up</td>
<td>Assign a ticket to you or to another agent</td>
</tr>
<tr>
<td>Flag Spam</td>
<td>Mark as Spam</td>
</tr>
<tr>
<td>Close</td>
<td>Close a Ticket</td>
</tr>
<tr>
<td>Assign to Agent</td>
<td>Assign multiple tickets to a particular agent</td>
</tr>
<tr>
<td>Bulk Actions</td>
<td>You will find this feature quite handy when you want to update multiple tickets simultaneously. Things that you can change:</td>
</tr>
<tr>
<td></td>
<td>Type</td>
</tr>
<tr>
<td></td>
<td>Status</td>
</tr>
<tr>
<td></td>
<td>Priority</td>
</tr>
<tr>
<td></td>
<td>Group</td>
</tr>
</tbody>
</table>
You can also add a bulk reply to multiple tickets.

| Merge | Use this feature in case you want to merge the selected ticket(s) with another ticket. This is useful in cases a same requester had raised a same issue twice. |

You can also click on **Export** to save ticket data as an Excel spreadsheet or a CSV file.

From the list of tickets, click on the one you want to view or update. This opens the ticket's detailed view that looks similar to this.

You can view everything you need to know about the ticket here - right from its status, priority and due date to the requester’s details.

This view also lets you access more options to update the ticket’s properties. Here’s everything you can view and update here.
If an admin adds additional fields to the ticket creation form, they will also be displayed here.

Assigning Tickets
Once the ticket is created, it shows up in the tickets tab as ‘Unassigned’. It needs to be assigned to an agent from the right team, so that they can start working on it.

Freshservice provides service desk admins with a set of options to automate such tasks. New tickets can be assigned to a specific team (and also the next available agent from that team) by creating simple rules. For instance, if a ticket contains the word “MSSQL”, it can be sent to the Database team automatically using a simple ‘if this then that’ rule.

That said, you can assign multiple tickets to yourself or fellow agents from the ticket list.
Select the tickets you want to assign to yourself (or a fellow agent) and click on Pick Up (or Assign to Agent).

If you’re already at the detailed view of the ticket, you can assign it to a specific agent (or yourself) from the Agent field in Ticket Properties.

Adding Tasks

You can think of a task as a child ticket. Let’s say you receive a ticket that requires an agent from another team to fix some things before you can actually resolve the issue. You can add a task, assign it to an appropriate agent and even set a due date for it.

You can create tasks even if you want to split a complex ticket among your fellow agents for a faster resolution.

To create a task,

1. Click on Tasks below the ticket description and click Add new to access the form.
2. Add a **title** and a **note**.
3. Specify the **status**, the **agent** you want to assign it to and the due date for the task.
4. If you’d like to send a **notification**, select how long before the due date it needs to be Sent.
5. You can even choose to add the task to their **Google Calendar** in case the email address listed for them in Freshservice is for their Google account. Select the corresponding checkbox.
6. Click on **Add**.

### Attaching CIs

Most issues that customers raise tickets for pertain to a specific device. And if you can add information about the device within the ticket, that makes it easier to track the impact, past issues etc.

This is where Freshservice’s highly integrated Asset Management comes in. You can actually link the exact Configuration Item (CI) to the ticket. Here’s how you do that.

1. Click on the **CI** button under the ticket description and then click **Associate a CI**.

   ![Ticket with CI button](https://via.placeholder.com/150)

   **ERC Down**
   Carlos.stuart reported 5 months ago (Wed, 29 Nov, 2017 at 3:21 PM) via Portal
   
   I am unable to access the ERC.

<table>
<thead>
<tr>
<th>BIVIL</th>
<th>Used By</th>
<th>Low</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dell laptop XV1</td>
<td>Used By Dave</td>
<td>Low</td>
</tr>
</tbody>
</table>

2. Select the item’s category from the drop-down menu or search for its name.
3. Select the item from the list and click **Submit**.
When the CI is linked to the ticket, the ticket gets added to the list of requests for the CI in the Database.

Adding Private Notes

It’s a good practice to add details about the troubleshooting you performed in the ticket. You can maintain logs of the progress made by adding private notes on the ticket. You can also use notes to discuss the ticket with other agents.

To add a private note,

- Go to the ticket’s detailed view and click on the Add note link under the ticket Description.
- Type the note and format it.
- You can insert images (screenshots of the error message etc.) and also link a solution article (to show the steps you might have tried).
- You can even attach a file either from your computer or from your Dropbox account.
- If you’d like to notify a fellow agent about the note, enter their name in the Notify Agents Section.
- When you’re done, click on Add Private Note.

