Service Desk Pro

User Guide

INSTALLATION

Download trial version

You can download a fully functional 30-day trial version via the app installation package and SharePoint App Catalog. The app is installed in the context of a specific SharePoint Site (e.g. main intranet site or IT Site). The installation procedure is described on the product site (the blue button "Get Free Trial"): https://ivero.net/solutions/ServiceDeskPro/index.html

> **The account you use to install SharePoint apps needs to have "Full Control" permission to the SharePoint Site where the app is installed. You can achieve it via membership in the Site Owners group or adding a user to the "Site Collection Administrators" group.**

USER ROLES

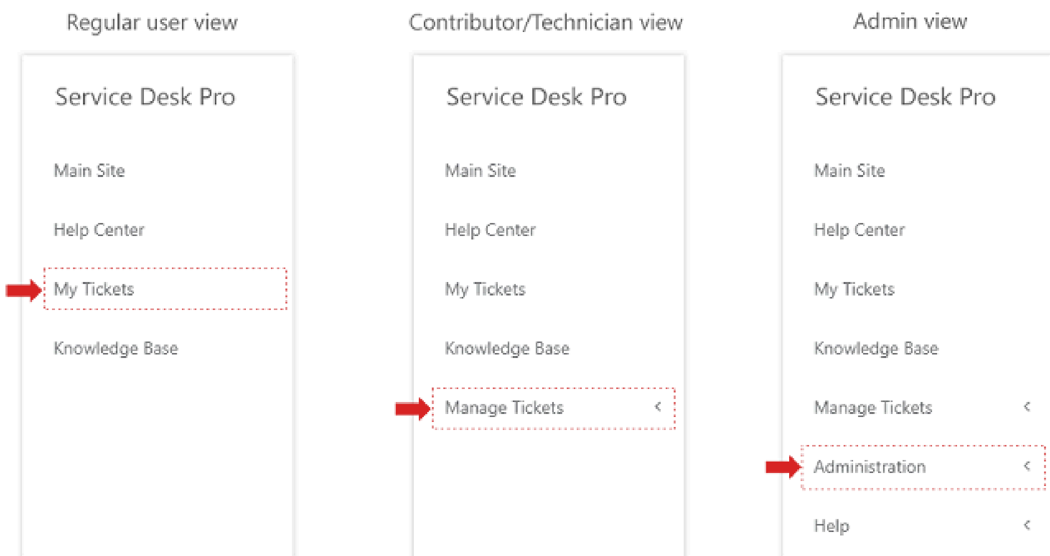
Service Desk Pro offers four predefined user roles:

- **Regular user** - can submit a ticket and sees only own data
- **Agent with Contributor role** - can manage only assigned tickets under the "Manage Tickets" section
- **Agent with Technician role** - can manage all tickets created from assigned templates under the "Manage Tickets" section.
- **Agent with Administrator role** - can manage tickets created from assigned templates under the "Manage Tickets" section and all tickets under the "Administration" section

There is no need to create a regular user role - each user with access to the SharePoint Site has a regular user role by default. Agents (Contributors, Technicians, and Admins) can be assigned under Administration->Configuration->Agents.

Section “Ticket Management” is designed for the operational work of agents in the context of assigned ticket templates (e.g. IT Network Support Engineer can work only on network-related tickets). **To see tickets from assigned templates under the "Ticket Management" sections**, technicians and admins **must also be assigned to the ticket template** under Administration->Configuration->Ticket Templates->Edit->field "Agents".

Depending on the user role, users see different menu options (presented in the below diagram).



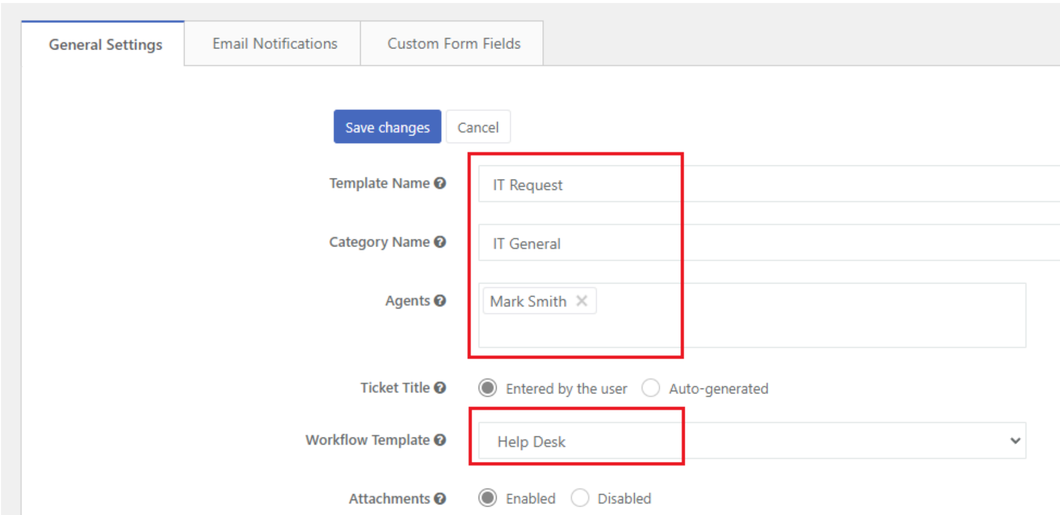
CONFIGURATION (ADMIN’S GUIDE)

Minimal configuration steps to submit a test ticket

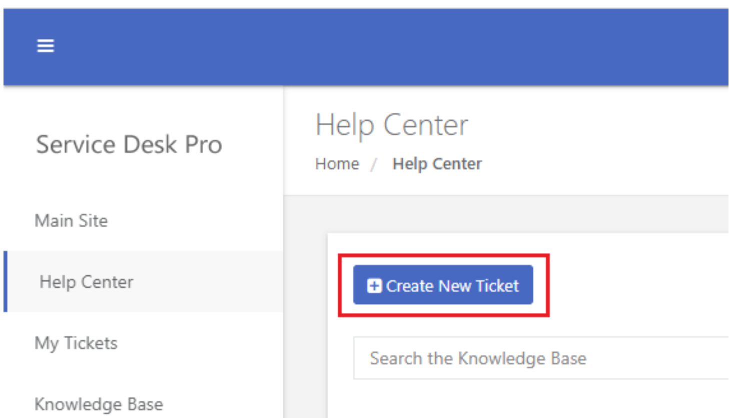
Here are minimal configuration steps to submit a test ticket (button "Create new ticket" on the main app page):

Step 1) Create at least 1 ticket template under Administration->Configuration->Ticket Templates:
a) enter "Template Name" (mandatory field)
b) enter "Category Name" (mandatory field)
c) select user in "Agents" (mandatory field) - you can add your test account
d) select "Workflow Template" (mandatory field), for example, "Help Desk"

The rest of the fields in ticket template can be the default.
Click "Save changes" to save the template.



Step 2) Click “Create New Ticket” on the main app page:



Typical configuration steps

Step 1) Configure system settings under Administration->Configuration->System Settings

- tab"General" - allows set up general settings
- tab"Logo&Colors" - allows customizing logo&color (main color theme)
- tab" Translations" - allows language translation for regular user and manager views (except section "Administration").
- tab"SLA" - allows set up Service Level Agreement thresholds
- tab" Reports Columns" - allows customizing data table columns for predefined ticket reports
- tab "Email Notifications" - contains instructions on how to run email notifications via Power Automate
- tab "Inbox" - contains instructions on how to run Inbox (incoming emails) via Power Automate
- tab "Integrations" - allows running integrated SharePoint list

Step 2) Adding agents under Administration->Configuration->Agents

Step 3) Customizing workflow template(s) under Administration->Configuration->Workflow Templates (Optional)

Step 4) Creating ticket template(s) under Administration->Configuration->Ticket Templates (Mandatory)

Step 5) Configuring email templates under Administration->Configuration->Email Templates (Optional)

Step 6) Creating custom views under Administration->Configuration->Custom Views (Optional) -

Step 7) Creating knowledge base categories under Administration->Configuration->KB Categories (Optional)

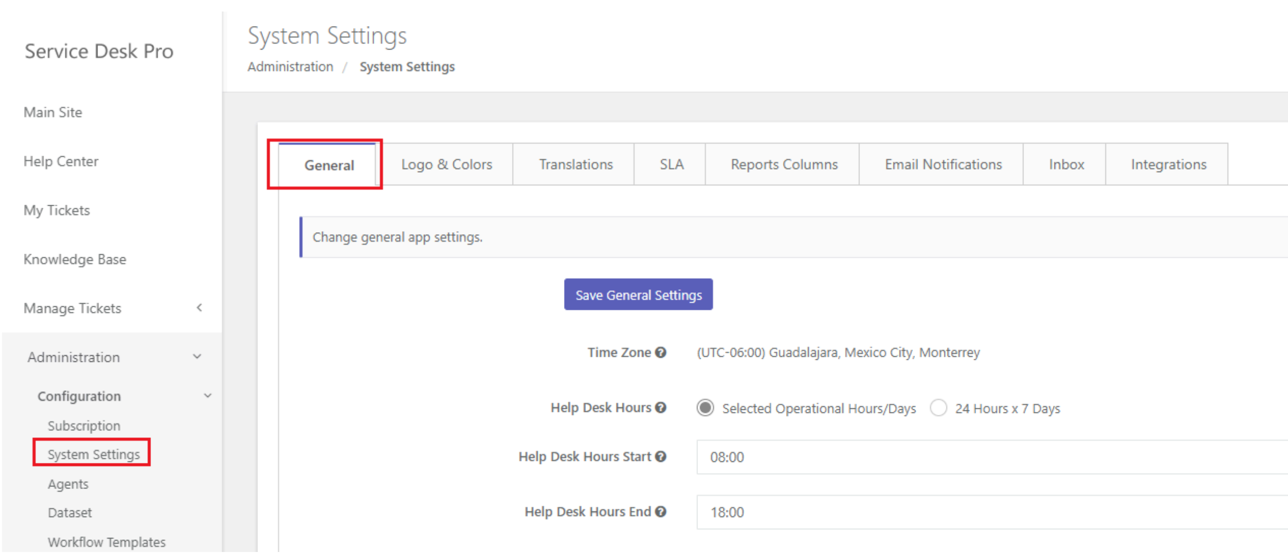
Step 8) Creating knowledge base articles under “Knowledge Base” section (Optional)

Step 9) Import existing tickets from MS Excel spreadsheet under Administration->Reports->All Tickets->button “Create”-> Create in bulk (Optional)

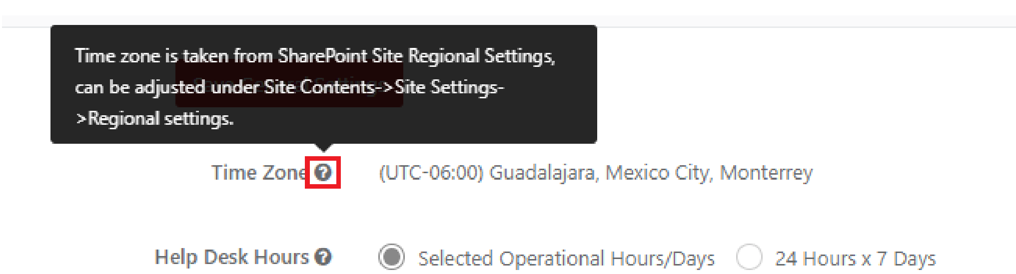
General System Settings

General settings overview

System settings are available for agents with the “Administrator” role under Administration->Configuration->System Settings->tab General”. To apply changes, please click the button “Save General Settings”.

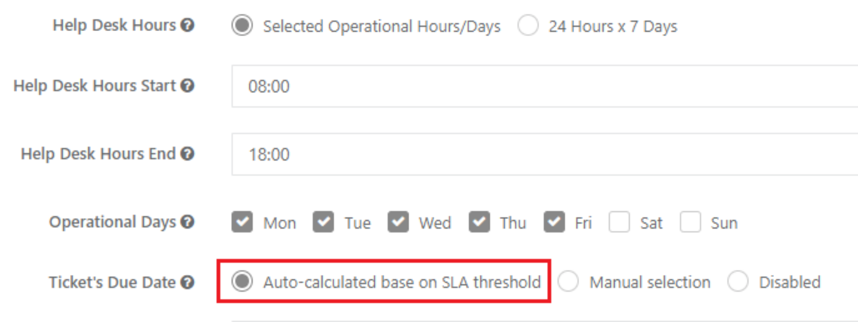


To get more info about a particular setting, move the mouse pointer on the help icon and look at the item tooltip.

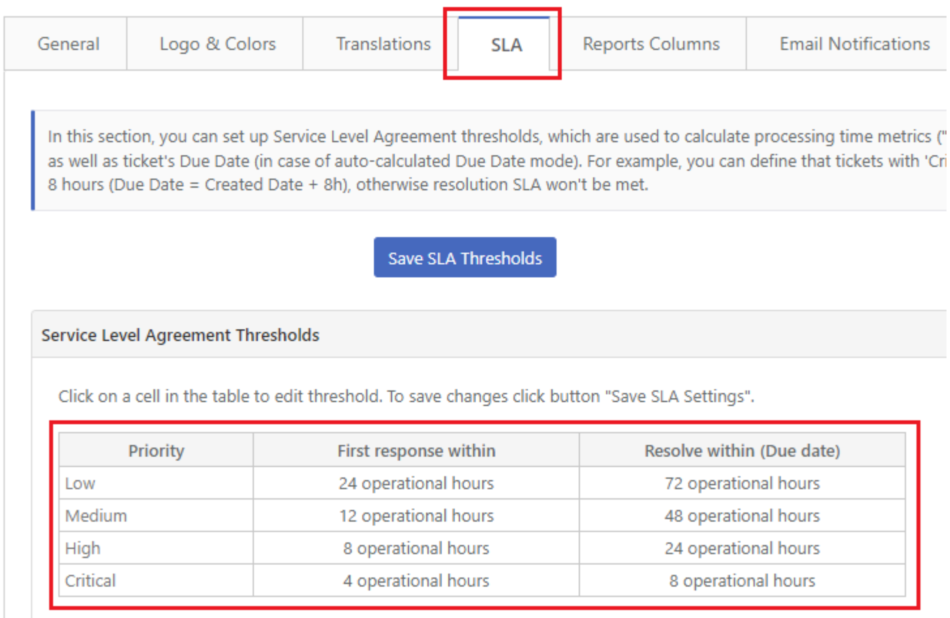


Automatic calculation of Due Date based on ticket priority and SLA levels

There are 3 settings: Help Desk Hours Start, Help Desk Hours End, and Operational Days which allow you to set up help desk hours within a work week. Operational days are used to automatically calculate the Ticket's Due Date (assuming that the Ticket's Due Date is set up for automatic calculation).



SLA tresholds are customizable under the tab “SLA”. You can click on a cell in the table to edit the threshold. To save changes click the button "Save SLA Tresholds".

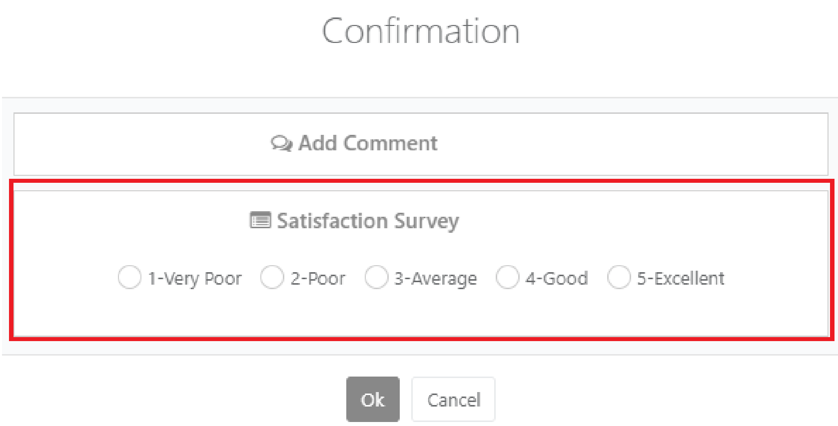


Priority	First response within	Resolve within (Due date)
Low	24 operational hours	72 operational hours
Medium	12 operational hours	48 operational hours
High	8 operational hours	24 operational hours
Critical	4 operational hours	8 operational hours

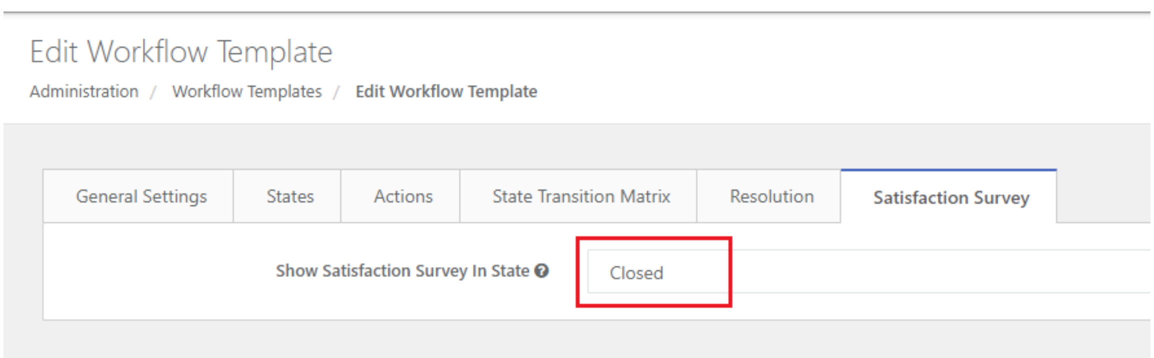
Example scenario:
- operational hours are set up to 9. A.M - 7 P.M from Monday to Friday,
- SLA Thresholds for “High” priority are set up to 'Resolve within 8 operational hours'
- a ticket with “High” priority is submitted at 6 P.M on Monday
- auto-calculated ticket Due Date is 4 P.M on Tuesday (6 P.M + 8h, omitting non-working hours).

