



WebFront for Service Manager Operations Guide

Gridpro AB

Rev: 2.10.7509 (SCSM 2012 versions) & 3.0.7509 (SCSM 2016 & later)

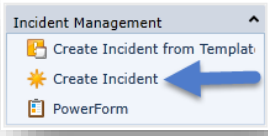
Published: August 2020

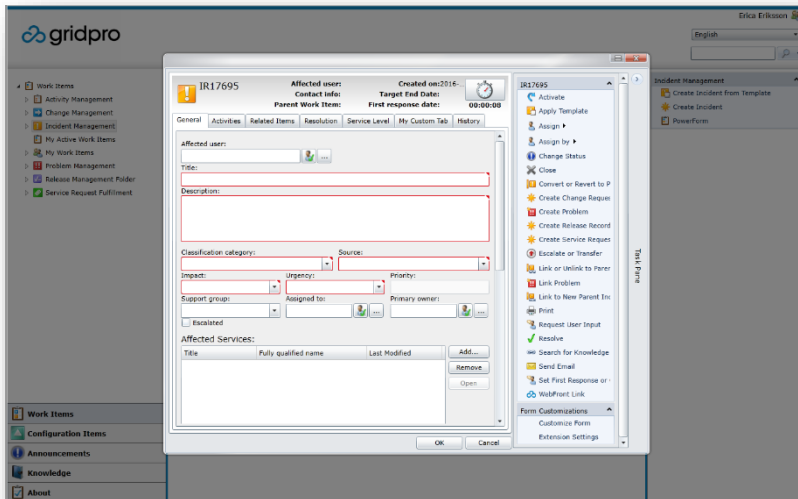
Contents

Incident Management.....	3
Create Incident	3
Edit Incident.....	4
Resolve Incident.....	4
Assign Incident.....	5
Add Comment to Incident	5
Change Management	6
Create Change Request	6
Put Change Request on hold	7
Resume Change Request	8
Cancel Change Request.....	9
Close Change Request.....	10
Service Request Fulfillment.....	11
Create Service Request	11
Create Service Request from Template	12
Put Service Request on hold	13
Resume Service Request.....	14
Cancel Service Request.....	15
Activity Management.....	16
Approve Review Activities	16
Reject Review Activities.....	17
Mark Manual Activities as Completed.....	18
Mark Manual Activities as Failed	19
Other	20
Auto Refresh View	20

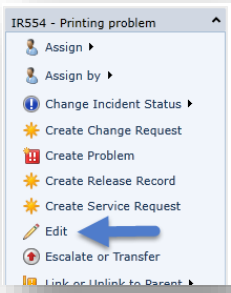
Incident Management

Create Incident

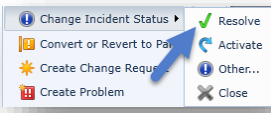
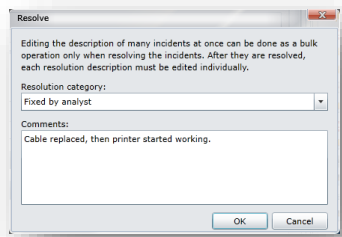
<input type="checkbox"/>	Click Work Items tab
<input type="checkbox"/>	Click Incident Management
<input type="checkbox"/>	 <p>In the right-side task menu click Create Incident</p>
<input type="checkbox"/>	Fill out the form and click OK to save Incident



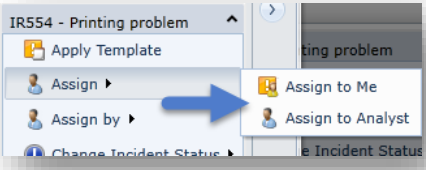
Edit Incident

<input type="checkbox"/>	Click Work Items tab
<input type="checkbox"/>	Click Incident Management
<input type="checkbox"/>	In the middle-pane select the Incident that you want to edit
<input type="checkbox"/>	<div style="display: flex; align-items: center;">  <div style="margin-left: 20px;"> <p>In the right-side task menu click Edit</p> <p><u>Or</u></p> <p>Double-click Incident</p> </div> </div>
<input type="checkbox"/>	Edit data in form and click OK to save changes

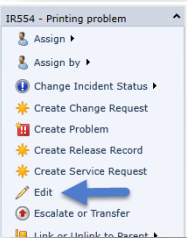
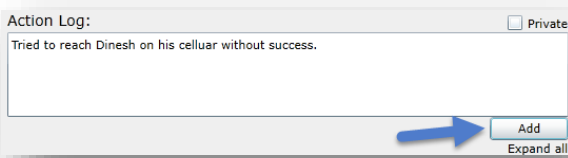
Resolve Incident