Quick Tip: You can also change the status of the ticket while submitting the note. Click the arrow next to the button for options.
Adding Non-Invasive updates using public notes

Some customers like to be on top of every stage that their ticket passes through. But sending out email notifications for every status update could be quite intrusive.

You can send email replies just when you need additional information from them, or have to notify them about a major status change. For the rest of the progress on the ticket, add a public note. To do this, toggle the Visible to the customer switch to YES.

The customer will be able to see these notes when they view the ticket on the portal to track its Progress.

Replying to Tickets

When a ticket gets assigned to you, one of the first things you would want to do is send a response.

Freshservice lets you send rich text replies to requesters. You can bullet the instructions and bold, italicize and underline key phrases to highlight them. You can Cc and Bcc your fellow agents if they need to be notified. You can link solution articles in the response or choose from a list of canned responses.

You can also attach files from your computer to add more context to your reply.
Inserting Solution Articles into your responses

If your knowledge base contains a solution article that might help resolve the issue reported in the ticket, you can insert the article right in the ticket.

To insert a solution article, click on the open book icon present on the top right corner. You’ll be provided with the option to choose the solution article of your choice and add it to the reply.

Using Canned Responses for Replying

Canned responses can be used to quickly insert reply templates into your messages. They can be added by the service desk admin and be customized to add the requestor’s name, agent’s signature and ticket details using dynamic content placeholders.

To insert a canned response, click on the Canned Response icon present on the top right corner (next to the Insert Solution option)
Following Tickets and Adding Watchers

There may be times when you might want to follow the progress on a ticket, even if it’s assigned to another agent in your team. In Freshservice, you can ‘watch’ specific tickets and even add your fellow agents as watchers.

If you’d like to add yourself as a watcher on a ticket, go to it’s detailed view and click the star icon from the top navigation pane. Then click on the Add users field and select ‘Me’. To add a fellow agent, select their name from the list.

Merging Tickets

Let’s say an issue gets reported multiple times, by members of the same team. Or a requester raises a new ticket instead of following up on an existing one.

The following things happen when you merge tickets.

1. One of the tickets (you get to choose which one) becomes the primary ticket. The others become secondary.
2. All conversations from all the secondary tickets are moved to the primary ticket.
3. All the secondary tickets are closed.
4. All messages are sorted chronologically.
5. A note is added to each of the secondary tickets with a link to the primary ticket.
6. If the note is public, an email notification might be sent to the requesters about the merged tickets.
In such cases, you can ‘merge’ the new ticket to the original one. Here’s how:

1. From the detailed view of the primary ticket, click on the More button in the top-right corner and choose Merge from the drop-down menu.

2. In the window that pops up, search for, and select the tickets that you want to merge from the right pane. As you do, a check mark will appear next to them.

3. On the left pane, click the big check mark next to the ticket you want to mark as primary.

4. If you inadvertently select a ticket that does not need to be merged, click on the red minus sign next to it to remove it from the list. Once done, click Continue.

5. On the next page, check if the changes you made are okay. You can even edit the notes that will be added to the primary and the secondary tickets.

6. Click on Confirm and merge to save the changes.
Execute Scenario Automations

Scenario Automations let you carry out a bunch of pre-set updates to a ticket with a single click. It is especially helpful in case of recurring scenarios where you have to carry out the same series of tasks every time.

Scenario automations are usually created by a user who has admin access. The option can be accessed from **Admin Settings** under **Helpdesk Productivity**.

To execute a scenario automation,

1. go to the ticket's detailed view, click on the **More** button in the top-right corner and choose **Scenarios** from the drop-down menu. The scenarios automations created under **Admin Settings** will be displayed here.

2. In the window that pops up, hover over and click the **Execute** button next to the scenario you’d like to run.
Adding time entries to track the time spent on tickets

Freshservice lets you add time entries to track the time spent on tickets by each agent (handling specific tasks). This helps you get an idea of the overall service desk performance. And adding a timer to tasks (or the entire ticket, for that matter) is pretty easy.

1. From the ticket’s detailed view, click on **Time tracked** in the bottom-right corner and then click **Add time**
2. In the **Add time** window, select the **Task** you want to track. The **Agent** field will change to the corresponding agent automatically.
3. Add the ‘Start’ time in the **Hours** field and select the **Billable** checkbox to log the entry as billable in the Time Sheet Report.