Satisfaction survey

When the option “Satisfaction” survey is enabled under the tab “General Settings”, the app allows a user who closes a ticket to fill out a satisfaction survey on a 5-point scale (1-5).



In default help desk workflow app display a satisfaction survey in the “Closed” state, but it can be customized under Administration->Configuration->Workflow Templates->edit->tab “Satisfaction Survey”.



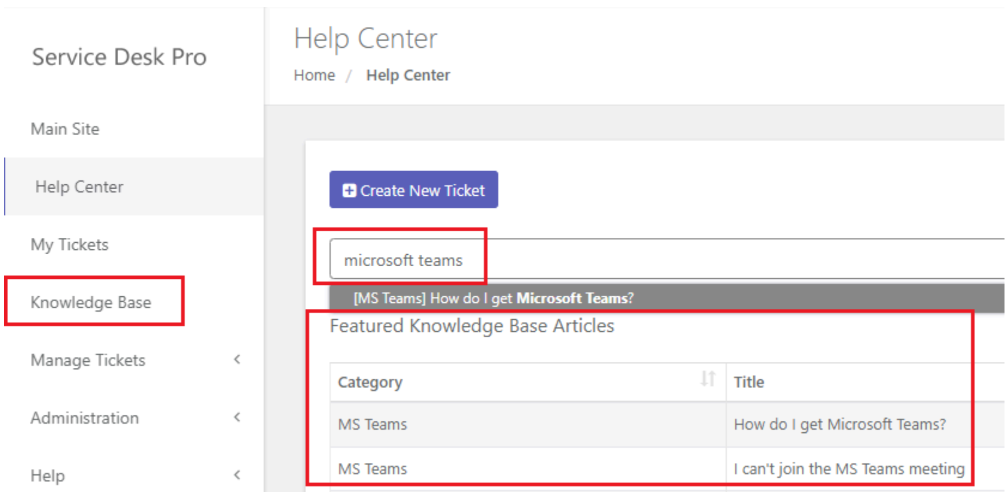
The satisfaction survey report is available for agents under:
1) Manage Tickets->Satisfaction Surveys (display results from assigned ticket templates only)
2) Administration->Reports->Satisfaction Surveys (display results from all tickets)

To get more info about reports please read section “Built-in ticket reports”.

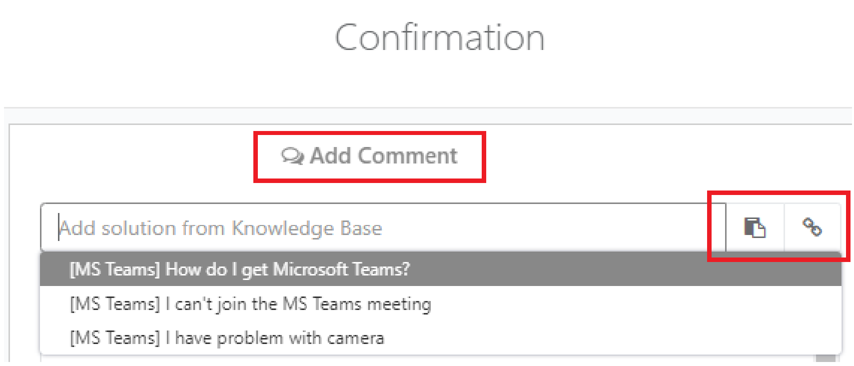
Knowledge base

When the option “Knowledge Base” is enabled under the tab “General Settings”, the app displays Knowledge Base for users. A knowledge base helps employees find the information they need quickly and efficiently. Knowledge base articles can be found by using three ways:

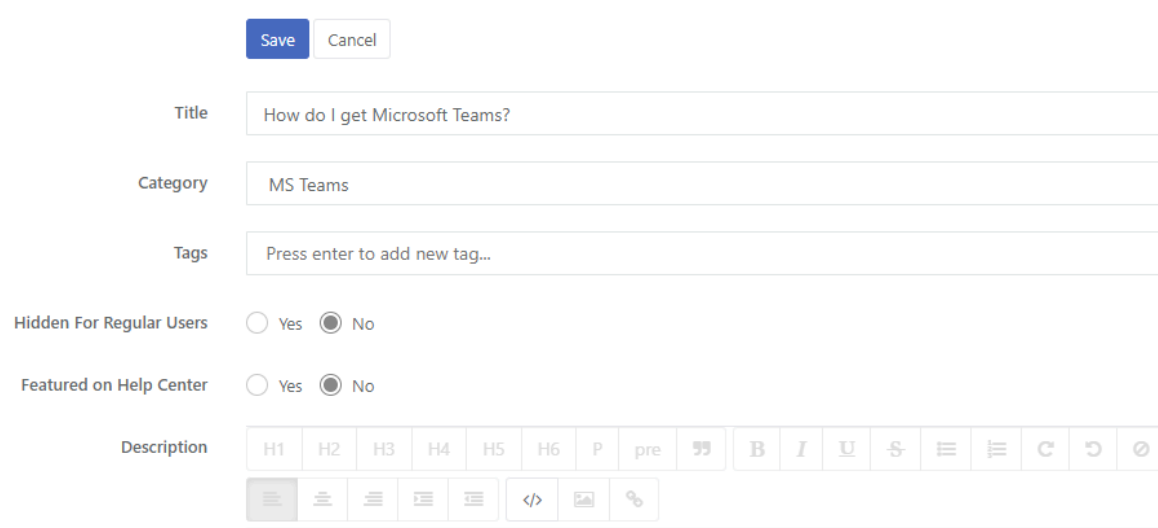
- browsing all articles under 'Knowledge Base'
- “Featured Knowledge Base Articles” can be found under 'Help Center'
- use the search box on the “Help Center” to find articles



Additionally, technicians can attach knowledge base articles as ticket resolution to ticket comments.

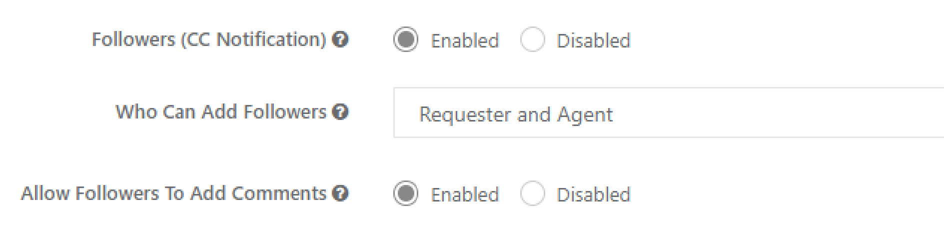


Knowledge base articles can be created by users under the link “Knowlege Base” in the left menu (depends on permission “Who Can Create/Edit KB Articles”)



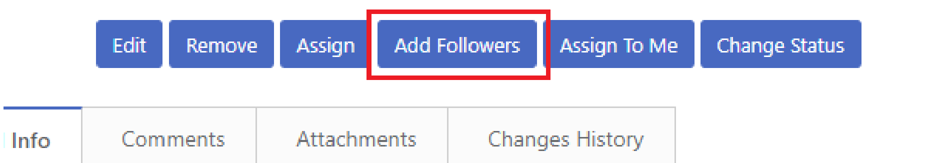
Ticket followers

When this option is enabled, users can add Followers to the ticket. Followers receive email notifications about ticket changes and can open a ticket from the email notification level (link the ticket) **in the read-only mode.**



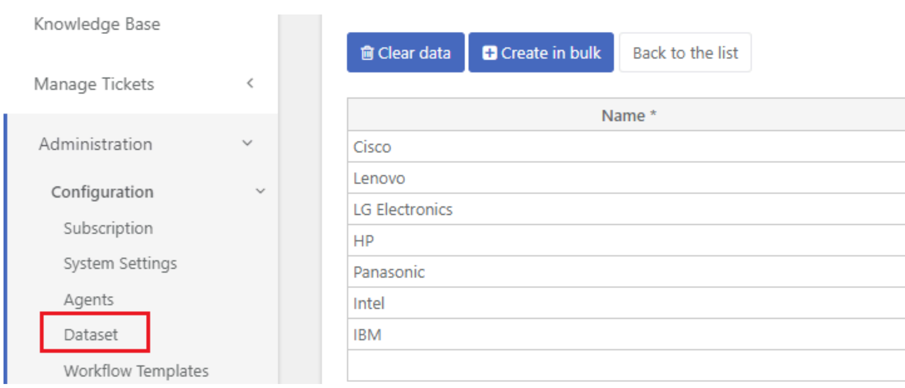
Users can add followers on the ticket creation form:

or on the ticket details page:

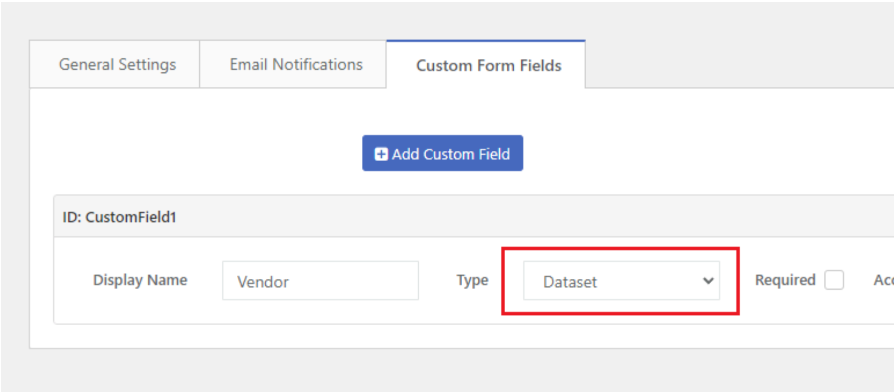


Dataset

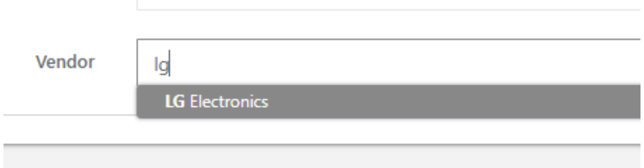
This option allows using a new type of custom field called 'Dataset' that allows populating the choice field options on the ticket form from a large dataset (dictionary). Example usage: list of vendors, countries etc. Dataset can be defined under Administration->Configuration->Dataset, also by using bulk import from MS Excel.



Custom fields can be defined under Administration->Configuration->Ticket Templates->Edit->tab “Custom Form Fields”. To use the “Dataset” type you need to change the drop-down list “Type.



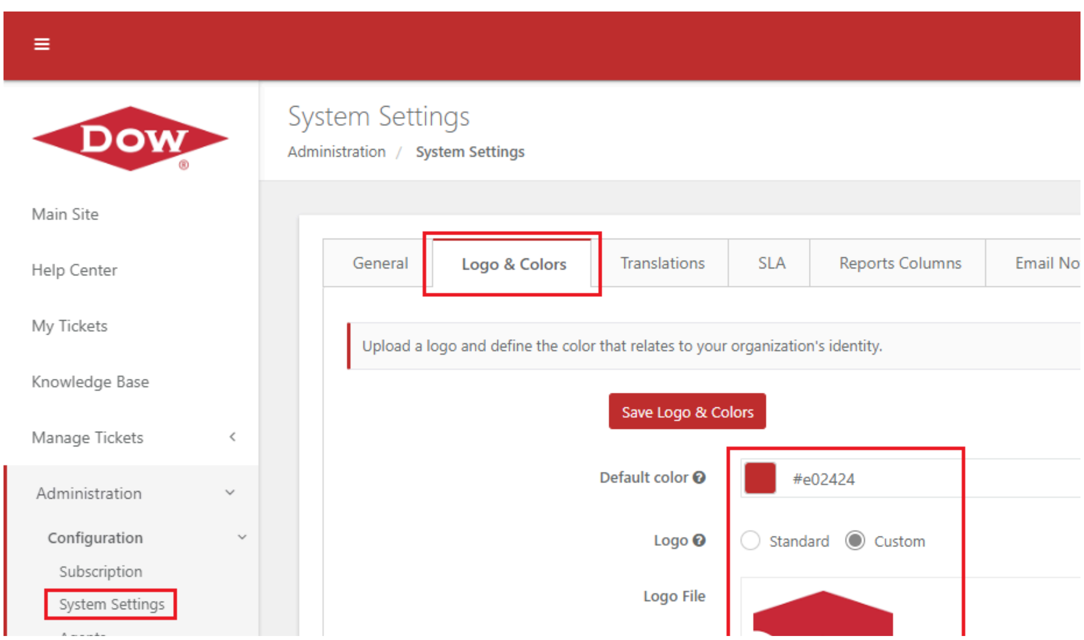
Dataset type is rendered as a drop-down list on the ticket creation/edit forms, with the ability to search by entered phrase



Change app theme (logo&color)

Under Administration->Configuration->System Settings->tab “Logo&Colors” you can upload a logo and define the primary color that relates to your organization's identity. There are three parameters that allow it:

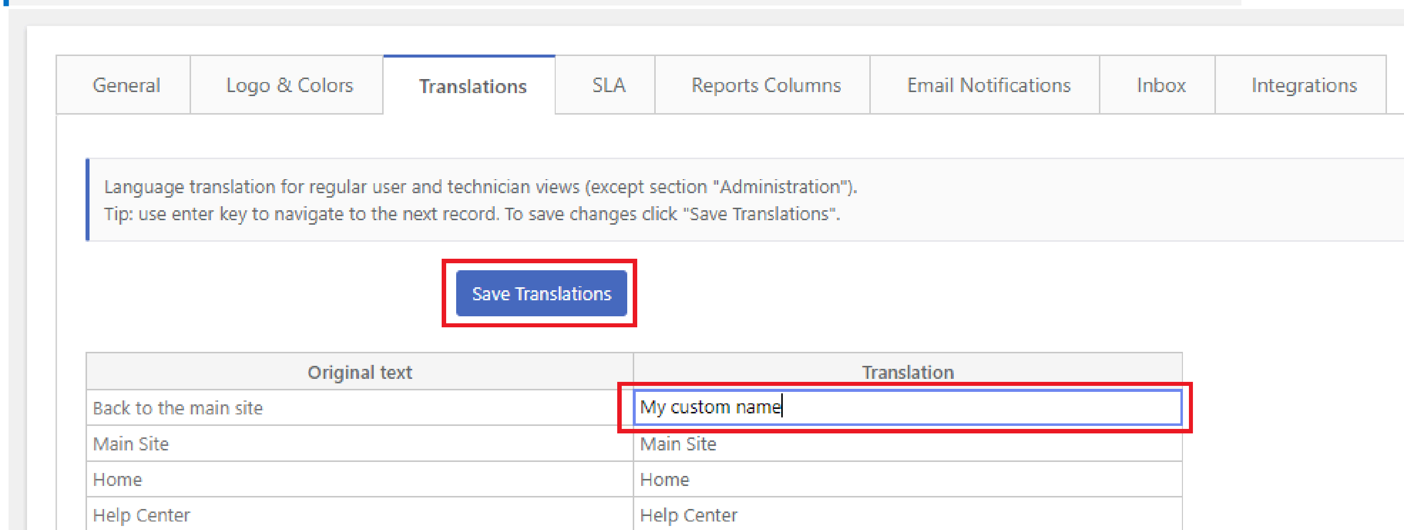
- **Default color** - color picker, you can select a color by using the mouse or paste your HTML color code
- **Logo** - you can switch this setting to the value “Custom” to upload a custom logo
- **Logo file** - file uploader widget that allows uploading your logo.



Label changes (translations)

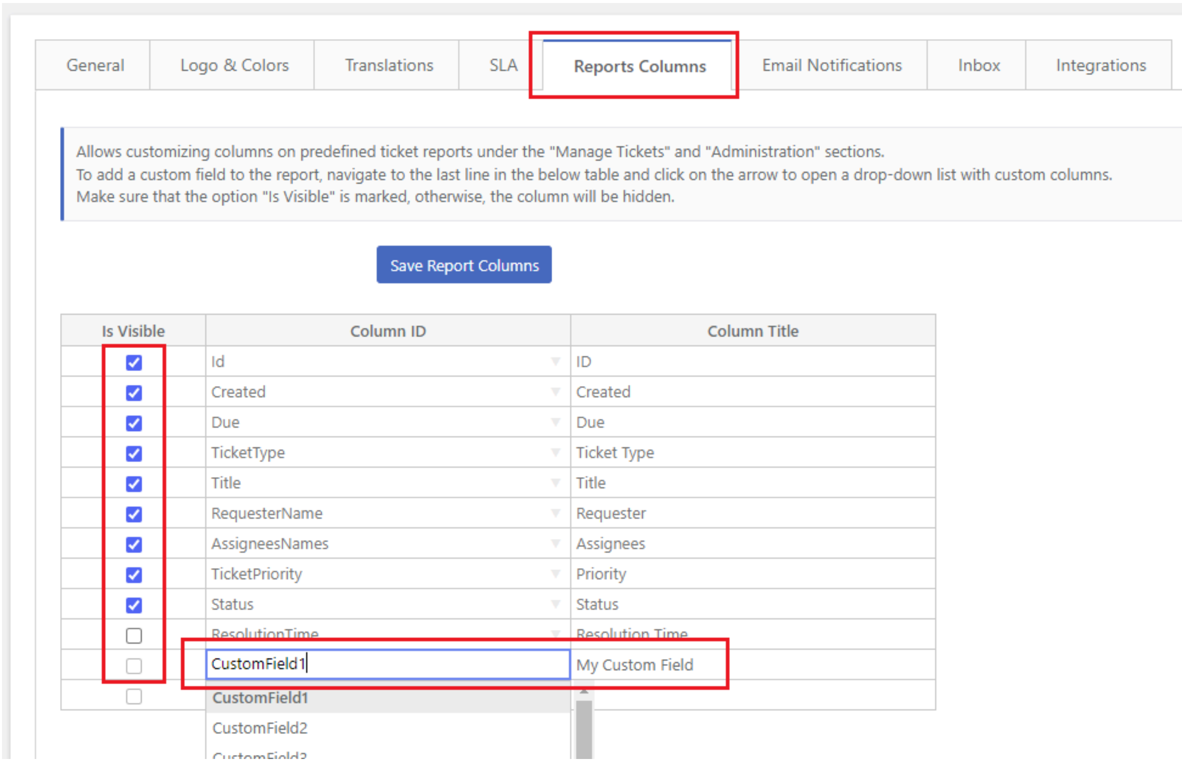
Under Administration->Configuration->System Settings->tab “Translations” you can customize labels or perform language translations for front-end app parts (except section “Administration”).

