

Infra Course Outline

Service Desk operator



Infra Service Desk is a service management tool for managing and controlling customer calls received through a service desk. This one day course is suitable for anyone who needs to learn how to log, manage and control customer calls using Infra Service Desk.

What You Will Learn

- How to configure the Infra interface
- How to log a call
- How to attach files to calls
- How to email customers in calls from within Infra
- How to action and defer a call
- How to link and clone calls
- How to manage outstanding calls
- How to search for calls in Infra
- How to create reports on calls logged
- How to use the bulletin board to send updates or emails



How You Will Benefit

On completion of this course, students will be able to log, manage and control calls using Infra Service Desk.. A full course manual is provided with the course which students can take back to the workplace and use as a future reference source.

Length of Course: 1 day

Maximum Students: 12 students

Infra Course Outline

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Course Topics

Module 1: Introducing Infra

- Introduction to Infra
- Launching Infra and logging in
- Introduction to the interface
- Customizing the toolbar
- Shortcuts
- Managing multiple windows
- Exiting Infra

Module 2: Call Logging

- Log a call
- Searching and the QD button
- Simple QD button
- Dropdown QD button

Module 3: Call Details Interface

- Call details screen
- Call info panel
- Call explorer menu
 - ❖ Creating Favorites
- The service window
 - ❖ Standard alerts
 - ❖ ITIL alerts
 - ❖ SLM alerts
- Call history

Module 4: Action a Call

- Call action buttons
- Call ownership concepts
 - ❖ Internal
 - ❖ External
 - ❖ Defer
 - ❖ Close
- Reopen a closed call

Module 5: IPK Workflow Rules

- Introduction
- Workflow activities
- Workflow rules alerts

Module 6: Call Linking and Cloning

- Linking calls
- Cloning calls

Module 7: Data Options

- Attaching objects to calls
- Attributes
- Forms
- Extensions

Module 8: Other Call Features

- Service Level Management (SLM)
 - ❖ SLA alerts
 - ❖ Escalation and breach notifications
- Viewing CI links
- Quick solutions
- Email
- Letters
- Scripts

Module 9: Managing Calls

- Calls outstanding view
- Using view filters
- Watching calls
- Bulk forwarding calls
- Personalising views
- Column widths
- Column sort
- Filter columns
- Action vs. review
- Adding notes
- Exporting results
- Resetting suspended calls

Module 10: Searching

- Searching for calls
- Text searching
- Graphing results
- Saving searches
- Daily statistics

Module 11: Reporting

- Standard reporting
- Selection criteria
- Saving reports
- Scheduling reports

Module 12: Internal Communication

- Viewing the bulletin board
- Creating a bulletin
- Internal messaging
 - ❖ Receiving and deleting internal messages
- Automatic emails
- Accessing mail message access

Licensed Modules

- Object version control
- Monitors and Dashboards
- Outages
- KCS Knowledge Bank
- ITIL IPK Tiers
- Forums
- Scripting