4. Select a **Date** (the current date is filled in by default).
5. Add a **Note** to label the time entry and click on **Start Timer**.
When you add a new time entry, it stops all the existing timers. You can **start** and **stop** the timers manually; and also **edit** or **delete** them if required. Just hover over a time entry in the ticket’s detailed view to get these options.

Click on the red stopwatch icon to stop the timer and the trash can icon to delete it.

Once a timer is stopped, you can click on the green stopwatch icon to start and the pencil icon to edit it.

**Editing Tickets**

You can edit most of a ticket’s properties right from its detailed view. To access options to edit all of the ticket’s attribute, including its subject line and requester, click on the More button in the top-right corner and click **Edit**.

**Printing Tickets**

If you need a hard copy of a ticket, Freshservice lets you print it out. To do that, click on the **More** button in the top-right corner and click **Print**. This displays a print preview.
Resolving and Closing Tickets

Your primary objective is to resolve the issue and restore normal service operation as soon as possible.

When you do, you can change the ticket’s status to resolved from the Ticket Properties Section.

If you’d like to add a note summarizing the ticket resolution, you can mark the ticket as resolved while saving the note. Click on the arrow next to the Add Private/Public Note button and click on Add and set as resolved.

When you set a ticket as resolved, an email notification with the customer satisfaction survey will be sent to the requester where he/she can rate your support.

If they do not respond to the mail, the ticket gets closed automatically after 48 hours. You can close it manually at any time by clicking on the Close button at the top.

Linking Tickets to Problems and Changes

Simply put, a “problem” is a cause of one or more incidents.

Let’s say, many similar incidents get reported, and after troubleshooting, you discover that they were caused by a larger underlying problem. Check to see if the problem has been documented in Freshservice under the Problems tab. If not, create one, and link all the tickets to it.

Doing this helps the team prioritize and manage the problem better.
1. Click on the **Associate** dropdown at the top and select **New Problem** or **Existing Problem** based on your preference.

2. If you choose **Existing Problem**, you'll be shown a list of available problems in your service desk. You can choose the problem you would like to link the ticket and click on **Link**.

3. If you select **New Problem**, fill the form to create the problem and click on **Link**.

When a problem is documented, root cause analysis is done for it. This often results in the problem management team suggesting a “change” that is required to resolve the problem (thereby preventing more incidents from being caused by it).
Linking all associated incidents to a change helps manage the change better. And doing this is pretty similar to linking incidents to problems.

To link a change to a ticket, click on the Associate dropdown and choose from one of the following options:

- New Change
- Existing Change

After creating a new change, or selecting an existing change, click on Link.

Using email commands to update ticket properties

Email Commands in Freshservice offer a way to perform activities on a ticket right from your inbox, by simply adding a one line command while responding to a mail. The activity can be anything like changing the status of a ticket, assigning it to an agent or adding a note to it.

Email commands can be set by Admin from Settings > Email Commands.

The Email Command text will not be seen by the requestor.

Let’s look at it with an example.

**What you send:**

Hi John,

@Simonsays "status":"pending", "priority":"medium" , "agent":"Robert" @Simonsays

Thank you for getting in touch with us. We have escalated your issue and we will fix things up right away.

Thanks,
James

**What the customer sees:**

Hi John,

Thank you for getting in touch with us. We have escalated your issue and we will fix things up right away.
Thanks,
James
Meanwhile, Freshservice identifies your email command and as instructed, changes the status of the ticket to pending, marks it as medium priority and assigns it to Robert. The rest of your email content will be added as a conversation to the ticket and also sent to the requestor via Email.

All email commands should be in the syntax mentioned above. @Simonsays is the default delimiter text within which the actual command text needs is inserted. This can be changed by the admin.

Here is the list of email commands (along with examples of possible values):

- **Status**: Pending [changes the status of the ticket to Pending]
- **Priority**: Medium [changes the priority of the ticket to Medium]
- **Agent**: Robert [assigns the ticket to Robert]
- **Group**: Sales [assigns the ticket to the Sales group]
- **Source**: Email [changes the source of the ticket to Email]
- **Type**: Incident [changes the type of the ticket to Incident]
- **Associate_ci**: {Serial_no=123, User=andrea@freshservice.com, Name=Andrea's Laptop} [associates the specified CI to the ticket]
- **Action**: Note [adds a private note to the ticket]

**Working with Problems**

As we discussed earlier, a problem is the cause of one or more incidents. Once a problem has been documented, all the relevant details need to be added for the root cause analysis to be effective. Then a workaround or a permanent solution needs to be determined to solve the problem.