<input type="checkbox"/>	Click Work Items tab
<input type="checkbox"/>	Click Incident Management
<input type="checkbox"/>	In the middle-pane select the Incident that you want to resolve
<input type="checkbox"/>	<div style="display: flex; align-items: center;">  <div style="margin-left: 20px;"> <p>In the right-side task menu click Change Incident Status – Resolve</p> </div> </div>
<input type="checkbox"/>	<div style="display: flex; align-items: center;">  <div style="margin-left: 20px;"> <p>Select a Resolution Category and type in a Comment, then click OK</p> <p>Click OK to close form and save changes</p> </div> </div>

Assign Incident

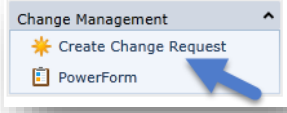
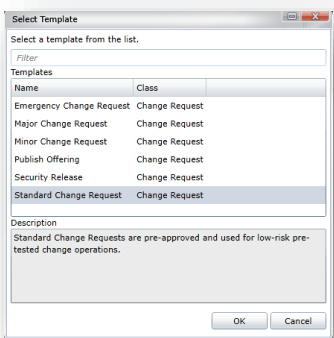
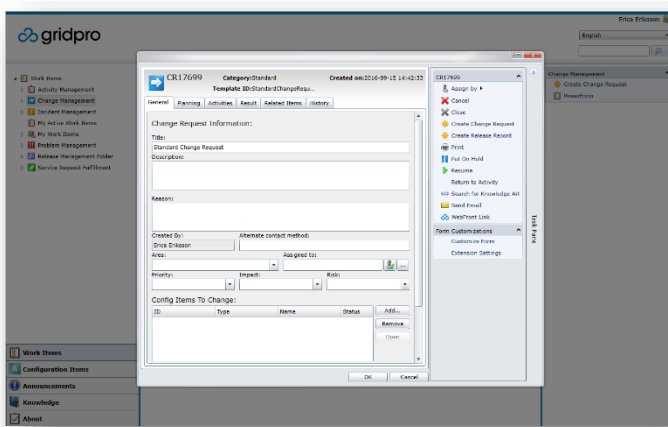
<input type="checkbox"/>	Click Work Items tab
<input type="checkbox"/>	Click Incident Management
<input type="checkbox"/>	In the middle-pane select the Incident that you want to assign
<input type="checkbox"/>	 <p>In the right-side task menu click Assign – Assign to Me or Assign – Assign to Analyst</p>
<input type="checkbox"/>	If you selected Assign to Me , click OK to close form and save changes
<input type="checkbox"/>	If you selected Assign to Analyst , use search function to find an analyst Select analyst and click OK , click OK again to close form and save changes

Add Comment to Incident


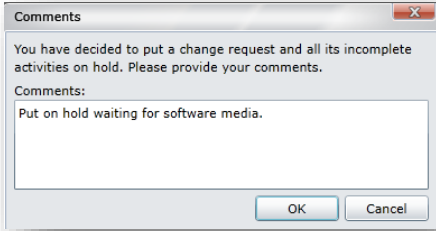
<input type="checkbox"/>	Click Work Items tab
<input type="checkbox"/>	Click Incident Management
<input type="checkbox"/>	In the middle-pane select the Incident that you want to edit
<input type="checkbox"/>	 <p>In the right-side task menu click Edit</p> <p><u>Or</u></p> <p>Double-click Incident</p>
<input type="checkbox"/>	 <p>Type in an Action Log message and click Add</p> <p>Click OK to close form and save comment</p>

Change Management

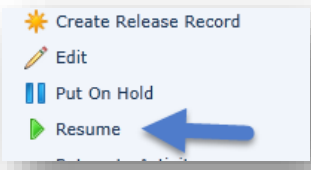
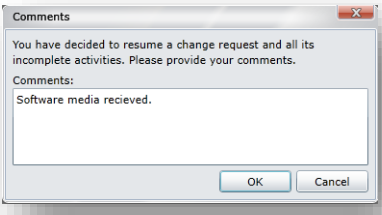
Create Change Request

<input type="checkbox"/>	Click Work Items tab
<input type="checkbox"/>	Click Change Management
<input type="checkbox"/>	 <p>In the right-side task menu click Create Change Request</p>
<input type="checkbox"/>	 <p>Select a Template and click OK</p>
<input type="checkbox"/>	 <p>Fill out the form and click OK to save Change Request</p>

