COMODO
Creating Trust Online®

Comodo One

Software Version 3.30

Service Desk Staff Guide

Guide Version 4.20.010820

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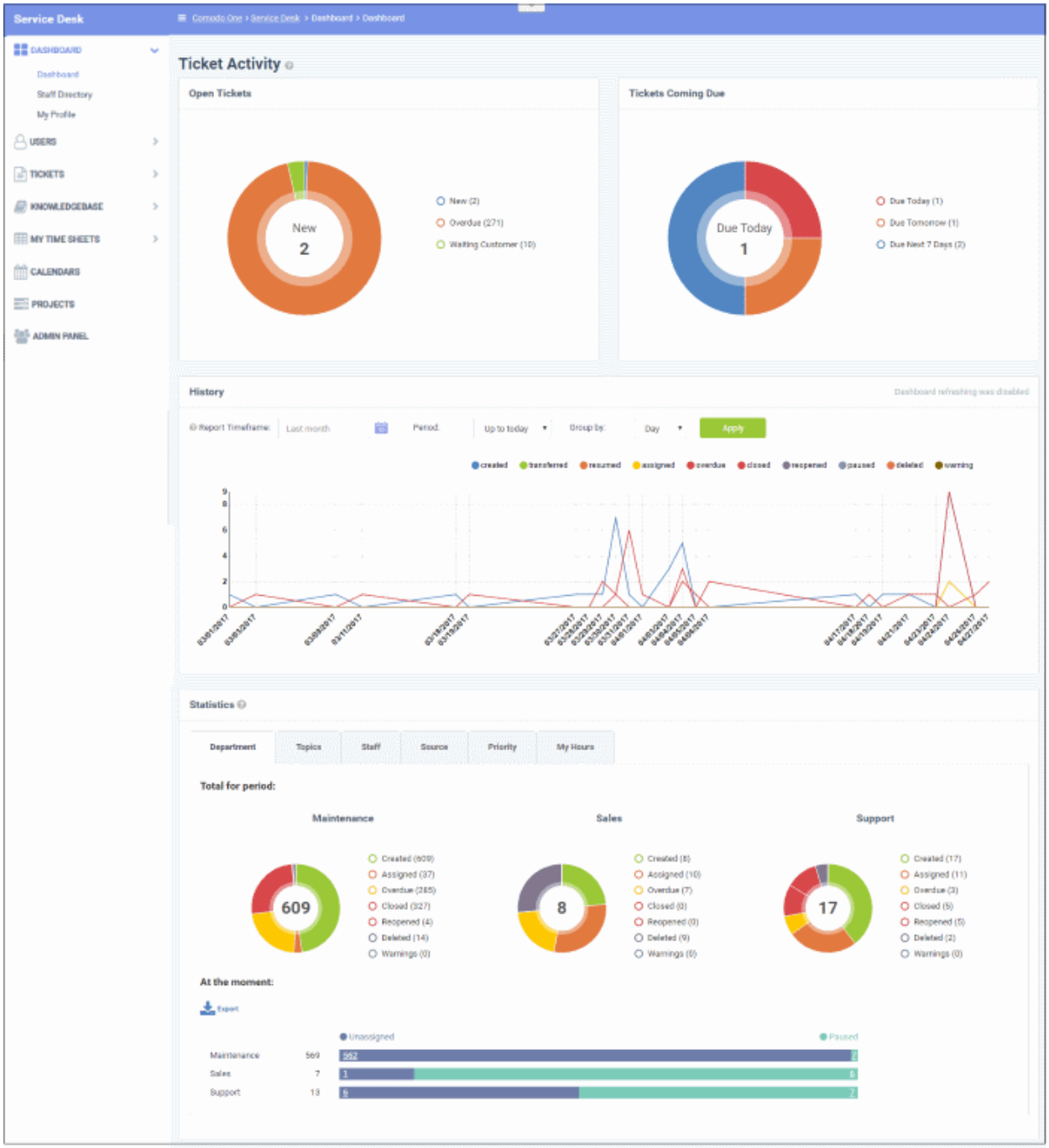
1 Introduction to Service Desk Module

Comodo Service Desk is a fully featured ticket management system which allows enterprises to implement strong and effective work-flows for internal and customer-facing support departments. The system allows help desk staff to respond to and manage tickets raised by users, reassign them to other departments or organizations, generate reports, manage time-sheets and more.



Key Features:

- **Dashboard** - At-a-glance overview of ticket activity over time. The charts and tables on the dashboard allow you to quickly view the overall status of your operation. The dashboard also provides a starting point from which you can deep-dive into more detailed areas.
- **Customer Web Portal** - No account registration is required for users to submit tickets. Service Desk allows end-users to view their ticket thread by logging in with their email address and ticket number.

- **Ticket Creation** - Allows users to raise tickets in multiple ways - via email, over phone to staff members and web portal as a guest or as a registered user.
- **Service Level Agreements (SLA)** - Easily define service level agreements and configure ticket due dates and warnings to match.
- **Ticket Categories** - Ticket Categories, in combination with custom forms, can be used to gather better information from customers and to assign tickets to specific departments. Ticket Categories can be configured with a basic workflow, allowing automated re-assignment of tickets to different departments/staff at successive stages, with different SLAs.
- **Custom Forms and Fields** - Custom forms are designed to gather the precise data your support department needs from end-users in order to solve an issue. Custom forms and fields can be provided with ticket categories to route tickets to the correct department and so cut down response time.
- **Ticket Filters** - Ticket filter rules ensure tickets matching certain criteria are assigned to specific departments/staff members or have default actions applied to them. Ticket filter actions include reject ticket, auto-assign, canned response and more.
- **Ticket Assignment and Transfer** - Tickets can easily be reassigned to different departments and staff members as required. Internal logs are created to to keep track of ticket transfers.
- **Auto-Responder** - Configure automatic replies sent to user for new ticket creation. Personalize the auto-responders by inserting variables such as first name and more.
- **Knowledgebase** - Post solutions to frequently asked questions (FAQs) and create canned responses so staff can quickly answer routine enquiries. FAQs can help customers find answers to common questions and so reduce the number of tickets submitted. Resolved tickets also can be posted to the knowledgebase.
- **Projects** - Staff members can create Gannt charts to plan and track progress on company projects. Individual tasks and sub-tasks can be assigned completion percentages, time spent and billable time. Service desk tickets can also be bound to any task, meaning any updates in the ticket regarding completion, time-spent and billable time will be dynamically reflected in the parent task.
- **Time Sheets** - Time sheets allows administrators to track staff working hours and evaluate their performance. Staff Members can create and submit time sheets in the 'My Time Sheets' interface of the staff panel. Admins can review and approve time sheets in the admin interface by clicking 'Staff > Time Sheets'.
- **Calendars** - Create appointments and events.
- **Charging Plans** - Charging plans are templates that define custom hourly rates for specific service types or assets. Charging plans are applied to customer contracts. The rates in the plan are applied after any prepaid hours in the contract have been used up.

  There are two types of charging plans:

  - **Default Charging Plan** - A global plan that lets you define default hourly rates for different asset types. This rate will be charged if:
    - A customer does not have a contract
    - The contract with a customer does not include a charging plan
  - **Custom Charging Plan** - Set different hourly rates for work on certain assets, or for providing support of a particular type (telephone, remote, on-site). The plan can then be associated with a contract. Each custom charging plan includes:
    - Default hourly rate (mandatory) applied to sessions not covered by a variable rate
    - Variable Rates (optional) for specific types of work. Variable rates are implemented by constructing a conditional rule. Work which meets the criteria will be charged at the rate you set. For example, you might want to charge a different rate for on-site visits, or for work on a particular type of asset, or for work that exceeds a certain length of time.

Guide Structure

This guide is intended to take you through the configuration and use of C1 - Service Desk and is broken down into the following main sections.

- Introduction to Service Desk Module
  - Quick Start
  - Log-in to the Service Desk Module
- Service Desk Staff Panel
  - Staff Panel Dashboard
  - Manage Users and Customers
  - Manage Tickets
  - Manage Knowledgebase
  - Manage Projects
  - Manage Staff Time Sheets
  - Manage Calendars

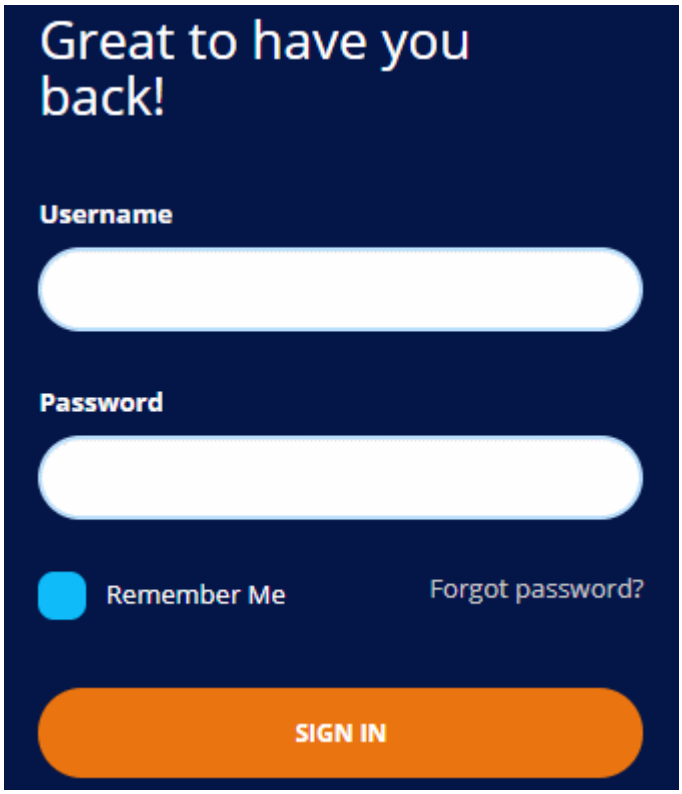
1.1 Quick Start

This tutorial explains how staff can add end users who needs support, create organizations, add knowledge base articles and manage their time sheets.

- Step 1 - Login to the Staff Console
- Step 2 - Enroll users
- Step 3 - Create new customers and assign users to customers
- Step 4 - Manage Tickets
- Step 5 - Manage the Knowledgebase
- Step 6 - Manage your time sheet

Step 1 - Login to the Staff Console

To access the Service Desk Module, login to C1 with your user name and password at **https://one.comodo.com/app/login**



- Enter your credentials and click 'Login'.
- If two-factor authentication is setup for the account then follow the on-screen instructions. The instructions will tell you how to configure the authentication application on your iOS or Android device.
    - Open the Google Authenticator app on your paired device and enter the displayed code. Please note this code changes frequently.
- Once logged-in, click 'Licensed Applications' at the top then 'Service Desk'

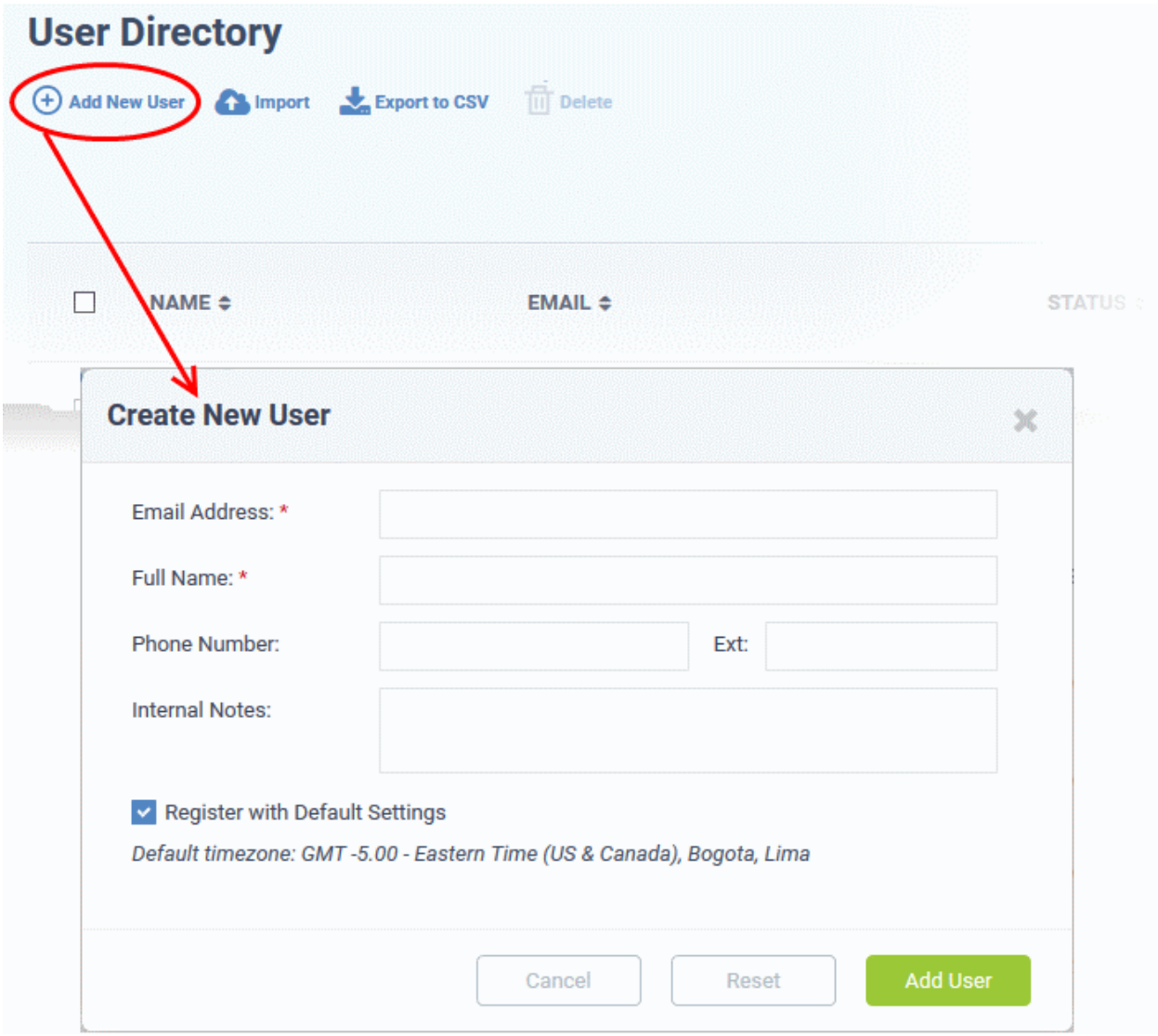
By default, Service Desk will open at 'Staff Panel' > 'Open Tickets'.

Step 2 - Enroll Users

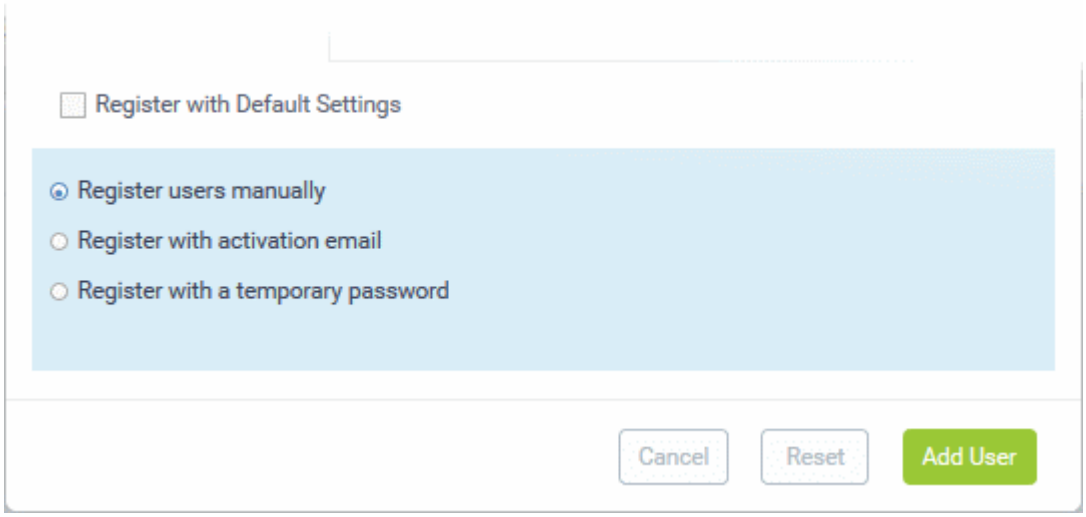
- Click > 'Staff Panel' > 'Users' > 'User Directory'
- New users can self-enroll then submit tickets at your customer facing client portal
    - Your client portal URL has the format https://***company-name***.servicedesk.comodo.com.
    - Users that self-enroll will be sent an account activation mail
- Admins can also manually enroll new users:
    - Click 'Staff Panel' > 'Users' > 'User Directory' > 'Add New User' OR 'Import'
- All users, regardless of enrollment method, can be added to a customer as explained in **step 3**.
- You can set the default registration method for manually enrolled users in 'Admin Panel' > 'Settings' > 'Users'. See **User Registration Settings** in the Service Desk admin guide for more details.
- This section explains how to add individual users:

Enroll new users

- Click 'Staff Panel' > 'Users' > 'User Directory'
- Click the 'Add New User' link at the top



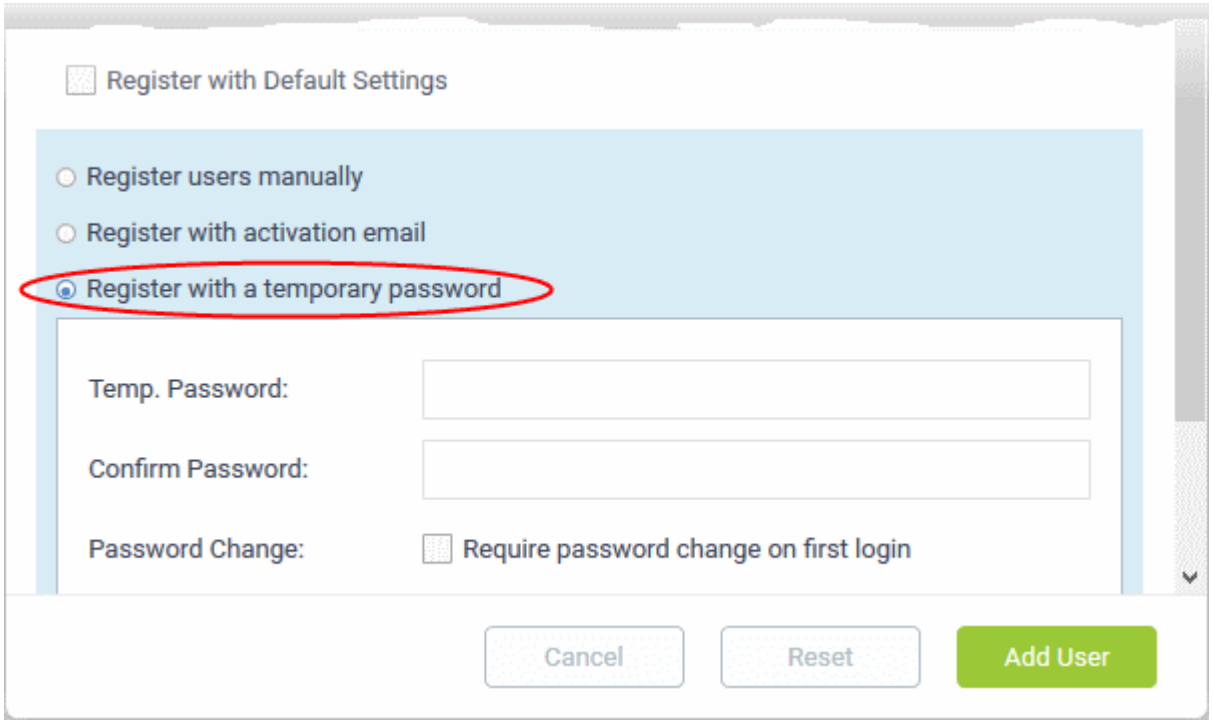
- **Email Address**: User's mail address. After registration, users can login to your support web portal using the email address as username.
- **Full Name**: The first and last names of the user.
- **Phone Number**: The contact number of the user.
- **Internal Notes**: Enter any notes regarding the user.
- **Register with Default Settings**: Select whether the registration should use the settings in 'Admin Panel' > 'Settings' > 'Users'
  - Leave selected if you want to use the default settings.
  - Deselect to choose a different registration method.
  - See **User Registration Settings** in the Service Desk admin guide if you need help with this.



- **Register users manually** - The user is initially added a guest and needs to be manually registered afterwards. You can register a guest as follows:
  - Click 'Users' > 'User Directory' > click on the name of the guest > Click the 'Register' button
- **Register with activation email** - The user is initially added as a guest and sent a mail which contains a link to register their account.

  The link leads to your support web portal where the user will create a password and so register their account. After registration, the user can login and manage/view their tickets.
- **Register with a temporary password** - Create a temporary account password which registers the user immediately.

  You need to send the password and URL of your support portal to the user. This allows them to login and manage their tickets.
  - '*Require password change on first login*' - Enable to force the user to create a new password after first login (recommended):



- Click 'Add User'.

The user is added as a guest or registered user depending on your selection above. After a user is registered, you can manage their account and assign them to a customer company.

You can also import users from a .CSV file by clicking the 'Import' button. The process of enrolling users is the same as explained above. See **Manage Users and Customers** for more details.

Step 3 - Create new customers and assign users to customers

- A customer is an organization, usually a company or business from whom you will accept tickets. 'Users' are the people who actually submit the tickets.
- You can assign users to a customer in the 'User Directory' interface.

There are two options to add a customer:

- **Create a customer in the Comodo One Interface** (preferred)

  Customers added to C1 are fully managed, which means they are also available in other C1 modules (Service Desk, Endpoint Manager, Dome Shield).

  - Click 'Management' > 'Customer' > 'New Customer' to create a customer in C1.
- **Create a customer in Service Desk**

  Customers added directly to Service Desk are 'standalone' customers. They are not visible in C1 nor available to other C1 modules.

  - Click 'Staff Panel', > 'Users' > 'Customers' > 'Add New Customer' to add a customer to Service Desk.

You can also create a new customer directly from a user's detail screen.

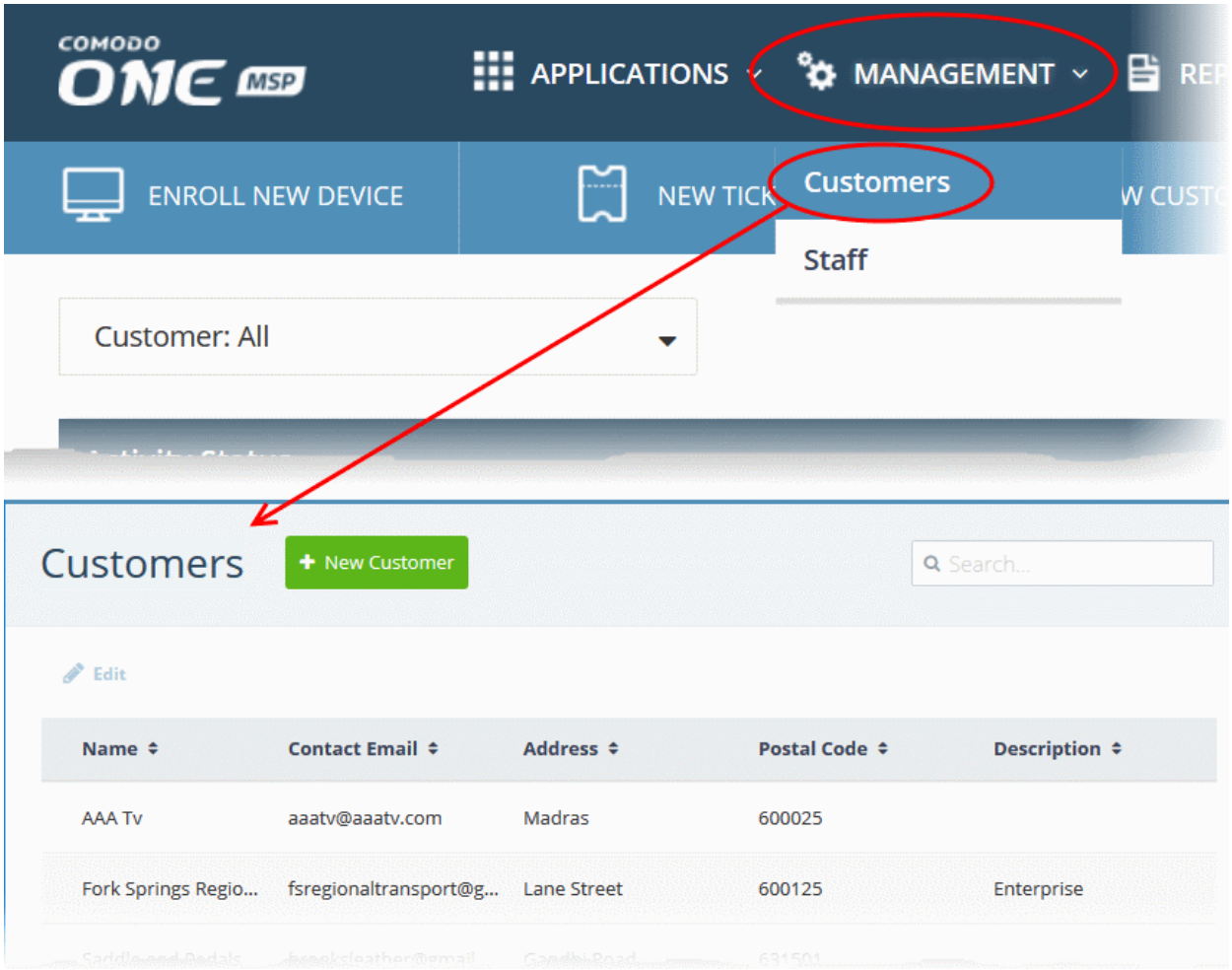
Add a new customer

- **Add a customer in the C1 interface**
- **Add a standalone customer in Service Desk**

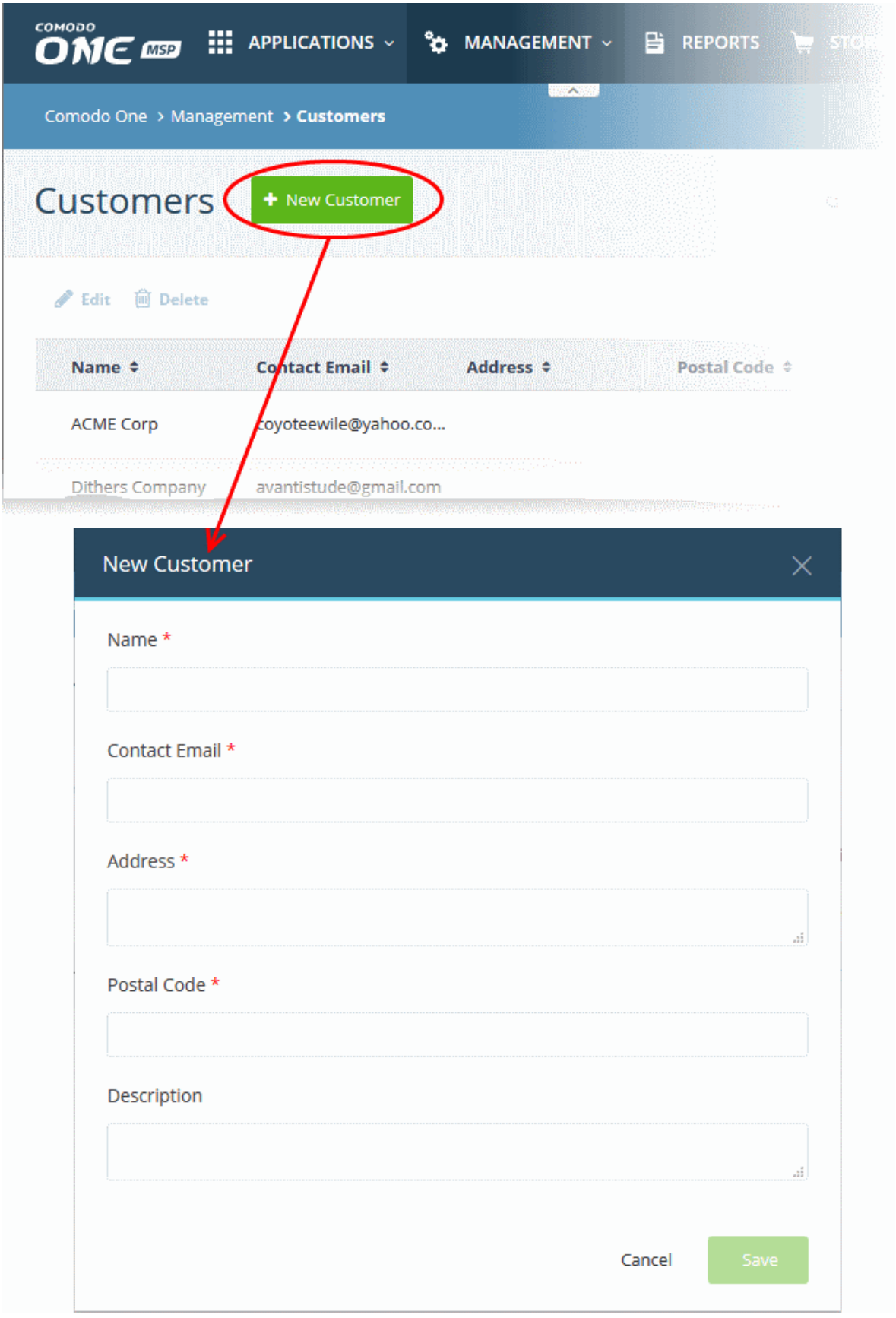
Add a customer in the C1 interface

> **Note**: Only C1 MSP users can add multiple customers. C1 Enterprise users can add standalone customers in the SD interface.

- Log in at **https://one.comodo.com/app/login**.
- Click 'Management' > 'Customer'
- The interface shows any existing customers added to Comodo One:



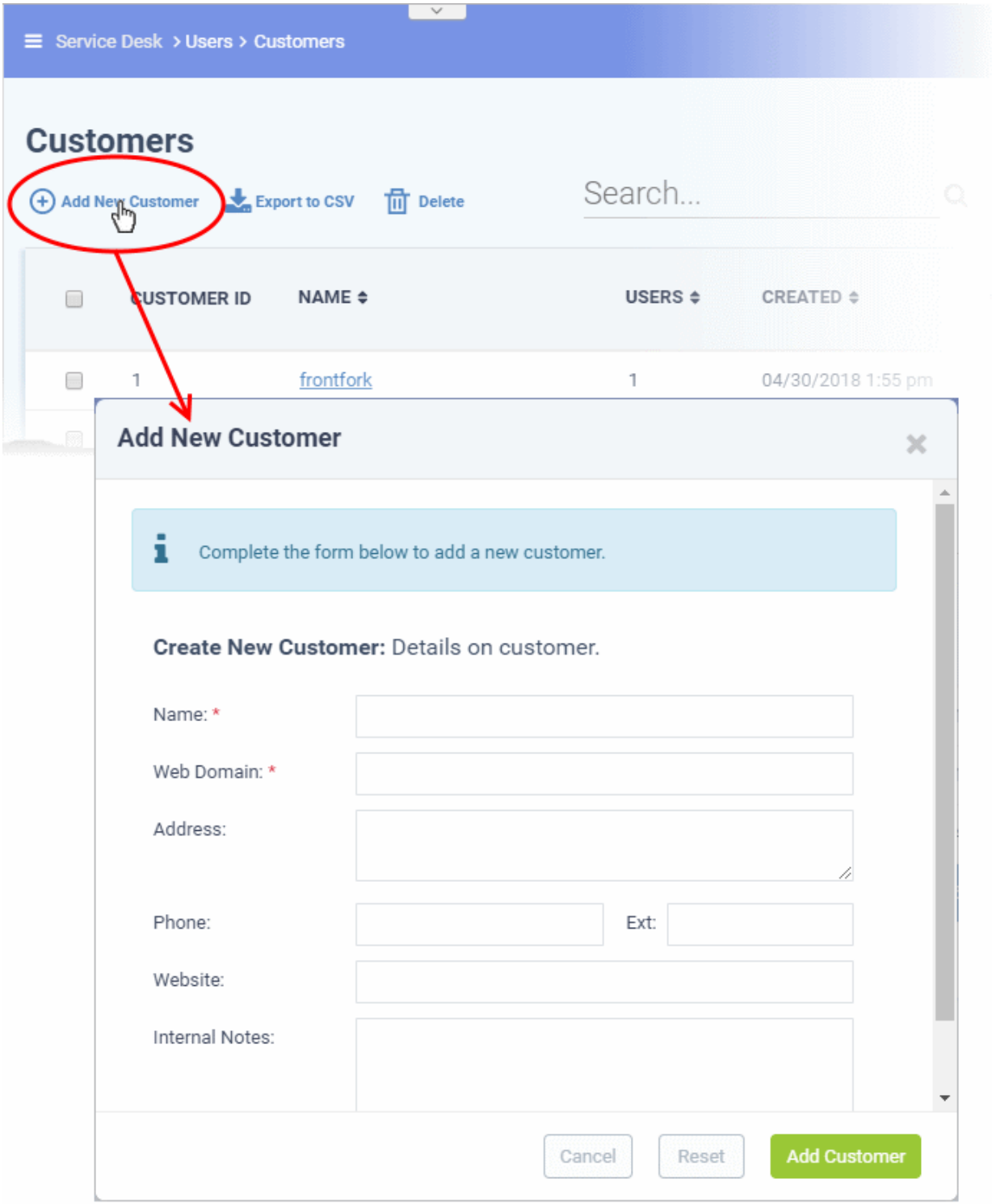
- Click the 'New Customer' button:



- Complete all mandatory fields then click 'Save'.
- Click the 'Customers' button in the main navigation to view your new customer.

Add a standalone customer to Service Desk

- Click 'Staff Panel' > 'Users' > 'Customers'
- Click 'Add New Customer' at the top



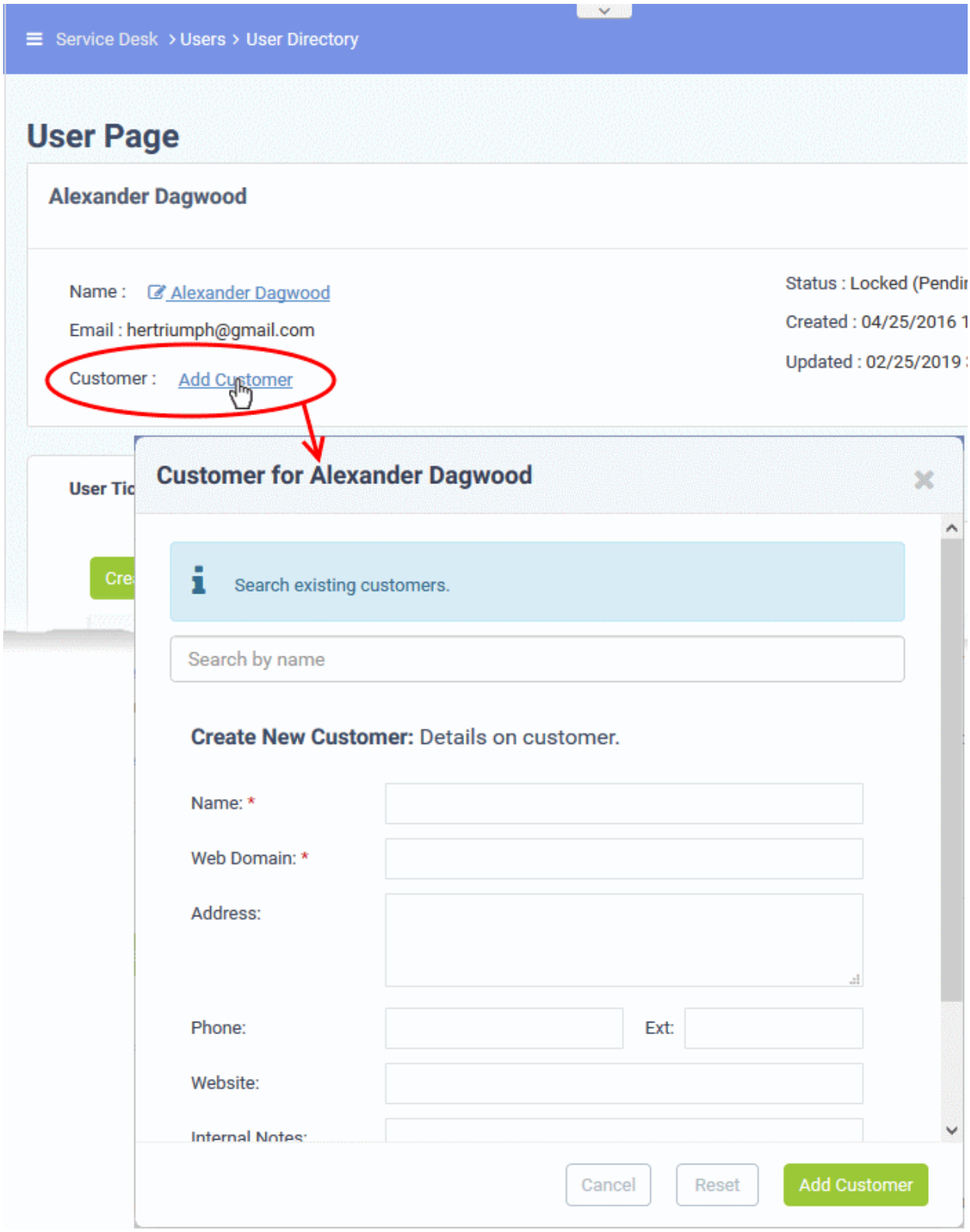
- **Name**: Enter a label for the customer company.
- **Web Domain**: Enter the name of the email domain used for employees of the company.
  - Service Desk creates two new users with email addresses in this domain - 'Monitor Agent' and 'Patch Management Agent'. These accounts are used to receive automatically generated tickets from Endpoint Manager.
  - They also assign to the customer any guests who submit tickets from an email at their domain.

- **Address and Phone**: Contact details of the company.
- **Website**: URL of the customer's public-facing / marketing website.
- **Internal Notes**: Enter any comments about the customer.
- Click 'Add Customer' after completing the form.

Staff can now configure customer settings, users and billing rates. See '**Manage Customers**' later in this guide for help with this.

Assign users to a customer

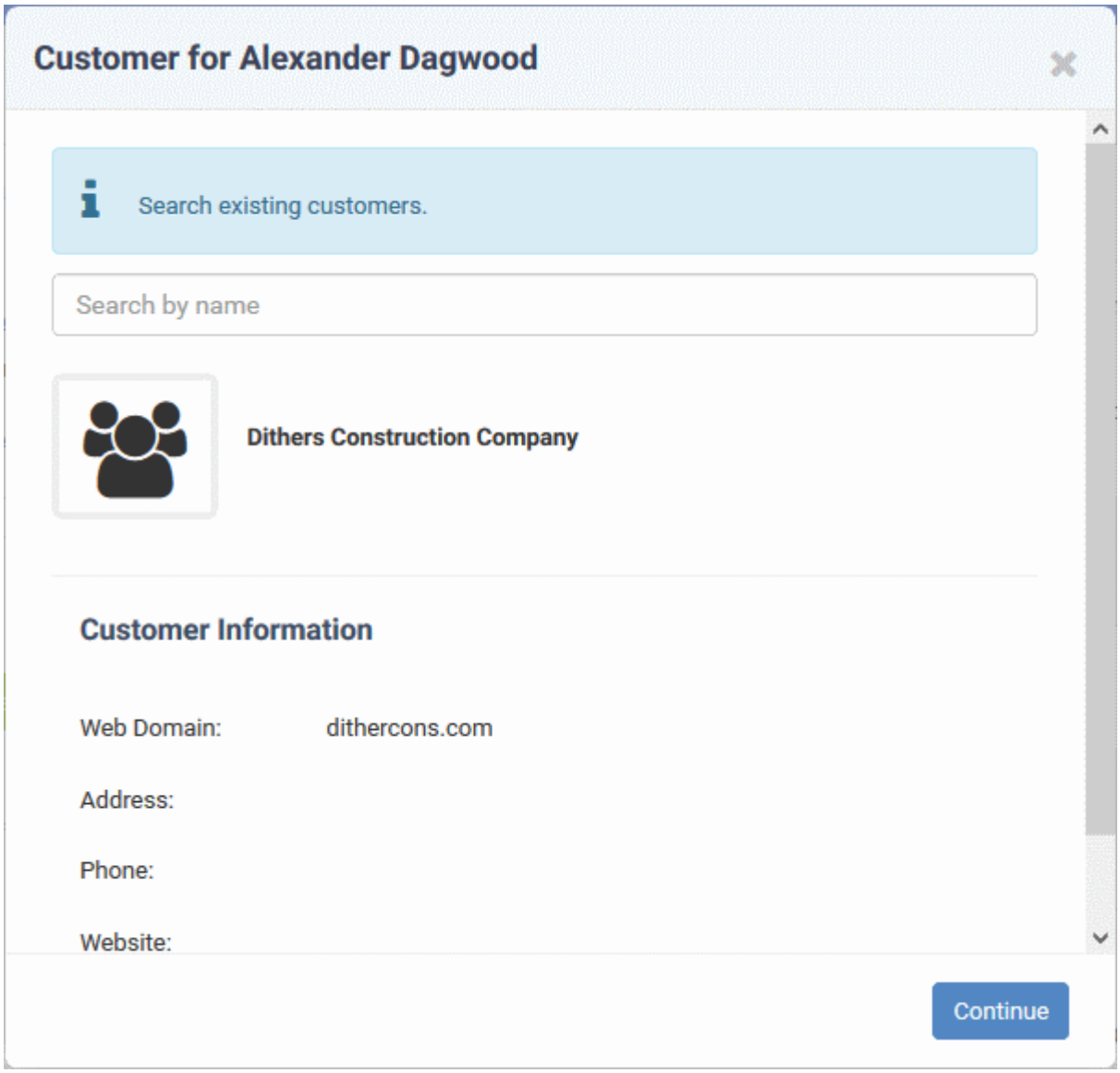
- Open the 'Staff Panel'
- Click 'Users' > 'User Directory'
- Click on the name of a user to open their details page.
- Click the 'Add Customer ' link as shown:



You can assign the user to an existing customer or to a new customer

- **Add user to an existing customer** - Type the first few letters of the customer name in the search field. Select from the suggestions.

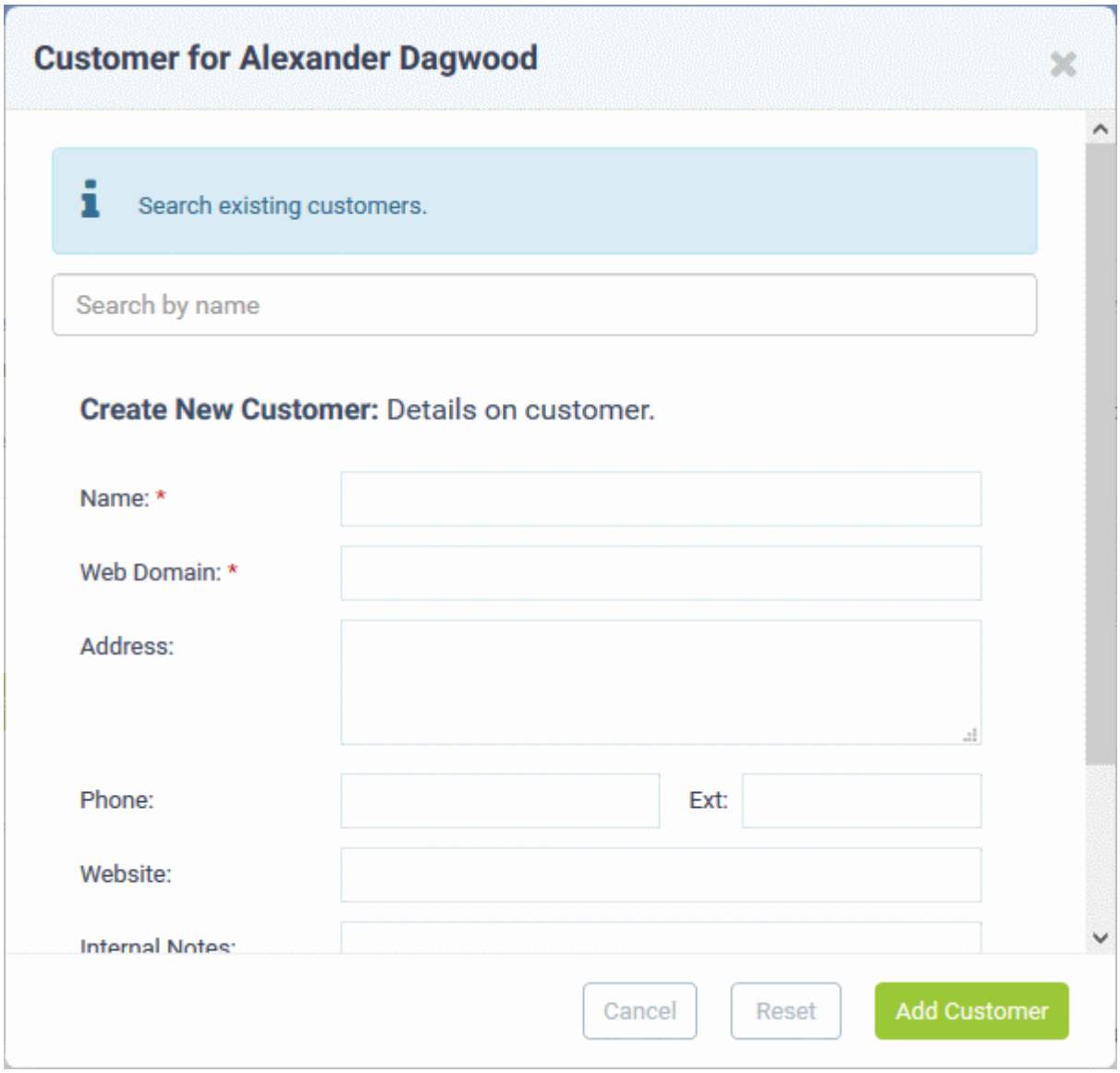
A confirmation appears after choosing the customer:



- Click 'Continue'.

The user will be added to the customer.

- Alternatively, complete all fields to create a new customer, then click 'Add Customer':

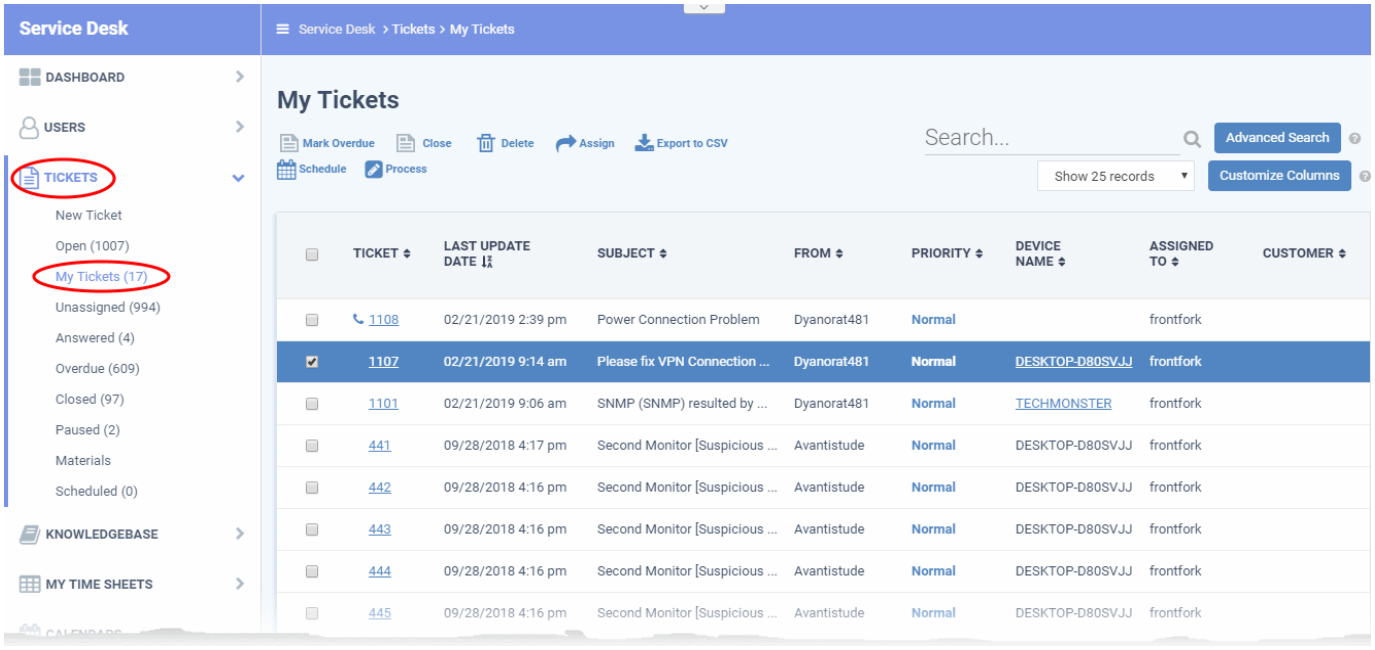


- See **Manage Customers** if you need help to create a new customer.

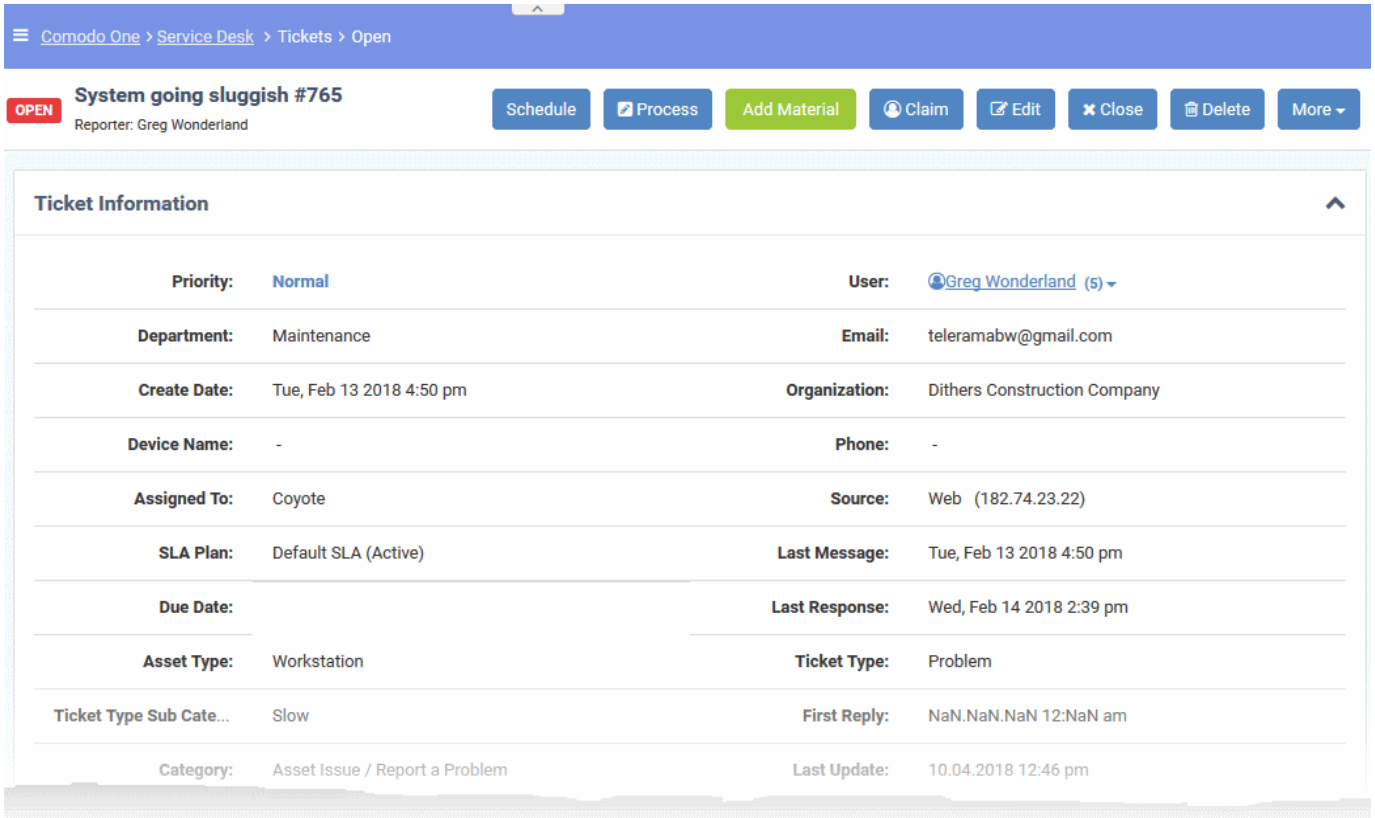
The new customer and user are added to Service Desk.

Step 4 - Manage Tickets

Click 'Staff Panel' > 'Tickets' to view tickets sent in by users:



- Use the menu on the left to filter tickets by status. Filters include 'Open', 'Answered', 'Unassigned', 'My tickets', 'Overdue', 'Closed' and 'Paused'. You can customize the columns shown in each view. See '**Manage Tickets**' to find out more.
- Click any ticket number to open the ticket's detail page.
- The details page lets you view ticket history, reply to the ticket, reassign it, add materials, and more.



- The structure of your tickets can be customized as required in 'Admin Panel' > 'Settings' > 'Tickets'. See '**Ticket Settings and Options**' help with this.

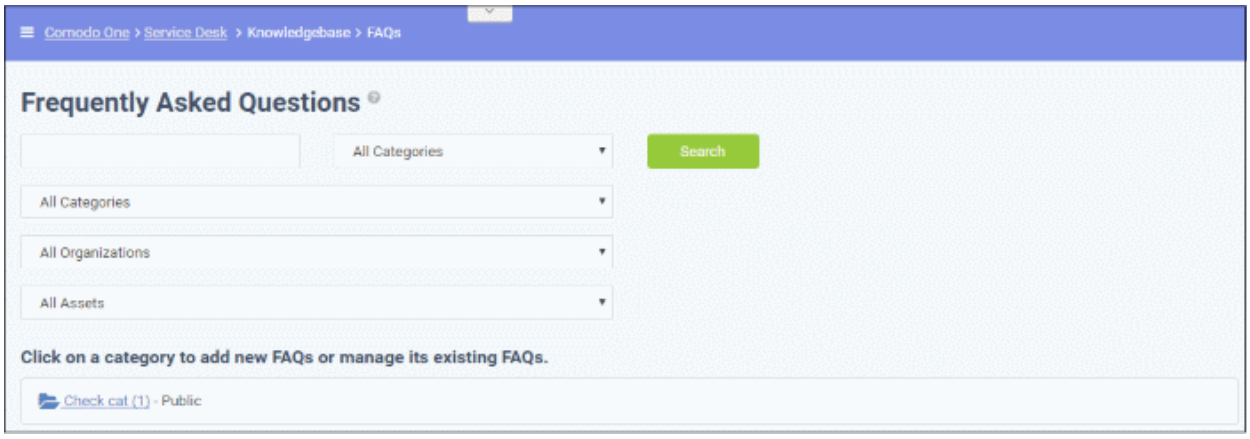
Step 5 - Manage Knowledgebase

The 'Knowledgebase' allows you to:

- Create a set of FAQs which will be shown on your support portal to help users find answers to common problems.
- Create FAQ categories. FAQs must be placed in a category. For example, you can create a category called 'Hardware' and place all hardware related FAQs in it.
- Create canned responses. Canned responses are pieces of text which can be quickly pasted into ticket replies.

To create an FAQ:

1. Click 'Staff Panel' > 'Knowledgebase' to open the interface:



2. Create an FAQ category.
   - Individual FAQs must be assigned to a category.
   - Go to 'Knowledgebase' > 'Categories' to view and edit available categories.
   - If no suitable categories exist for your FAQ then you should create one.
   - Make sure the category type is set to 'Public'.
3. Create your FAQ
   - Go to 'Knowledgebase' > 'FAQs' > Click the category to which you wish you add your FAQ
   - Click 'Add New FAQ' and write your FAQ into the form
   - Select 'Public' as the 'Listing Type'
   - Click 'Add FAQ' to publish to the customer portal.

See '**Manage the Knowledgebase**' for further help.

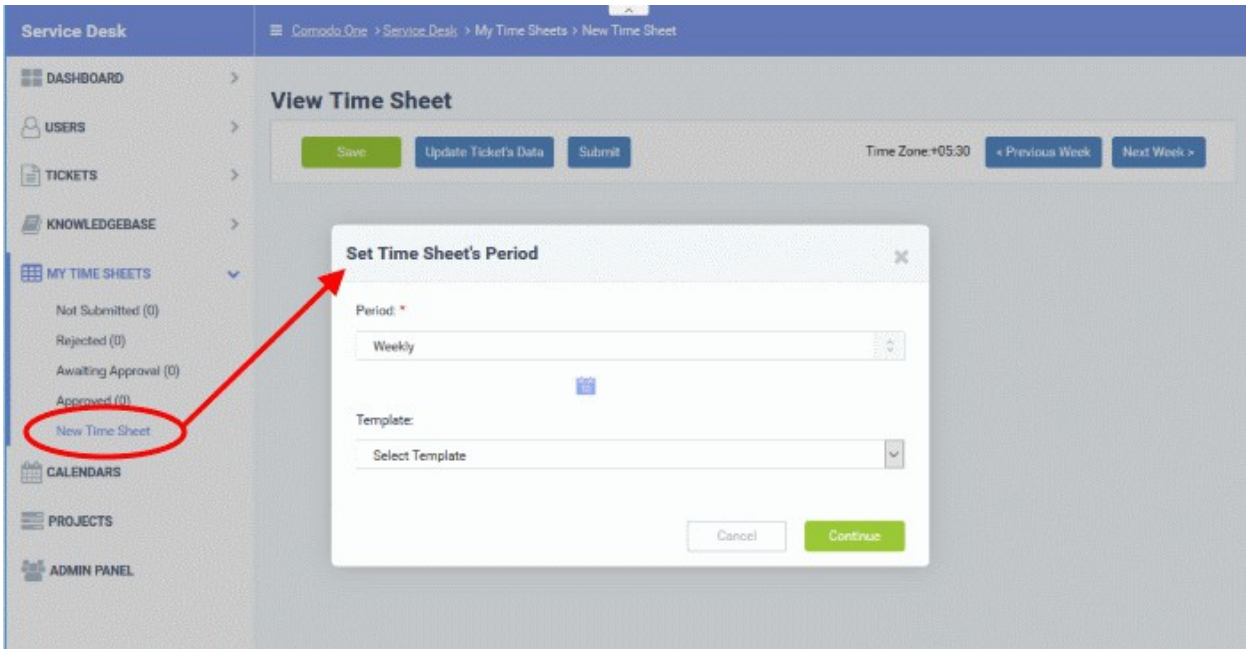
Step 6 - Manage Your Time Sheets

The 'My Time Sheets' interface allows you to:

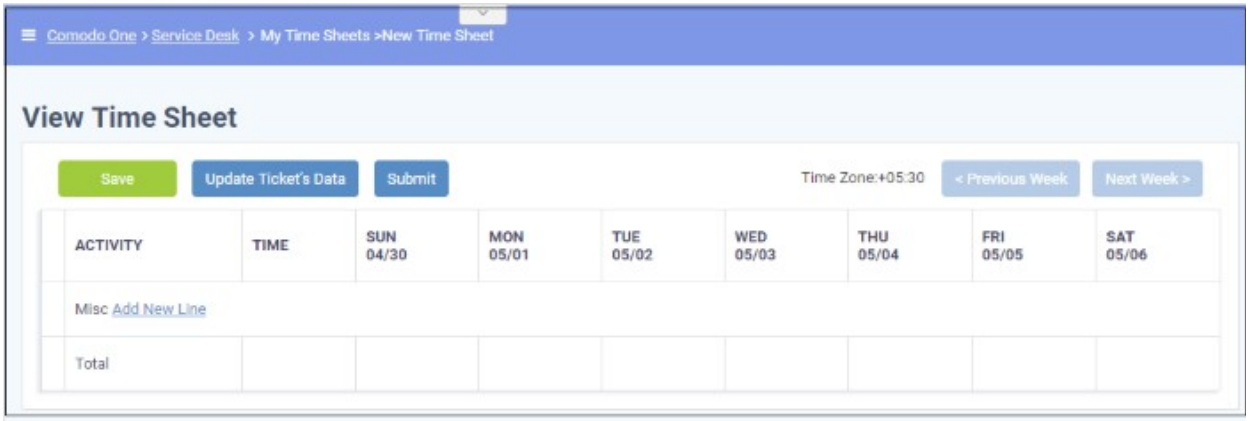
- Create time sheets to record your activities
- Submit time sheets for approval
- You can enter activities manually and / or import tasks from tickets

To create a time sheet

- Click 'My Time Sheets' on the left then 'New Time Sheet'



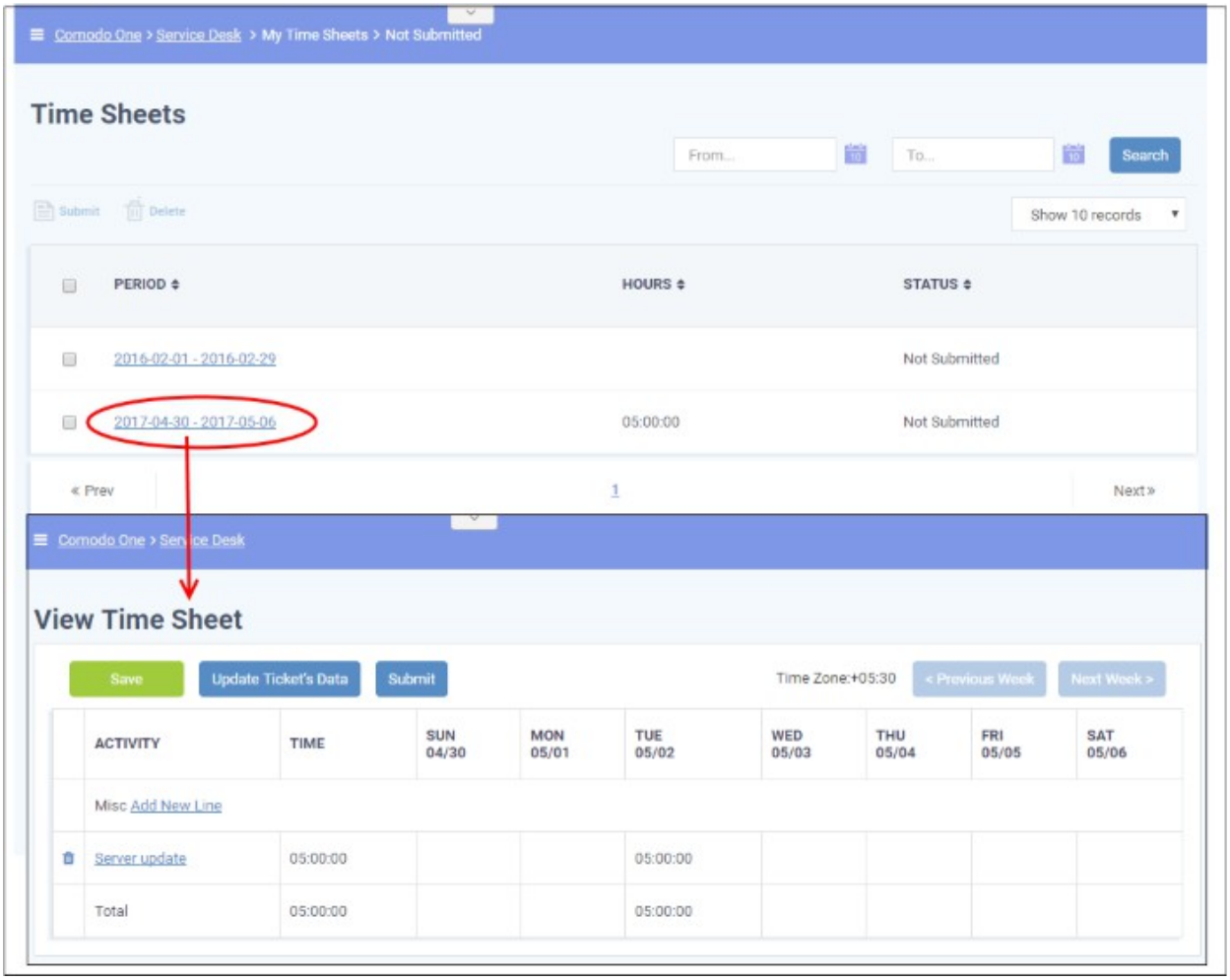
- Select the period from the 'Period' drop-down. The available options are:
  - Weekly - Allows you to select current week or any previous/forth coming week starting from Sunday to Saturday, by clicking the clicking the calendar icon beside it.
  - First Half of Month - Allows you to include the first fortnight of the current month or any month.
  - Second Half of Month - Allows you to include the second fortnight of the current month or any month.
  - Monthly - Allows you to include a full month from 1st to 30th/31st of the current month or any month.
    - Click 'Done' after selecting your preferred period.
- Select the time sheet template, if required, from the 'Template' drop-down. The templates that are available here are configured in the Admin panel under 'Staff' > 'Timesheet Templates'
- Click 'Continue' after selecting the template (if required) and date range to be covered by the sheet.