This section talks about Problem Management in Freshservice.

**Creating Problems**

In the previous section, we discussed the process of creating a problem from a ticket’s detailed view. If no incidents have been reported for a problem yet, you can create a fresh problem.

The process of identifying significant problems by analyzing incident records and data collected by other IT Service Management processes is called **Proactive Problem Management**.

To create a new problem,
1. Click on New in the top-right corner and select **Problem**.

![Image of problem creation interface]

2. Fill the form to create the problem and click on **Save**.

**Adding Incidents to a Problem**

Understanding the impact of a problem becomes way easier if you can see all the incidents caused by it. And linking tickets to a problem is extremely easy:

1. From the problem’s detailed view, click on the **Incidents** button below the problem description. If no incidents are linked to the change, click on **Link new**. (If there are incidents attached to the problem already, click on **Link** to Incidents)
2. In the ticket list that pops up, select the incidents you’d like to link to the problem and click on **Link**.

The linked tickets will be displayed under the **Incidents** button. If you need to detach an incident later, hover over it and click the ‘minus’ sign next to it. Then click on **Detach**.

**Adding the root cause, impact and symptoms to the problem**

Besides knowing which incidents were caused by the problem, some more information is required to resolve it. The most important piece of information is the “root cause” of the problem, which is identified by performing root cause analysis. You’d also want to document the impact and symptoms of the problem in detail.

To add the **Root Cause**, the **Impact** and the **Symptoms**, click in the corresponding box, enter the information and click **Add**.
Adding workarounds and permanent solutions

Once the problem's details are in place, finding a solution to the problem becomes easy. A workaround can be provided for problems that cannot be resolved instantly.

You can link a solution article from your knowledge base and as a workaround or a permanent solution for the problem, or add a solution of your own.

To add a workaround or a permanent solution,

1. Go to the problem's detailed view and click on **Permanent/Workaround** under **Solutions**.
2. If the solution exists in your knowledge base already, **search** for the article and click the paperclip icon to link it. If it does not, click on **Add a new solution** and skip to the next Step.
3. If a new solution needs to be added, click on **Add a new solution**. Then type in the **solution title**, select an appropriate **folder** for it from the drop-down menu and enter the steps in the **Description** field. Once you're done, click on **Add**.
Marking Problems as Known Errors

Depending on factors like business impact, cost of the solution and ROI, implementing the solution immediately might not be feasible. Until it is, you can use the workaround and mark the problem as a “known error”.

From the problem’s detailed view, toggle the “Is this a known issue?” switch to YES.

Linking Problems with Changes

The permanent solution to a problem might involve bringing about a change. Some problems might call for a major change, like replacing a server, etc. while other problems might be resolved by simply installing a specific update or a service pack.

You can link problems with an existing change or create a new one from the problem’s detailed View.

To create a new change for a problem,

1. Click on the Change button at the top and select New Change.
2. Fill the form to create the change and click on **Submit**.
3. To link an existing change, click on **Change** and select **Existing Change**. Then select the change from the list and click on **Link**.

### Link to an existing Change

<table>
<thead>
<tr>
<th>Search</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>DNS server reconfiguration #CHN-18</td>
<td>Open</td>
</tr>
<tr>
<td>New change - Hot fix #CHN-17</td>
<td>Closed</td>
</tr>
<tr>
<td>Router issue - Hot fix #CHN-16</td>
<td>Closed</td>
</tr>
<tr>
<td>server connection slow #CHN-15</td>
<td>Open</td>
</tr>
<tr>
<td>Network slowness - Replace server #CHN-14</td>
<td>Open</td>
</tr>
<tr>
<td>internet down #CHN-4</td>
<td>Closed</td>
</tr>
<tr>
<td>New DB set up #CHN-3</td>
<td>Closed</td>
</tr>
<tr>
<td>sample #CHN-2</td>
<td>Closed</td>
</tr>
<tr>
<td>change for support #CHN-5</td>
<td>Awaiting Approval</td>
</tr>
<tr>
<td>change for support #CHN-6</td>
<td>Awaiting Approval</td>
</tr>
<tr>
<td>change for support #CHN-9</td>
<td>Pending Approval</td>
</tr>
</tbody>
</table>

### Closing Problems

If the change requested for a specific problem is completed and closed, you can close the problem (and all the other problems that might be linked to the change). If no change is associated with a problem, you can close it once it is resolved.

