

Freshservice Service Management **Glossary**

An exhaustive list of terms associated with Freshservice, ITIL, and ITSM





Account Admin

An account admin is an agent role that lets the agent have complete access to everything within the service desk, including billing and account management.

Active Contracts

Active contracts are contracts assigned between a customer and a seller that have neither expired nor been terminated.

Activities

Activities provide a quick snapshot of all the activities and updates throughout the lifecycle of the ticket (incident, problem, change & release).

Admin

The admin is an agent role that lets the agent configure all settings in the Admin tab, but is restricted from viewing account or billing related information.

Admin Settings

Admin settings is the one stop to configure all admin related settings within your service desk.

Agent

An agent is someone who can view, assign and respond to tickets.

Agent Availability

Agent availability is a dashboard widget that displays the number of agents available within a group at any given point.

Analytics

Analytics lets users turn raw data in your service desk into insights with customizable reports.

Announcements

Announcements are broadcast alerts about important updates such as an upcoming release or downtime.

Approver

An approver (e.g. the reporting manager) is the individual who approves a request within the service desk.

Apps

Apps extend the functionality of Freshservice by integrating them with third party apps from the Marketplace.

Arcade

Arcade lets users set points & quests to measure the performance across your IT team and awards points to agents, even as they are sending out replies to a ticket.

Ask Freddy

Ask Freddy lets users ask for metrics in plain english so Freddy can fetch them in the form of reports, tables, etc. Freddy will process your questions by applying the right criteria and give you the results in no time.

Asset

Assets are the different types of software and hardware that you find in a business environment.

Asset Auto Assignment

Asset auto assignment lets you assign devices to users and have the asset assignment details up to date.

Asset Impact

Asset impact evaluates the impact of an incident ticket when an asset is associated with it. The result will reflect on the "impact" field value of the ticket.

Asset Life Cycle Management

Asset lifecycle management tracks the status of all the assets in the organization through phases such as procurement, maintenance, depreciation, and disposal.

Asset Management

Asset management is a set of processes that are used to manage the end-to-end lifecycle of assets.

Asset Relationships

Asset relationships help you control and manage the way different assets are tied to each other in your organization.

Asset Tag

Asset tag is a unique serial number or barcode to identify the particular asset.

Audit Log

Audit log keeps track of all the changes that take place under the admin settings of your service desk.

Automatic Ticket Assignment (Round Robin)

Automatic ticket assignment lets the system distribute tickets to all agents in the group, in a round-robin order.

Average First Response Time

Average response time will display the average time taken by a particular agent/group to respond to tickets.

Average Resolution Time

Average resolution time will display the average time taken by a particular agent/group to resolve tickets.



Blackout Window

Blackout window is a timeframe where change managers can define if changes should be scheduled.

Bulk Actions

Bulk action lets you perform a set of actions for a group of tickets instead of doing each action.



CAB (Change Advisory Board)

CAB consists of technical staff and crucial decision-makers who are tasked with assessing changes to the IT set up.

Canned Responses

Canned responses are predefined reply templates to common questions that agents can reuse in a single click.

Card View

Card view displays all the tickets in a list with every ticket's information wrapped in a card-shaped container.

Change

Change is the addition, modification or removal of anything that could have an effect on IT services. The scope must include all IT services, configuration items, processes, documentation etc.

Change Calendar

Change calendar can be used as a calendar to schedule changes, CAB meetings, maintenance and blackout windows.

Change Lifecycle

Change lifecycle is a representation of the service desk's change process and also lets you control all step-by-step transitions within a change lifecyle.

Change Management

Change management process acts as a gatekeeper which ensures minimum risk and impact to the current infrastructure & ongoing operations.

Change Manager

Change manager is an agent role that lets agents create and view problems/ releases and have full access to the change module.

Change Types

Change types determine the different change process that must be followed for a particular type of change. For example Standard change, emergency change, etc.

Child Ticket

Child ticket is also an incident that can be added to a parent ticket for either the same issue or a more superficial issue resulting from it.

Classic Portal

Classic portal allows end users to raise tickets and provide seamless self-service experience with FAQs to common fixes. Users can also request for an item from a shopping cart like catalog where service items can be segregated based on functions.