A new sheet will be added for the date range with a status of 'Not Submitted'. You can update activities on the sheet and click 'Save'

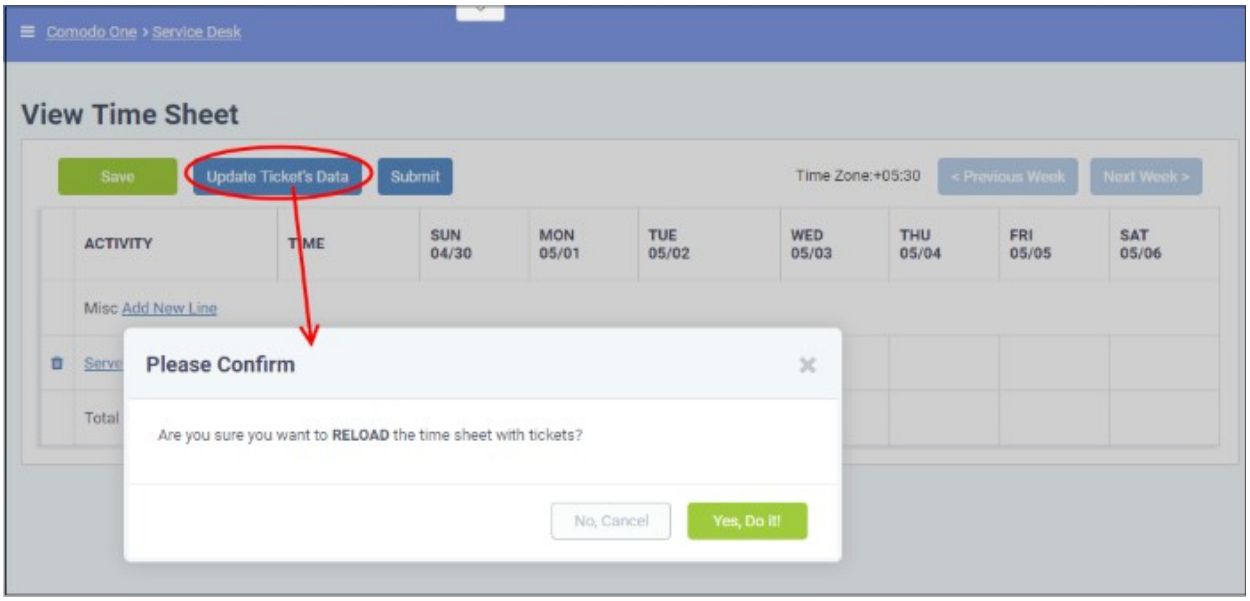
To update a time sheet

- Click the time sheet to be updated, from the 'My Time Sheets' interface



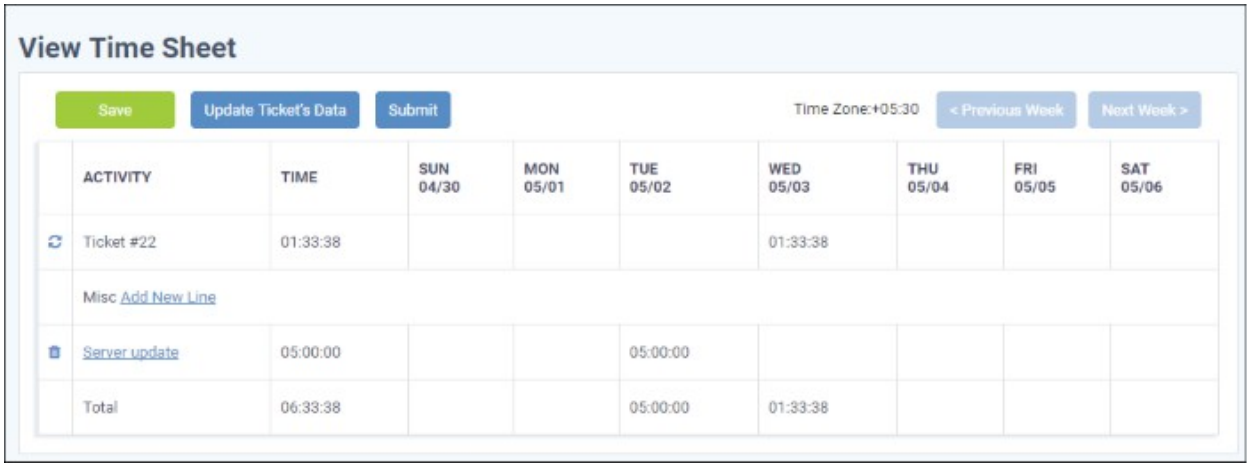
The screen for updating the time sheet will open, displaying each activity in a line, total time spent on it and time spent on them on each day in the time period covered by the time sheet. The screen displays the first week, within the period by default. To view the details on the previous or next weeks, use the 'Previous Week' and 'Next Week' buttons at the top.

- To import the tickets you worked on and time spent, within the time period, click he 'Update Ticket's Data' button.

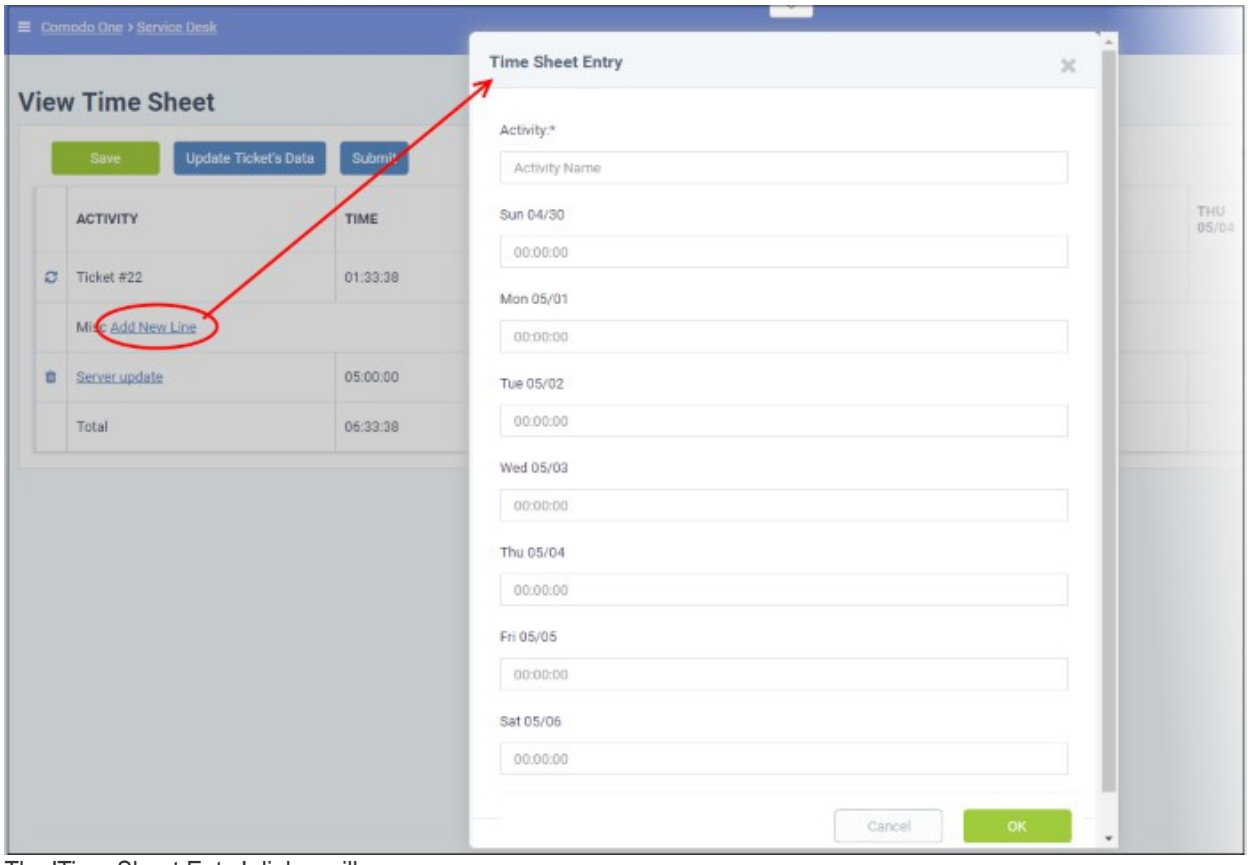


- Click 'Yes, Do it!' in the confirmation dialog

The sheet will be automatically updated with all tickets and time spent covered by the time sheet period. You can repeat this process during the time period to update the sheet with the latest details

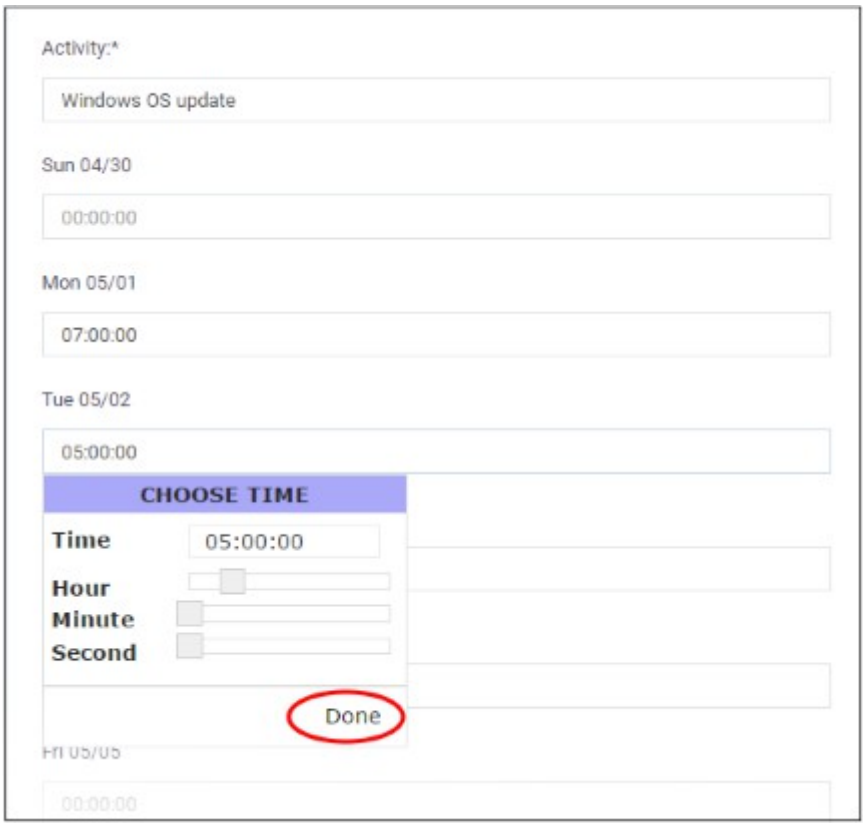


- Click 'Save' for your changes to take effect
- To manually add an activity, click 'Add New Line'



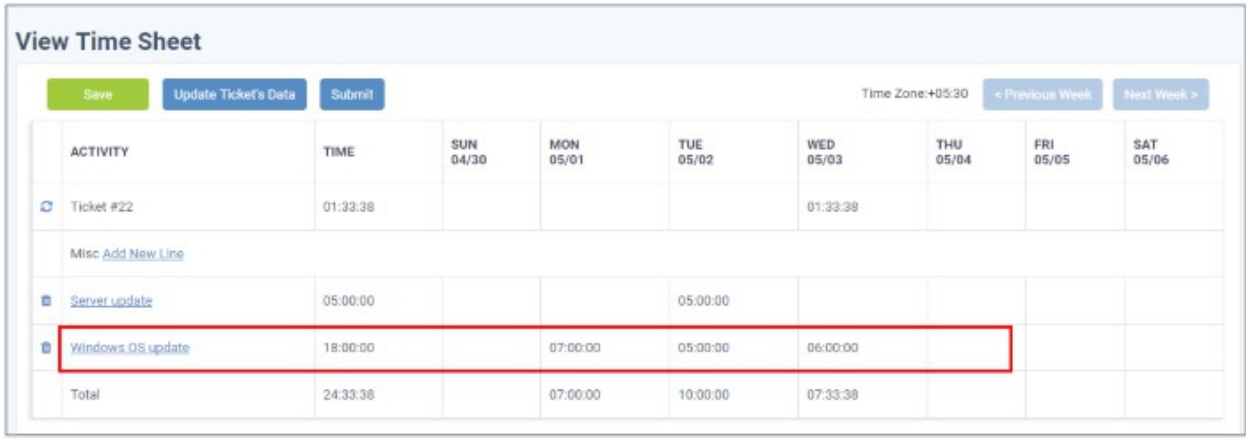
The 'Time Sheet Entry' dialog will appear.

- Enter the name of the Activity in the Activity field
- Enter the time spent on the activity on a day, by clicking inside the field below the day and selecting the hours, minutes and seconds from respective sliders.



- Click 'Done'.
- Repeat adding the time for each day you worked on the same activity
- Click 'OK' in the 'Time Sheet Entry' dialog.

The activity will be added to the list.



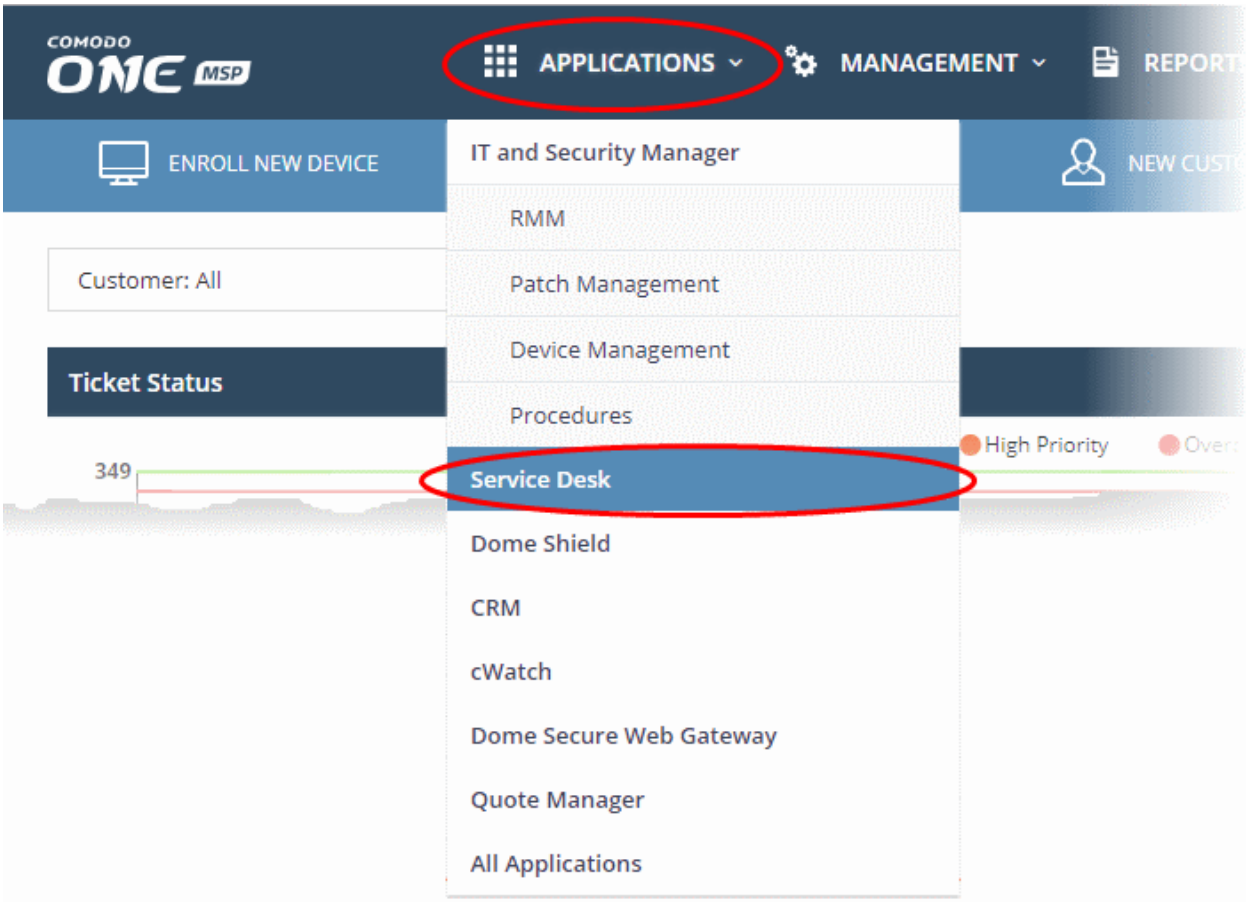
- Click 'Save' for your changes to take effect

You can update the activity at any time by clicking on it.

- To remove an activity, click the trash can icon beside it.
- To submit the sheet for administrator approval, click the 'Submit' button from the top

1.2 Login to the Service Desk Module

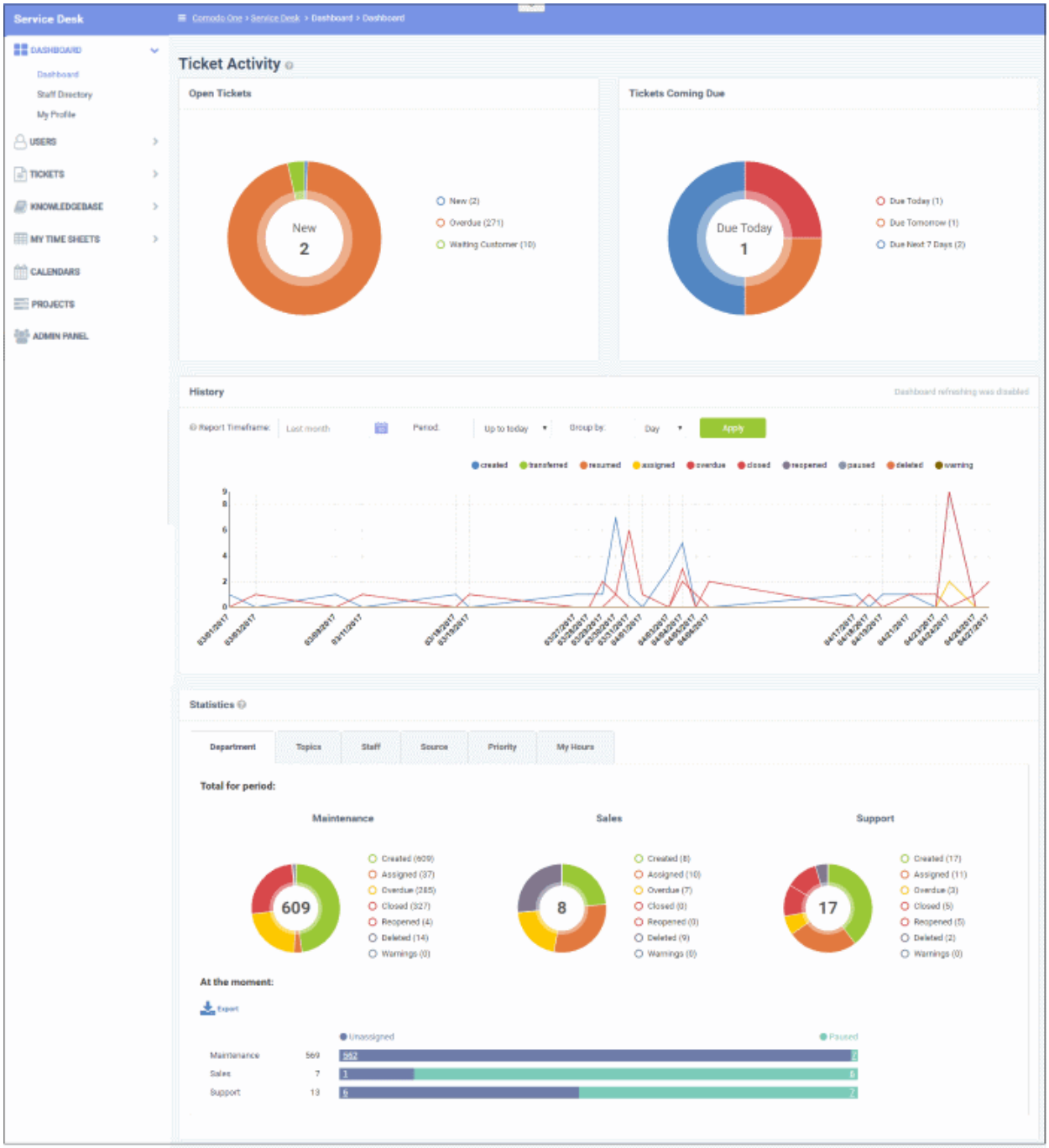
- First, login to Comodo One (C1) at **https://one.comodo.com/app/login**
- Click 'Applications' > 'Service Desk' in the C1 interface:



- Two factor authentication - Admins with appropriate privileges can setup two factor-authentication for their users.
  - Click 'Management' > 'Account' > 'Account Security Details' to do this.
  - See **Setting up Two-Factor Login Authentication** in the C1 admin guide if you need more help.

2 Service Desk Staff Panel

- The 'Staff Panel' allows staff (aka 'agents') to manage their tickets, create new users, edit organizations, manage knowledge-base items, manage projects and update their time sheets.
- Staff members are enrolled by administrators. The permissions of a staff member are determined by the role to which they are assigned ('Admin Panel' > 'Staff' > 'Roles') and the department to which they belong 'Admin Panel' > 'Staff' > 'Departments').
- Staff Members that are given admin permissions can also access the admin panel.



Staff can navigate to different areas of the console by clicking the links on the left of the interface. Tool tips offering guidance are available for most features.

Main Functional Areas

- **Dashboard** - Allows staff to view a graphical summary of ticket activity, including their assigned, closed and due tickets. Tickets are also sorted by department, ticket category, staff member, source and priority. See '**Staff Panel Dashboard**' for more details.
- **Users -** Allows staff to add/import users, and manage customers. The section also allows staff to assign users to customers. See **Manage Users and Customers** for more.
- **Tickets** - Allows staff to manage tickets created by users (and tickets created by staff on behalf of a user). See **Manage Tickets** for more.
- **Knowledgebase** - Allows staff to create FAQs that can be hosted on your support portal. Staff can also create canned responses to common questions which can be quickly pasted into a ticket. See **Manage Knowledgebase** for more.

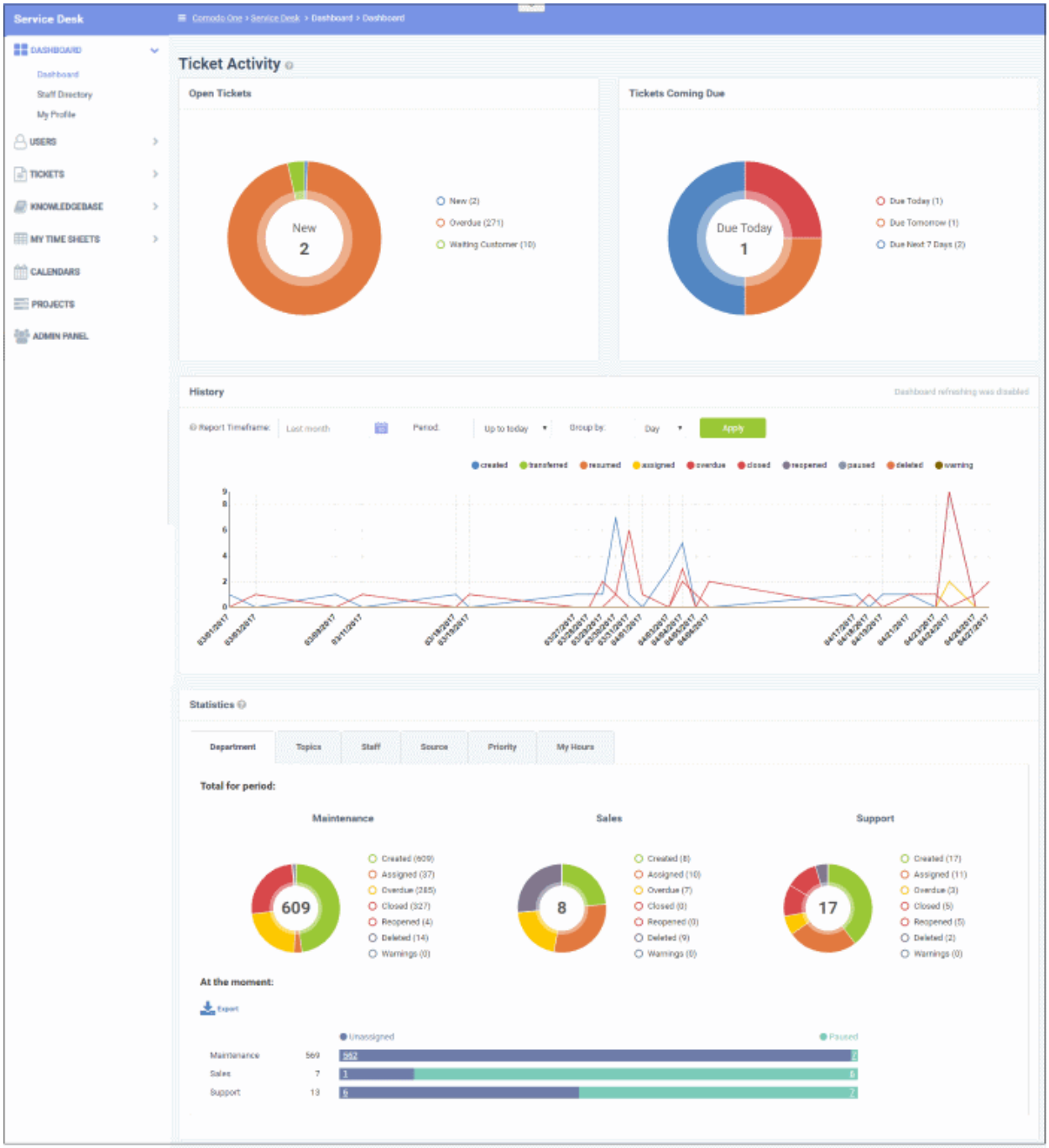
- **My Time Sheets** - Create and update your time sheets and submit them to administrators for approval. Time sheets allow admins to evaluate staff performance and track their working hours. See **Manage Staff Time Sheets** more details.
- **Calendars** - Create appointments. Appointments can be be shared with and tracked by other staff members. See '**Manage Calendars**' for more details.
- **Projects** - Create task-orientated projects which span multiple tickets, departments and agents. See **Manage Projects** for more details.

Various interfaces display a informational tool-tip beside key features. Click the tool-tip to view quick help on the feature.

2.1 Staff Panel Dashboard

The staff panel dashboard contains three areas:

- **Dashboard** - Provides a graphical summary of ticket activities and related statistics.
- **Staff Directory** - Displays the names of staff enrolled into Service Desk.
- **My Profile** - Allows the currently logged-in staff member to configure settings such as time zone, preferred language and more.



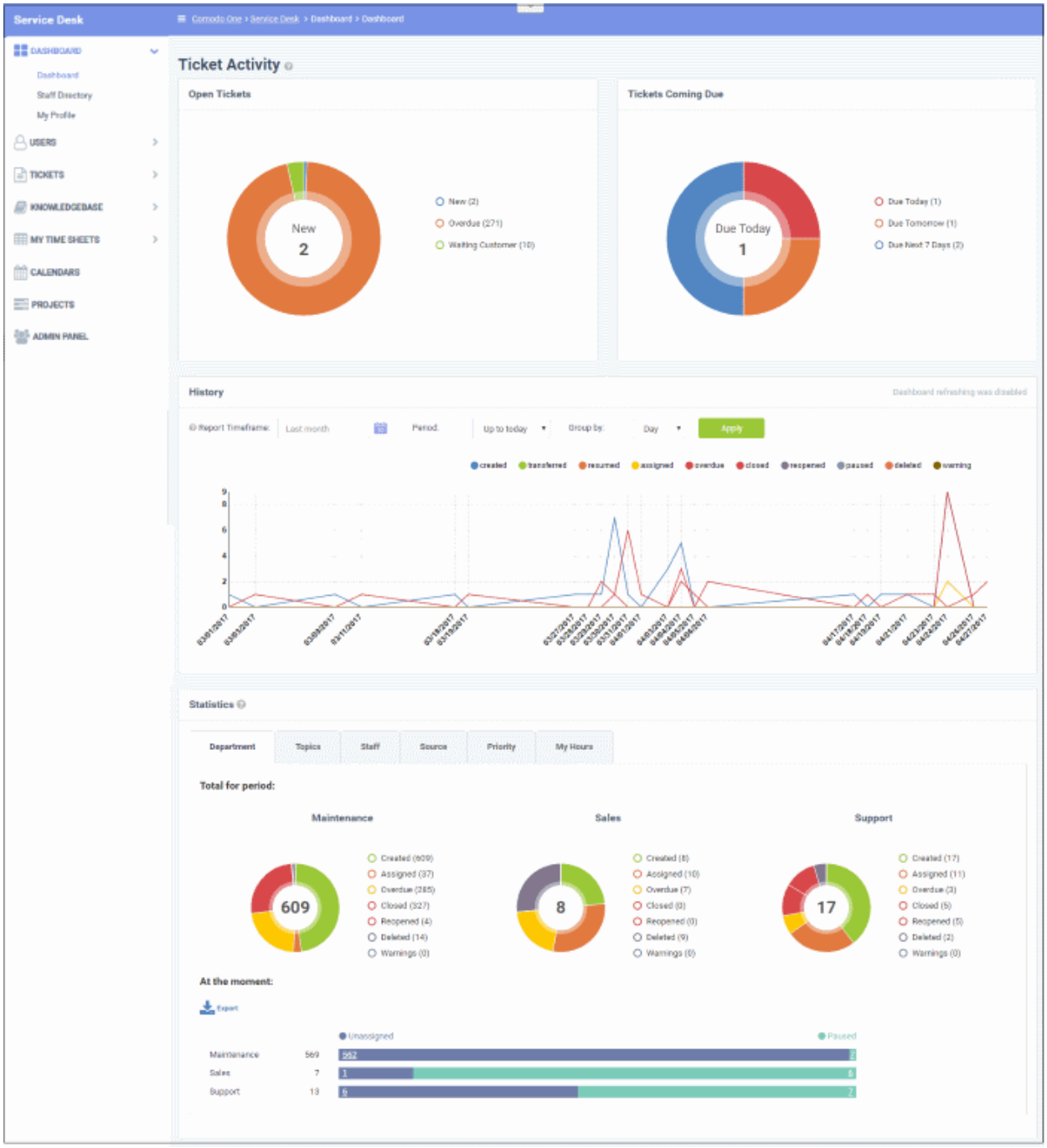
The following sections explain more about:

- **View the Dashboard and Exporting Reports**
- **View Staff Members**
- **My Profile**

2.1.1 View the Dashboard and Export Reports

- The staff dashboard is a highly informative overview of all current and recent tickets. Staff can specify the period for which statistics are shown.
- The dashboard contains statistics and charts about tickets assigned to the staff member.
- Click the 'Dashboard' tab to open this dashboard.

Ticket Activity

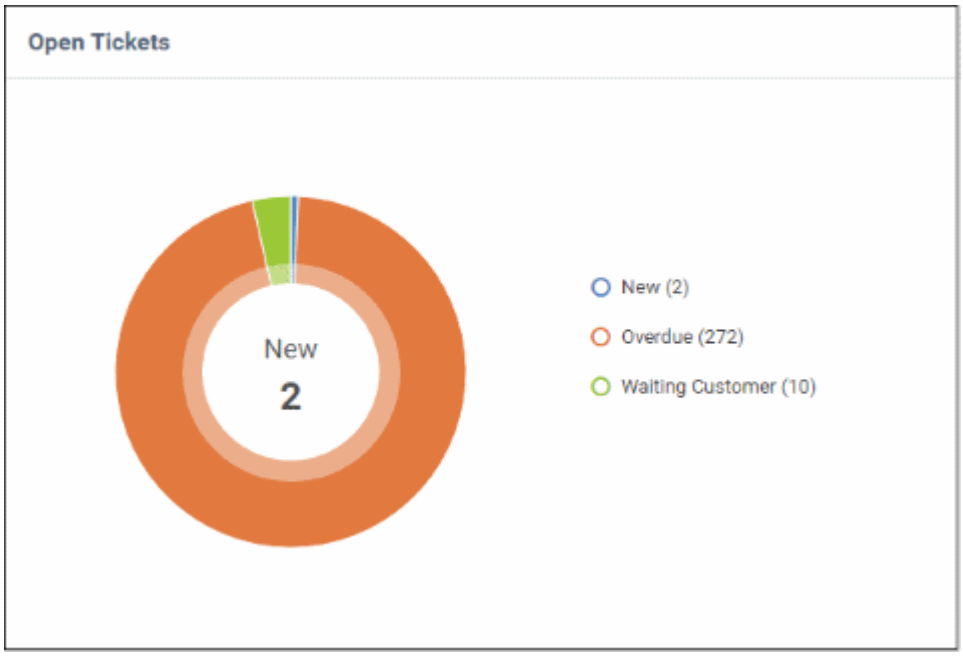


Ticket activity contains the following sections:

- Open tickets - Shows all unresolved tickets. The chart breaks these down into new tickets, overdue tickets and those which are awaiting customer response.
- Tickets coming due - Tickets approaching the deadline by which they must be resolved according to the SLA which applies to the ticket.
- History - A historical timeline which shows the number of tickets per day/week/month in various categories.
- Statistics - Pie charts showing tickets by department, ticket category, assigned staff-member, priority and more.

Open Tickets

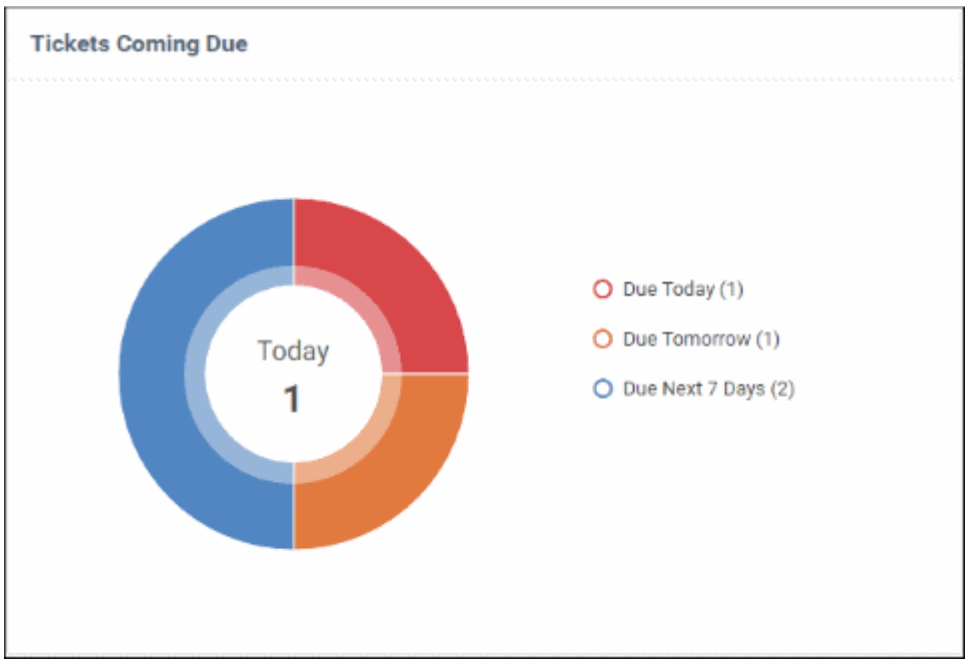
The total number of unresolved tickets. The pie chart breaks this down into tickets that are yet to be attended (new), overdue and awaiting customer response.



- Place your mouse on a sector to see the number of tickets in each category.

Tickets Coming Due

A heads up on tickets that are due in the near future:



- Place your mouse on a sector to see the number of tickets in each category.

Ticket History Graph

Line chart which shows a break-down of ticket statuses in your assigned organization over-time. For example, the chart shows how many tickets have a status of 'closed', 're-opened' or 'assigned' at various points in time. You can select which statuses are shown by clicking on the legend above the graph.

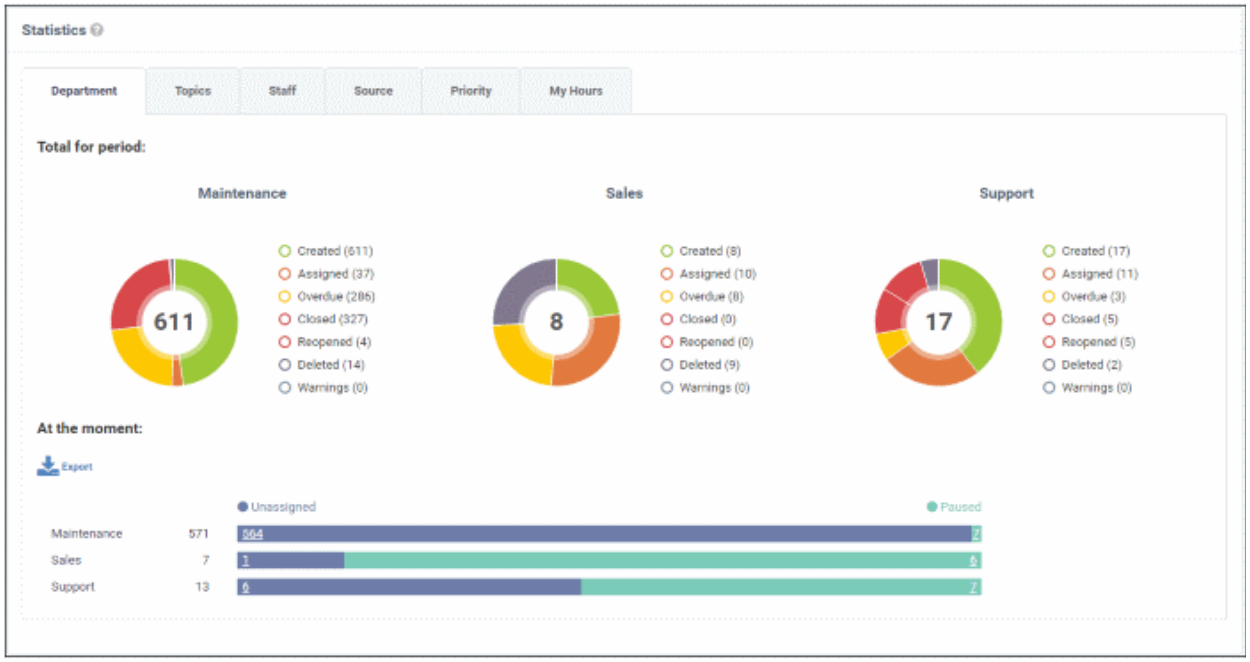
By default, the graph shows details for the previous 30 days. Use the 'Report timeframe' options to change the time-period. Click 'Refresh' to implement your changes.

- The data is refreshed and updated automatically according to the settings done in '**My Profile**'.

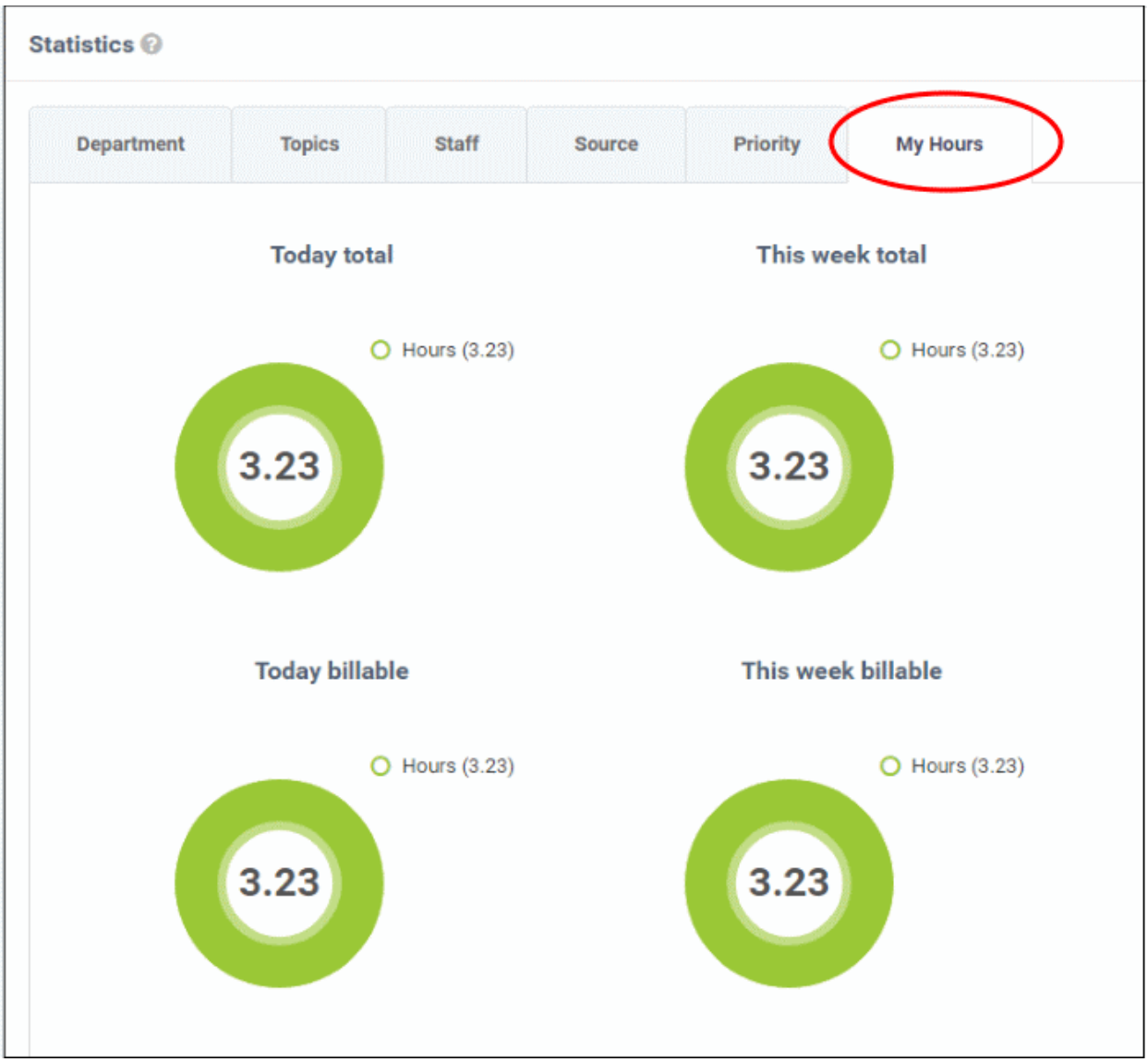
Statistics

The statistics area shows details for the entire period since you started using Service Desk. You can view statistics based on 'Department', 'Ticket Category', 'Staff', 'Ticket Generation Source' and 'Priority'.

The 'At the moment' graph at the bottom shows the number of tickets that are unassigned and paused depending on the parameter selected. For example, if 'Source' is selected, the graph will display the number of tickets that are unassigned and paused for each ticket source type. Sources include 'Email', 'Phone' and 'Other'.



- 'Overdue' - tickets that have passed the completion deadline for a particular Service Level Agreement (SLA) plan.
- 'Warnings' - tickets that are configured to trigger warnings for a particular SLA plan.
- The 'My Hours' tab shows stats on time spent on tickets by the currently logged-in staff member.



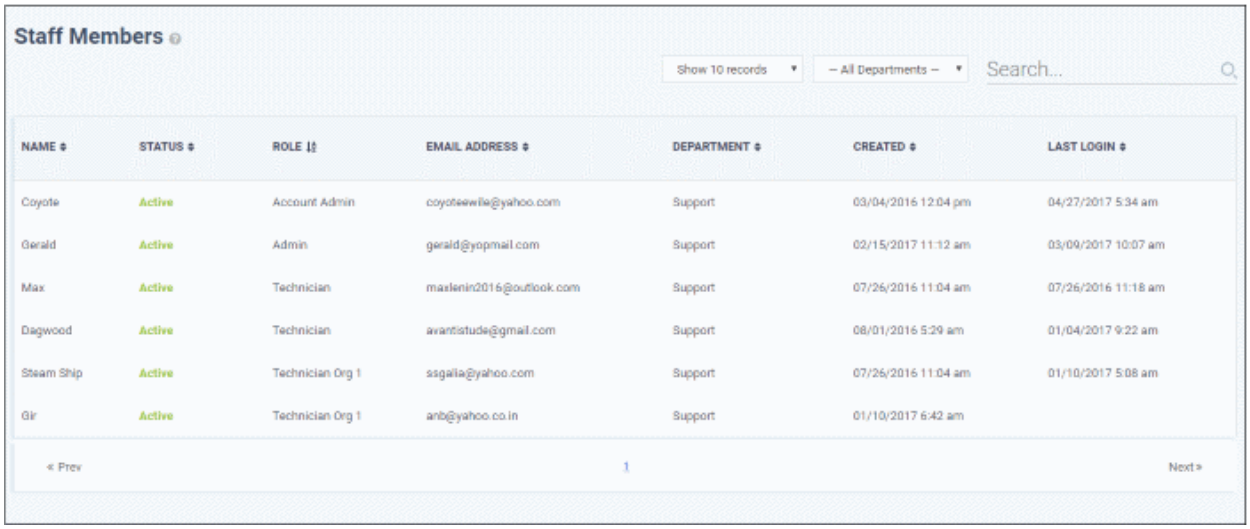
Export Statistics to a CSV file

Click the 'Export' button at the bottom of the interface to download the stats in CSV format. This file can be opened with applications such as Microsoft Excel or Open Office Calc. Please note this option is not available for 'My Hours' statistics.

2.1.2 View Staff Members

The 'Staff Members' screen lists the name, department and contact details of all staff enrolled in service desk.

- Click 'Dashboard' > 'Staff Directory' to view the staff members screen.



Sort the items

- Click a column header to sort items in ascending/descending order.
- The 'Show records' drop-down on the right allows you to select the number of entries to be displayed per page. The options range from 10 records per page up to 100. You can navigate to different pages by clicking 'Next' and 'Prev'.

Filters

- To search for staff members by department, select the department from the drop-down at the top. The matching results will be fetched automatically.
- The 'Search' field allows to filter staff members by name, role and email address. Enter the parameter fully or partly in the 'Search' field. The staff members matching your parameters will be automatically fetched. To display the list fully, clear the text in the field.

Column Headers

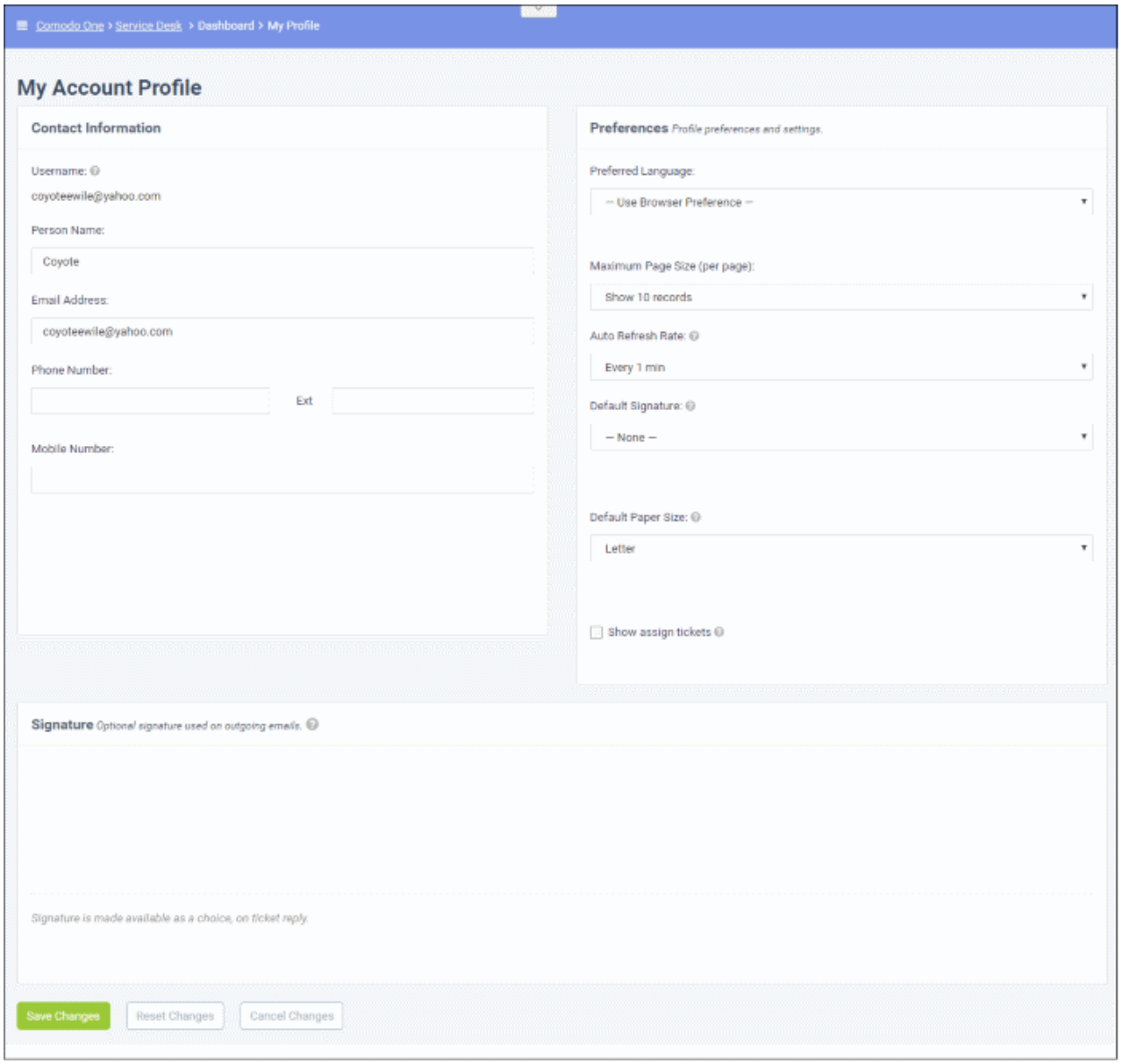
- **Name:** The name of the staff member.
- **Status:** Indicates whether the staff member is active or inactive.
- **Role:** Staff roles determine the permissions they have within the service desk console. Roles are configured by admins in 'Admin Panel' > 'Staff' > 'Roles'.
- **Email Address:** Email address of the staff member entered at the time of enrollment.
- **Department:** The department to which the staff member is assigned.
- **Created:** The date and time the member was enrolled to C1.
- **Last Login:** The date and time the member last logged into C1.

Staff details are as per the information entered during staff enrollment.

2.1.3 My Profile

'My Account Profile' allows staff to edit their name, email address, phone numbers, language, time zone and more.

- Click 'Dashboard' > 'My Profile' to open this page



Contact Information

- **Username**: The login username of the staff member. Cannot be edited
- **Person Name**: Full name of the staff member. Cannot be edited
- **Email Address**: The email address of the staff member. Cannot be edited
- **Phone Number:** Contact desk phone number of the staff member
- **Mobile Number**: Mobile phone number of the staff member

Preferences

- **Preferred Language:** Select the language which will be used in the interface.
- **Maximum Page size:** Number of records that should be shown per page. For example, the number of tickets that should be shown per page. If 'system default' is selected, then the settings chosen by the administrator will take effect.
- **Auto Refresh Rate**: Configure how frequently ticket statuses and dashboards should be refreshed. If disabled, staff can manually refresh by clicking the 'Refresh' button.
- **Default Signature:** Select the signature that should be displayed in ticket response emails to customers. You can create your signature in the text field at the bottom of the page. The 'Department' signature is set

by administrators.

- **Default Paper Size:** The page size used when printing tickets to PDF. Staff members can also change the page size in the ticket print dialog screen.
- **Show Assigned Tickets:** If enabled, the staff member's name will not be displayed in tickets assigned to them. The department name will be displayed instead.

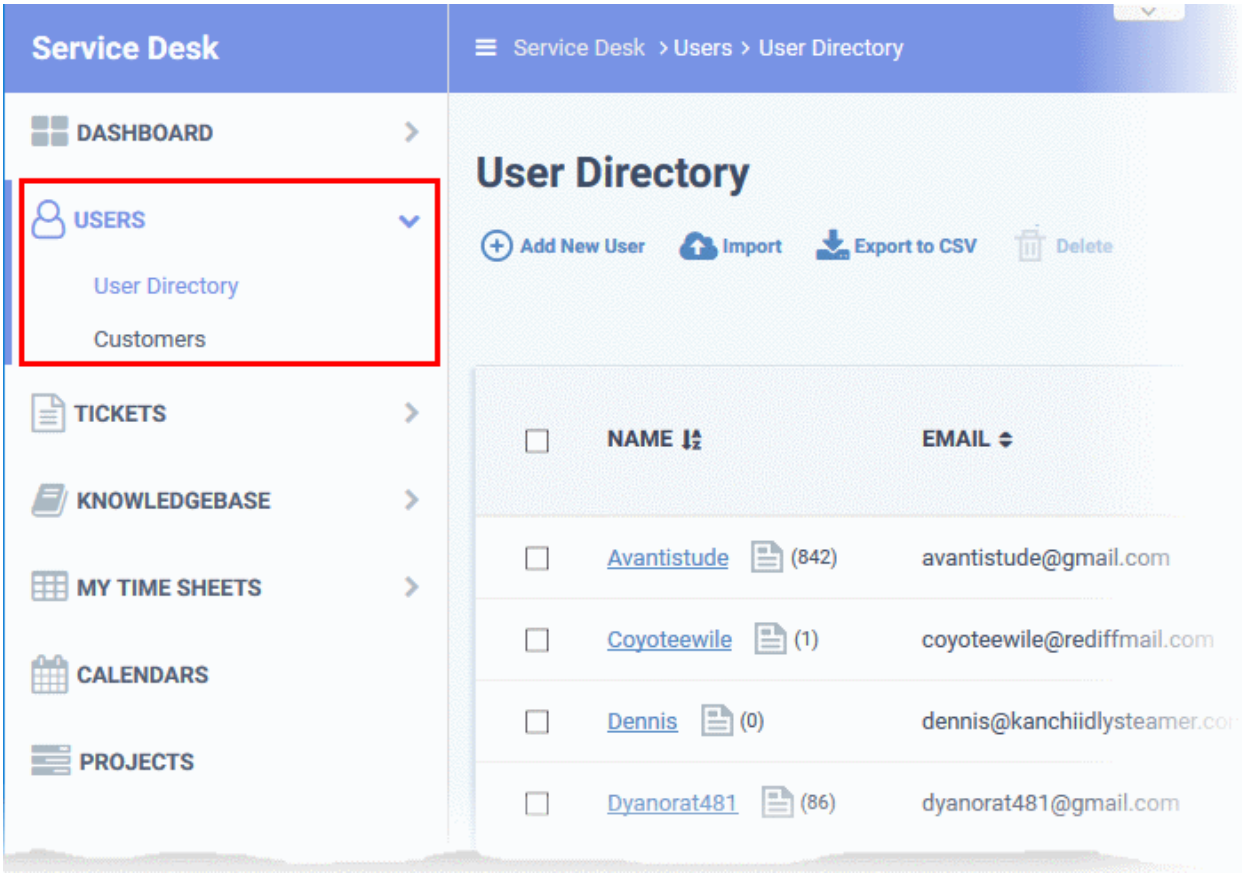
Signature

- Enter the signature that will be displayed in your ticket responses. You can choose this signature by selecting 'My Signature' in the 'Default Signature' drop-down further up this page. You also have the option to leave the signature blank or either select 'My signature' or 'Department signature' when you are actually responding to a ticket.

Click 'Save Changes' for your updates to take effect.

2.2 Manage Users and Customers

- Click 'Staff Panel' > 'Users' to open the users area
- **Users** - Individuals who submit tickets to Service Desk. Tickets can be submitted at your customer help portal or via email. Admins have the option to require registration, or to allow unregistered users (guests) to submit tickets.
- **Customers** - An organization, usually a company or business, from whom you will accept tickets. We advise you create customers in the Comodo One interface rather than in Service Desk. Such 'managed' customers will be universally available in all integrated modules (Endpoint Manager, Quote Manager etc).
- You can create service contracts with customers, and assign users to a customer to keep track of billable hours on a ticket.



Click the links below for more details:

- **Manage Users**

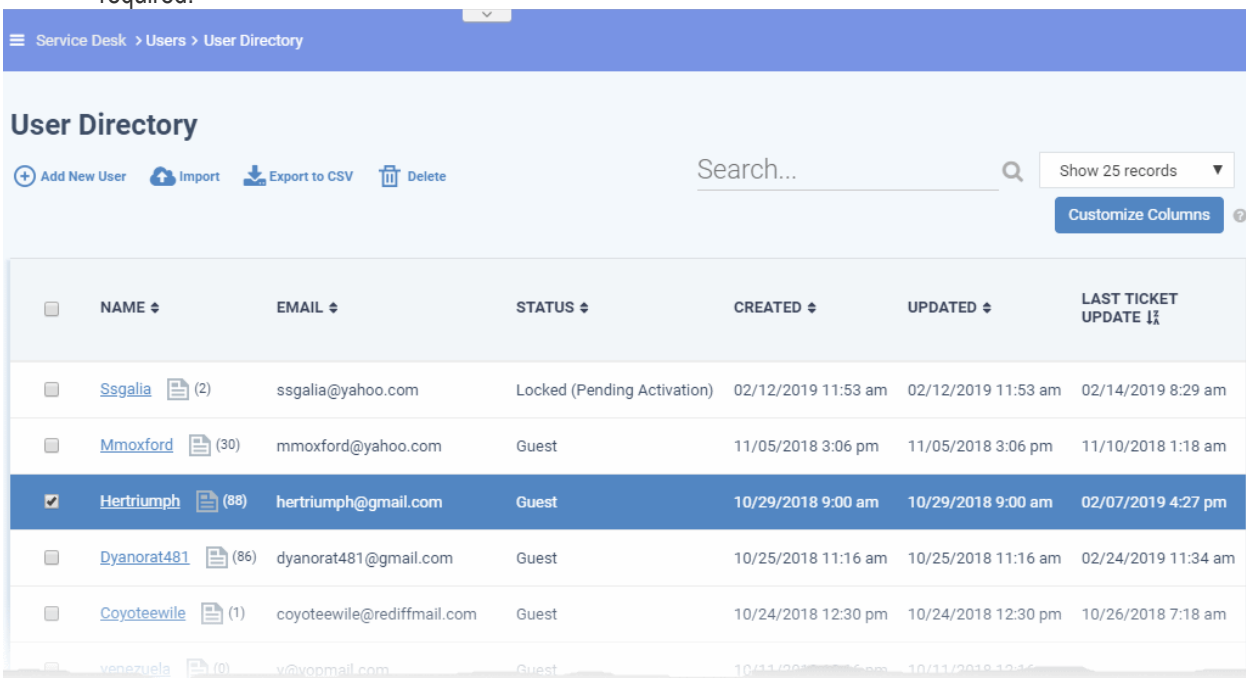
- **Manage Customers**

2.2.1 Manage Users

- Click 'Staff Panel' > 'Users' > 'User Directory'
- 'Users' are the individuals who submit tickets to your support team. They can submit tickets via your support center, by email, or direct from an Endpoint Manager device.
- The user directory area lets you add and manage users.
  - Users can be manually added to service desk or imported from .csv. You can also assign users to customers as required.
  - Admins/staff can create tickets for a new user. The new user will be automatically enrolled as a guest. Non-registered users that create tickets are also added as guests.
  - Guests must become registered if they are to login into your support portal to create tickets.
    - Admins need to enable login abilities in 'Admin Panel' > 'Settings' > 'Access Control Settings'. See **Access Control Settings** if you need help with this.
  - There are two ways you can register a user:
    - Send an enrollment email with an account activation link
    - Set a temporary password for the user to login to the support portal
    - See **Register a User** for help with this.
  - Endpoint Manager integration - Users can submit a ticket direct from a managed endpoint by right-clicking on the Endpoint Manager tray icon.
    - The device user is added as a guest if they have not already been registered. You need to manually register them if you want them to login to your portal to submit tickets.

Manage users

- 'Staff Panel' > 'Users' > 'User Directory'
- The user directory shows all registered users and guest users. Staff can add, remove and update users as required.



Staff can perform the following tasks in the user directory:

- **Add users**

- **Register a user**
- **Edit a user**
- **Delete a user**
- **Send password reset / activation email to the user**
- **Manage account access**
- **Add forms**
- **Add a user to a customer company**
- **Manage tickets raised by a user**
- **Create a new ticket on behalf of a user**
- **Export users list**

- The user directory shows basic details about each user in six columns. You can add or remove columns by clicking 'Customize Columns'. See **Modify Table Columns** if you need help with this.
- The following is a list of all possible columns:

User Directory - Table of Column Descriptions	
Column Header	**Description**
Name	The label of the user. The number beside a username shows the number of tickets they have submitted. Click on the user's name to view the tickets they have created.
Email	The email address of the user.
Status	Indicates whether the user is a registered or guest user. The relative privileges of guest and registered users can be configured in 'Admin Panel' > 'Settings' > 'Access'
Created	The date on which the user was added to Service Desk.
Updated	Date and time of the most recent update to the user's details. You can quickly view/edit user details by placing your mouse cursor over a user name.
Last Ticket Update	Date and time of the most recent update to a ticket submitted by the user.
The following columns can be added by clicking the 'Customize Columns' button. See the explanation of **Modify Table Columns** for more guidance on this.	
Customer	The company to which the user belongs.
Phone Number	The contact phone number of the user as registered with service desk
Internal Notes	Comments about the user as entered by the administrators/staff while adding or editing the user, for internal reference.

Add users

- Users can be added manually or imported from a list
- A non-registered user that raises a ticket is added as a guest.
- You can create support tickets on behalf of new users. These users are also added as guests.
- Guests can become registered users by activating their account. Only registered users can login to your support portal to manage/create tickets.
- Endpoint Manager (EM) users can submit a ticket direct from a managed endpoint by right-clicking the EM tray icon. If not already registered, the device user is added as a guest in Service Desk. You should manually register their account to allow them to manage their tickets in your web portal. See **Register a User** for more details.

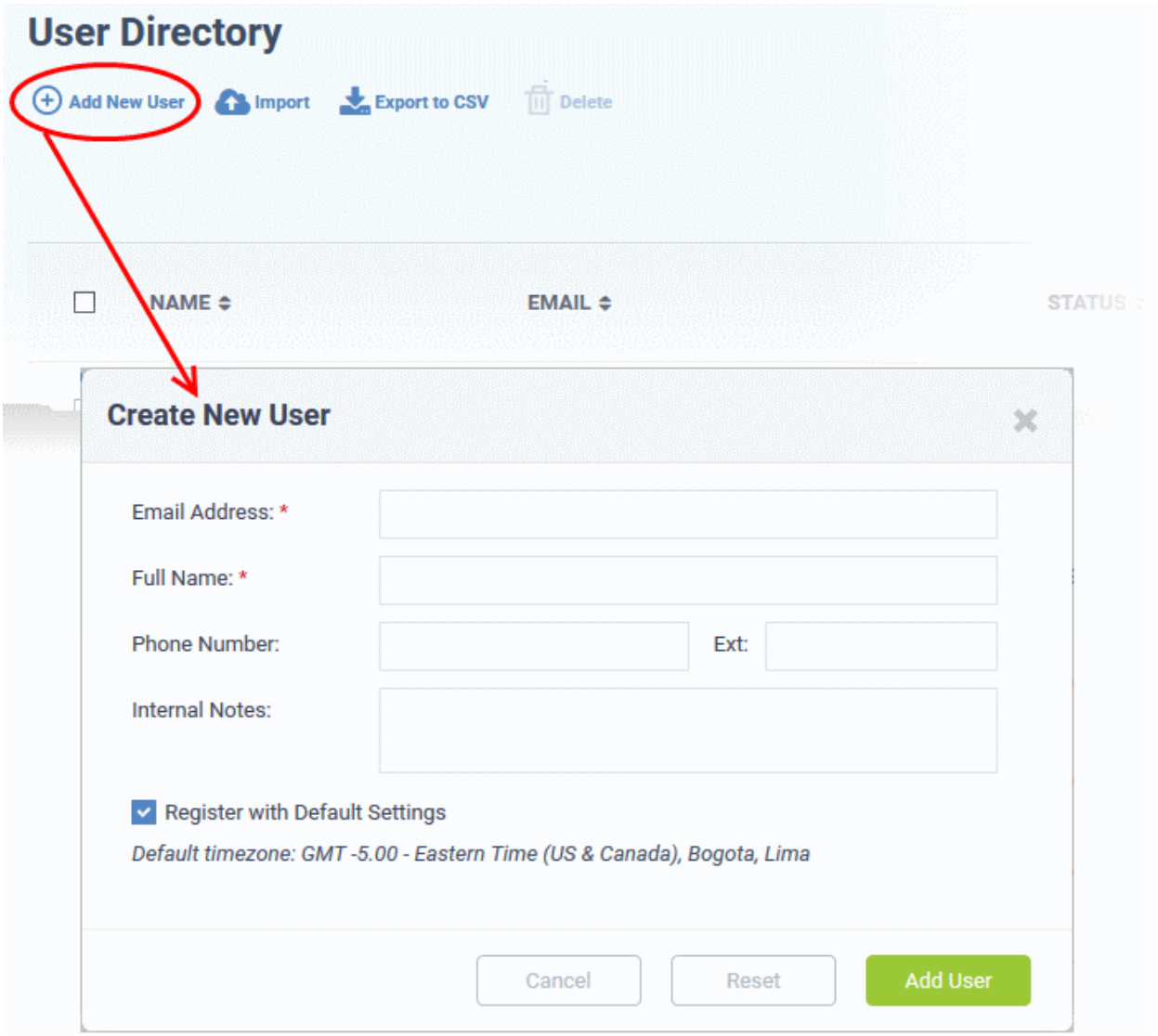
- Admins can configure the privileges of guest and registered members in 'Admin Panel' > 'Settings' > 'Access'
- Once added to service desk, users can be assigned to one of your customers in the 'Customers' screen.