A problem can be closed by either of these two methods:

- Click on **More** in the top-right corner of the problem’s detailed view and click **Close**.
- Click on the **Status** drop-down and select **Closed**. Then click on **Update**.
Working with Changes

A change is essentially an addition, modification or removal of anything that can affect IT Services. The scope should include changes to all architectures, processes, tools, metrics and documentation, as well as changes to IT services and other CIs.

Changes can be standard (low-risk, pre authorized or recurring changes) or non-standard (emergency changes).

Once a change is requested for, elaborate planning is required for its execution. And just in case everything does not go as smoothly as planned, having a backout plan helps you stay prepared.

Let’s see how Change Management works in Freshservice.

Creating Changes

To create a new change,

1. Click on New in the top-right corner and click Change.

2. Enter the details for the change in the form and click on Save.
Adding problems to a change

Once a change is requested for, adding all the problems that triggered it helps add context to the request. If the change request is initiated from a problem’s detailed view, it is linked to the change automatically. You can add the others manually.

To add problems to a change,

1. Go to the change’s detailed view and click on Problems under the description.
2. If there’s no problem linked to the change yet click on Link new. (If there is, click on Existing Problem)
3. In the list of Problems that pops up, select the ones that need to be linked and click on Link.

The linked problems can then be viewed by clicking on the Problems button. If a problem needs to be removed from this list, hover over it, click on the ‘minus’ sign next to it and click Detach.

Adding Incidents to a Change

You can even add associated incidents to a change to provide a more complete picture. You can add two types of incidents.

- Incidents that initiated the change request.
- Incidents that were caused by the change.

To add incidents to a change,

1. Go to the change’s detailed view and click on the Associated Tickets button. Select the appropriate option to add the incident - Initiating the change or Caused due to the Change
2. From the list of incidents that pop up, select the ones that you need to link to the change and click on **Link**.

**Adding planning details**

Once a change request is initiated, you need to plan the implementation of the change before you can send it for approval. As you do, keep updating the change entry in Freshservice.

On the change’s detailed view, you can add the following planning details:

- Reason for Change
- Impact
- Rollout Plan
- Backout Plan

To add planning details to a change,

1. To add these details to the change, visit the change’s detailed view and click in the corresponding box.

2. Enter the information and format it. Attach any relevant file that might provide additional information by clicking on **Attach file**. Click **Add** once done.
Requesting for approval from a CAB member

Once you have the change rollout and backout plan in place, you need to get it approved by one or more members of the CAB (Change Advisory Board). Depending on the nature of the change, its impact, risk etc. the approval request might be sent to a manager, supervisor or even the head of the concerned department.

To initiate a request for CAB approval,

1. From the change's detailed view, scroll down to the Approvals section and click on **Request for CAB Approval**.
2. Select a CAB from the drop-down menu to get a list of its members. Select the checkbox corresponding to the one you need the approval of and click **Send**.

This sends an auto-generated mail to them. They check to make sure the change does not conflict with other changes or releases that might be coming up and that the plan is exhaustive. Once they approve the request, it reflects on the change's detailed view and you can start planning the release process.

Link to a release

After the change request is approved by the CAB member(s), the change needs to be linked to a release - one that contains all details about the actual deployment.

You can link the change to an existing release or add a new one from the change's detailed view.

To create a new release for a change,
1. Click on the Release button at the top and select **New Release**.

2. Fill the form to create the release and click on **Link**.

3. To link an existing release, click on **Release** and select **Existing Release**. Then select the release from the list and click on **Link**.

**Adding Review Note After Release**

Once the release is completed successfully, you can review the change’s rollout process and effect and add a note summarising it. This note can contain details like how seamless the plan execution was and whether any new incidents were caused by the change or the release.

Follow the below mentioned steps to add a review note:

1. Once a release is linked to the change, the “Release Info” section gets added to the change’s detailed view. Scroll down to it.
2. Click on **Add Review Notes** and add the notes. You can even format the notes and attach relevant files. Click on **Add** when done.
Closing Changes

After the release associated with a change is completed, i.e. after the change is made, you can close the change.