> Double-click on the cell to edit it (a single click is a selection). Use enter key to navigate to the next record. To save changes click "Save Translations".

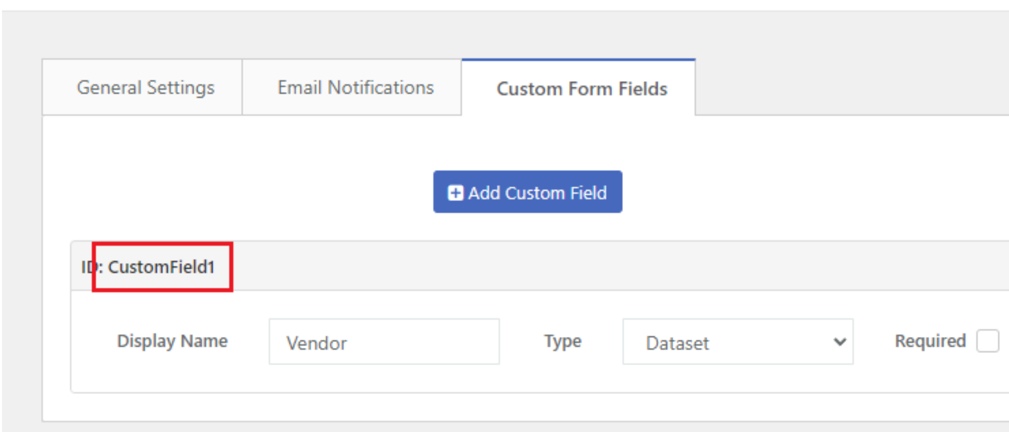


Customizing columns on ticket reports

Under Administration->Configuration->System Settings->tab “Report Columns” you can customize columns on predefined ticket reports under the "Manage Tickets" and "Administration" sections.
You can use checkboxes to enable/disable built-in ticket fields (e.g. Id, Created, Title). To add a custom field to the report, navigate to the last line in the below table and click on the arrow to open a drop-down list with custom columns.



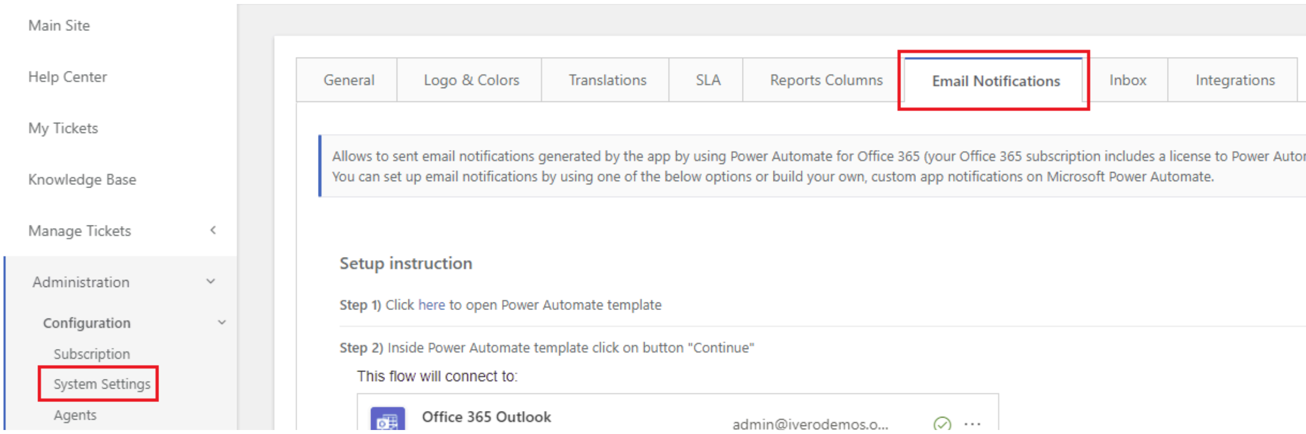
Custom field ID for the specific custom field can be found under Administration->Configuration->Ticket Templates->edit>tab “Custom Form Fields”:



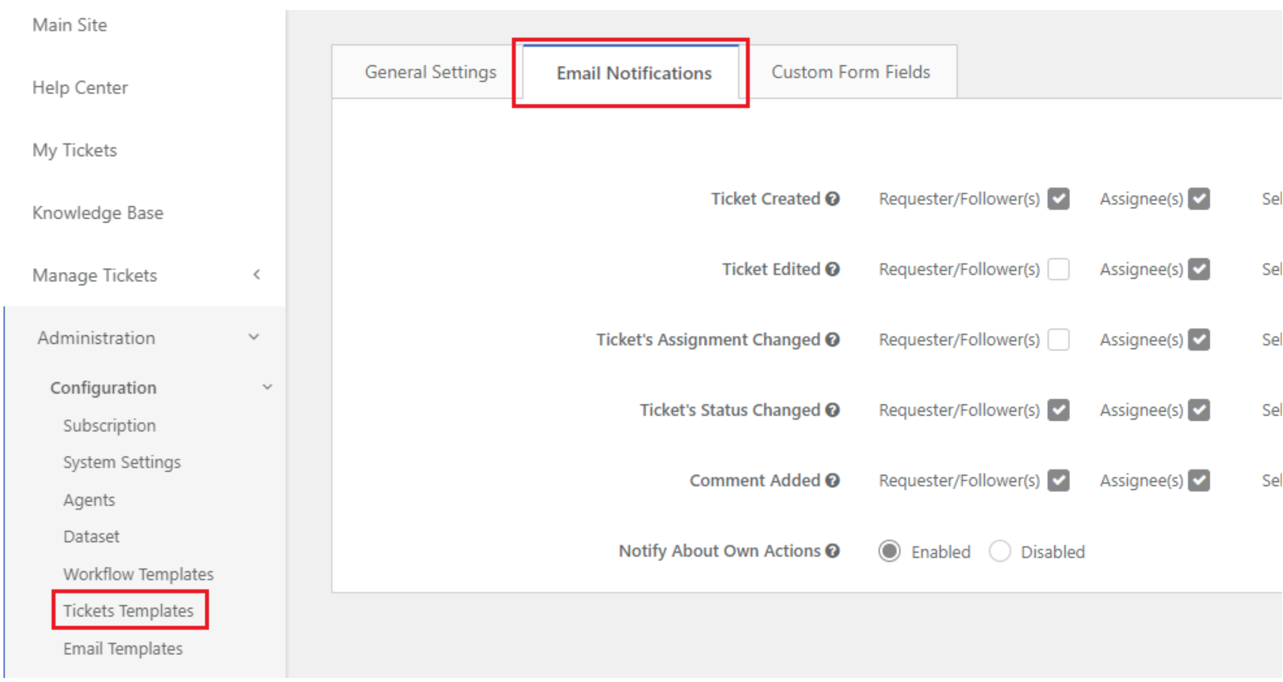
If you want to create a custom view (report) instead of modifying built-in reports please read the section “Creating custom views” to get more info.

Configuring the email notifications

Service Desk Pro allows sending email notifications about different events in the app (e.g. ticket created, status changed etc). To run email notifications you need to create a Power Automate flow (your Office 365 subscription includes a license to Power Automate). Instruction on how to create a flow for email notifications is included in the app under Administration-> Configuration-> System Settings-> tab “Email Notifications” or on the [video guide](#).

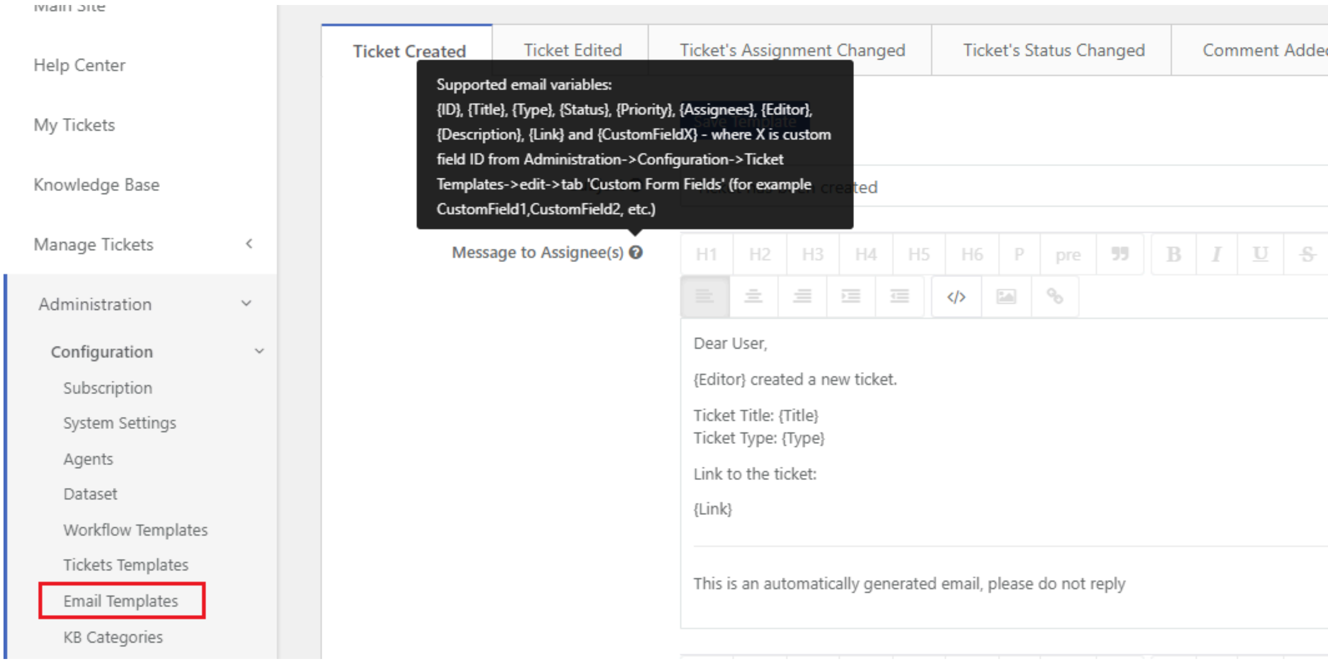


The app allows configuration of email notification schema per ticket template under Administration->Configuration->Ticket Templates->edit->tab “Email Notifications”. For example, you can enable email notification to Requester on one ticket template and disable the same notification on another ticket template.



Configuring email templates

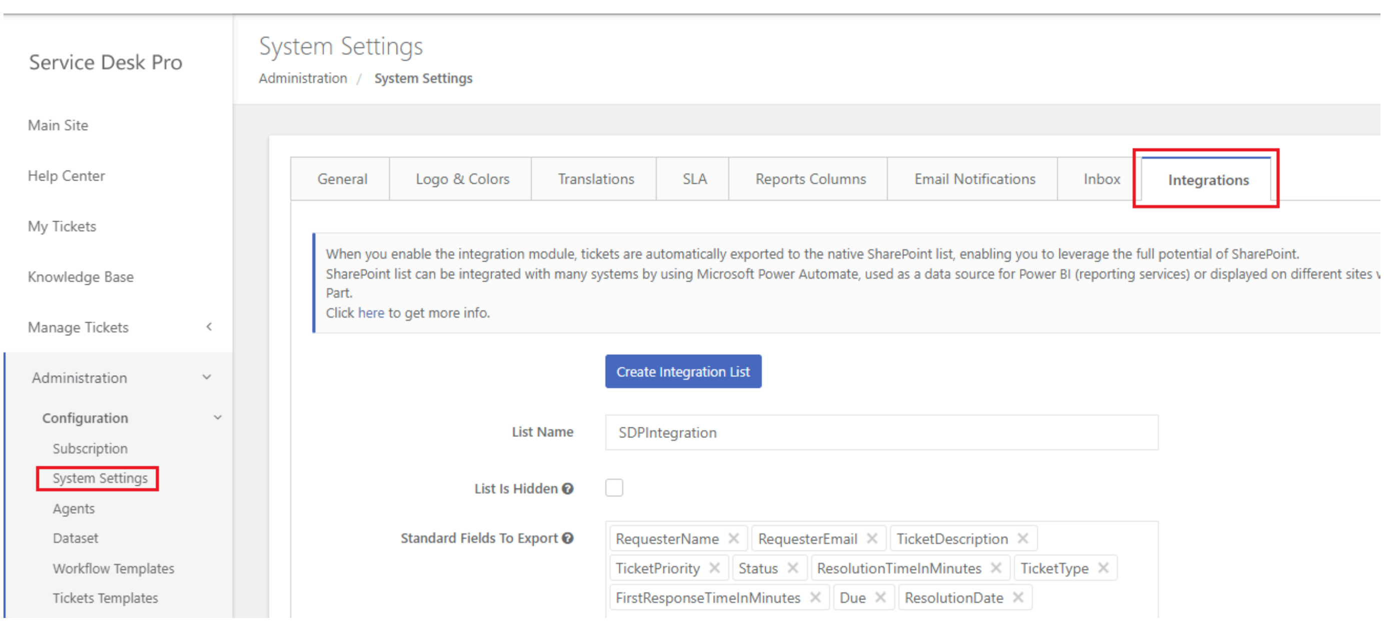
You can customize email notifications sent by the app under Administration->Configuration->Email Templates. If you click on the help icon you will see a list of supported email variables that can be used in the email subject or body. Each action (e.g. ticket created, edited etc) has a separate email notification template.



Integrations

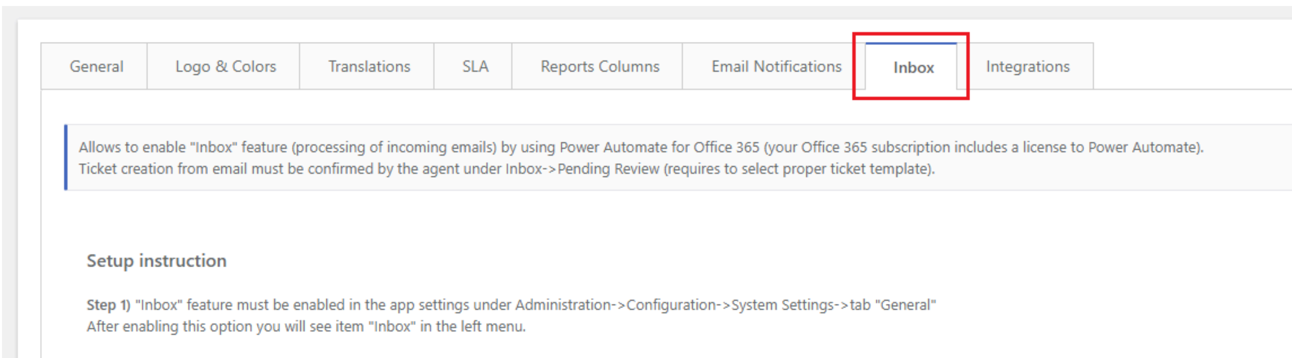
Integration module can be enabled under Administration->Configuration->System Settings->tab “Integrations”. The app allows selecting which standard and custom fields will be exported to the integration list (fields “Standard Fields To Export” and “Custom Fields to Export”).

When you enable the integration module, tickets are automatically exported to the native SharePoint list, enabling you to leverage the full potential of SharePoint and Office 365. SharePoint list can be integrated with many systems by using Microsoft Power Automate or used as a data source for Power BI (reporting services). Here is more info about this functionality.

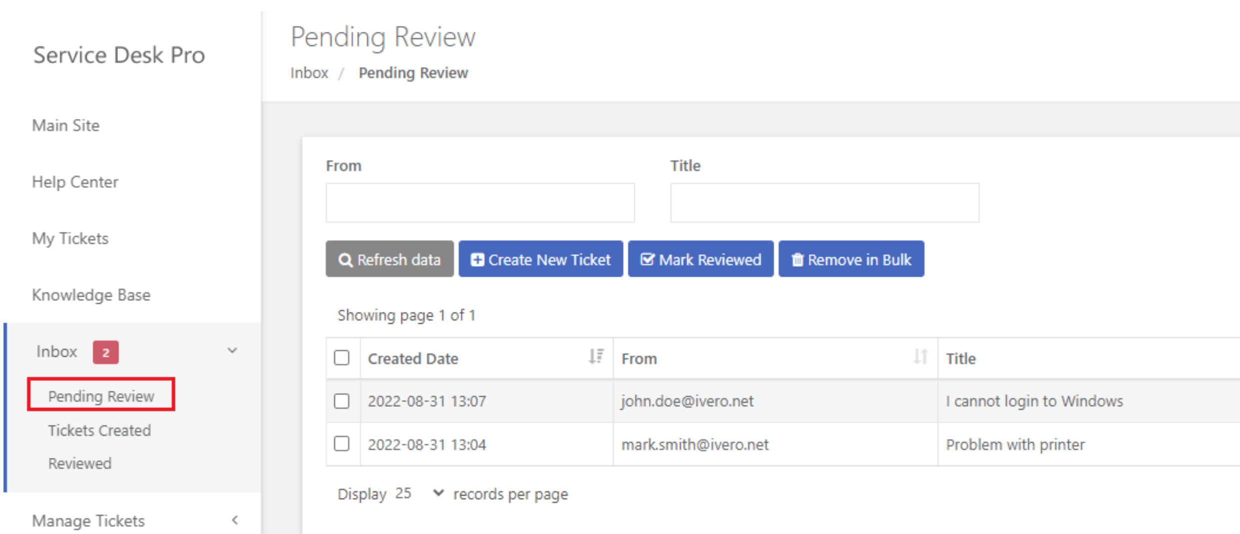


Inbox (creating tickets from emails)

When this option is enabled under general “System Settings”, you can connect to an external mailbox and create tickets for selected emails (in a semi-automatic way - requires selecting ticket template/status and confirming the ticket creation).
To configure this feature you need to perform two steps:
1) Setup “Inbox” under Administration->Configuration-> “System Settings”->tab “General” to the value “Enabled” and save changes
2) Create Power Automate flow, it’s explained in detail under Administration->Configuration-> “System Settings”->tab “Inbox” and on the [video guide.]



