

Service Desk Pro

User Guide

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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

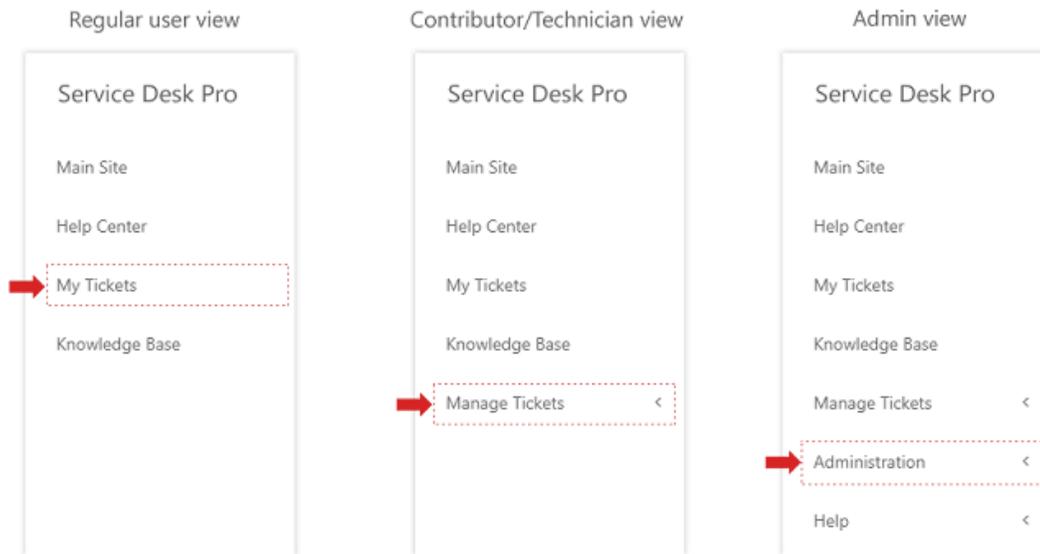
Service Desk Pro offers four predefined user roles:

- **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

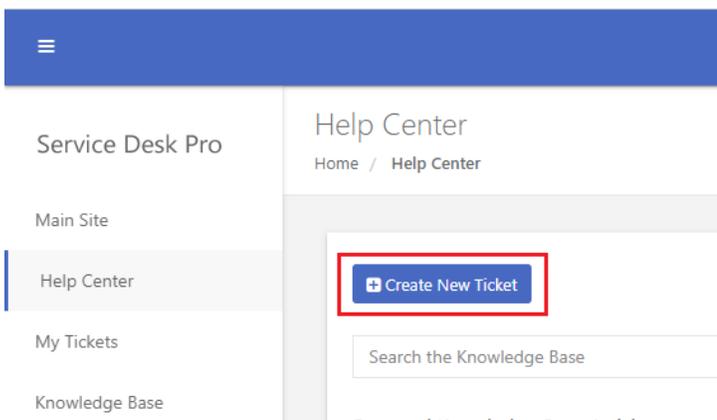
Here are minimal configuration steps to submit a test ticket (button "Create new ticket" on the main app page):

Step 1) Create at least 1 ticket template under Administration->Configuration->Ticket Templates:

- enter "Template Name" (mandatory field)
- enter "Category Name" (mandatory field)
- select user in "Agents" (mandatory field) - you can add your test account
- 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”.

The screenshot shows the 'System Settings' page in Service Desk Pro. The left sidebar contains navigation options: Service Desk Pro, Main Site, Help Center, My Tickets, Knowledge Base, Manage Tickets, Administration, Configuration, Subscription, System Settings (highlighted with a red box), Agents, Dataset, and Workflow Templates. The main content area is titled 'System Settings' and includes a breadcrumb 'Administration / System Settings'. Below this is a tabbed interface with 'General' selected (highlighted with a red box). Other tabs include Logo & Colors, Translations, SLA, Reports Columns, Email Notifications, Inbox, and Integrations. The 'General' tab contains a 'Save General Settings' button and several settings: 'Time Zone' (UTC-06:00 Guadalajara, Mexico City, Monterrey), 'Help Desk Hours' (Selected Operational Hours/Days), 'Help Desk Hours Start' (08:00), and 'Help Desk Hours End' (18:00).

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

Time zone is taken from SharePoint Site Regional Settings, can be adjusted under Site Contents->Site Settings->Regional settings.

Time Zone  (UTC-06:00) Guadalajara, Mexico City, Monterrey

Help Desk Hours  Selected Operational Hours/Days 24 Hours x 7 Days

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).

Help Desk Hours  Selected Operational Hours/Days 24 Hours x 7 Days

Help Desk Hours Start 

Help Desk Hours End 

Operational Days  Mon Tue Wed Thu Fri Sat Sun

Ticket's Due Date  Auto-calculated base on SLA threshold Manual selection Disabled

SLA thresholds 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 Thresholds".

General Logo & Colors Translations **SLA** Reports Columns Email Notifications

In this section, you can set up Service Level Agreement thresholds, which are used to calculate processing time metrics (as well as ticket's Due Date (in case of auto-calculated Due Date mode). For example, you can define that tickets with 'Cri 8 hours (Due Date = Created Date + 8h), otherwise resolution SLA won't be met.

[Save SLA Thresholds](#)

Service Level Agreement Thresholds

Click on a cell in the table to edit threshold. To save changes click button "Save SLA Settings".

| 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 |

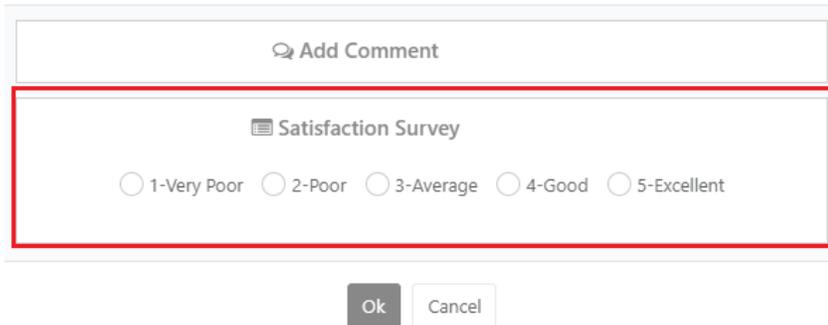
Example scenario:

- 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).

Confirmation



Confirmation dialog box showing a Satisfaction Survey with options: 1-Very Poor, 2-Poor, 3-Average, 4-Good, 5-Excellent. Buttons: Ok, Cancel.

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”.

Edit Workflow Template

Administration / Workflow Templates / Edit Workflow Template



Edit Workflow Template interface showing the 'Satisfaction Survey' tab selected. The 'Show Satisfaction Survey In State' dropdown menu is set to 'Closed'.