A change can be closed by either of these two methods:

- Click on **More** in the top-right corner of the change’s detailed view and click **Close**.
- Click on the **Status** drop-down and select **Closed**. Then click on **Update**.

Working with Releases

A Release is essentially a collection of authorized Changes to an IT service, which are tested and introduced into the live environment together. Once a change has been approved, release management plans, schedules and controls the movement of the release so that the integrity of the live environment is protected.

This is how Release Management works in Freshservice.

Creating Releases

You can create a release for an existing change, from the change’s detailed view. You can also create a new, isolated release and link changes to it later.
To create a release,

1. Click on New in the top-right corner and click Release.

2. Enter the details for the release in the form and click on Save.

Adding changes to a release

Once a release is in the pipeline, adding all the associated changes to the release, helps plan the release better. If the release was already created from a change’s detailed view, it is linked to the release automatically. You can add the others manually.

To add a change to a release,

1. Go to the release’s detailed view and click on Changes under the description.
2. To link a related change to the release, click on Link New. (If there already are changes linked to the release, click on Existing Change)

The linked changes can now be viewed by clicking on the Changes button in the release’s detailed view. If a change needs to be removed from this list, hover over it, click on the ‘minus’ sign next to it and click Detach.
Adding build plan and test plan

Once a change is approved and the release is awaiting deployment, you need to plan ahead and make sure you’re ready to face any possible disruptions to the deployment.

On the release’s detailed view, you can add the following planning details:

- Build plan
- Test plan

To add a build plan and a test plan

1. To add these details to the release, visit the release’s detailed view and click in the corresponding box.

2. Enter the information and format it. Attach any relevant file that might provide additional information by clicking on **Attach file**. Click **Add** once done.

Working with Assets

An asset is basically a resource or capability that has a financial value and a lifecycle. For instance, a computer is an IT asset and so is a software application installed on it, or a printer connected to it.

Freshservice helps you with Asset Management by providing a Configuration Management Database (CMDB) that helps you manage Configuration Items (CIs). You could think of a CI as an asset that you need to track and manage in order to deliver IT services.
Creating CIs

Freshservice lets you add and track details like ownership, maintenance, cost, relationships with other CIs etc. all the way to the end of the CI’s lifecycle.

To add a CI,

1. Go to the **CMDB** tab from the left sidebar and click on the **Add New** button present on the top-right corner.
2. In the ‘**Add New**’ form, fill the details of the CI you want to add and upload any relevant file. Click on **Save** when done.

Accessing CI details

Asset Management in Freshservice is fully integrated with its other modules. So, for every Ticket, Problem, Change and Release, you can link the associated CI, to get a better idea of its impact. Then you can access the CIs detailed view with the click of a button.

You can even go to the CMDB tab and click on the CI directly. The detailed view shows an overview of the CI with information like its cost, specifications etc.
You can click on one of the tabs in the left pane to view specific details, which are:

- **Relationships** - All the other CIs that are related to the CI (and might be affected when it is updated or removed).
- **Software** (For a ‘Hardware’ CI) - The software applications installed on the device.
- **Components** (For a ‘Hardware’ CI) - The components of the device.
- **Requests** - All the Tickets, Problems, Changes and Releases the CI is linked to.
- **Contracts** - All the contracts the CI is associated with (see section 7).
- **Expenses** (For a ‘Hardware’ CI) - The expenses incurred for purchase, maintenance, support, disposal etc.
- **Activity** - A complete log of all the activity performed on the CI

Analyzing impact using relationship maps

An important part of managing CIs is the ability to understand relationships between them. This information is really crucial while updating and replacing CIs.

Freshservice lets you view a relationship map that shows all parent and child CIs that are associated with a particular CI. It helps you track dependencies and foresee the impact of Changes.
To view the relationship map of a CI,

1. Go to the **CMDB** tab and click on the CI to go to its detailed view.
2. In the left pane, click on the **Relationships** tab. This shows the visual map that lists out all the CIs related to it.
3. To add one or more CIs to a relationship, click on **Add Relationships**. Then select a relationship or an inverse relationship from the list.
4. From the list of CIs that pops up, select the checkboxes corresponding to the ones you need to add and click on attach.

You can detach a CI by switching to the ‘list’ view, hovering over the CI and clicking on the **trash can** icon that shows up next to it.

