

System Overview

Introduction

BMC's **Service Desk Express** (SDE) is an efficient and easy-to-use incident tracking system. This section describes the common system information and navigation you should know to use SDE.

- [Logging In](#)
- [The SDE Dashboard](#)
- [Customizing the Dashboard](#)
- [Query Screen Controls](#)

Logging In

To log into SDE:

1. Open your Internet Explorer browser. (*SDE is only compatible with the Internet Explorer browser.*)
2. In the URL field, enter the internal URL to access SDE: **http://sdeprdap/sde/**

SDE logs you in and displays your dashboard, which is the primary workspace. Your username and password for SDE are your current company network credentials.

The SDE Dashboard

The SDE dashboard is the main interface you use to manage your work. The dashboard displays previously-defined queries and their results, known as **QuickViews**. By default, the dashboard for technical support group members displays two QuickViews when opened, **Open Incidents Assigned to Me**, and **Open Incidents Assigned to my Current Group**. This default view is known as the **Support Incidents Dashboard**. The example below may not match exactly what you see, depending on your incidents.

SDE Default Support Incidents Dashboard

The screenshot shows the SDE Dashboard interface. On the left is a sidebar with a 'Workspaces' menu and a 'QuickViews' section. The 'QuickViews' section lists several predefined queries under 'Incidents', including 'Ad Insertion Pending Unassign', 'All Adrenalin Incidents', 'All Advertising Escalated Incidents', 'All Broadcast Escalated Incidents', 'All GSN/HSN Escalated Incidents', 'All Incident search by Incident', 'All Incidents', 'All Incidents Product (GSN/HSN)', 'All Incidents Product (VOD)', 'All RMS Incidents', and 'All System Outages'. The main area displays a table of incidents for the 'ACTON VOD SUPPORT' group. The table has columns for Incident, Company Name, Location, Status, and Incident Description. The first two rows are visible: one for incident 125269 (CABLEVISION, CABLEVISION-HICKSVILLE, OPEN, h12sub1 blue screen, sha d) and another for incident 125265 (MEDIACOM, MEDIACOM-MOLINE, AWAITING CUSTOMER ACTION, Found Failed sending Id: 6). The table is paginated, showing 'Page 1 of 130 (259 records)'. The top right of the dashboard shows 'Alex Dashboard' and a 'Refresh every 30 minutes' option.

Incident	Company Name	Location	Status	Incident Description
125269	CABLEVISION	CABLEVISION-HICKSVILLE	OPEN	h12sub1 blue screen, sha d
125265	MEDIACOM	MEDIACOM-MOLINE	AWAITING CUSTOMER ACTION	Found Failed sending Id: 6

Customizing the Dashboard

The dashboard may be customized to display your most commonly used queries, in addition to or in place of the default view.

You may:

- Use the **Dashboard Manager** to name and save a customized Dashboard view; and/or
- Use the **Add QuickView to Dashboard** function to add queries to your view, for a total of three.

The Dashboard Manager

The **Dashboard Manager** allows you to create your own Dashboard and then add QuickViews (queries) of your choice to it.

Use the following steps to create your own Dashboard:

1. Click the **Dashboard Manager icon** to open the Dashboard Manager.

Dashboard Manager Icon

Open the Dashboard Manager by clicking the Dashboard Manager icon

MY OPEN RMAs (SWONG)

Select Query: My Open RMAs (SWONG)
Enter Staff ID: AHART
Optional Filter: RMA #
Search

Table | Calendar | Chart

« First < Previous Page 0 of 0 (0 records) Next > Last »

RMA #	Ship Method	Company Name	Site Name
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My Group's Open RMAs (SWO)

Select Query: My Group's Open RMAs (SWO)
Enter Group: SRN LOGISTICS
Optional Filter: RMA #
Search

Table | Calendar | Chart

« First < Previous Page 1 of 6 (56 records) Next > Last »

RMA #	Ship Method	Company Name	Site Name
3363	2 Day	COX MEDIA	LAS VEGAS
3785	2 Day	COMCAST	JACKSON
4661	Next Day	HOSPITALITY NETWORKS	
4662	Next Day	HOSPITALITY NETWORKS	
4734	Next Day	HOSPITALITY NETWORKS	
4791	Next Day	COMCAST	
5018	2 Day	ROGERS CABLE TV	TORONTO
5107	Next Day	HOSPITALITY NETWORKS	
5108	Next Day	HOSPITALITY NETWORKS	
5109	Next Day	HOSPITALITY NETWORKS	
5191	2 Day	COMCAST	TALLAHASSEE

2. In the Dashboard Manager Name field, type in an alphanumeric name for your new dashboard. This name can also include common punctuation, such as apostrophes, e.g. jsmith1's Dashboard, CJONES, etc.
3. Click the **Save** button to save this customized dashboard.

