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
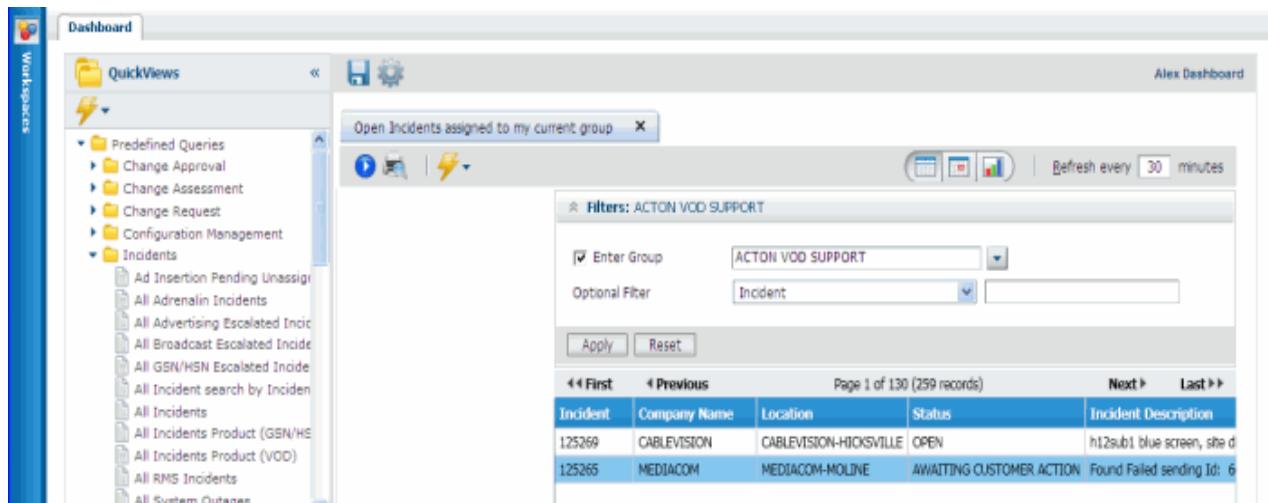
Customizing the Dashboard

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
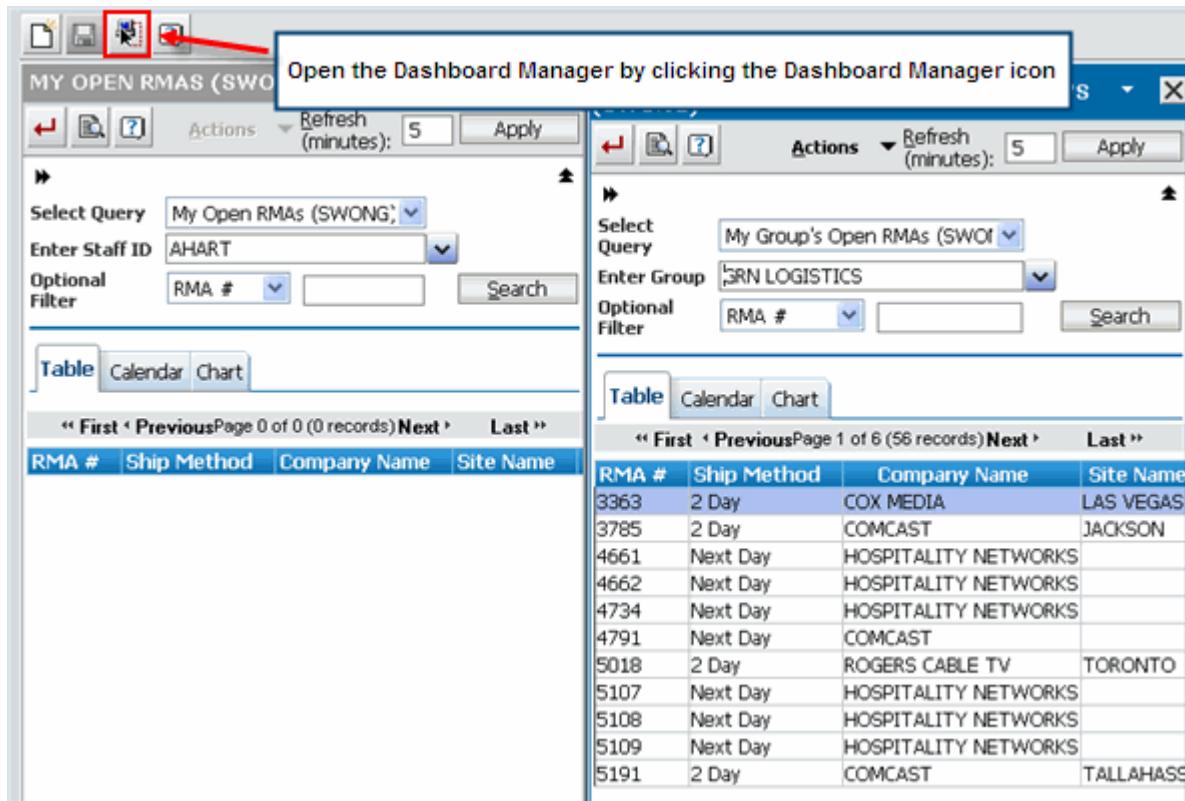
2. In the Dashboard Manager Name field, type in an alphanumeric name for your new dashboard. This name can also include common punctuation, such as apostrophes, e.g. jsmith1's Dashboard, CJONES, etc.