**Working with Contracts**

The Freshservice Contract Management module lets you manage contracts established with third party vendors. Here’s how the Contract Management module works:

**Adding New Contracts**

Freshservice supports three contract types: **Lease**, **Maintenance** and **Software License**.

Here’s how you create a new contract:

1. Click on the **CMDB** tab from the left sidebar and click on **Contracts**.
2. Click on **Add new**
3. Enter the details for the contract into the form. The fields of the form vary according to the type of contract.
4. Attach any relevant file like the terms and conditions and add associated CIs. The contract will be displayed in the CIs’ detailed view.
5. If you’d like Freshservice to send you (or other stakeholders) a notification before the contract expires, select the checkbox next to **Notify contract expiry**. Then select the number of days and enter the email addresses. Note that you can add email addresses of third-party vendors too.

In the lifecycle of a contract, it goes through a lot of changes in its status.

- The status of the contract will remain as **Draft** until it is sent for approval. As long as it is a draft, the contract can be modified.
- Once it is sent and the status is changed to **Pending Approval**, no more changes can
be made to the contract, except for adding more CIs or deleting the entire contract.

- Once the contract is approved or rejected by the approver, the status changes to **Approved** or **Rejected** accordingly.
- However, even after it is approved, the status of a contract becomes **Active** only when the current date is the same as the contract start date. The **Contract Scheduler** checks the ‘start day’ for all approved contracts on a daily basis and when it is the same as the current date, it sets the contract as active.
- A contract stays **Active** from its start date to end date, after which the status is automatically changed to **Expired**.
- If you need to replace a contract with a newer one, you can **Terminate** it from its detailed view.

**Tracking contracts**

You can track your contracts by filtering them according to their status.

1. Click on the **CMDB** tab and click on **Contracts**. All **Active Contracts** are displayed by Default.
2. You can click on the drop down arrow to view contracts which are **Expired** or a list of **All Contracts**.
3. After you locate the contract you need from the list, click on it to go to the detailed view. You can access all available information about the contract here.

![Active Contracts Table]

**Working with the knowledge base**

A **knowledge base** is exactly what it sounds like: a shared collection of tried and tested solutions that have been documented for future reference. The primary purpose of a **knowledge base and knowledge management**, is to improve efficiency by reducing the need...
to rediscover knowledge.

Customers can easily locate solutions in the Freshservice Knowledge Base on their own without having to wait for an agent to attend to their issue. And as discussed in section 2.9.1, instead of typing out solutions every time, agents can also save a lot of time by simply linking relevant Knowledge Base solutions in their ticket responses to customers.

Here’s how the Freshservice Knowledge Base works.

Adding Categories
The solutions in your knowledge base are broadly grouped under categories. This makes it easier for both customers and agents to isolate and identify the solutions they’re looking for.

To add a new category:

1. Click on the Solutions tab from the left sidebar and click on the New solution category button.

2. Enter a Category name and a Description.
3. Click on the Save button to create the new category or Save and create another to add more categories.
4. You can further edit the name or description of the category by clicking the Edit button next to the newly created category.

Adding Folders
The various categories in your knowledge base, are further divided into folders. This is how you add new folders under existing categories.

To create a folder,

1. All the categories in your knowledge base appear when you click on the Solutions tab.
2. Click on the Add folder button next to the category for which you wish to create a folder.
3. Enter a name, description and click on the drop down box to set visibility for the new Folder.
4. Click on the **Save** button to create the new folder or **Save and create another** to keep creating new folders.
5. You can further edit the details of the folder by clicking the **Edit** button next to the folder.

Creating Solution Articles

Freshservice Knowledge Base solutions are grouped under a three tier hierarchy: **Categories** - **Folders** - **Solutions**.

Here’s how you create new solution articles for your knowledge base.

1. Click on the **Solutions** tab and click on the **folder** you wish to populate with a new solution article.
2. Click on **Add solution**.
3. Enter a title, description and attach any necessary files. Decide who can view the solution article and click on the drop down box to set visibility accordingly.
4. Set the **solution status** as **Draft** if you want to keep editing it, or as **Published** if you wish to publish it right away.
5. You can further edit the solution by clicking the **Edit** button next to the article.

Tagging and Editing Visibility

In order to make it easier to locate and search for individual solutions, you can add tags when you create new solution articles. You can also keep adding new tags to existing solutions.

Here’s how:

1. Click on the **Solutions** tab and click on the **folder** that contains the solution you wish to Tag.
2. Click on the solution and click the **Edit** button.
3. Add the necessary tags and click **Update**.