CMDB

CMDB is the central location that provides a complete and accurate view of the IT assets within the organization.

CNAME

CNAME is a type of resource record in the Domain Name System (DNS) that specifies that one domain name is an alias of another canonical domain name.

Condition

Condition is a node in workflow automator that lets you define parameter(s) that need to be validated during the execution of a workflow.

Configuration Manager

Configuration manager is an agent role that lets agents view problems, changes, releases and have full access to the CMDB module.

Conflict

Conflict is an error caused by the modifications to values, description or properties, in your Freshservice and Sandbox accounts.

Consumable

Consumables are products that consumers use recurrently, which can be replenished such as catridges, computer hard disk etc.

Contract Management

Contract management lets you maintain a record of your contracts with third-party vendors for the assets they cover.

Contract Manager

Contract manager is an agent role that lets agents view problems and changes and have full access to the contract module.

Contracts

Contracts are documents that contain the terms of services provided by the third party which enable the IT service provider to deliver a service to customer.

Conversational Portal

Conversational portal lets you report an issue, request for an item in your service catalog much more seamlessly, by chatting with a bot.

Curated Reports

Curated reports in Freshservice are out-of-the-box reports curated to suit every service desk scenario that you need to stay on top of.

Custom Apps

Custom apps are created to address your unique requirements and would be made available only to you.

Custom Roles

With custom roles, you can create agent profiles and define their access levels within your service desk.

Customer Satisfaction Survey

A customer satisfaction survey lets you measure service desk efficiency and customer satisfaction with every support ticket.



Dashboard

The dashboard will have data consolidated in real-time and shown in a single screen that will help agents prioritize and manage work better.

Day Passes

Day passes are provided to occasional agents (such as a supervisor or a visiting maintenance technician) who require access to your service desk at irregular intervals.

Department

Departments help group your requesters based on the nature of their job or position in your company.

Dependent Field

A hierarchical dropdown that lets you nest each ticket into a specific category, subcategory, and item.

Depreciation Types

Different methods to calculate the decrease in the value of assets over time. In Freshservice, depreciation can be calculated based on three types: declining balance, straight line, and sum-of-years-digits method.

Discuss (Team Huddle)

A chat interface that allows IT agents to collaborate with team members by enabling chat options with fellow agents within tickets, adding multiple agents to a conversation and even sharing files related to a particular ticket.

Discovery Agent

A discovery tool that collects your machine's hardware and software information, and updates Freshservice regularly without any intervention from the respective users. The Discovery Agent can be installed on all your Windows, Mac, and Linux machines.

Discovery Probe

A Windows application that scans your network for assets--computers running different operating systems, routers and switches, and various other devices--and adds them to your IT service desk. You can use Discovery Probe to import users from your Active Directory and schedule periodic scans.

Dynamic Placeholders

A set of placeholders with variable content that you can add to your automated emails. You can send an email that refers to the customer by name, send an update about a status change, and add a link to the corresponding ticket to retain the conversation's context.



Emergency Change

A type of change that must be introduced as soon as possible to address the needs of the organization when the normal change process cannot be followed. For example, to resolve a major incident or implement a security patch.

Employee Onboarding

A module built within Freshservice to streamline the process of onboarding (fulfill needs such as providing an ID card, new email addresses, application access, etc.) new hires.

Email Domain Restriction

A whitelist is a list of domains (IP addresses and IP ranges) which have been approved by your organization to access data. Users from domains that haven't been whitelisted will not be able to sign up, log in, or submit tickets.

Escalation Rule

An escalation rule can be configured when creating custom SLAs. For example, you can choose who you want to escalate the ticket to when the ticket hasn't been resolved over a specified period of time.



Feedback Widget

A type of widget that lets you embed a ticket form directly into your website or product. You can customize the look, feel, and placement of the widget on your company website.

Financial Management

A module within Freshservice that lets you manage the depreciation (decrease in the value) of assets. Depreciation can be calculated in three modes - Declining Balance, Straight Line, and Sum-of-Years-Digits method. The book value of the asset will be displayed in the Asset/CI page based on the method of Depreciation.