When Power Automate flow is created and the user sent an email to the given mailbox, you will see upcoming emails under Inbox->Pending Review (left menu)

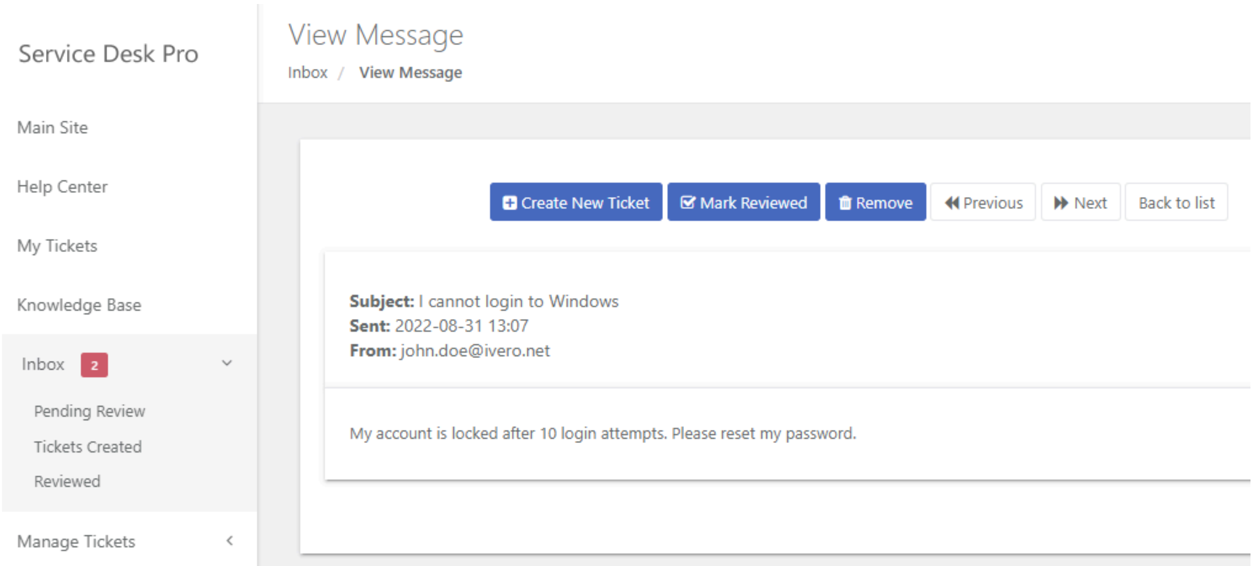


Three options can be used:

- **Create New Ticket** - converts the email into a ticket, newly created tickets are visible under Inbox->Tickets Created and under “Manage Tickets” and “Administration” sections.
- **Mark Reviewed** - marks the ticket as “Reviewed” (without ticket creation), reviewed tickets are visible under Inbox->Reviewed.
- **Remove in Bulk** - allows you to delete the email (for example, if its spam)

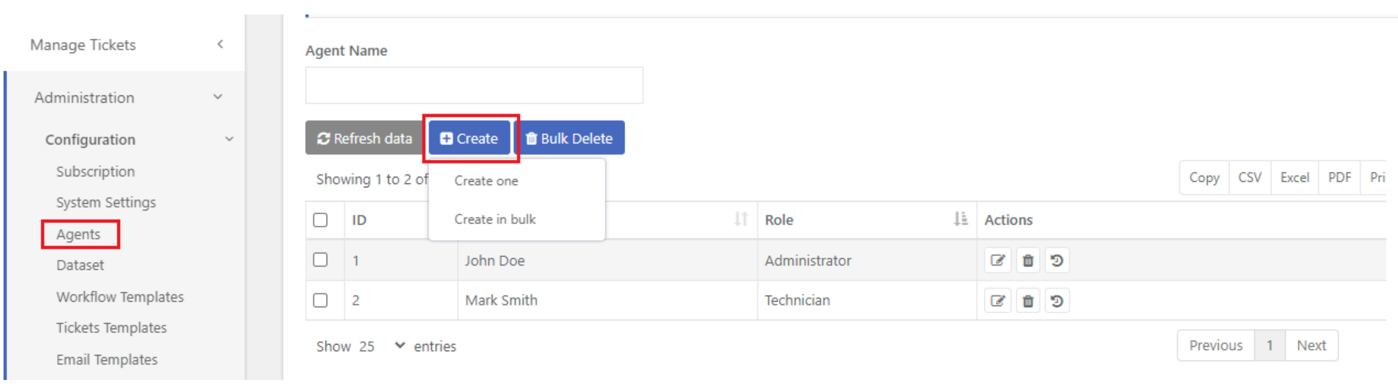
Tickets from email messages can be created in two ways:

- From the list view (Inbox->Pending Review) by using checkboxes (allows to create more than 1 ticket at once)
- From the email details view which displays also the email message



Adding agents to the system

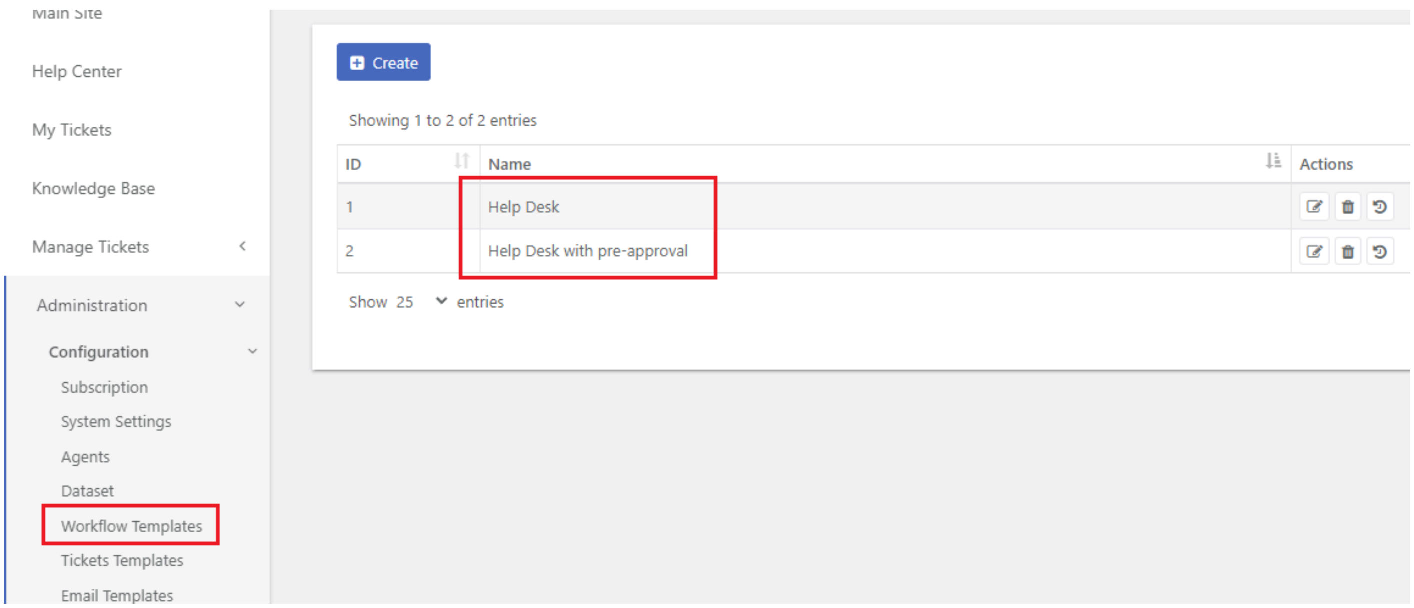
You can add agents under Administration->Configuration->Agents. Agents can be added in two ways: by using single mode (“Create one”) or by bulk creation (option “Create in Bulk”).

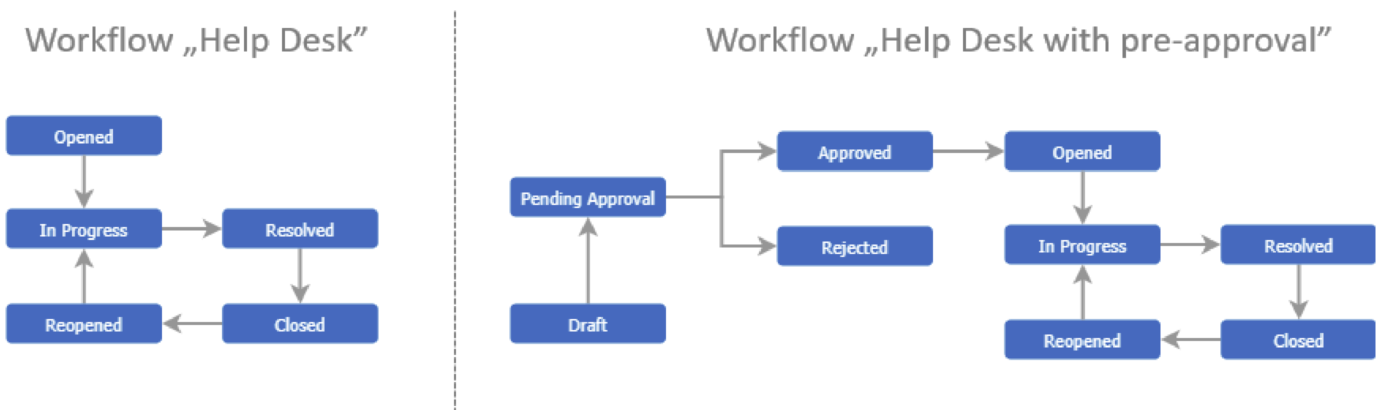


What is also worth mentioning, to see tickets from assigned templates under the "Ticket Management" sections, technicians and admins must also be assigned to the ticket template under Administration->Configuration->Ticket Templates->Edit->field "Agents".

Customizing workflow template(s)

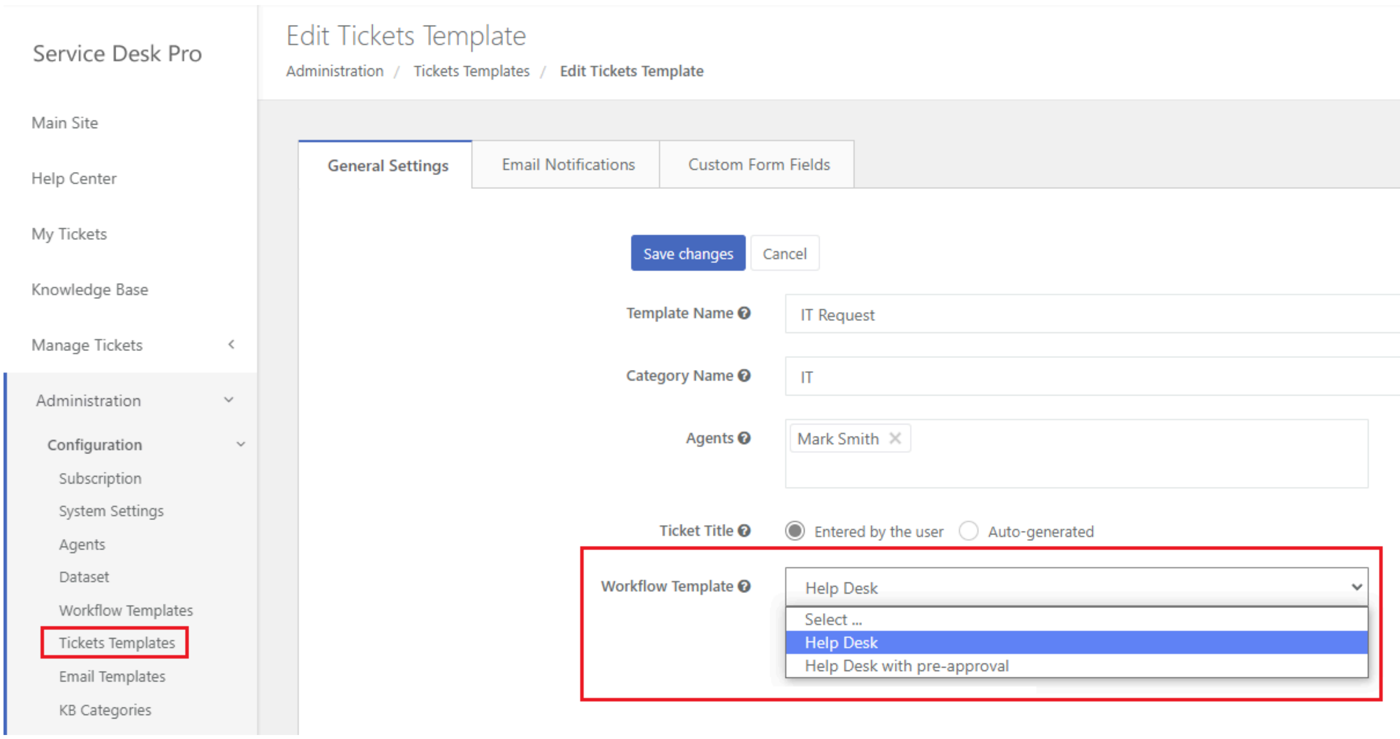
Service Desk Pro contains two predefined workflow templates that can be adjusted to your needs. You can customize the workflow template under Administration->Configuration->Workflow Templates by clicking on the edit icon on the existing workflow or clicking on the “Create” button to create a new workflow.





The workflow template is assigned to the ticket template (each ticket template might have a different workflow). You can change workflow to the ticket template under Administration->Configuration->Ticket Templates->edit.

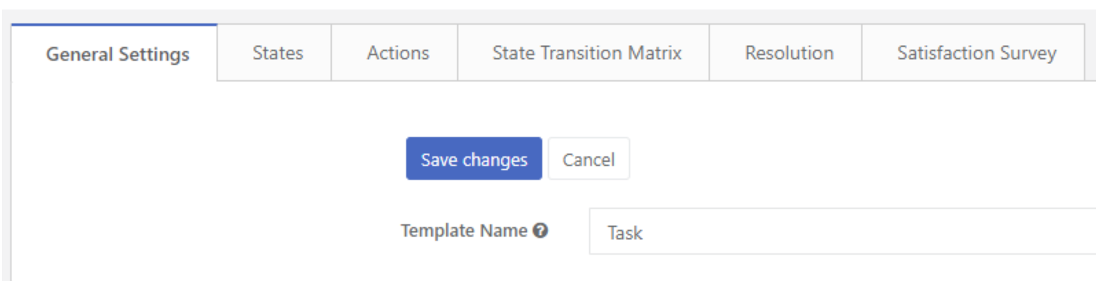
Usage of workflow with pre-approval is described in detail in the section “*Configuring the ticket pre-approval process*”



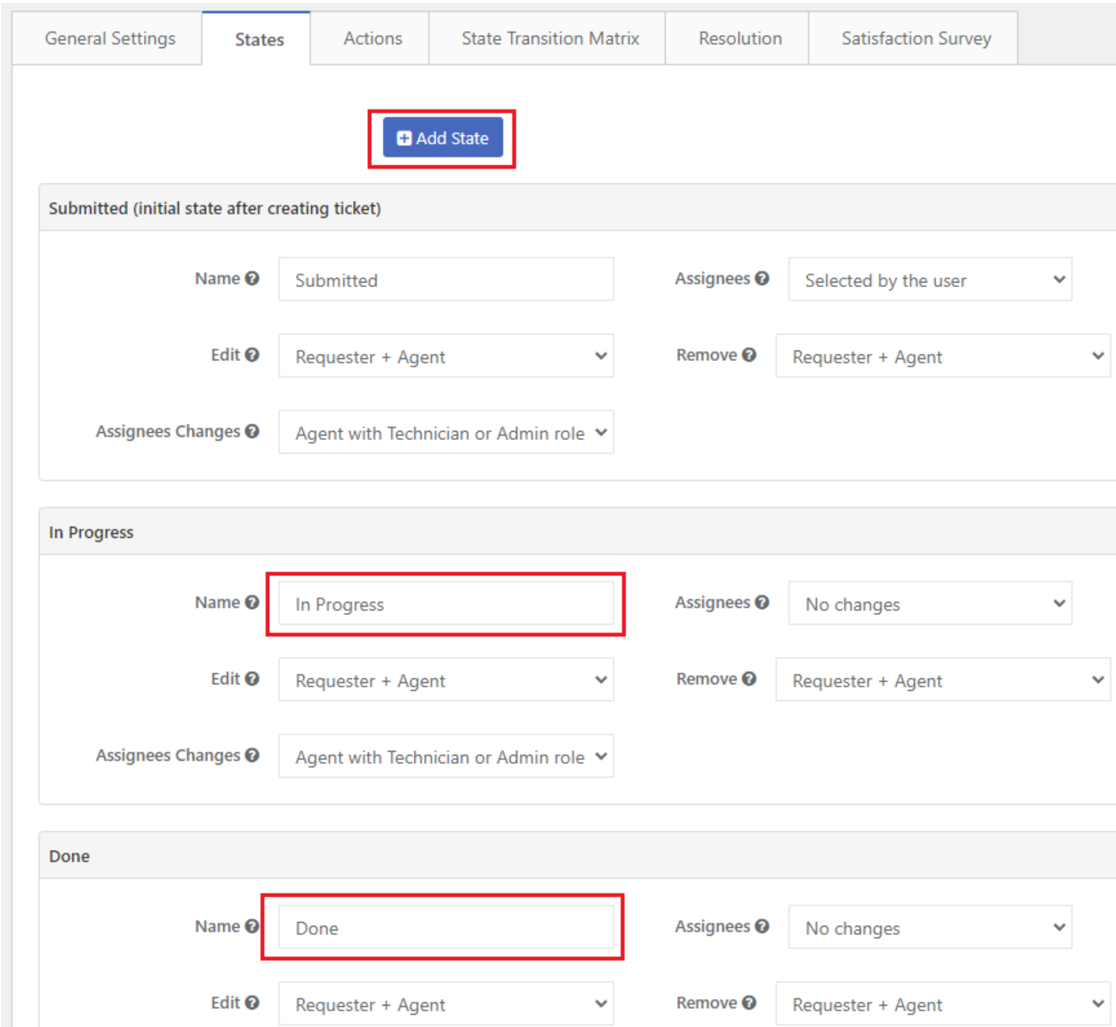
Creating new workflow

In this section, we will create a sample “Task” workflow to explain how to create custom workflows by using a workflow editor.