The satisfaction survey report is available for agents under:

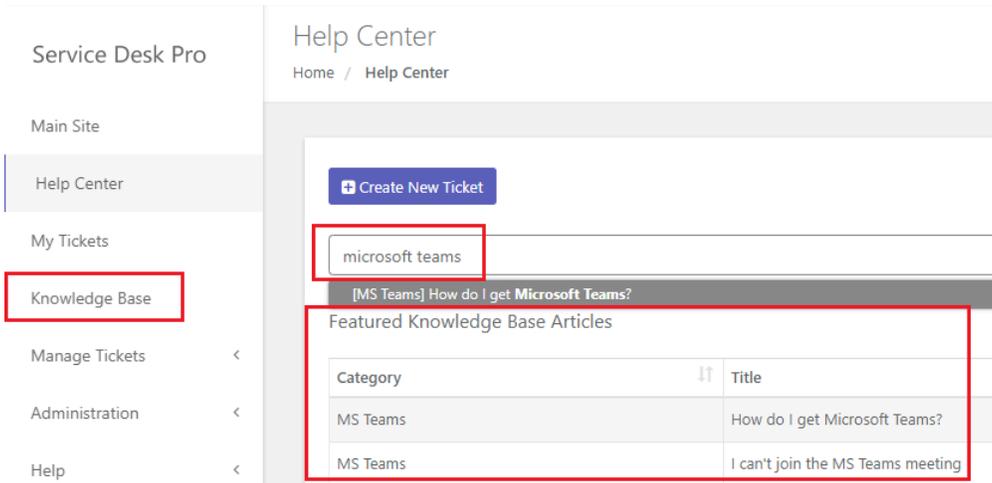
- 1) Manage Tickets->Satisfaction Surveys (display results from assigned ticket templates only)
- 2) Administration->Reports->Satisfaction Surveys (display results from all tickets)

To get more info about reports please read section [“Built-in ticket reports”](#).

Knowledge base

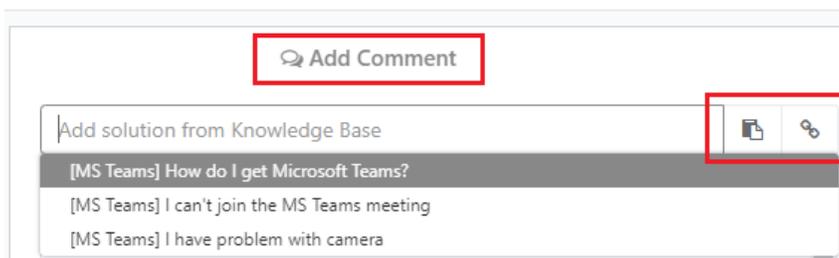
When the option “Knowledge Base” is enabled under the tab “General Settings”, the app displays Knowledge Base for users. A knowledge base helps employees find the information they need quickly and efficiently. Knowledge base articles can be found by using three ways:

- 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.

Confirmation



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

Save Cancel

Title

Category

Tags

Hidden For Regular Users Yes No

Featured on Help Center Yes No

Description

H1 H2 H3 H4 H5 H6 P pre **B** *I* U ~~S~~ **≡** **≡** **C** **↺** **⊗**

≡ **≡** **≡** **≡** **≡** **</>** **📎** **🔗**

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**.

Followers (CC Notification) Enabled Disabled

Who Can Add Followers

Allow Followers To Add Comments Enabled Disabled

Users can add followers on the ticket creation form:

Followers (CC Notification)
Mark Smith (mark.smith@ivero.net)

or on the ticket details page:

[Edit](#) [Remove](#) [Assign](#) [Add Followers](#) [Assign To Me](#) [Change Status](#)

[Info](#) [Comments](#) [Attachments](#) [Changes History](#)

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.

Knowledge Base

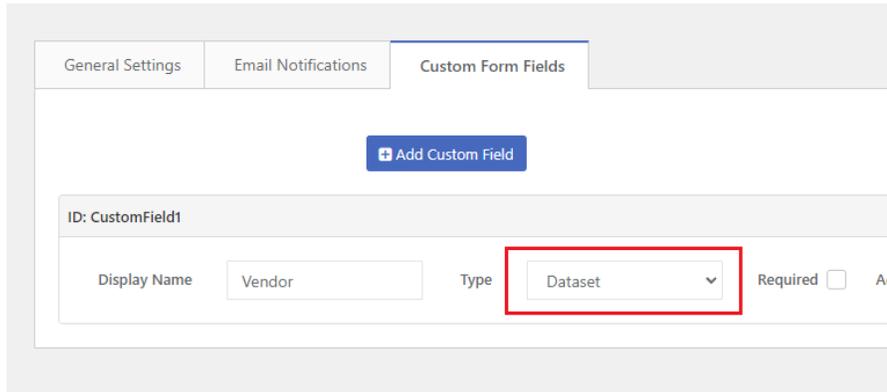
Manage Tickets <

- Administration
- Configuration
- Subscription
- System Settings
- Agents
- Dataset**
- Workflow Templates

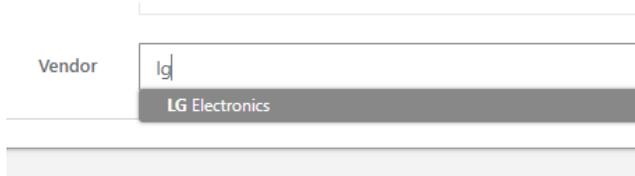
[Clear data](#) [Create in bulk](#) [Back to the list](#)

| Name * |
|----------------|
| Cisco |
| Lenovo |
| LG Electronics |
| HP |
| Panasonic |
| Intel |
| IBM |
| |

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”.



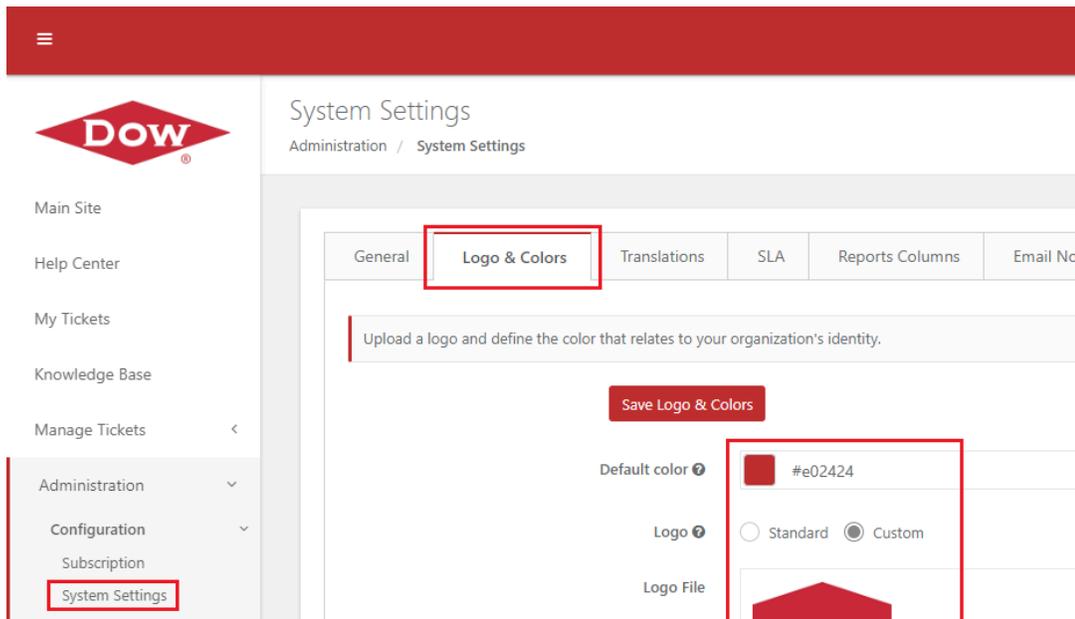
Dataset type is rendered as a drop-down list on the ticket creation/edit forms, with the ability to search by entered phrase



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".