First Response

The method through which the agent responds to the end-users/customer the first time after the ticket is raised. In Freshservice, replying to the ticket or adding a public note qualifies as a First Response.

First Response Time

The duration taken by agents to respond to the end-users/customers after the ticket is raised for the first time.

Form Fields

Additional field elements with which you can customize and add fields for tickets, problems, changes, and releases apart from default ticket forms.

Form Templates

A template that lets administrators pre-fill new ticket and change forms with specific values. These are standard operating procedures for frequently occurring tickets/changes.



Gantt View

A chart that represents the detailed overview of project tasks, its sub-tasks, task status, and their dependencies against a linear timescale.

Global Access

Agents with Global Access can view all tickets within the IT service desk.

Group Access

Agents with Group Access can view all tickets belonging to their group(s) and those tickets assigned to them.

Groups

A collection of all the users/employees in your organization who can be categorized into Agent Groups or Requester Groups to manage organizational workflows.



Helpdesk URL

A vanity URL that contains your domain name or a relevant keyword for branding purposes. This custom URL can be created to point your support URL yourcompany.freshservice.com to your own domain, like helpdesk.mycompany.com. This lets customers and support agents access your support portal in your own domain.



ID (Identifier)

A unique indicator for every ticket created within Freshservice. The ticket ID has two parts: the ticket type indicator and the number. For example in INC-250, INC stands for incident and 250 is the ticket number.

Impact Analysis

An assessment that documents the possible risks associated with a Request for Change (RFC).

Incident

An Incident is an unplanned interruption to an IT service or a reduction in the quality of an IT service.

Incident Management

An ITIL® framework module that is responsible for proper logging, analyzing, and especially, resolving incidents. Its primary objective is to help resume service operations as quickly as possible.

Insights

The insights tab in the knowledge base module helps you view the articles which need improvement. The usefulness score of an article is calculated based on the total views, 'helpful' and 'not helpful' votes received by that article.

Inventory

Hardware and software items that can be discovered manually or by using tools within your organisation.

Inventory Management

A module within Freshservice that helps you track and evaluate all your IT assets in stock and in use, such as contracts, hardware, software, and other configuration items. This makes it easier to avoid loss and plan purchases, while taking into account up-to-date information on all your assets.

IP Whitelisting

A process by which you can restrict access to your support portal to only trusted locations and networks. This way, you can make sure that only your employees can sign in to your service desk by whitelisting the IP addresses that you expect people to sign in from.

ITIL

ITIL is a framework that teaches the best practices to implement ITSM in an organization.

ITSM

IT service management is a set of practices, policies and procedures that help to manage the services delivered to end users.



Keywords

Keywords are ideas / topics that define what the solution articles in your knowledge base are about and are used to optimise search for the end users.

Known Errors

Problems that have a documented root cause and a workaround. Known errors are created and managed throughout their lifecycle with problem management.



Lease Contract

A legal contract that contains all the information associated with an extended rental agreement under which the owner of the leasing equipment allows the user to make use of the equipment, in exchange for periodic lease payments.

License Contract

A legal contract between a vendor and end-user that documents and highlights the terms of use for software licenses.

Loaner Item

A service item that can be requested by an end-user for a specific period of time. For instance, if a user is traveling to a 3-day event and needs an iPad or a tablet just for that duration, it doesn't need to be permanently assigned to them. Once the item is returned to the IT team, it can be made available in the service catalog again.



Maintenance Contract

A legal contract that states the terms and conditions of routine maintenance service between the vendor and end-user.

Maintenance Window

A defined period of time during which you can schedule planned changes, view the changes implemented on an asset, group relevant changes and even include ad-hoc changes to the calender window.

Major Change

Major change is a high risk and high impact change that could potentially interrupt production and live environments if not planned properly. Examples of major change include migration from one datacenter to another; replacing an existing enterprise solution (ERP).

Managed Assets

Assets scanned and discovered using the Discovery Probe or Discovery Agent tools are considered to be Managed Assets.

Marketplace

An application distribution platform provided by Freshservice that has over three hundred plus integrations and categorizes apps based on their functionality. This lets you select required apps grouped under various categories such as agent productivity, assets & alerts monitoring, chat, phone & video, CRM, G suite, Office 365, issue tracking, reporting & analytics, time tracking & billing, user management and many others.