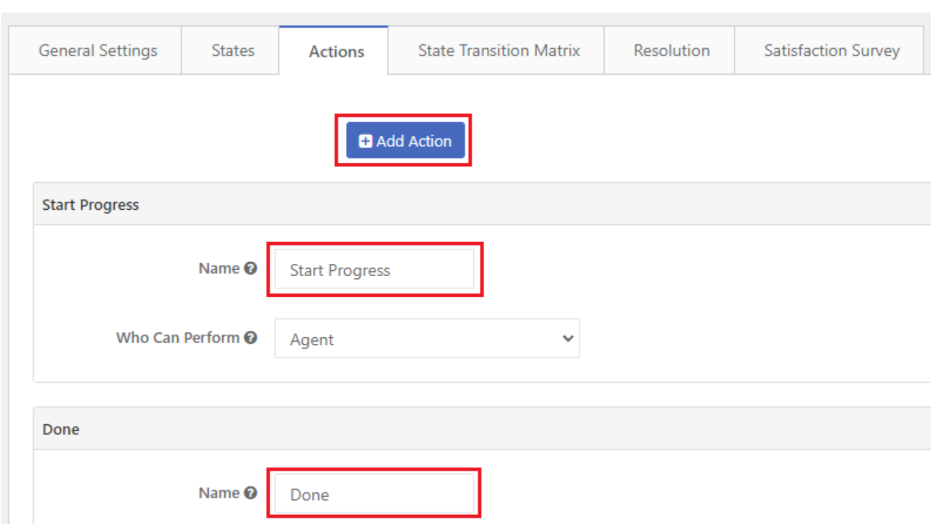
Step 1) Open view Administration->Configuration->Workflow Templates and click the button “Create”
Step 2) Enter workflow name in the tab “General Settings”, for example, “Task”



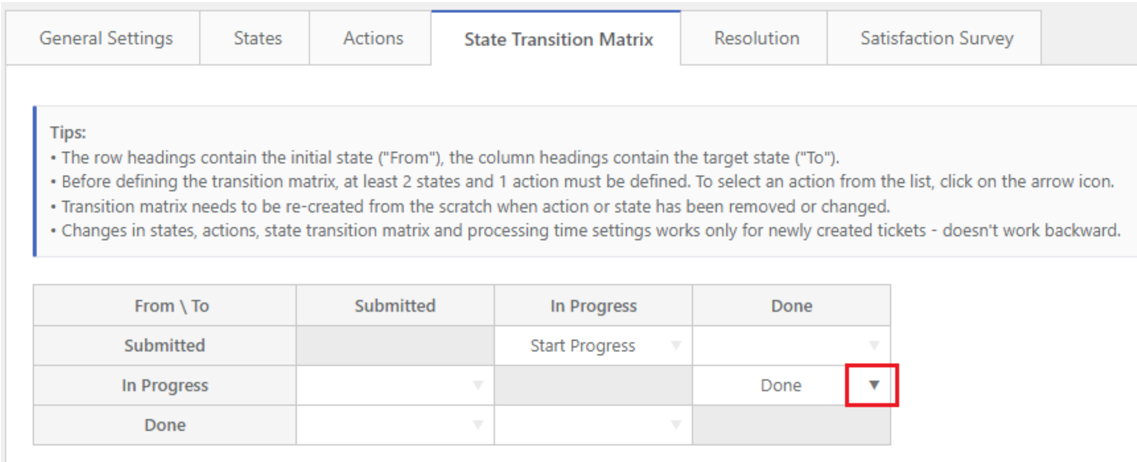
Step 3) Open tab “States” and click the button “Add State” to add two new states “In Progress” and “Done. Optionally you can adjust permissions and other settings for this state, e.g. who can edit in this state or who can change assignees.



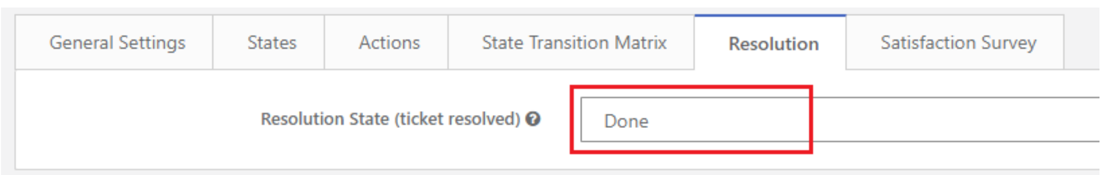
Step 4) Open the tab “Actions” and click the button “Add Action” to add two new actions “Start Progress” and “Done”



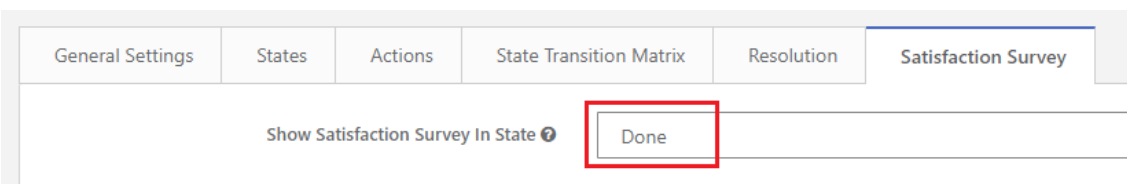
Step 5) Open the tab "State Transition Matix" and click on the arrow icon to select an action(s) that transform workflow from one state to another, for example, action "Done" transforms from "In Progress" to Done".



Step 6) Select Resolution State (when a ticket is resolved)

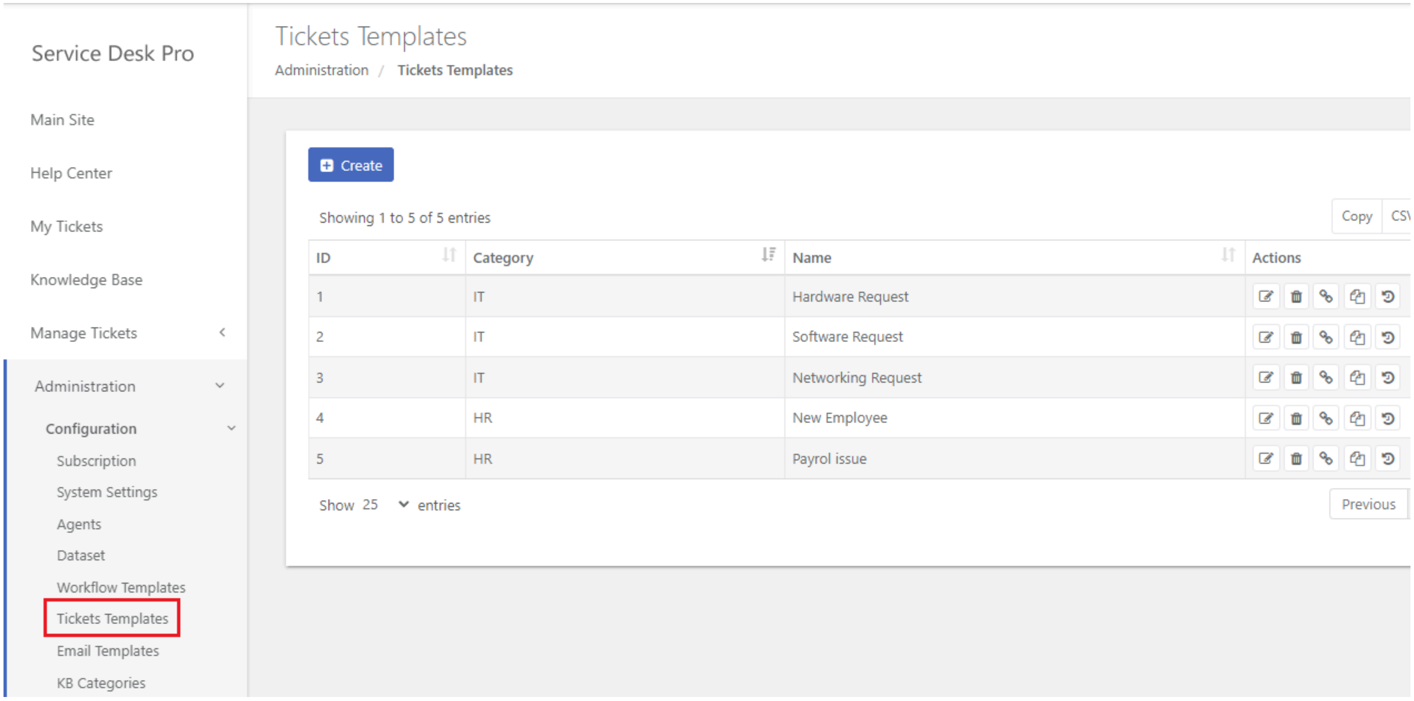


Step 7) (Optional) Select the state on which the satisfaction survey is displayed

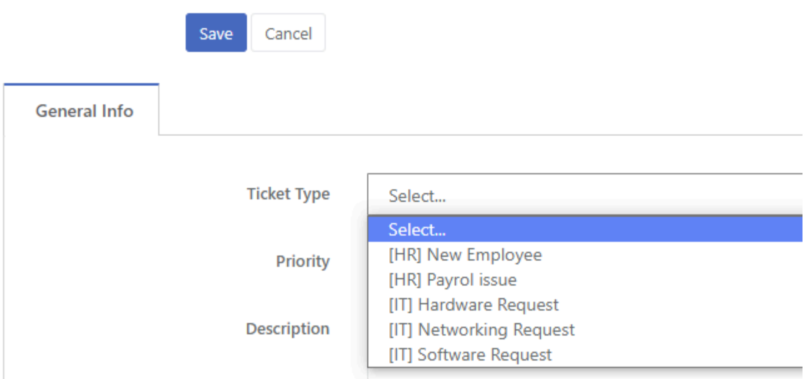


Creating ticket template(s)

The best way to organize tickets is by ticket type, which maps to the support team members who work on the ticket of that type, for example, IT Network Engineers work on network-related problems.
Ticket types can be defined under Administration->Configuration->Ticket Templates.



Ticket Templates are visible as “Ticket Type” on the ticket creation form. It is the first option on the ticket form, selecting Ticket Type adjusts the ticket form to the template settings, for example, specific custom fields, attachments, or other options.

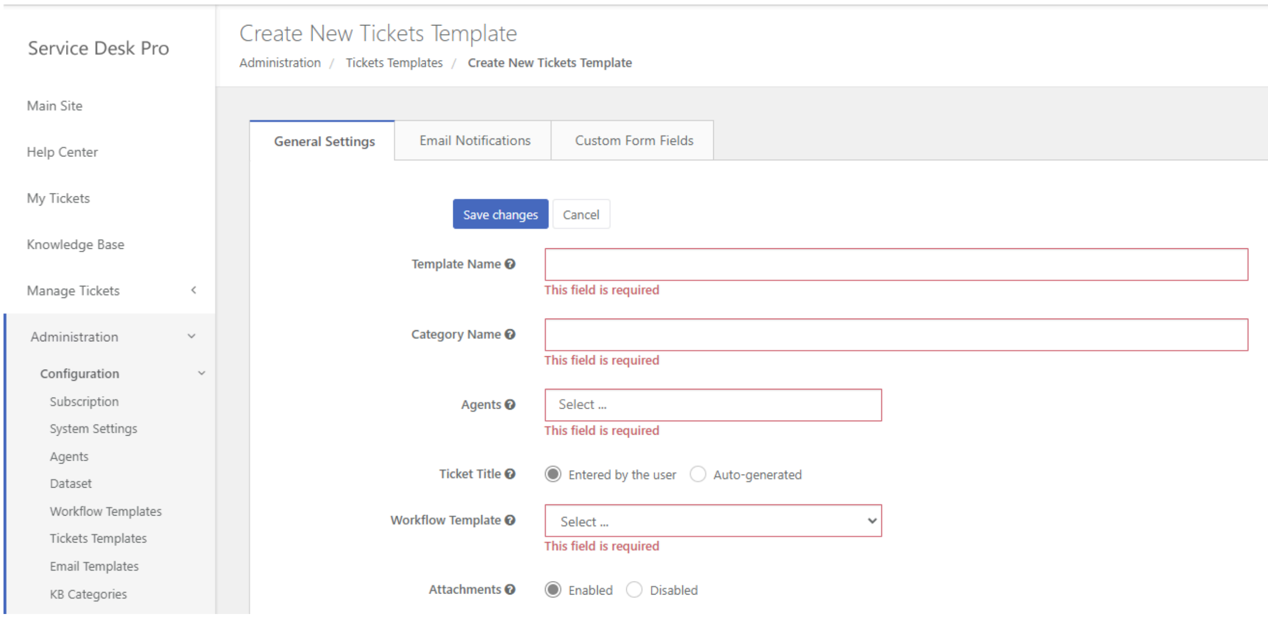


To create a new template, click the button “Create” under Administration->Configuration->Ticket Templates. There are the following steps to create a new ticket template”

Step 1) Configure the “General Settings” tab. There are 4 mandatory fields required to create a ticket template:

- Template Name, for example, “Network Request”
- Template Category, for example, “IT”
- Agents - agents who have access to tickets created from this template under the section “Manage Tickets” and work on the ticket of that type

- Workflow Template, workflow which will be used for this template (listed from Administration->Configuration->Workflow Templates).



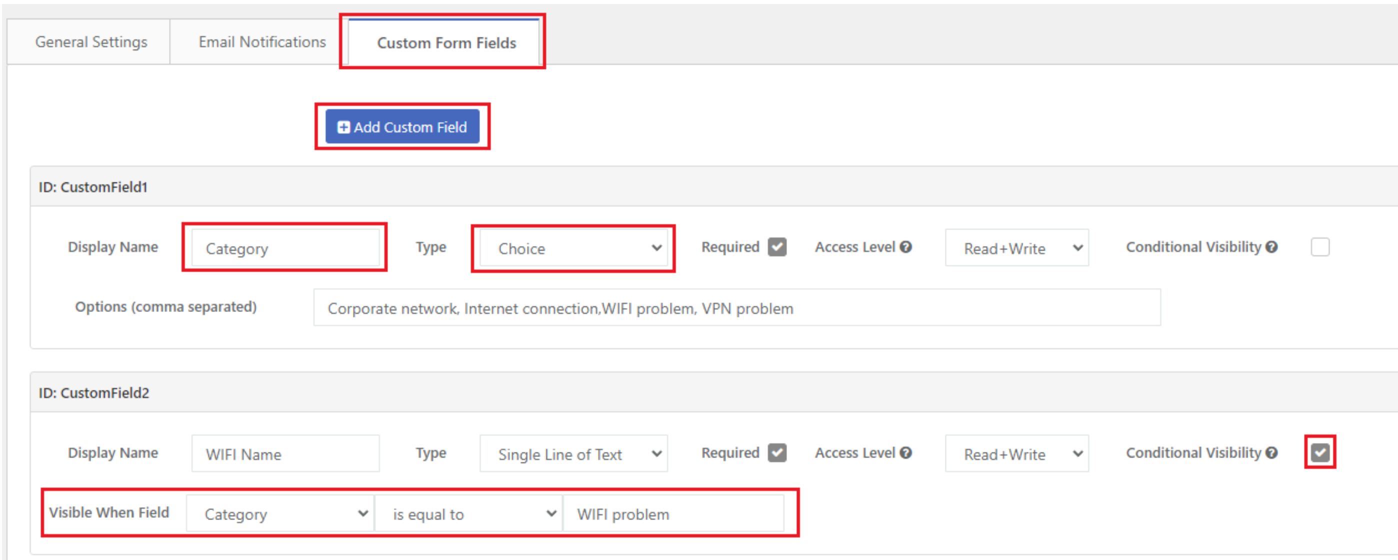
Step 2) (Optional) Configure the "Email Notification" tab - which is explained in a different section (Configuring the email notifications)

Step 3) (Optional) Configure tab "Custom Form Fields". Custom fields can be used to gather more information about the support issue.   To create a custom field you need to click on the button "Add Custom Field" and fill in "Display Name" and "Type.