Dashboard Manager Screen

Enter the Dashboard name in the Dashboard Name field

Dashboard Name: AHART's Dashboard

Save

Dashboards
Escalation Dashboard (SWONG)
Logistics RMAs Dashboard (SWONG)
Support Incidents Dashboard (SWONG)

Switch To
Copy To New
Rename
Delete

The Save command will save this individual Dashboard

Close
Help

Detailed description: This screenshot shows the 'Dashboard Manager' interface. At the top, a text box prompts the user to 'Enter the Dashboard name in the Dashboard Name field'. Below this, the 'Dashboard Name' field contains the text 'AHART's Dashboard'. To the right of the field is a 'Save' button. Below the name field is a table titled 'Dashboards' with three rows: 'Escalation Dashboard (SWONG)', 'Logistics RMAs Dashboard (SWONG)', and 'Support Incidents Dashboard (SWONG)'. To the right of the table are buttons for 'Switch To', 'Copy To New', 'Rename', and 'Delete'. At the bottom of the table area, a callout box states 'The Save command will save this individual Dashboard'. At the very bottom of the screen are 'Close' and 'Help' buttons. Red annotations include a box around the 'Save' button, a box around the 'AHART's Dashboard' text, and a red arrow pointing from the 'Switch To' button to the 'Save' button.

4. **Highlight** the newly created dashboard in the List.
5. Click the **Switch To** button in order to switch to your new dashboard.

Switch to the New Dashboard

Dashboard Name:

Save

Dashboards
AHART's Dashboard (AHART)
Escalation Dashboard (SWONG)
Logistics RMAs Dashboard (SWONG)
Support Incidents Dashboard (SWONG)

Switch To
Copy To New
Rename
Delete

Close
Help

Highlight the newly named Dashboard in the list and click the Switch To button

Detailed description: This screenshot shows the 'Dashboard Manager' interface after a new dashboard has been created. The 'Dashboard Name' field is empty. The 'Dashboards' table now includes 'AHART's Dashboard (AHART)' as the first entry. The 'Switch To' button is highlighted with a red box. A red arrow points from the 'Switch To' button to the 'AHART's Dashboard (AHART)' row in the table. At the bottom, a callout box states 'Highlight the newly named Dashboard in the list and click the Switch To button'. The 'Close' and 'Help' buttons are at the bottom right.

Let Me Try: Customizing the Dashboard


Try out the dashboard customization technique in an interactive simulation.

[Let Me Try](#) 
[link inactivated]