Metrics

A unit of comparison in the Analytics module that helps collate, compare, and create widgets for your service desk based on parameters and indicators such as the number of tickets assigned to agents, number of tickets resolved, number of tickets resolved with or without an SLA breach, etc.

Minor Change

Minor changes are non-trivial changes that have low impact and low risk. While they do not occur frequently (e.g. website changes), they undergo every stage of the change lifecycle, including CAB approvals.

MSP

A managed service provider (MSP) is a company that provides multiple IT services such as web hosting, business applications, and network and security management either through their own data center or that of a third-party cloud partner.



Occassional Agent

A person who can access your service desk at irregular intervals to monitor tasks or aid in services. For example, a supervisor or the visiting maintenance technician.

Onboarding Checklist

A customization option that lets you modify the template of onboarding tickets by creating child tickets to the onboarding request raised by the HR personnel.

Onboarding Forms

Customizable form fields in the Employee
Onboarding module that can be set up to be filled
by HR personnel, reporting managers, and new
employees while initiating onboarding requests.

Overdue

A ticket state which denotes that the agent has missed resolving the ticket in the time allotted by the SLA and the promise the company has made to the customer is broken.



Parent Ticket

Any existing ticket can become a Parent Ticket by associating another related ticket as a Child Ticket. Once a Child Ticket has been tied to a Parent Ticket, any updates made to the Parent Ticket will reflect upon its Child Ticket(s).

Pending

A ticket status which denotes that the SLA's timer is paused. This is a means to signal that the agent requires more time to find a solution to resolve the ticket.

Permanent Solution

A Permanent Solution is one that completely resolves the underlying problem by eliminating its root cause. It prevents any more Incidents from being caused by that specific problem.

Portal Customization

A customization option for your support portal which lets you add and set up elements such as styles, colors, font, company logo, and favicon to match the look and feel of your brand.

Portal Layout

A customization option that helps you modify the layout of your support portal. The Portal Layout can be modified in four aspects - The Head, Header, Footer, and Page Layout.

Prime User

An end-user who can view all the incidents and service requests within their department.

Priority

A parameter that can be assigned to each ticket which indicates how important it is to resolve/close the ticket. There are four stages of priority: Low, Medium, High, and Urgent.

Priority Matrix

A table that consists of three levels of priority that helps standardize priority decisions within the organization. Priority Matrix allows an admin to define what priority should be implemented based on each combination of Urgency and Impact associated with an incident.

Priority = Impact x Urgency

Private Notes

The exchange of information between you and your team members while working on a ticket, invisible to your end-users/customers.

Problem

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.

Problem Manager

A role with which an agent can perform all agent-related activities, view and create changes, and have full access to the Problems module.

Projects

A projects is a temporary grouping of people and other assets that is required to achieve an objective or other outcome. Each project has a lifecycle that typically includes initiation, planning, execution, and closure.

Product Catalog

A catalog that contains a list of products that are currently being used in your organization. The list view helps manage hardware units and software licenses for applications and maintains a repository of items with their information (such as details about the manufacturer, the availability, and the pricing of each product).

Project Manager

A role with which an agent can perform all agent related activities and also have full access to Projects they own.

Public Notes

The exchange of information between you and your team members while working on a ticket, making it visible to your end-users/customers.



Quests

Business-specific goals that you can create to gamify your service desk and challenge agents to achieve badges of honour.



Rank Order

A type of widget filter in the Analytics Module that helps rank your data in the ascending or descending order.

Recent Activity

Recent Activity displays a log of all the activities that happened in your service desk within a time period specified by you.

Relationship Types

Every asset item has two types of relationships normal relationships and inverse relationships. Together, they give a comprehensive report about how one particular asset is tied to the other assets in your organization.

Release

A release is a collection of authorized changes to an IT service, which are tested and deployed into the live environment together.

Release Management

Release management plans, schedules and controls the movement of a release so that the integrity of the live environment is protected.

Release Manager

Release manager is an Agent role that can be assigned to agents who can can view, respond to tickets and releases and modify their properties.