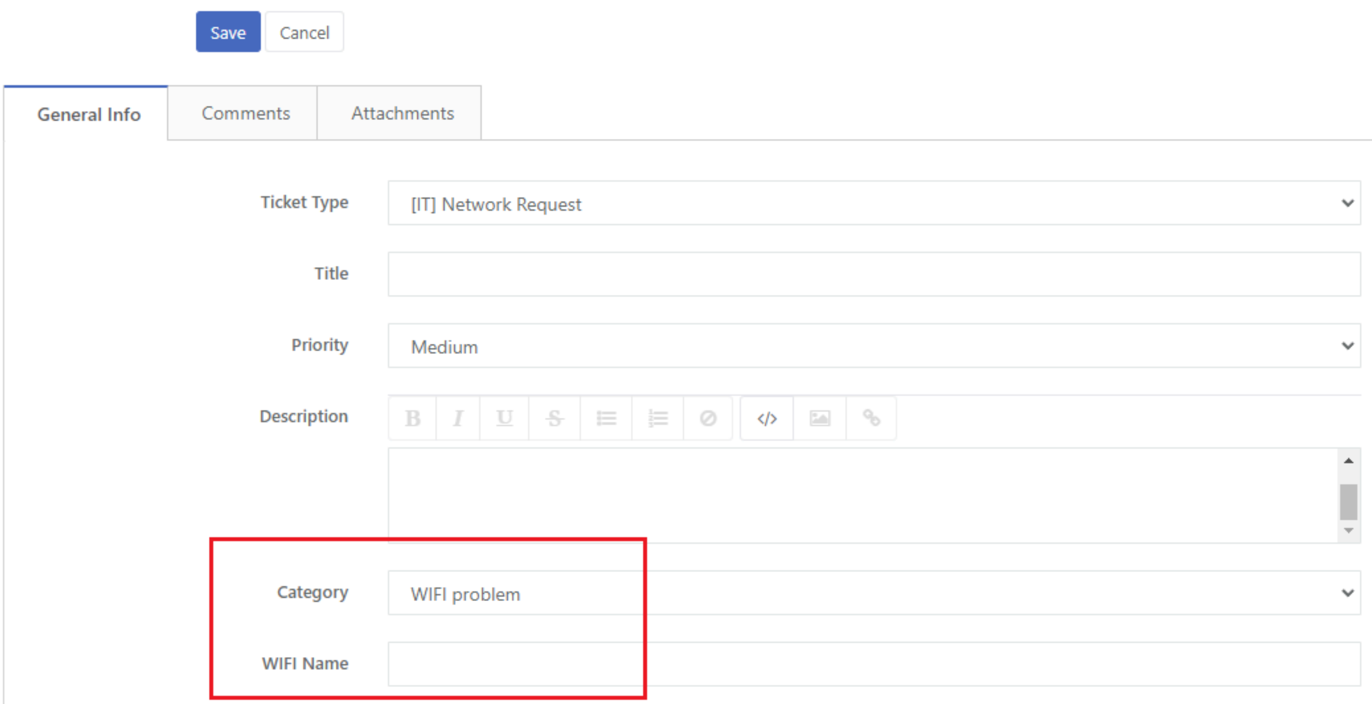
The app supports the following custom field types:

- Choice,
- Single Line of Text,
- Multiple Line of Text,
- Number,
- Boolean,
- Choice
- Multiple Choice,
- Choice from the External SharePoint List,
- Dataset,
- Date.

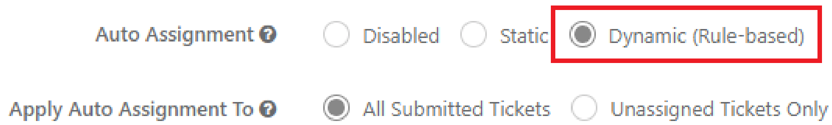
You can also specify whether the field is required (checkbox "Required"), set up whether the field is visible for regular users or only for agents (field "Access Level"), and set up conditional visibility based on different field values (checkbox "Conditional Visibility"). For example field, "WIFI Name" is visible only when the user selected "WIFI problem" in the field "Category".



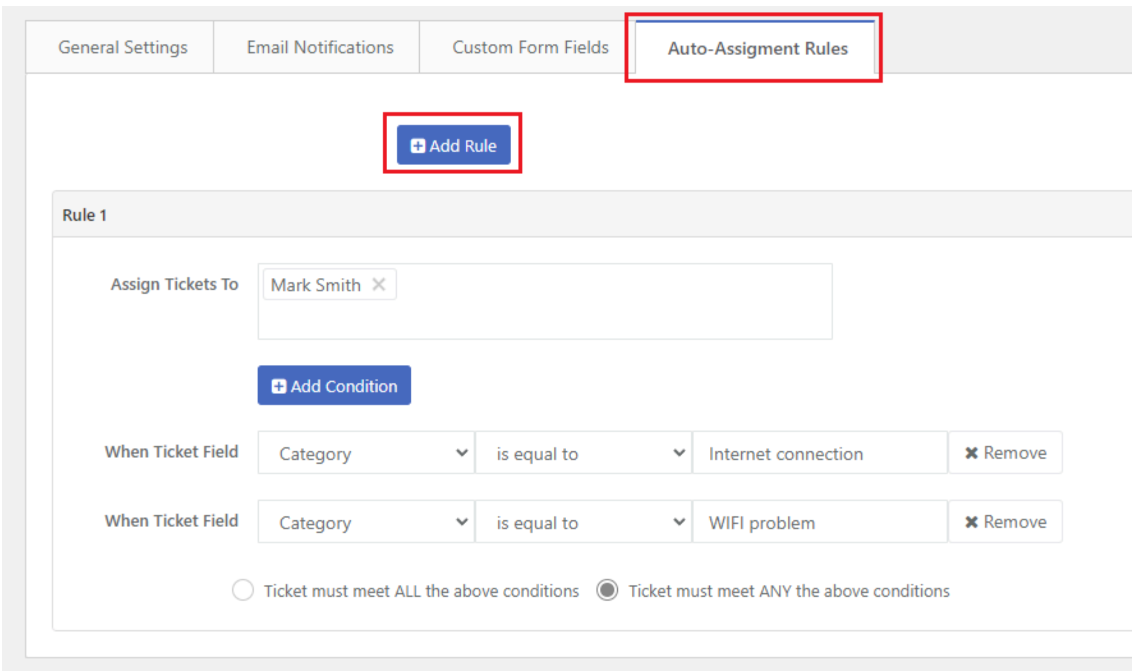
Custom fields are added to the ticket form, below built-in fields (Title, Priority, and Description).



Step 4) (Optional) Configure "Auto Assignment" rules. Under tab "General" you can optionally enable the "Auto-assigment" option that is used to automatically assign agent(s) for tickets created from this template.

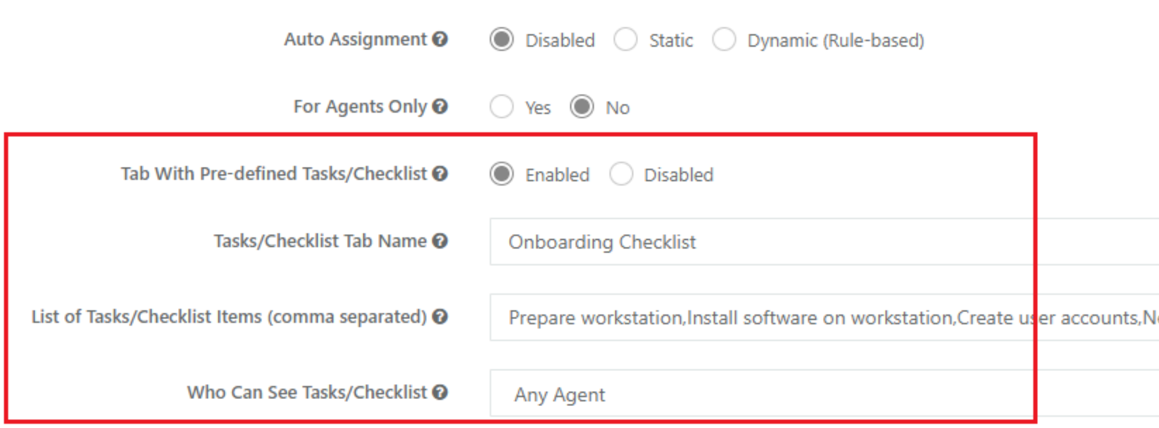


If you select the option “Dynamic (rule-based)” you will see a new tab “Auto-Assignment Rules” that allows automatic ticket assignment based on different criteria. To add new rules click on the button “Add Rule”.

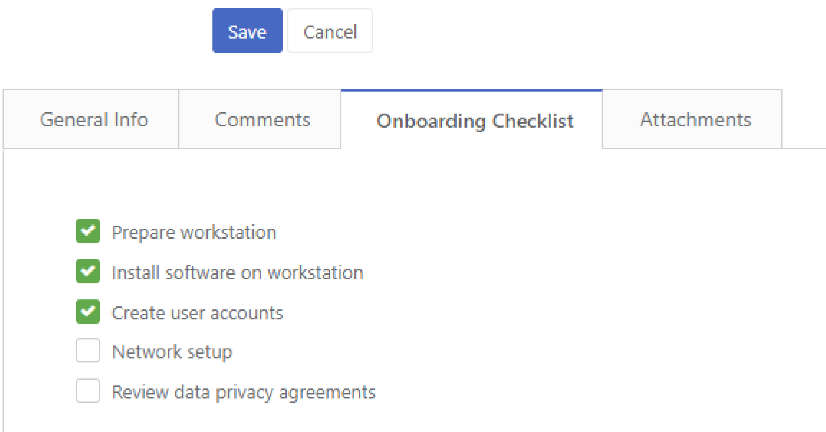


Step 5) (Optional) Configure additional checklist.

A checklist serves as a tool used to ensure that necessary tasks, processes, and actions are carried out systematically. It outlines steps to be followed, tasks to be completed, or items to be verified, serving as a roadmap to manage and maintain various aspects of an organization's infrastructure.
Option “*Tab with Pre-defined Tasks/Checklists*” allows creating an additional tab on the request form with lists of predefined tasks, for example, “Onboarding checklist” for request templates like “IT Onboarding Request”

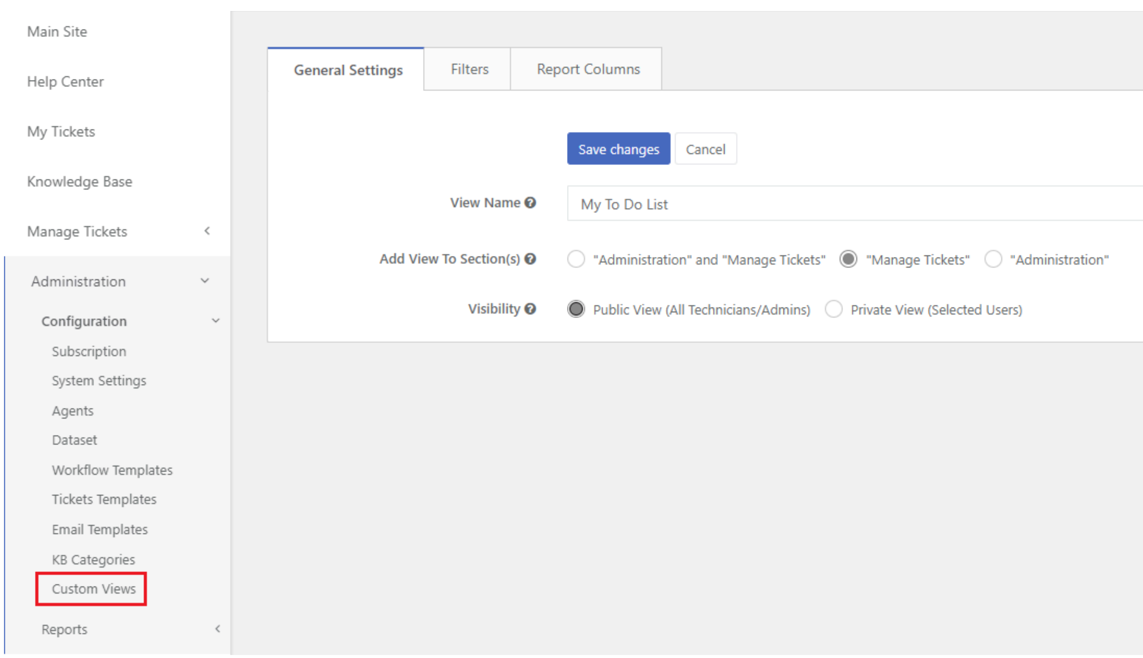


Comma comma-separated list of options can be entered in the field “*List of Tasks/Checklist Items (comma separated)*”. Setting “*Who Can See Tasks/Checklist*” allows for restricting the visibility of this tab, for example only to agents.
The below illustration shows how a sample task/checklist looks on the ticket form. By default, all checklist items are unchecked, an agent can mark the specific item as completed.

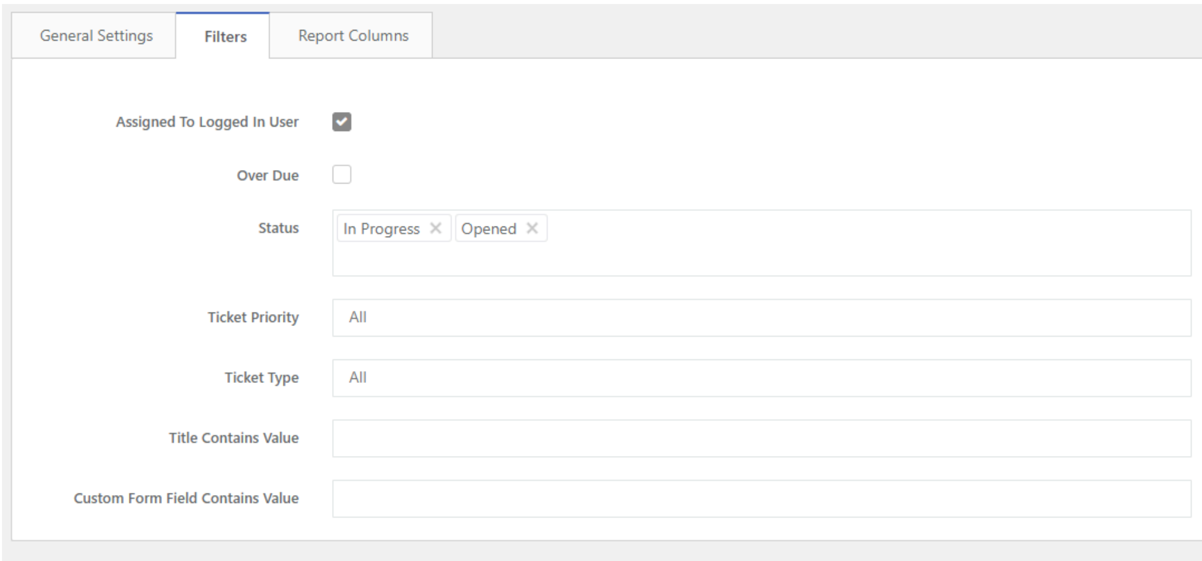


Creating custom views

Under Administration->Configuration->Custom Views you can create custom views (reports) which are visible under the sections “Manage Tickets” or Administration->Reports (depends on the settings). The custom view can be “Public” (visible by each agent) or “Private” (visible only by selected agents).

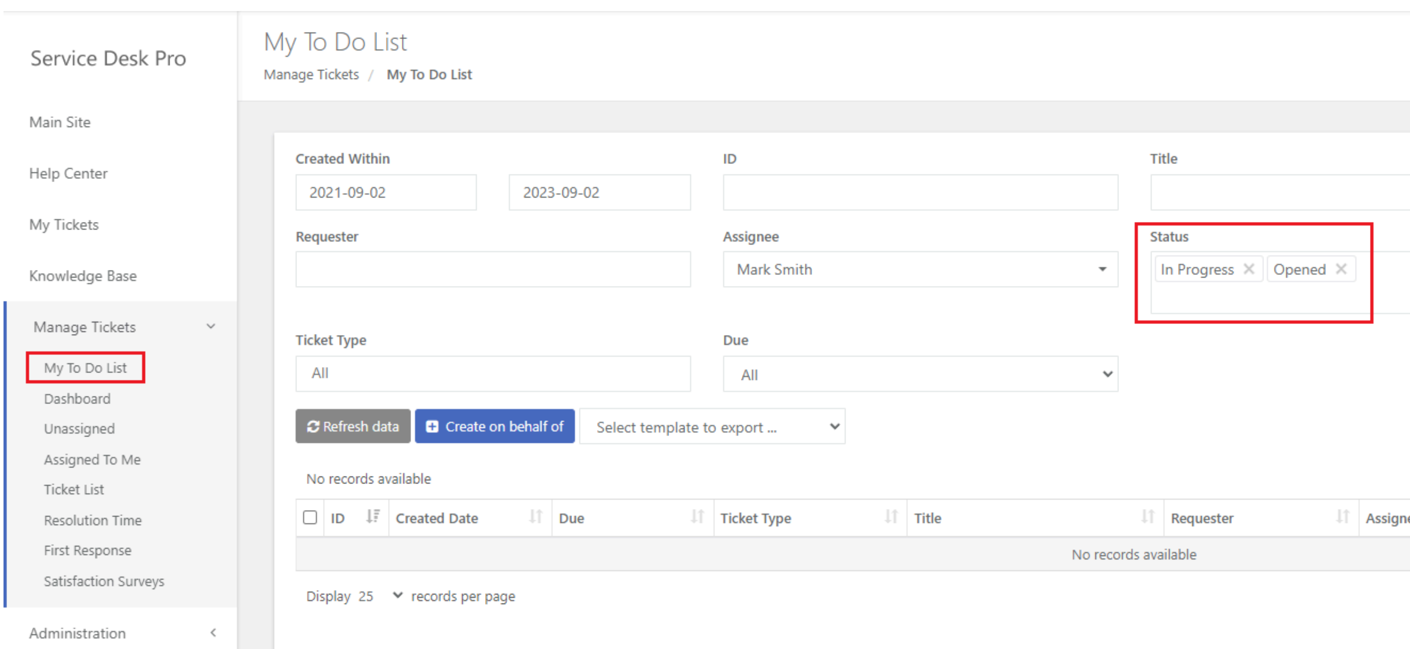


Under the tab “Filters” you can filter data for this view, for example, display tickets only in status “In Progress” and “Opened”.