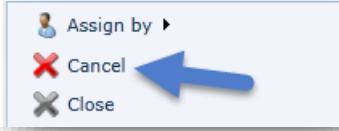
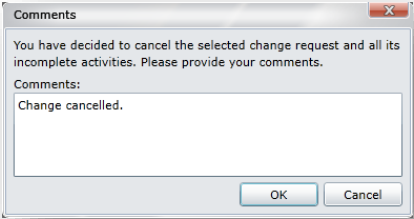
Put Change Request on hold

<input type="checkbox"/>	Click Work Items tab
<input type="checkbox"/>	Click Change Management
<input type="checkbox"/>	In the middle-pane select the Change Request that you want to put on hold
<input type="checkbox"/>	<div data-bbox="341 622 603 757"></div> <p>In the right-side task menu click Put On Hold or double-click Change Request and click Put On Hold in form task menu</p>
<input type="checkbox"/>	<div data-bbox="341 855 778 1084"></div> <p>Type in a Comment and click OK</p>
<input type="checkbox"/>	Click OK to close form and save

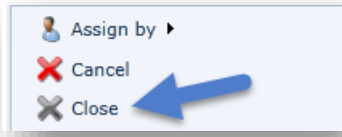
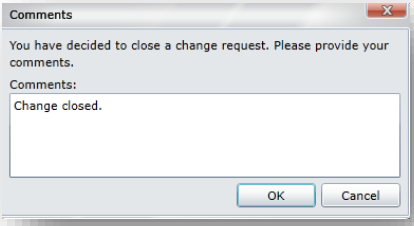
Resume Change Request

<input type="checkbox"/>	Click Work Items tab
<input type="checkbox"/>	Click Change Management
<input type="checkbox"/>	In the middle-pane select the Change Request that you want to resume
<input type="checkbox"/>	 In the right-side task menu click Resume or double-click Change Request and click Resume in form task menu
<input type="checkbox"/>	 Type in a Comment and click OK
<input type="checkbox"/>	Click OK to close form and save

Cancel Change Request

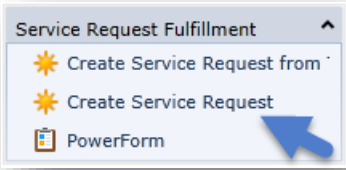
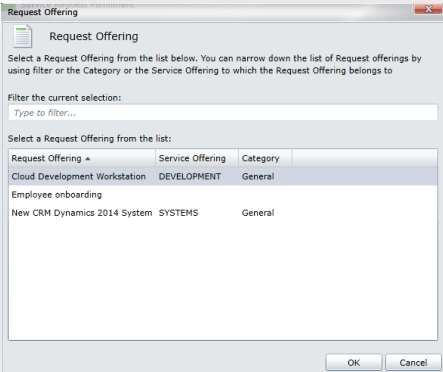
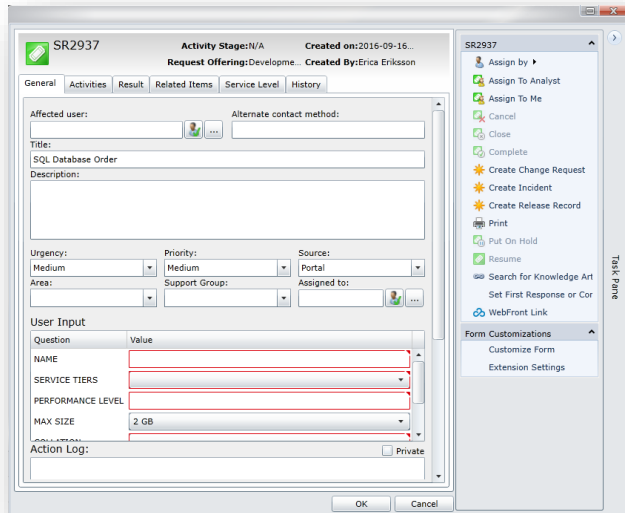
<input type="checkbox"/>	Click Work Items tab
<input type="checkbox"/>	Click Change Management
<input type="checkbox"/>	In the middle-pane select the Change Request that you want to cancel
<input type="checkbox"/>	 In the right-side task menu click Cancel or double-click Change Request and click Cancel in form task menu
<input type="checkbox"/>	 Type in a Comment and click OK
<input type="checkbox"/>	Click OK to close form and save