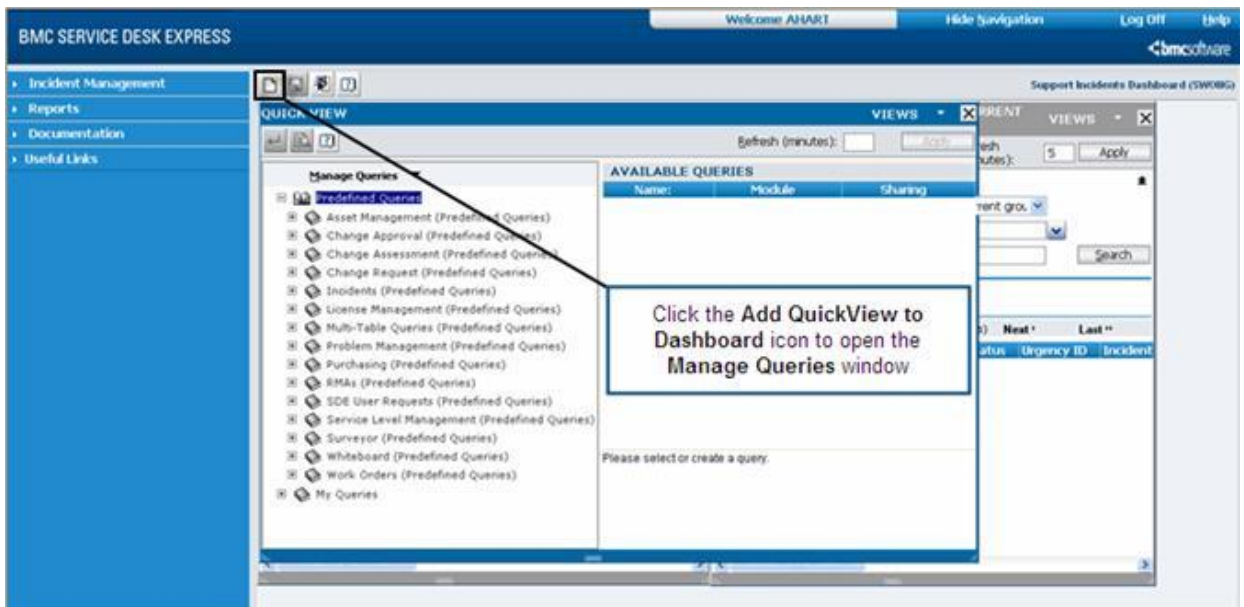
Add QuickView to Dashboard

You can customize which queries are presented in your dashboard by adding QuickViews (for a total of three), or by only displaying one QuickView and changing the query as needed.

Use the following steps to add another QuickView to the Dashboard:

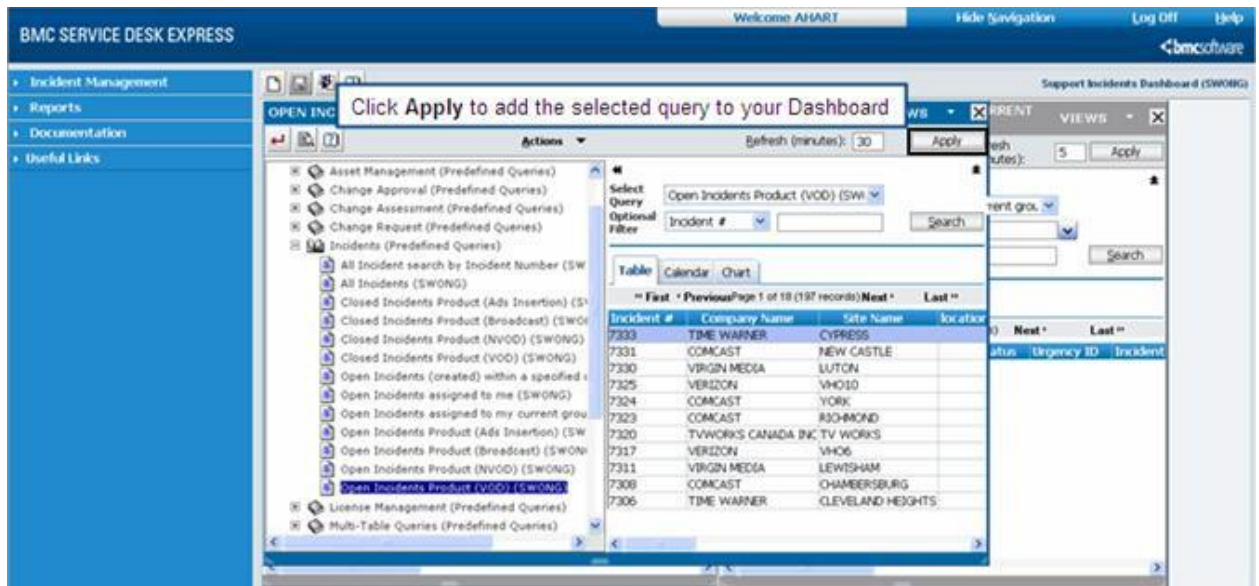
1. Click the **Add QuickView to Dashboard** icon . The **Manage Queries** window opens.