The following sections describes how to add users from the 'User Directory' screen:

- **Manually add a user**
- **Import users from a CSV file**

Manually add a user

- Click 'Users' > 'User Directory'
- Click the 'Add New User' link at the top

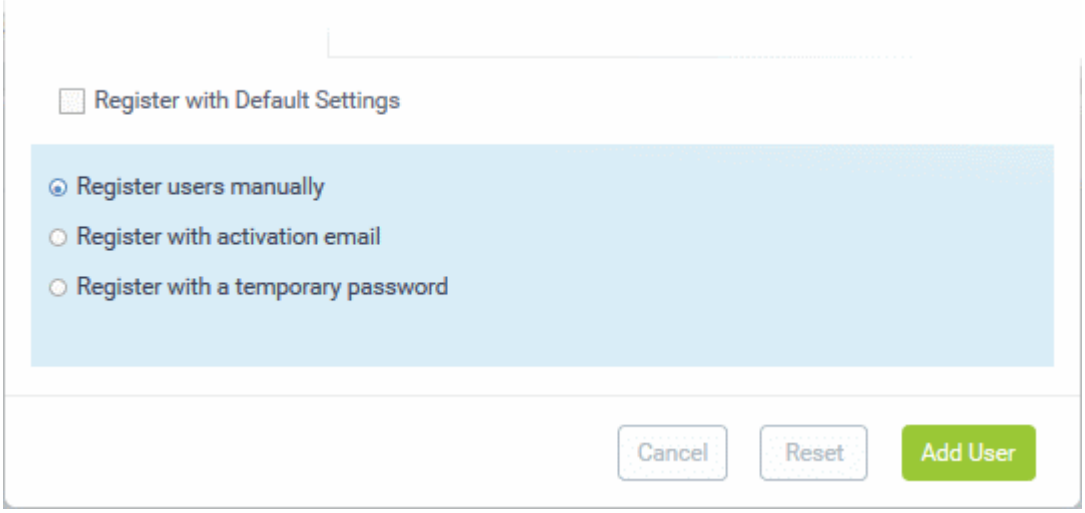


The 'Create New User' screen will open:

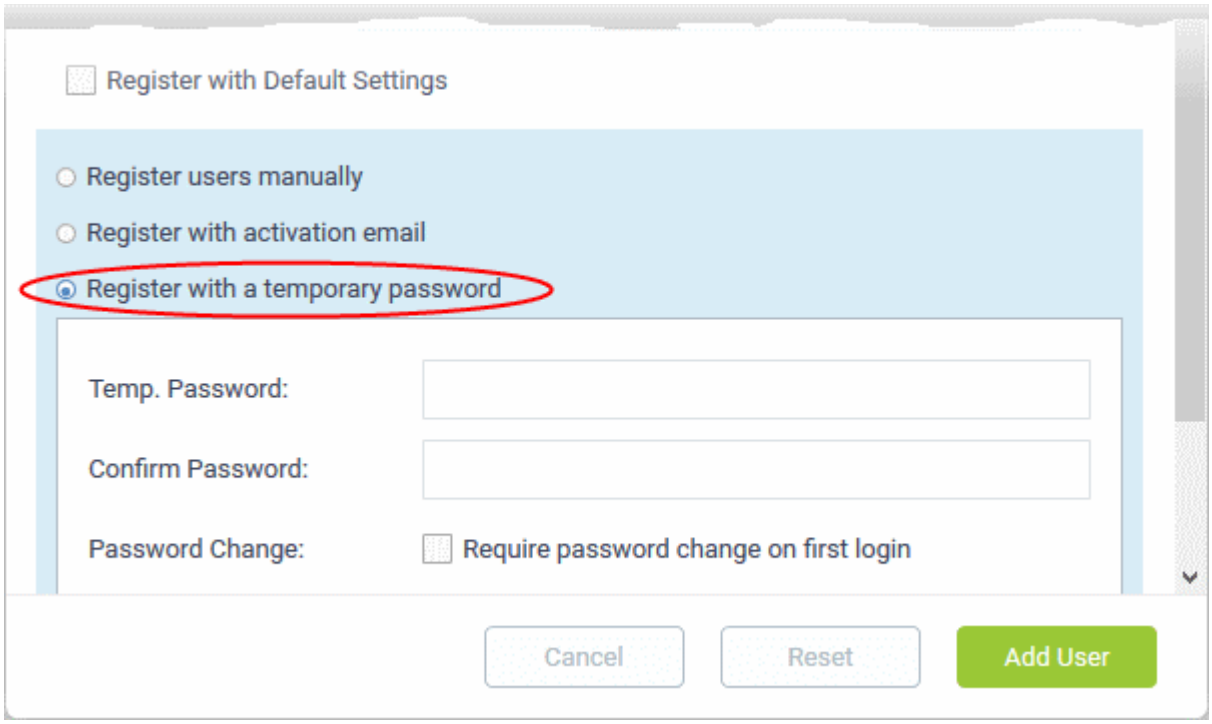
The fields available in the form shown above are fetched from the built-in contact information. Contact information can be configured in 'Admin Panel' > 'Manage' > 'Forms' > 'Contact Information'. See '**Forms**' in Service Desk admin guide if you need more details on this.

- **Email Address**: The mail address of the user. The user can login to the your support web portal using the email address as username, after registration.
- **Full Name**: The first name and last name of the user.
- **Phone Number**: The contact number of the user.

- **Internal Notes**: Enter any comments regarding the user.
- **Register with Default Settings**: Select whether the registration should use the settings in 'Admin Panel' > 'Settings' > 'Users'
  - Admins can configure how new user accounts are to be registered from the Admin Panel > Settings > Users interface. See **User Registration Settings** in Service Desk admin guide for more details.
  - Leave selected if you want to use the default settings.
  - Deselect to choose a different registration method.



  - **Register users manually** - The user is initially added a guest and needs to be manually registered afterwards. You can register a guest as follows:
    - Click 'Users' > 'User Directory' > click on the name of the guest > Click the 'Register' button
    - See **Register a user** for more details.
  - **Register with activation email** - The user is initially added as a guest and sent a mail which contains a link to register their account.
    The link leads to your support web portal where the user will create a password and so register their account. After registration, the user can login and manage/view their tickets.
  - **Register with a temporary password** - Create a temporary account password which registers the user immediately.
    You need to send the password and URL of your support portal to the user. This allows them to login and manage their tickets.
    - '*Require password change on first login*' - Enable to force the user to create a new password after first login (recommended):

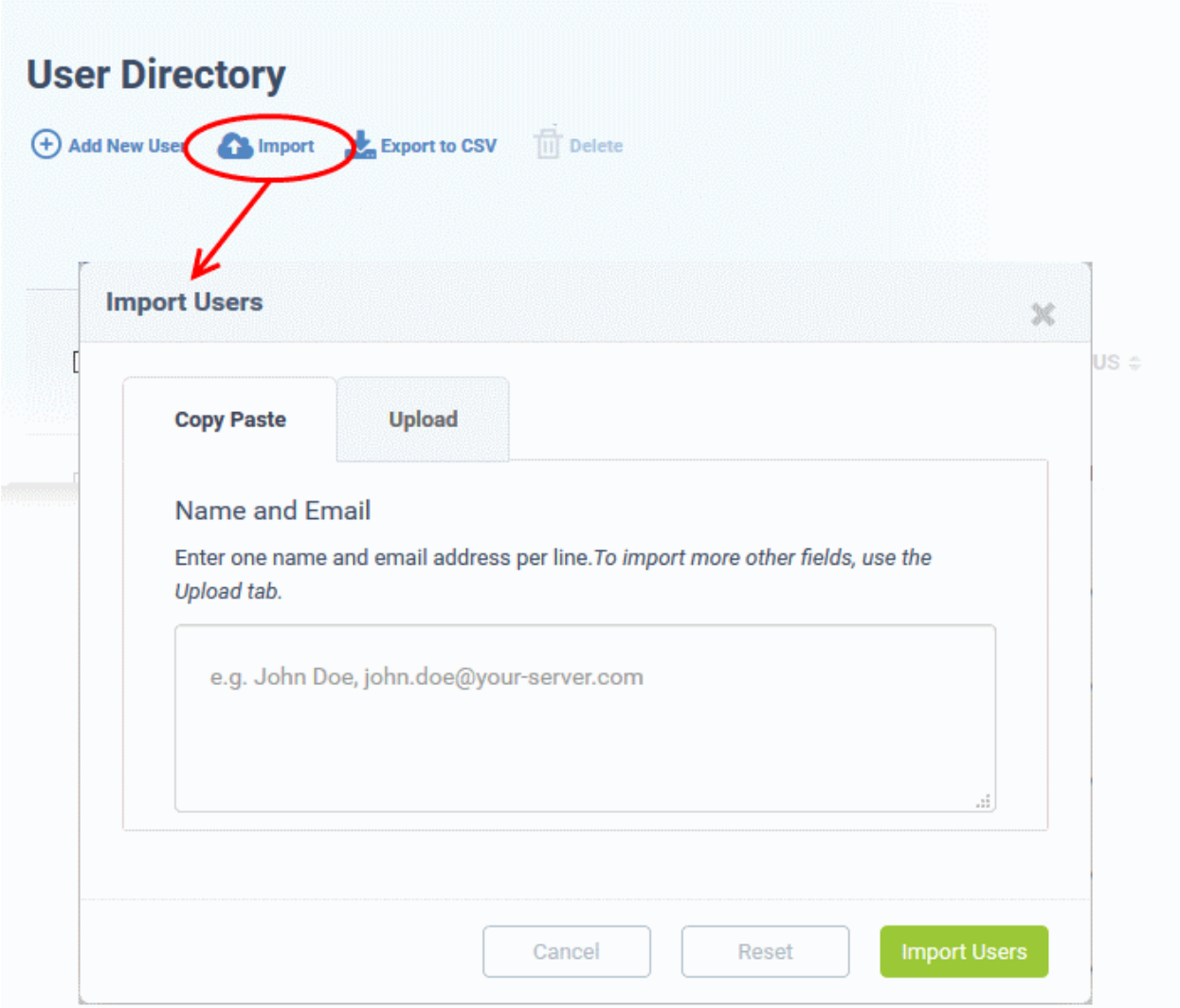


- Click 'Add User'.

The user is added as a guest or registered user depending on your selection above. After a user is registered, you can manage their account and assign them to a customer company.

Import users

- Click 'Users' > 'User Directory'
- Click 'Import' at the top

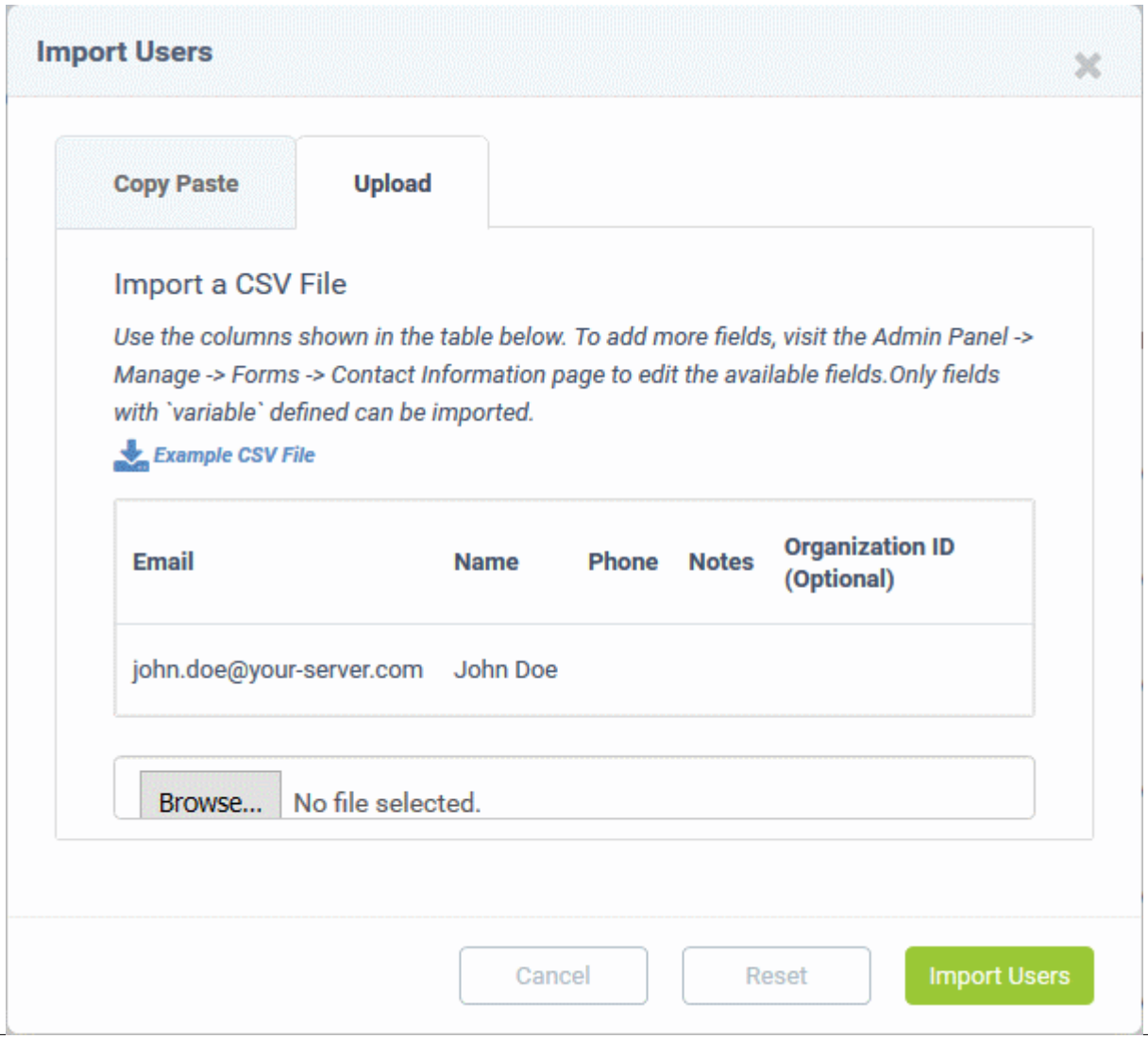


There are two ways to import users:

1. **Copy Paste** - Import users with name and email address only.
   - Enter the user's full name, followed by a comma, then their email address.
   - Add more users in subsequent lines.
   - Click Import Users' to add the users as guests.
2. **Upload** - Import users from a .csv file. More details can be added about a user with this method.
   - Create a .csv file of users that you want to import. The file should have the following column headers:

     Email,Name,Phone,Notes,"Customer ID (Optional)

   - Each line should contain the contact information of a single user
   - Save the .csv, then click 'Browse' to upload the file to Service Desk:



Tip: Click 'Example CSV File' to download a sample file.

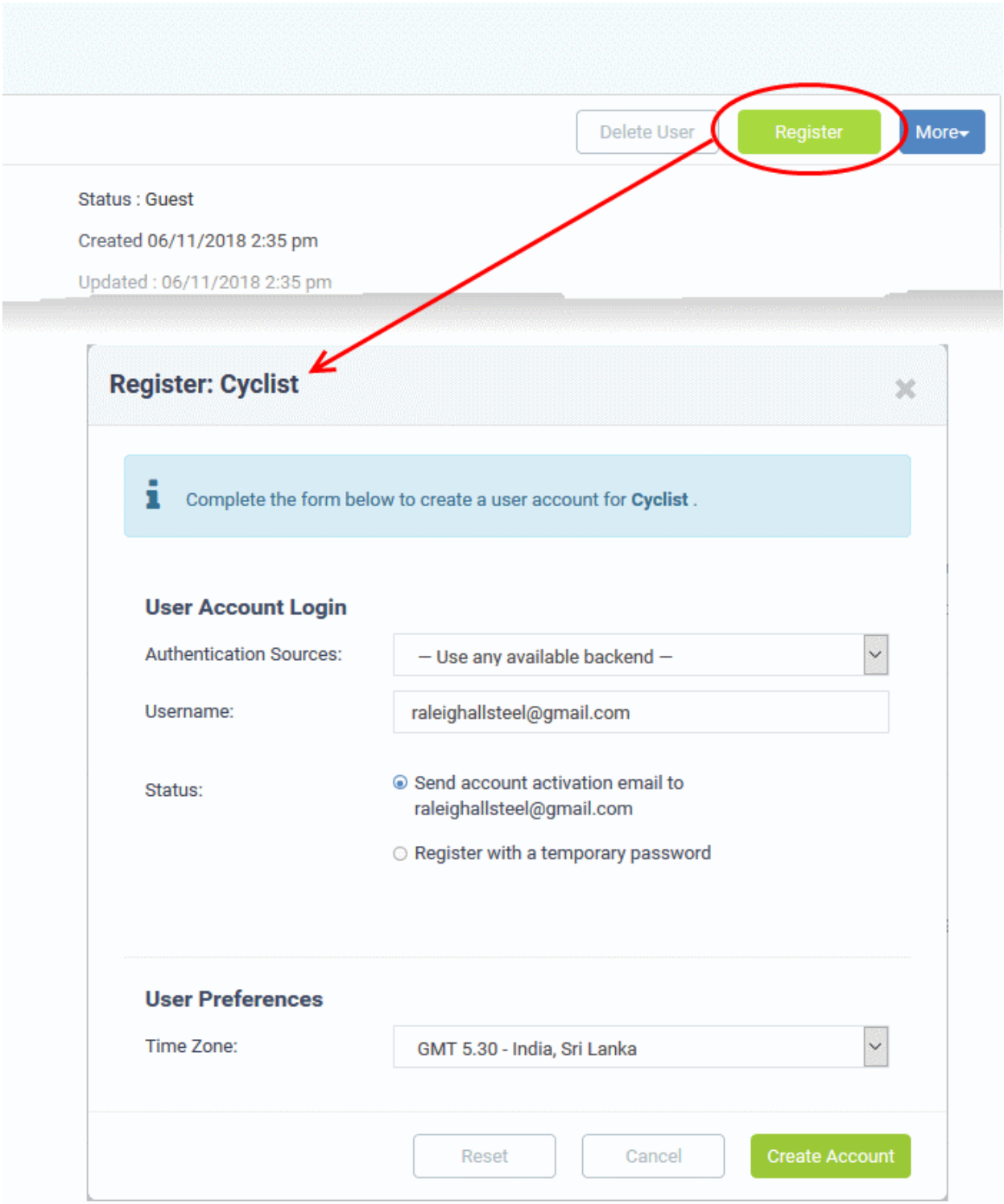
- Depending on your settings, imported users will be added as guests, or their account activation started.
  - Admins can configure default registration settings in 'Admin Panel' > 'Settings' > 'Users'. See **User Registration Settings** in Service Desk admin guide if you need further help with this.
- Admins can add more fields to the upload tab in 'Admin Panel' > 'Manage' > 'Forms' > 'Contact Information'. See '**Forms**' in Service Desk admin guide if you need more details on this.

Register a user

Guests can be registered by staff in the 'User Details' screen. Users can also register by themselves by signing up for an account at your support center page.

Register a guest user

- Click 'Users' > 'User Directory'
- Click on the name of the guest user that you want to register
- Click the 'Register' button



The user registration screen will open:

- Complete all required fields then click the 'Create Account' button. The account will be created with the status 'Locked (Pending Activation)'. The account needs to be activated for the user to access the portal and create support tickets.

  Activation can be done in two ways:

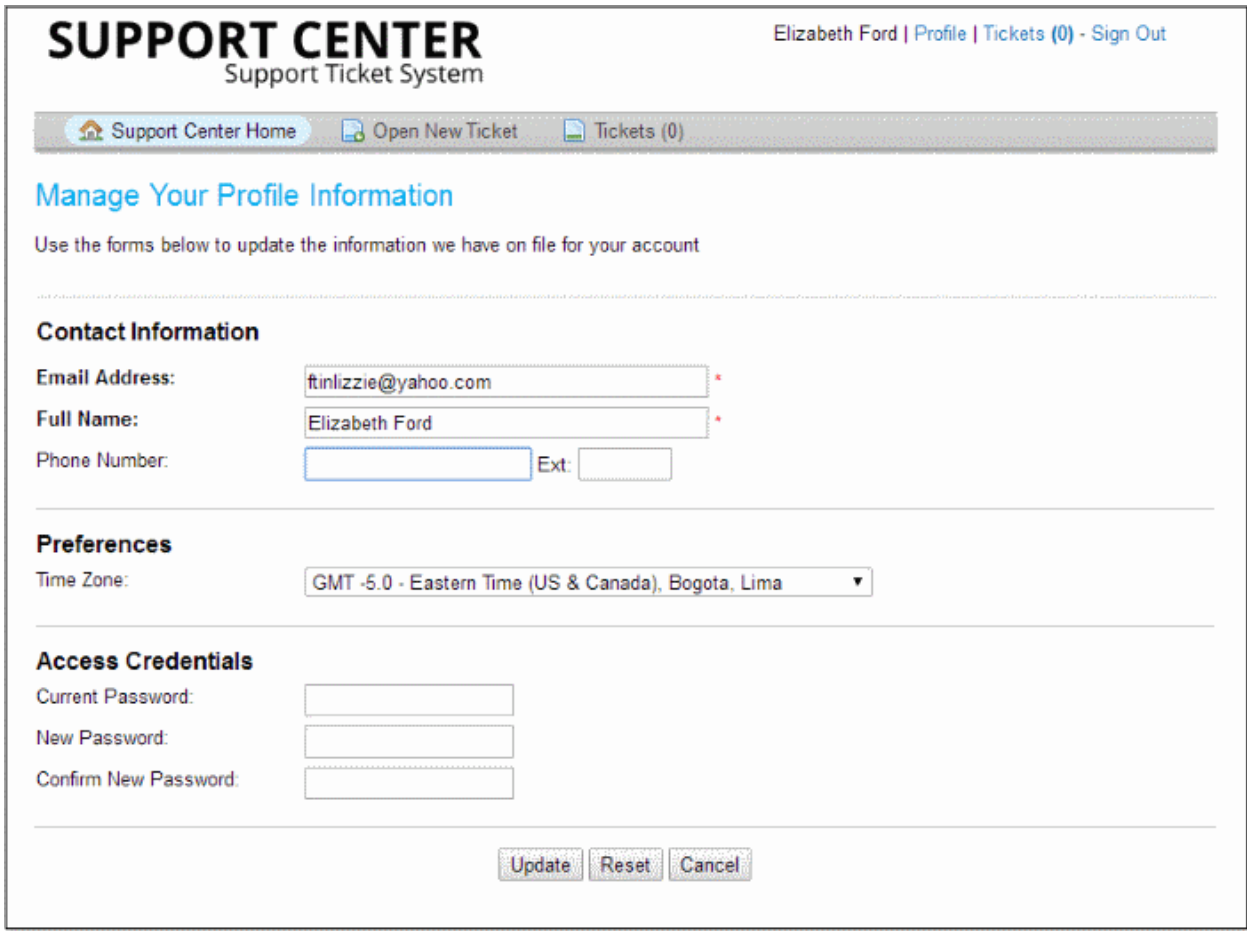
  - **Through an activation email**
  - **Using a temporary password**

User Account Activation through Activation Email

- Select 'Send account activation email...'

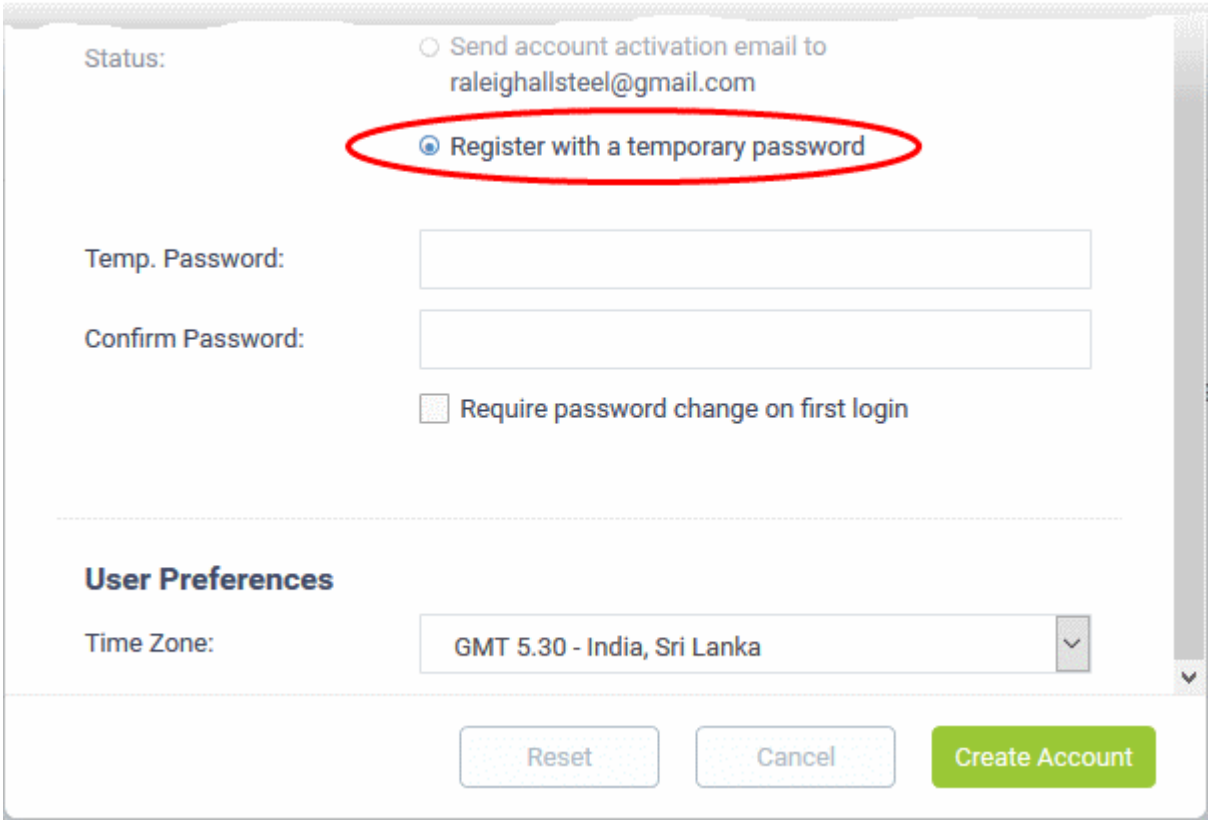
- Select the time zone to which the user belongs
- Click 'Create Account'

  The user will be added with the status Locked (Pending). An activation email will be sent to the user. After clicking the activation link in the mail, the user will be asked to configure his/her password. Once activation is complete, their status will change to 'Active (Registered)'.



User Account Activation using a temporary password

- Select 'Register with a temporary password'



- Enter a temporary password and re-enter it in the respective fields
- Select 'Require password change on first login' if you want the user to reset their password on their first login
- **Timezone** - Select the time zone to which the user belongs

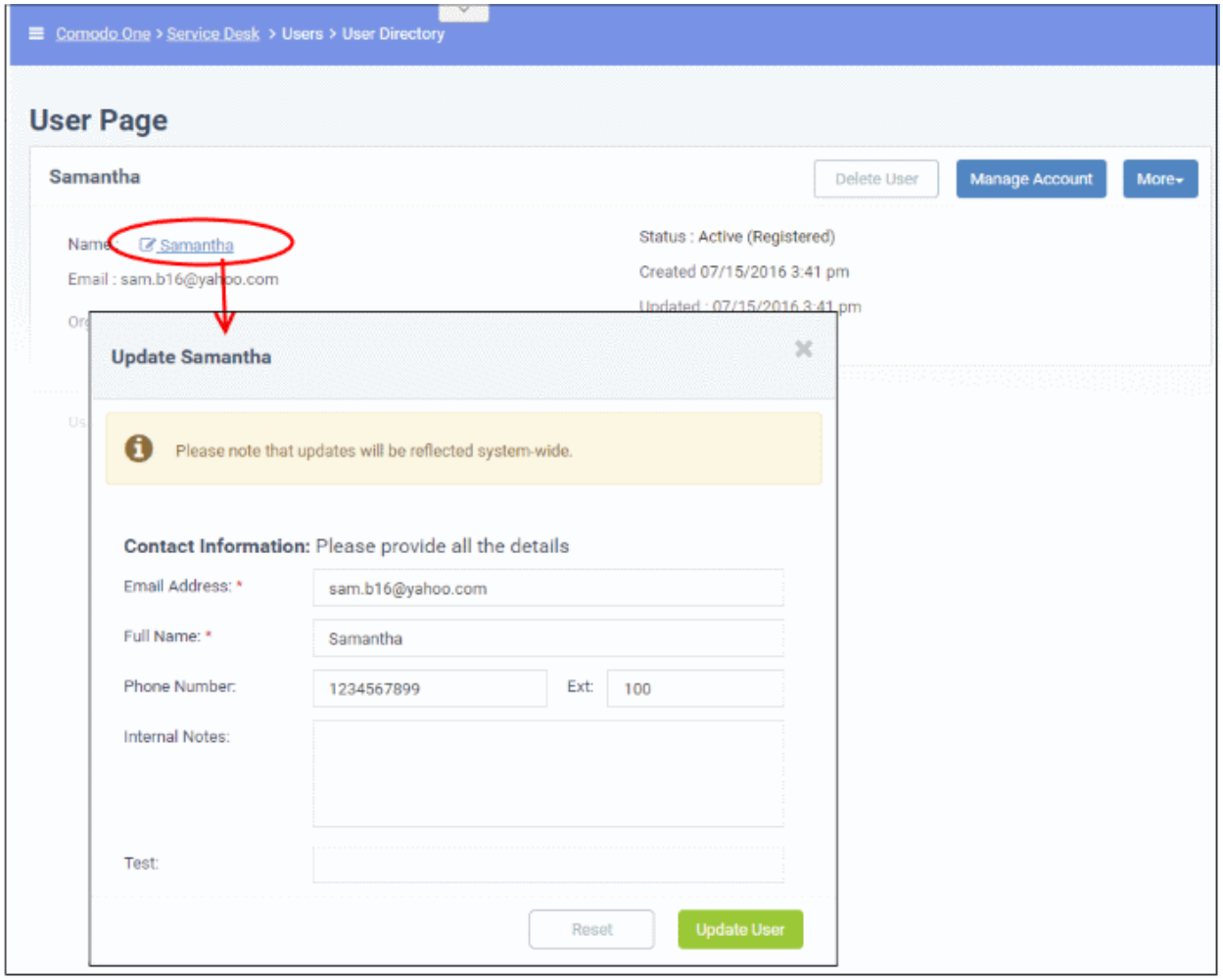
- Click 'Create Account'

The user will be registered. You should communicate the URL of your web-portal and the password to the user. The user can login to the portal using their email as user name and the password you sent. If 'Require password change on first login' is enabled, the user will be asked to change the password on his/her first login.

Tip: Your Service Desk web portal can be accessed through the URL <your_subdomain_name>.servicedesk.comodo.com.

Edit a user

- Click 'Users' > 'User Directory'
- Click the name of the user:



The 'Update User' screen will be displayed.

- Edit details as required and click the 'Update User' button.

Note: You can also add internal notes about the user in the 'Update User' dialog.

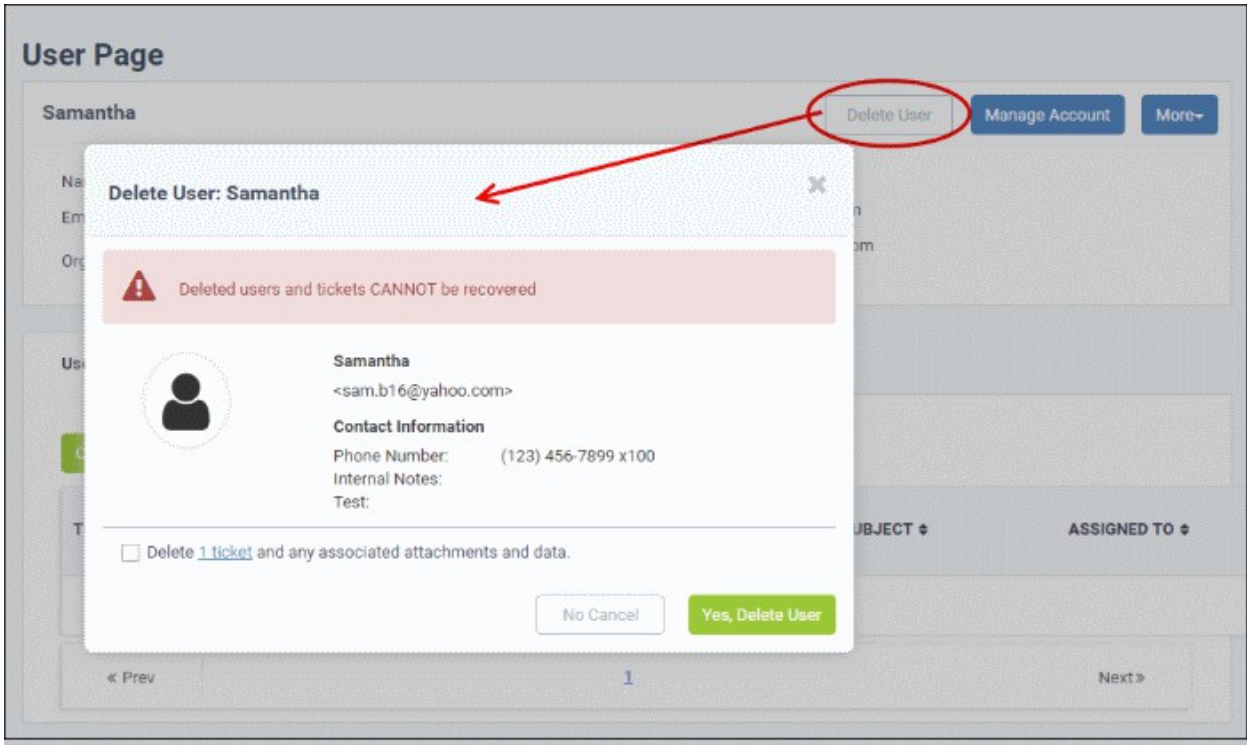
Delete a user

You can remove users associated with an organization at anytime. Once a user has been removed, you have the option to reassign their tickets to other users or to delete them from service desk.

Tip: Tickets added to the knowledgebase will not be removed.

- To remove a user, click their name then click 'Delete User' in the 'User Details' screen.
  - The confirmation dialog gives you the option to remove the tickets associated with the user.
  - Click the '<NN> tickets' link in the confirmation dialog to reassign their tickets to a different user before removing them. For more details, see **explanation of reassigning tickets** in **Ticket Details**.

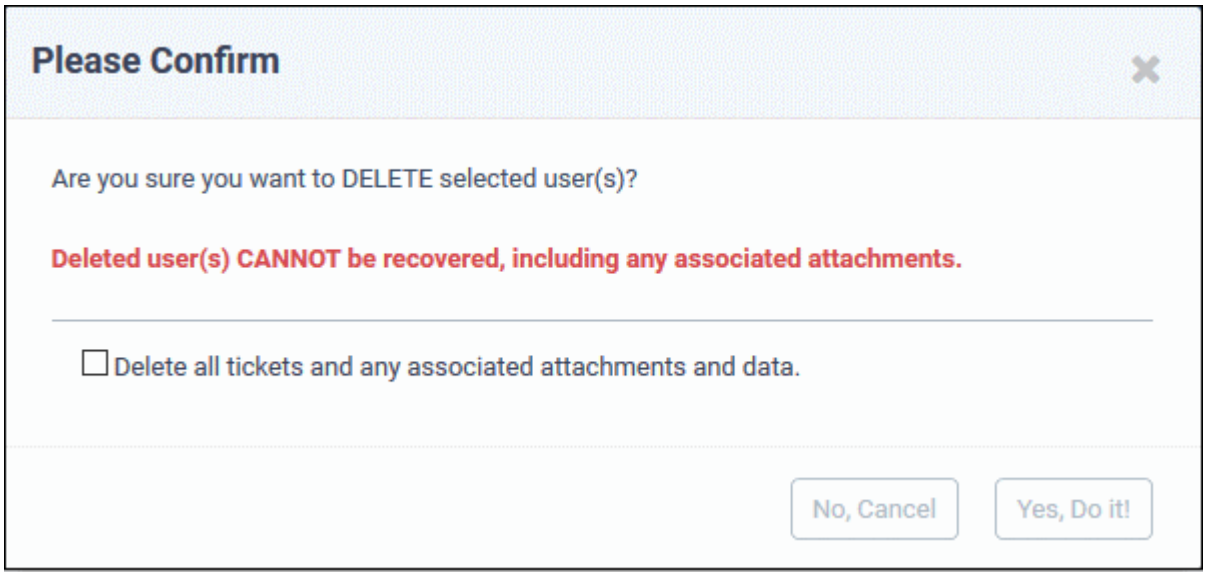
Note: You cannot remove a user who still has tickets associated with them.



- Click 'Yes, Delete User'

Deleted users cannot be 'restored'. If required, you can re-create the user by creating a new user account.

- To delete multiple users, select the check-boxes beside them in the 'User Directory' interface and click the 'Delete' button at the top.



- Click 'Yes, Do it!' to confirm the deletion.
- 'Delete all tickets and any associated attachments and data' - Enable this if you also want to remove any tickets created by the user

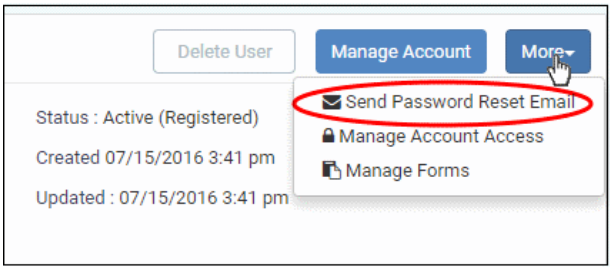
Send password reset / activation email to the user

The 'More' drop-down lets you reset passwords for active users and send activation emails to unregistered users.

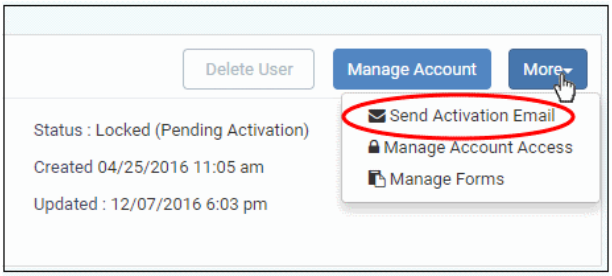
- Click 'Staff Panel' (if required) > 'Users' > 'User Directory'

- Click the name of the user whose password you wish to reset/to whom you wish to send an activation mail
- Click the 'More' button on the upper-right of the user details screen:

Registered Users

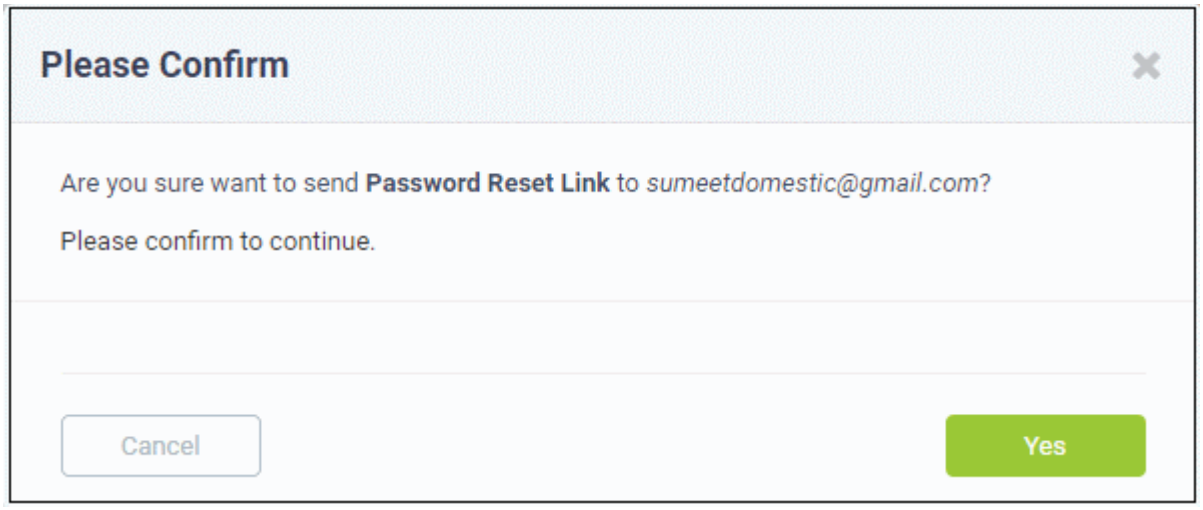


Locked (Pending Activation) Users



To reset a password

- Click the 'Send Password Reset Email' link

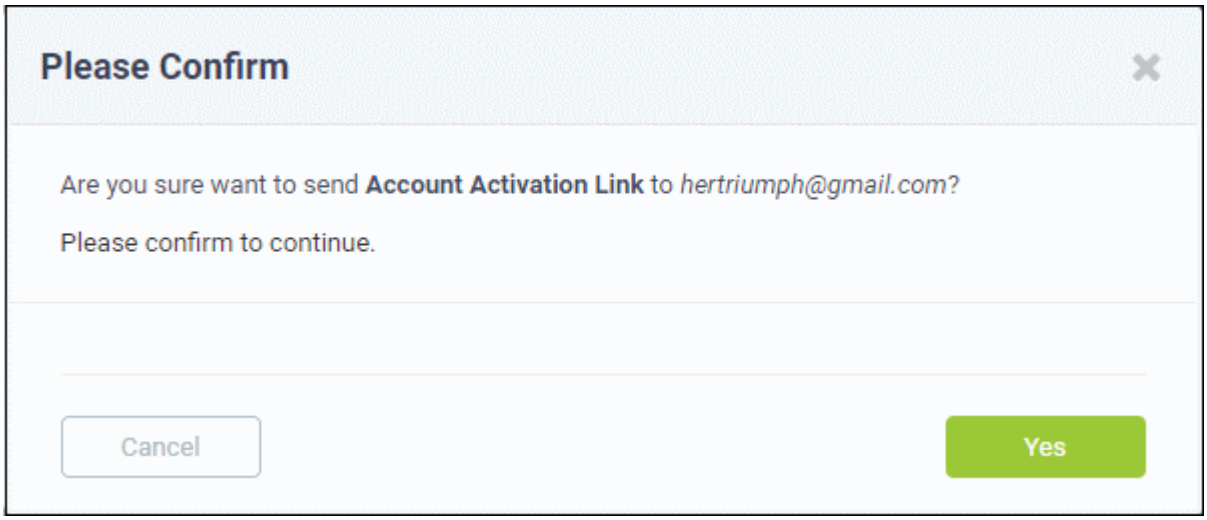


- Click 'OK' to confirm sending the password reset email to the user.

An email containing the password reset link will be sent to the user. The user has to click the link then enter their registered email address in the 'Forgot My Password' page. The user can reset his/her password In the 'Manage Your Profile Information' page.

To activate a user

- Click the 'Send Password Reset Email' link



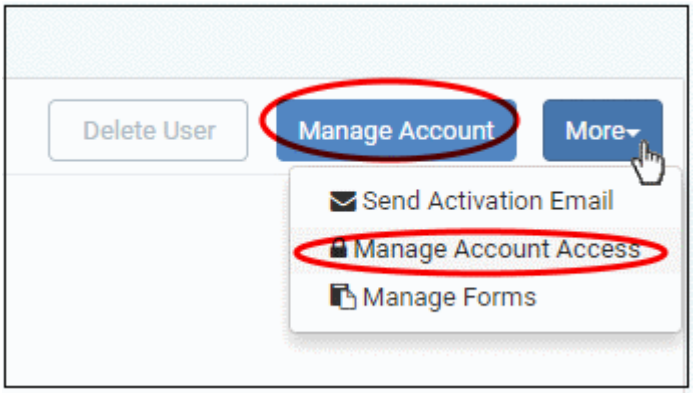
- Click 'Yes' to confirm and send the activation mail.

An activation email will be sent to the user. After clicking the activation link, the user can configure their password in the 'Manage Your Profile' Information page. Once activation is complete their status will change to 'Active (Registered)'.

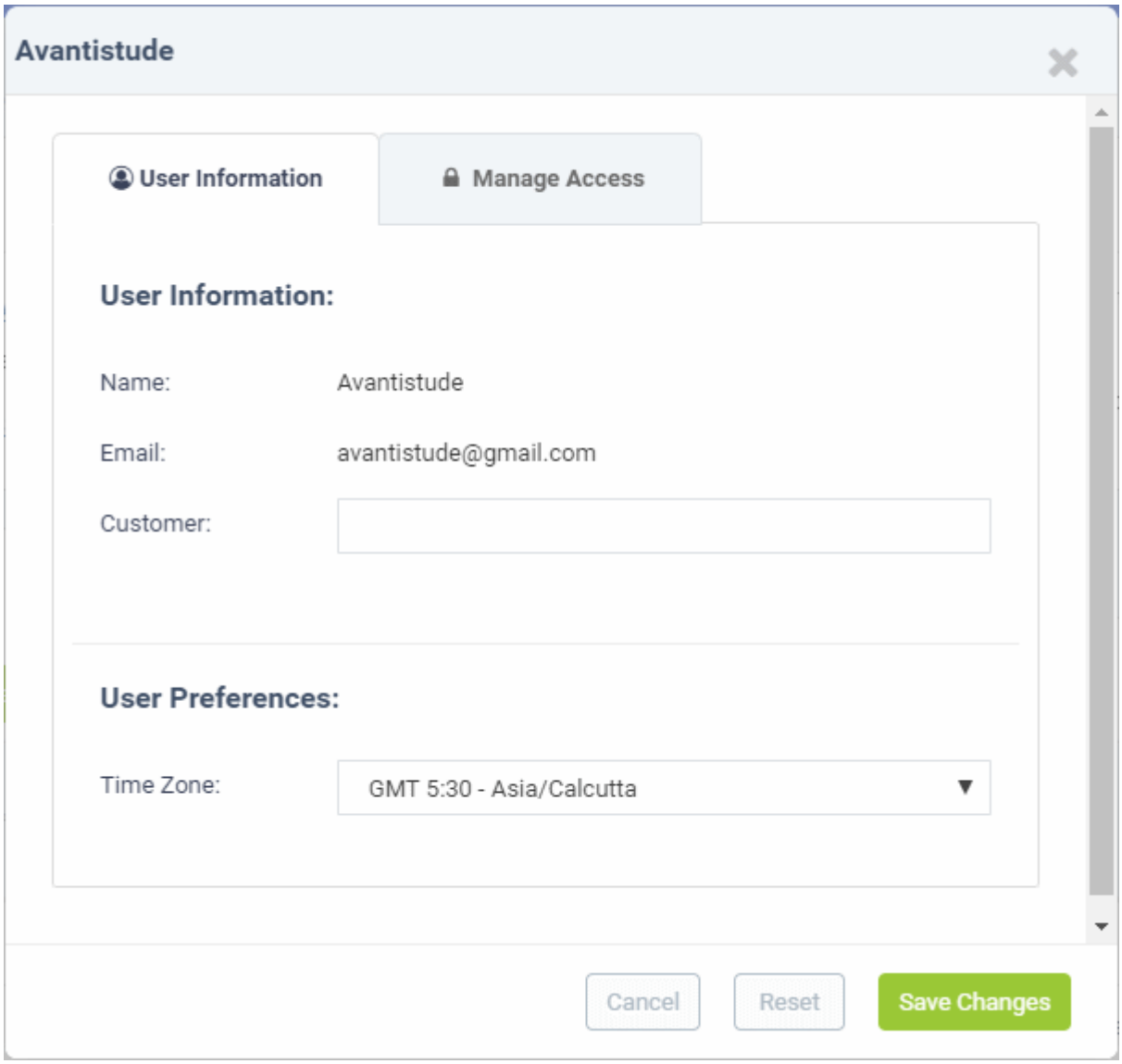
Manage account access / User Information

Service Desk allows staff members to lock a user's account and disallow password changes.

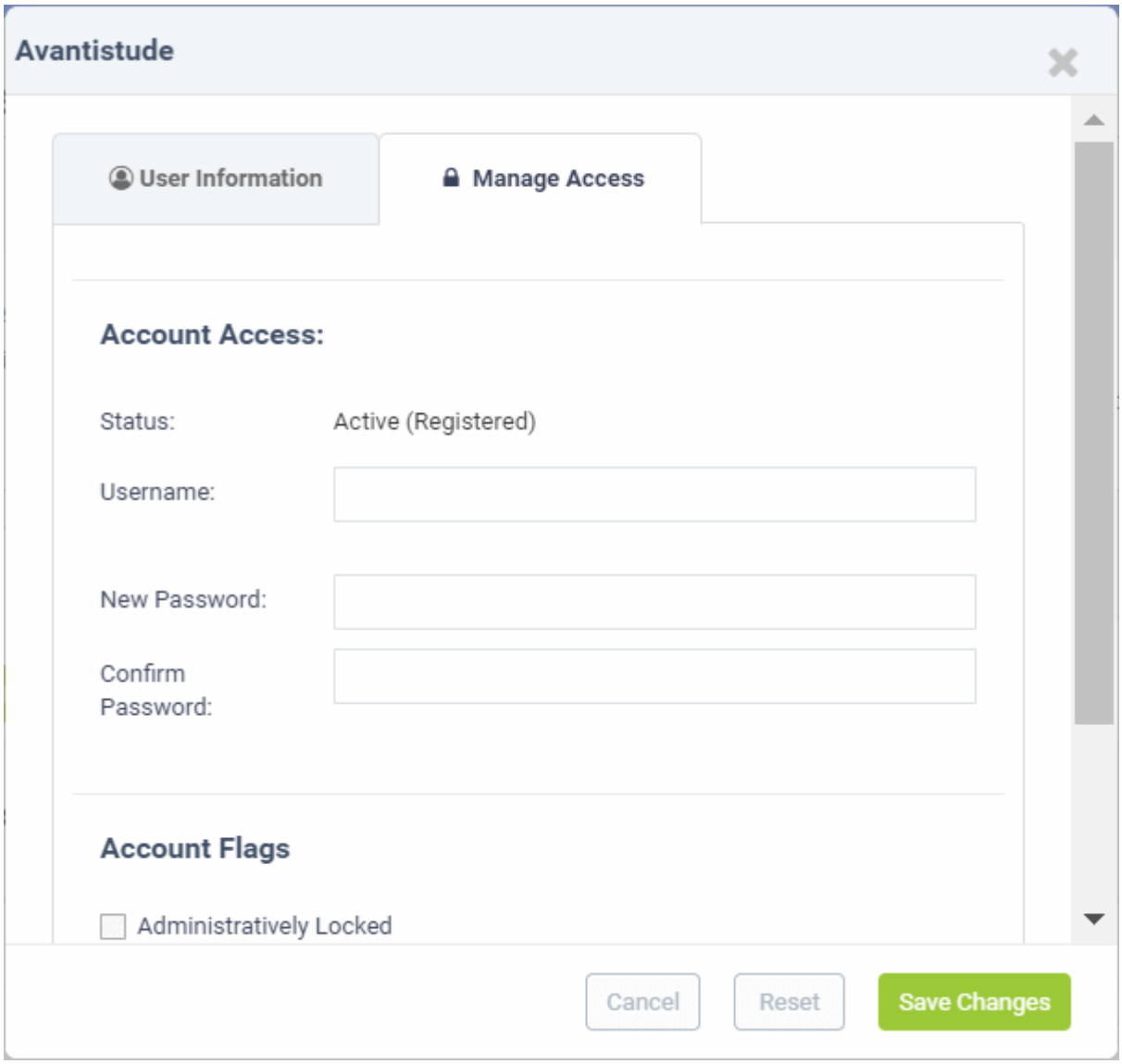
- To manage account access for a user, click their name then the 'More' button. Alternatively, click the 'Manage Account' button:



The 'User Information' tab lets staff change a user's company and time zone:



The 'Manage Access' tab allows staff to configure a user's access to his/her account:



Account Access

- **Username:** Edit the user email if required.
- **Password Fields:** Enter the new password and confirm it.

Account Flags

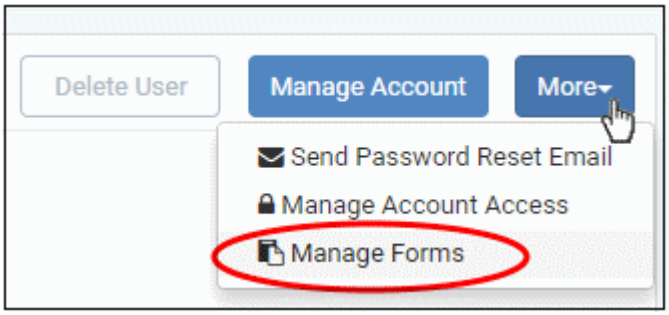
- **Administratively Locked:** If enabled, the user cannot access the web portal. However, the user can raise tickets via email.
- **Password Reset Required:** If enabled, a reset password screen will be displayed when the user logs into the web portal.
- **User Cannot Change Password:** If enabled, the user cannot change his/her password.

Click the 'Save Changes' button for your updates to take effect.

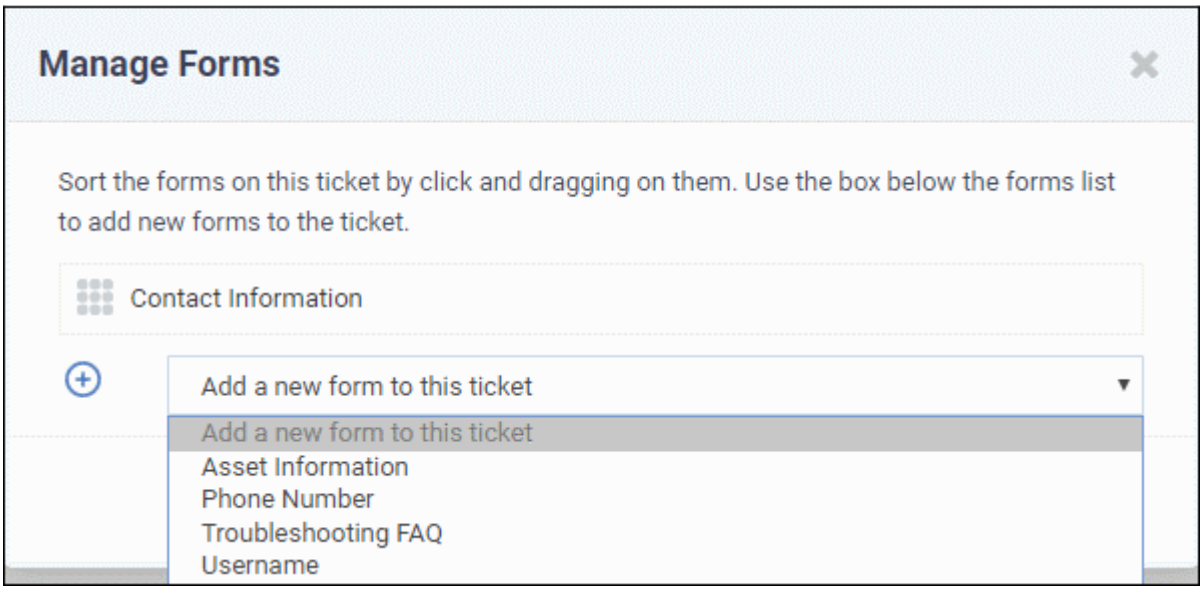
Add forms

By default, the contact information of the user is mandatory and staff members can add more forms to include more details about the user.

- To add more forms for a user, click on the name link in the 'User Details' interface, then click the 'Manage Forms' link from the 'More' button at the right side.

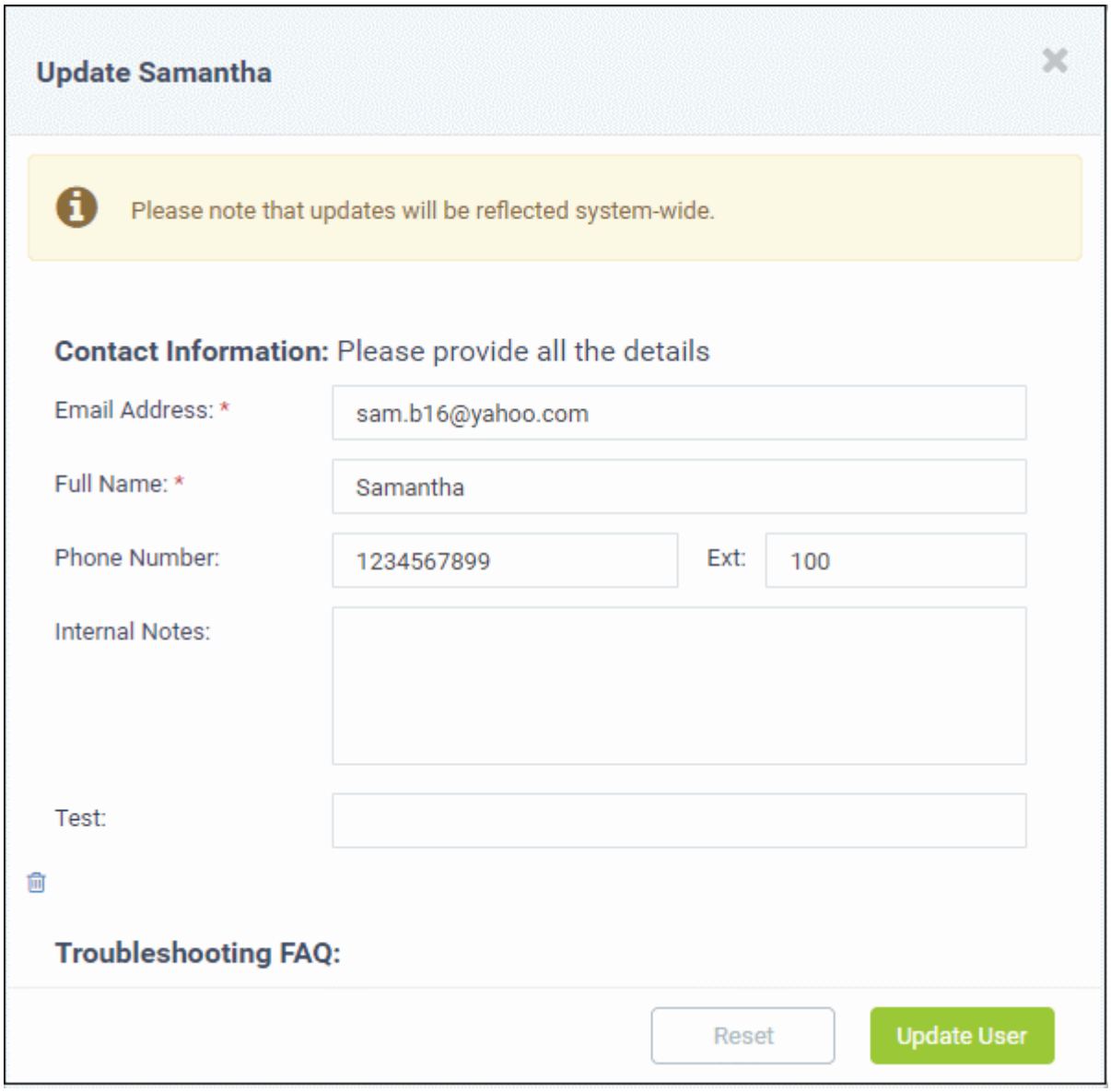


The 'Manage Forms' for the selected user screen will be displayed.

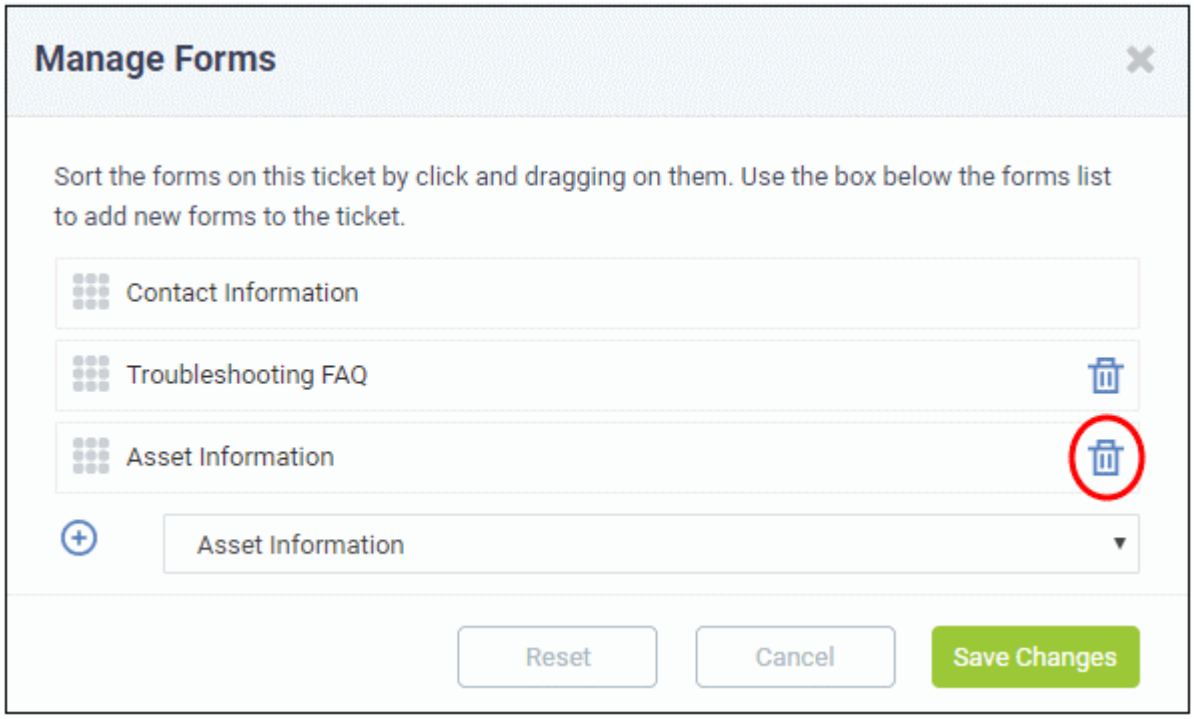


- Select the required form to be added for the user from the drop-down. The forms that are listed here are configured in 'Admin Panel' > 'Manage' > 'Forms' >' Add Custom Form'. See '**Forms**' in Service Desk admin guide if you need more details on this.
- Click the 'Save Changes' button.

After adding the new form, staff can update a user's details by clicking their user name in the 'User Details' interface.



- Fill the details and click the 'Update User' button at the bottom.
- To remove a form for the user, click the 'Manage Form' button and then the trash can icon.



- Click the 'Save Changes' button at the bottom.

Add a user to a customer company

- You can assign users to a customer to keep track of billable items associated with the user.
- Cost reports in the admin panel show billing details for tickets assigned to a customer
- There are two methods to add users to companies:
  - 'User Details' screen - Add users here then assign them to a customer
  - Create a customer - Then add users to the customer afterwards. You can create a customer in the Comodo One console as follows:

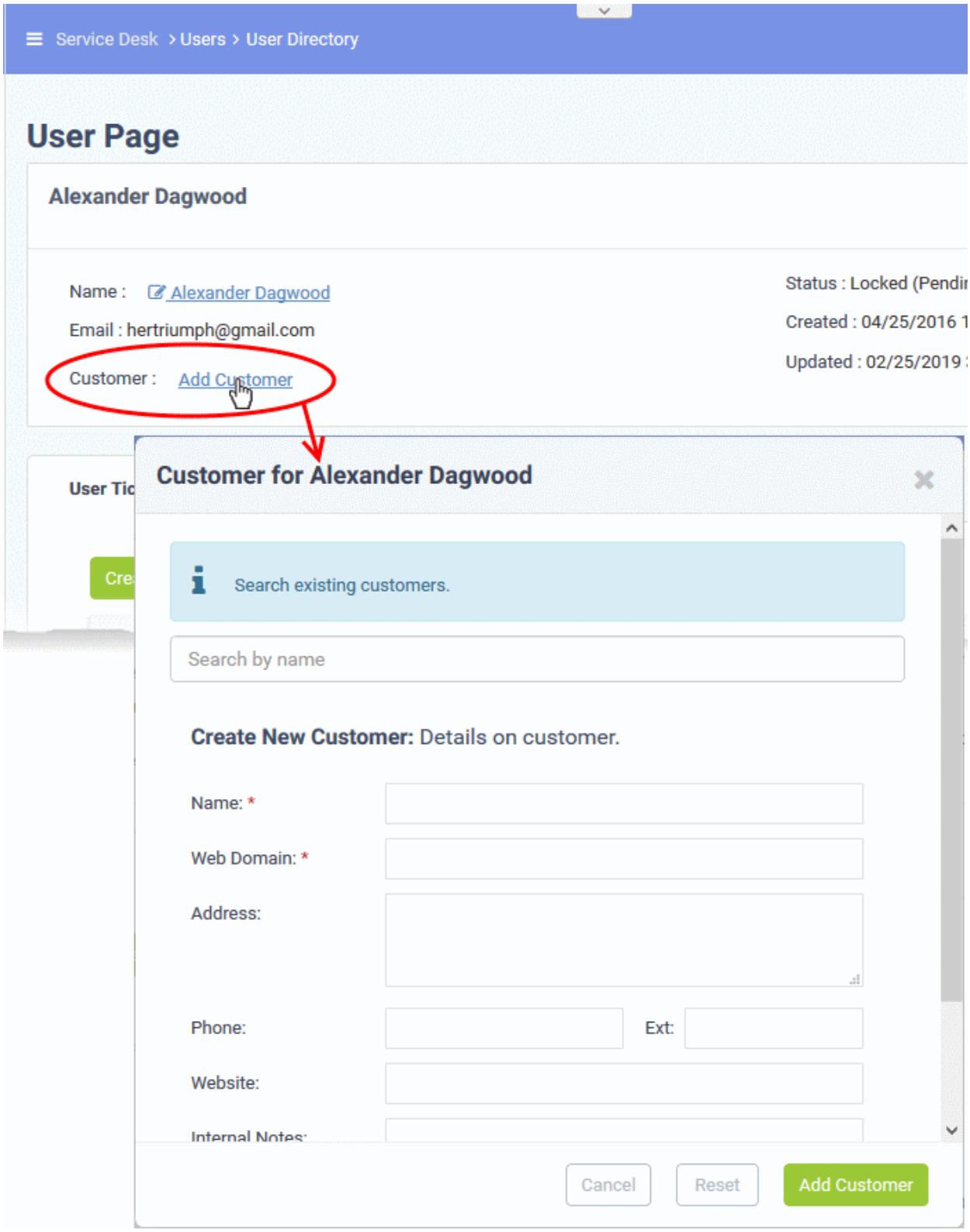
    Login to Comodo One > Click 'Management' > 'Customers' > 'New Customer'

    See **Manage Customers** if you'd like more help with this.