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
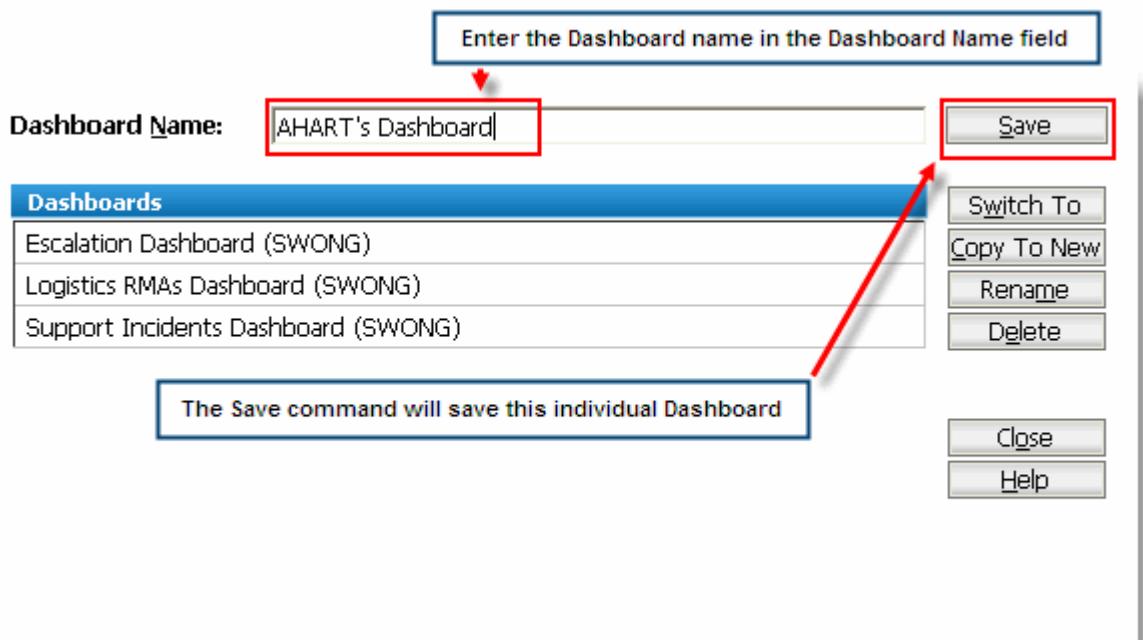
4. **Highlight** the newly created dashboard in the List.

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

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

Close
Help
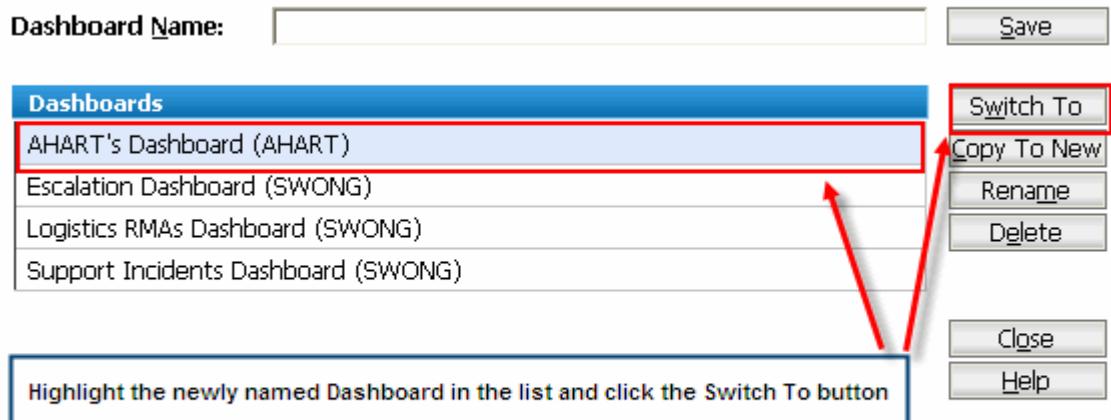
Let Me Try: Customizing the Dashboard