Add QuickView to Dashboard Icon



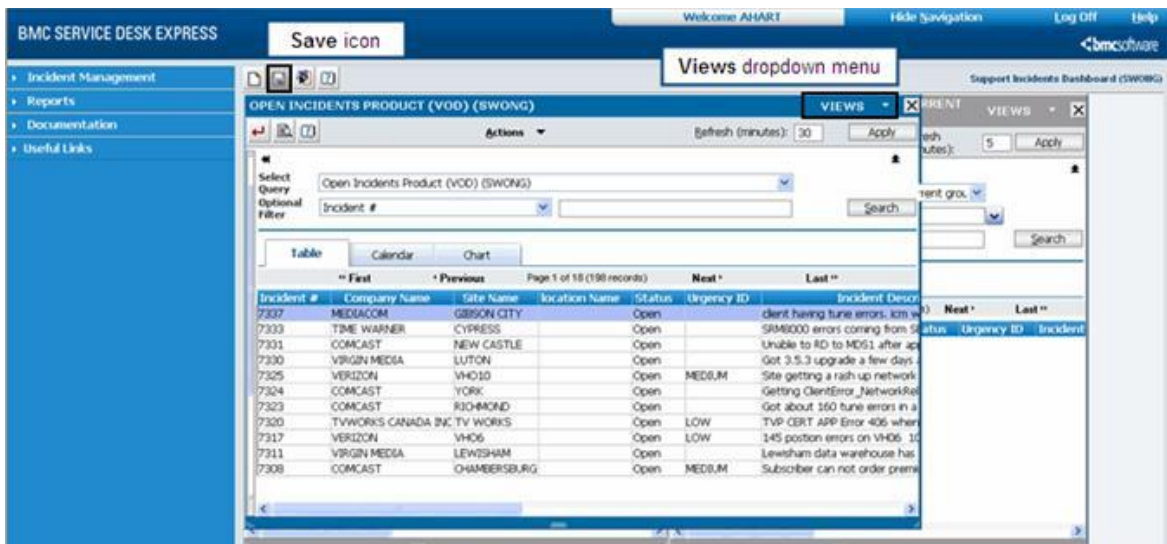
2. Expand each heading in the left pane list to access an individual query, and select it by highlighting.
As you select the query, it will run and appear in the right pane.
3. Click **Apply** to add the selected query to your dashboard.

Add Selected Query to Dashboard



4. Use the **Views** dropdown menu to specify how many queries to display at once.
5. Modify the size and location of each query on your dashboard by dragging the query windows.
6. Click **Save** to save the customized dashboard.

Save and Views Commands



Query Screen Controls

The screenshot below identifies the Query Screen icons and controls.

Query Screen Icons and Controls

BMC SERVICE DESK EXPRESS Welcome AHART Hide Navigation Log Off

Incident Management Reports Documentation Useful Links

Run the selected query

Preview and/or print query

Refresh the records shown

Select a query

Refresh (minutes): 5

Select Query: Closed Incidents Product (VOD) (SWONG)

Optional Filter: Incident #

Table Calendar

Add Optional Filters, Box 1 for filter, and Box 2 for parameter

Incident #	Company Name	Site Name	Location Name	Status	Urgency ID	Incident Description	Due Date
7341	ROGERS CABLE TV			Closed		rma for defective drives	
7337	MEDIACOM	GIBSON CITY		Closed		client having tune errors. icm was stopped. Als...	
7334	COMCAST	PRINCE GEORGE		Closed		wanted to know how to tell seadac version.	
7329	COMCAST	PITTSBURGH		Closed		RMA	
7327	COMCAST	DENVER		Closed		Dead -48V PS.	
7323	COMCAST	RICHMOND		Closed		Got about 160 tune errors in a one minute burst...	
7319	COMCAST	TUCSON		Closed		Remote saves are failing on MDS1 causing memory...	
7318	COMCAST	LANCASTER		Closed	MEDIUM	Jencho asset going into Error ETF. In the deta...	3/12/2008 8:08:1
7316	COMCAST	SEATTLE		Closed	LOW	Dave is turning off pipes on ICOMSEATOMA13, how...	3/13/2008 11:56:
7309	COMCAST	FOXBORO		Closed	LOW	Customer has a box (CMA5) That has a broken vid...	3/13/2008 11:13:
7307	COMCAST	MONMOUTH/EATONTOWN		Closed	MEDIUM	No bandwidth on import jobs. Cluster# 35930. Ip...	3/12/2008 7:02:4
7302	CABLEVISION	HICKSVILLE		Closed		RMA for 8 DRV-5072-00, 1 DRV-5071-00 and 1 DRV...	
7300	MASSILLON CABLE TV INC	MASSILLON CABLE TV INC		Closed	LOW	2 much for tv package on indemand system is not...	3/13/2008 10:43:
7299	COMCAST	FOXBORO		Closed		Assets stuck in delete and loading	
7292	COMCAST	RICHMOND		Closed	LOW	Customer needs RMA on two drives (same model) D...	3/13/2008 9:52:4

Alternate Query Screen Views

The default query screen view is the *Table View*, which is the most convenient for selecting an individual incident. However, a *Calendar* and *Graph View* are also available from the view tabs.