The following example show how to assign users to an existing customer:

Add a user to a company

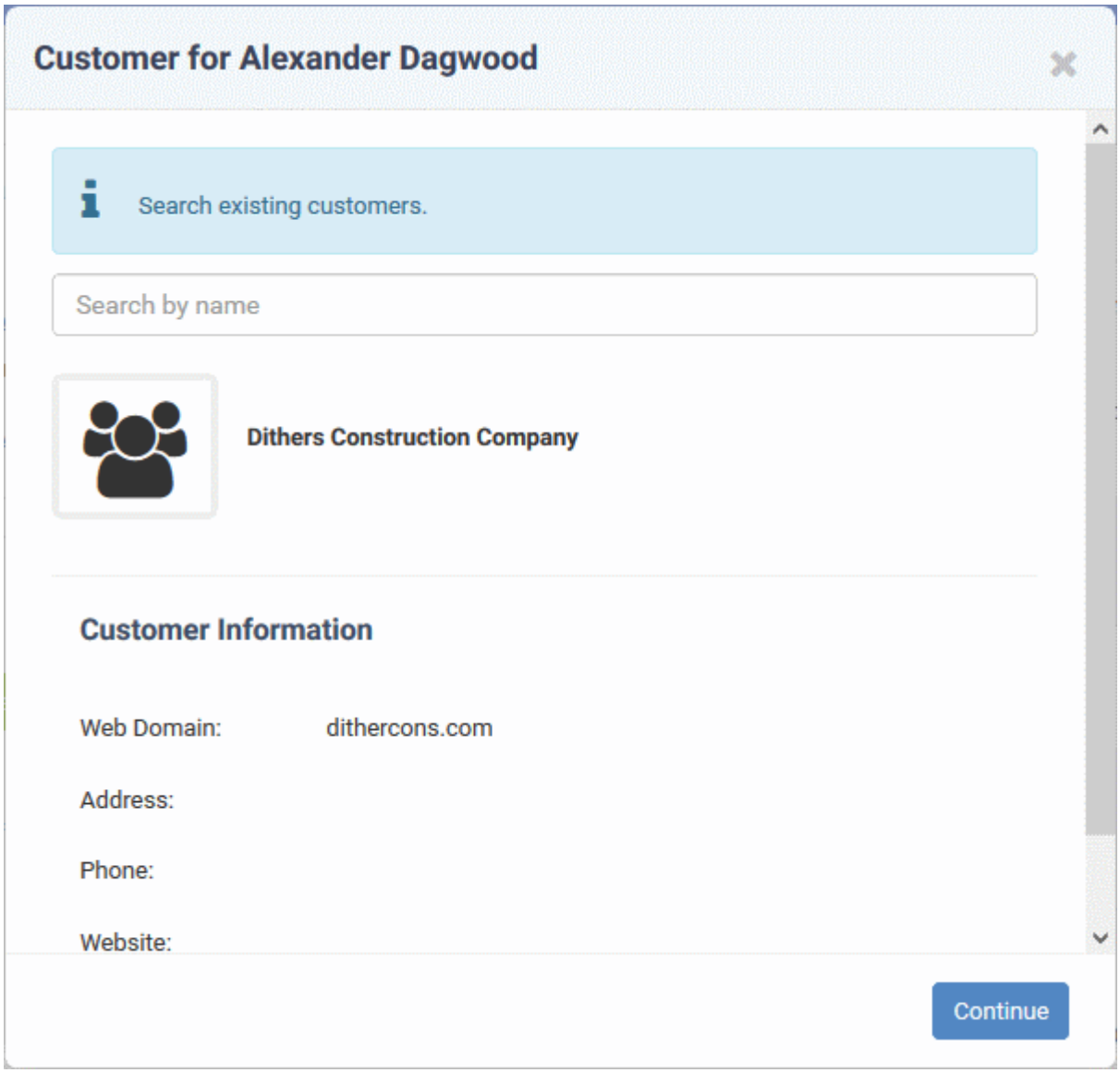
- Click 'Users' > 'User Directory'
- Click on the name of a user to open their details page.
- Click the 'Add Customer ' link as shown:



You can assign the user to an existing customer or to a new customer

- **Add user to an existing customer** - type the first few letters of the customer name in the search field. Select from the suggestions.

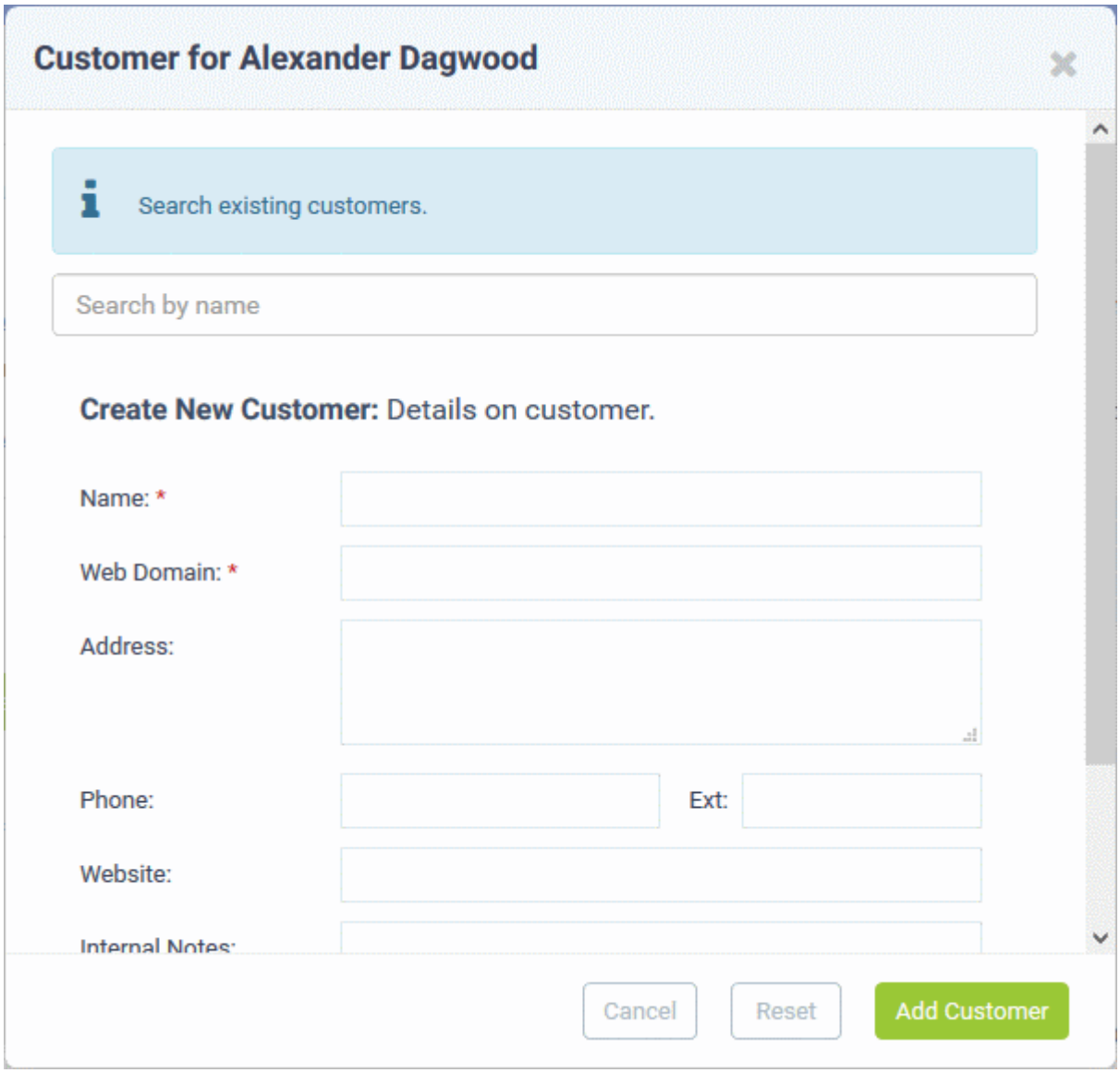
After choosing a customer, a confirmation dialog appears with the details of the customer:



- Click 'Continue'.

The user will be added to the customer.

- Alternatively, complete all fields to create a new customer, then click 'Add Customer':

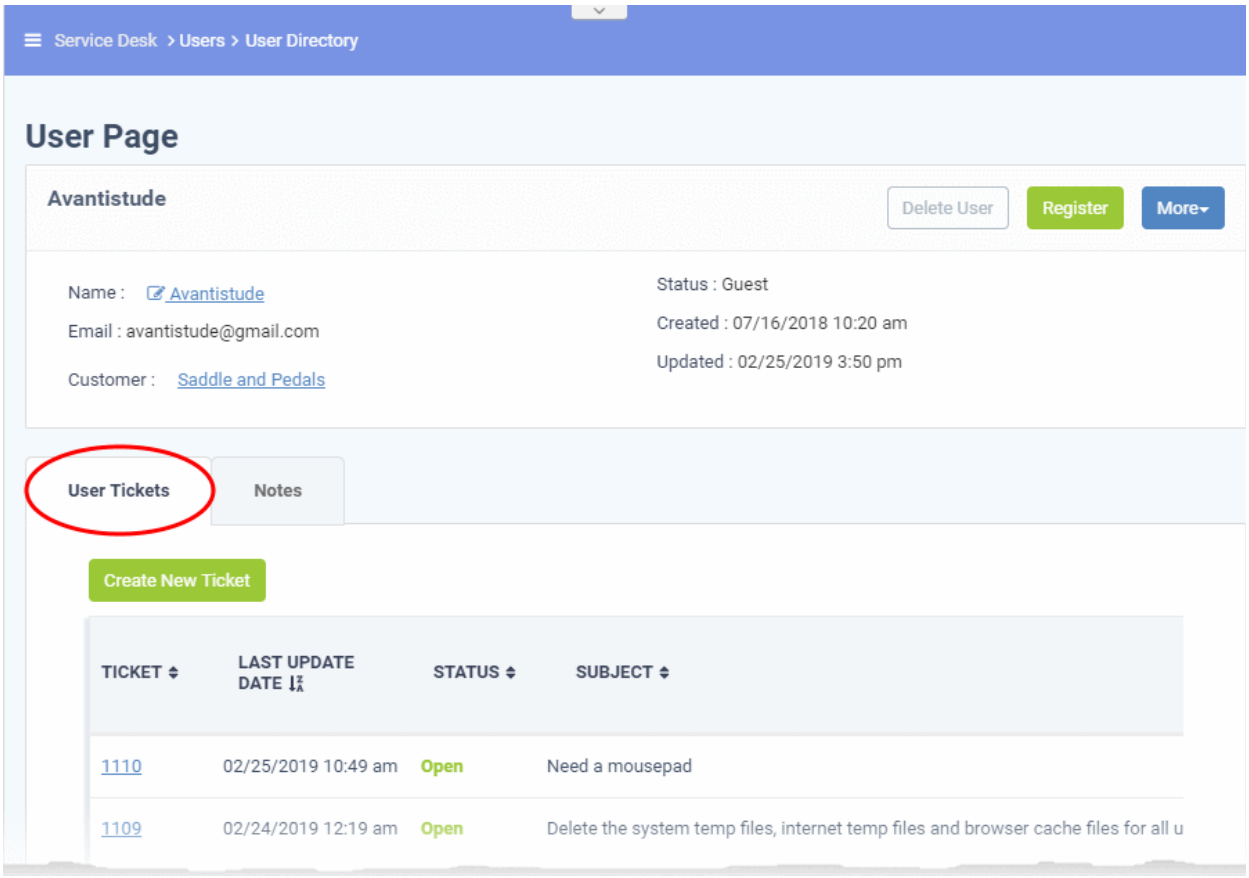


- See **Manage Customers** if you need help to create a new customer.

Manage tickets raised by a user

Tickets that are raised by a user can be managed from the 'User Directory' interface. This screen enables staff members to view and manage tickets created by users.

- Click 'Users' > 'User Directory' > Click the user name > Open the 'User Tickets' tab to view and manage tickets created by a user.



The screen shows tickets created by the user. The most recently created tickets are shown at the top.

Column Headers

- **Ticket:** The number assigned to the ticket. Clicking on the ticket number will open the 'Ticket Details' screen. See '**Manage Tickets**' for more details.
- **Last Update Date:** The date and time the ticket was last updated.
- **Status:** Indicates the current status of the ticket whether open, closed, overdue or paused.
- **Subject:** The summary of the issue entered in the Issue Summary text field in the web portal by the user.
- **Assigned To:** The name of the staff member to whom the ticket is assigned.

- Place your mouse over a ticket to view ticket details.

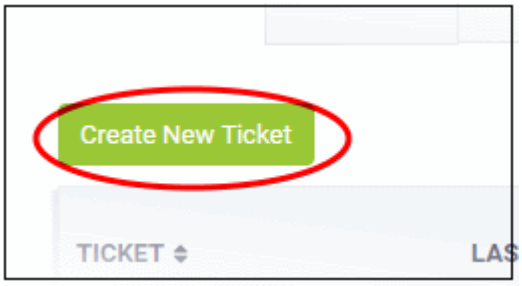
The ticket preview allows staff members to view the details and the links at the bottom to manage it. See **Ticket Details** for more details.

Create new ticket on behalf of a user

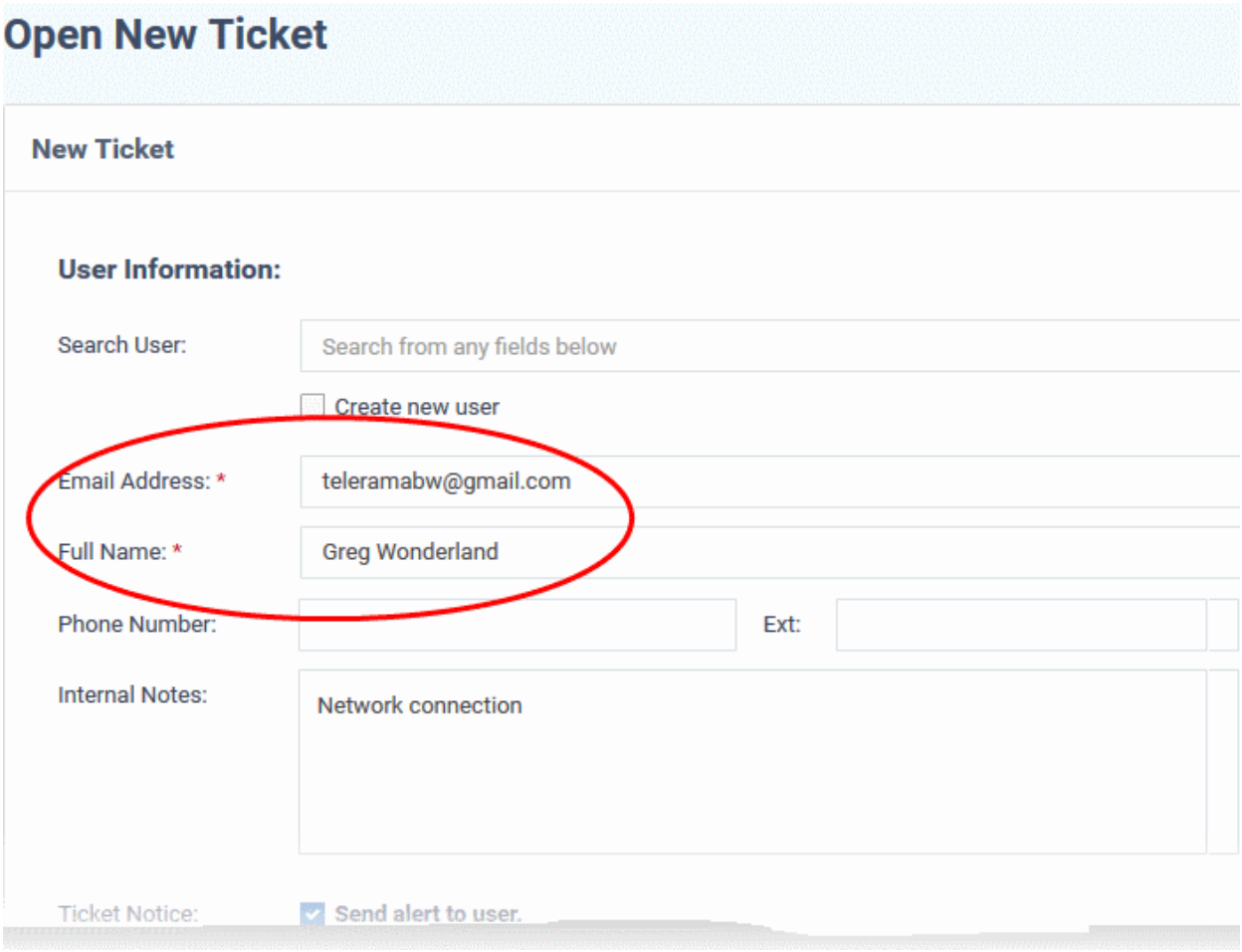
Users may contact staff over the phone about an issue. Afterwards, the staff member has the option to create a ticket on behalf of the user to track the issue.

To create a ticket on behalf of a user:

- Click 'Users' > 'User Directory' > Click the user name > Open the 'User Tickets' tab > Click 'Create New Ticket' button



The 'Open New Ticket' screen will open:



- With the exception that the user name is pre-selected, the form is the same as when creating a new ticket using the normal process.
- See '**Create a new ticket on behalf of a user**' in **Manage Tickets** if you need help to complete this form.

Export users list to a CSV file

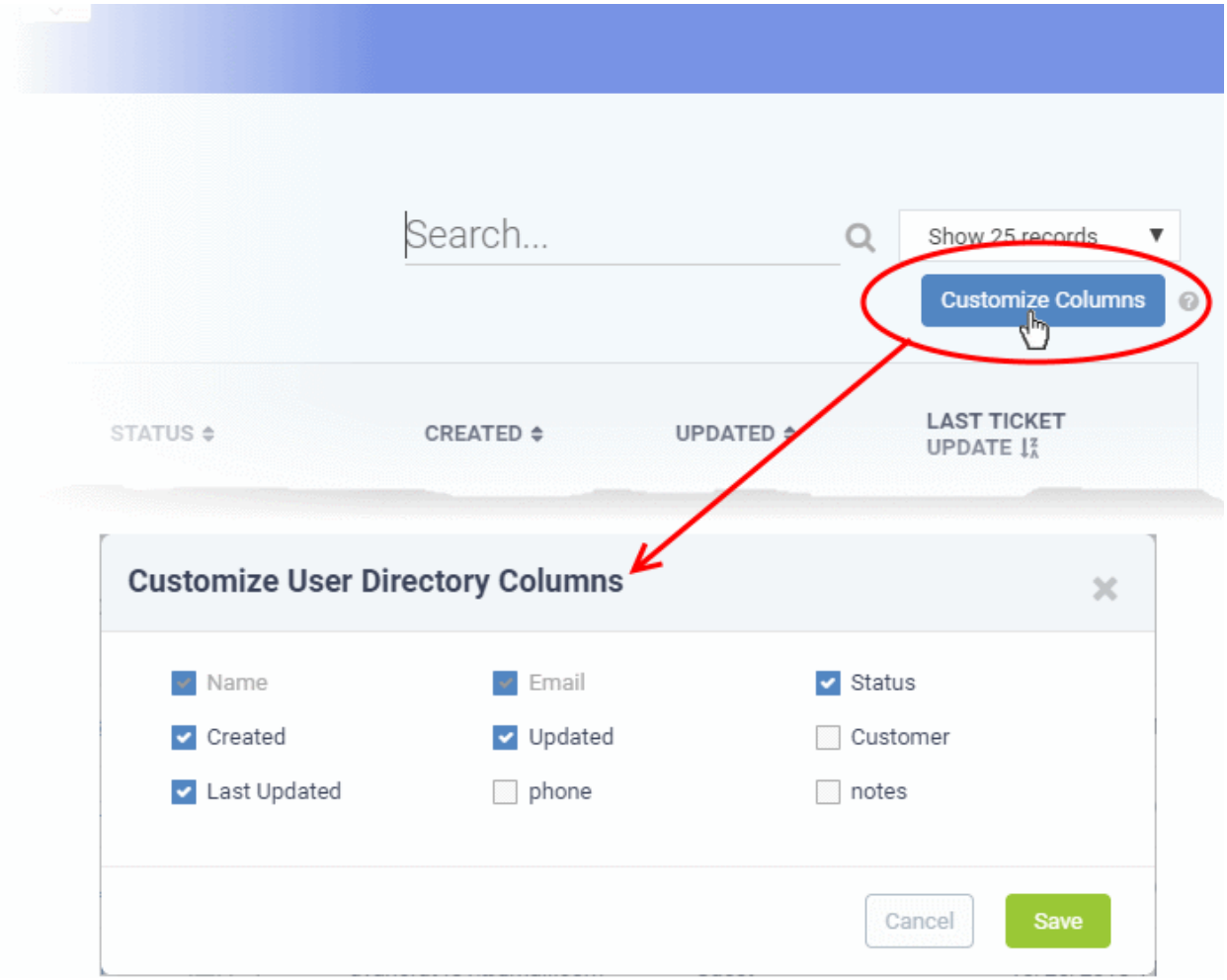
- To download a full list of current users, click the Export to CSV' link at the top of the 'User Directory' interface.

The file be downloaded and can be opened with applications such as Excel or Open Office Calc.

Modify Table Columns

Six columns are displayed by default in the 'User Directory' interface. You can add more columns if you want to view additional details or hide columns that you do not want to be displayed.

- To add or remove columns, click the 'Customize Columns' button:



- Use the check-boxes to enable or disable columns as required

Note: Mandatory columns appear gray and cannot be disabled.

- Click 'Save' to add/remove the selected columns to the list

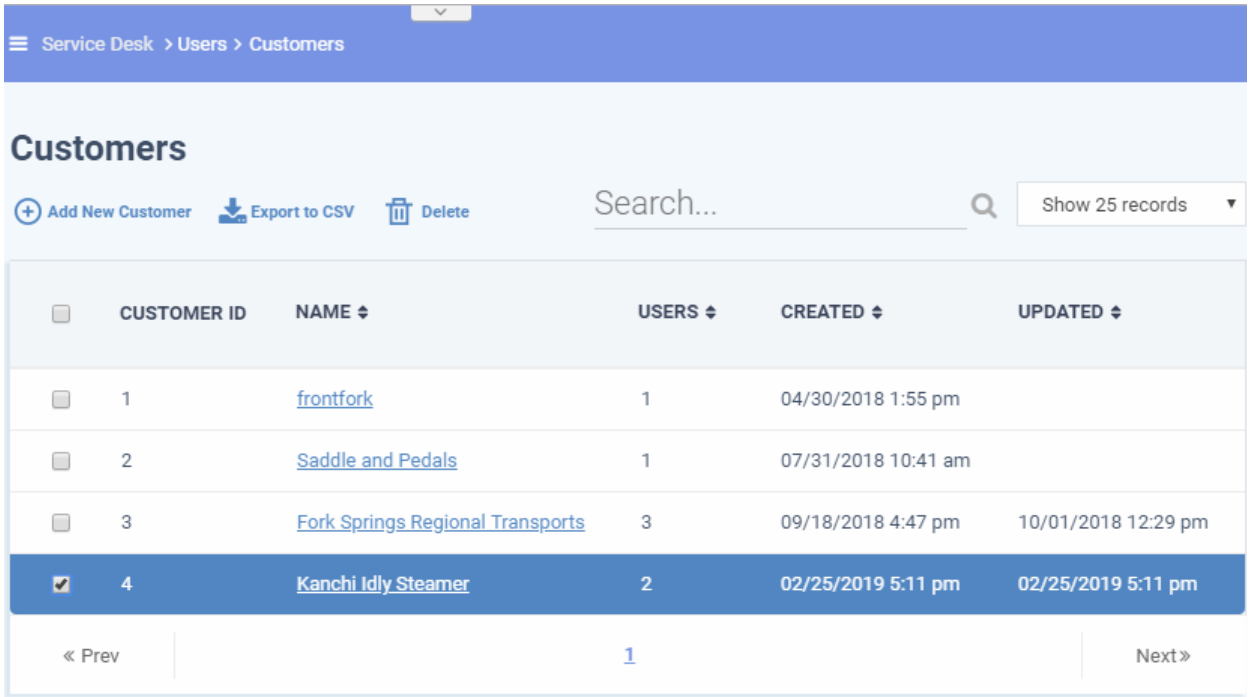
2.2.2 Manage Customers

- Click 'Staff Panel' > 'Users' > 'Customers'
- A customer is an organization, usually a company or business from whom you will accept tickets. 'Users' are the people who actually submit the tickets.
- The customers interface allows staff to:
    - Add and manage customers
    - Assign end-users to customers
    - Manage the tickets of users assigned to the customer
    - Configure account managers and primary contacts.
    - View contracts agreed with the customer.

Notes

- We advise you create customers in the Comodo One interface rather than in Service Desk. Such 'Managed' customers will be universally available in all integrated modules (Endpoint Manager, Quote Manager etc).
    - Login to C1 > Click 'Management' > 'Customer' > 'New Customer'
- Alternatively, you can create 'standalone' (aka 'unmanaged') customers in Service Desk. Customers added via Service Desk will not be available in Comodo One or other modules. You can add such standalone customers to C1 later to convert them to fully managed.
- See '**Manage Companies**' in Comodo One admin guide for help to add customers in C1
- See '**Add a Customer**' for help to add standalone customers in Service Desk.

The customers interface shows both managed customers (created in C1), and unmanaged customers (created in Service Desk):



Staff can perform the following tasks from the 'Customers' interface:

- **Add a customer**
- **Manage Details of a customer**
- **Manage users of a customer**
- **Manage forms**
- **Manage tickets**

- **Manage notes**
- **View service contracts of a customer**
- **Remove Unmanaged customers**
- **Export customer list**

Customers interface - Table of Column Descriptions	
Column Header	**Description**
Customer ID	The identity number assigned to the customer by Service Desk.

Name	The organization or company that is your customer.
	• Click the name of a customer to open their details interface.
	• From this interface you can:
	  • **Manage details of the customer**
	  • **Add and manage users of the customer**
	  • **Manage forms for the customer**
	  • **View and manage tickets**
	  • **Manage notes**
	  • **View service contracts of the customer**

Users	Number of Service Desk users added to the customer company.
Created	The date on which the customer was added to Service Desk.
Updated	Date and time at which the customer details were most recently updated.

Sorting items

- Click a column header to sort items in ascending/descending order

The 'Show records' drop-down on the right allows you to select the number of entries to be displayed per page. The options range from 10 records per page up to 100. The default value can be set in the '**My Profile**' interface. You can navigate to different pages by clicking 'Next' and 'Prev'.

Search Options

- The 'Search' field lets you filter customers by name, address, phone number and website. Simply start typing your search term to see matching customers.
- To remove all filters, clear the search field or click the 'Customers' link.

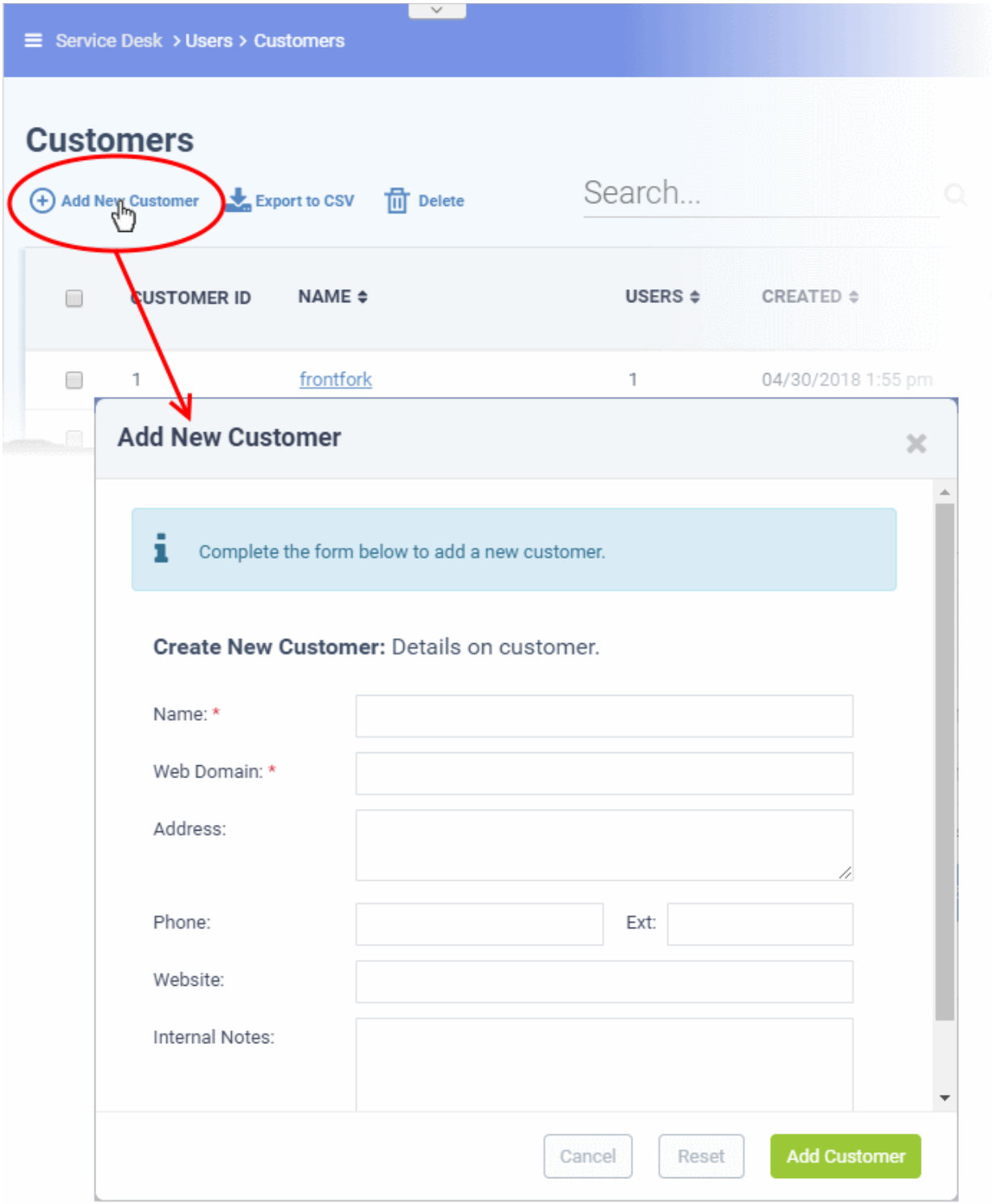
Add a Customer

Customers that are added via this interface will be available for ticket management alone and will not be listed in the C1 interface. Staff members can assign users to these customers and can access the customers' tickets and contracts. Staff members can also add customers from the 'User Directory' interface (See the explanation under '**Add a user to a customer company** ' in the previous section **Manage Users** for more details on this).

The following tutorial describes how to add customers from the 'Customers' interface:

Add a customer

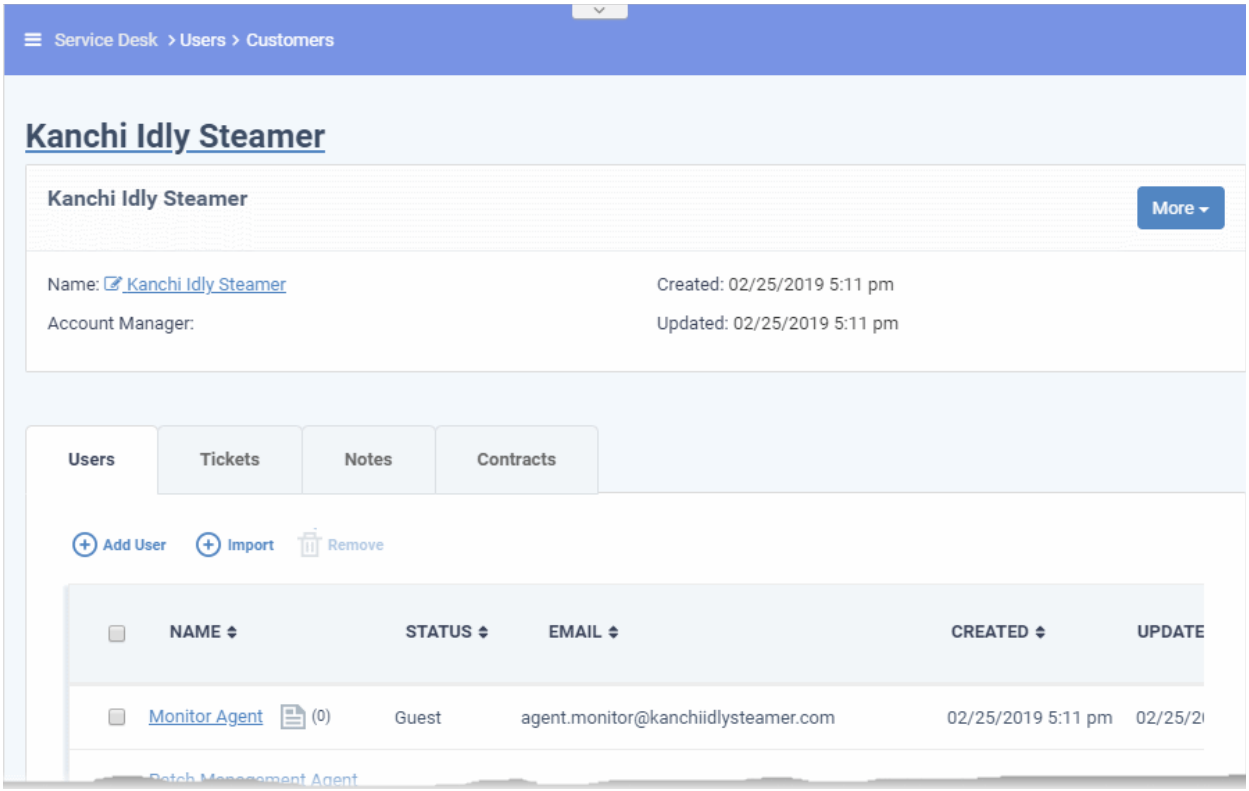
- Click > 'Users' > 'Customers'
- Click the 'Add New Customer' link at the top



- **Name**: Enter a label for the customer company.
- **Web Domain**: Enter the name of the email domain used for the employees of the company.
  - Service Desk creates two new users 'Monitor Agent' and 'Patch Management Agent' with email addresses in this domain. These user accounts are used to receive automatically generated tickets from Endpoint Manager.
  - They are also used to assign to your customer any guests who submit a ticket from an email address at this domain.
- **Address and Phone**: The contact details of the company.
- **Website**: The URL of the customer's site.
- **Internal Notes**: Enter any notes regarding the customer.

Note: You can change the field labels of this form in 'Admin Panel' > 'Manage' > 'Forms' > 'Customer Information'. See **Forms** in Service Desk admin guide for more information.

After completing the form, click the 'Add Customer' button to add the company to Service Desk. You can now configure its settings and users.



Two new users and email ids are automatically created - the Monitor Agent and the Patch Agent. The email IDs of these two agents are used to collect tickets which have been auto-submitted to service desk by other C1 modules.

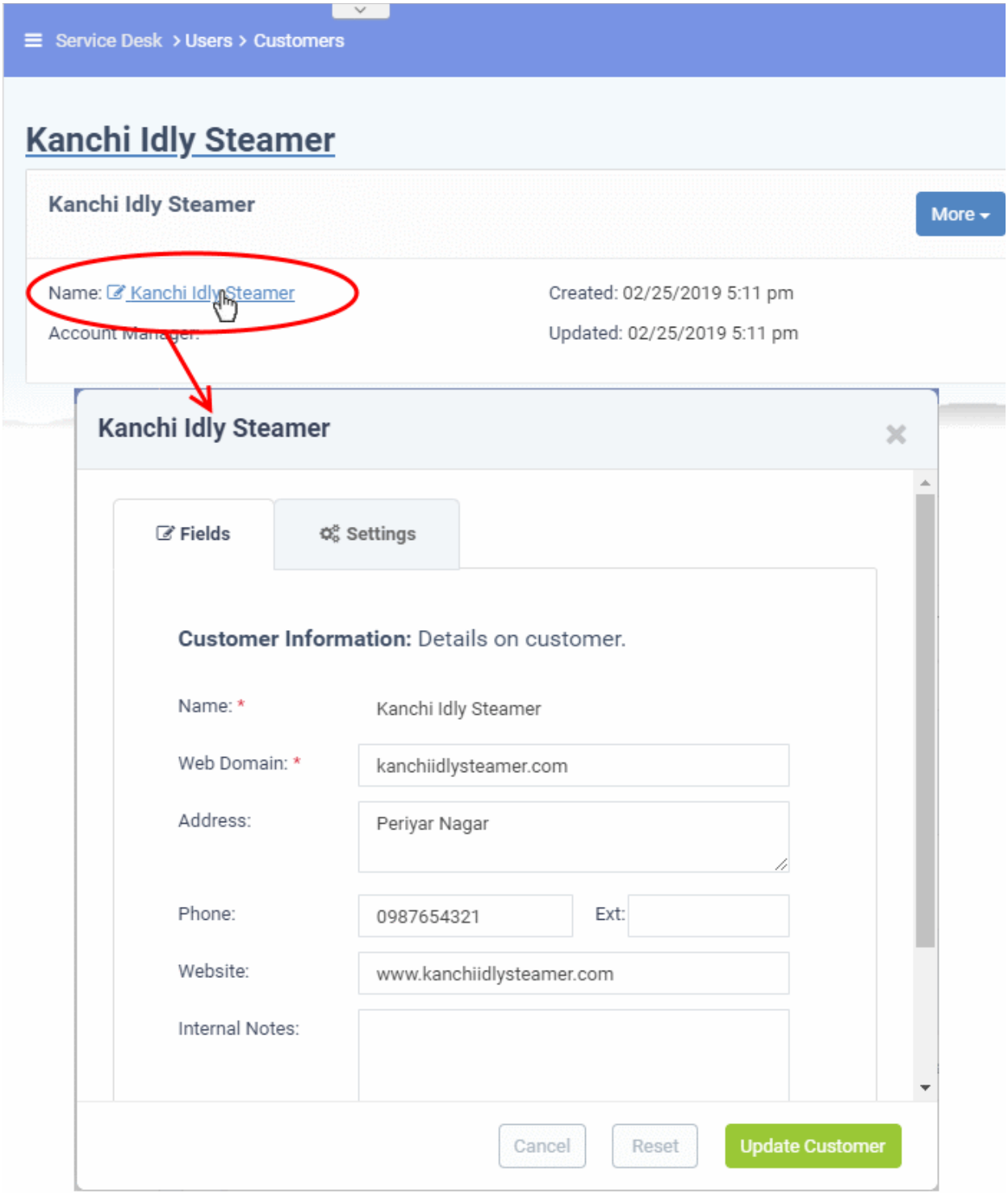
- Background. Comodo One contains several modules that help IT managers to keep their organization's computers running smoothly. Two of these modules, Endpoint Manager and Patch Management, are capable of automatically sending tickets to Service Desk via API. See **API Keys** for more details.

Manage Customer Details

- The 'Customers' interface lets staff view and update both managed and non-managed customers.
  - **'Managed' customers** - Those added through the Comodo One console. Managed customers are available for selection in all Comodo One modules, including EM and CRM.
  - **'Non-Managed' customers** - Those added via the Service Desk interface. These customers are only available in Service Desk.
- You can also configure:
  - The default email account for outgoing mails sent on behalf of the customer.
  - The account manager responsible for the customer
  - Ticket auto-assignment rules and more.

To view and manage details of a customer

- Click 'Users' > 'Customers'
- Click the name of the customer company to open its details interface.
- Click the name of the company in the details interface to open its configuration interface



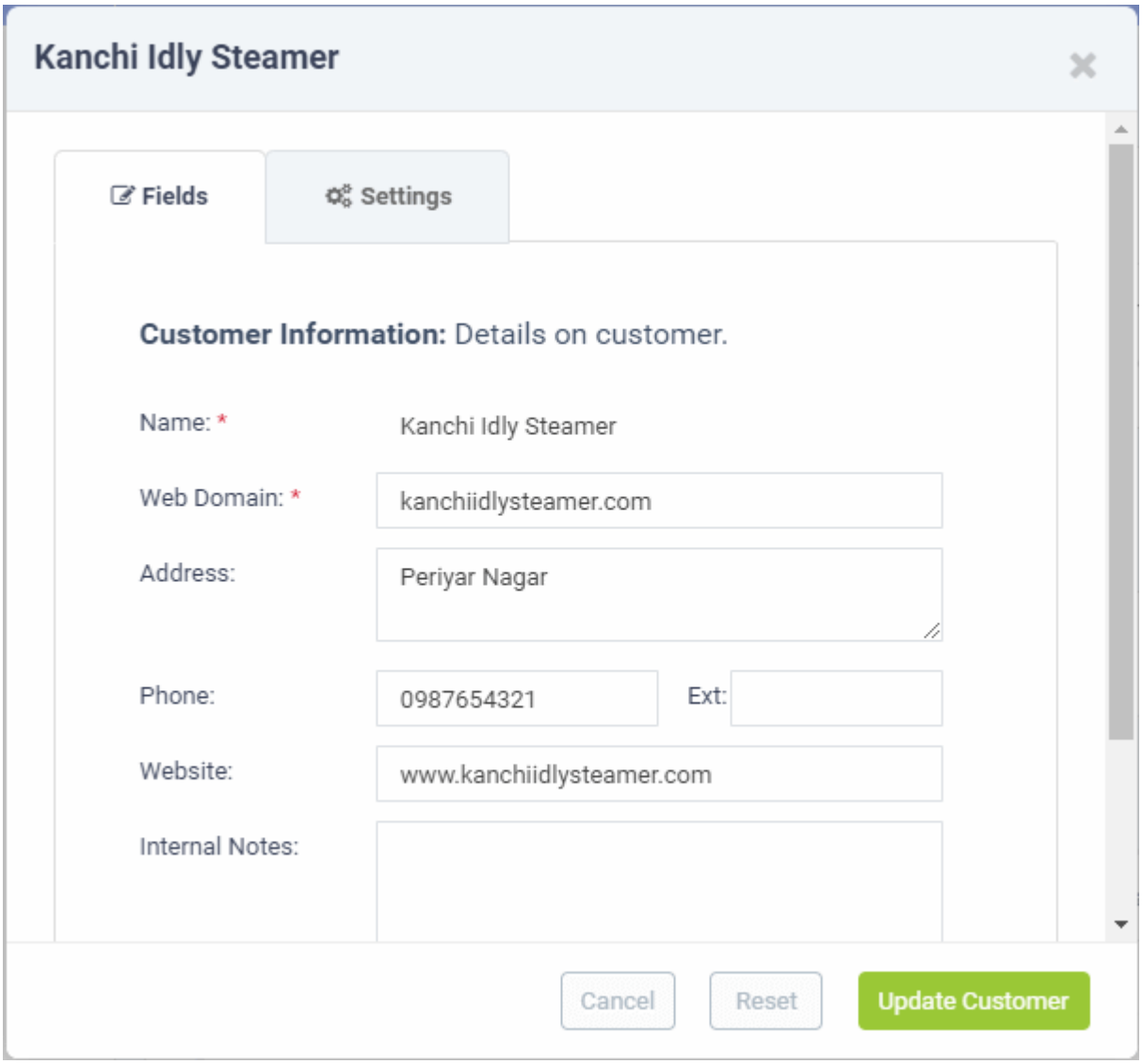
The configuration interface has two tabs:

- **Fields** - View and edit general details of the customer.
- **Settings** - View and edit advanced details like outgoing email addresses, account administrator, auto-assignment rules and so on.

The 'Fields' tab

The fields tab shows general details of the customer and allows you to edit them as required.

- Note. If required, you can create a custom form for the customer with additional fields. See **Manage Forms for the Customer** for more details. Click 'Admin Panel' > 'Manage tab' > 'Forms' > 'Add Custom Form' to create a new form.

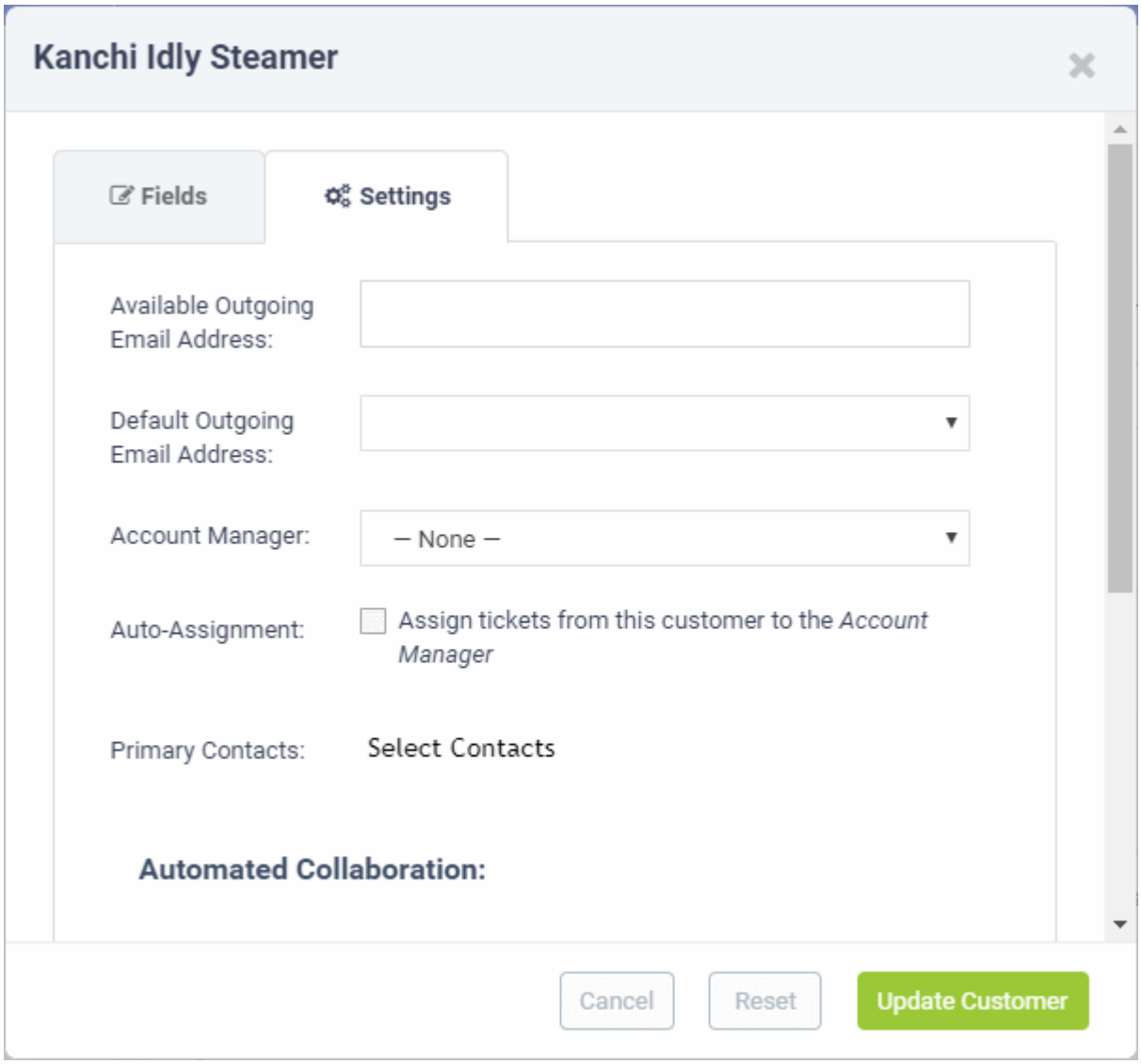


The 'Fields' tab - Form Parameters	
Parameter	**Description**
Name	The organization or the company added as customer to service desk. You cannot edit the name from here.
Web Domain	The domain used for email by your customer. • Service Desk creates two new users 'Monitor Agent' and 'Patch Management Agent' with email addresses in this domain. These user accounts are used to receive automatically generated tickets from Endpoint Manager. • They are also used to assign to your customer any guests who submit tickets from an email address at this domain. You can change the domain name if required
Address and Phone	The contact details of the customer. You can change these details as required.
Website	The URL of the company's website. You can change the website details if required.
Internal Notes	Enter any notes regarding the customer.

Type	Indicates whether the customer is 'managed' (added through C1) or 'non-managed' (stand-alone customer added through Service Desk)

- Edit the details as required.

The 'Settings' tab



The 'Settings' tab - Form Parameters	
Parameter	**Description**
Available Outgoing Email Address	This field shows all available email addresses added for receiving ticket requests and sending outgoing mails. Choose the address you want to use from the 'Default Outgoing Email Address' drop-down. **Background Note**: You can configure these email addresses in 'Admin Panel' > 'Emails' > 'Emails'. See **Email Addresses** in Service Desk admin guide if you want more help with this.
Default Outgoing Email Address	Select an email address to be used for emails and ticket responses for this

	customer. The 'Default Outgoing Email Address' drop-down shows addresses from the 'Available Outgoing Email Address' field.
Account Manager	The drop-down shows all admins and staff added to service desk. Choose the account manager responsible for the customer.
Auto Assignment	Choose whether or not tickets created by users of the customer are automatically assigned to the account manager.
Primary Contacts	Select the person with whom your staff can liaise on issues.
Automated Collaborations	Collaborators receive copies of all communications between staff and users during the progress of a ticket. Collaborators can respond to communications. • Primary Contacts - All primary contacts selected in the 'Primary Contacts' will be added as collaborators for the tickets pertaining to the customer. • Customer Members - All users in the customer company will be added as collaborators for the tickets pertaining to the customer.
Main Domain: Auto Add Members From:	Specify the domains from which guest users can be imported for the customer. Guests are auto-assigned to the customer if the email address they used to submit a ticket matches any domain in this field.

- Click 'Update Customer' for your settings to take effect.

Manage users of a customer company

- Click 'Users' > 'Customers' > click on a customer name > Open the 'Users' tab
- The users tab lets you add or remove users which are assigned to your customers

Add users to a customer

There are two places you can add users to a customer:

1. The 'User Directory' area
   - Click 'Staff Panel' > 'Users' > 'User Directory'
   - Click on a customer name to open their details
   - Click 'Add Customer'
   - See '**Add a user to a customer company**' in '**Manage Users**' if you need more help with this.

2. The 'Customers' area
   - Click 'Staff Panel' > 'Users' > 'Customers'
   - Click on a customer name
   - Open the 'Users' tab and click 'Add User'
   - Alternatively, click 'Import' to import users from a .csv file

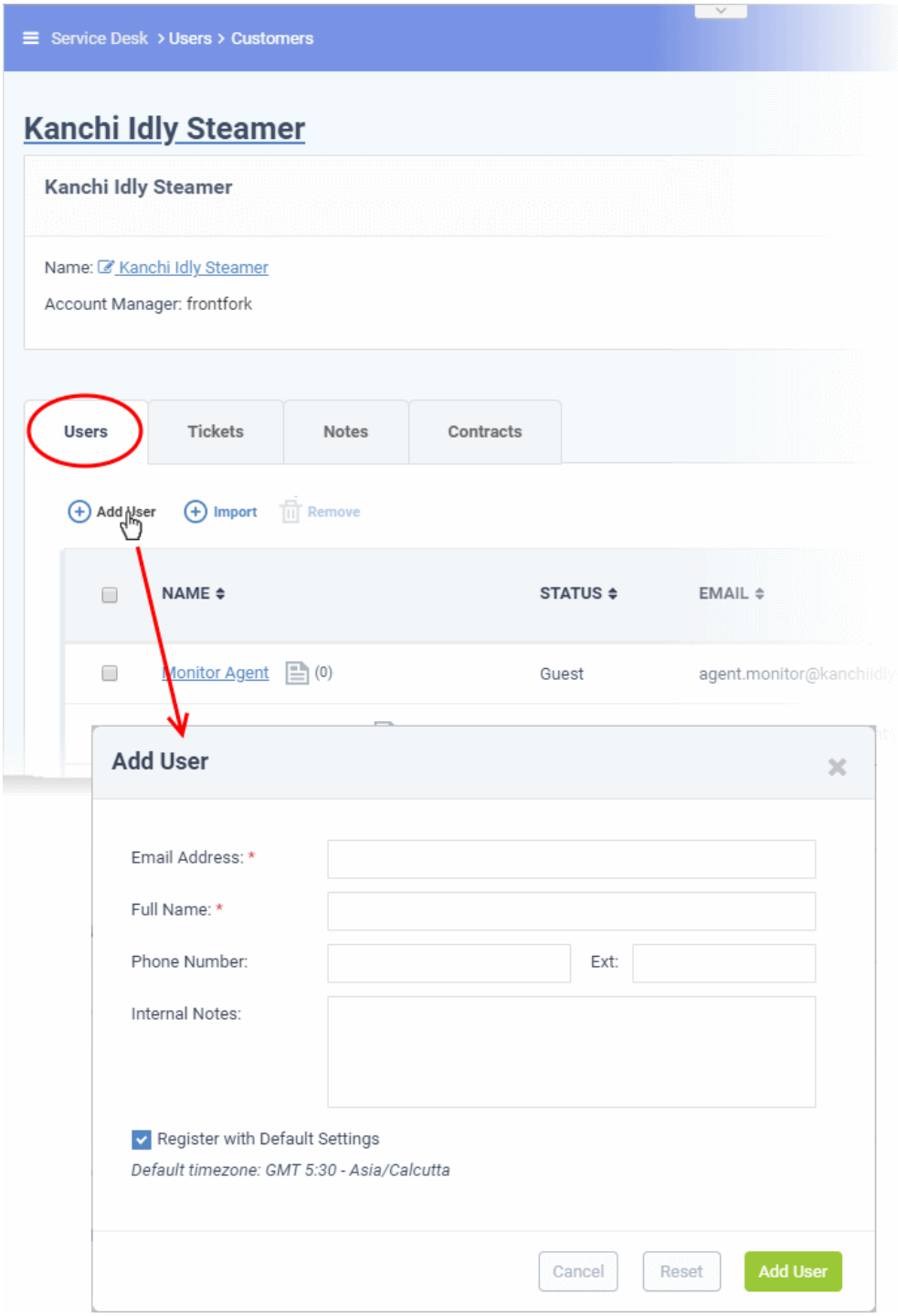
The rest of this section explains option 2 above in more detail.

- **Manually add users to a customer**
- **Import users from a list**
- **Remove users from a customer**

Manually add users to a customer

- Click 'Users' > 'Customers'
- Click the name of a customer company to open its details interface

- Click the 'Users' tab to view a list of users belonging to the customer
- Click the 'Add User' link:

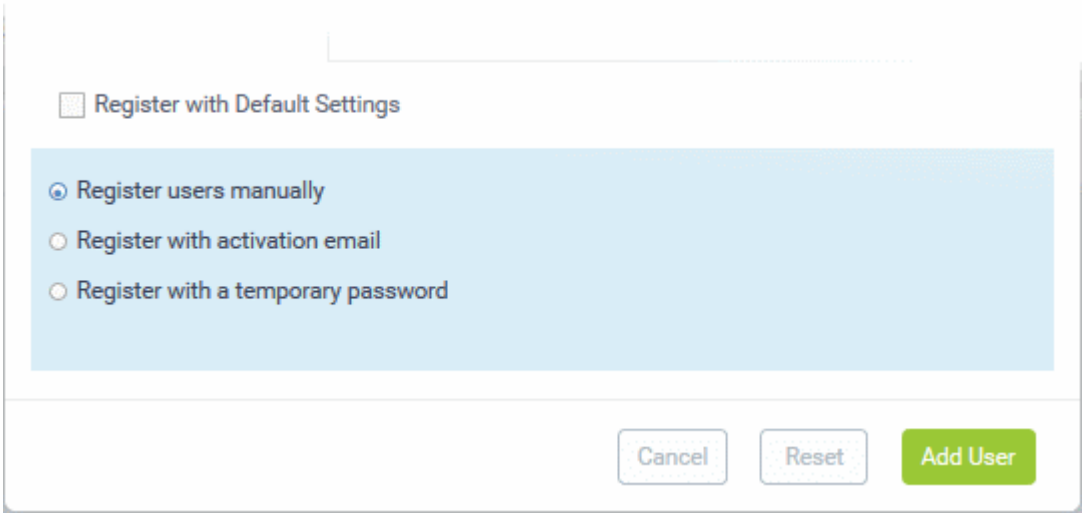


- **Tip**. You can configure the fields in the form above in 'Admin Panel' > 'Manage' > 'Forms' > 'Contact Information'. See '**Forms**' in Service Desk admin guide if you want more help with this.

Complete the details of the new user.

- **Email Address**: Contact mail address. This doubles-up as their username to login to your support portal.
- **Full Name**: First name and last name of the user.
- **Phone Number**: The contact number of the user.
- **Internal Notes**: Enter any comments about the user.

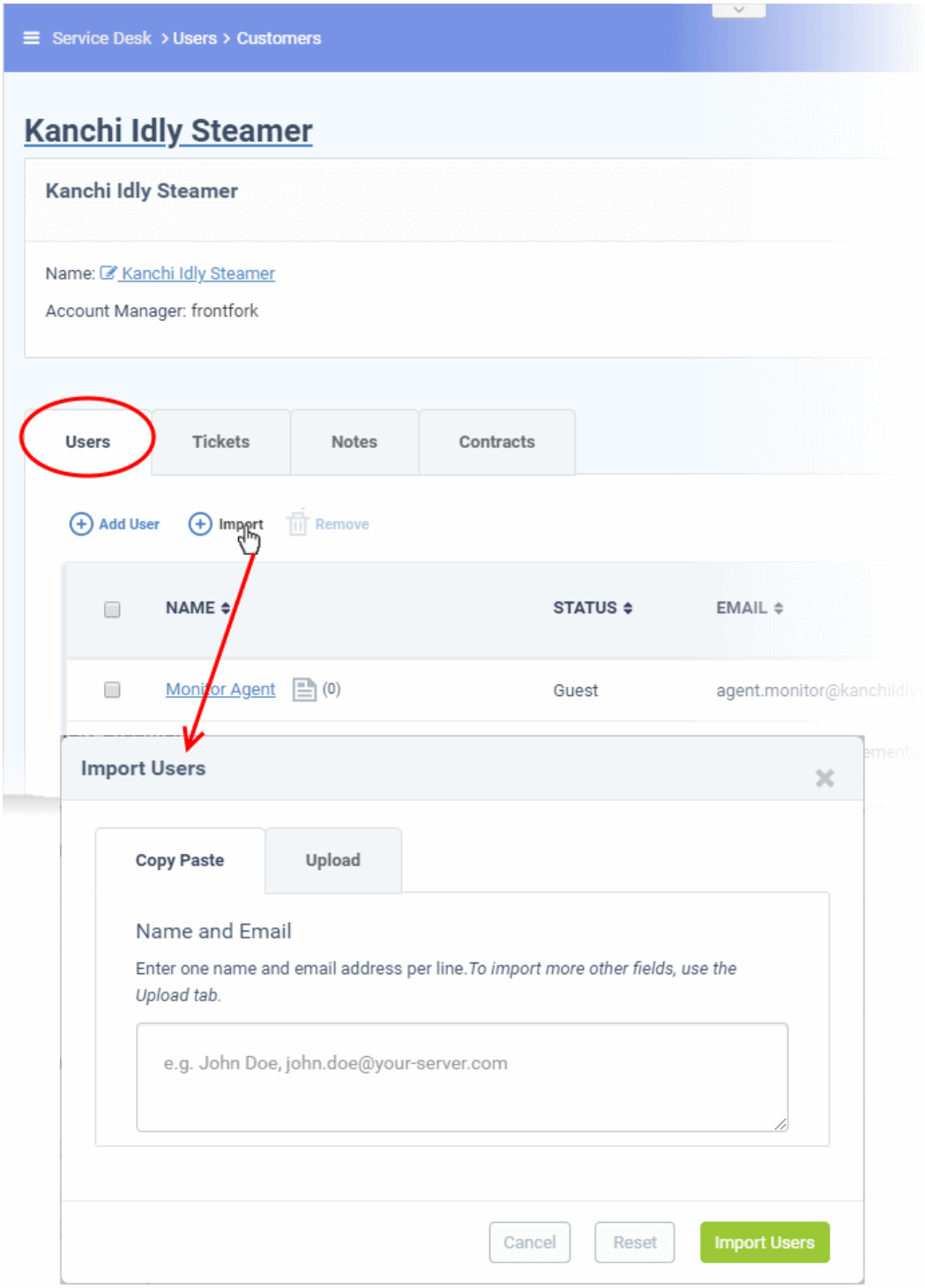
- **Register with Default Settings**: Select whether the registration should use the settings in 'Admin Panel' > 'Settings' > 'Users'
  - Admins can configure how new user accounts are to be registered from the Admin Panel > Settings > Users interface. See **User Registration Settings** in Service Desk admin guide for more details.
  - Leave selected if you want to use the default settings.
  - Deselect to choose a different registration method.



  - **Register users manually** - The user is initially added a guest and needs to be manually registered afterwards. You can register a guest as follows:
    - Click 'Users' > 'User Directory' > click on the name of the guest > Click the 'Register' button
    - See **Register a user** for more details.
  - **Register with activation email** - The user is initially added as a guest and sent a mail which contains a link to register their account.
    The link leads to your support web portal where the user will create a password and so register their account. After registration, the user can login and manage/view their tickets.
  - **Register with a temporary password** - Create a temporary account password which registers the user immediately.
    You need to send the password and URL of your support portal to the user. This allows them to login and manage their tickets.
    - '*Require password change on first login*' - Enable to force the user to create a new password after first login (recommended).
- Click 'Add User'.The user will be added to service desk and assigned to the customer company.
- Repeat the process to add more users

Import users of a customer company

- Click 'Users' > 'Customers'
- Click the name of a customer company to open its details interface
- Click the 'Users' tab to view a list of users belonging to the customer
- Click the 'Import' link at the top



There are two ways to import users:

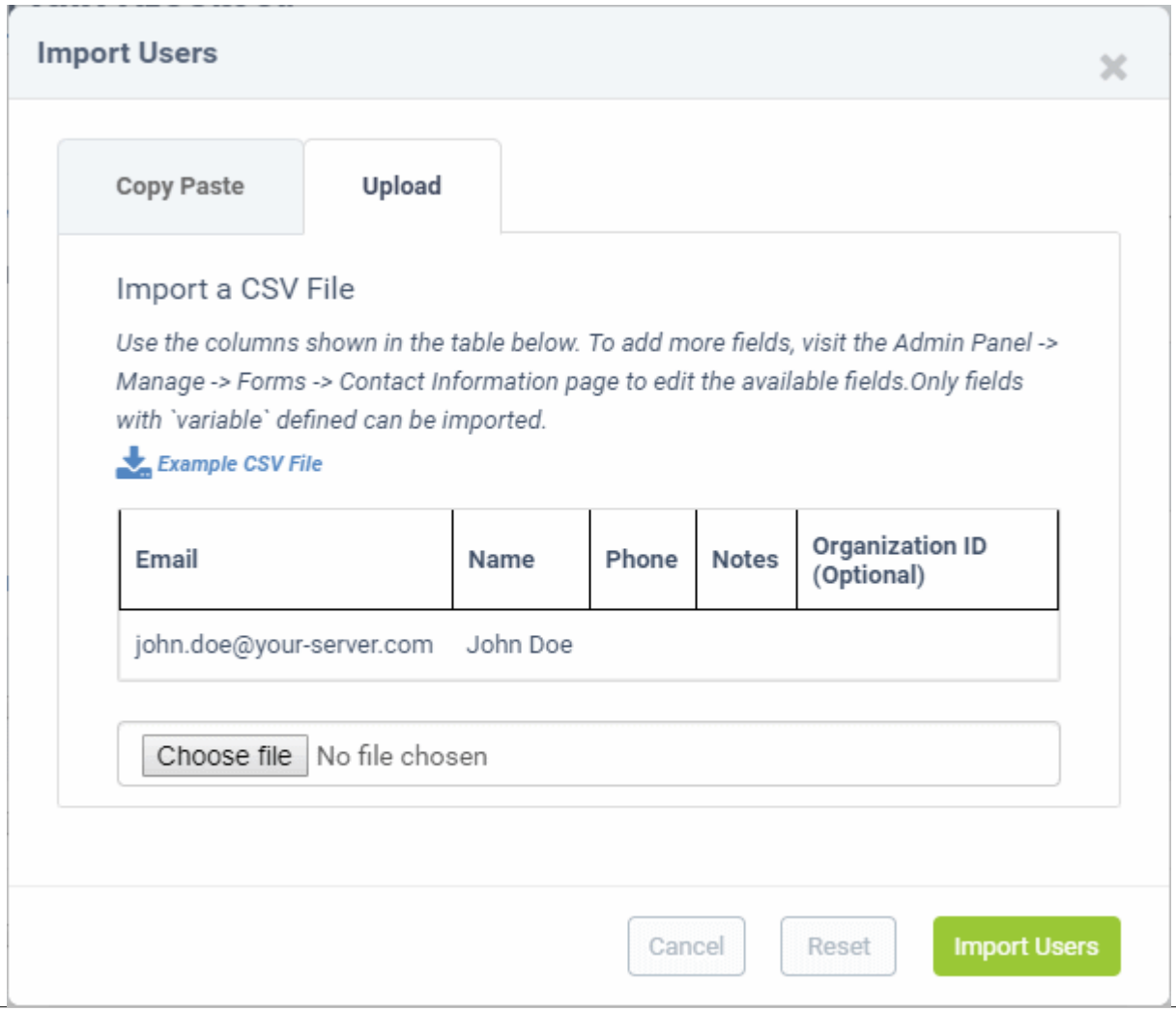
1. **Copy Paste** - Import users with name and email address only.
   - Enter the user's full name, followed by a comma, then their email address.
   - Add more users in subsequent lines.
   - Click 'Import Users' to add the users as guests.
2. **Upload** - Import users from a .csv file. More details can be added about a user with this method.
   - Create a .csv file of users that you want to import. The file should have the following column headers:

     Email,Name,Phone,Notes,Customer ID

     Note: Customer ID is mandatory for importing the user to the respective customer company. You can view

the ID for the customer from the 'Staff Panel' > 'Users' > 'Customers' interface.