RFC

Request for change is a formal request for the implementation of a Change placed by requesters via the end user portal.

Reporting Manager

Reporting manager is the manager of requesters and agents to whom the approval requests and escalations are sent.

Reports

The reports module in Freshservice contains a list of reports designed to give you insights into the efficiency of your service desk. The module contains 30+ reports split under three categories: incidents, changes, and assets.

Requested Items

Requested Items are the service items requested by an end-user that gets displayed in a service request ticket. **Requester** A requester is the end-user who raises issues or

service requests to the service desk.

ResolvedResolved is a ticket status which defines the

pre-final stage of the ticket lifecycle where the

ticket requester's problem has been solved.

Restricted Access Agent roles with restricted access can view only

the tickets that have been assigned to them.

Roles Agent roles allow you to create access privileges to

specify what an agent can access and view within

your Freshservice instance.

Root Cause Analysis (RCA) is the systematic

process of finding and identifying the root cause of

a problem.

S

Sandbox Sandbox is a simulated environment in which you

can test out workflows and configurations before

syncing them with your Freshservice account.

Salvage value is the estimated resale value of an

asset at the end of its useful life. Salvage Value =

Fixed Asset Cost - Depreciation cost.

Scenario Automations Scenario automations let you automate multiple

pre-set updates to a ticket with a single click where you have to carry out the same series of

tasks repetitively.

Scheduler lets you schedule tickets at periodic

intervals for tasks that have to be repeated.

Scope

Scope lets you choose the access level for an agent role: global access, group access, or restricted access.

Score Card

A score card is a dashboard widget which displays the ticket count based on criteria such as ticket views and the modules.

SD Agent

An SD agent is an agent role that can be assigned to agents who can log, view, reply, update, resolve tickets, and manage contacts.

SD Supervisor

An SD supervisor is an agent role that can be assigned to agents who can perform all agent related activities and access reports, but cannot access or change configurations in the admin tab.

Service Catalog

The Service catalog organizes and maintains a structured list of all the services and assets that your business provides for your end-users to browse and request from.

Service Categories

Service categories are the categories under which service items can be organised in the service catalog. For example: Hardware, Software.

Service Item

Service items are the individual services that are listed on the service catalog for the end-users to request.

Service Request

When end-users request items from the service catalog, they are created as tickets in the service desk called service requests.

Service Request Fulfillment

Service request fulfillment lets agents search for an item in stock and allocate it to the requester within the ticket's page.

Session Timeout

In case you are inactive in Freshservice for a pre-defined time, the software automatically logs you out. This is called session timeout.

Single Sign-On (SSO)

Single sign-on (SSO) is an authentication process that allows agents to access multiple applications with one set of login credentials.

SLA Policies

SLA policies define the time within which agents should respond to or resolve tickets based on ticket priorities and also to set automatic escalation rules to notify specific agents about SLA violations.

Software Asset Management

Software asset management in Freshservice allows you to manage all the software assets across your organization's network.

Solution Category

The knowledge base is is categorized into a three-level hierarchy and a solution category holds a group of related content.

Solution Status

The solution status is used to indicate whether a solution article is a published article or a draft.

Solution Type

A solution type is used to classify a solution article as either a permanent solution or a workaround.

Solutions

Solutions are articles or documents that contain information about various aspects of your company and FAQs to promote self-help within your support portal.

Standard Changes

Standard changes are pre-planned, pre-approved changes that occur at regular intervals. Being low-risk and low-impact, these changes do not require CAB approval.

Supervisor

The Supervisor helps you define workflows based on time and event-based triggers in your help desk and runs once every hour to process all recent tickets updated in the past 30 days. Supervisor rules are processed sequentially, but a rule may cause certain actions that trigger subsequent rules.

Support Channels

Support channels are the various means by which your empoyees can reach out to your IT service desk.

Support Portal

A support portal is the go-to place on the internet for end-users through which they can raise tickets for any issues, request a service from the service catalog, or browse solution articles.

Symptoms

Symptoms allows you to record the signs which indicate the existence of a problem.

Sync Error

A sync error in sandbox includes activities such as creation or deletion of new or existing status, transitions, node, event or action in both your Freshservice account and Sandbox account.