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
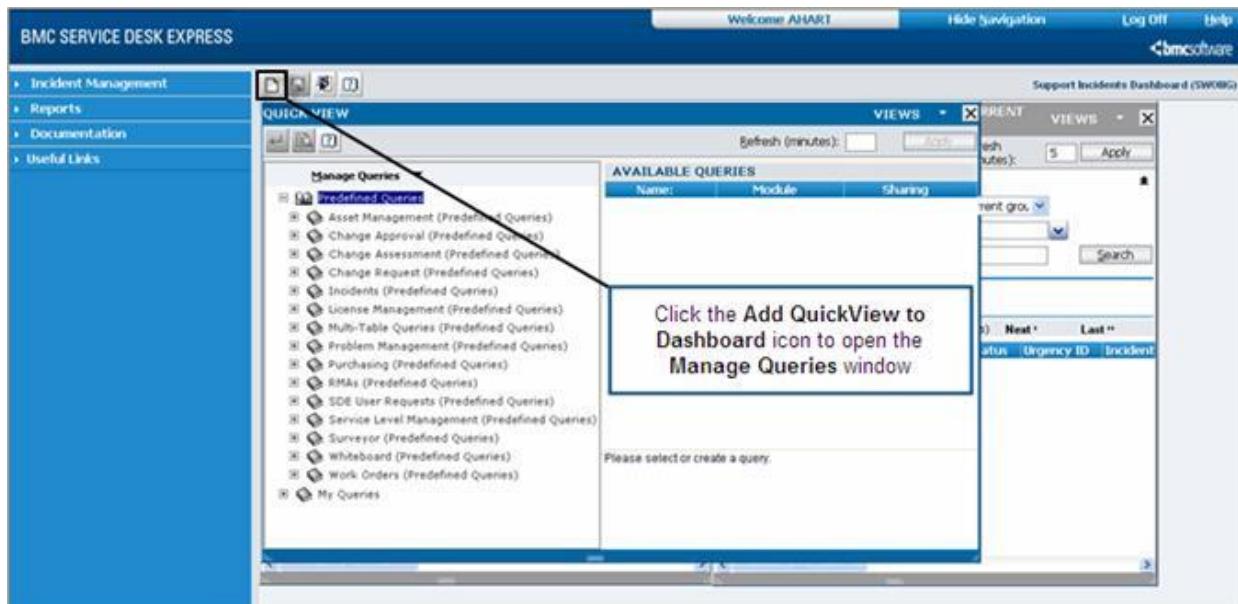
2. Expand each heading in the left pane list to access an individual query, and select it by highlighting.

   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

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

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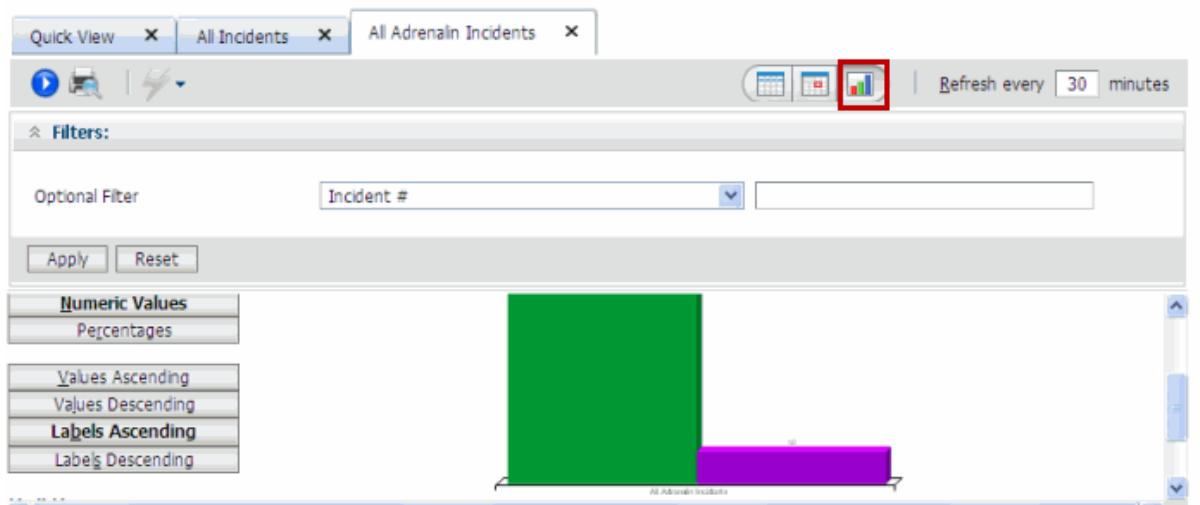
Fields may be selected from a dropdown menu for the primary chart criteria, and different charts may be selected.

Query Screen Chart View Criteria Selection and Options