Query Screen Default Table View

BMC SERVICE DESK EXPRESS Welcome AHART Hide Navigation Log Off Help

Incident Management Reports Documentation Useful Links

Alex Dashboard (AHART)

OPEN INCIDENTS ASSIGNED TO MY CURRENT GROUP (SWONG)

Select Query: Open Incidents assigned to my current group (SWONG)

Enter Group: ACTION VOD SUPPORT

Optional Filter: Incident

Refresh (minutes): 30

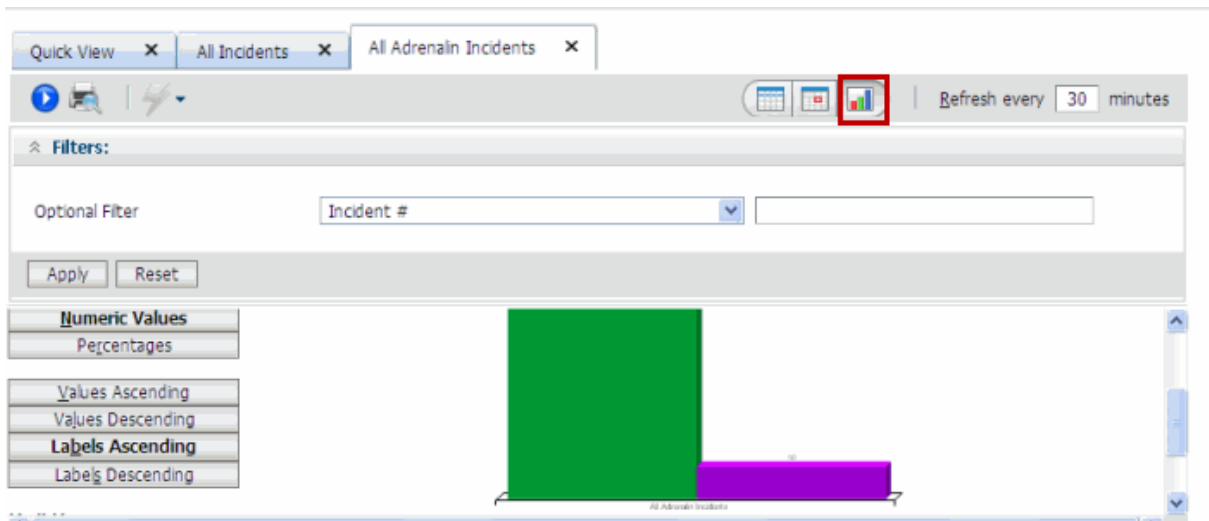
Views: Table Calendar Chart

Default Table View

Incident	Company Name	Site Name	Status	Urgency ID	Incident Description	Due Date
16976	COMCAST		Open	MEDIUM	Comcast Denver and Colorado Springs—RTE CB54 ...	
16973	SUDENLINK COMMUNICATIONS	SUDENLINK COMMUNICATIONS	Open		Site is using auto discovery Gregg is runn...	
16971	SUDENLINK COMMUNICATIONS	SUDENLINK COMMUNICATIONS	Open		Client Version 5.31 for DCH100, DCH200, and DCT...	
16970	VIRGIN MEDIA		Open		rma (3) three drv seapack version 305 service...	
16968	ENTOUCH SYSTEMS	CYPRESS	Open		denied access to vod error prm 9005 across ...	
16967	COX COMMUNICATIONS	ATLANTA LABS	Open		pin entry pop does not display when selecting b...	
16966	ROGERS CABLE TV	ROGERS CABLE TV	Open	MEDIUM	rma request part # KPD401e-40 power supply ...	7/14/2008

The *Query Screen Chart View* creates graphs or charts using the incident data in that query, and is selected from the **Chart** tab.

Query Screen Chart View



Fields may be selected from a dropdown menu for the primary chart criteria, and different charts may be selected.

Query Screen Chart View Criteria Selection and Options