General Logo & Colors **Translations** SLA Reports Columns Email Notifications Inbox Integrations

Language translation for regular user and technician views (except section "Administration").
Tip: use enter key to navigate to the next record. To save changes click "Save Translations".

[Save Translations](#)

| Original text | Translation |
|-----------------------|---|
| Back to the main site | <input type="text" value="My custom name"/> |
| Main Site | Main Site |
| Home | Home |
| Help Center | Help Center |

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.

General | Logo & Colors | Translations | SLA | **Reports Columns** | Email Notifications | Inbox | Integrations

Allows customizing columns on predefined ticket reports under the "Manage Tickets" and "Administration" sections. 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. Make sure that the option "Is Visible" is marked, otherwise, the column will be hidden.

Save Report Columns

| Is Visible | Column ID | Column Title |
|-------------------------------------|----------------|-----------------|
| <input checked="" type="checkbox"/> | Id | ID |
| <input checked="" type="checkbox"/> | Created | Created |
| <input checked="" type="checkbox"/> | Due | Due |
| <input checked="" type="checkbox"/> | TicketType | Ticket Type |
| <input checked="" type="checkbox"/> | Title | Title |
| <input checked="" type="checkbox"/> | RequesterName | Requester |
| <input checked="" type="checkbox"/> | AssigneesNames | Assignees |
| <input checked="" type="checkbox"/> | TicketPriority | Priority |
| <input checked="" type="checkbox"/> | Status | Status |
| <input type="checkbox"/> | ResolutionTime | Resolution Time |
| <input type="checkbox"/> | CustomField1 | My Custom Field |
| <input type="checkbox"/> | CustomField1 | |
| <input type="checkbox"/> | CustomField2 | |
| <input type="checkbox"/> | CustomField3 | |

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

General Settings | Email Notifications | **Custom Form Fields**

+ Add Custom Field

ID: CustomField1

Display Name: Vendor | Type: Dataset | Required:

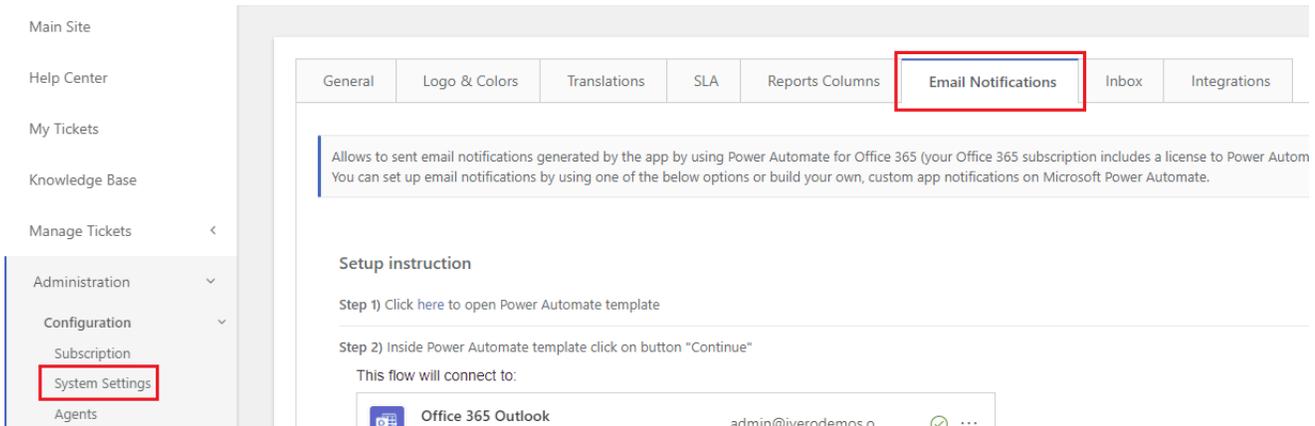


If you want to create a custom view (report) instead of modifying built-in reports please read the section "Creating custom views" to get more info.

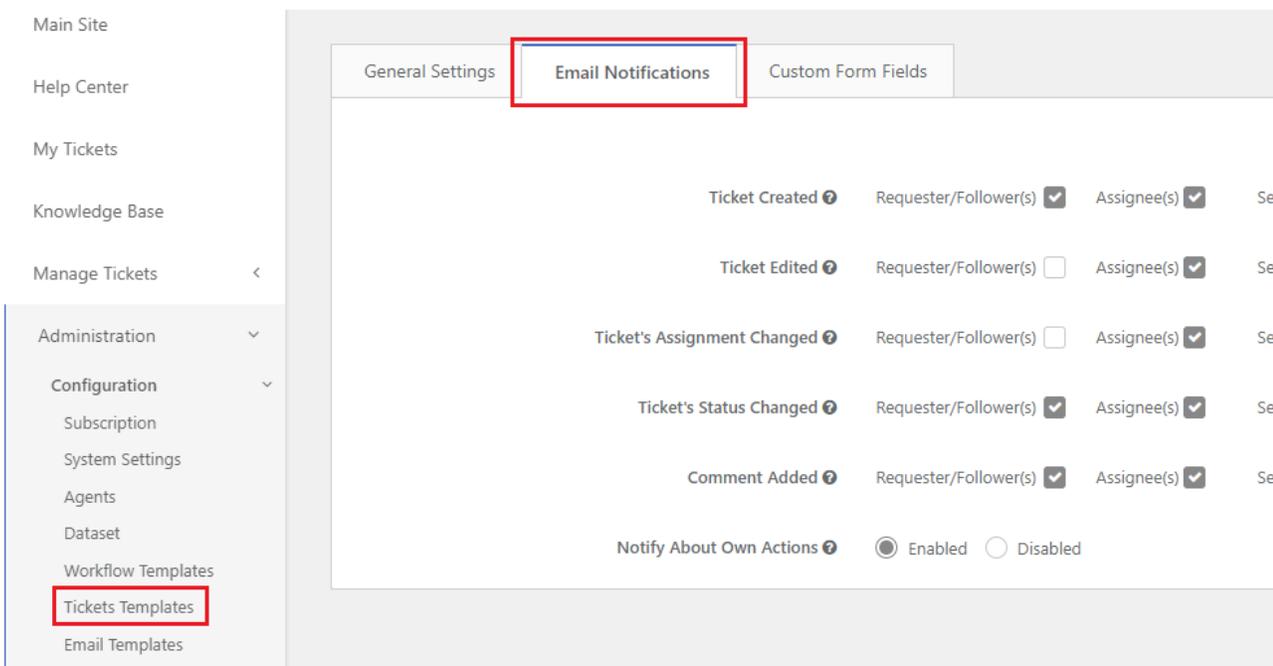
Configuring the email notifications

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.

Supported email variables:
 {ID}, {Title}, {Type}, {Status}, {Priority}, {Assignees}, {Editor},
 {Description}, {Link} and {CustomFieldX} - where X is custom
 field ID from Administration->Configuration->Ticket
 Templates->edit->tab 'Custom Form Fields' (for example
 CustomField1,CustomField2, etc.)