- Each line should contain the contact information of a single user
- Save the .csv, then click 'Choose file' to upload the file to Service Desk:

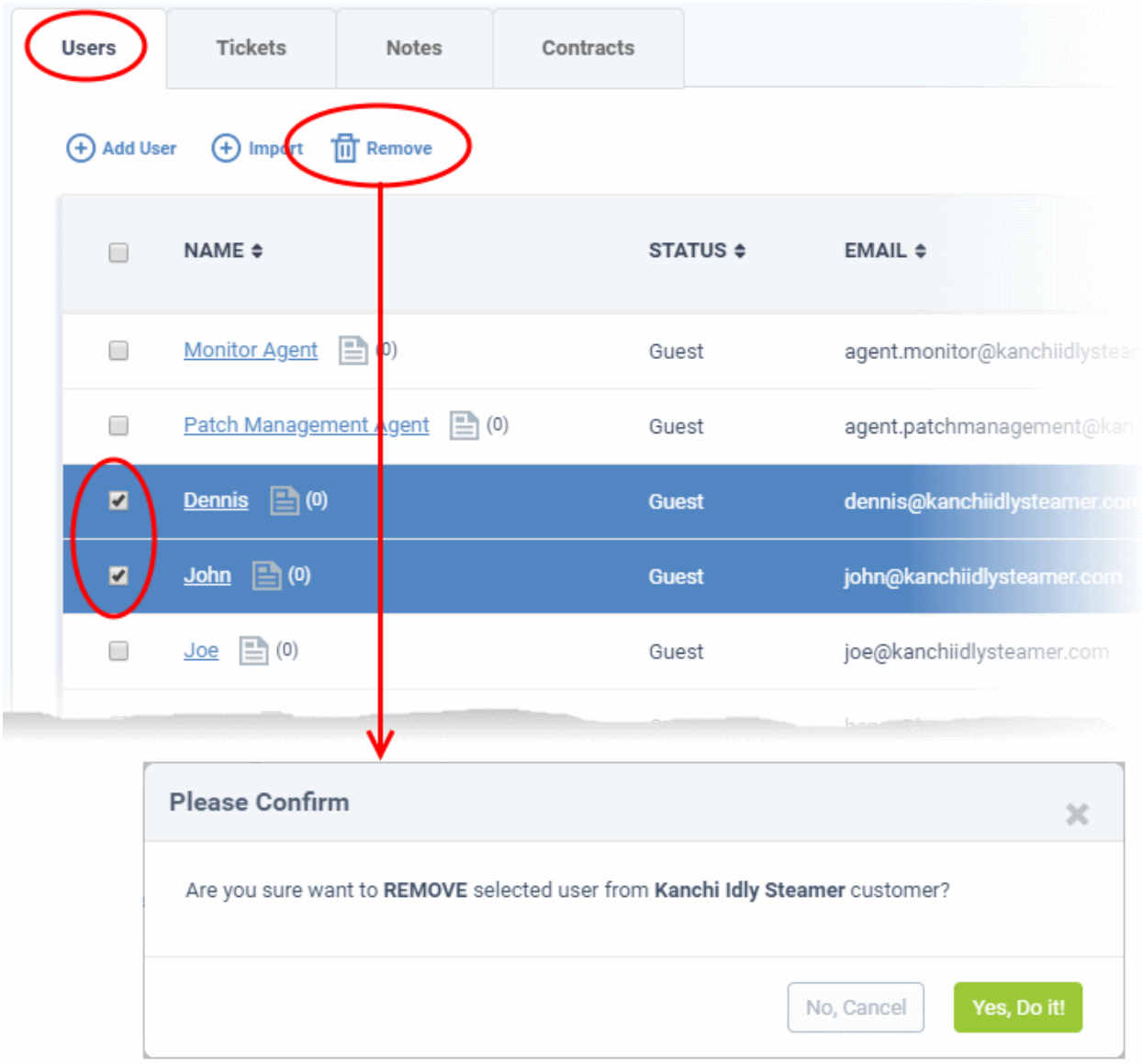


Tip : Click 'Example CSV File' to download a sample file.

- Click 'Import Users'. The users will be added to Service Desk and assigned to the customer company.
- Depending on your settings, imported users will be added as guests, or their account activation started.
  - You can configure default registration settings in 'Admin Panel' > 'Settings' > 'Users'. See **User Registration Settings** in Service Desk admin guide if you need further help with this.
- You can add more fields to the upload tab in 'Admin Panel' > 'Manage' > 'Forms' > 'Contact Information'. See '**Forms**' in Service Desk admin guide for more help with this.

Remove users from a company

- Click 'Users' > 'Customers'
- Click the name of a customer company to open its details interface
- Click the 'Users' tab to view a list of users belonging to the customer
- Select the users you want to delete and click the 'Remove' button

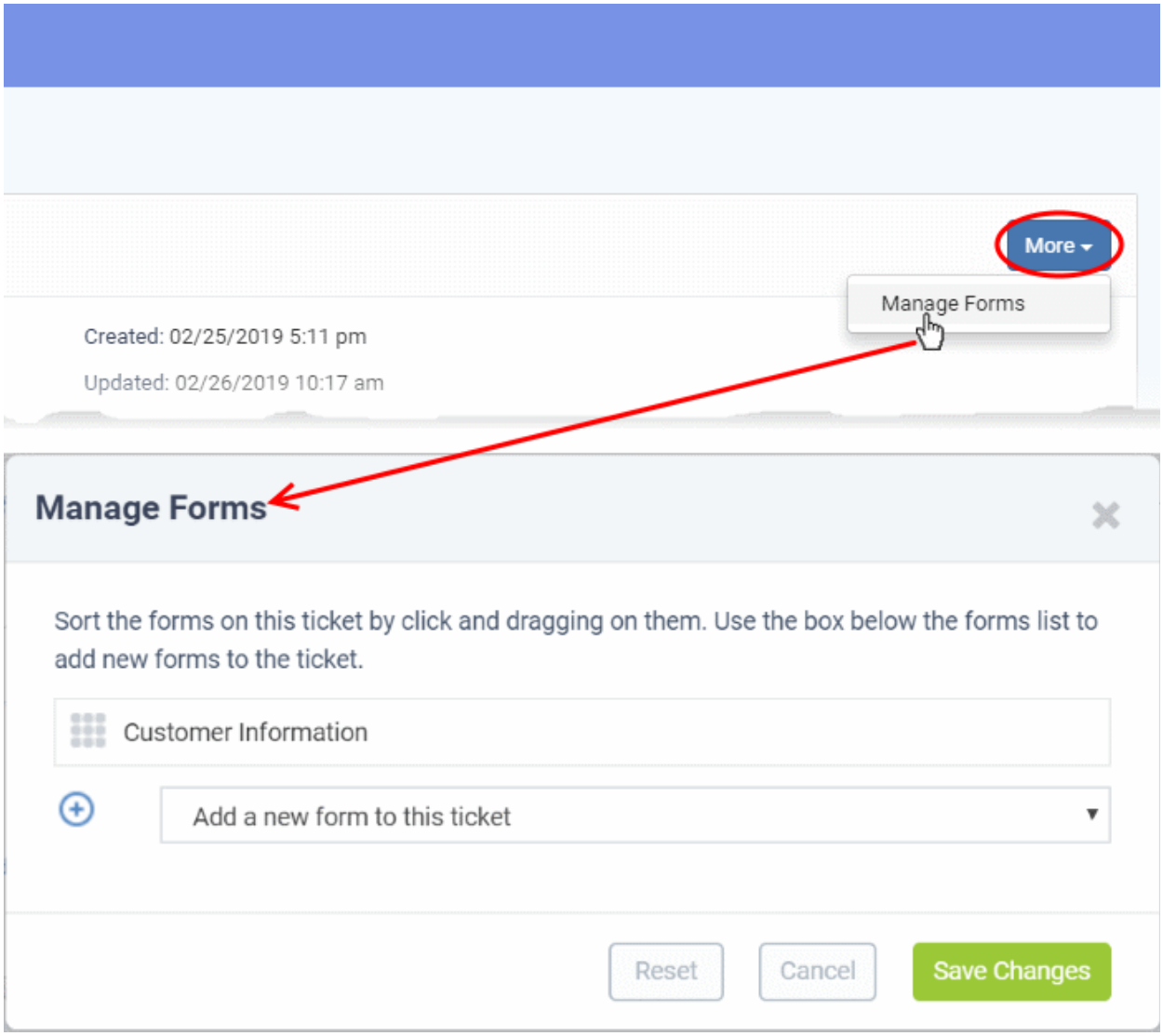


- Click 'Yes, Do it' in the confirmation dialog to remove the user.

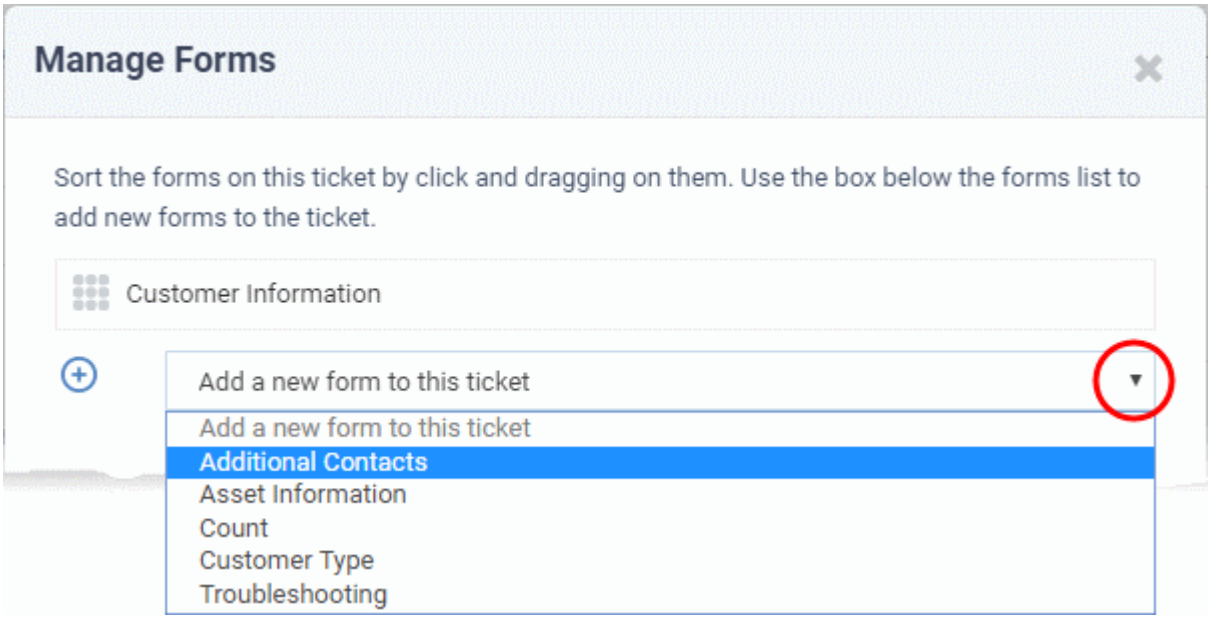
The user will not be able to login to the web portal and generate tickets.

Add additional details about a customer

- You can add extra fields to a customer's detail page so you can include more information about them.
  - **Prerequisite** - Admins must first create a custom form in 'Admin Panel' > 'Manage' > 'Forms' > 'Add New Custom Form'. See '**Forms**' in Service Desk admin guide for more help with this.
  - A 'form' can be as little as a single field, or can have multiple fields.
  - For example, you might create a form for a customer's Tax ID number, or a larger form for each of the company's 'C' level executives.
  - Once created, you can add these additional forms to any customer detail page.
- Click 'Users' > 'Customers'
- Click the name of a customer to open its details interface
- Click the 'More' button at top-right and choose 'Manage Forms':



- The drop-down contains all forms created in 'Admin Panel' > 'Manage' > 'Forms'
- Select the form you want to add from the drop-down.

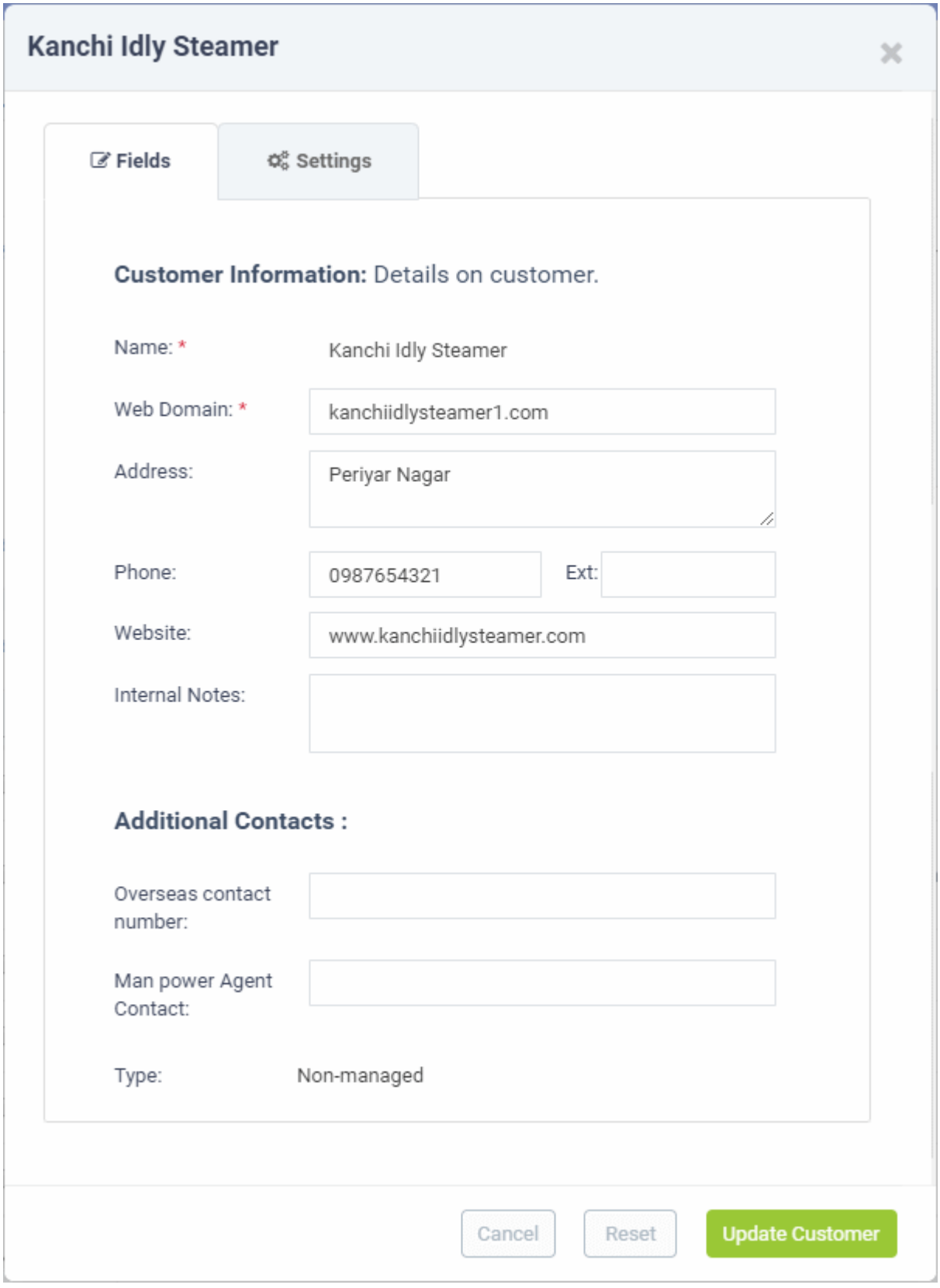


- Repeat the process to add more forms

- Drag-and-drop the forms to choose the order in which they appear on the details page.
- Click the 'Save Changes' button.

Admins and staff can complete the additional fields at any time:

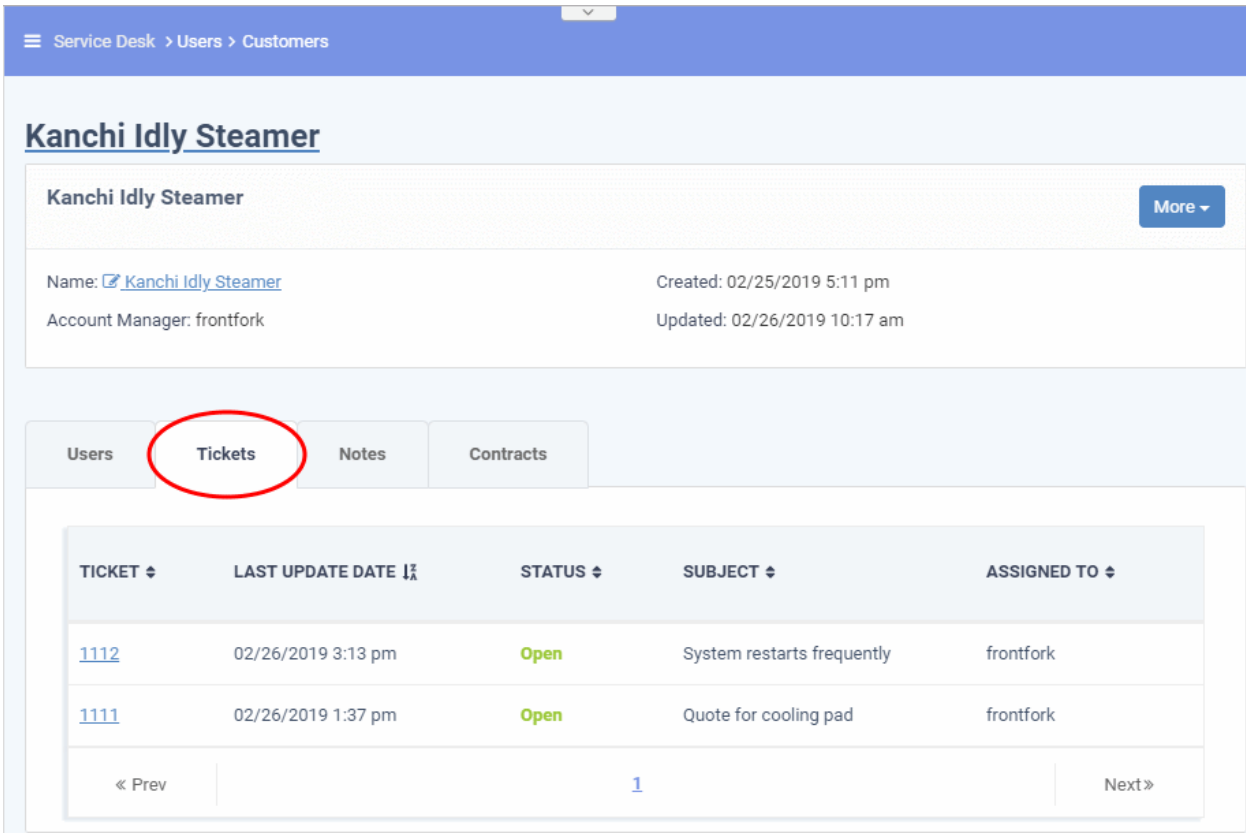
- Click 'Users' > 'Customers'
- Click the name of the customer to open its details page
- The new forms appear as configured:



- Complete the form and click the 'Update Customer' button at the bottom.

Manage tickets raised by users of a customer company

- Click 'Users' > 'Customers'
- Click the name of a customer company to open its details interface
- Click the 'Tickets' tab to view a list of tickets generated by users belonging to the customer



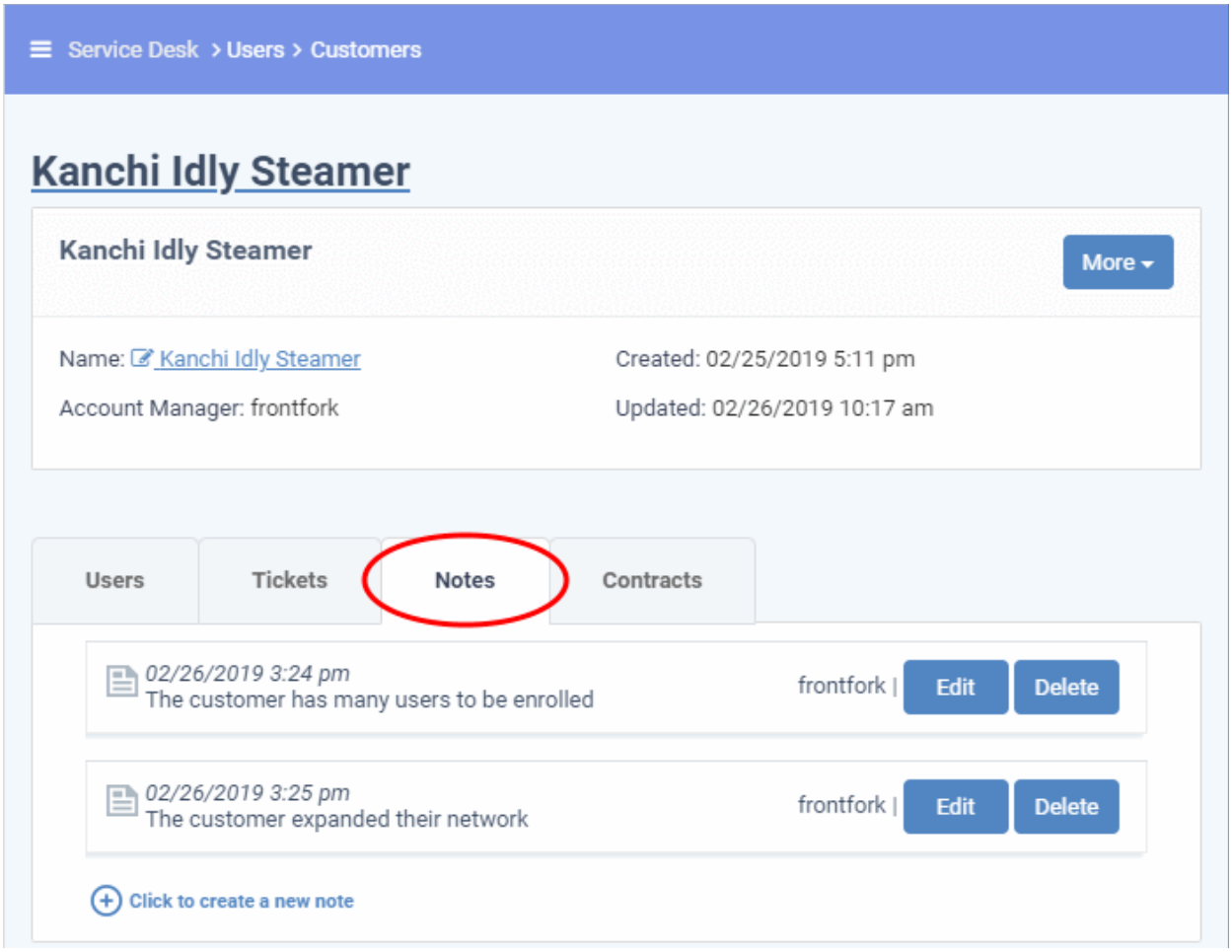
Column Headers

- **Ticket**: The number assigned to the ticket.
  - Click the ticket number to open the 'Ticket Details' screen. See '**Ticket Details**' for more details.
  - Place your mouse over a ticket number to view a preview of the ticket
- **Last Update Date**: The date and time of the most recent activity on the ticket.
- **Status**: Whether the ticket is open, closed, overdue or paused.
- **Subject**: An outline of the issue. This is entered in the 'Issue Summary' field in the web portal by the user.
- **Assigned To**: The name of the staff member to whom the ticket is allotted.

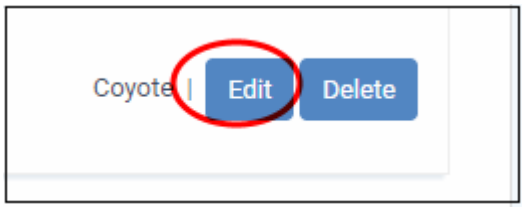
Manage notes for a customer

The 'Notes' feature lets you add general comments about a customer. Notes are internal, so they are only visible to staff members.

- Click 'Users' > 'Customers'
- Click the name of a customer company to open its details interface
- Click the 'Notes' tab



- Click the 'Click to create a new note' link, enter the required content and then click the 'Create' button at the bottom to add a new note.
- To view / edit a note, click the 'Edit' button at the far end of the note.



- Click the 'Save' button to save an edited note. Click 'Undo' to revert your changes.

- To delete a note, click 'Delete' at the far end of the note.

View service contracts associated with a customer

The 'Customer Details' interface lets you view contracts associated with a customer.

- Admins can create and manage contracts in 'Admin Panel' > 'Finance' > 'Contracts'

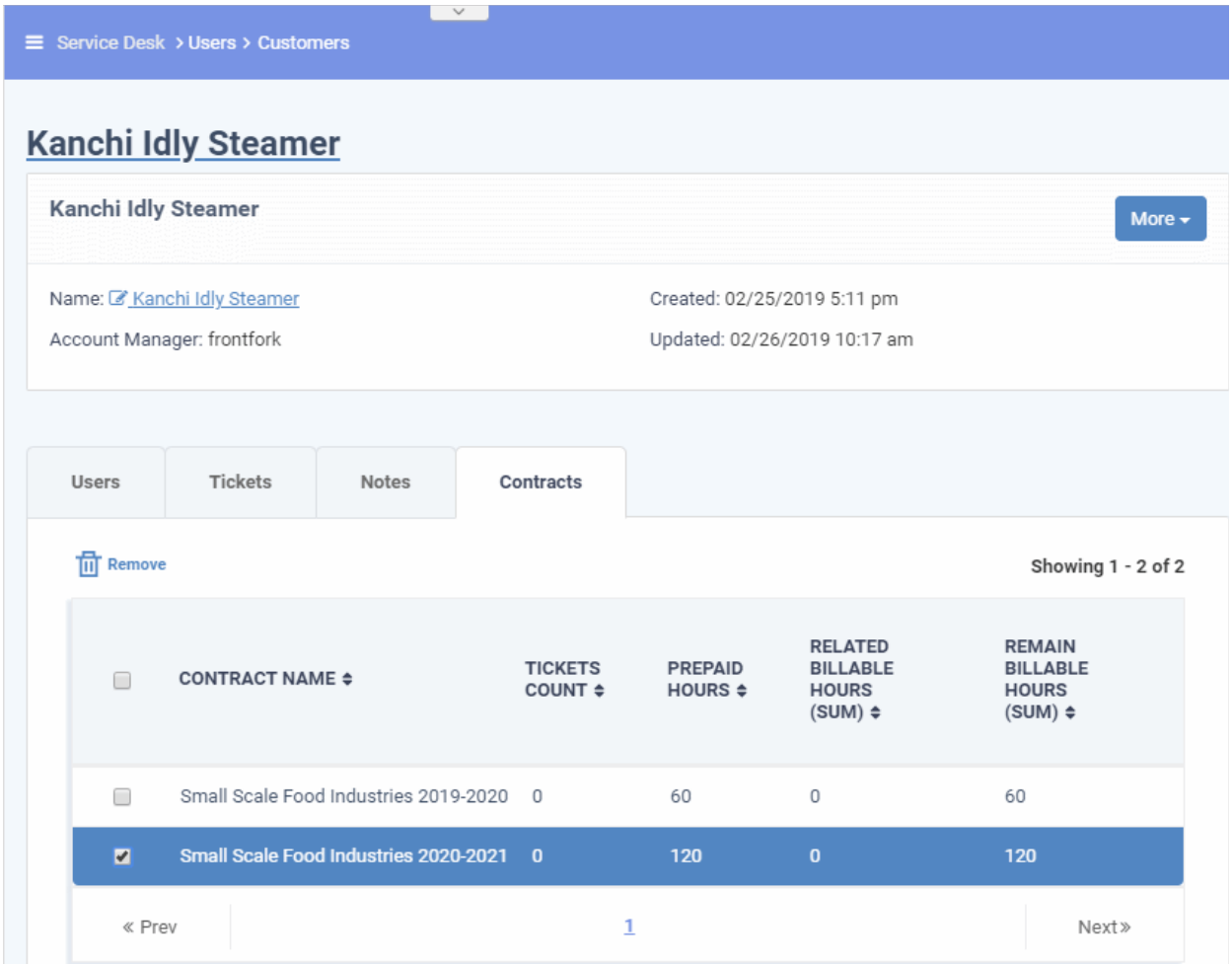
Service Contract

A service contract between you and a customer can include:

- A weekly/bi-weekly/monthly/yearly fee
- Pre-paid hours for different service types ('On-site', 'Remote' and 'Telephone'). These hours are 'included in the fee' a not charged to the customer.
- A charging plan for time that exceeds the pre-paid hours (optional). The charging plan includes:
  - Variable rates for specific types of service (optional).
  - A 'default' hourly rate which is applied to sessions not covered by a variable rate.
  - Charging plans are only applied after any pre-paid hours have been used up.
  - If no custom charging plan is applied then the default plan is applied. The default charging plan can be managed in 'Admin Panel' > 'Manage' > 'Charging'. See **Manage Charging Plans** in Service Desk admin guide for more details.
  - For more details on the service contracts, see **Manage Contracts** in Service Desk admin guide.

View a customer's contracts

- Click 'Users' > 'Customers'
- Click the name of a customer company to open its details interface
- Click the 'Contracts' tab



- **Contract Name**: The label of the contract created for the customer.
- **Ticket Count**: Number of tickets associated with the customer.
- **Pre-paid Hours**: The number of hours covered by the weekly / bi-weekly / monthly / yearly fixed fee mentioned in the contract.
- **Related Billable Hours** (Sum): Total chargeable hours spent by staff working on tickets for the customer on all three service types (Onsite, Remote and Telephone).
- **Remaining Billable Hours** (Sum): Amount of hours left of the customer's total pre-paid hours.

- To remove a contract from a customer, select the contract and click 'Remove' at the top

Remove Unmanaged Customers

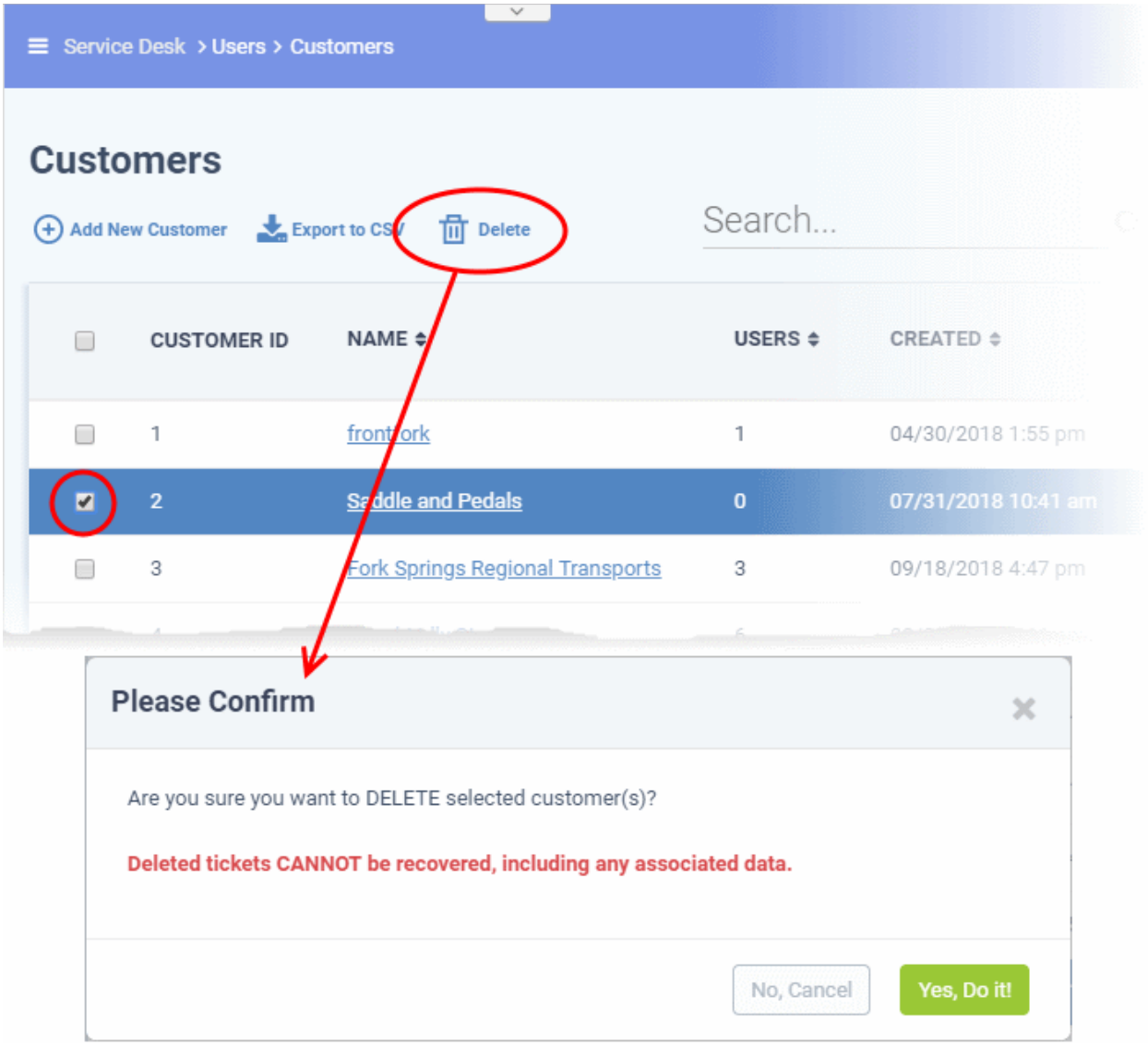
- Customers added via C1 are known as 'Managed' customers. They are automatically imported into Service Desk and cannot be removed. This is because they also appear in other products like Endpoint Manager.
- Customers added via the Service Desk interface are known as 'Unmanaged' customers. You can remove unmanaged customers because they only exist in Service Desk and not in other products.
    - You can only remove unmanaged customers that have no enrolled users. You need to delete all users from the customer before you can remove the customer itself.

Remove customers

- Click 'Users' > 'Customers'
- Select the customer you want to remove

Reminder: You must remove all users from a customer before you can remove the customer itself.

- Click 'Delete' at the top.

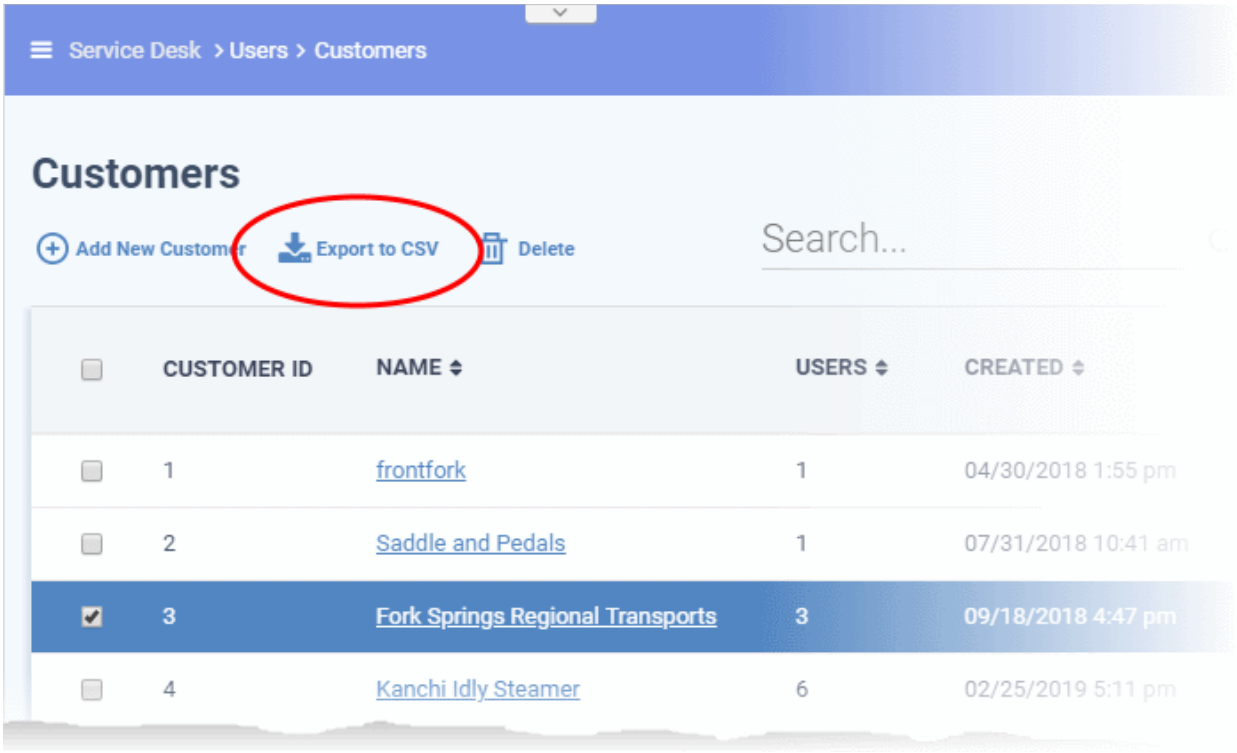


- Click 'Yes, Do it!' in the confirmation dialog

Export a customer list to CSV

You can save a list of all customers (managed and unmanaged) as a comma separated values (CSV) file.

- Click 'Users' > 'Customers'
- Click the 'Export' link at the top



2.3 Manage Tickets

The 'Tickets' tab allows staff (agents) to respond to tickets created by users.

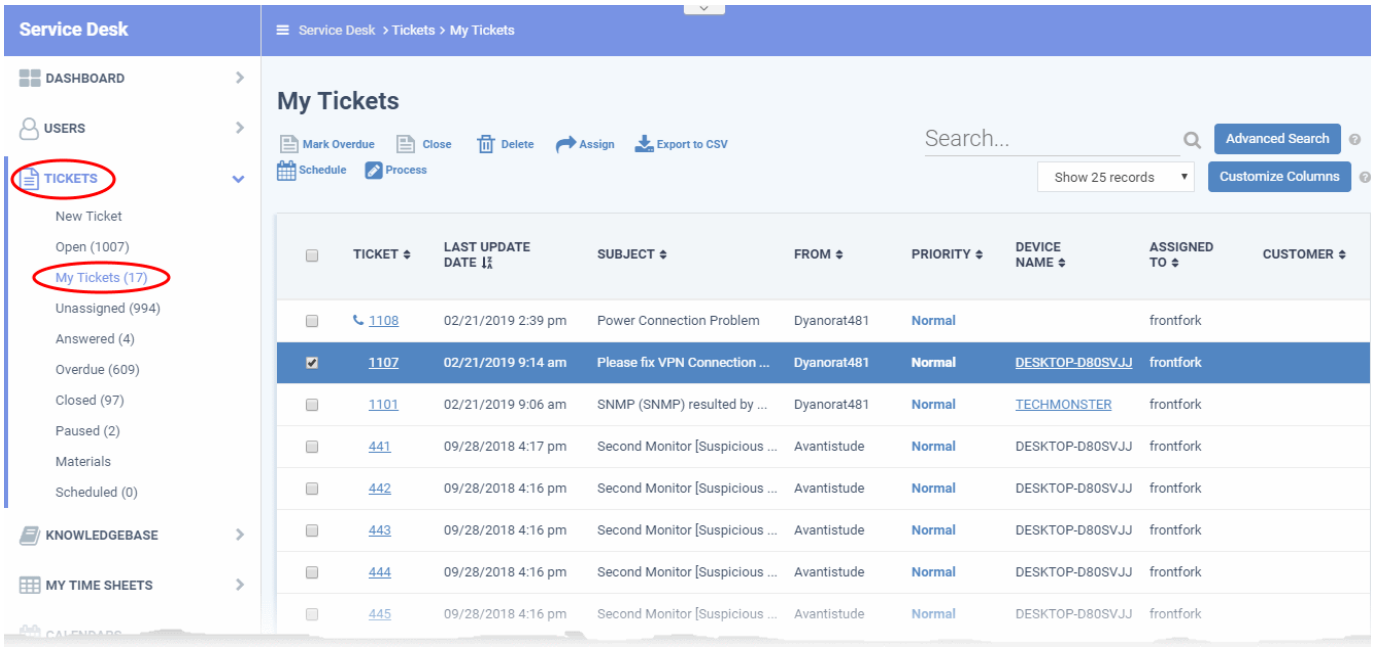
Tickets can be submitted to Service Desk using the following interfaces:

- **Web portal** - Registered users can login to the web portal at the help-desk URL and create a ticket. Guest users can also raise tickets at the portal if allowed by an administrator.
- **Email** - Users can create tickets by sending a mail to the default 'System Email' for your help desk.
- **Staff Panel** - Staff and admins can create tickets on behalf of end-users. This may be useful, for example, for requests that were made over the phone or by another out-of-band communication method. You can also create back-dated tickets for issues resolved in the past, but for which no ticket was created. Back-dated tickets are added with a 'Closed' status.
- **C1 modules** - Endpoint Manager can auto-submit tickets when certain conditions are met on a managed system. For example, create a ticket if the remaining disk space on an endpoint falls below a certain level.
    - Endpoint users can also submit tickets by right-clicking the EM icon in the system tray.
    - Such users are automatically added as guests in Service Desk if they are not already registered.
- **Custom applications** - Customers can integrate their systems with Service Desk by using the service desk API. Those integrated systems can then submit tickets to Service Desk.

To open the 'Tickets' interface:

- Click 'Tickets' on the left then click 'Open' (to see all open tickets)
- Alternatively, select one of the other ticket categories:
    - My Tickets
    - Unassigned
    - Answered
    - Overdue
    - Closed
    - Scheduled

- Paused



The 'Tickets' menu on the left contains the following filters and links:

- **New Ticket**: Allows the currently logged-in staff member or admin to create a ticket on behalf of a user. See **Create a new ticket on behalf of a user** for more information.
- **Open**: Tickets that are not yet resolved. Click the ticket number/subject to answer, transfer, reassign or schedule an open ticket.
  - 'Assigned' and 'Answered' tickets are excluded from this view if configured in 'Admin Panel' > 'Settings' > 'Tickets' interface. See '**Ticket Settings and Options**' in the Service Desk admin guide for more details.
- **My Tickets**: Tickets that are assigned to the person that is currently logged-in. Click the ticket number/subject to answer, transfer, reassign, schedule or register time-spent on a ticket.
- **Unassigned**: Tickets that have not yet been assigned. Admins can assign tickets to staff members by clicking the ticket number/subject then clicking the 'Assign' link at the top. See **Bulk assignment of tickets to a staff membe**r for guidance on this.
- **Answered:** Tickets for which there has been at least one reply. Answered tickets can be reviewed, reassigned, transferred and more by clicking the ticket number or subject.
- **Overdue:** Tickets that are not closed within the stipulated period per the SLA plan.
  - Overdue tickets will be closed automatically if set in the 'Admin Panel' > 'Settings' > 'Tickets' interface. See '**Ticket Settings and Options**' in the Service Desk admin guide for more details.
- **Closed**: Tickets that are resolved and completed. Closed tickets can be reviewed, reopened, reassigned and more by clicking the ticket number or subject.
- **Scheduled** - Tickets that have a fixed timetable. The schedule will be displayed in the staff member's calendar. Scheduled tickets can be answered, re-assigned, transferred, re-scheduled, and more by clicking the ticket number/subject.
- **Paused:** Tickets that are not being worked on at the current time. Paused tickets can be resumed by the same staff member or an admin. A paused ticket can be resumed by clicking the ticket number then clicking the 'Resume' button.
- **Materials**: View details of material costs and other expense items added to tickets by staff, with their approval status. See **View Details of Materials/Expense Items added to Tickets** for more details.

The columns in the ticket interface depend on the filter you have chosen. You can change the columns shown by clicking the 'Customize Columns' button. The following is a list of all possible columns:

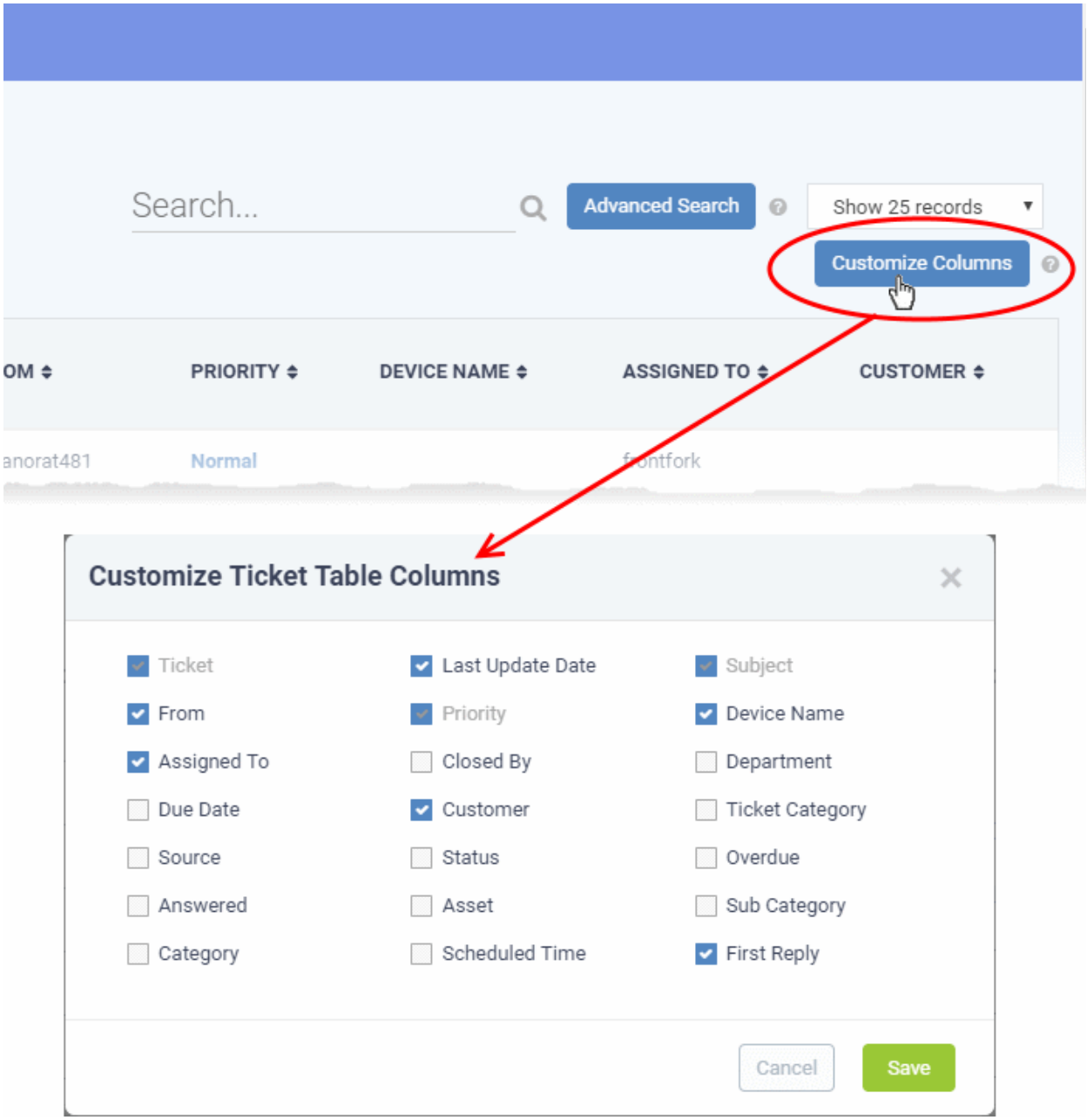
Tickets - Table of Column Descriptions	
Column Header	**Description**
Ticket	The number assigned to the ticket. Clicking the ticket number will open the 'Ticket Details' screen. • - Tickets that were raised via the web portal. • - Tickets that were raised via email. • - Tickets that were raised by staff members on behalf of users.
Last Update Date	The date and time at which ticket was created, reopened, last updated or closed.
Subject	A brief description of the issue. • In many cases, the subject will have been specified by the user or staff member who created the ticket. This is done in the 'Issue Summary' field of the 'New Ticket' interface. • The subject of tickets that were created by another C1 module will simply say which module spawned the ticket. For example, 'RMM Generated Ticket'. • The icon in the subject column indicates that one or more collaborators have been added to the ticket CC list
From	The name of the user that raised the ticket.
Priority	The criticality of the ticket. • Ticket priority depends on the settings in 'Ticket Category', 'Department' and 'Ticket Filters'. • Tickets raised via email can have their priority set by the sender's mail client if enabled in 'Admin Panel' > 'Settings' > '**Emails**' (see the 'Incoming Emails' section). • If no custom settings apply, then tickets are given the default priority of 'Normal'.
Device Name	The label of the endpoint for which the ticket was generated. • The device name is shown only for tickets created by Endpoint Manager. • Click the device name to view the Device Summary interface for the device in Endpoint Manager. • The 'Device Summary' interface contains general device information, including operating system details, hardware details, last activity, Comodo Client - Security (CCS) configuration, resource usage and more. • See **http://help.comodo.com/topic-399-1-786-10175-View-Summary-Information.html** for more details of the information contained in this interface.
Assigned To	The name of the column header depends on the ticket status that you have selected. For example, for 'Unassigned' tickets the column header will be 'Department'. • Assigned To: The name of the staff member to whom the ticket is assigned • Department: The name of the department to which the ticket is assigned

Tickets - Table of Column Descriptions	
Column Header	**Description**
Customer	The company of the user who raised the ticket
Source	The channel through which the ticket was created. Possible channels are: • Phone • Email • Other • Web • API
Sub Category	Sub-categories are specific topics grouped under a main support topic. For example, 'My toaster keeps burning the toast' might be a sub-category of 'Toaster Help'. It is optional for you to create sub-categories of a support category. Sub-categories are selected by users when they submit their ticket.
Department	The department of your company to which the ticket is assigned
Due Date	The date and time by which the ticket should be closed.
Closed By	Staff member who closed the ticket.
Status	Ticket progress. Possible values are: • Open • Answered • Overdue • Closed • Paused
Ticket Category	Displays the help topic on which the user requested support. See **ticket category** for more details.
Overdue	Indicates whether the ticket was not closed on or before the due date.
Answered	Indicates whether a response has been given to the user for the reported issue.
Asset	The product, service, or item that the ticket concerns.
Category (Ticket Type)	The support category of the ticket. The possible values are: • Alert • Order • Problem
Sub-Category	Specific issue type as chosen by the person who created the ticket. For example, 'Overheating' may be a sub-category of 'Problem'.
Scheduled Time	Date and time at which the ticket will be attended to.
First Reply	Date and time of the first response to the user.

Add or Remove Columns

The columns displayed by default depend on the ticket filter chosen on the left. You can add more columns if you want to view additional details and hide columns that you do not want to be displayed.

- To add or remove columns, click the 'Customize Columns' button:



- Use the check-boxes to enable or disable columns as required
- Certain columns are mandatory for certain views
- Click 'Save' to add/remove the selected columns to the list

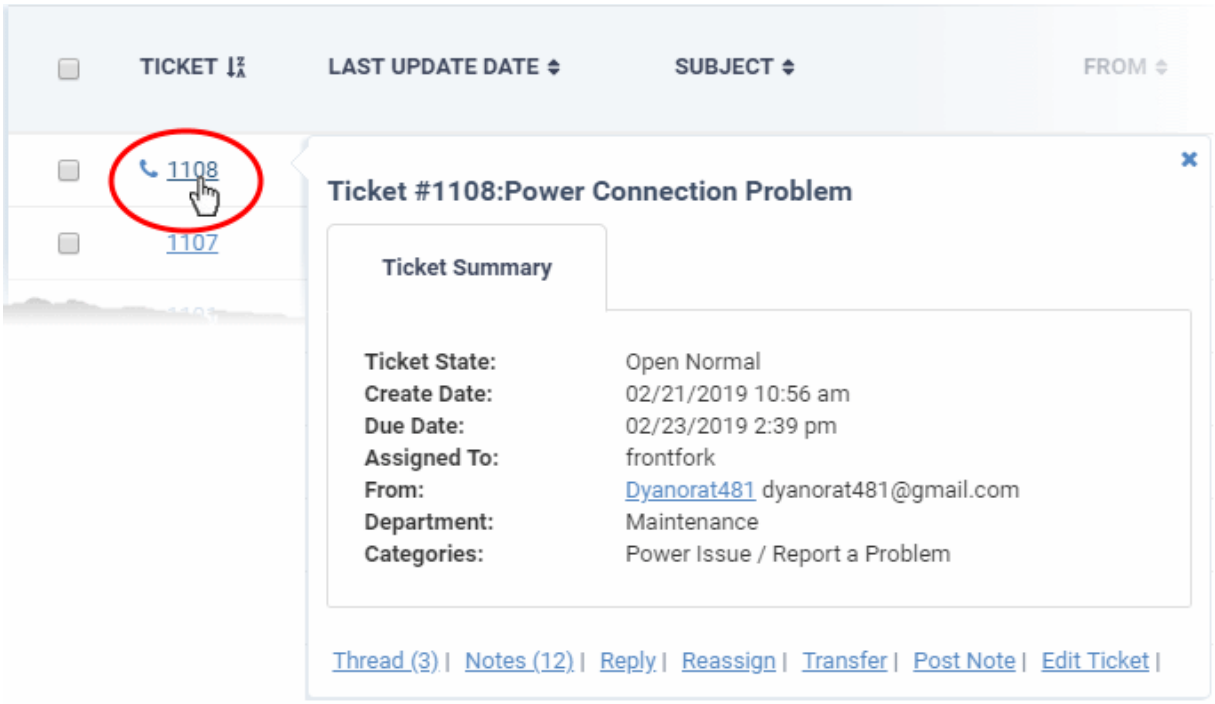
The following sections explain more about managing tickets and creating a new ticket:

- **View a short summary of a ticket**
- **Process a ticket**
- **Schedule a ticket**
- **View Materials/Expense items added to a ticket**
- **Export tickets list to a CSV file**

- **Assign tickets to a specific staff member**
- **Create a new ticket on behalf of a user**
- **Sorting and filtering options in the 'Tickets' interface**

View a Short Summary of a Ticket

- Place your mouse cursor over a ticket to view brief details:



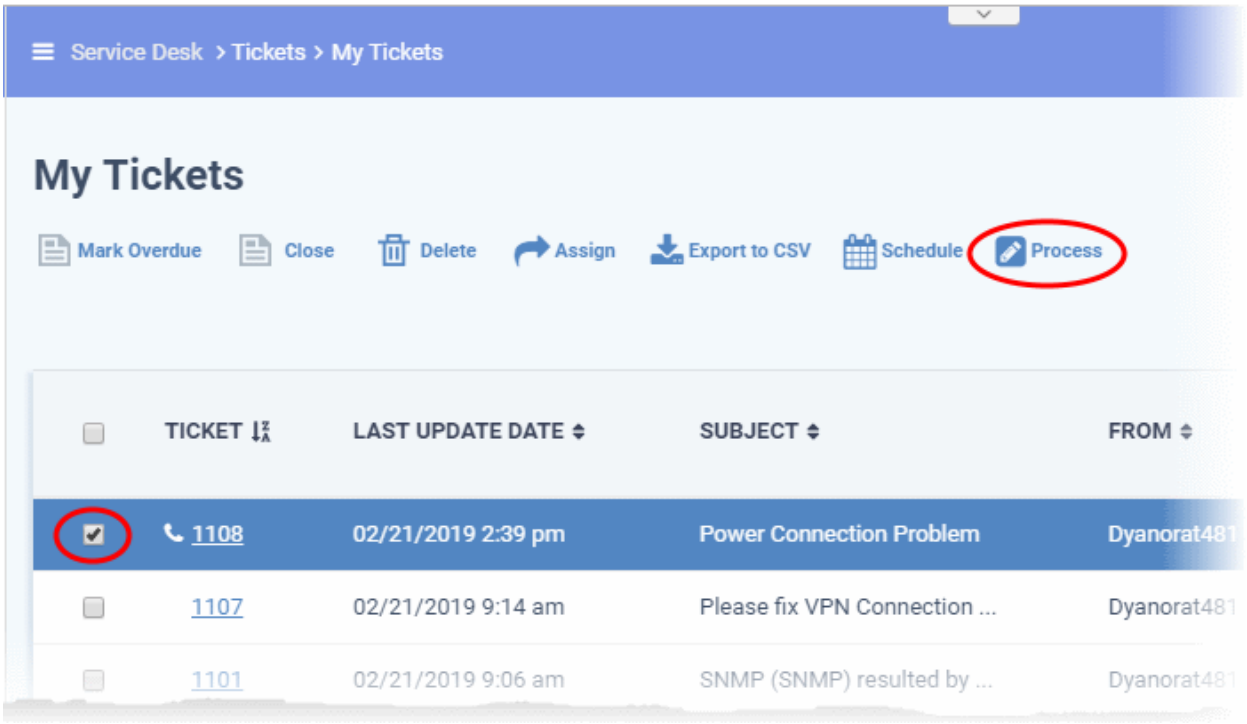
The links at the bottom allow staff members to manage the ticket. See '**Ticket Details**' for more details.

Process a Ticket

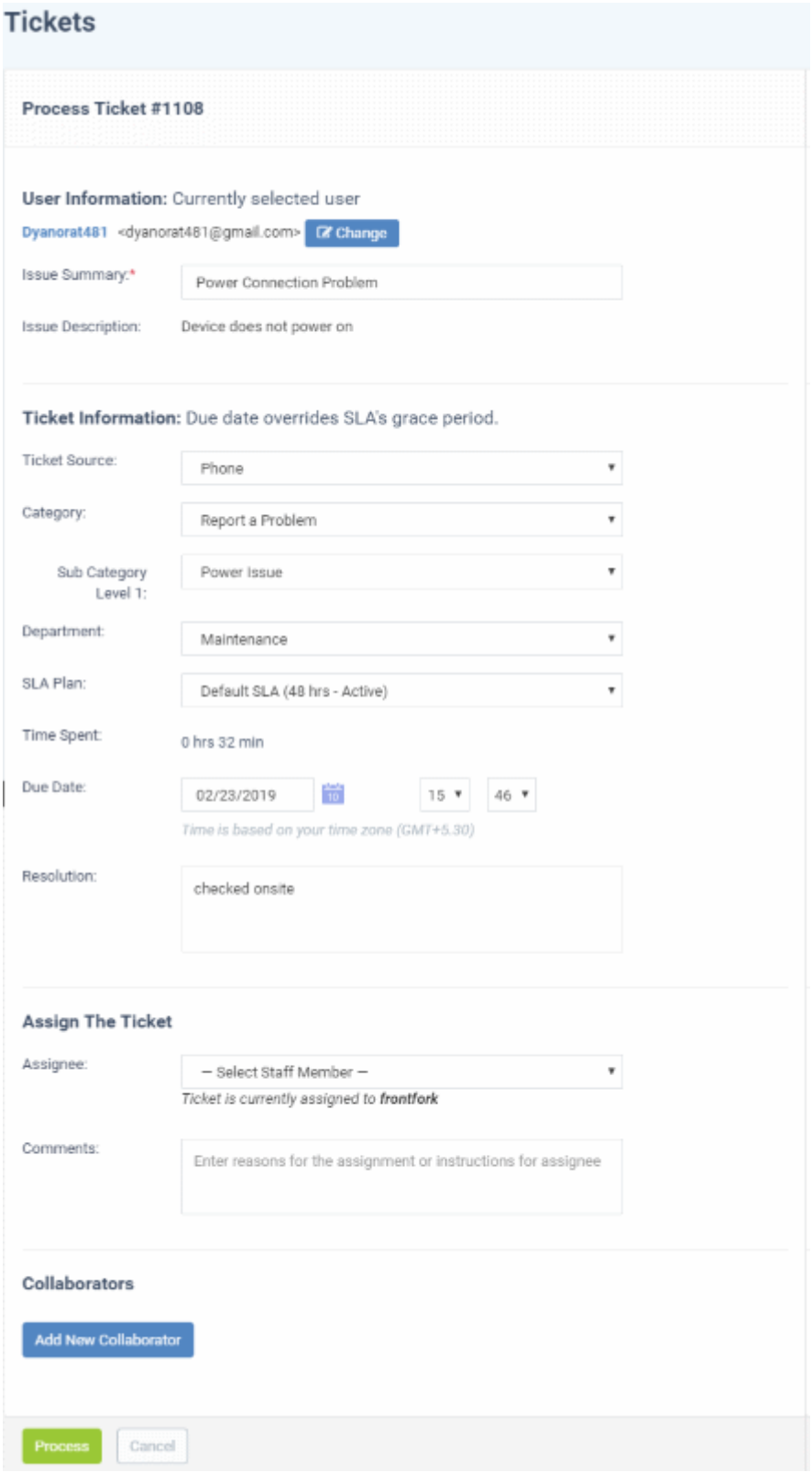
- The 'Process' feature allows you to quickly update ticket details. You can reassign ticket to a different staff/administrator, update items such as user information, ticket category, department, collaborators and more.
- Alternatively, you can also edit individual tickets by opening the ticket and clicking the 'Edit' button.
- This feature is available for all ticket categories except closed tickets.

Use the process option

- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Select a ticket and click 'Process' at the top:



The 'Process Ticket' screen opens:



User Information

- **User name:** The person who submitted the ticket or for whom the ticket was created. This is is pre-populated. Click 'Change' to select a different user.
- **Issue Summary:** Brief description of the issue. Update if required.
- **Issue Description:** Ticket description provided by the creator of the ticket. This is not editable.

Ticket Information

- **Ticket Source:** The channel through which the ticket was created. The options available are 'Phone', 'Email', 'Web', 'API' and 'Other'. This is pre-populated and can be updated if required
- **Category:** The help topic under which this ticket falls. This is pre-populated and can be updated if required.
- **Sub Category** - Specific issue type as chosen by the person who created the ticket. For example, 'Overheating' may be a sub-category of 'Problem'.
- **Department:** The department to which to the ticket is currently assigned. This is pre-populated and can be updated if required.
- **SLA Plan:** The service level plan associated with the ticket. Use the drop-down menu to change the plan if required. The option chosen here will prevail even if the SLA plan for the 'Ticket Category' and 'Department' is different.
- **Time Spent** - Cumulative time spent on the ticket by all contributing staff members. This total includes time recorded automatically during a session and time manually added by administrator/staff.
- **Due Date:** The date and time by which the ticket should be closed. Change the date and time if required. This will override the date generated by default.
- **Resolution:** A description of the fix/solution. This could also be a description of the steps taken so far, and those that remain, in order to bring about a fix. This is set by the staff member attending to the ticket. Change the resolution if required.

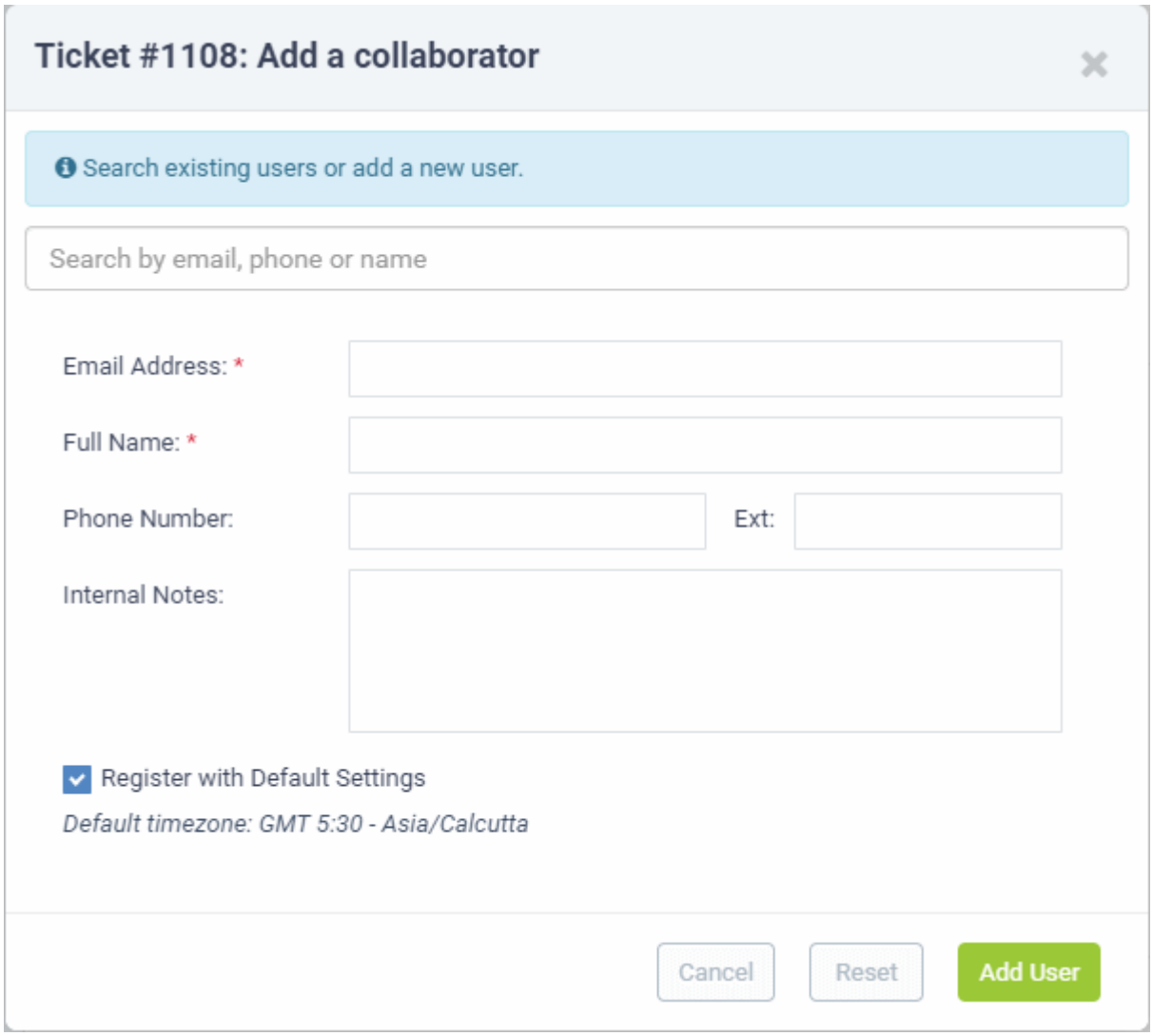
Assign the Ticket

- **Assignee:** Person who is currently responsible for the ticket. You can change the assigned staff member if required.
- **Comments:** Enter instructions for the assignee or reasons for the assignment.