Table View

In the table view, you can choose the ticket fields you want to display and their order them in the form of rows and columns. Table view can be enabled across the ticket, problem, change and release modules.

Tags

Tags are keywords used in tickets, articles, and requester profiles to enable search within your service desk.

Task Calendar

The task calendar is used to view and organise all the tasks assigned to you in a calendar. You can view tasks assigned to other agents in your group, unassigned tasks, and tasks of other agent groups within FS.

Tasks

A task is a unit of work assigned to an agent from tickets, problems, changes, releases or projects module.

Ticket Activities

Ticket activities tab is used to view all the actions performed on a ticket either by agents or by automations.

Ticket Age

Ticket age is used to define the time period for which an issue has stayed in queue without resolution.

Ticket Filters

Ticket filters are properties or criteria using which agents can view certain types of tickets.

Ticket SLA Metrics

Ticket SLA metrics is a dashboard widget which displays the SLA metrics for tickets based on the info from the last 30 days for a particular agent or a group.

Ticket Views

Ticket views refers to the list of tickets as they are visible to agents. While the default ticket view lists tickets with information such as source, type, status, assignee agents and tags, you can use other filters to customize the view.

Tickets

Tickets are typically captured in an IT service desk where they are stored, managed and updated as the issue or request is resolved. Tickets can be incidents or service requests.

Time Entry

Time entries are recorded by agents within a ticket to track the duration of time spent by agents working on their respective tickets.

Time Tracked

Time tracked defines the overall time spent on a ticket by taking into account the time entries made in it.

Transitions (Change Lifecyle)

Transitions in change lifecycle refers to every pass from one change status to another.

Ticket Closure Rules

Closure rules are rules which mandates adding time entries to tickets, closing child tickets and tasks for ticket closure and resolution.



Urgency

Urgency is a measure of how quickly a ticket should be resolved.

Useful Life

Useful life of an asset is defined as the time for which an asset can function under standard operating conditions.

User Field Mapping

Freshservice provides you a default field mapping between the fields in your Active Directory and the default requester fields in Freshservice.

User Fields

Fields that capture requester and agent data are called user fields.



Vendor

A vendor is an organization that provides IT assets (or other products/services) to your company.

Vendor Management

Vendor Management describes the activities an organisation should perform to obtain the best value from their vendors including vendor research, obtaining pricing quotations, understanding turnaround times and ensuring payment requirements are met.



Watchers

Adding an agent as a watcher lets them monitor a ticket by enabling notifications about the ticket for the agent.

Webhook

A webhook is a "callback" to an application or web service that is triggered when a specific event occurs. When certain update, change or action occurs, webhooks can be used to push data to an external application.

Workaround

Workarounds are temporary solutions aimed at reducing or eliminating the impact of known errors for which a full resolution is not yet available.

Workflow Automator

Workflow automator is used to create workflows to automate all the repetitive tasks and manual processes that agents perform regularly. Every workflow consists of an event, condition and an action.

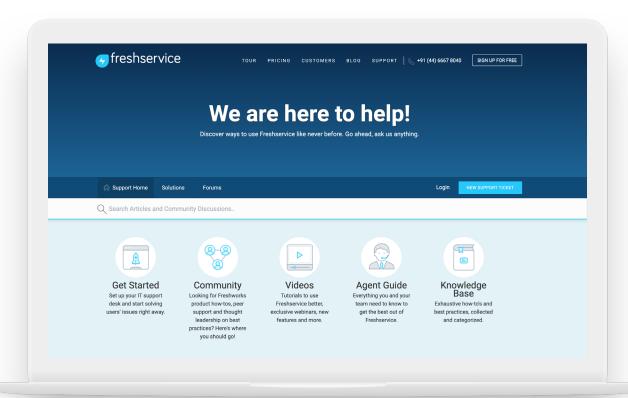
About Freshservice

"Freshservice is the right-sized solution that can extend digital capabilities and deliver exceptional employee productivity, for modern enterprises that seek intelligent service management solutions for their digital transformations.

Leveraging Freshworks' experience to build world-class products, Freshservice offers a cutting edge yet user-friendly solution with multichannel support."

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