Message to Assignee(s) ?

H1 H2 H3 H4 H5 H6 P pre **B** *I* U ~~S~~

Dear User,

{Editor} created a new ticket.

Ticket Title: {Title}
 Ticket Type: {Type}

Link to the ticket:
 {Link}

This is an automatically generated email, please do not reply

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.

Service Desk Pro

System Settings
 Administration / System Settings

General Logo & Colors Translations SLA Reports Columns Email Notifications Inbox **Integrations**

When you enable the integration module, tickets are automatically exported to the native SharePoint list, enabling you to leverage the full potential of SharePoint. SharePoint list can be integrated with many systems by using Microsoft Power Automate, used as a data source for Power BI (reporting services) or displayed on different sites Part. Click here to get more info.

Create Integration List

List Name SDPIntegration

List Is Hidden ?

Standard Fields To Export ?

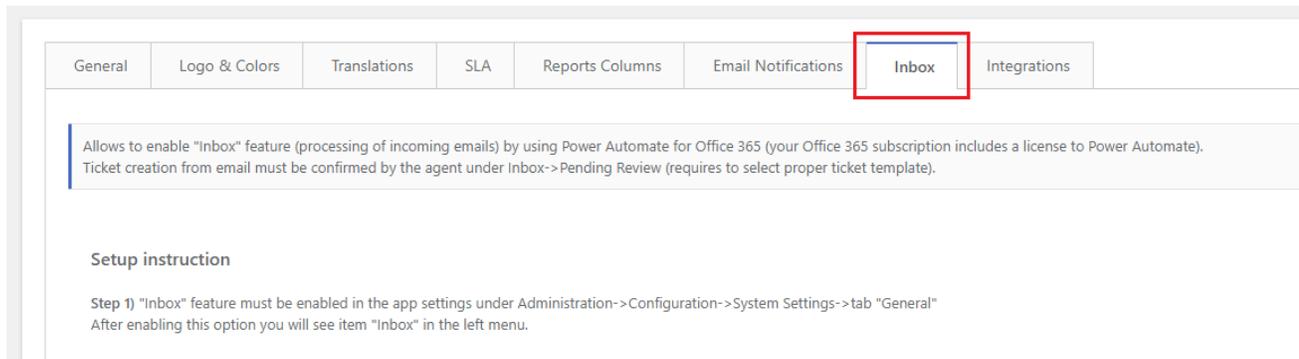
RequesterName X RequesterEmail X TicketDescription X
 TicketPriority X Status X ResolutionTimeInMinutes X TicketType X
 FirstResponseTimeInMinutes X Due X ResolutionDate X

Inbox (creating tickets from emails)

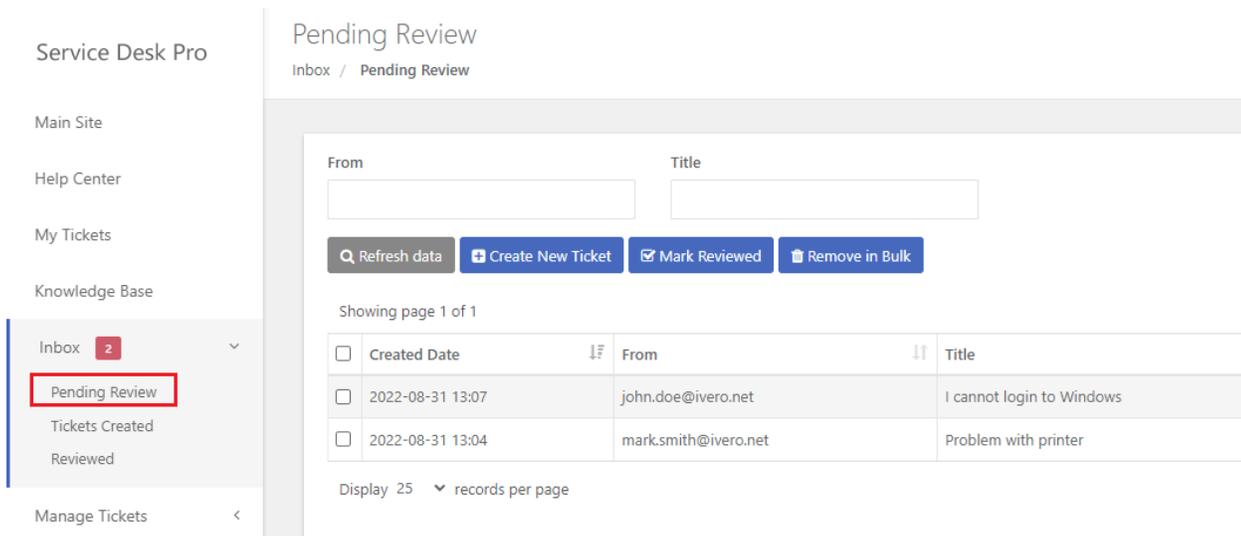
When this option is enabled under general “System Settings”, you can connect to an external mailbox and create tickets for selected emails (in a semi-automatic way - requires selecting ticket template/status and confirming the ticket creation).

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

Service Desk Pro

View Message

Inbox / View Message

Create New Ticket Mark Reviewed Remove Previous Next Back to list

Subject: I cannot login to Windows
Sent: 2022-08-31 13:07
From: john.doe@ivero.net

My account is locked after 10 login attempts. Please reset my password.

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”).

Manage Tickets

Administration

Configuration

Agents

Agent Name

Refresh data Create Bulk Delete

Showing 1 to 2 of 2 entries

| ID | Name | Role | Actions |
|----|------------|---------------|---------------------------|
| 1 | John Doe | Administrator | [Edit] [Delete] [Refresh] |
| 2 | Mark Smith | Technician | [Edit] [Delete] [Refresh] |

Show 25 entries

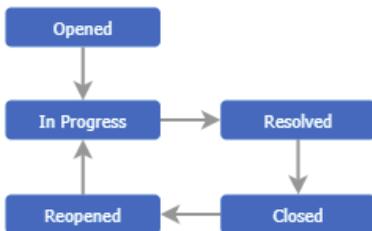
What is also worth mentioning, to see tickets from assigned templates under the "Ticket Management" sections, technicians and admins must also be assigned to the ticket template under Administration->Configuration->Ticket Templates->Edit->field "Agents".

Customizing workflow template(s)

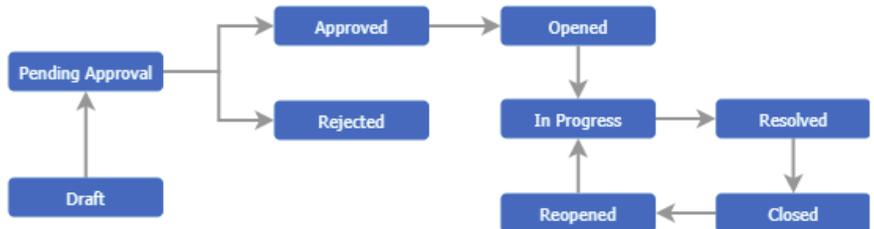
Service Desk Pro contains two predefined workflow templates that can be adjusted to your needs. You can customize the workflow template under Administration->Configuration->Workflow Templates by clicking on the edit icon on the existing workflow or clicking on the “Create” button to create a new workflow.