Close Change Request

<input type="checkbox"/>	Click Work Items tab
<input type="checkbox"/>	Click Change Management
<input type="checkbox"/>	In the middle-pane select the Change Request that you want to close
<input type="checkbox"/>	 In the right-side task menu click Close or double-click Change Request and click Close in form task menu
<input type="checkbox"/>	 Type in a Comment and click OK
<input type="checkbox"/>	Click OK to close form and save

Service Request Fulfillment

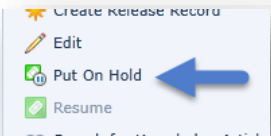
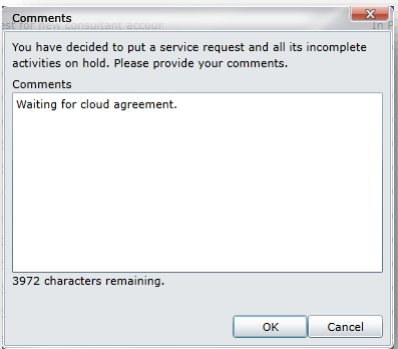
Create Service Request

<input type="checkbox"/>	Click Work Items tab
<input type="checkbox"/>	Click Service Request Fulfillment
<input type="checkbox"/>	 <p>In the right-side task menu click Create Service Request</p>
<input type="checkbox"/>	 <p>Select a Request Offering and click OK</p>
<input type="checkbox"/>	 <p>Complete the form and click OK to submit Service Request</p>

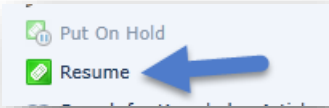
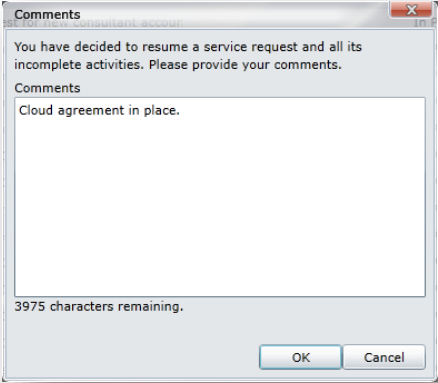
Create Service Request from Template

<input type="checkbox"/>	<p>Click Work Items tab</p>
<input type="checkbox"/>	<p>Click Service Request Fulfillment</p>
<input type="checkbox"/>	<div data-bbox="343 526 694 694"> </div> <p data-bbox="782 548 1268 638">In the right-side task menu click Create Service Request from Template</p>
<input type="checkbox"/>	<div data-bbox="343 795 710 1153"> </div> <p data-bbox="805 817 1197 862">Select a Template and click OK</p>
<input type="checkbox"/>	<div data-bbox="351 1265 1005 1803"> </div> <p data-bbox="1101 1288 1340 1433">Complete the form and click OK to submit Service Request</p>


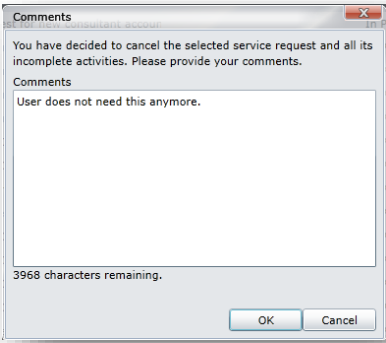
Put Service Request on hold

<input type="checkbox"/>	Click Work Items tab
<input type="checkbox"/>	Click Service Request Fulfillment
<input type="checkbox"/>	In the middle-pane select the Service Request that you want to put on hold
<input type="checkbox"/>	 In the right-side task menu click Put On Hold or double-click Service Request and click Put On Hold in form task menu
<input type="checkbox"/>	 Type in a Comment and click OK
<input type="checkbox"/>	Click OK to close form and save

Resume Service Request

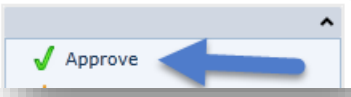
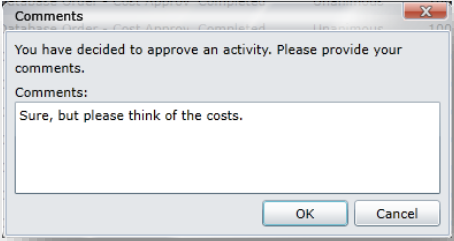
<input type="checkbox"/>	Click Work Items tab
<input type="checkbox"/>	Click Service Request Fulfillment
<input type="checkbox"/>	In the middle-pane select the Service Request that you want to resume
<input type="checkbox"/>	 In the right-side task menu click Resume or double-click Service Request and click Resume in form task menu
<input type="checkbox"/>	 Type in a Comment and click OK
<input type="checkbox"/>	Click OK to close form and save