Collaborators

Add people who also worked on the ticket as additional recipients for ticket updates.

- Click 'Add New Collaborator' to associate new or existing users with the ticket.



- To add an existing user/staff, type the first few letters of their username/email address in the 'Search' box at the top and select the user from the options
- To add a new user, enter the email address, full name and other details
- Click 'Add User'
- Repeat the process to add more collaborators

- Click the 'Process' button after you have made your changes. The ticket will be updated per the new details.

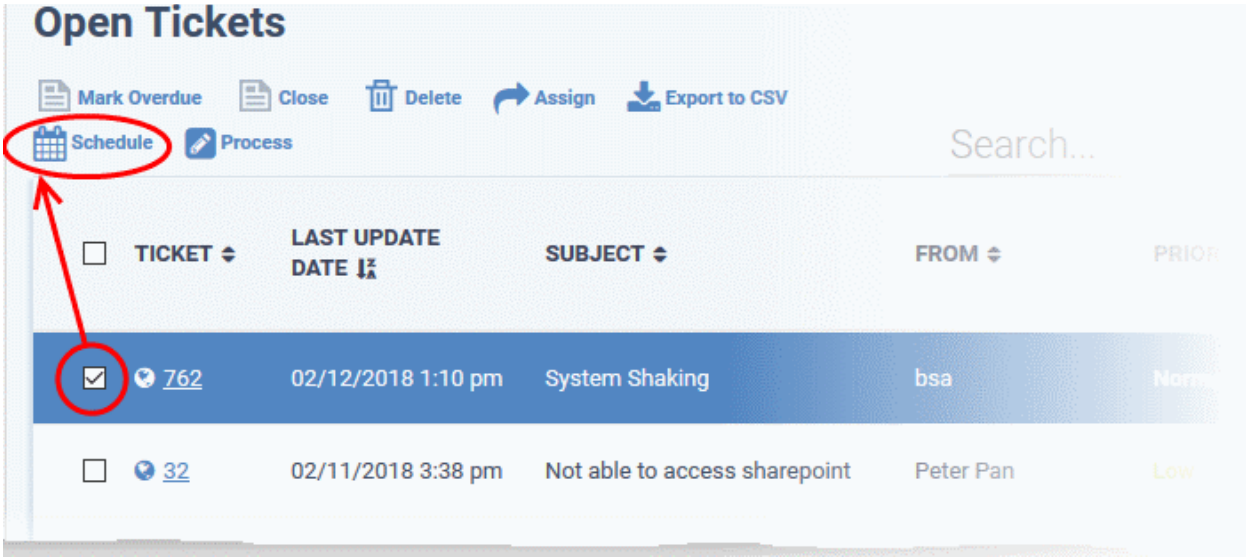
Schedule a Ticket

A scheduled ticket is useful for tasks that will be started at a set time in the future, like a site visit for example.

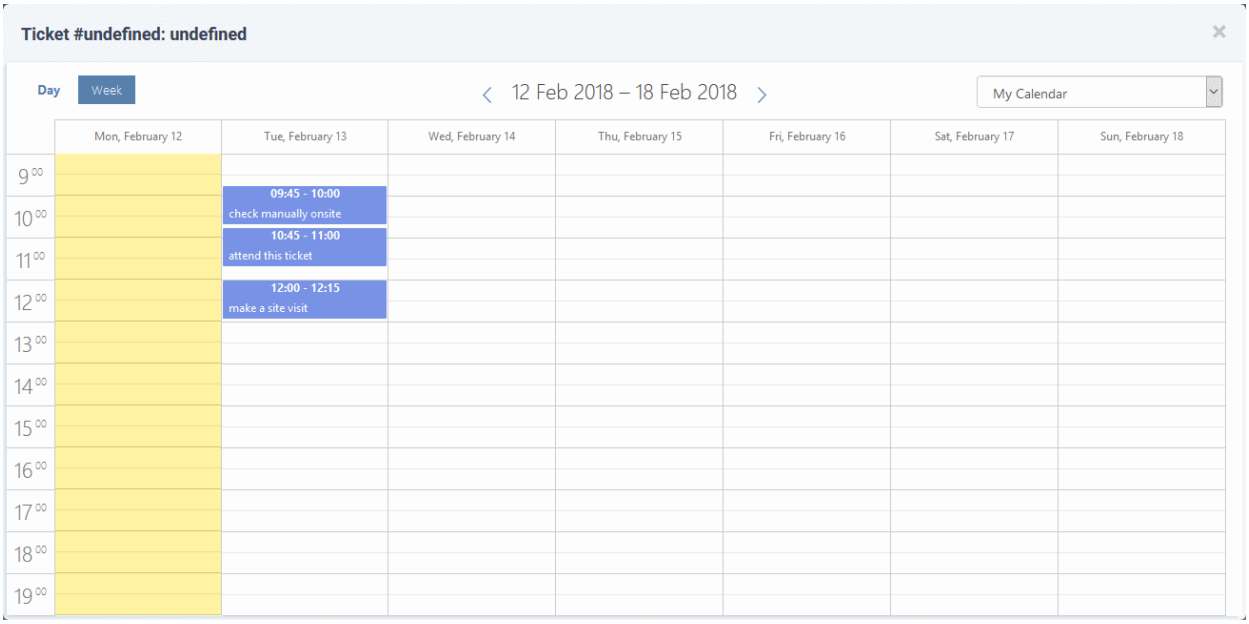
- The schedule will be added to the calendar of the currently logged-in administrator/staff.
- The ticket will be assigned to the person who creates the schedule, even it it is currently assigned to someone else.
- The ticket can be rescheduled to a different time period from the 'Ticket Details' interface.

To create a schedule for a ticket

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Select a ticket and click 'Schedule' at the top:

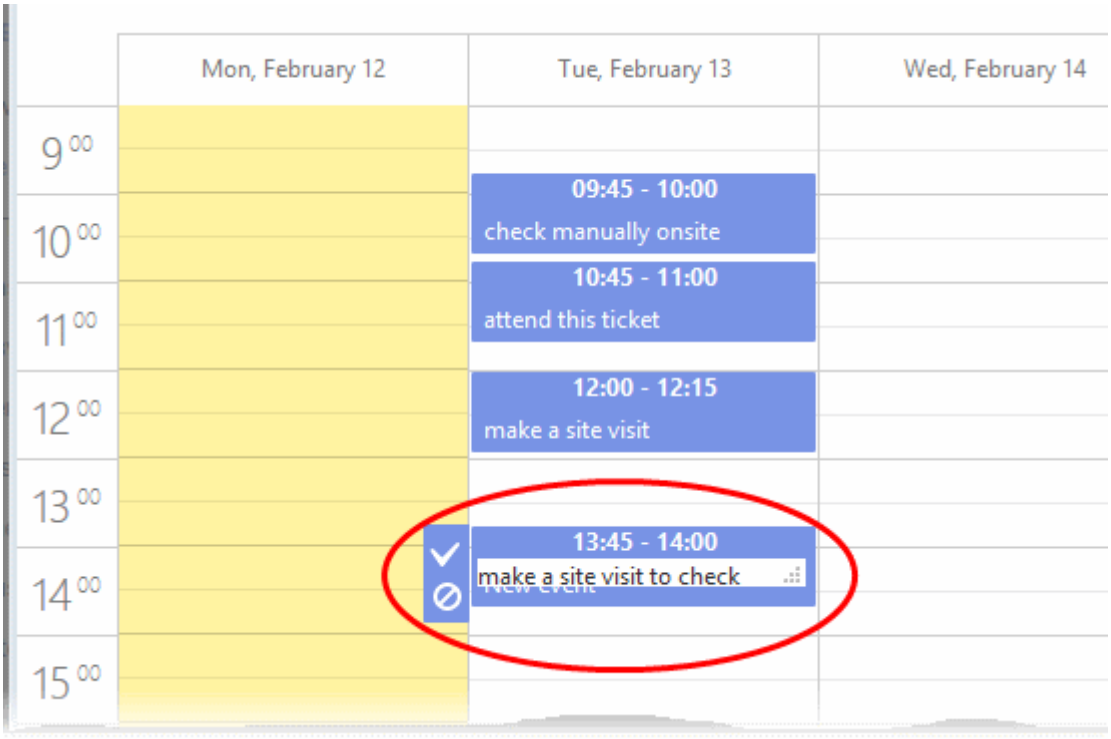


The calendar for the currently logged-in admin/staff will open. The ticket details will be displayed on the title bar:



- By default, the current week will be displayed. You can view the current week or day by clicking the respective button above the calendar.
- To move to next week/day, use the '>' buttons on the top

- Double click on the cell that represents the time slot on which you wish to fix appointment for the ticket
- Enter a short description for the task to be executed.



- Click the tick mark to save the schedule

The appointment will be added to the calendar. You can view your calendar from the 'My Calendar' interface. See **Manage Calendars** for more details.

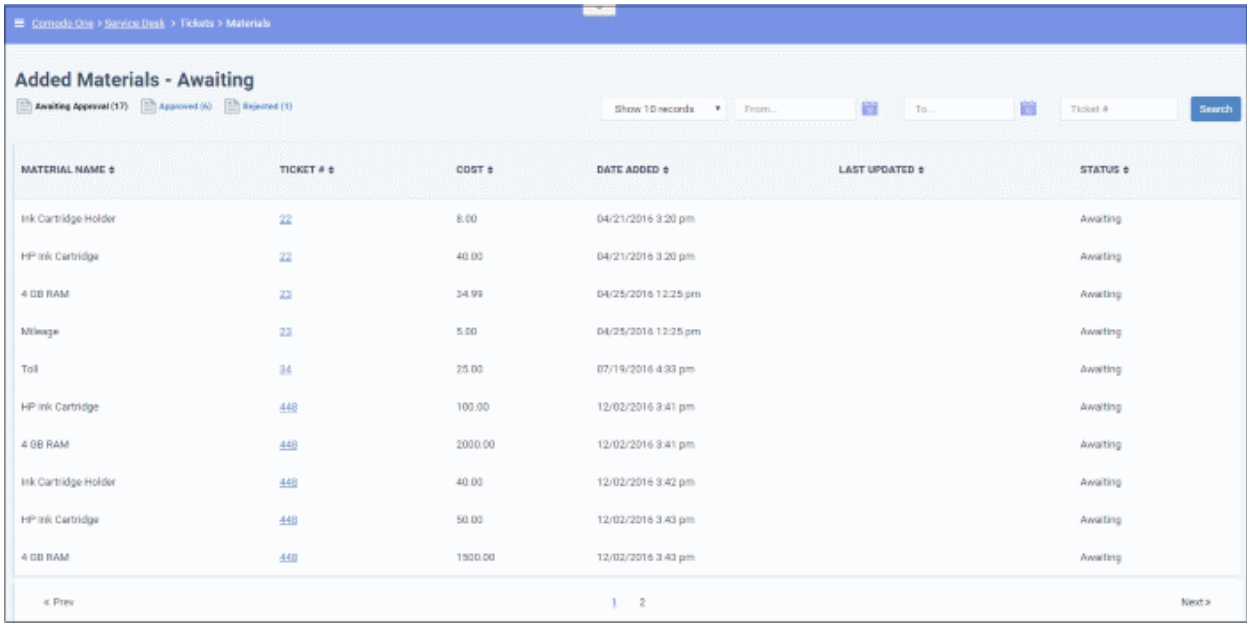
The ticket will be moved to the list under the 'Scheduled' category on the left.

View Materials/Expense Items added to a Ticket

The 'Tickets' section lets staff and admins view any costs added to a ticket. Admins must approve expense items in order for them to be billed to the customer company.

View ticket materials/expenses

Click 'Tickets' on the left then select 'Materials':



Column Headers

- **Material Name** - The name of the material or the expense item
- **Ticket #** - The number of the ticket to which the material or expense item was added. Click the ticket number to view or update the ticket. See **Ticket Details** for more details.
- **Cost** - The cost of the material/expense item as entered by the staff member
- **Date Added** - The date and time at which the item was added to the ticket
- **Last Updated** - The date and time at which the item details were last updated by the staff member
- **Status** - Indicates whether the material/expense was approved by the administrator. The possible states are:
    - **Awaiting** - The expense item has been added to a ticket but has not yet been approved by an administrator.
    - **Approved** - The expense item has been added to a ticket and approved for billing by an administrator.
    - **Rejected** - The expense item has been rejected by an administrator.

Sorting and Filtering Options

- Click a column header to sort items in ascending/descending order

You can search for items based on the date range within which the items were added and the tickets to which they were added.

- To filter items based on their addition date range, enter the Start and End dates of the period by clicking the calendar icons beside the From and To fields
- To filter the items based on the ticket to which they were added, enter the ticket identification number in the Ticket # field

You can use more than one filter option at a time.

- Click 'Search'
- To view the full list again, clear the search criteria or, simply click the respective 'Approval' link at the top.

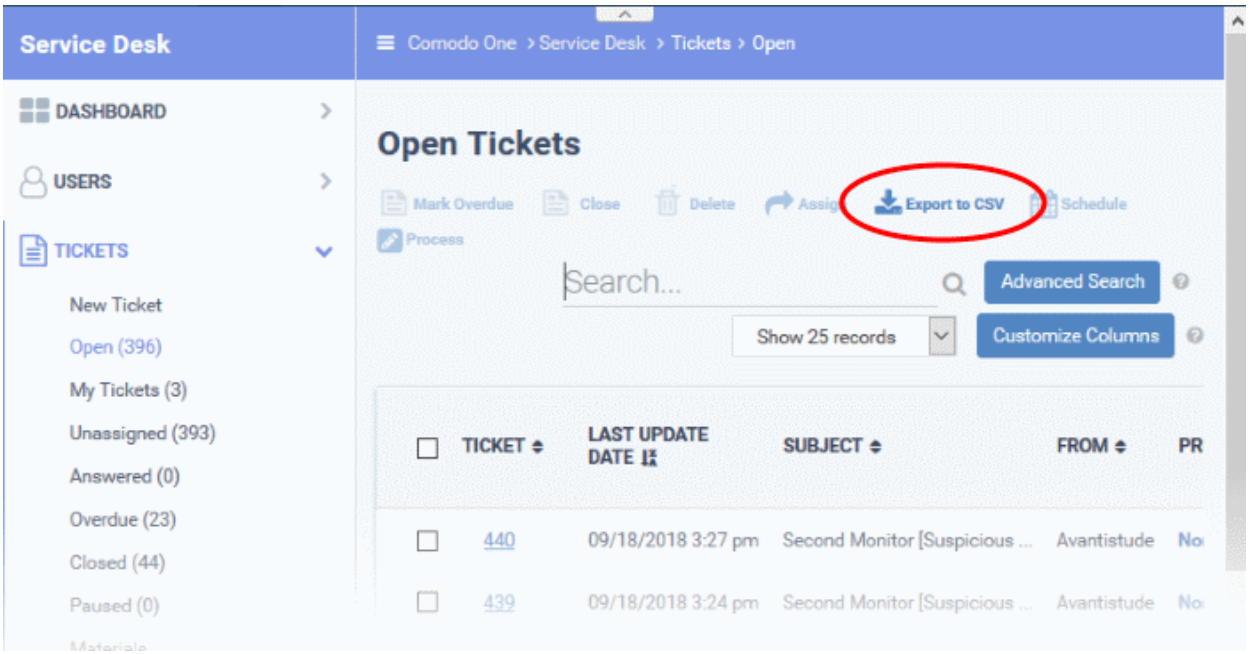
The 'Show records' drop-down on the right allows you to select the number of entries to be displayed per page. The options range from 10 records per page up to 100. The default value can be set in the '**My Profile**' interface. You can navigate to different pages by clicking 'Next' and 'Prev'.

Export tickets to a CSV file

You can save the list of tickets as a comma separated value (CSV) file for archiving and analysis purposes.

To save the list of tickets

- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the 'Export' link at the top



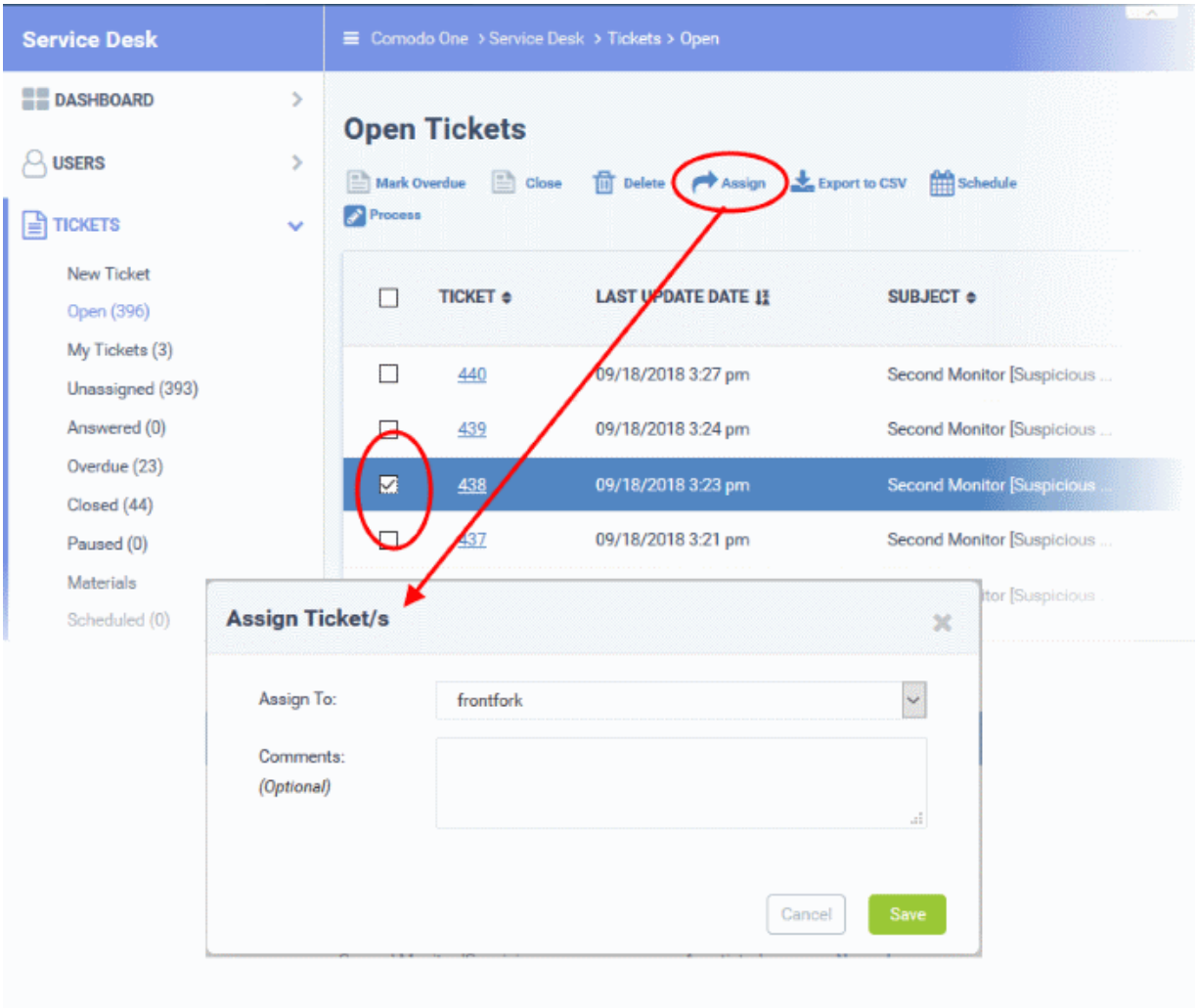
The list will be downloaded as a .csv file. The file can be opened with spreadsheet applications like Microsoft Excel and OpenOffice Calc.

Assign Tickets to a Staff Member

- Admins can assign/reassign individual or multiple tickets to a staff from the 'Tickets' interface.
- The ticket will appear in the 'My Tickets' area of the person to whom it is assigned.

Assign a ticket

- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Select one or more tickets and click 'Assign' at the top



- **Assign to** - Select the admin/staff member to whom you want to assign the ticket
- **Comments** (Optional) - Enter a reason for assigning the ticket or other notes about the task. The comment will be added as an internal note to the ticket.

- Click 'Save'

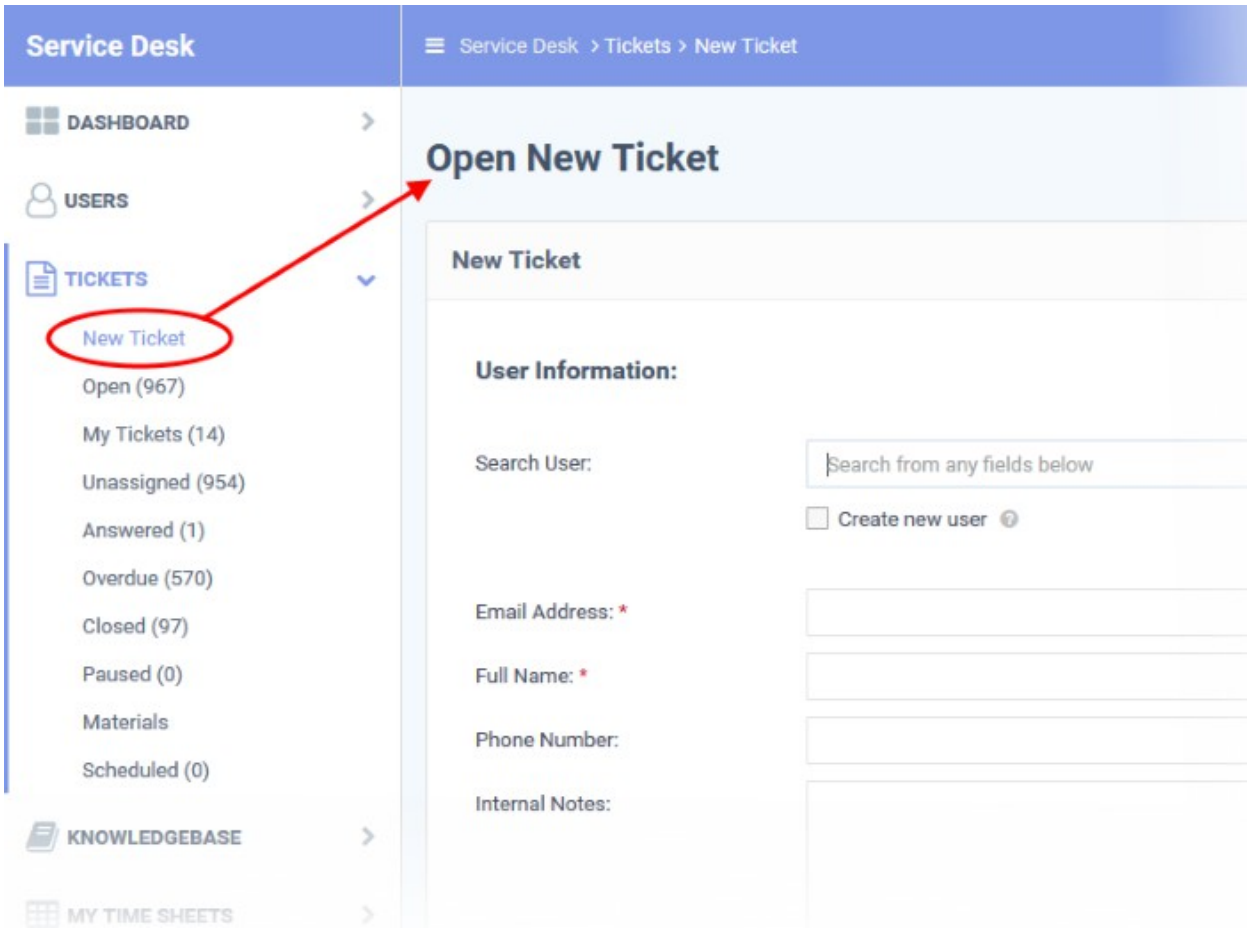
Create a new ticket on behalf of a user

- Staff and admins can create tickets on behalf of users from the 'Tickets' interface.
- Staff can also create tickets for issues that they resolved, but which had no ticket. This is useful to record time spent/materials used and bill accordingly.
  - Select 'Work done in the past' to enable this option.
  - Tickets created for already completed tasks will have a status of 'Closed'.
- For more details, see **Ticket Details**.

To create a new ticket

- Click 'Tickets' then select 'New Ticket'

The 'Open New Ticket' page will open:

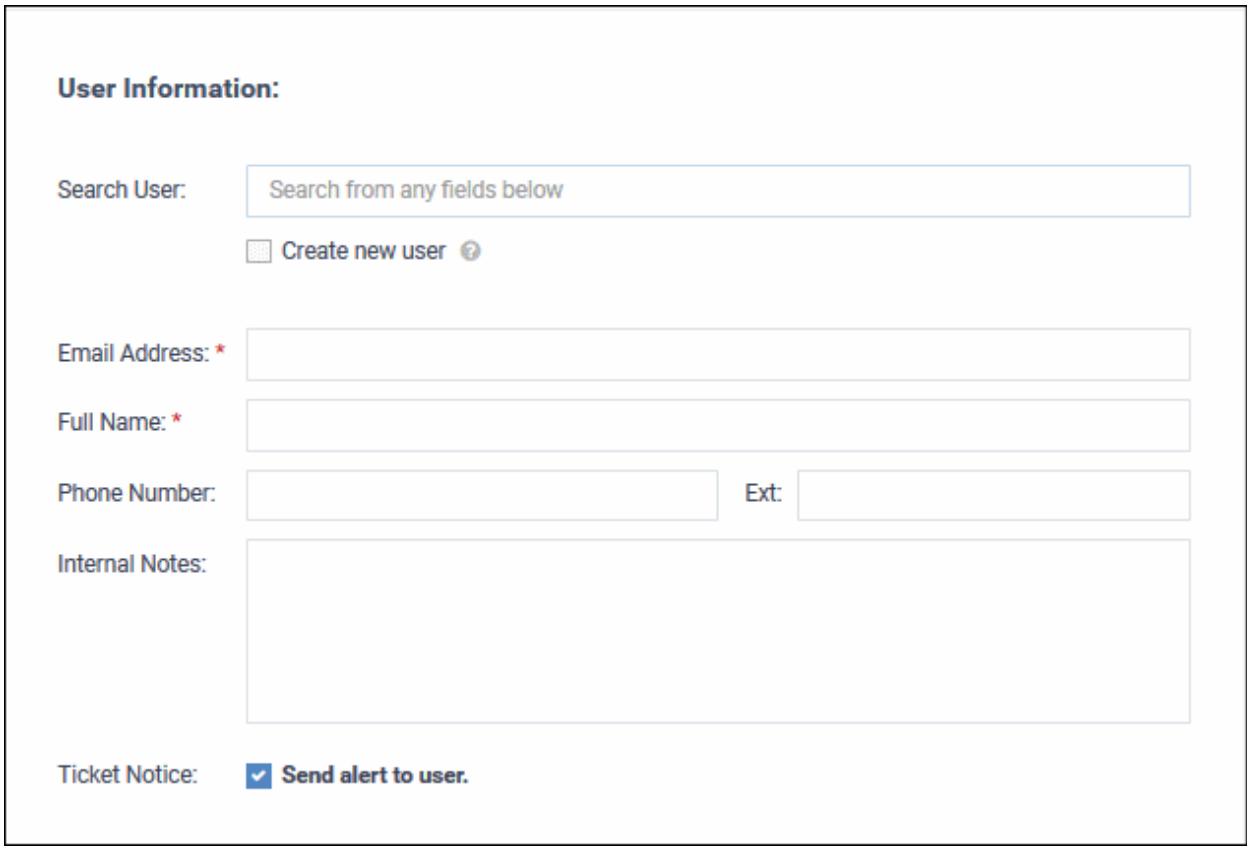


It contains the following sections:

- **User information** - Details of the user on behalf of whom the ticket is created
- **Ticket information and options** - Ticket parameters like category, SLA plan, due date, staff to whom the ticket is to be assigned and more.
- **Backdated ticket** - Specify whether the work was done in the past and the period
- **Ticket details** - Details like issue description, priority, asset type, ticket category and more
- **Response** - Initial response to be sent to the user
- **Internal note** - Notes regarding the issue for internal references

The following sections describe each ticket section in detail:

User Information

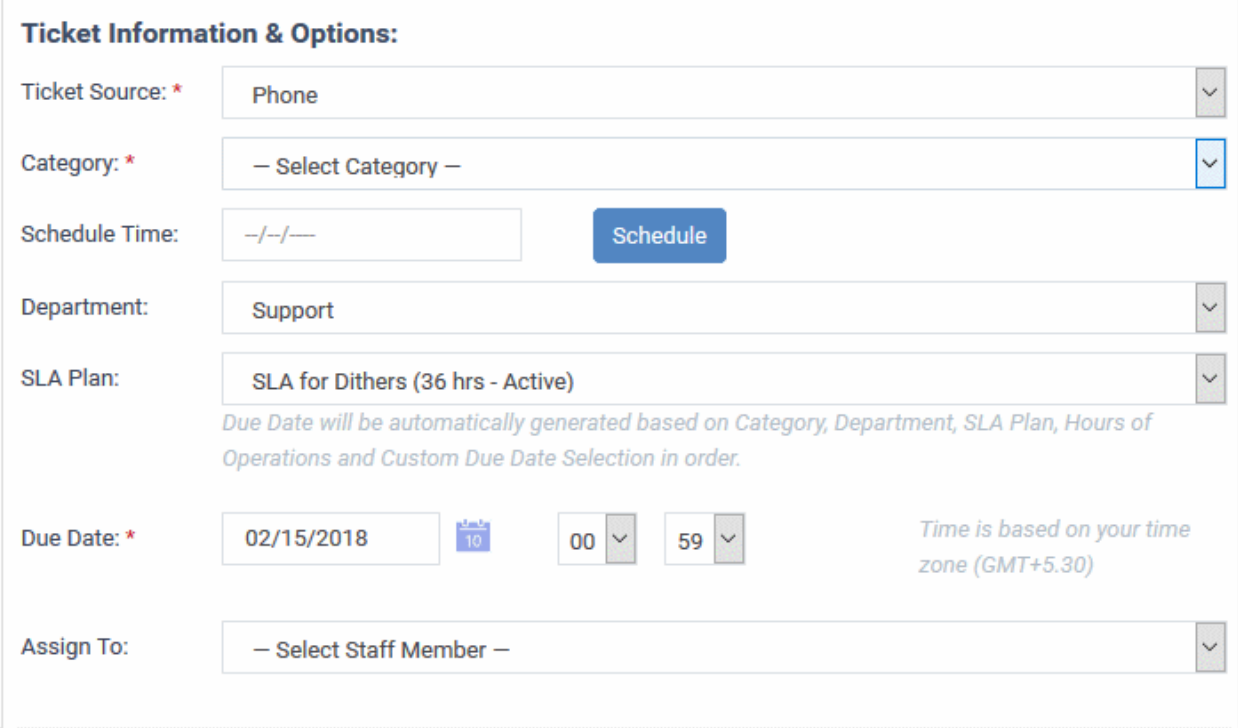


- To create a ticket for an existing user:
  - Start typing the user name or email ID in the search field and choose the user from the suggestions.
  - The details like email address, username, phone number will be auto-populated.
- To create a ticket for a new user, enable 'Create new user'
  - Enter the email address, full name and phone number of the user and notes about the user in the respective fields. The internal notes will be visible only to admins/staff.

Tip: New users will be added as a guests. You can associate new users with a customer in the 'User Directory' interface. See '**Add a user to a company**' in **Manage Users** for more details.

- **Ticket Notice** - Enable to notify the user that the ticket has been created.

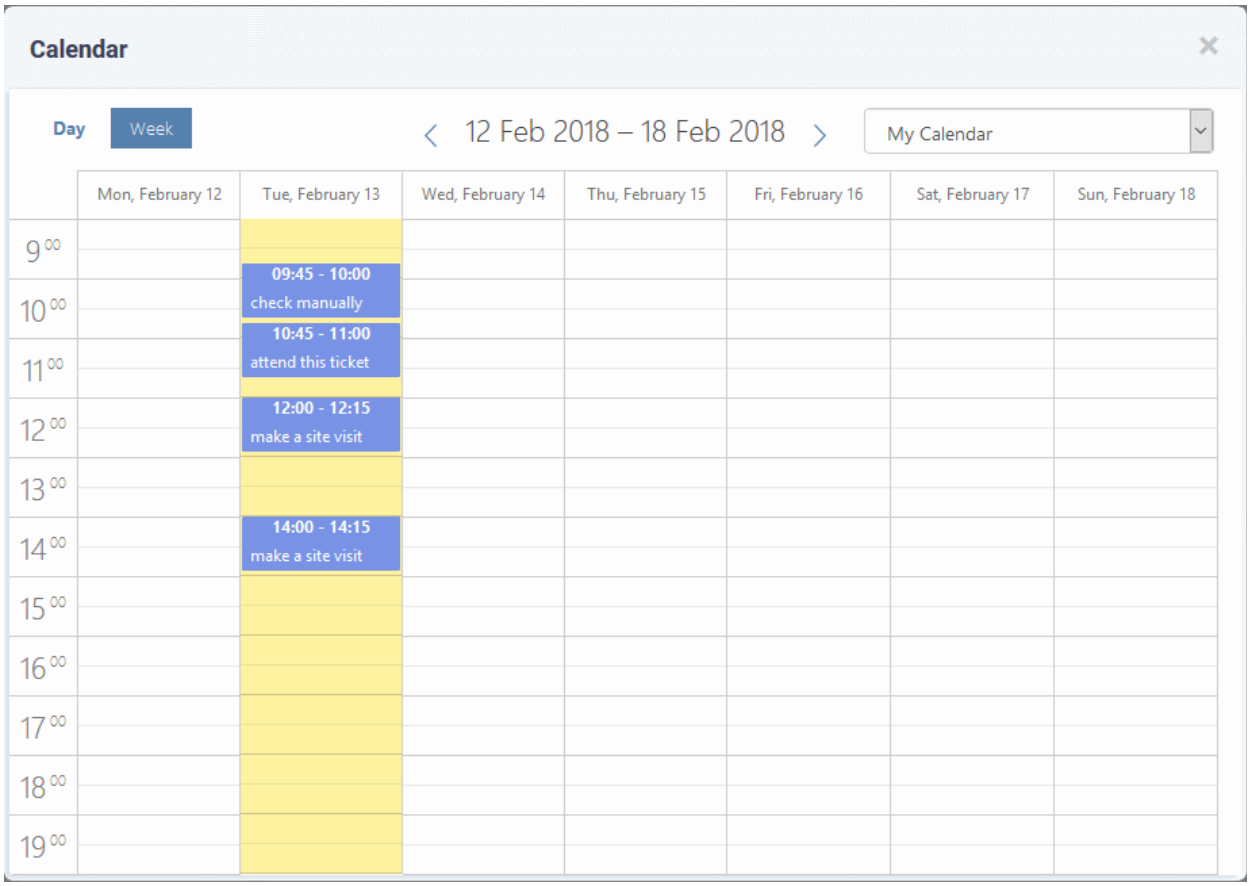
Ticket Information & Options



- **Ticket Source:** Select the source through which you received the request for the ticket. The options are 'Phone', 'Email' and 'Other'.
- **Category:** Select the help topic under which the ticket falls. Depending on the ticket category selected, more forms may be included in the ticket.
- **Schedule Time**: Choose a specific time and date in the future to work on the ticket, if required.
    - It is optional to create a schedule. The schedule will be added to your calendar.

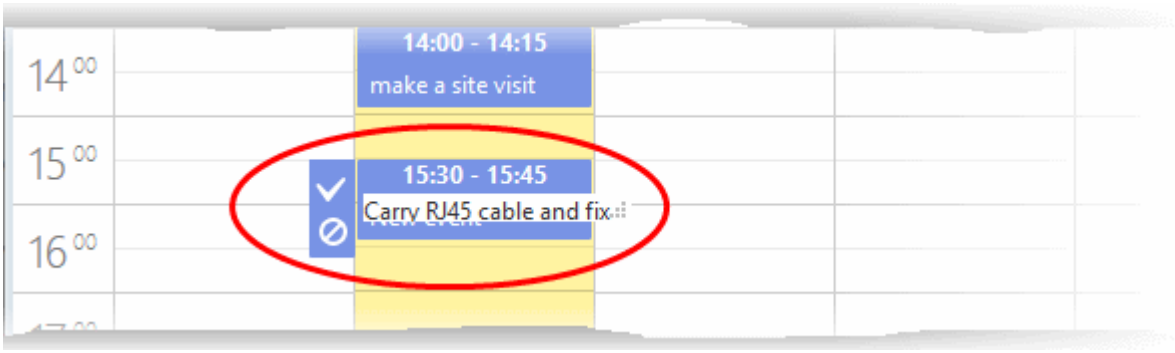
To set a schedule

- Click the 'Schedule' button to open the calendar:

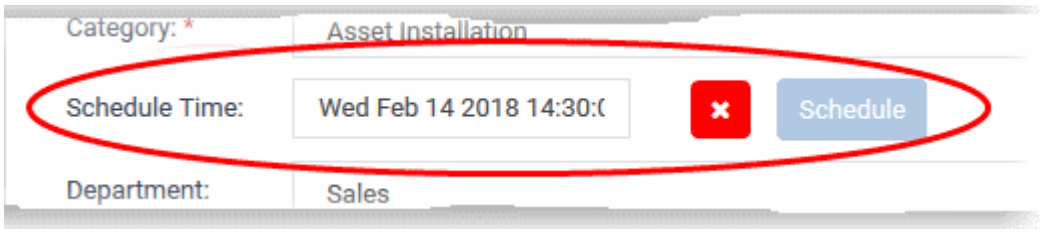


- The current week is shown by default. You can view the current week or day by clicking the respective button above the calendar.
- To move to next week/day, use the '>' buttons on the top

- Double-click on the time slot you wish to reserve for the ticket
- Enter a short description for the task.



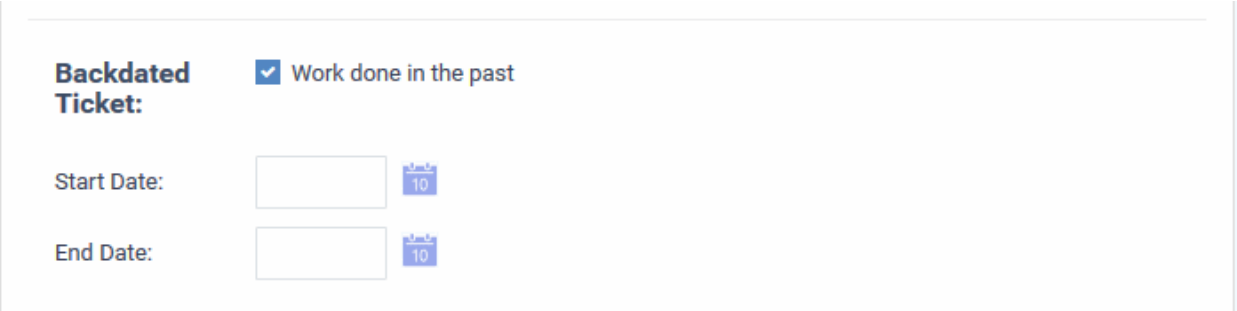
- Click the tick mark ☑ to save the schedule
- The schedule will be added and displayed:



The appointment will be added to the calendar after saving the ticket. You can view your calendar from the 'My Calendar' interface. See **Manage Calendars** for more details.

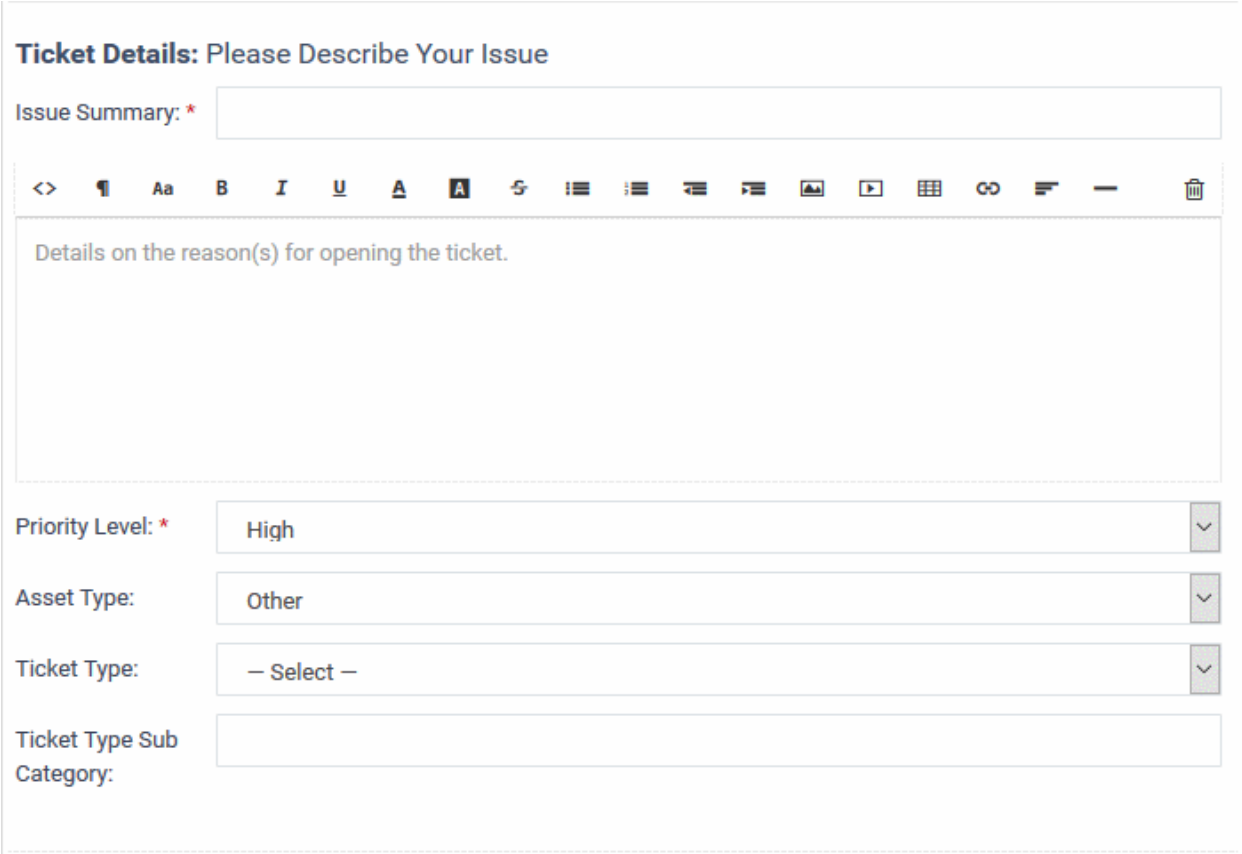
- **Department:** Select the department to which the new ticket should be assigned. The option chosen here will prevail even if the 'Department' for the selected 'Ticket Category' is different. If required, staff can change the department while the ticket is in progress. See **Ticket Details** for more details.
- **SLA Plan:** The service level plan associated with the ticket. Use the drop-down menu to change the plan if required. The option chosen here will prevail even if the SLA plan for the 'Ticket Category' and 'Department' is different. If required, staff can change the SLA while the ticket is in progress. See **Ticket Details** for more details.
- **Due Date:** The date and time by which the ticket should be closed. A default due date will be auto-generated based on the Ticket Category, Department, SLA Plan and other parameters. You can change the date and time as required. This will override the date generated by default.
- **Assign To:** Select the staff member to whom the ticket should be assigned. The option chosen here will prevail even if the 'Agent' for the selected 'Ticket Category' is different.

Backdated Ticket



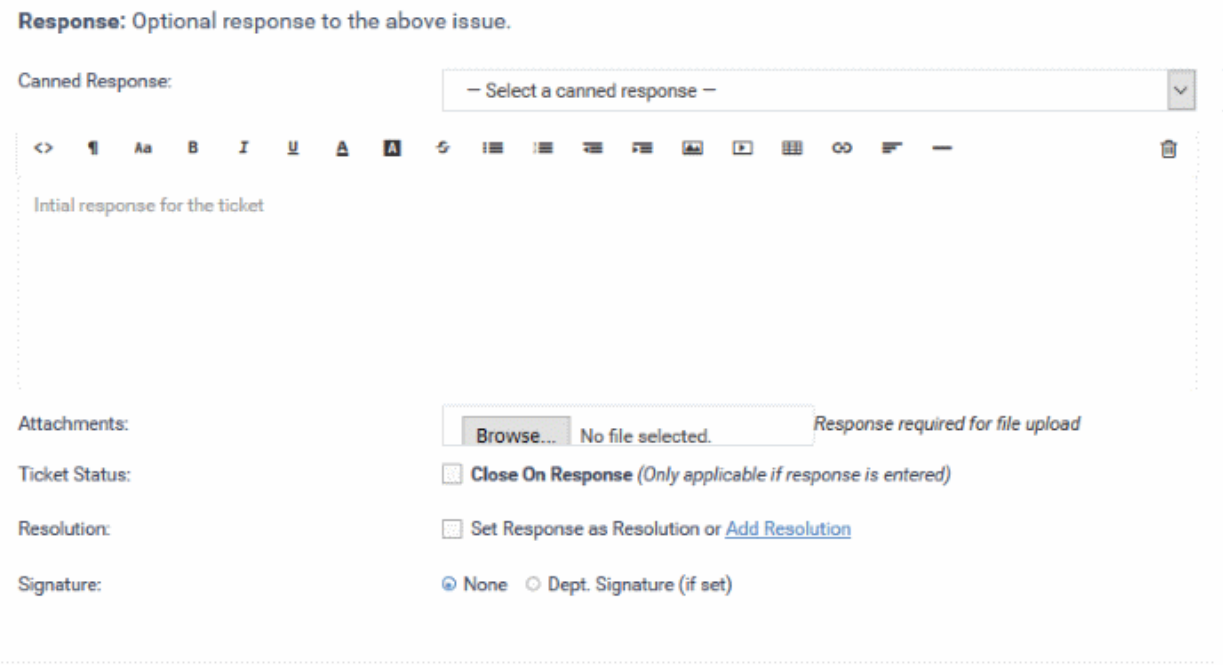
- **Work done in the past** - Select only if you are creating a ticket for a resolved issue that did not have a ticket originally. The ticket will be created with a status of 'Closed'.
  - After selecting this option, enter the start and end dates of the task using the the calendar icons. Make sure that the end date is before the due date entered in the '**Due Date**' field.

Ticket Details



- **Issue Summary:** Enter a brief description of the issue.
- **Issue Details:** Enter a more detailed description of the issue in the text editor. Click the trash can icon above the editor to clear the field.
- **Priority Level:** Ticket criticality.
  - The option chosen here will prevail even if the 'Priority' for the selected 'Ticket Category' is different.
  - Staff can change the priority while the ticket is in-progress. See **Ticket Details** for more details.
- **Asset Type:** The type of item that the ticket concerns. For example, 'Workstation', 'Server', 'Printer', 'Mobile'.
- **Ticket Type:** Select the type of category for the ticket. The options available are 'Alert', 'Order' and 'Problem'.
- **Ticket Sub Category:** Type a specific sub-set if you wish to refine the 'Category' further. Sub-categories can be used to more details about the category. For example, 'Overheating' may be a sub-category of 'Problem'.

Response



- It is optional to create a response. Type any response you wish to send to the user in the text field provided. Responses will be automatically sent to the user after you click 'Open'.
- **Canned Response:** Select if you wish to want to send a pre-defined response to the ticket.
  - Any canned responses you select will be added to the 'Response' text field. You are free to edit and/or add text to complement the canned response.
  - You can add multiple canned responses to build a more complete answer. For example, you might add the following 3 canned responses to a single response - 'Acknowledgment', 'Ticket has been queued', 'Contact details'. Please enter a carriage return between each canned response for formatting reasons.
  - See **Canned Responses** for more details about creating canned responses.
- **Attachments:** Click the 'Browse' button to add relevant attachments to the ticket. To remove the attachment, clear the checkbox next to the file and select 'OK' in the confirmation screen.
- **Ticket Status:** If enabled, the ticket will be closed after creation *if* a response has been sent to the user. See the descriptions above for more about responses.
- **Resolution**: Enabled - The answer/response that staff enter will be treated as the resolution statement.

- OR click 'Add Resolution', if you want to specify a different resolution statement.

- **Signature**: Options are 'None' or 'Dept. Signature'.
  - None - Means you can either send with no signature OR type a custom signature in the editor.
  - 'Dept. Signature' can be created in the Admin Panel ('Admin Panel' > 'Staff' > 'Departments'). See '**Departments**' in the Service Desk admin guide for more details about adding signatures.

Internal Note

- Enter comments, reminders, notes to staff who might work on the ticket and more. The internal note will be visible only to the admins/staff who open the ticket and not to the user.
- Click 'Open' to create the ticket on behalf of a user.
- The ticket will be added to the 'Tickets' interface. You or the staff member to whom the ticket is assigned can view/update the ticket by clicking the subject or ticket number.

The '**Ticket Details**' section covers additional actions you can complete on a ticket. For example, how to create a knowledgebase article out of a ticket.

Sorting and Filtering Options in the 'Tickets' Interface

Sorting items

- Click a column header to sort items in ascending/descending order

The 'Show records' drop-down on the right allows you to select the number of entries to be displayed per page. The options range from 10 records per page up to 100. The default value can be set in the '**My Profile**' interface. You can navigate to different pages by clicking 'Next' and 'Prev'.

Search Options

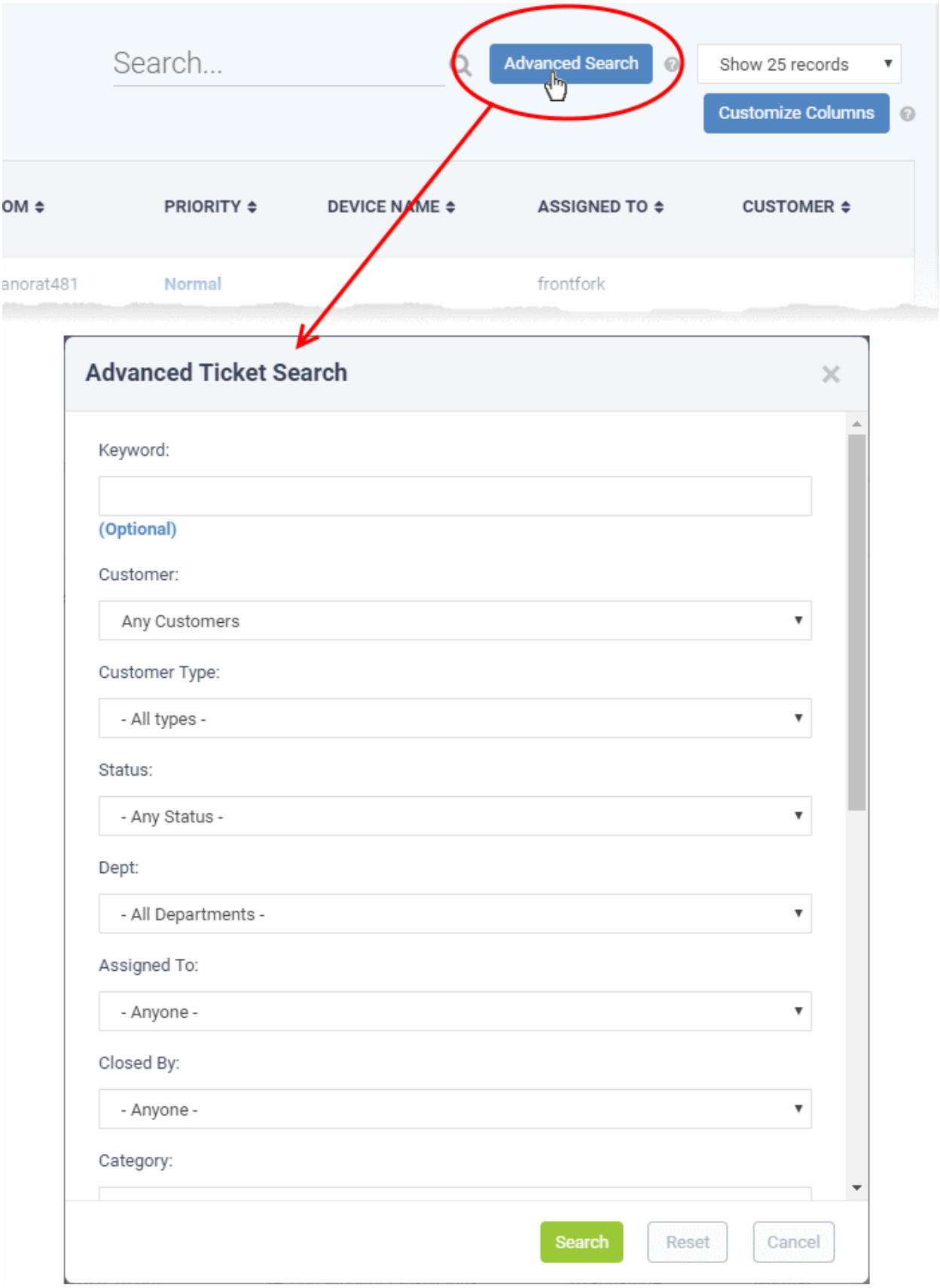
You can run a simple search or an advanced search on tickets.

Simple Search

- The 'Search' field lets you filter tickets by the following criteria:
  - Ticket ID
  - User name
  - Customer
  - Device Name
- Start typing your search term and tickets matching your criteria will be automatically displayed.
- To display all tickets, clear the search field (or simply click the ticket category link on the left).

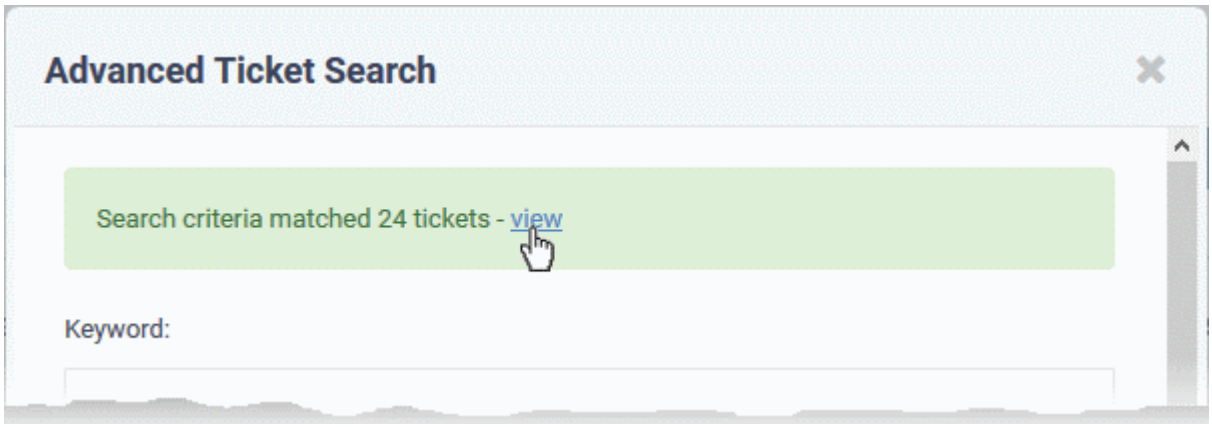
Advanced Search

- 'Advanced Search' lets you filter tickets based on preset criteria
- Click the 'Advanced Search' button



- Enter/select the parameters that you want to use as search criteria.
- Click the 'Reset' button to clear the fields.
- Click the 'Search' button after filling the required search parameters.

The number of tickets that matches the search parameters will be displayed at the top of the screen.



- Click the 'view' link to see the list of tickets which match the search criteria
- To view all tickets again, click the respective ticket category under 'Tickets' on the left

2.3.1 Ticket Details

The ticket details screen lets you review, respond and take actions on a ticket.

- Click 'Tickets' > 'Open' (...or select a different ticket category as required)
- Click on the number of the ticket you want to open

Each ticket contains the following sections. Click the links to jump to the section you need help with:

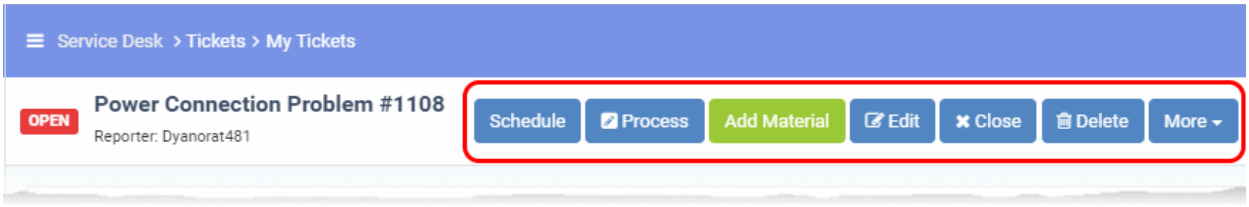
- **Title bar** - Shows basic ticket details and contains controls to manage the ticket. See '**Manage the Ticket**' for more details.
- **Ticket Information** - General details about the ticket.
- **Ticket Workflow**- Appears only for multi-stage tickets. Displays the status of successive stages of the ticket.
- **Ticket Actions** - Take various actions on the ticket - post replies and notes, record time spent, assign the ticket, generate quotes for materials and more.
- **History** - A list of ticket activities.
- **Material Details** - Billable materials and expense items added to the ticket
- **Time Spent** - Time spent working on the ticket by all contributing staff members. This includes time recorded automatically during each service session, and manually added time. The table also shows how much of the time is billable.
- **Staff** - View staff members associated with the ticket. Add new staff who will work on the ticket.

Tickets can be single stage or multi-stage depending on the ticket category to which the ticket belongs.

- **Single stage ticket** - Can be closed by the department/staff member to whom it was assigned. You can configure this in 'Admin Panel' > 'Manage' > 'Ticket Categories'.
- **Multi-stage tickets** - Will be automatically assigned to a specific department or staff member after each stage is closed. Multi-stage tickets are suited to more complex issues which require input from more than one department. See **Ticket Categories** in the online admin guide for more details.

Manage the Ticket

- The control buttons in the title bar let you perform various actions on a ticket:



Click the following links to find out more:

- **Process** - Quick edit feature. Reassign the ticket, update ticket details, change due-date, add collaborators.
- **Remote Control** - Make a remote desktop connection to the device that generated the ticket. Only available for tickets auto-generated by the Endpoint Manager module.
- **Materials** - Add billable items and expenses which were used to resolve the ticket.
- **Schedule** - Create a new ticket schedule or modify the existing schedule.
- **Create a Knowledgebase article** - Use the ticket and responses as the basis of a new support article.
- **Change the ticket owner** - Ticket owner = End user who submitted the ticket, or on whose behalf the ticket was created.
- **Claim a ticket** - Assign the ticket to yourself.
- **Manage forms** - Add forms to a ticket to request more information. Once added, the form can be completed by a staff member in the **ticket edit screen**, or by the user in the web portal.
- **Ban email ID of the user**
- **Print the ticket**
- **Edit the ticket**
- **Close/Reopen a ticket**
- **Delete a ticket**
- **Pause/Resume a ticket**

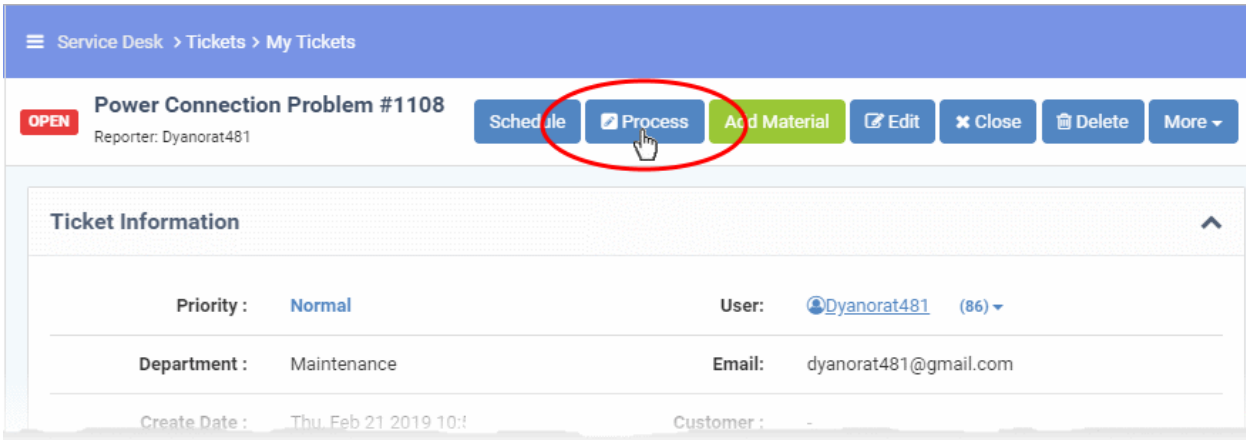
Process the Ticket

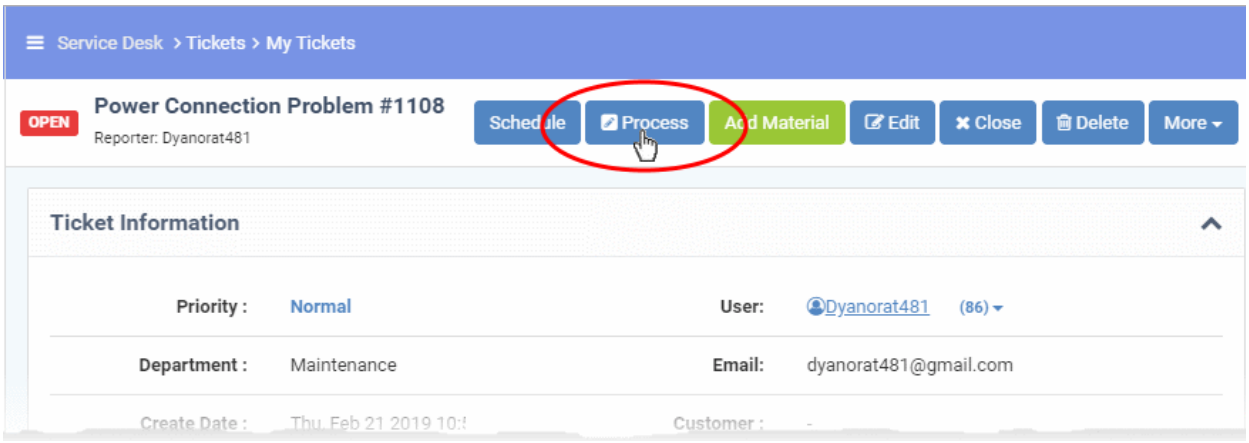
The 'Process' feature lets you quickly reassign a ticket, change ticket details and more.

Tip: You can also process a ticket without opening it. See **Process a Ticket** in **Manage Tickets** for more details.

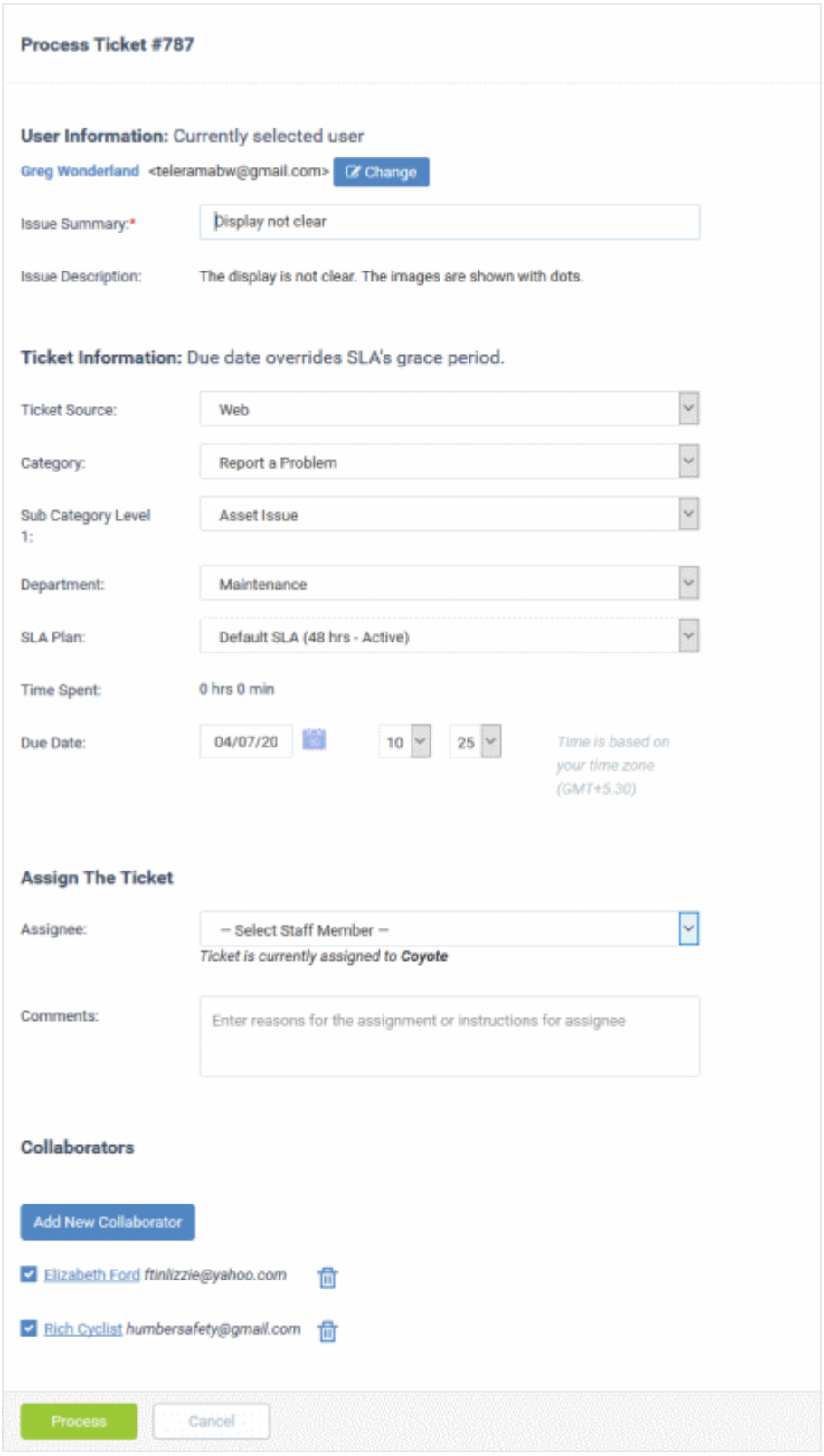
To process a ticket

- Click 'Tickets' then a ticket type ('Open', 'My Tickets', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'Process' button at the top





The 'Process Ticket' pane appears.