The screenshot shows the Service Desk Pro administration interface. On the left is a navigation menu with items: main site, Help Center, My Tickets, Knowledge Base, Manage Tickets, Administration, Configuration, Subscription, System Settings, Agents, Dataset, Workflow Templates (highlighted with a red box), Tickets Templates, and Email Templates. The main content area displays a 'Create' button and a table of workflow templates. The table has columns for ID, Name, and Actions. It shows two entries: ID 1 'Help Desk' and ID 2 'Help Desk with pre-approval'. The second entry is highlighted with a red box. Below the table is a 'Show 25 entries' dropdown.

Workflow „Help Desk”



Workflow „Help Desk with pre-approval”



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*”

Service Desk Pro

Main Site

Help Center

My Tickets

Knowledge Base

Manage Tickets <

Administration >

Configuration >

Subscription

System Settings

Agents

Dataset

Workflow Templates

Tickets Templates

Email Templates

KB Categories

Edit Tickets Template

Administration / Tickets Templates / Edit Tickets Template

General Settings | Email Notifications | Custom Form Fields

Save changes | Cancel

Template Name ⓘ IT Request

Category Name ⓘ IT

Agents ⓘ Mark Smith X

Ticket Title ⓘ Entered by the user Auto-generated

Workflow Template ⓘ

- Help Desk
- Select ...
- Help Desk**
- Help Desk with pre-approval

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”

General Settings | States | Actions | State Transition Matrix | Resolution | Satisfaction Survey

Save changes | Cancel

Template Name ⓘ 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.

General Settings | **States** | Actions | State Transition Matrix | Resolution | Satisfaction Survey

+ Add State

Submitted (initial state after creating ticket)

Name  Submitted Assignees  Selected by the user ▼

Edit  Requester + Agent ▼ Remove  Requester + Agent ▼

Assignees Changes  Agent with Technician or Admin role ▼

In Progress

Name  In Progress Assignees  No changes ▼

Edit  Requester + Agent ▼ Remove  Requester + Agent ▼

Assignees Changes  Agent with Technician or Admin role ▼

Done

Name  Done Assignees  No changes ▼

Edit  Requester + Agent ▼ Remove  Requester + Agent ▼

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

General Settings | States | **Actions** | State Transition Matrix | Resolution | Satisfaction Survey

+ Add Action

Start Progress

Name  Start Progress

Who Can Perform  Agent ▼

Done

Name  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”.

General Settings States Actions **State Transition Matrix** Resolution Satisfaction Survey

Tips:

- The row headings contain the initial state (“From”), the column headings contain the target state (“To”).
- Before defining the transition matrix, at least 2 states and 1 action must be defined. To select an action from the list, click on the arrow icon.
- Transition matrix needs to be re-created from the scratch when action or state has been removed or changed.
- Changes in states, actions, state transition matrix and processing time settings works only for newly created tickets - doesn't work backward.

| From \ To | Submitted | In Progress | Done |
|-------------|-----------|------------------|--------|
| Submitted | | Start Progress ▾ | ▾ |
| In Progress | ▾ | | Done ▾ |
| Done | ▾ | ▾ | |

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

General Settings States Actions State Transition Matrix **Resolution** Satisfaction Survey

Resolution State (ticket resolved) ⓘ

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

General Settings States Actions State Transition Matrix Resolution **Satisfaction Survey**

Show Satisfaction Survey In State ⓘ

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.

Service Desk Pro

Administration / Tickets Templates

Showing 1 to 5 of 5 entries

| ID | Category | Name | Actions |
|----|----------|--------------------|--|
| 1 | IT | Hardware Request | [Edit] [Delete] [Copy] [Share] [Refresh] |
| 2 | IT | Software Request | [Edit] [Delete] [Copy] [Share] [Refresh] |
| 3 | IT | Networking Request | [Edit] [Delete] [Copy] [Share] [Refresh] |
| 4 | HR | New Employee | [Edit] [Delete] [Copy] [Share] [Refresh] |
| 5 | HR | Payrol issue | [Edit] [Delete] [Copy] [Share] [Refresh] |

Show 25 entries

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.

Save Cancel

General Info

Ticket Type: Select...

Priority: [HR] New Employee, [HR] Payrol issue, [IT] Hardware Request

Description: [IT] Networking Request, [IT] Software Request

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).

Service Desk Pro

Create New Tickets Template

Administration / Tickets Templates / Create New Tickets Template

General Settings | Email Notifications | Custom Form Fields

Save changes | Cancel

Template Name This field is required

Category Name This field is required

Agents This field is required

Ticket Title Entered by the user Auto-generated

Workflow Template This field is required

Attachments Enabled Disabled

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”.

General Settings | Email Notifications | **Custom Form Fields**

+ Add Custom Field

ID: CustomField1

Display Name: **Category** | Type: **Choice** | Required: | Access Level: **Read+Write** | Conditional Visibility:

Options (comma separated): Corporate network, Internet connection, WIFI problem, VPN problem

ID: CustomField2

Display Name: **WIFI Name** | Type: **Single Line of Text** | Required: | Access Level: **Read+Write** | Conditional Visibility:

Visible When Field: **Category** is equal to **WIFI problem**

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

Save **Cancel**

General Info | Comments | Attachments

Ticket Type: **[IT] Network Request**

Title:

Priority: **Medium**

Description: **B I U S**

Category: **WIFI problem**

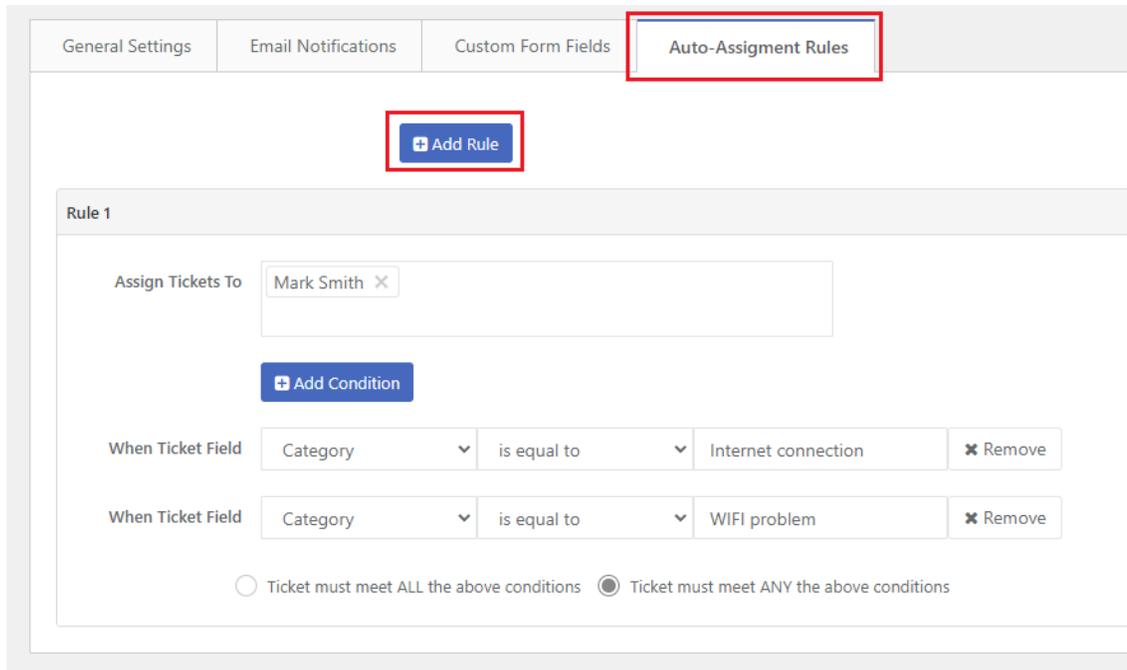
WIFI Name:

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

Auto Assignment  Disabled Static Dynamic (Rule-based)

Apply Auto Assignment To  All Submitted Tickets Unassigned Tickets Only

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”.