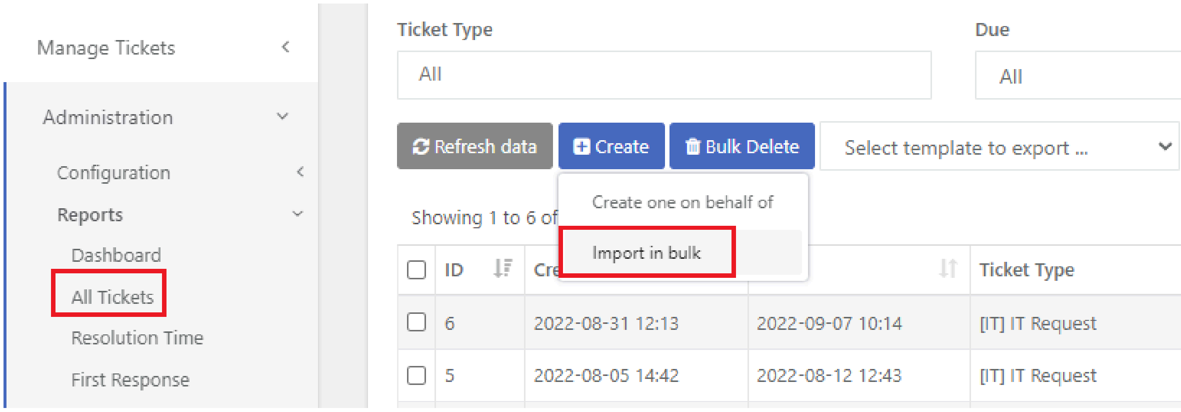
In the section “Report Columns” you can add or remove the columns displayed in this view.

After creation, the new view should be visible for selected agents under the proper section (Manage Requests or Administration->Reports, depending on settings). If you create filters in the custom view, you will see that the custom view applies proper filtering, for example, filter “Status”.



Importing existing tickets from MS Excel spreadsheet

To import tickets in bulk, you need to open view Administration->Reports->All Tickets, click the button “Create” and use the option “Import in bulk”.

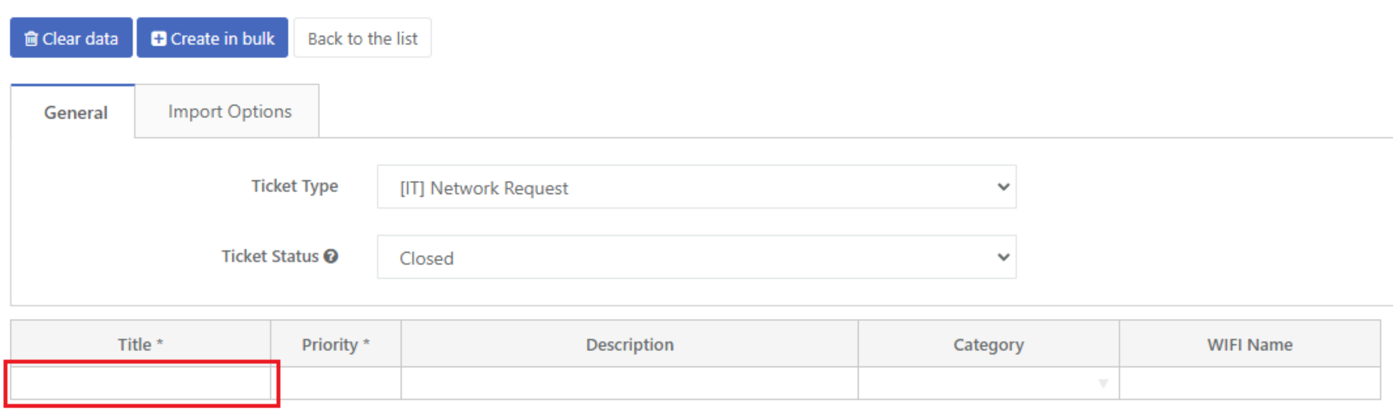


There are two tabs on the import page:

- General - that allows selecting “Ticket Type” - import form is adjusted to the template field schema (Administration->Configuration->Ticket Template->edit->tab “Custom form fields”)
- “Import Options” - allows to set up additional import options, for example, whether import “Requester” or “Assignee” fields

Below are steps to import tickets from an MS Excel spreadsheet:
Step 1) Open the MS Excel file and select records to copy. The selected column range must correspond to the ticket import page. For example, if the ticket import page contains fields Title, Priority, Description, and Category, you need to select the same columns in MS Excel. Use Ctrl+C to copy records. Due to performance optimization on the SharePoint platform, you can select (import) **max 200 tickets per single import operation** (there is no problem to select another 200 tickets and import them in the next step).

Step 2) Open the import page in the app, select the first cell in the spreadsheet and use Ctrl+V to paste tickets from the clipboard.



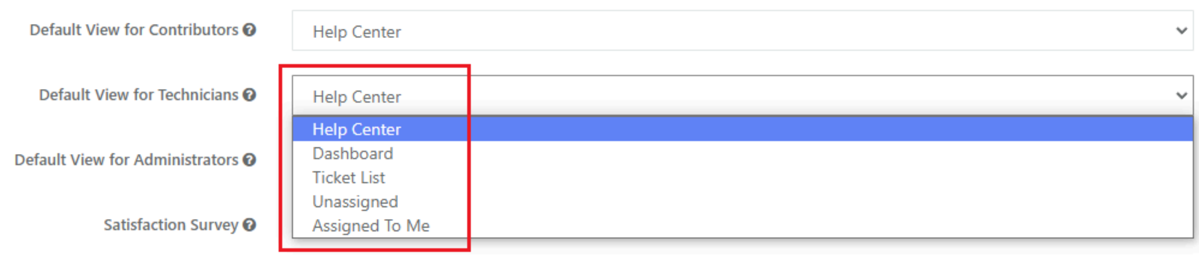
Step 3) Click the button “Create in bulk”.

Step 4) (Optional) If you want to import another package of 200 tickets, click the button “Clear Data” and copy and paste new tickets to the import page.

OPERATIONAL USAGE (AGENT’S GUIDE)

Reviewing tickets

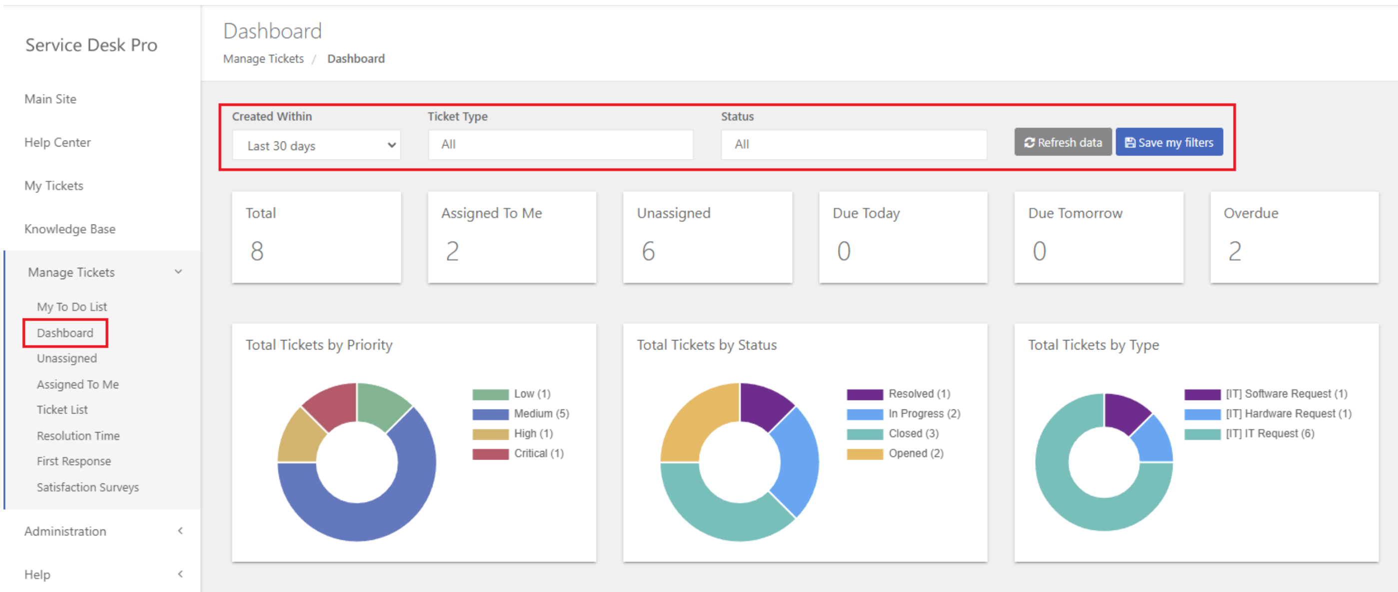
To optimize the ticket reviewing process, please open view Configuration->Configuration->System Settings->tab “General” and select default agent views that best meets agent needs.



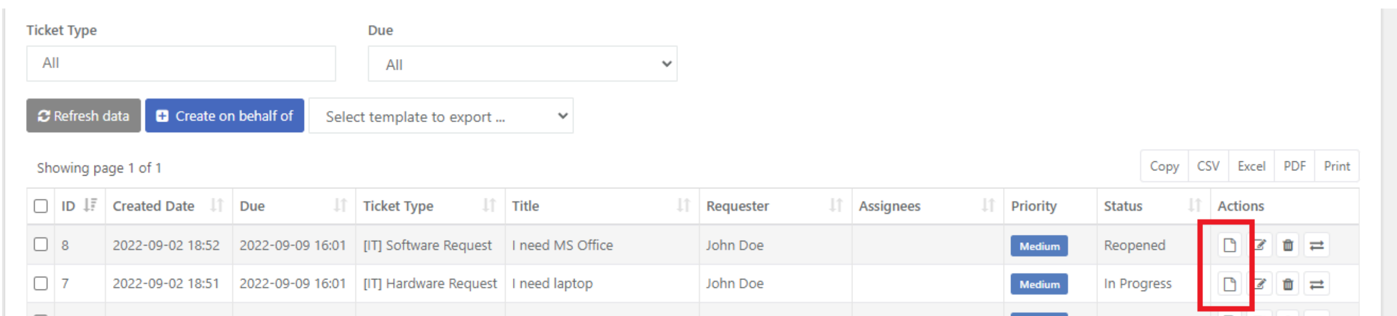
For example, for an agent with a “Technical” role there are 5 options to select:

- Help Center (the same view as for regular users)
- Dashboard - allows to quickly view all important metrics (e.g. number of unassigned tickets)
- Ticket List - displays all tickets from assigned templates
- Unassigned - displays all unassigned tickets (field “Assignee” is empty) from assigned templates
- Assigned to Me - display tickets assigned to the current user

The dashboard can be personalized by the user by selecting filters (Created Within, Ticket Type, and Status) and clicking on “Save my filters” (filters are saved only for the logged user, not for everyone).



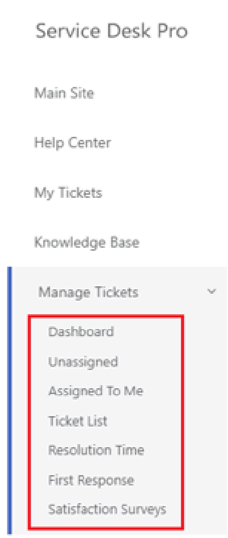
To open ticket details, an agent can click on the details icon in the data table view.



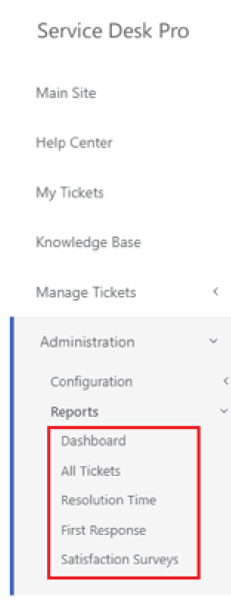
Built-in ticket reports

Tickets reports are displayed in two sections:

- **Section "Ticket Management"** is designed for the operational work of agents in the context of assigned ticket templates (e.g. IT Network Support Engineer can work only on network-related tickets). To see tickets from assigned templates under the "Ticket Management" sections, technicians and admins must also be assigned to the ticket template under Administration->Configuration->Ticket Templates->Edit->field "Agents".
- **Section Administration->Reports,** available only for agents with an admin role, display data from all tickets (no matter whether the admin is assigned to a template or not).



Section „Manage Tickets”
(tickets from assigned templates)



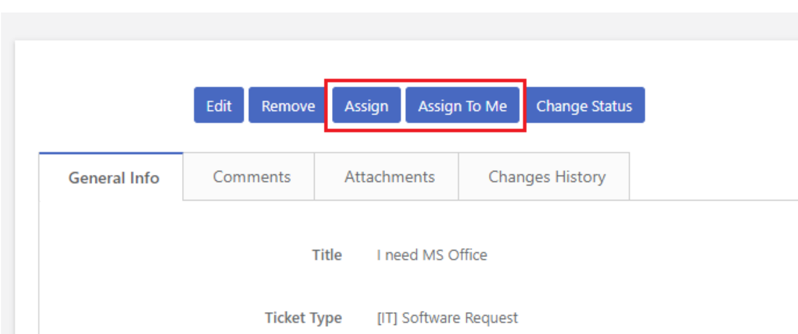
Section„Administration->Report”
(all tickets)

Section	**Report**	**Description**
Manage Request (displays data from assigned templates only)	Dashboard	Visual analytics dashboard which displays aggregated metrics (Total Tickets, Assigned To Me, Unassigned, Due Today, Due Tomorrow, Overdue, Total Tickets by Priority, Total Tickets by Status, Total Tickets by Type)
	Unassigned	Displays tickets with empty field “Assignee”
	Assigned To Me	Displays tickets assigned to the logged user
	Ticket List	Displays all tickets (from assigned templates)
	Resolution Time	Displays two metrics that can be grouped or filtered by specific criteria: **Average Resolution Time** - average work time spent on the ticket, measured from ticket assignment to ticket resolution. Ticket resolution state is configurable under Administration-> Configuration-> Workflow Templates-> edit-> tab “Resolution”. In the default help desk workflow, it’s a “Resolved” state. **Resolution Time SLA %** - the percentage of tickets that meet the SLA criteria defined under Administration-> Configuration-> System Settings->tab “SLA”->column “Resolve within”.
	First Response	Displays two metrics that can be grouped or filtered by

		specific criteria: **Average First Response Time** - measured from ticket submission by the requester to the first response by the agent (status change or ticket assignment). **First Response SLA %** - the percentage of tickets that meet the SLA criteria defined under Administration-> Configuration-> System Settings->tab “SLA”->column “First response within”.
	Satisfaction Surveys	Displays average score of Satisfaction Surveys, and allows filtering and grouping by different criteria (e.g. assignee, ticket type etc).
Administration->Reports (displays data from all tickets)	Dashboard	The same report as under “Manage Request” but displays data from all tickets.
	All Tickets	Displays all tickets
	Resolution Time	The same report as under “Manage Request” but displays data from all tickets.
	First Response	The same report as under “Manage Request” but displays data from all tickets.
	Satisfaction Surveys	The same report as under “Manage Request” but displays data from all tickets.

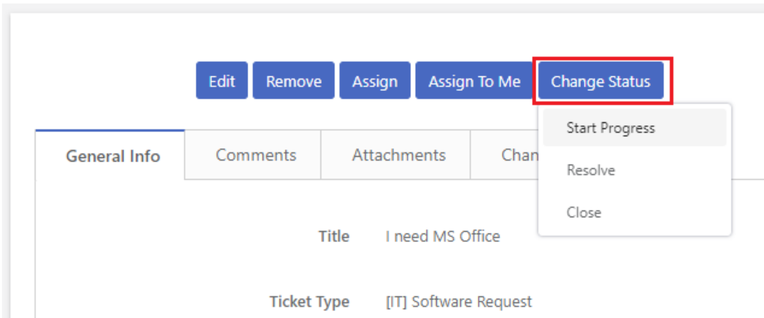
Assigning ticket to agent(s)

To assign the ticket to an agent, please open the ticket details page and use one of two buttons: Assign or Assign to Me (with pre-selected logged user).

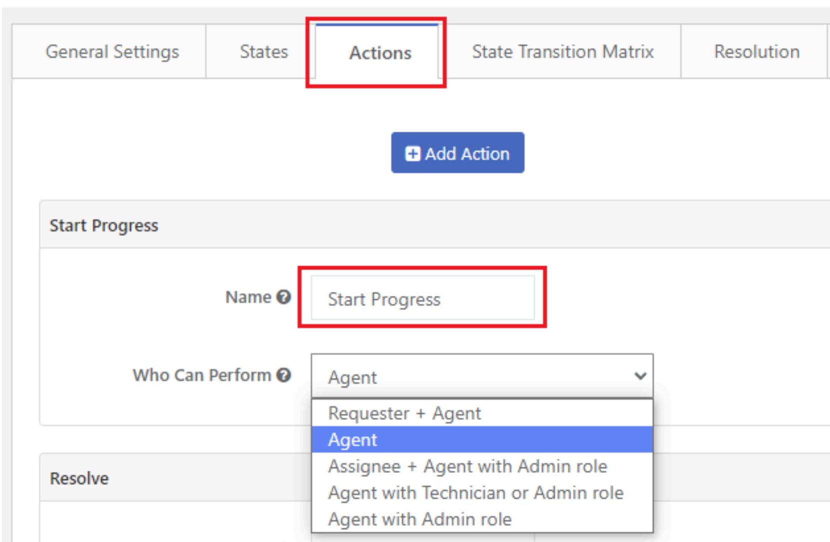


Changing ticket status

To change ticket status, please open the ticket details page and click on the button “Change Status”. The app displays a list of available workflow statuses depending on the current workflow status.