User Information

- **User name**: The person who submitted the ticket, or on whose behalf the ticket was created by a staff member. This is pre-populated. Click 'Change' to select a different user.
- **Issue Summary:** Brief description of the issue. Update if required.
- **Issue Description:** Ticket description provided by the creator of the ticket. This is not editable.

Ticket Information

- **Ticket Source:** The channel through which the ticket was created. The possible values are 'Phone', 'Email', 'Web', 'API' and 'Other'. This is pre-populated and can be updated if required
- **Category:** The help topic under which this ticket falls. This is pre-populated and can be updated if required. See the online help page for '**Ticket Categories**' in the admin guide for more details.
- **Sub Category** - Specific issue type as chosen by the person who created the ticket. For example, 'Overheating' may be a sub-category of 'Problem'.
- **Department:** The department to which to the ticket is currently assigned. This is pre-populated and can be updated if required. Departments are created and managed by the admins through the Admin panel. See the online help page for '**Departments**' in the admin guide for more details.
- **SLA Plan:** The service level plan associated with the ticket. Use the drop-down menu to change the plan if required. The option chosen here will prevail even if the SLA plan for the 'Ticket Category' and 'Department' is different.
- **Time Spent** - Cumulative time spent on the ticket by all contributing staff members. This total includes time recorded automatically during service sessions and time manually added by administrators/staff.
- **Due Date:** The date and time by which the ticket should be closed. Change the date and time if required. This will override the date generated by default.
- **Resolution**: A description of the fix/solution. Alternatively, this may contain a description of the steps taken so far, and those that remain, in order to bring about a fix. This is set by the staff member attending to the ticket. Change the resolution if required.

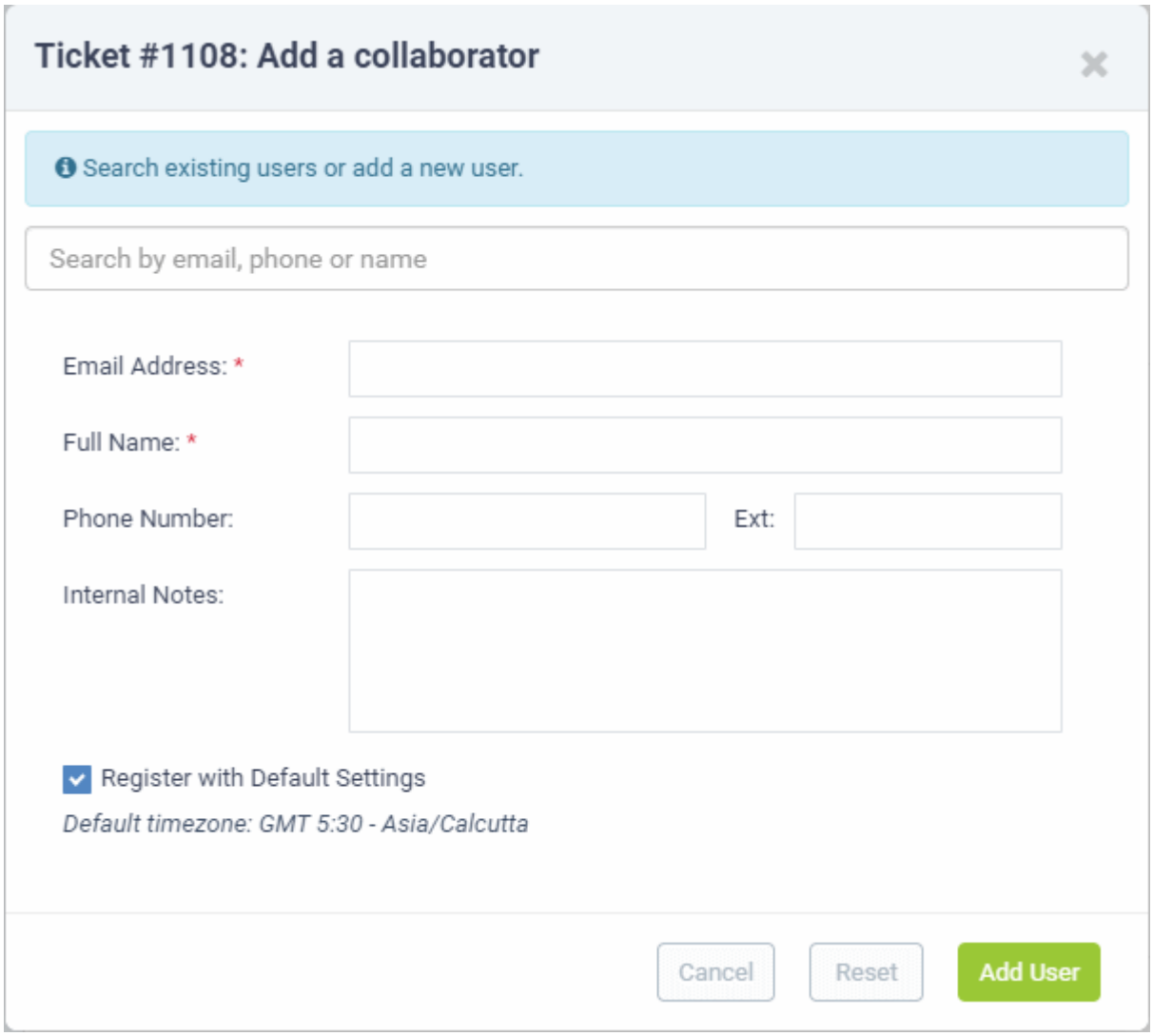
Assign the Ticket

- **Assignee:** Person who is currently responsible for the ticket. You can change the assigned staff member if required.
- **Comments:** Enter instructions for the assignee or reasons for the assignment.

Collaborators

A collaborator is a person, other than the assigned staff-member, who also works on a ticket. Collaborators will receive notifications when the ticket is updated.

- Click 'Add New Collaborator' to associate new or existing users with the ticket.



To add an existing user or staff member:

- Type the first few letters of their username/email address in the 'Search' box and select the user from the options

To add a new user:

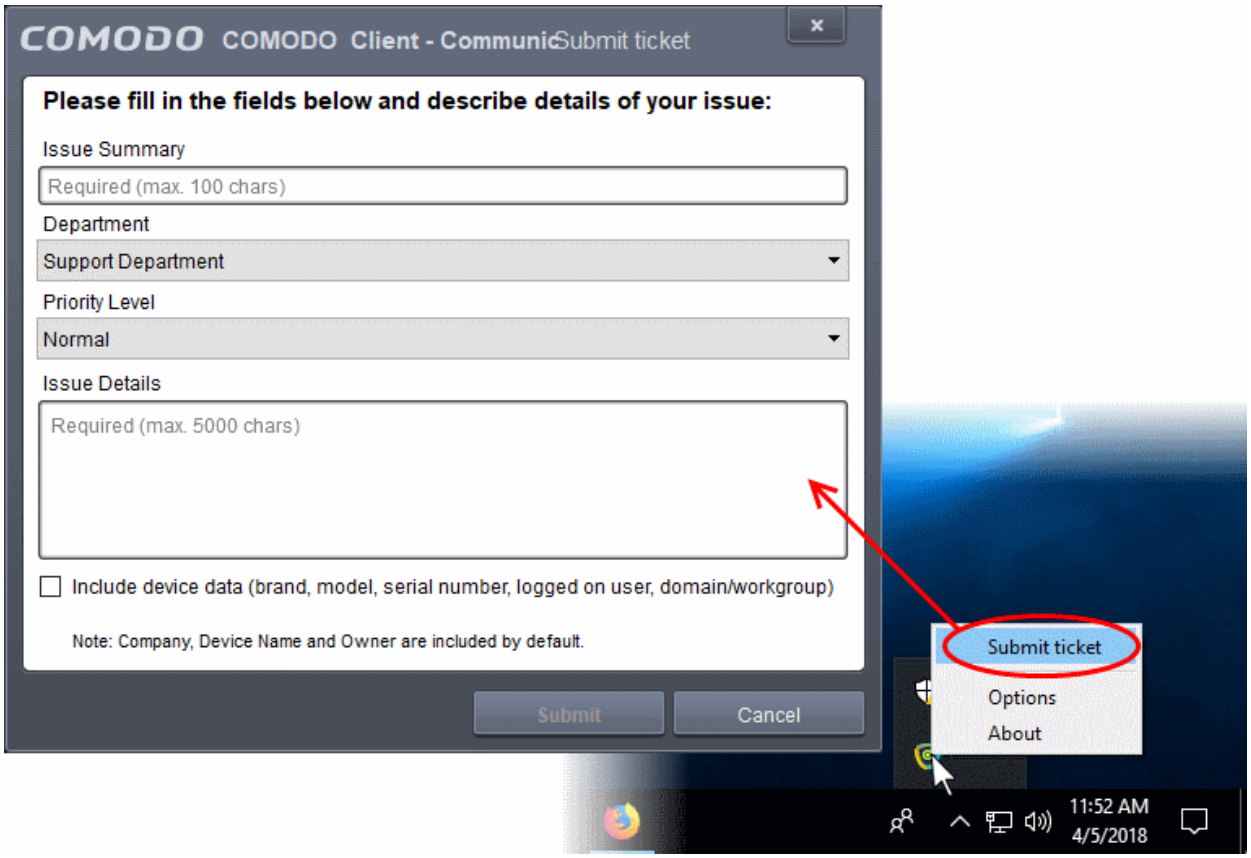
- Enter their full name, email address and other details
- Click 'Add User'
- Repeat the processes above to add more collaborators

- Click the 'Process' button after you have made your changes. The ticket will be updated per the new details.

Take Remote Control of Windows Endpoint

Remote control allows you to make a remote desktop connection to the Windows or MAC device which generated a ticket. This helps staff solve issues, install third party software, or run system maintenance.

- 'Remote Control' is available only for tickets generated by Endpoint Manager (EM).
- There are two ways in which EM can add tickets to Service Desk:
  - **Automatic** - EM can monitor endpoints and generate a ticket if certain conditions are met. For example, generate a ticket if RAM usage exceeds 90%.
  - **Manual** - Endpoint users can right-click on the EM tray icon and submit a ticket:



- Admins and staff need to install 'Remote Control by ITarian' on their local computers (the computer they use to log into Service Desk).
  - You will be offered the opportunity to install this software when you attempt to takeover an endpoint for the first time.
- Once installed, you can take control of the endpoint from the ticket.
- The viewer also supports clip-board sharing so you can copy files between your computer and the endpoint.
- You can also use key combinations such as 'Ctrl+Alt+Del', 'Alt+F4', 'Ctrl+C' on the remote machine (Windows devices only).
- If the managed endpoint has a multi-monitor setup, you can view individual monitors or all monitors at once.

See the following sections for more help:

- **Download and install the Remote Control application**
- **Use the Desktop Application for Remote Control**

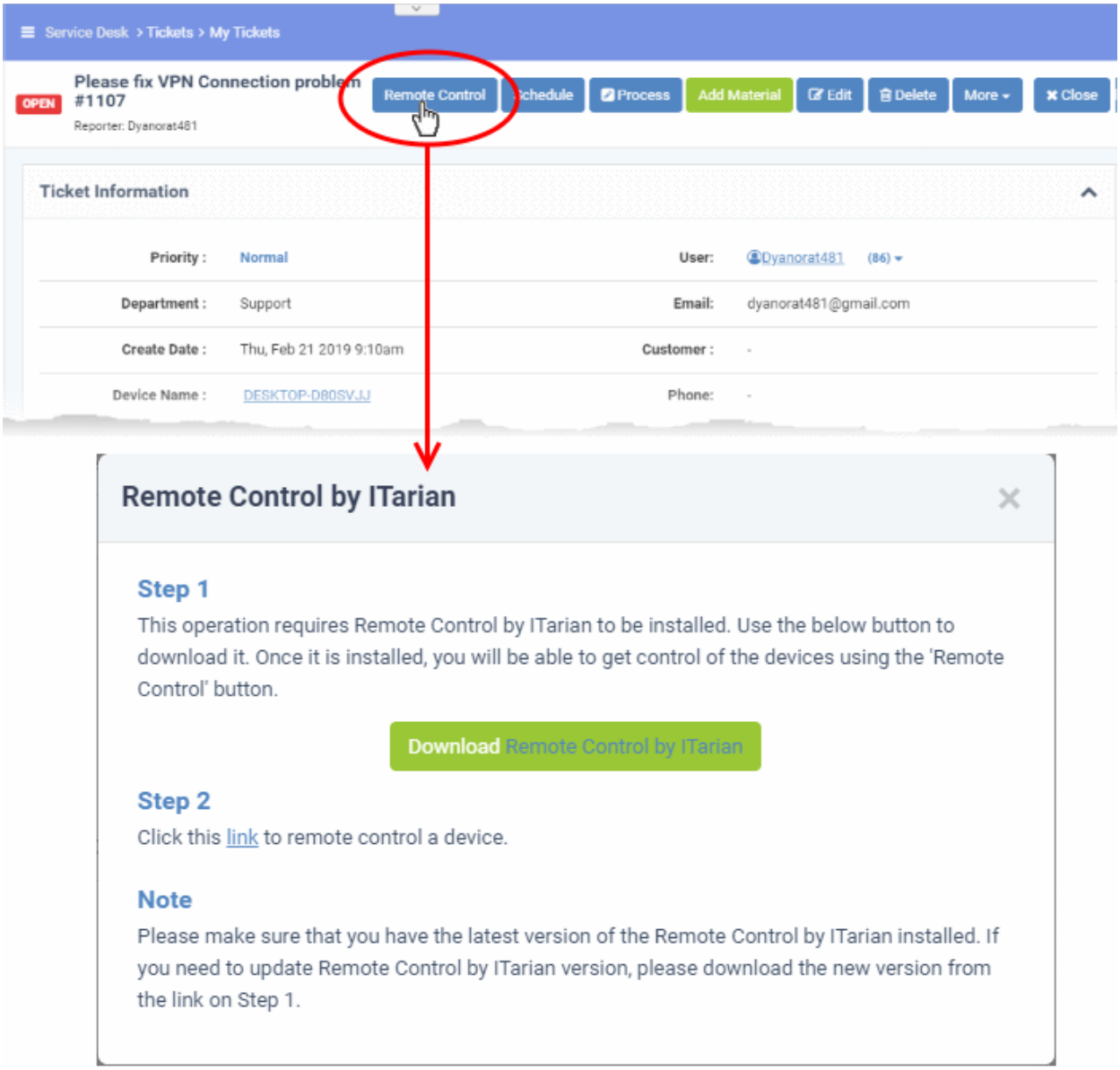
Download and install the Remote Control application

- **Download from Service Desk**
- **Download from the Comodo One console**

Download RC from Service Desk

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'My Tickets', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'Remote Control' button

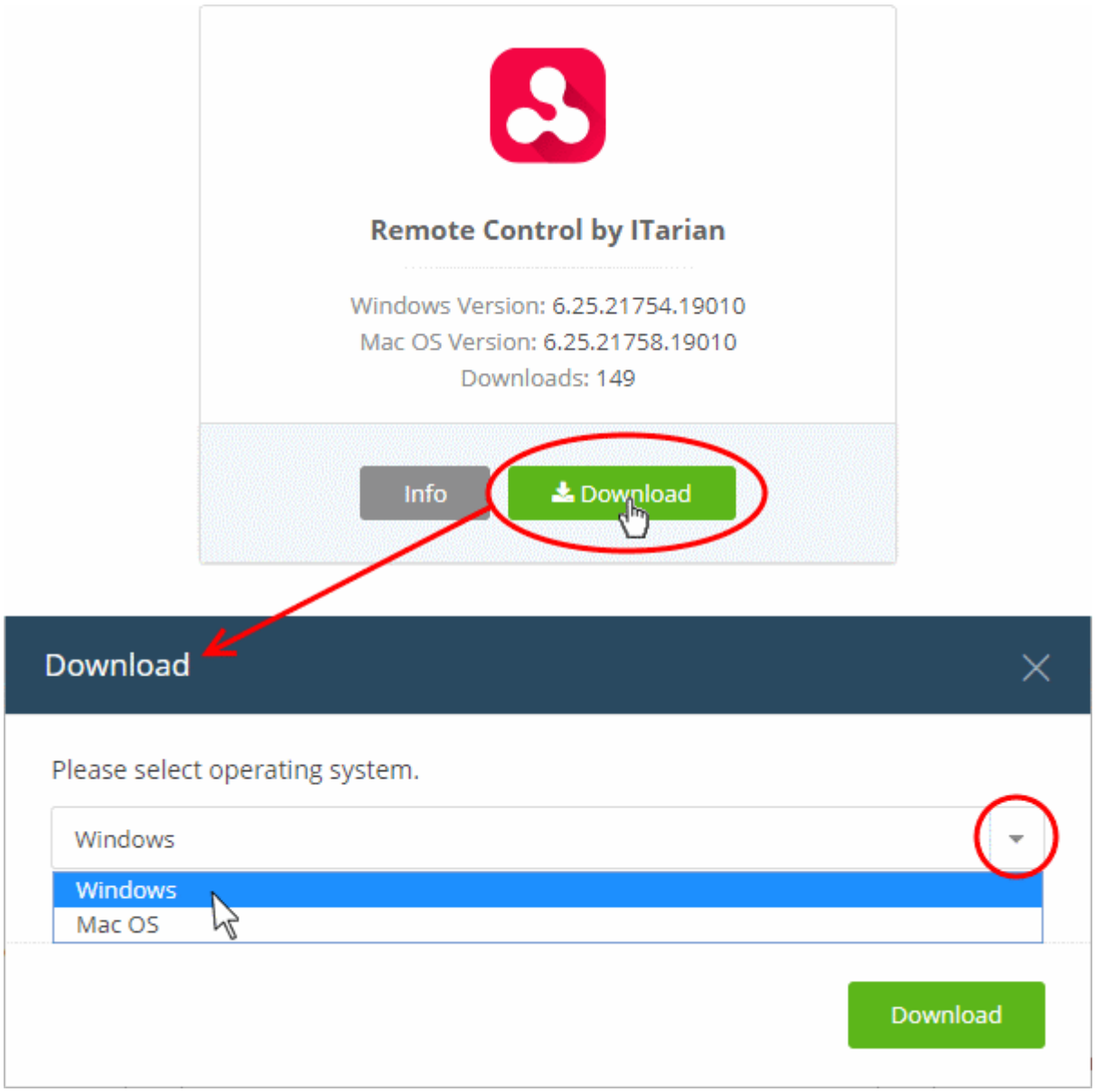
Reminder: The 'Remote Control' button is available only for tickets generated by Endpoint Manager.



- Click 'Download Remote Control by ITarian' under 'Step 1'

Download RC from Comodo One Console

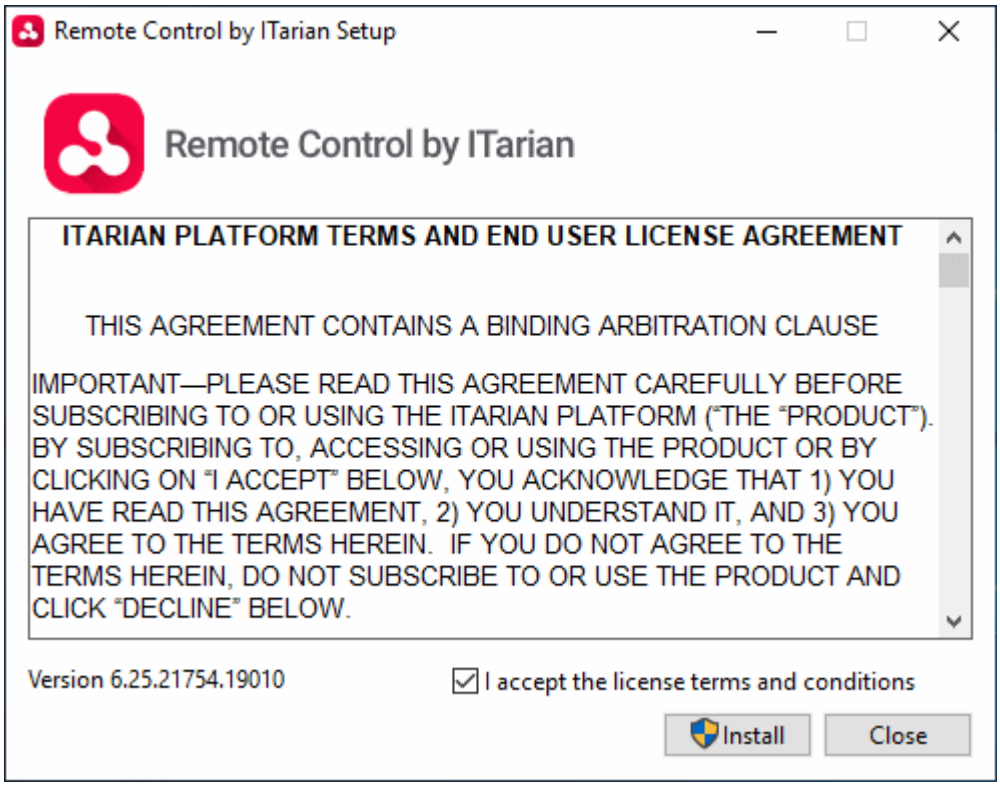
- Login to your Comodo One account and click 'Tools' at the top
- The 'Tools' interface displays a list of productivity and security tools available for download from C1 as tiles
- Click the 'Download' button in the 'Remote Control by ITarian' tile:



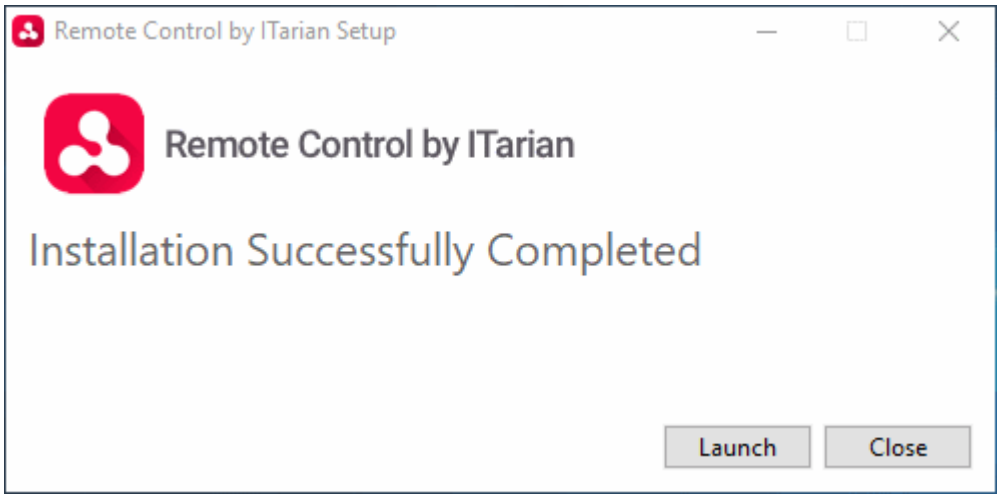
- Select the operating system of your admin machine, click 'Download' and save the setup file.

Install the application

- Launch the set up file to start the installation wizard:



- You must read and accept the end user license agreement before continuing. After doing so, click 'Install' to start the installation.



- After installation is complete, click 'Launch' to start the application.

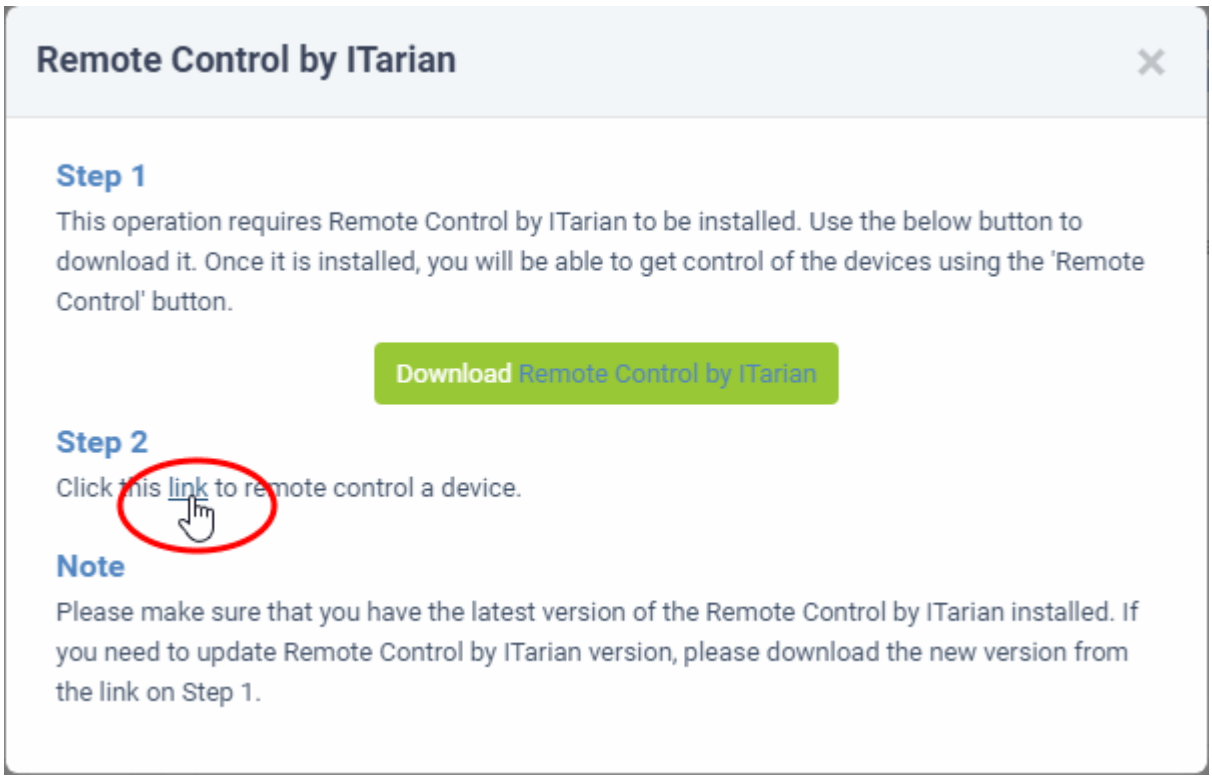
Use the Desktop Application for Remote Control

- Once RC is installed, you can take remote control of a Windows endpoint from the 'Ticket Details' interface.

Take remote control of a Windows device

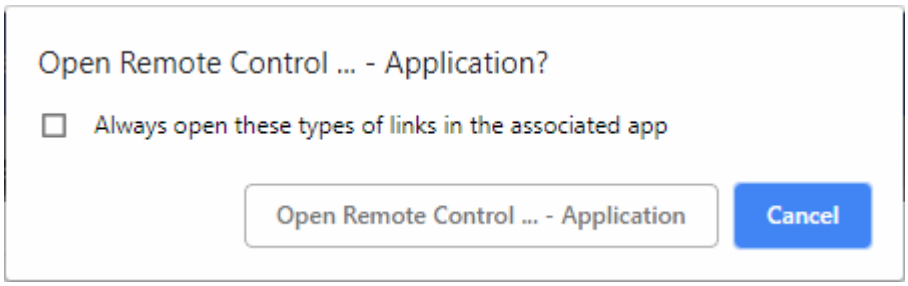
- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'My Tickets', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'Remote Control' button

Reminder: The 'Remote Control' button is available only for tickets generated by Endpoint Manager.



- Click 'link' under step 2:

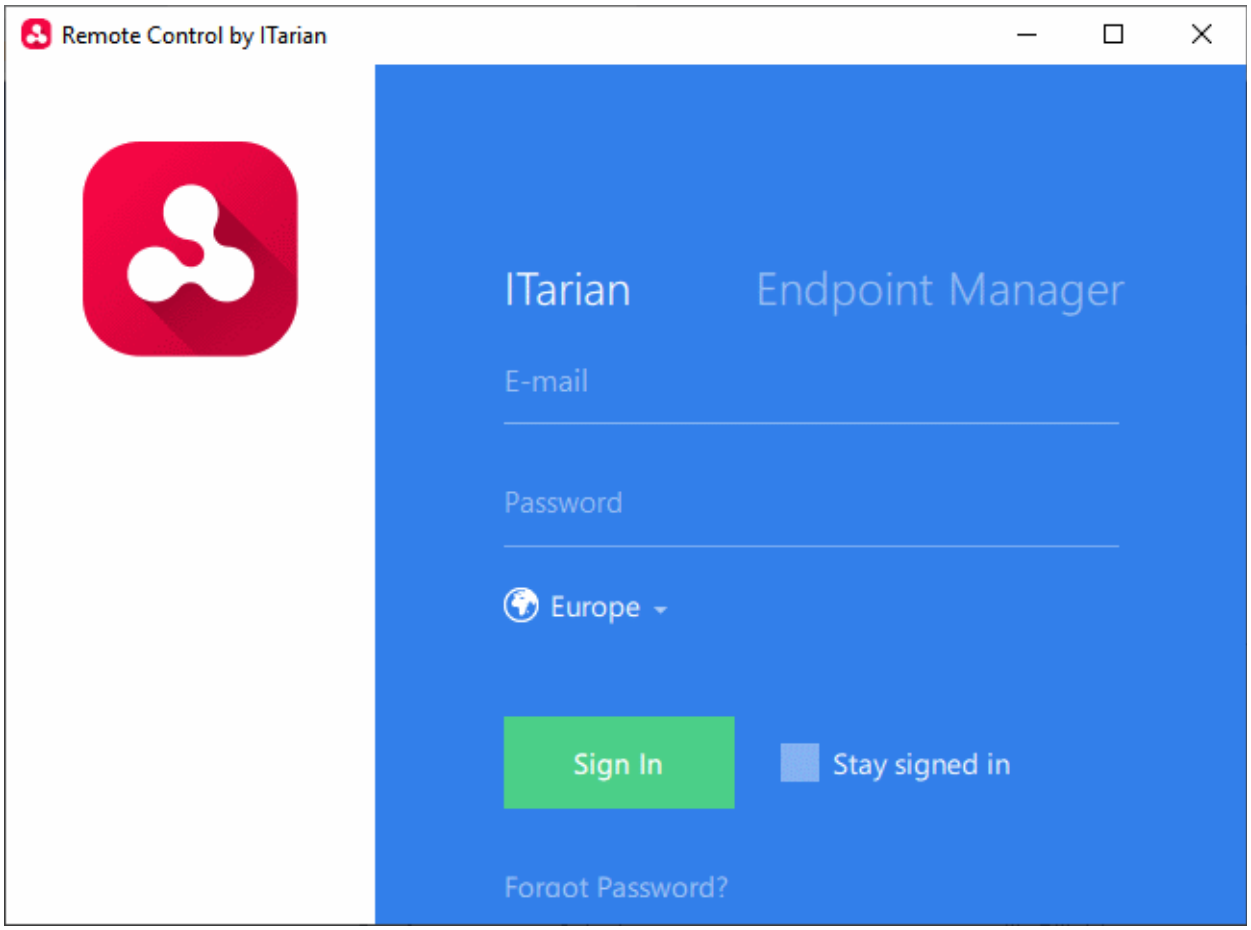
Next, you need to select the application to open the link.



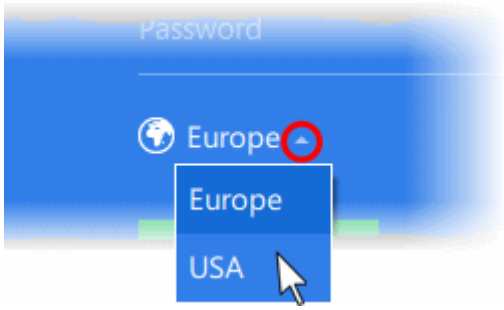
- Click 'Open Remote Control by ITarian'.

Note : If a newer version of the application is available, please download it to continue.

The RC application starts:

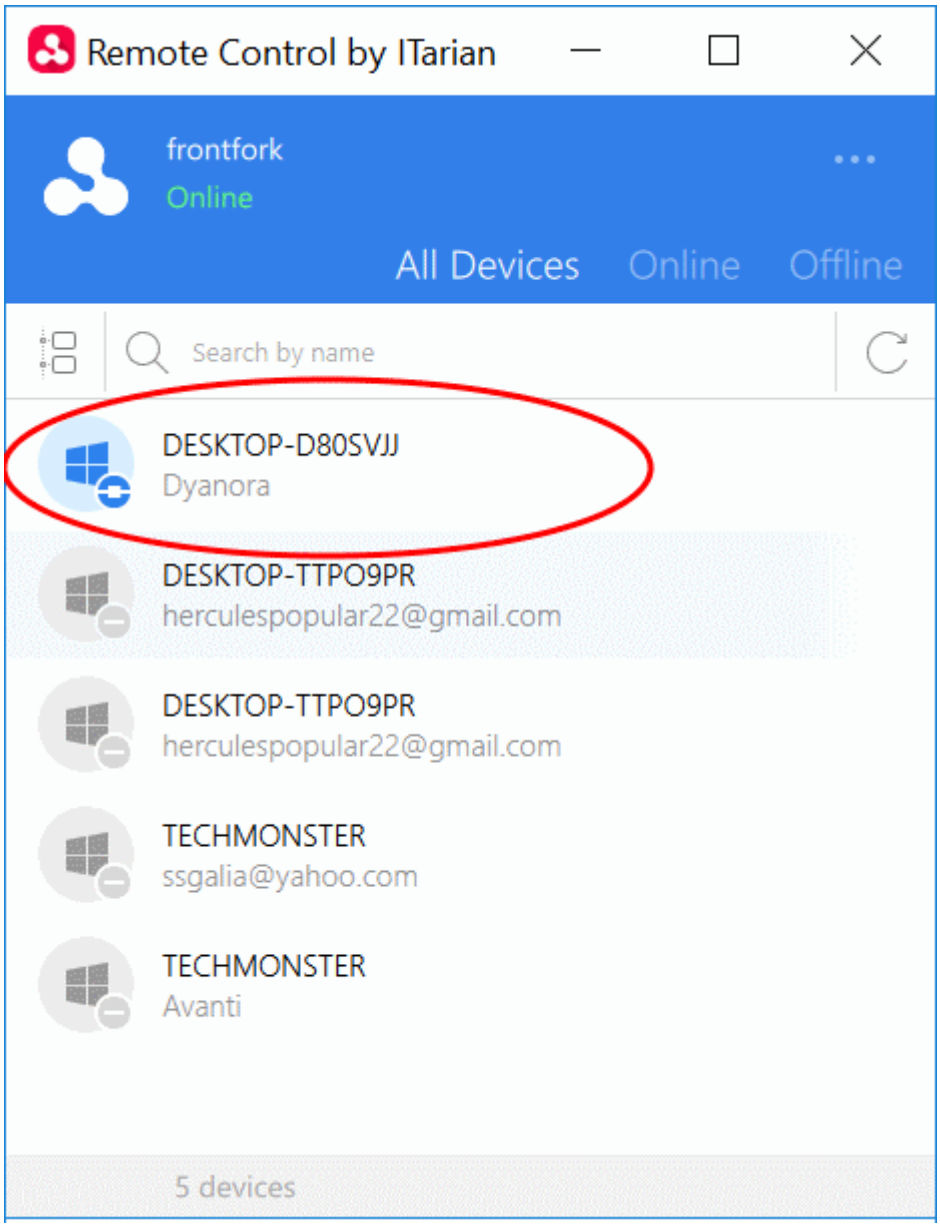


- Click the 'ITarian' tab then enter your C1 username and password
- The region selector allows you to choose the C1 hosted service closest to your location. Select the location nearest to you for the best performance / fastest connection.



- **Stay Signed in** - The app will not log you out when you close the application. You will not need to provide your password to use the app in future. You will instead directly connect to the endpoint after clicking the link in the **Remote Control** dialog.
- Click 'Sign In'.

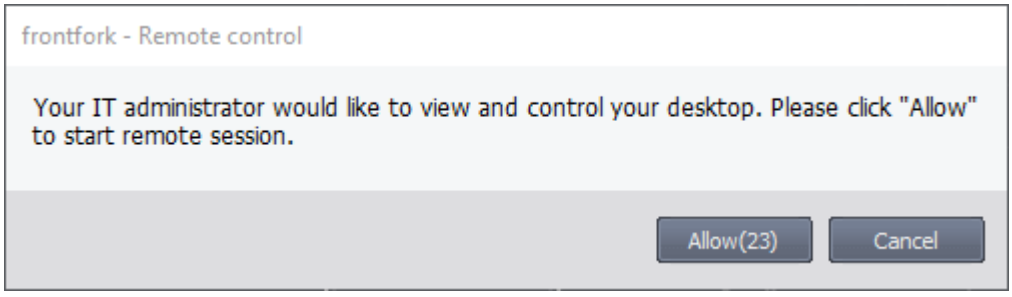
The application opens with a list of devices added to Endpoint Manager. The endpoint associated with the ticket is pre-selected for remote desktop connection:



Tip: Alternatively, you can launch the RC application from your desktop and select the target endpoint

- Double click the desktop shortcut or the system tray icon
- Login with your C1 username and password
- Select the device you want to manage

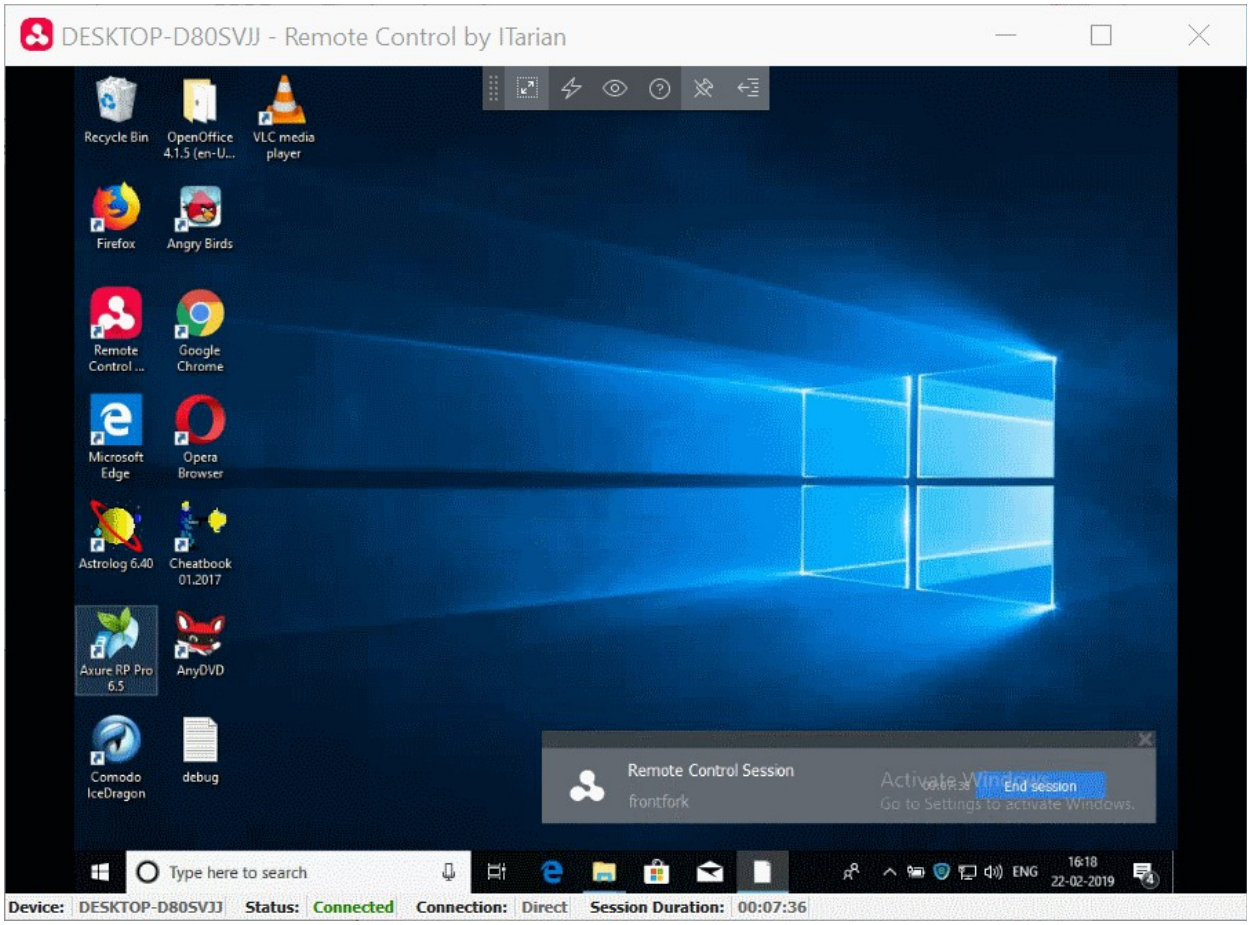
A request message is shown on the end-user desktop:



- The connection is established once the user clicks 'Allow', or if the does not respond within 30 seconds.
- The following notification appears once the session is active:

- The user can terminate the connection by clicking the 'End session' button.

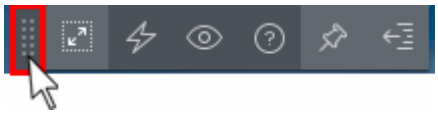
The 'Remote Control' interface shows the desktop of the remote computer:



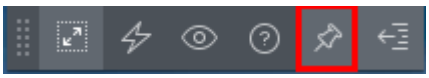
- You can now interact with the target device to perform tasks as required.
- The client interface contains the following menus and settings:

Full Screen - The remote desktop will cover your entire display, without the operating system's window-framing interface.

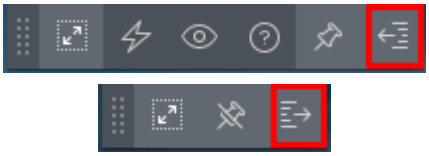
- Click the same icon to exit full screen mode



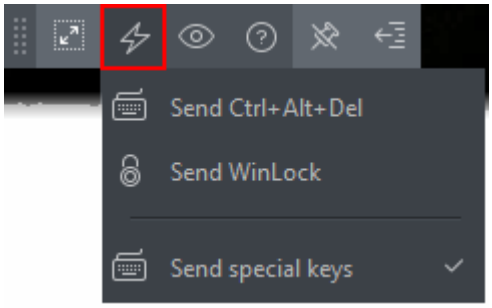
Position - Click and drag the tool bar to your preferred location.



Pin - Pin or unpin the tool bar to the title bar in full screen view.

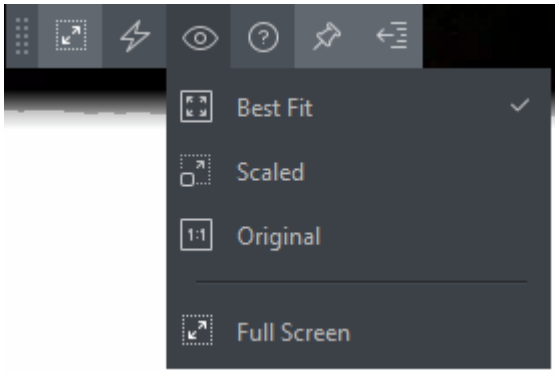


Minimize/Maximize - Show/hide tool bar options.



Actions - (Applies to Windows devices only) Send control commands to the endpoint.

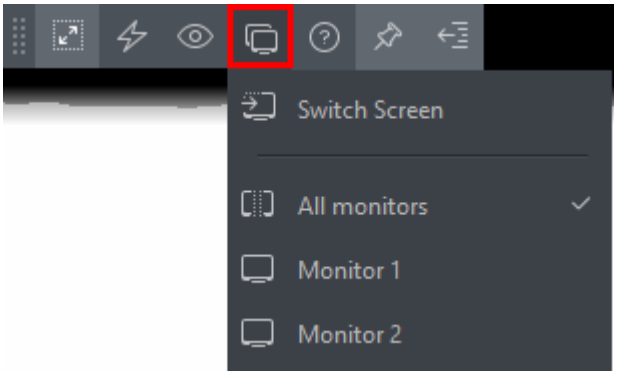
- **Send Ctrl + Alt + Del** - Opens the Windows security screen. This allows you to lock the computer, log the current user out of the remote machine, change passwords, view the local task manager or shut down/restart/hibernate the machine.
- **Send WinLock** - Locks the managed endpoint. A password will be required to unlock the endpoint.
- **Send special Keys** - If enabled, allows you to send key combination commands such as Ctrl+C, Windows + R and so on.



View - Change the display size of the remote desktop. The available options are:

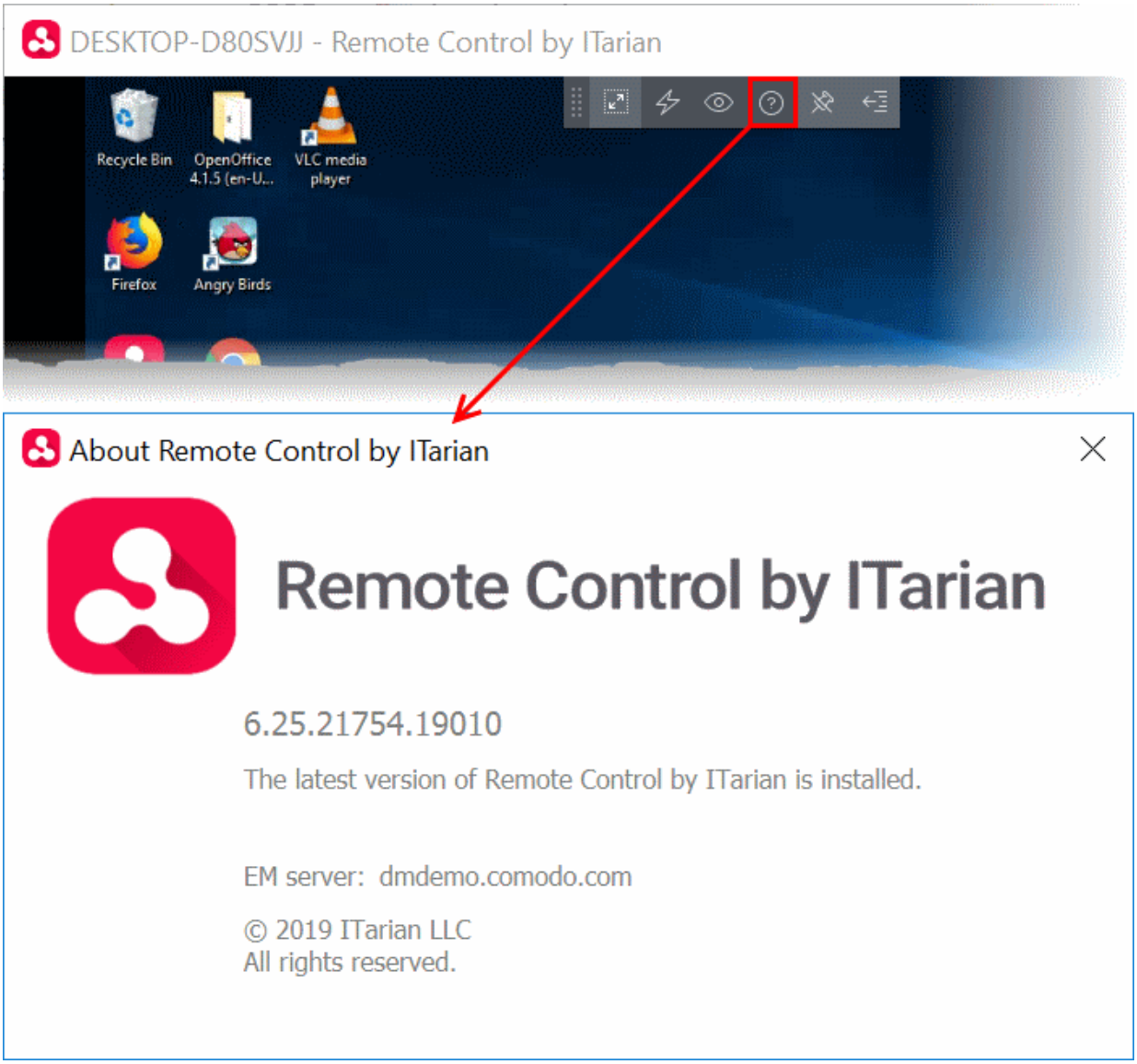
- **Best Fit** - Automatically adjusts the screen resolution for the best visual experience.
- **Scaled** - Displays the target desktop with the resolution of the admin computer
- **Original** - Displays the target desktop at its own resolution
- **Full screen** - Displays the remote desktop in full screen view

Multi-Screen - The multi-screen icon only appears if the target point endpoint has a multi-monitor setup. The drop-down shows all monitors connected to the endpoint and allows you to choose which to view.



- Select 'Switch Screen' to move to the next screen on the list
- Select 'All Monitors' to view all connected screens simultaneously
- Select an individual monitor to view it in stand-alone mode

Help - Shows the 'About Remote Control by ITarian' dialog which shows version number and copyright information.



Add Materials to the ticket

Staff can add consumables, expenses and services to a ticket, and set the billable cost of these items.

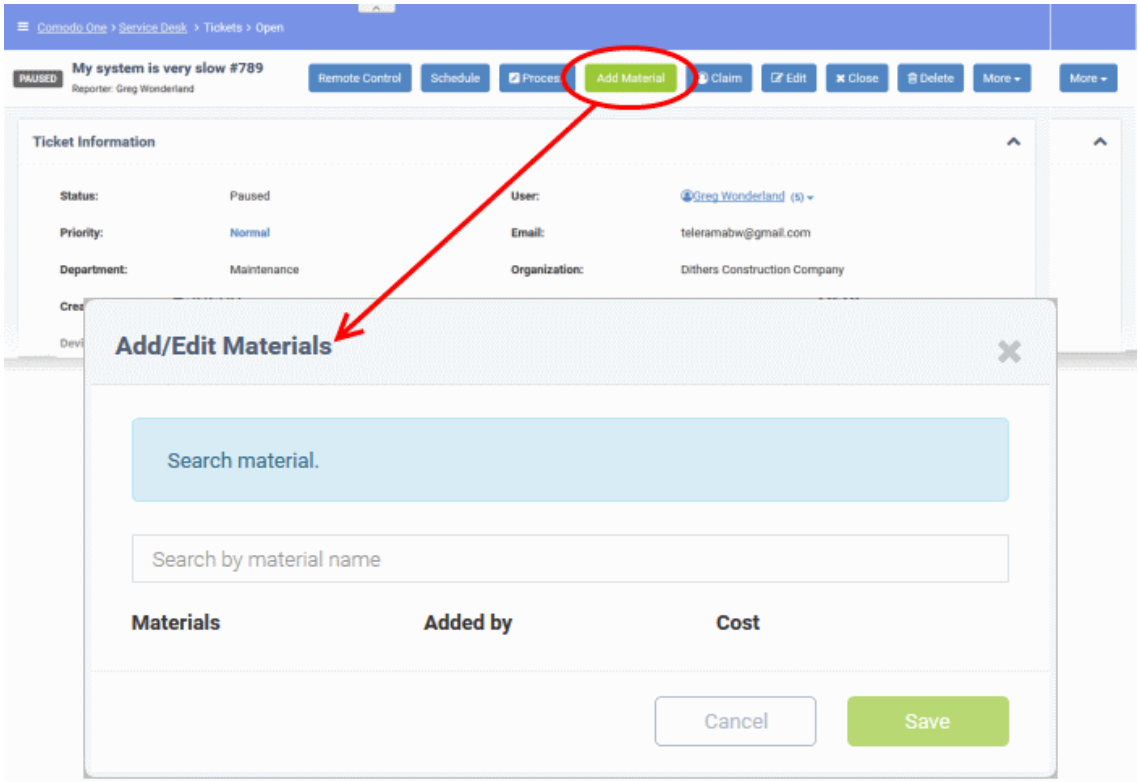
- Materials and expenses added to a ticket need to be approved by an administrator. Only then will they be charged to the customer.
- The 'Material Details' pane in the 'Ticket Details' interface shows all existing materials on the ticket.

Tip:

- Admins can create a inventory of materials in 'Admin Panel' > 'Manage' > 'Materials'.
- Materials you add to the inventory will be available for staff to add to a ticket.
- See **Manage Materials and Expense Types** if you need help with this.

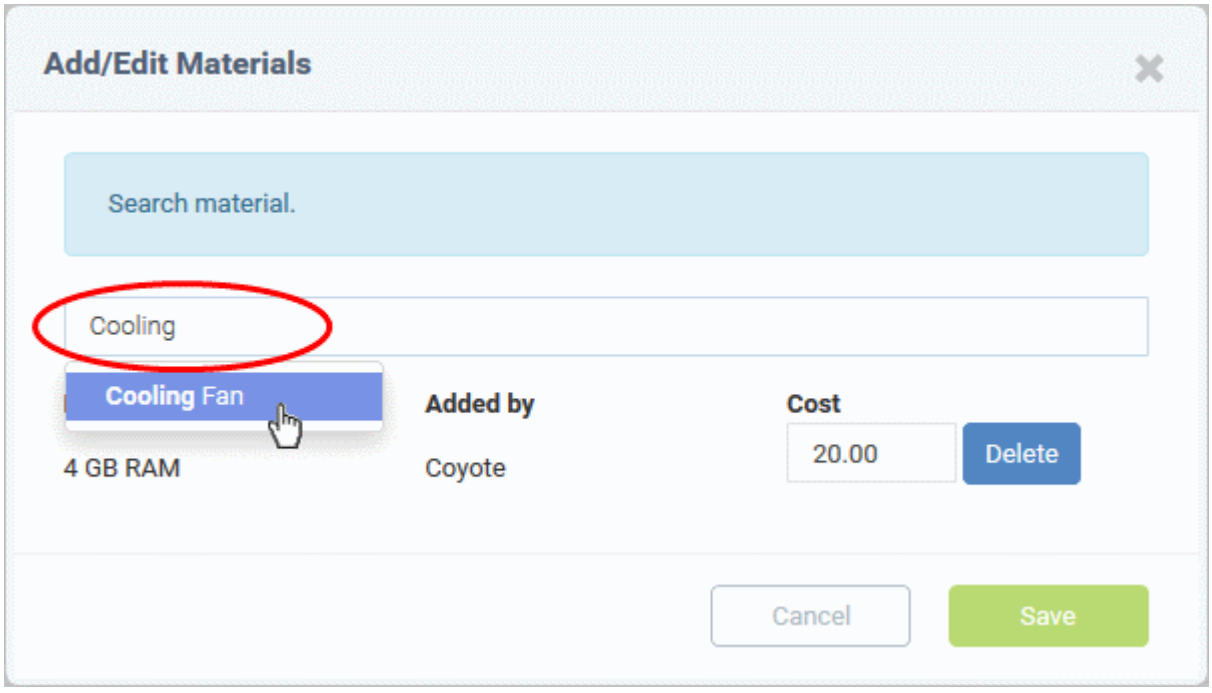
Add materials to a ticket

- Click 'Staff Panel' > 'Tickets'
- Open the ticket to which you want to add materials
- Click the 'Add Material' button at the top of the details interface:



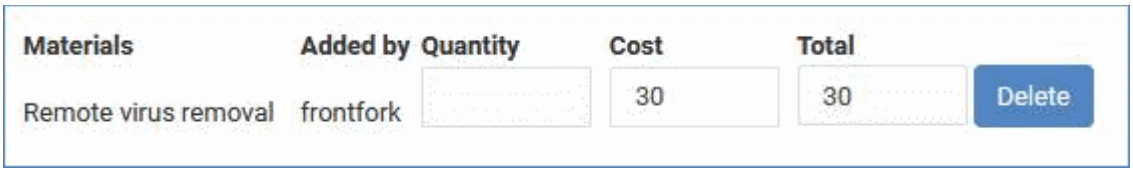
The add dialog lets you add new materials and lists any materials that are already on the ticket.

- Start typing the name of the new material in the search box.
  - Ask your administrator if you don't know the name of the material. They are listed in 'Admin Panel' > 'Manage' > 'Materials'.
- Select the material from the options that appear in the drop-down:



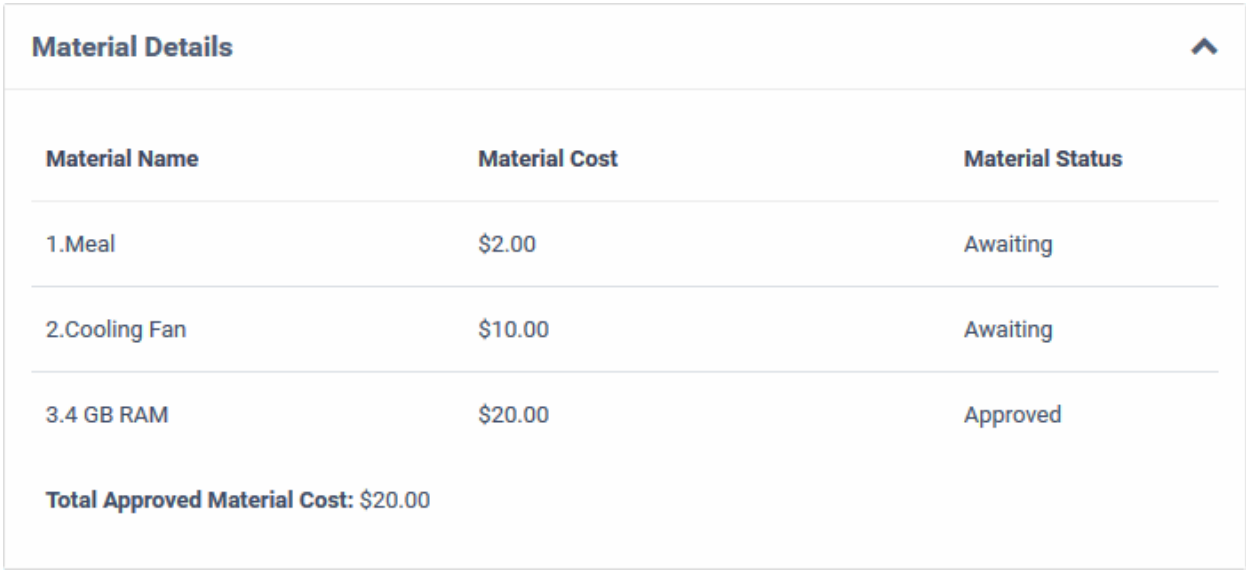
- Enter the quantity and price-per-unit in the respective fields. The total cost will be calculated for you:

'Service' type materials only allow you to specify the price. You should add another instance of the material if you want to increase the quantity:



Prices are charged in your account's default currency.

- Repeat the process to add more items
- Click 'Save' to add the items to the ticket
- Staff can view all materials on a ticket by expanding the 'Material Details' pane in the 'Ticket Details' screen:



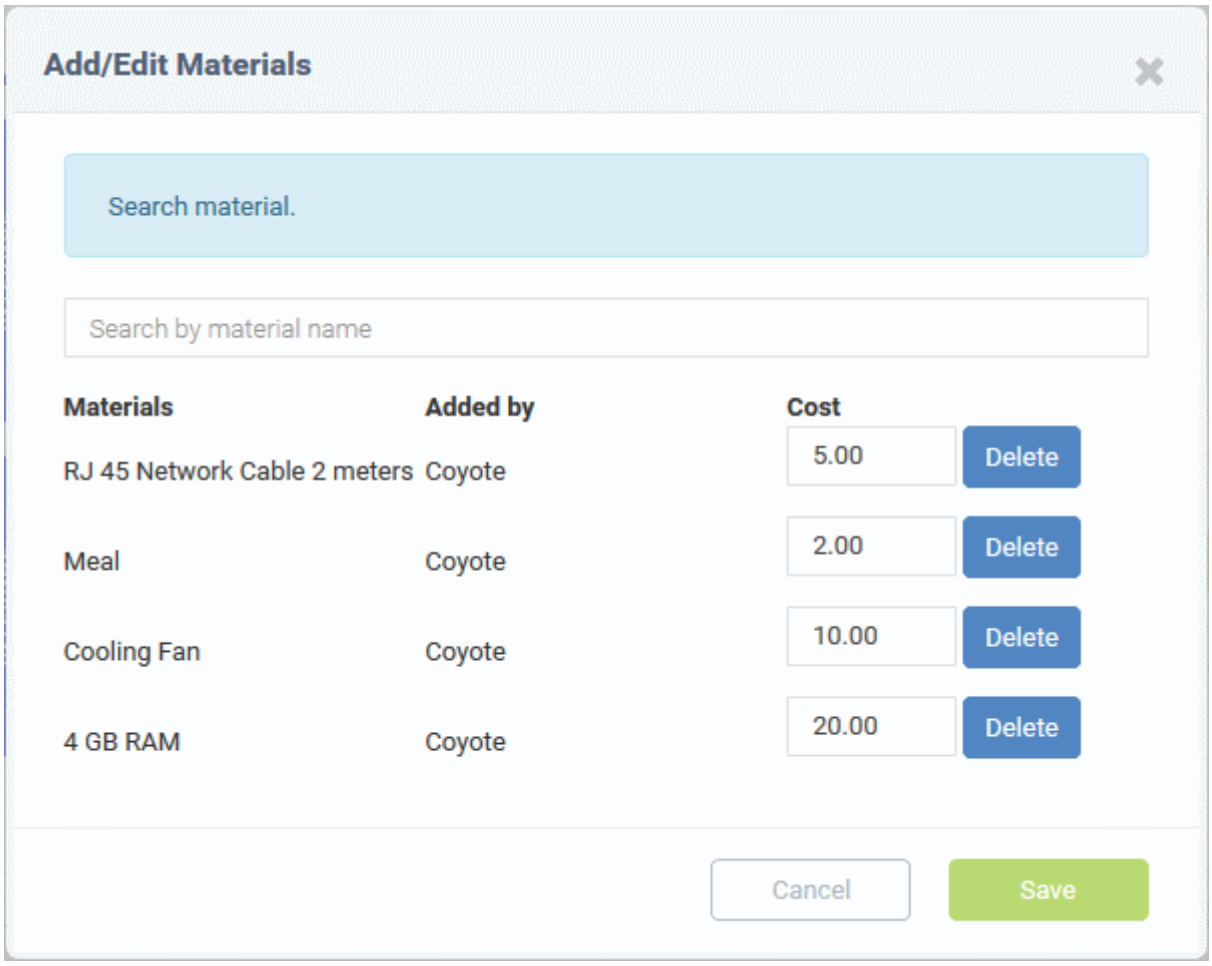
New items have an approval status of 'Awaiting'.

- Admins can approve or reject expense items in 'Admin Panel' > 'Staff' > 'Material Approval'.
- See '**Material Approval**' in the admin guide if you need more help with this.

Add new items, edit prices or remove items from a ticket

- Open a ticket's details by clicking it's number in the 'Tickets' interface
- Click the 'Add Material' button

The 'Add/Edit Materials' dialog will open. Any materials which have already been added will be listed in the dialog:



- Start typing the name of an item in the search dialog. Select the item you wish to add from the options that appear in the drop-down.
- Edit the figures in the 'Cost' field to change the cost of the item.
- Click the 'Delete' button to remove an item.
- Click 'Save' for your changes to take effect.

Create a Schedule for the Ticket

A task schedule allows you to pick a time-slot in the future to start a ticket. For example, you could create a schedule for task that involves an on-site visit.

- The schedule will be added to your calendar.
- You can view your calendar from the 'My Calendar' interface ('Staff Panel' > 'Calendars'). See **Manage Calendars** if you need more help with calendars.
- You can re-schedule a ticket at anytime. Your calendar will be updated according to the new schedule.

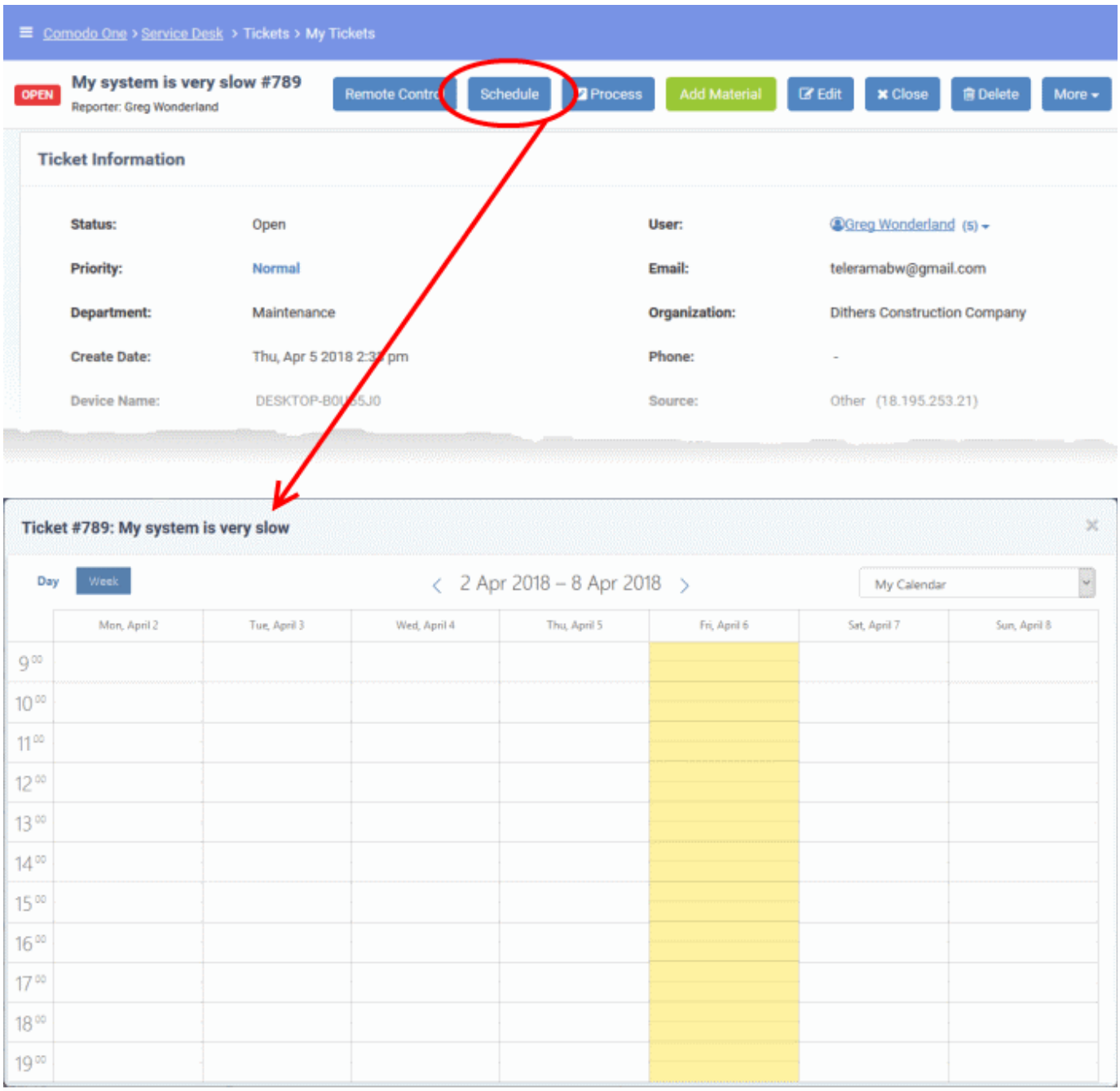
Tip: You can also create a schedule for a ticket without opening it. See **Schedule a Ticket** in **Manage Tickets** for more details.