General Settings | Email Notifications | Custom Form Fields | **Auto-Assignment Rules**

+ Add Rule

Rule 1

Assign Tickets To: Mark Smith 

+ Add Condition

When Ticket Field: Category  is equal to  Internet connection  Remove

When Ticket Field: Category  is equal to  WIFI problem  Remove

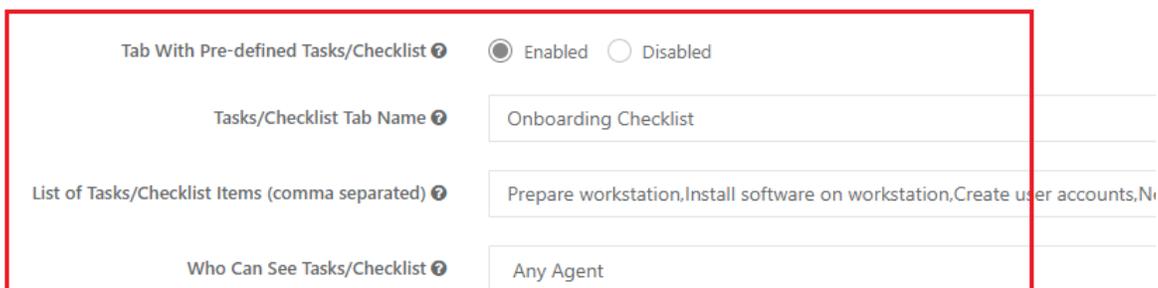
Ticket must meet ALL the above conditions Ticket must meet ANY the above conditions

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”

Auto Assignment  Disabled Static Dynamic (Rule-based)

For Agents Only  Yes No



Tab With Pre-defined Tasks/Checklist  Enabled Disabled

Tasks/Checklist Tab Name  Onboarding Checklist

List of Tasks/Checklist Items (comma separated)  Prepare workstation, Install software on workstation, Create user accounts, N

Who Can See Tasks/Checklist  Any Agent

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.

Save Cancel

General Info Comments **Onboarding Checklist** Attachments

- Prepare workstation
- Install software on workstation
- Create user accounts
- Network setup
- Review data privacy agreements

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).

Main Site
Help Center
My Tickets
Knowledge Base
Manage Tickets <
Administration >
Configuration >
Subscription
System Settings
Agents
Dataset
Workflow Templates
Tickets Templates
Email Templates
KB Categories
Custom Views
Reports <

General Settings Filters Report Columns

Save changes Cancel

View Name ⓘ My To Do List

Add View To Section(s) ⓘ "Administration" and "Manage Tickets" "Manage Tickets" "Administration"

Visibility ⓘ Public View (All Technicians/Admins) Private View (Selected Users)

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

General Settings | **Filters** | Report Columns

Assigned To Logged In User

Over Due

Status

Ticket Priority

Ticket Type

Title Contains Value

Custom Form Field Contains Value

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”.

Service Desk Pro

Main Site

Help Center

My Tickets

Knowledge Base

Manage Tickets

My To Do List

Dashboard

Unassigned

Assigned To Me

Ticket List

Resolution Time

First Response

Satisfaction Surveys

Administration

My To Do List

Manage Tickets / My To Do List

Created Within ID Title

Requester Assignee

Status

Ticket Type Due

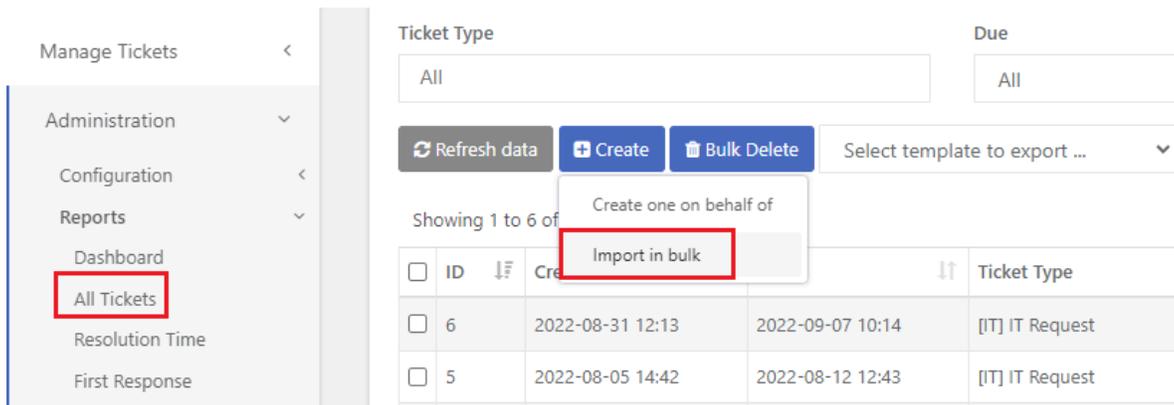
No records available

| <input type="checkbox"/> | ID | Created Date | Due | Ticket Type | Title | Requester | Assignee |
|--------------------------|----|--------------|-----|-------------|-------|-----------|----------|
| No records available | | | | | | | |

Display 25 records per page

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”.



The screenshot shows the 'All Tickets' page. The left sidebar has 'All Tickets' selected. The main area shows a table with columns: ID, Creation Time, Due Time, and Ticket Type. A 'Create' button is highlighted, and a dropdown menu is open showing the 'Import in bulk' option.

| ID | Creation Time | Due Time | Ticket Type |
|----|------------------|------------------|-----------------|
| 6 | 2022-08-31 12:13 | 2022-09-07 10:14 | [IT] IT Request |
| 5 | 2022-08-05 14:42 | 2022-08-12 12:43 | [IT] IT Request |

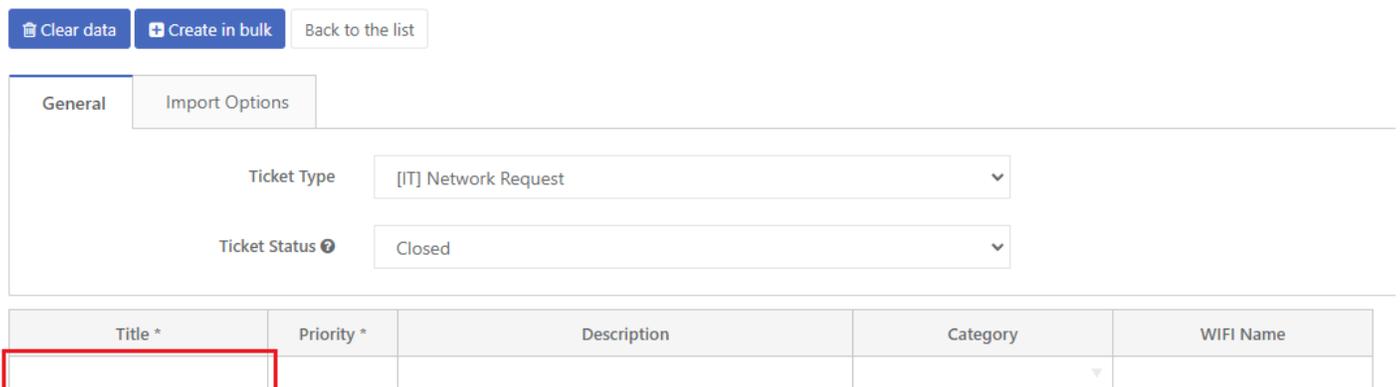
There are two tabs on the import page:

- 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.