You can also edit the visibility of (i.e. decide who gets to view) folders. There are four visibility options available for folders: Visible to all, visible to logged in users, visible to agents and visible to departments. Here’s how you edit the visibility of a folder.

1. Click on the **Solutions** tab and click on the **folder** whose visibility you wish to alter.
2. Click on the **Edit** button and select the desired visibility option from the **drop down box**.
3. Click **Update** to save your changes.
Organizing Articles

You can reorder and reorganise your articles, folders and categories at anytime.

To reorder categories in your knowledge base,

1. Click on the **Solutions** tab and click on the **Reorder** button to drag and reorder the categories.
2. To reorder the folders under a particular category, click on the particular category and click the **Reorder** button on the left hand side to drag and reorder the folders.
3. To reorder the solutions under a particular folder, click on the particular folder and click the **Reorder** button on the right hand side to drag and reorder the solutions.

Once you have grouped individual articles under a particular folder, you can always undo that and move them to another folder.

1. Click on the **Solutions** tab and click on the **folder** that contains the solution you wish to reorganise. You can also locate solutions by typing out relevant words into the search **all solutions** search bar.
2. Click on the solution you wish to reorganise and click the **Edit** button.
3. From the folder drop down box, pick the folder you wish to move this solution to.
4. Click on the **Update** button to save your changes.

Search

The Search field of Freshservice is a one-stop-shop for almost anything you want to find on Freshservice- right from KB solutions to Tickets, Admins to Agents, CIs to Problems, Changes, Releases and even the notes added on them.

How Search Works in Freshservice

The universal search bar in Freshservice allows you to search across modules and get instant results. Whenever you type a keyword on the search bar, you will get results from the following modules:

- Tickets
- Problems
- Changes
- Release
- Inventory
- Contracts
You can either view all the search results as a single list or click on the respective labels (such as tickets, problems, agents, etc.) to filter the search results specific to those modules.

Agents can only search through the information to which they have been granted access. Let’s take an example where the agent has access for the ticket module. In that case, his search result will only include entries from the ticket module.

Now that we’ve got an overview about the search bar, let’s go in a little further and see how efficient it is.

**Note:** We’ve started rolling out the search improvements in phases. You’ll receive these search features during the upcoming weeks.

**Search with a full or part keyword**

Sometimes you may remember a part of what you wanted to search, but you would be nowhere because you forgot the complete term or keyword that you want to search. In Freshservice, you can perform the search even if you know a part of the keyword.

Let’s take an example where you want to look for an asset with the serial number MDKR5672 and all you remember in mind was 5672. In that case, you can search using the term “5672” and you will be able to see the asset and its relevant details.

**Refine search results using filters**

You can use filters to narrow down your search queries. Let’s take an example where you want to look for tickets that are created between a particular date range, say within the last 15 days. You can use the filters to display tickets created during the last 15 days.

Similarly you can use filter search results based on status, requester, groups, etc.
Quick search

Get to where you want to go, faster. Quick search enables you to search within a particular module from the global search bar and see suggestions only from that module. This also includes modules like agents and departments.

Search relevance

When you enter multiple keywords, Freshservice will list a bunch of results based on the following conditions:

1. The object (eg. ticket, assets etc) containing both the words in the same sentence.
2. The object (e.g. ticket, assets etc) containing both the words in the object but in different sentences
3. The object (e.g. ticket, assets etc) containing either one of the words

Let’s take an example where you search for the term “cookie jar” in the search bar. A ticket containing ‘The Panda broke the cookie jar’ will be at the top of the search results, followed by ‘The panda ate the cookie. Then it broke the jar’.

**Search Tokenization (Partial Search)**

If there is an asset called ACME6789-12FD, it is tokenized as:

1. ACME
2. 6789
3. 12
4. FD
5. 12FD

If you search with any of the above tokens, it will return that asset. You can also search for a keyword starting with any of these tokens (e.g. 678, ACM). Though, it will not return this asset if you were to search for ME or ME67 or 2FD etc.

**Partially searchable attributes in each module,**

**Tickets, problem, release, change:**
-- subject
-- ID

**Assets:**
-- display name
-- asset tag
-- serial number
-- host name

**Contracts:**
-- contract number
-- contract name

**Project:**
-- title

**Solutions:**
-- title
-- tags

**Requesters/agents:**
-- email
-- name

**Departments:**
-- department name