Cancel Service Request


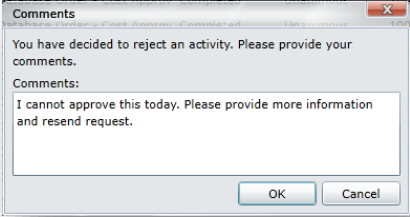
<input type="checkbox"/>	Click Work Items tab
<input type="checkbox"/>	Click Service Request Fulfillment
<input type="checkbox"/>	In the middle-pane select the Service Request that you want to cancel
<input type="checkbox"/>	 In the right-side task menu click Cancel or double-click Service Request and click Cancel in form task menu
<input type="checkbox"/>	 Type in a Comment and click OK
<input type="checkbox"/>	Click OK to close form and save

Activity Management

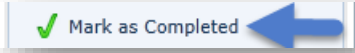
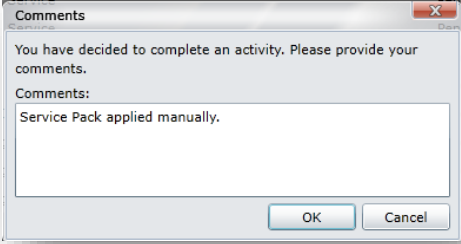
Approve Review Activities

<input type="checkbox"/>	Click Work Items tab
<input type="checkbox"/>	Click Activity Management
<input type="checkbox"/>	In the middle-pane select the Review Activity that you want to approve
<input type="checkbox"/>	 In the right-side task menu click Approve or double-click Review Activity and click Approve in form task menu
<input type="checkbox"/>	 Type in a Comment and click OK
<input type="checkbox"/>	Click OK to close form and save

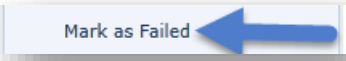
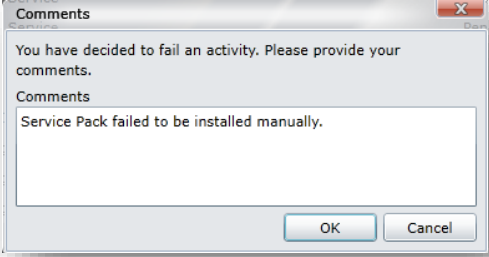
Reject Review Activities

<input type="checkbox"/>	Click Work Items tab
<input type="checkbox"/>	Click Activity Management
<input type="checkbox"/>	In the middle-pane select the Review Activity that you want to reject
<input type="checkbox"/>	 In the right-side task menu click Reject or double-click Review Activity and click Reject in form task menu
<input type="checkbox"/>	 Type in a Comment and click OK
<input type="checkbox"/>	Click OK to close form and save

Mark Manual Activities as Completed

<input type="checkbox"/>	Click Work Items tab
<input type="checkbox"/>	Click Activity Management
<input type="checkbox"/>	In the middle-pane select the Manual Activity that you want to approve
<input type="checkbox"/>	 In the right-side task menu click Mark as Completed or double-click Review Activity and click Mark as Completed in form task menu
<input type="checkbox"/>	 Type in a Comment and click OK
<input type="checkbox"/>	Click OK to close form and save

Mark Manual Activities as Failed

<input type="checkbox"/>	Click Work Items tab
<input type="checkbox"/>	Click Activity Management
<input type="checkbox"/>	In the middle-pane select the Manual Activity that you want to mark as failed
<input type="checkbox"/>	 In the right-side task menu click Mark as Failed or double-click Review Activity and click Mark as Failed in form task menu
<input type="checkbox"/>	 Type in a Comment and click OK
<input type="checkbox"/>	Click OK to close form and save

Other

Auto Refresh View

You can instruct WebFront to auto refresh views every minute, this can be very useful when you need to monitor a certain view for incoming work items.

<input type="checkbox"/>	Open any work item- or configuration item view in WebFront
<input type="checkbox"/>	Right click the view and select Start auto refresh NOTE: The next time you change view WebFront will automatically stop the auto refresh cycle. If you want to stop it without having to change view, just right click the view and select Stop auto refresh .