The screenshot shows the 'Import Options' tab. The 'Ticket Type' is set to '[IT] Network Request' and 'Ticket Status' is set to 'Closed'. Below the form is a table with columns: Title *, Priority *, Description, Category, and WIFI Name. The first cell in the table is highlighted with a red box.

| Title * | Priority * | Description | Category | WIFI Name |
|---------|------------|-------------|----------|-----------|
| | | | | |

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.

The screenshot shows a configuration interface with four rows of settings:

- Default View for Contributors: Help Center
- Default View for Technicians: Help Center (dropdown menu is open, showing options: Help Center, Dashboard, Ticket List, Unassigned, Assigned To Me)
- Default View for Administrators: Help Center
- Satisfaction Survey: (empty)

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).

Service Desk Pro

Dashboard
Manage Tickets / Dashboard

Created Within: Last 30 days | Ticket Type: All | Status: All | Refresh data | Save my filters

Total: 8 | Assigned To Me: 2 | Unassigned: 6 | Due Today: 0 | Due Tomorrow: 0 | Overdue: 2

Total Tickets by Priority

| | |
|----------|---|
| Low | 1 |
| Medium | 5 |
| High | 1 |
| Critical | 1 |

Total Tickets by Status

| | |
|-------------|---|
| Resolved | 1 |
| In Progress | 2 |
| Closed | 3 |
| Opened | 2 |

Total Tickets by Type

| | |
|-----------------------|---|
| [IT] Software Request | 1 |
| [IT] Hardware Request | 1 |
| [IT] IT Request | 6 |

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

Ticket Type: All | Due: All

Refresh data | Create on behalf of | Select template to export ...

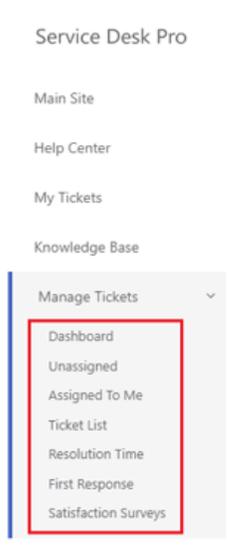
Showing page 1 of 1

| ID | Created Date | Due | Ticket Type | Title | Requester | Assignees | Priority | Status | Actions |
|----|------------------|------------------|-----------------------|------------------|-----------|-----------|----------|-------------|---|
| 8 | 2022-09-02 18:52 | 2022-09-09 16:01 | [IT] Software Request | I need MS Office | John Doe | | Medium | Reopened |     |
| 7 | 2022-09-02 18:51 | 2022-09-09 16:01 | [IT] Hardware Request | I need laptop | John Doe | | Medium | In Progress |     |

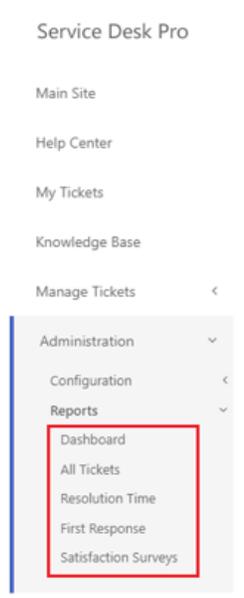
Built-in ticket reports

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)



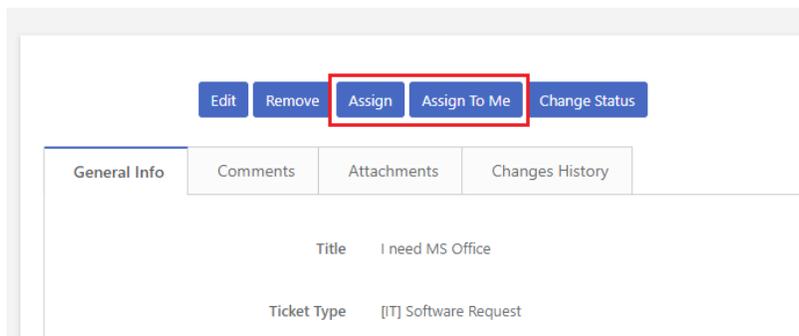
Section „Administration->Report”
(all tickets)

| 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 |

| | | |
|---|----------------------|--|
| | | <p>specific criteria:</p> <p>Average First Response Time - measured from ticket submission by the requester to the first response by the agent (status change or ticket assignment).</p> <p>First Response SLA % - the percentage of tickets that meet the SLA criteria defined under Administration-> Configuration-> System Settings->tab "SLA"->column "First response within".</p> |
| | 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. |

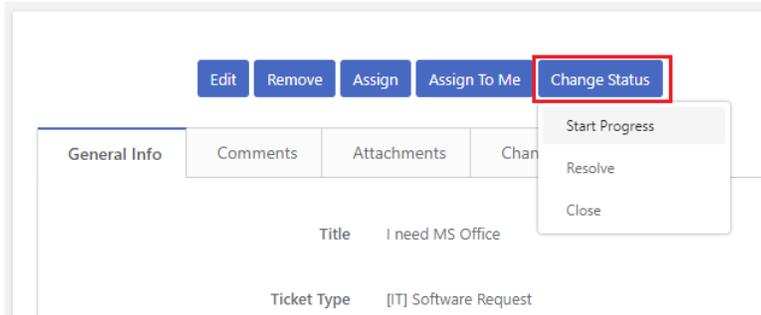
Assigning ticket to agent(s)

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).

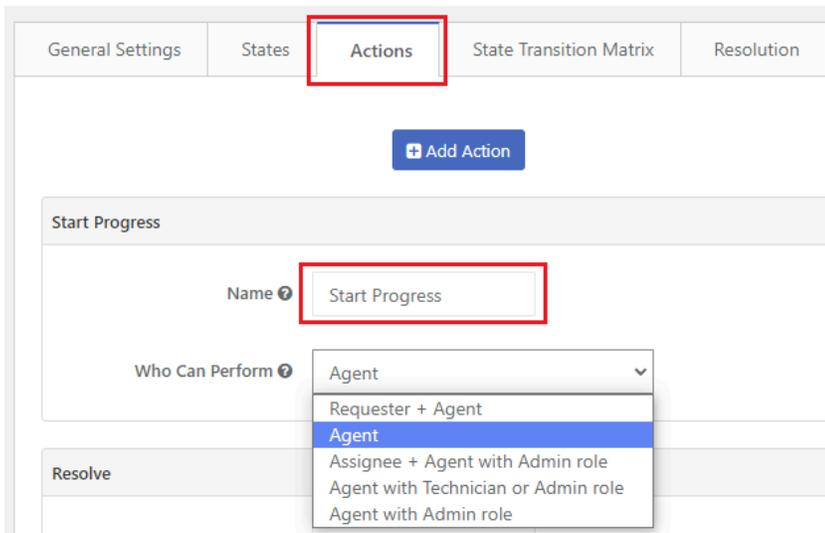


Changing ticket status

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”.