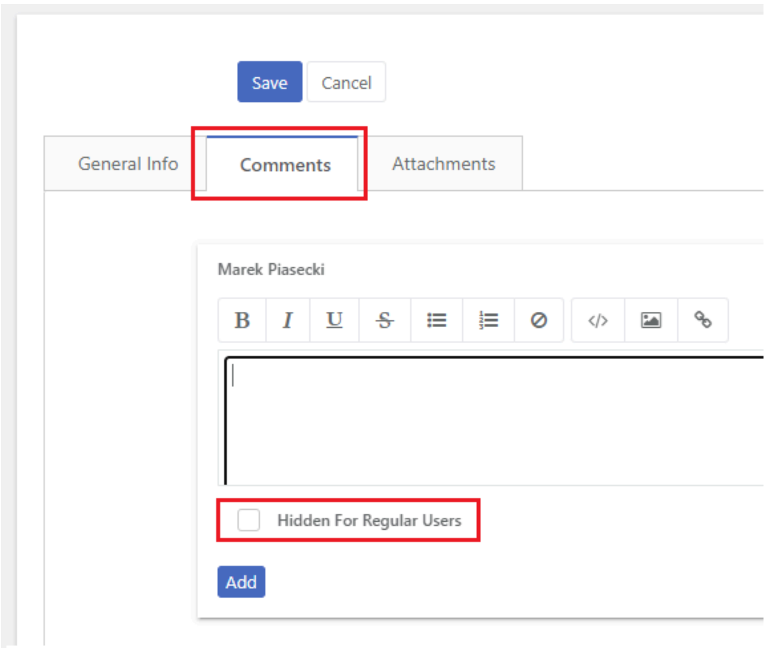
If some user doesn’t see the button “Change Status” or doesn’t see specific action (e.g. Start Progress”) please check workflow settings (Administration->Configuration->Workflow Templates->Edit), for example, who can perform a specific action.



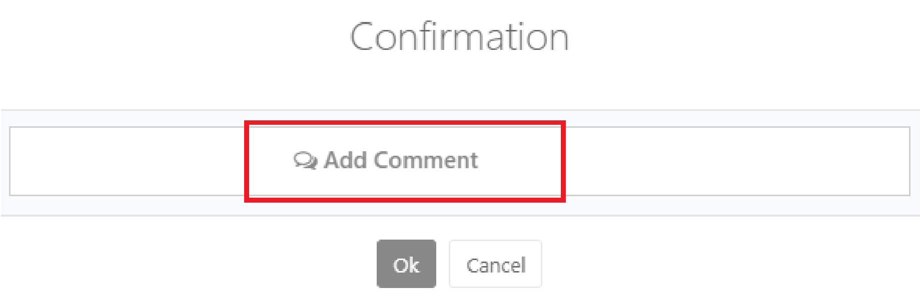
Adding comments

If “Comments” are enabled under ticket template settings, then both regular user and agent can add comments to the ticket. Comments can be added in two ways:

Option 1) Under “Comments” tab on the request create/view/edit forms. Agent can also add “private” comments by selecting the checkbox “Hidden for regular users”.

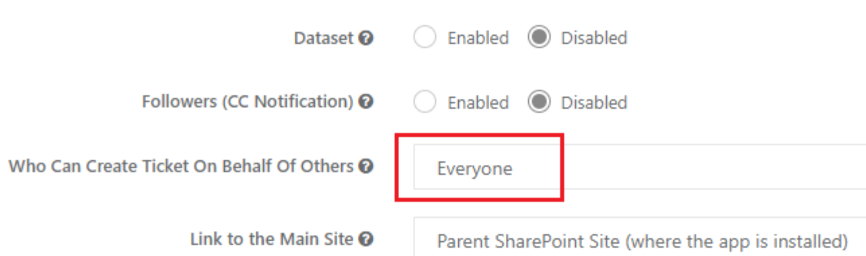


Option 2) On the ticket status change by expanding the “Add Comment” section.

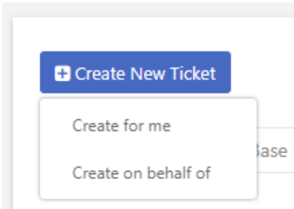


Creating tickets on behalf of others

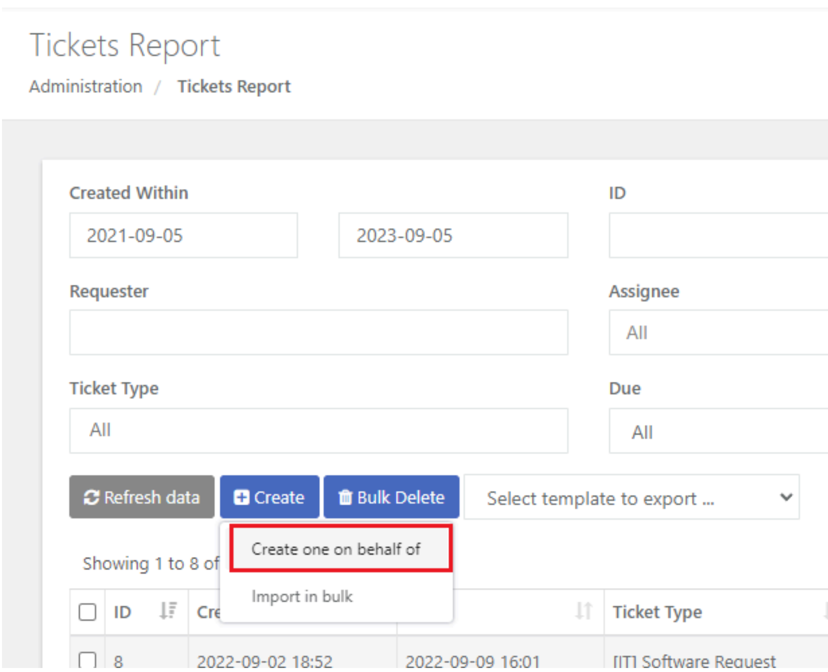
Regular users can create tickets on behalf of others if the setting “Who Can Create Ticket On Behalf Of Others” is set up to the value “Everyone” under Administration->Configuration->System Settings.



The user will see two options after clicking on the button “Create New Ticket”

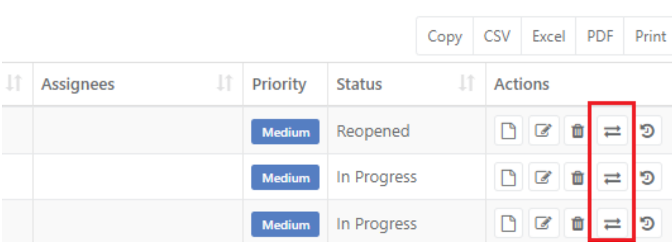


If creating requests on behalf of others is available only for agents, Agents can add tickets on behalf of users by clicking on the “Create” button and selecting the option “Create one on behalf of”. This option is available on reports under the “Manage Tickets” section or under Administration->Reports (admins only).

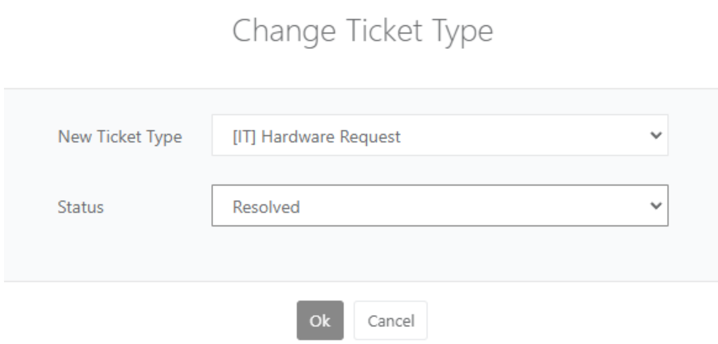


Changing ticket template for already submitted ticket

To change ticket type, please click on the “change” icon in the data table.



You will see popup windows that allow changing Ticket Type and Status.

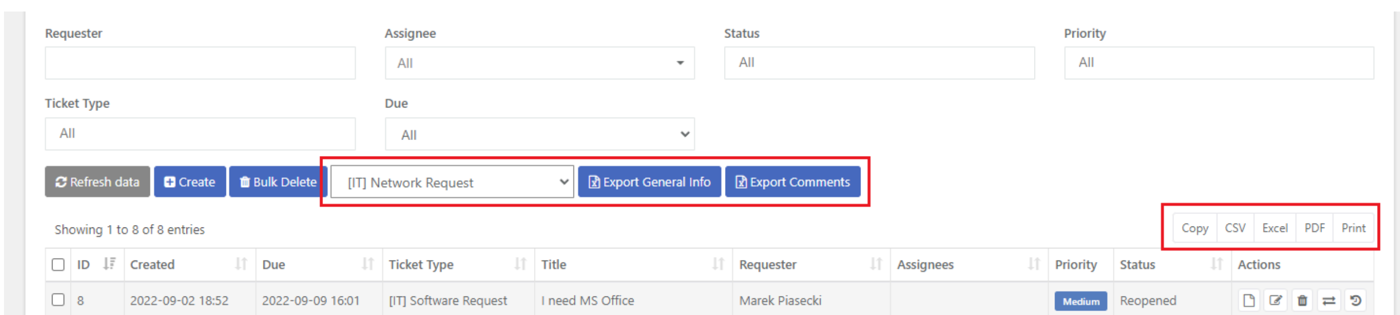


Export tickets to MS Excel

Tickets can be exported in two ways:

Option 1) By using buttons “Export General Info” or “Export Comments”, which are visible after selecting the ticket template. This is a **full ticket export,** including custom ticket fields.

Option 2) By using small export buttons above each data table. These buttons export **only columns listed in the data table**.

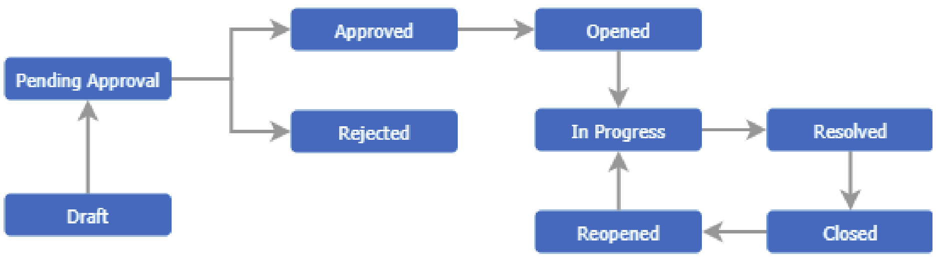


Configuring the ticket pre-approval process

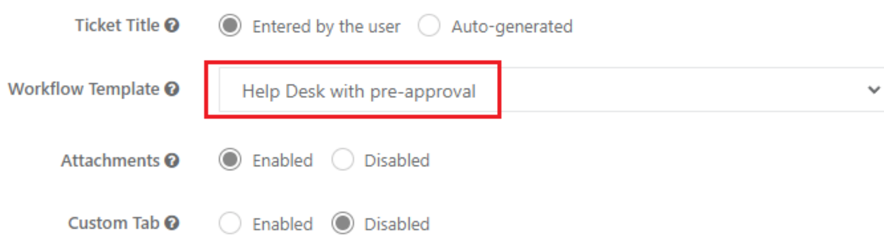
The pre-approval stage is an initial assessment or validation step before a help desk ticket is fully processed and acted upon by the support team. For example, access to a specific resource requested by a user must be pre-approved by the security manager.

Service Desk Pro contains one, built-in workflow template called “*Help Desk with pre-approval”* which can be used for this purpose.

Workflow „Help Desk with pre-approval”

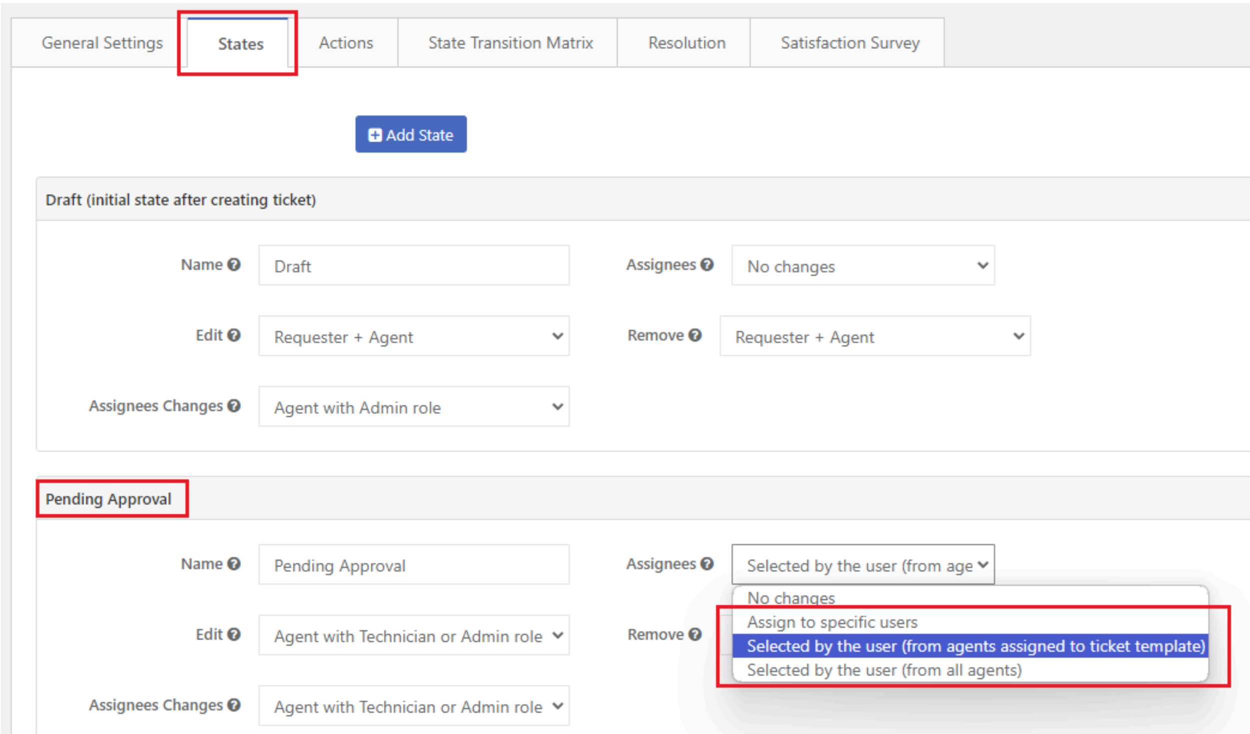


There are two configuration steps to enable this option:
Step 1) Open view Administration->Configuration->Ticket Templates, click the edit icon, switch setting “Workflow Template” to the value “Help Desk with pre-approval” and click the button save to confirm changes.



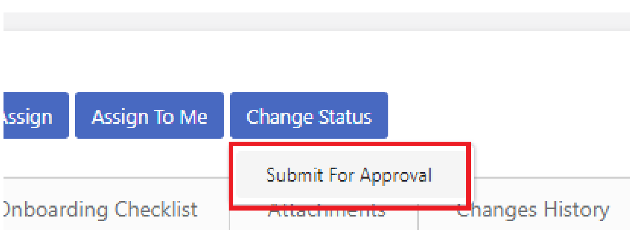
Step 2) Open view Administration->Configuration->Workflow Templates, click the edit icon for workflow “*Help Desk with pre-approval”,* open tab “States” and review option “Assigness” for status “Pending Approval” which determines how the approver is assigned. Three options are possible:

- **Assign to specific users** - approver is selected by the admin under workflow template
- **Selected by the user (from agents assigned to ticket template)** - when the user clicks on the button Change Status->Submit for approval, the app displays a user popup with a list of users to select, only agents assigned to this template can be selected (Administration->Configuration->Ticket Templates->edit->field “Agents)
- **Selected by the user (from all agents)** - the same option as above, but a list of users to select is pulled from all agents registered in the app under Administration->Configuration->Agents

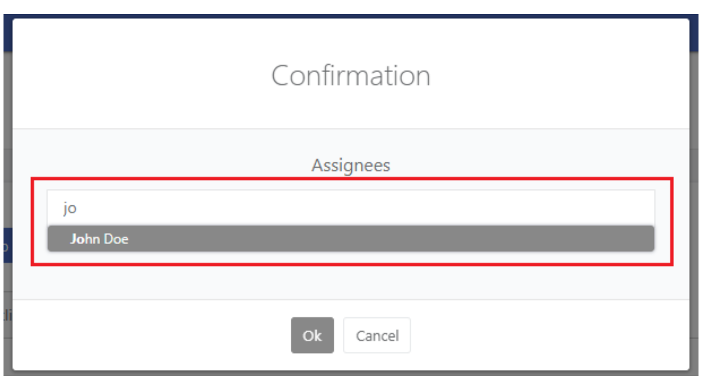


The approval process works in the following way:

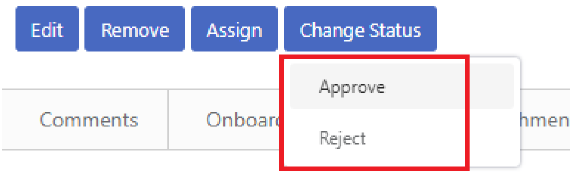
1) The Requester or Agent submits the ticket for approval by clicking *Change Status->Submit For Approval*



2) If the option “Assignee” for “Pending Approval” status is selected to the value “**Selected by the user”** then the user needs to select “Assignee” (approver) on the popup window.



3) The approver is assigned to the ticket (field “Assignee”) and receives an email notification that the ticket is assigned to this user (assuming that email notifications are configured and enabled)
4) The approver clicks the button “Change Status” to approve or reject the request



5) After successful approval, the ticket goes to status “Approved”, the agent can click on the button “Change Status” to start working on this ticket.