Save Cancel

General Info **Comments** Attachments

Marek Piasecki

B I U

Hidden For Regular Users

Add

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

Confirmation

Add Comment

Ok Cancel

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.

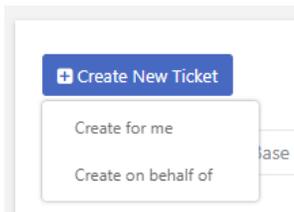
Dataset Enabled Disabled

Followers (CC Notification) Enabled Disabled

Who Can Create Ticket On Behalf Of Others

Link to the Main Site

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).

Tickets Report

Administration / Tickets Report

A screenshot of the "Tickets Report" interface. It features several filter fields: "Created Within" (with date ranges 2021-09-05 to 2023-09-05), "Requester", "Ticket Type" (set to "All"), "Assignee" (set to "All"), and "Due" (set to "All"). Below the filters are buttons for "Refresh data", "Create", "Bulk Delete", and a dropdown for "Select template to export ...". A dropdown menu is open under the "Create" button, showing "Create one on behalf of" (highlighted with a red box) and "Import in bulk". Below this is a table with columns for "ID", "Created", "Updated", and "Ticket Type". The first row shows ID 8, created on 2022-09-02 18:52, updated on 2022-09-09 16:01, and "ITIT Software Request".

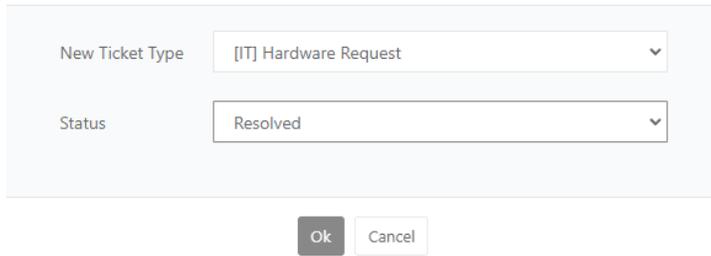
Changing ticket template for already submitted ticket

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

| | | | | | Copy | CSV | Excel | PDF | Print |
|-----------|----------|-------------|---------|--|------|-----|-------|-----|-------|
| Assignees | Priority | Status | Actions | | | | | | |
| | Medium | Reopened | | | | | | | |
| | Medium | In Progress | | | | | | | |
| | Medium | In Progress | | | | | | | |

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

Change Ticket Type



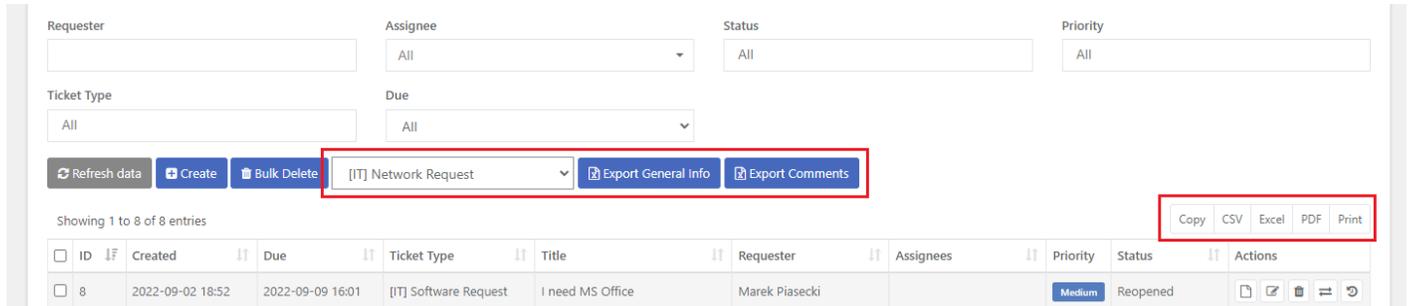
A dialog box titled "Change Ticket Type" with two dropdown menus. The first dropdown is labeled "New Ticket Type" and has "[IT] Hardware Request" selected. The second dropdown is labeled "Status" and has "Resolved" selected. At the bottom are "Ok" and "Cancel" buttons.

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**.



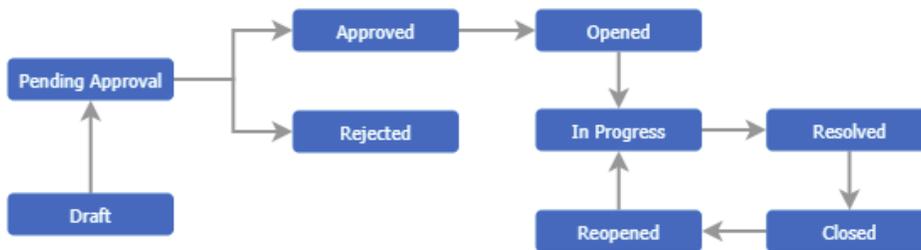
The screenshot shows a ticket management interface. At the top, there are filters for Requester, Assignee, Status, Priority, Ticket Type, and Due. Below the filters is a toolbar with buttons for Refresh data, Create, Bulk Delete, and a dropdown menu currently set to "[IT] Network Request". To the right of the dropdown are buttons for "Export General Info" and "Export Comments". Below the toolbar, it says "Showing 1 to 8 of 8 entries". At the bottom right, there are buttons for Copy, CSV, Excel, PDF, and Print. Below this is a table with columns: ID, Created, Due, Ticket Type, Title, Requester, Assignees, Priority, Status, and Actions. The first row of data shows ID 8, Created 2022-09-02 18:52, Due 2022-09-09 16:01, Ticket Type [IT] Software Request, Title I need MS Office, Requester Marek Piasecki, Assignees (empty), Priority Medium, Status Reopened, and Actions (Copy, Print, Delete, Refresh).

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.

Ticket Title Entered by the user Auto-generated

Workflow Template

Attachments Enabled Disabled

Custom Tab Enabled Disabled

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

General Settings **States** Actions State Transition Matrix Resolution Satisfaction Survey

[+ Add State](#)

Draft (initial state after creating ticket)

Name Assignees

Edit Remove

Assignees Changes

Pending Approval

Name Assignees

Edit Remove

Assignees Changes

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*

[Assign](#) [Assign To Me](#) [Change Status](#)

[Submit For Approval](#)

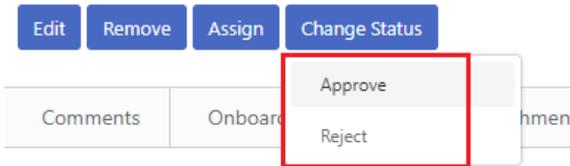
[Onboarding Checklist](#) [Attachments](#) [Changes History](#)

- 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.

Confirmation

Assignees

-
- 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.