To create a schedule for the ticket

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open

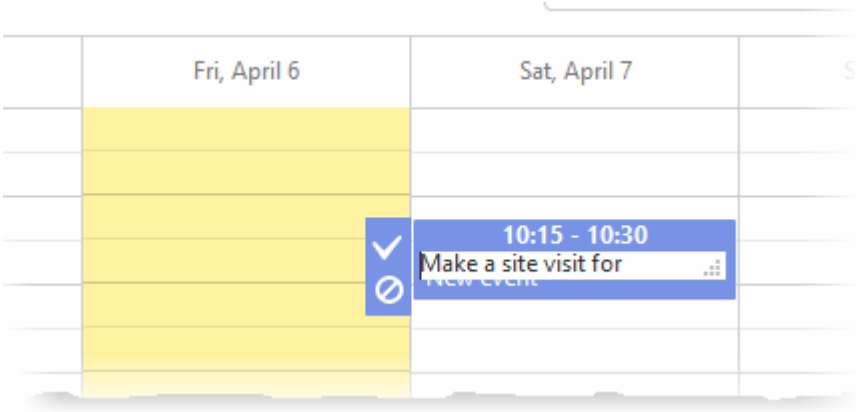
- Click the 'Schedule' button

Your calendar will open with the ticket details shown on the title bar:



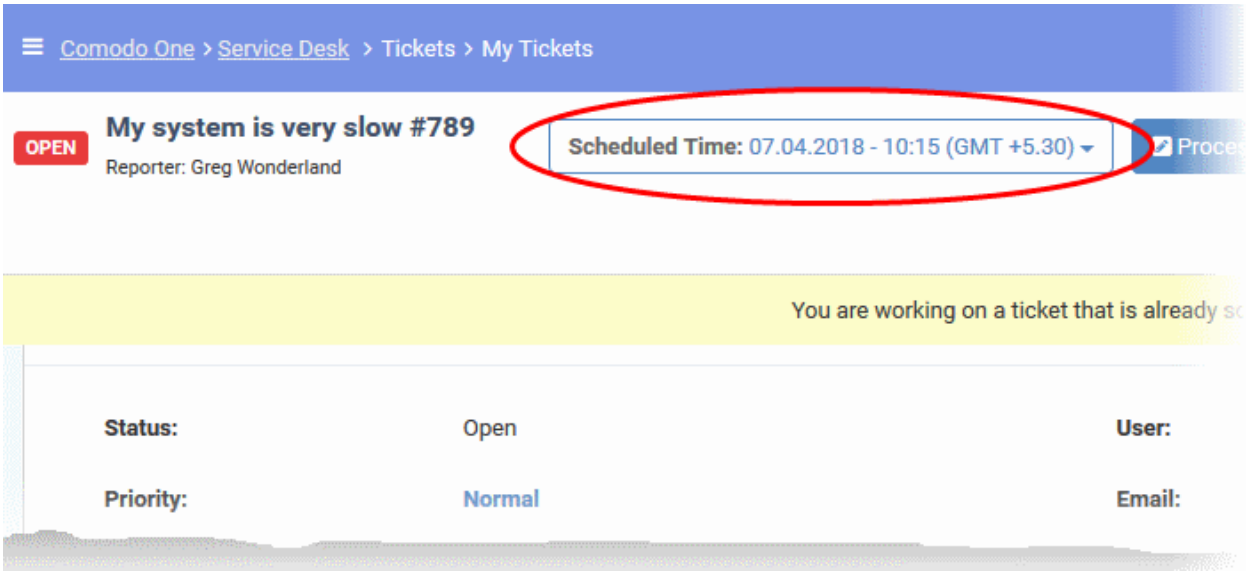
- The current week will be displayed by default. You can view the current week or day by clicking the respective button above the calendar.
- To move to next week/day, use the '>' buttons on the top

- Double-click on the time-slot which you wish to schedule for the ticket
- Enter a short description of the task



- Click the tick mark to save the schedule

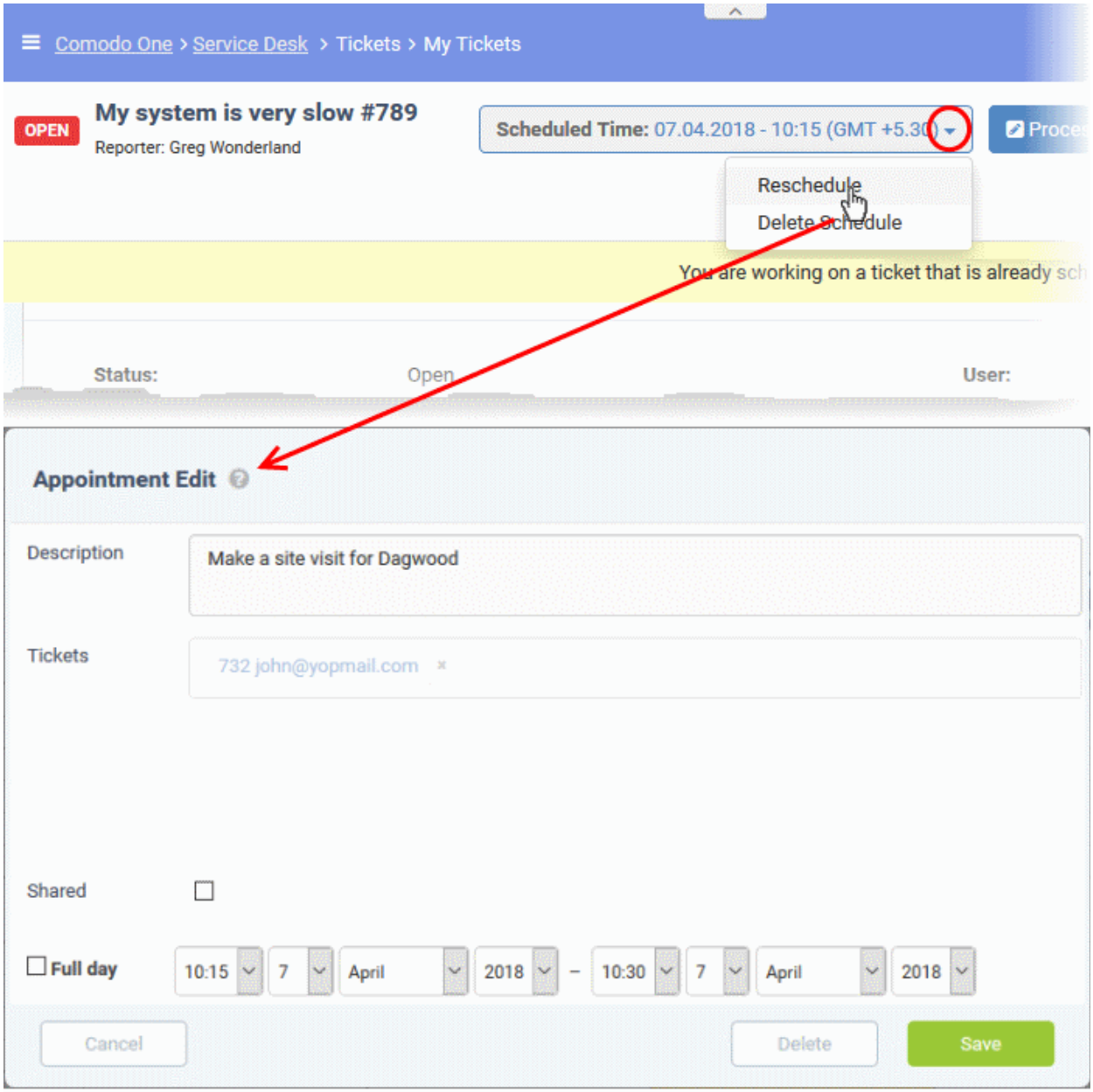
The schedule will be displayed at the top of the 'Ticket Details' screen. You can reschedule or delete the schedule at any time.



The appointment will also be added to the calendar. You can view your calendar from the 'My Calendar' interface ('Staff Panel' > 'Calendars'). See **Manage Calendars** if you need more help with calendars.

To change the schedule for a ticket

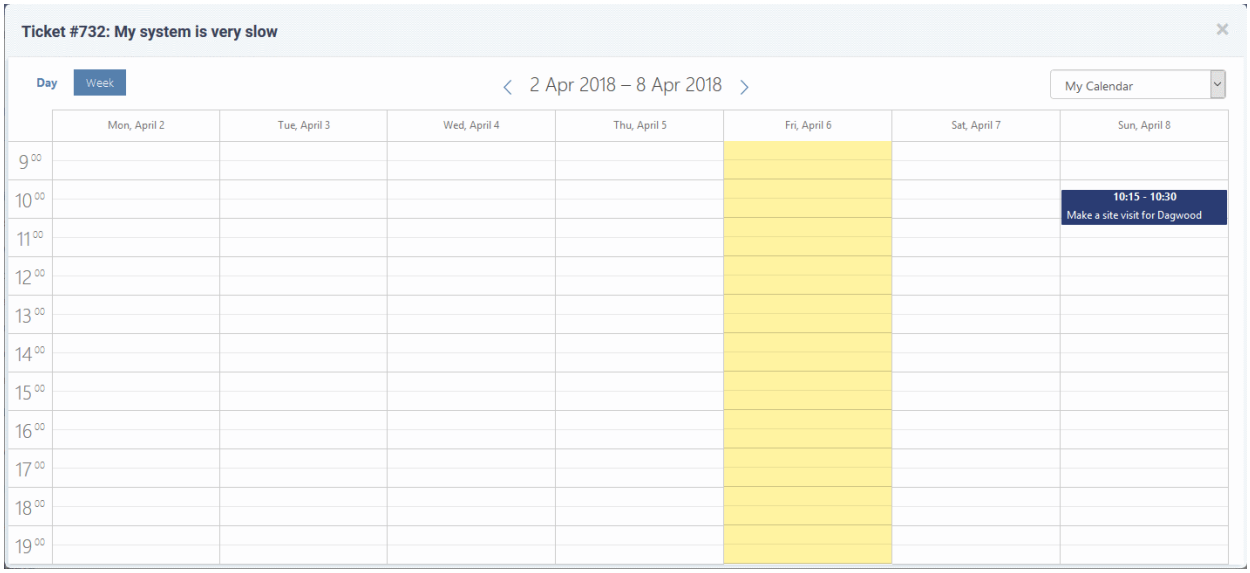
- Click 'Tickets' then a ticket type ('Scheduled', 'Open', 'Unassigned', 'Overdue', etc)
- Click the number of the scheduled ticket you want to open
- Click the 'Scheduled Time' box and select 'Reschedule' from the drop-down



The 'Appointment Edit' dialog will open.

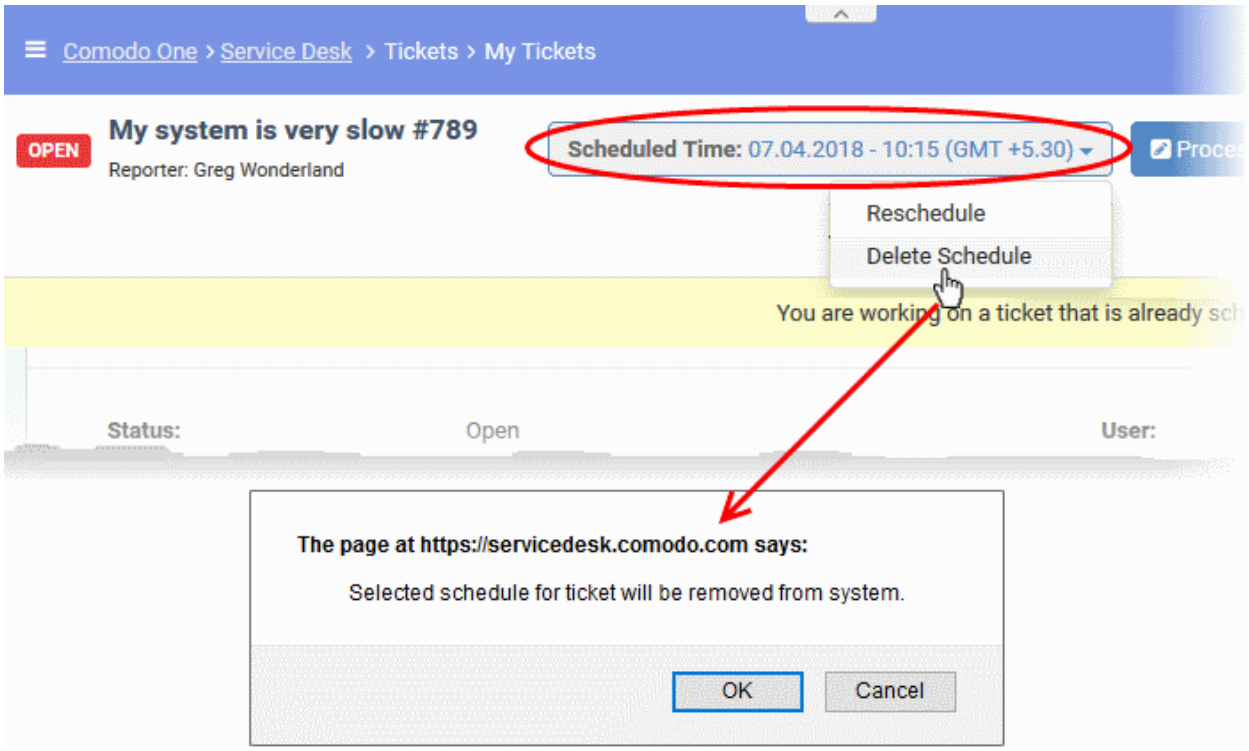
- Description - Task details as entered when creating the appointment. Edit the description as required.
- Tickets - Lists all tickets associated with the appointment. Click the 'X' button at the right to remove the ticket if required.
- Shared - Select whether the appointment should be added to the shared calendar. See **Manage Calendars** for more details on shared calendar entries.
- The start and end time of the existing schedule period are shown in the time boxes. You can edit these as required.
- Select 'Full Day' if the appointment should take all slots in your working day.
- Click 'Save' to save your changes.

Your calendar will be updated with the new schedule/appointment



To remove a schedule

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Scheduled', 'Open', 'Unassigned', 'Overdue', etc)
- Click the number of the scheduled ticket you want to open
- Click the 'Scheduled Time' box and select 'Reschedule' from the drop-down



- Click 'OK' in the confirmation dialog

The schedule will be removed and your calendar will be updated accordingly.

Create a Knowledge Base article from a ticket

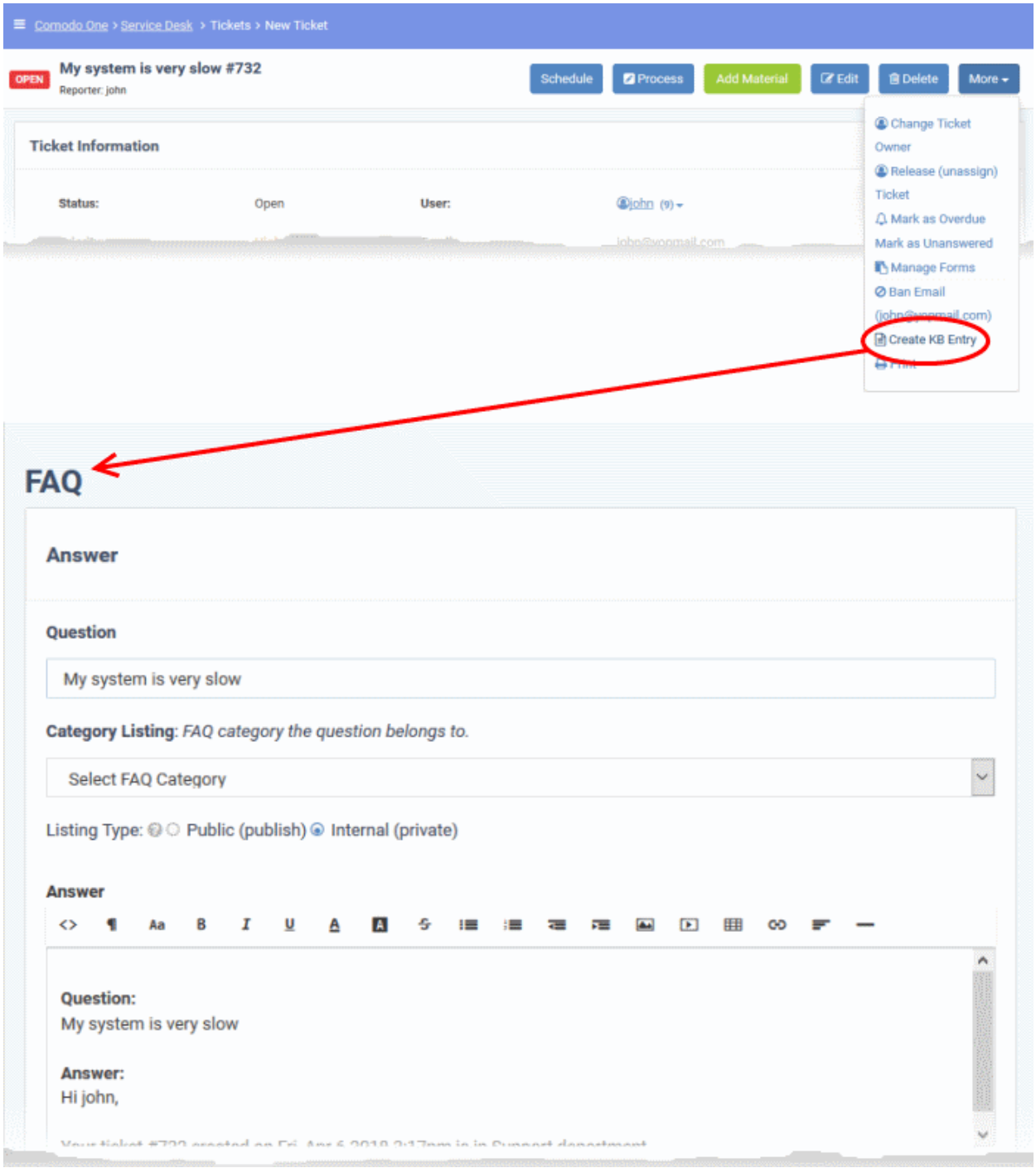
- The 'Knowledgebase' is a repository of support articles, FAQs and useful information intended to assist end-users with answers to common issues.
- It allows users to identify and solve common issues by themselves without needing to create a support

ticket.

- Apart from providing a better service to your users, knowledgebase items can also reduce staff workload.

To add a knowledgebase article from a ticket

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click 'More' then 'Create KB Entry' from the options.



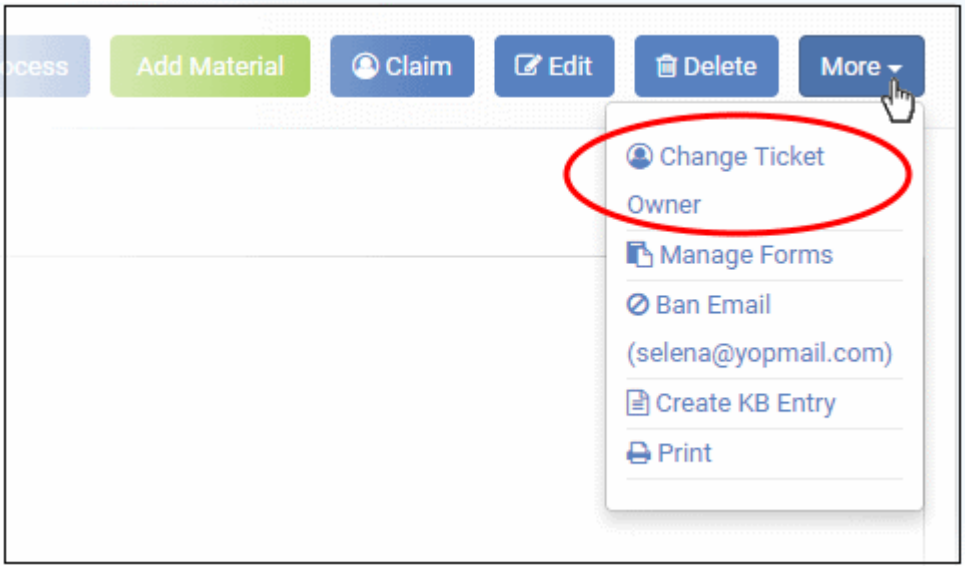
The **FAQ** screen will appear. This screen allows staff to select the category under which the FAQ will be placed. You can also specify articles which are related to the FAQ, and choose to make the FAQ 'Public' or 'Internal'. See **FAQs** for more details.

Change the ticket owner

Staff can change the user to whom the ticket belongs from the ticket details interface.

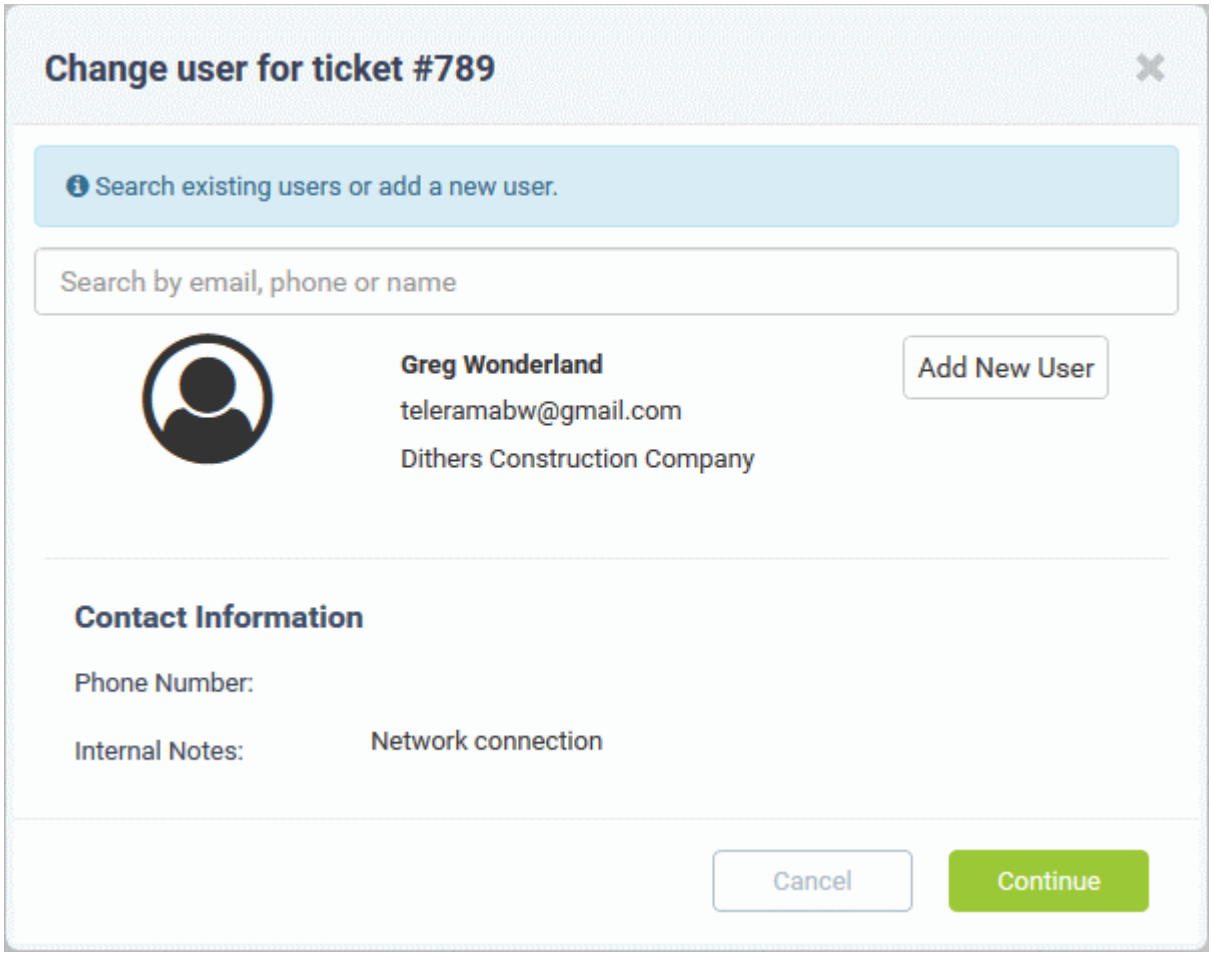
To change the ticket owner

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'More' button and choose 'Change Ticket Owner'.



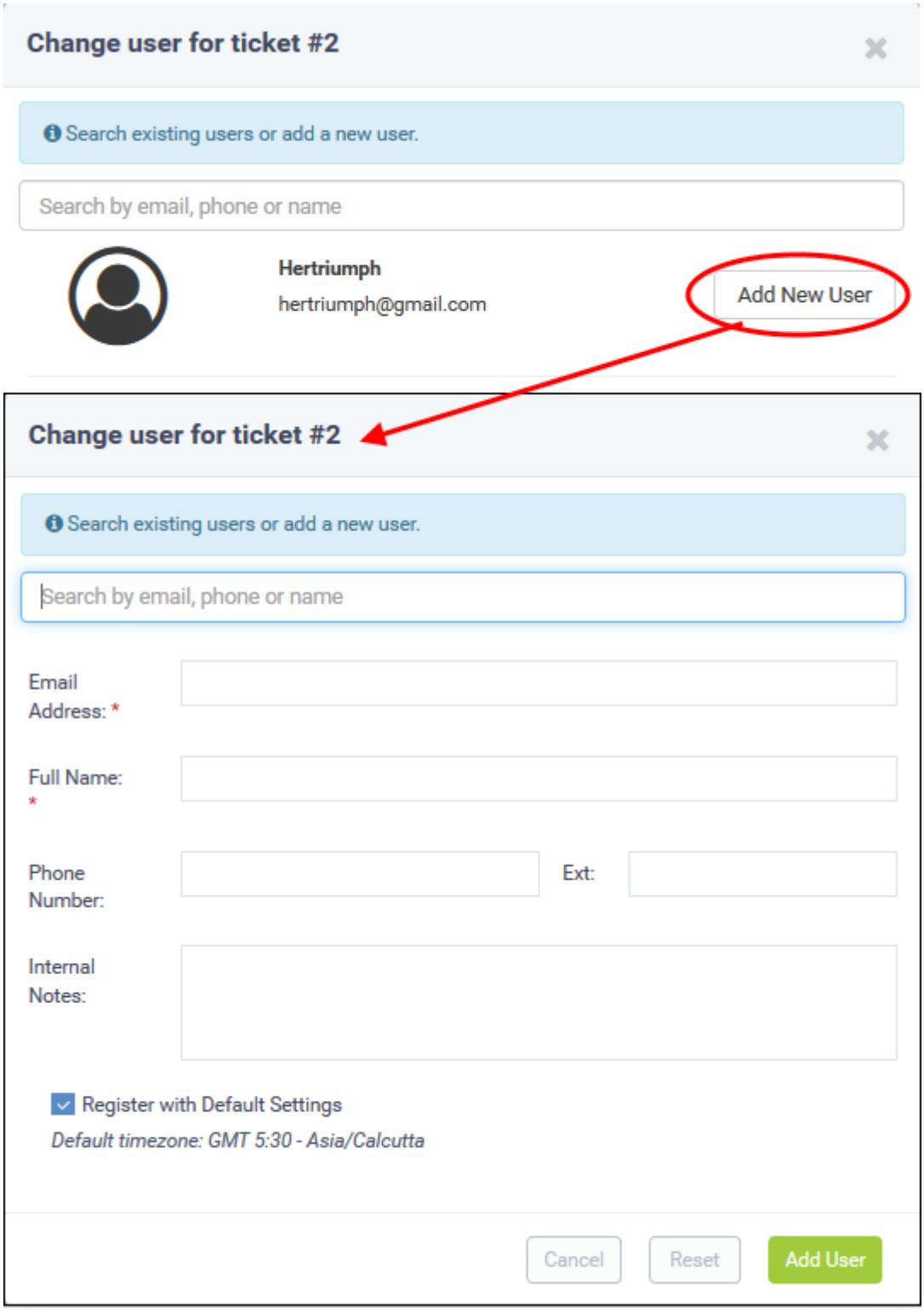
Tip: Alternatively, click 'Edit' then 'Change' beside the user name from the 'Update Ticket' screen.

The 'Change user for ticket' dialog will open:



You can change the user in two ways:

- Enter the user name or email address of an existing user in the search field. Select the user from the suggestions that appear and click 'Continue'.
- Create a new user by clicking the 'Add New User' button and complete the user details form.



- Click 'Add User' to change the ticket owner.

Tip: New users will be added as a guest users.

- You can associate new users with a customer company from the user directory interface ('Staff Panel' > 'Users' > 'User Directory' > Click on their username > Click the link next to 'Customer').

  See '**Add a user to a customer company**' in **Manage Users** more details.

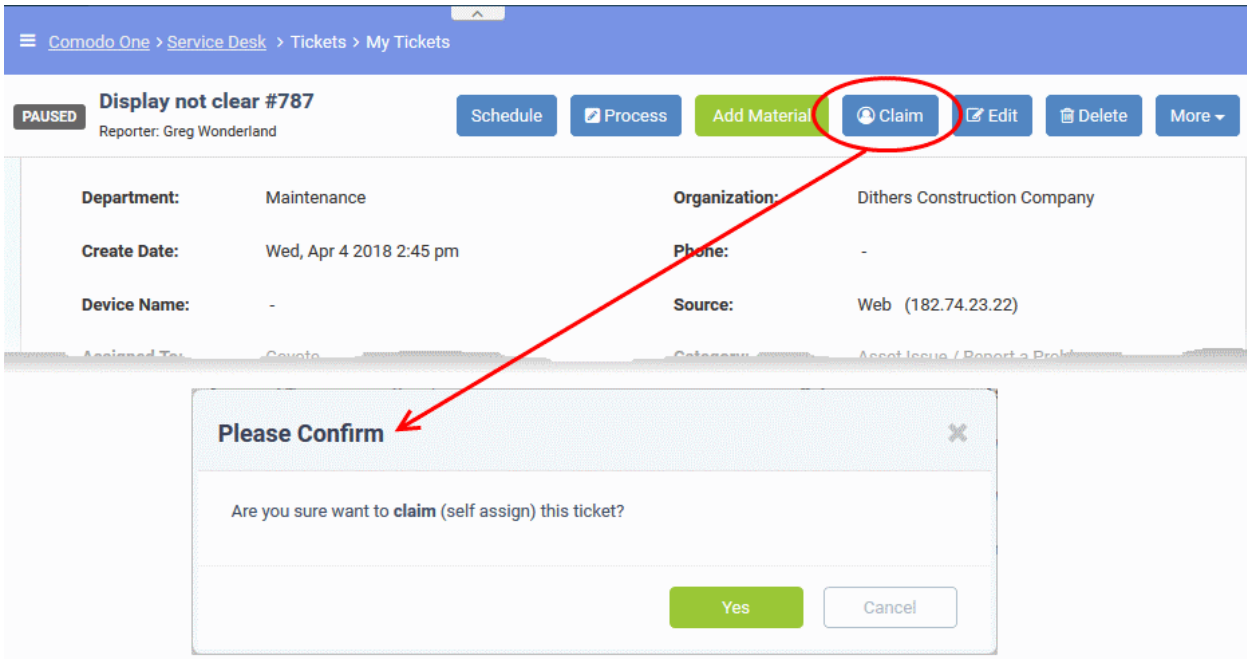
Claim / Self-assign a ticket

Unassigned tickets can be claimed in two ways:

- Unassigned tickets will be automatically assigned to the first staff member who replies if 'Claim on Response' is enabled by the administrator in the 'Ticket Settings' screen of the admin panel. See the online help page for **Ticket Settings and Options** in the admin guide.
- Staff can manually assign tickets to themselves by clicking the 'Claim' button in the ticket details screen.

To claim a ticket

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'Claim' button



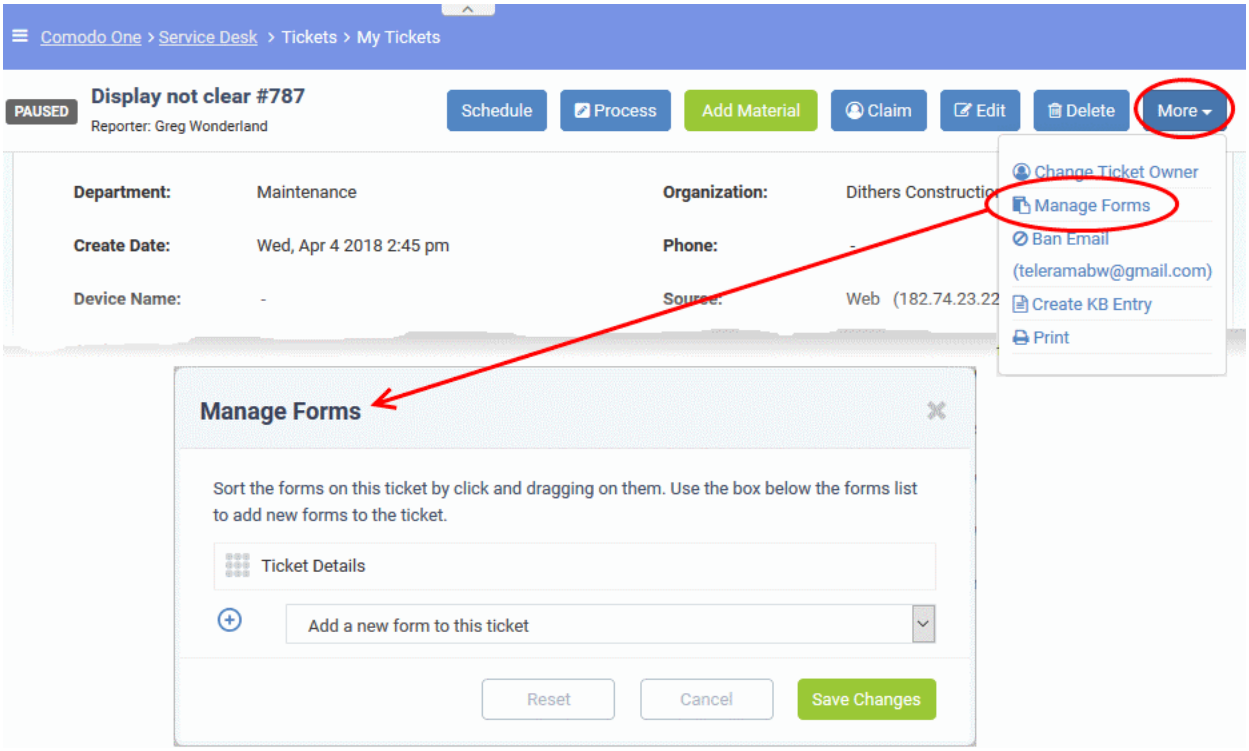
- Click 'Yes' in the confirmation screen to claim the ticket.

Manage forms for a ticket

- Staff can add custom forms to a ticket to request more details about the issue.
- Once added, the form can be completed by a staff member in the **ticket edit screen**, or by the user in the web portal.

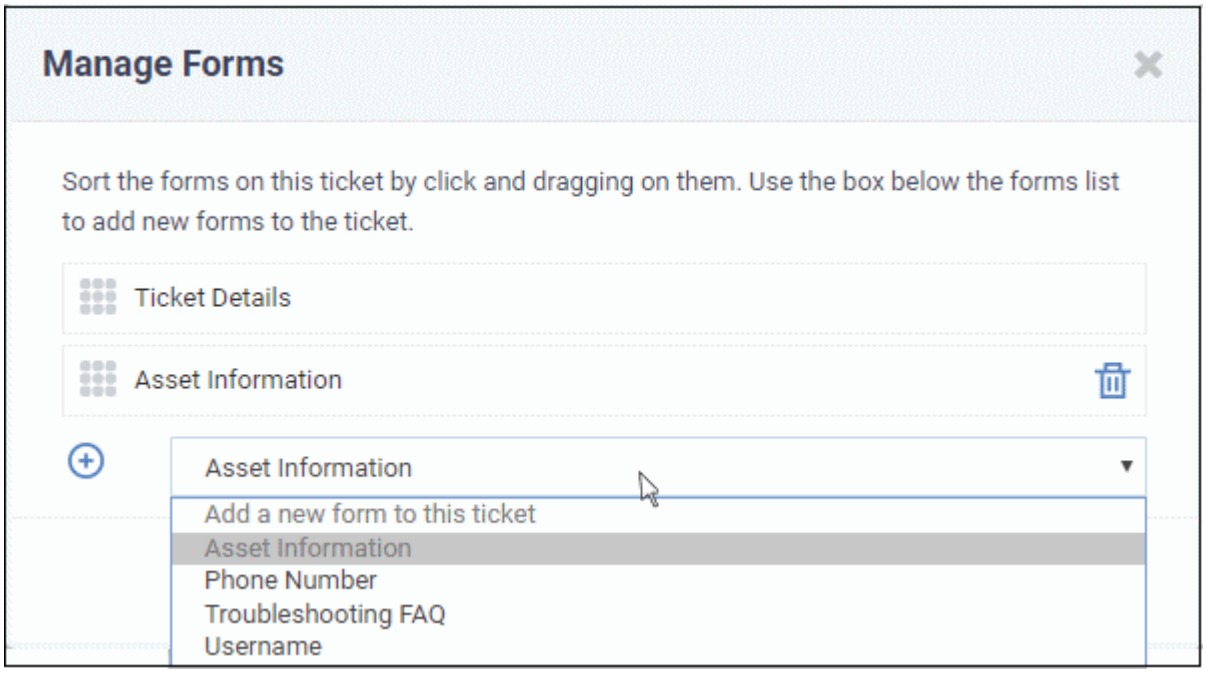
To manage the forms for a ticket

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'More' button and choose 'Manage Forms'.



The 'Manage Forms' screen will open:

- Select the form you want to add from the drop-down.
- Forms can be added by admins in 'Admin Panel' > 'Manage' > 'Forms' > 'Add Custom Form.' See the online help page for **Forms** in the admin guide for more details.



- Click the 'Save Changes' button.

Staff members can view and complete the form in the **edit screen**. It will also be visible to the user in the web portal.

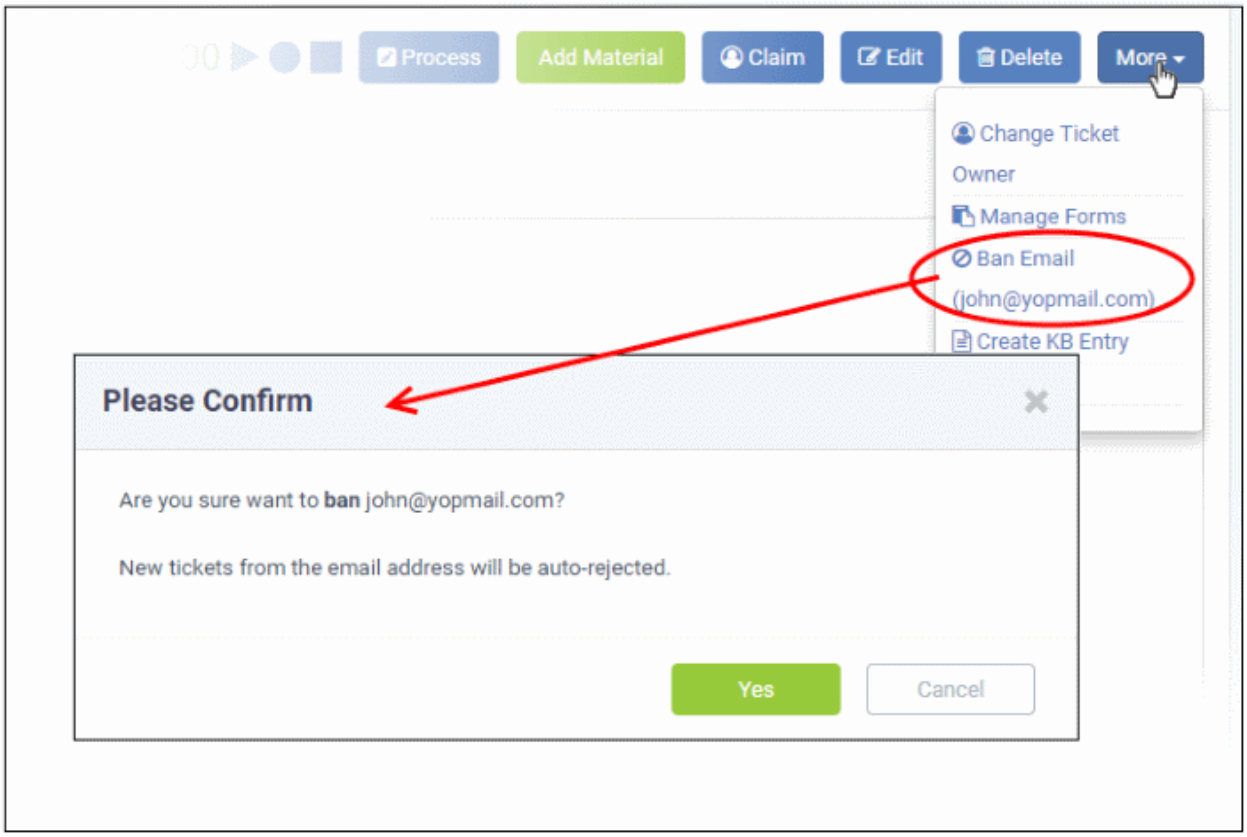
- To remove a form from a ticket, click the 'Manage Form' button then click the trash can icon beside the form.
- Click the 'Save Changes' button at the bottom.

Block email ID of a user

Service Desk allows staff to ban users so they will no longer be able to create support tickets. Users can be blocked from the details screen of tickets that they have created.

To block a user

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'More' drop-down at the top right and choose 'Ban Email'.



- Click 'Yes' in the confirmation dialog to ban the user.

Though the user may still be able to login to the web portal, they will not be able to create new tickets.

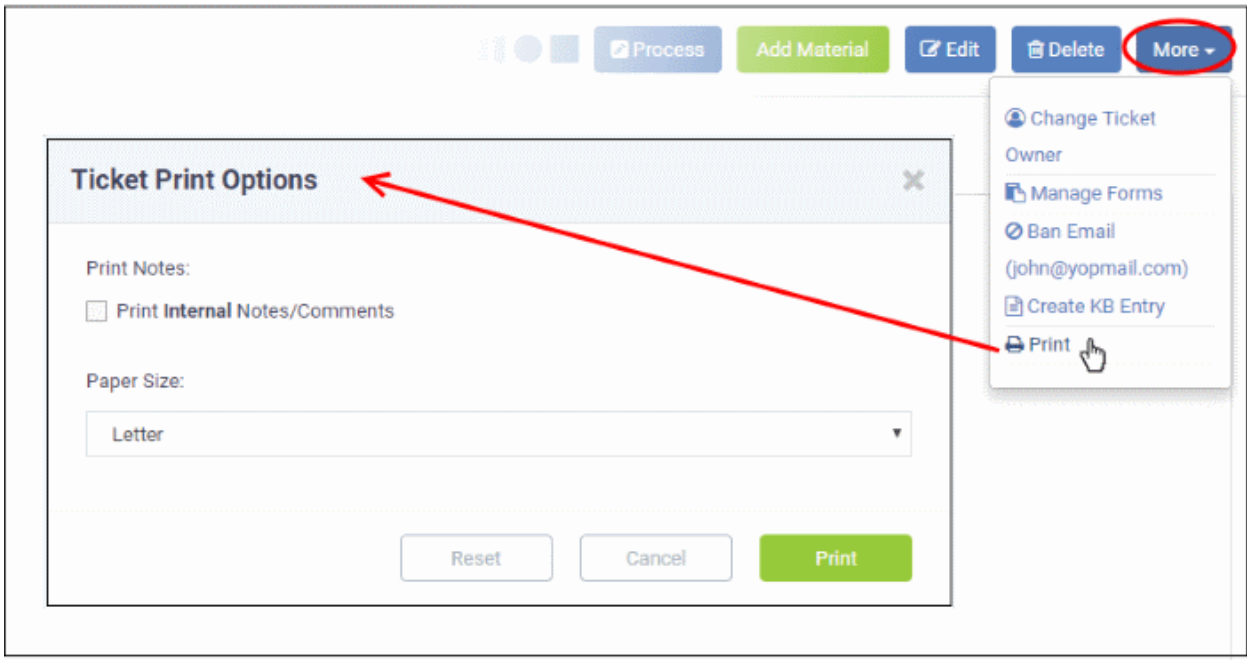
Print a Ticket

Ticket print-outs contain all ticket activity as well as the time spent on the issue.

To print a ticket

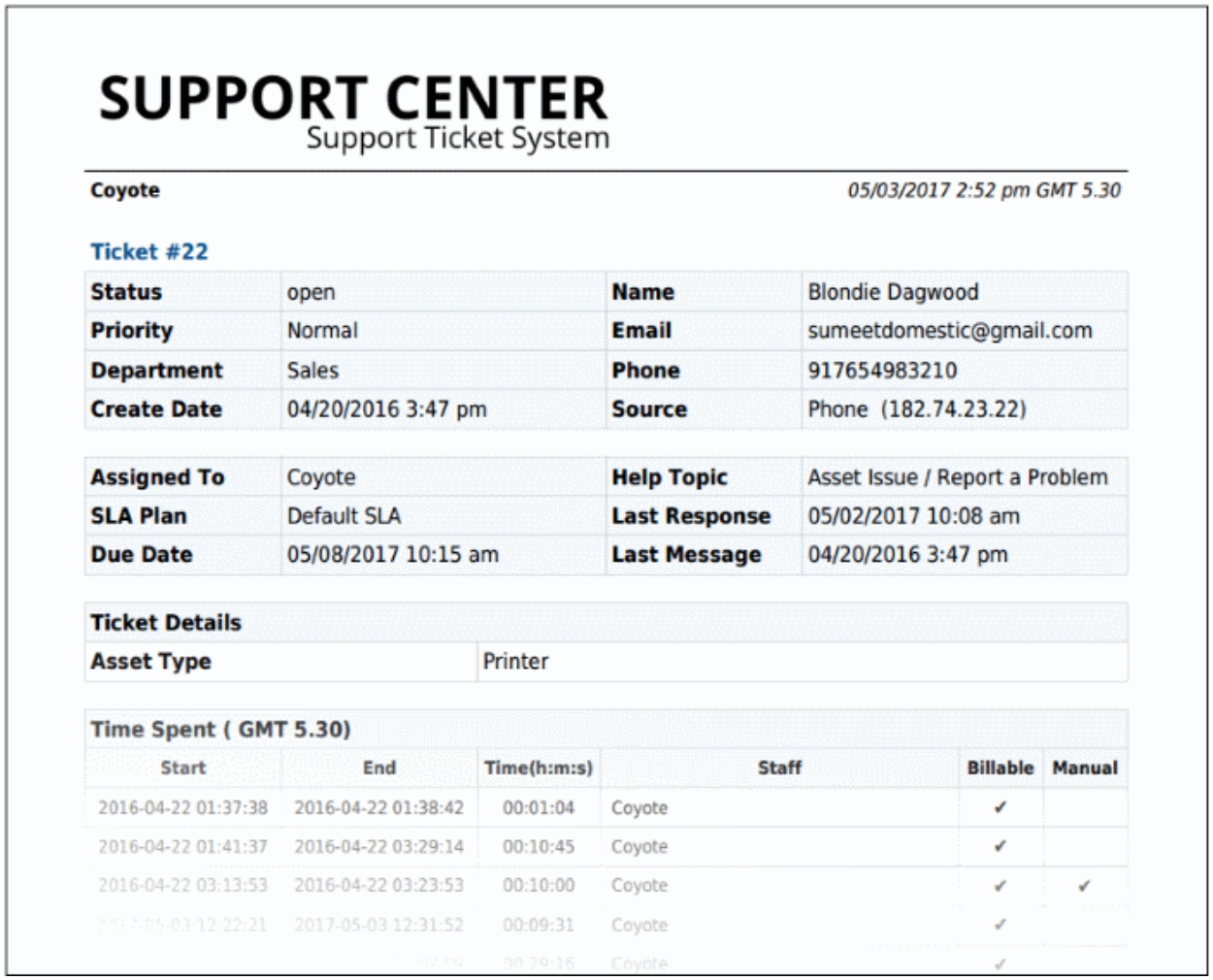
- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click 'More' then 'Print' from the options.

The options to print the ticket with or without internal notes will be displayed:



- **Print Notes**: Select if internal notes and comments should be included in the print
- **Paper Size**: Select the size and click the 'Print' button.

A PDF of the selected ticket will be generated and displayed:



SUPPORT CENTER
Support Ticket System

Coyote *05/03/2017 2:52 pm GMT 5.30*

Ticket #22

Status	open	**Name**	Blondie Dagwood
Priority	Normal	**Email**	sumeetdomestic@gmail.com
Department	Sales	**Phone**	917654983210
Create Date	04/20/2016 3:47 pm	**Source**	Phone (182.74.23.22)

Assigned To	Coyote	**Help Topic**	Asset Issue / Report a Problem
SLA Plan	Default SLA	**Last Response**	05/02/2017 10:08 am
Due Date	05/08/2017 10:15 am	**Last Message**	04/20/2016 3:47 pm

Ticket Details	
Asset Type	Printer

Time Spent (GMT 5.30)

Start	End	Time(h:m:s)	Staff	Billable	Manual
2016-04-22 01:37:38	2016-04-22 01:38:42	00:01:04	Coyote	✓	
2016-04-22 01:41:37	2016-04-22 03:29:14	00:10:45	Coyote	✓	
2016-04-22 03:13:53	2016-04-22 03:23:53	00:10:00	Coyote	✓	✓
2017-05-03 12:22:21	2017-05-03 12:31:52	00:09:31	Coyote	✓	
		00:29:16	Coyote	✓	

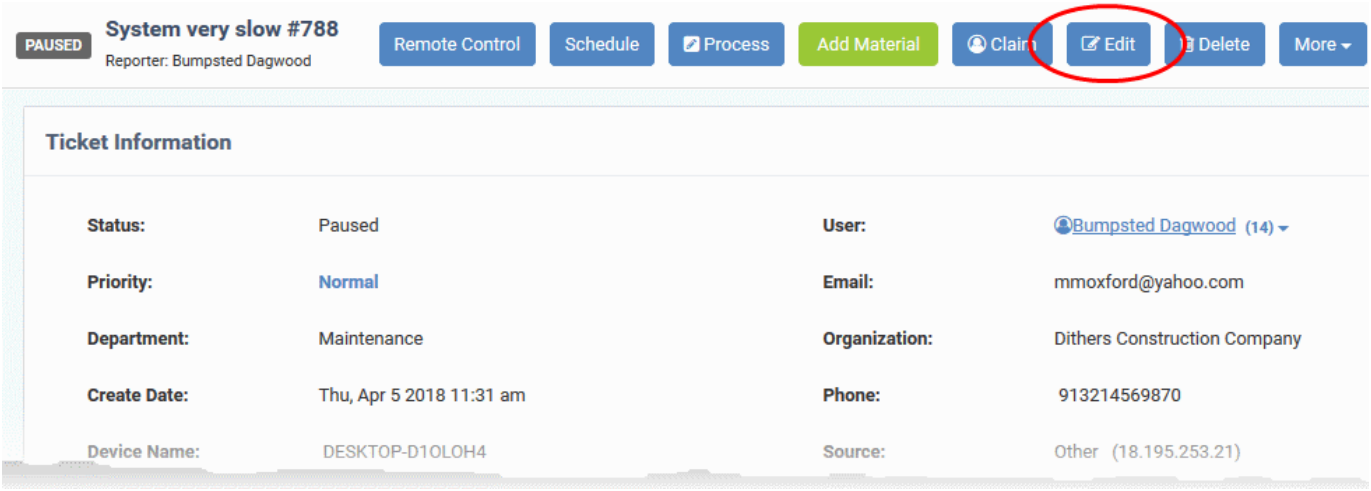
- Save the file for your future reference and/or print the ticket from the pdf file.

Edit a ticket

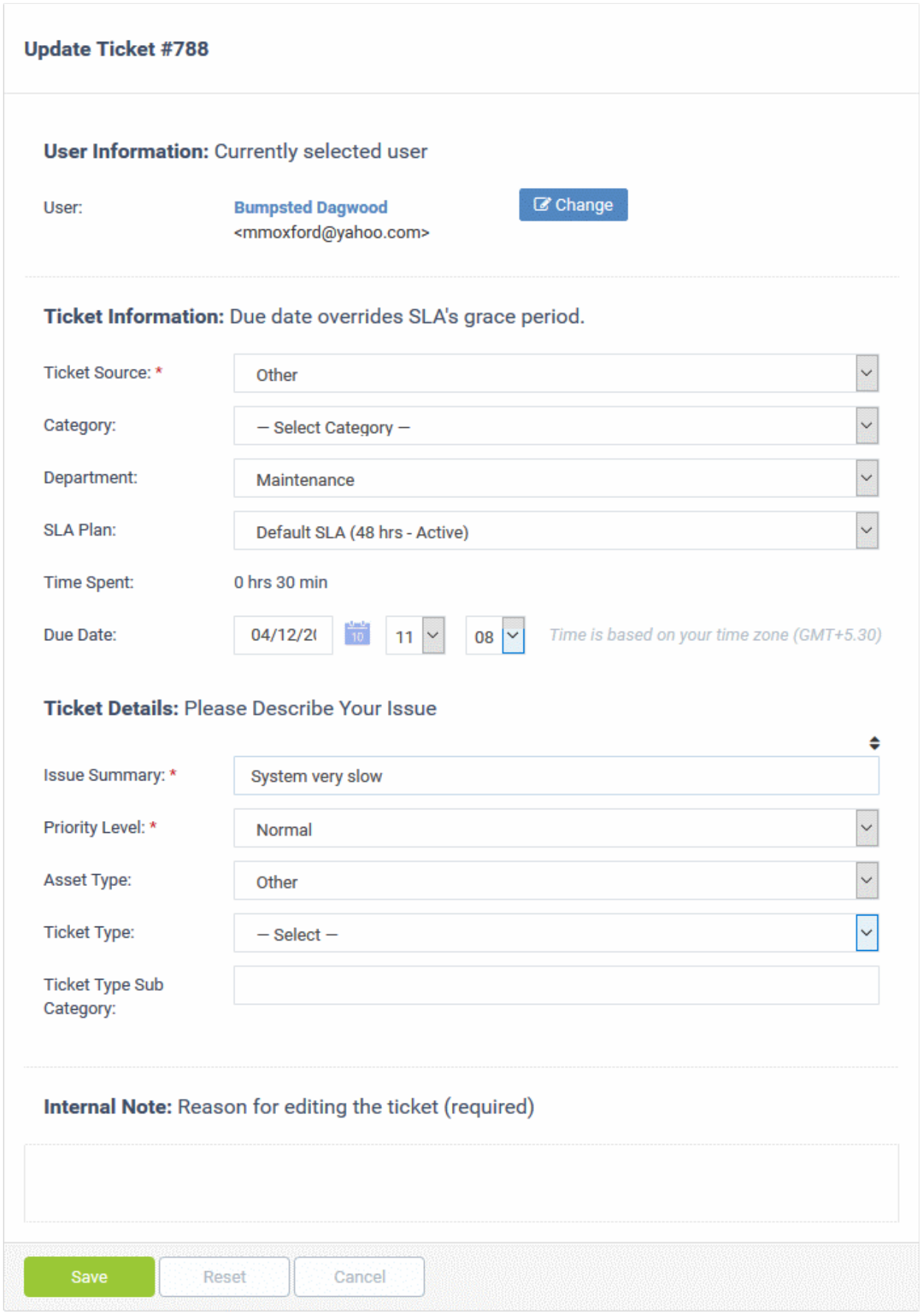
Basic ticket details can be updated at anytime from the 'Ticket Details' interface.

To edit a ticket

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'Edit' button



The 'Update Ticket' screen will appear:

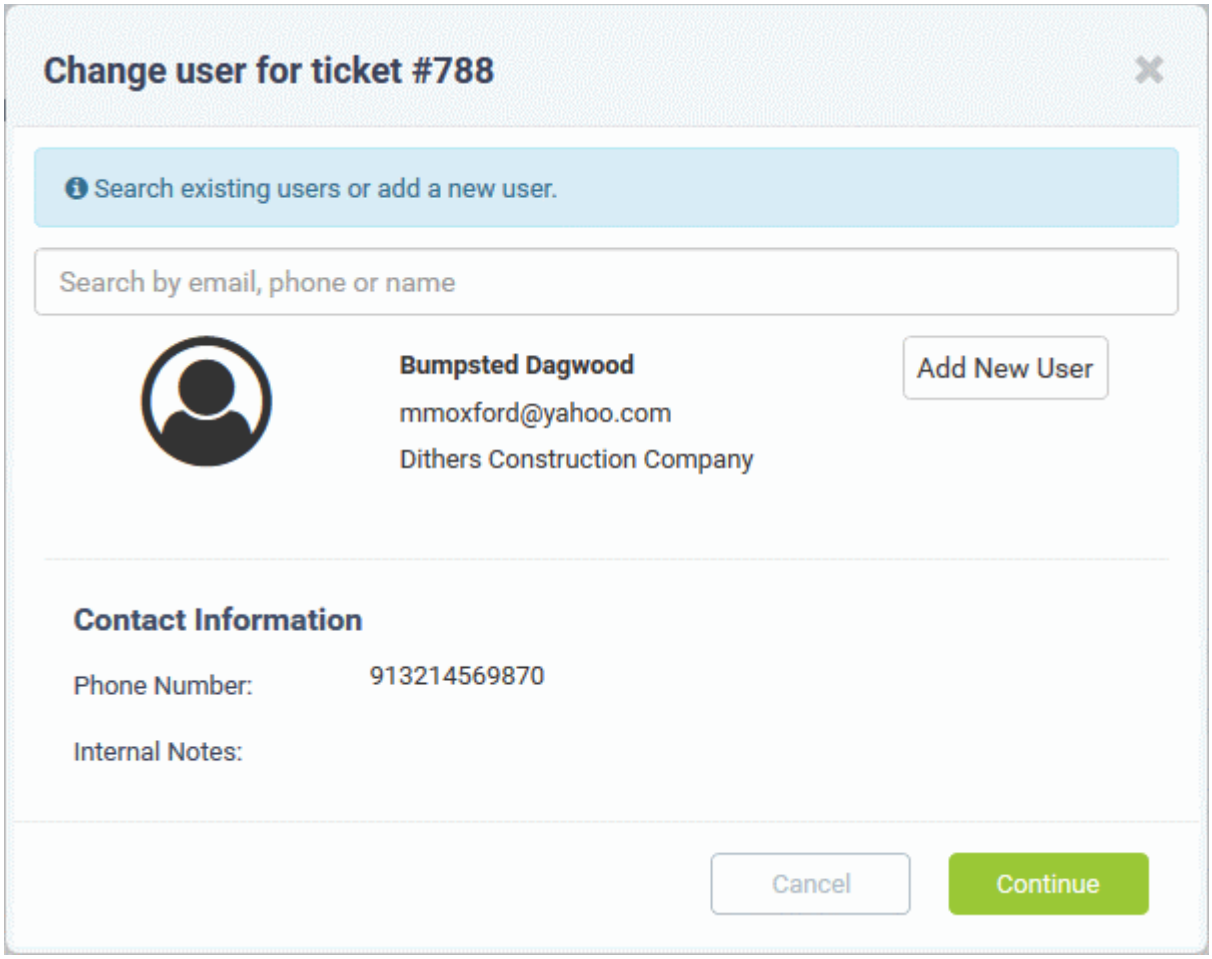


User Information

Details about the user who submitted the ticket, or on whose behalf the ticket was submitted. This user is also known

as the 'Owner' of the ticket. You change the ticket owner from this area.

- **User:** The name of the ticket owner and their email address
  - Click the 'Change' button to specify a different owner. You can change the user by:
    - Entering the user name or email of an existing user in the search field. Select from the suggestions that appear.
    - Creating a new user. Click the 'Add New User' button and complete the user details form.

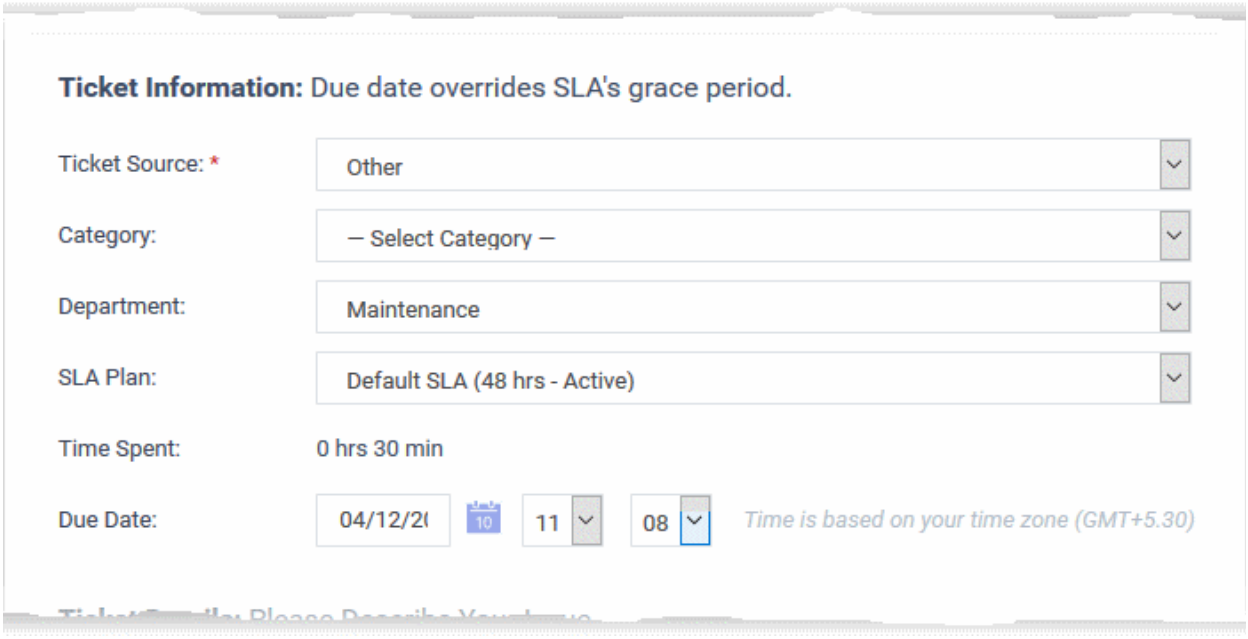


Tip: New users will be added as guest users.

- You can associate new users with a customer company from the user directory interface ('Staff Panel' > 'Users' > 'User Directory' > Click on their username > Click the link next to 'Customer').
- See '**Add a user to a customer company**' in **Manage Users** more details.

Ticket Information

Ticket information is fetched automatically from the system. You can change these details as required.



- **Ticket Source:** The channel through which the ticket was created. Change the source if required.
- **Category:** The help topic under which this ticket falls. You can change the ticket category if required.
- **Department**: The department to which the ticket is currently assigned. You will need to change the department if the ticket needs to be assigned to a staff member in a different department.
    - Choose the new department from the drop-down

Tip: You can also change the department to which a ticket is assigned from the 'Actions' pane of the 'Ticket Details' interface. See **Change the department** for more details.

- **SLA Plan**: The service level plan associated with the ticket. This depends on the settings in Ticket Filters, Ticket Category, Department or the default SLA settings. You can also manually change the SLA plan if required.
    - Choose the new SLA plan from the drop-down
- **Time Spent**: The total time spent so far on the ticket.
- **Due Date**: Allows you to change the due date and time of the ticket. This overrides the period defined in the SLA plan assigned to the ticket.

Ticket Details

Ticket details area shows the basic details of the ticket, entered when creating it. It contains both the default fields and custom form fields depending on the settings. See '**Manage Forms for the ticket**' for more details.

- **Issue Summary:** The description that was entered when the ticket was created.
- **Priority Level**: Ticket priority is set by Ticket Filters, Ticket Category, Department or default priority settings. You can manually change the priority, if required.
    - Choose the new priority level for the ticket from the drop-down
- **Asset Type**: The category of asset that was selected when the ticket was created.
    - Change the asset type using the drop-down if required.
- **Ticket Type:** The type of category selected while creating the ticket. The options available are 'Alert', 'Order' and 'Problem'.
    - Change the type using the drop-down, if required.
- **Ticket Type Sub Category**: Specific issue type as chosen by the person who created the ticket. For example, 'Overheating' may be a sub-category of 'Problem'.

- Change the sub-category, if required.

Internal Note

The 'Internal Note' area lets you enter a reason for updating ticket details.

- Click the 'Save' button to update the ticket

Close and Reopen tickets

Staff members can close tickets if all tasks are complete. All billable time will be assigned to the customer. If required, staff members can reopen closed tickets.

Notes:

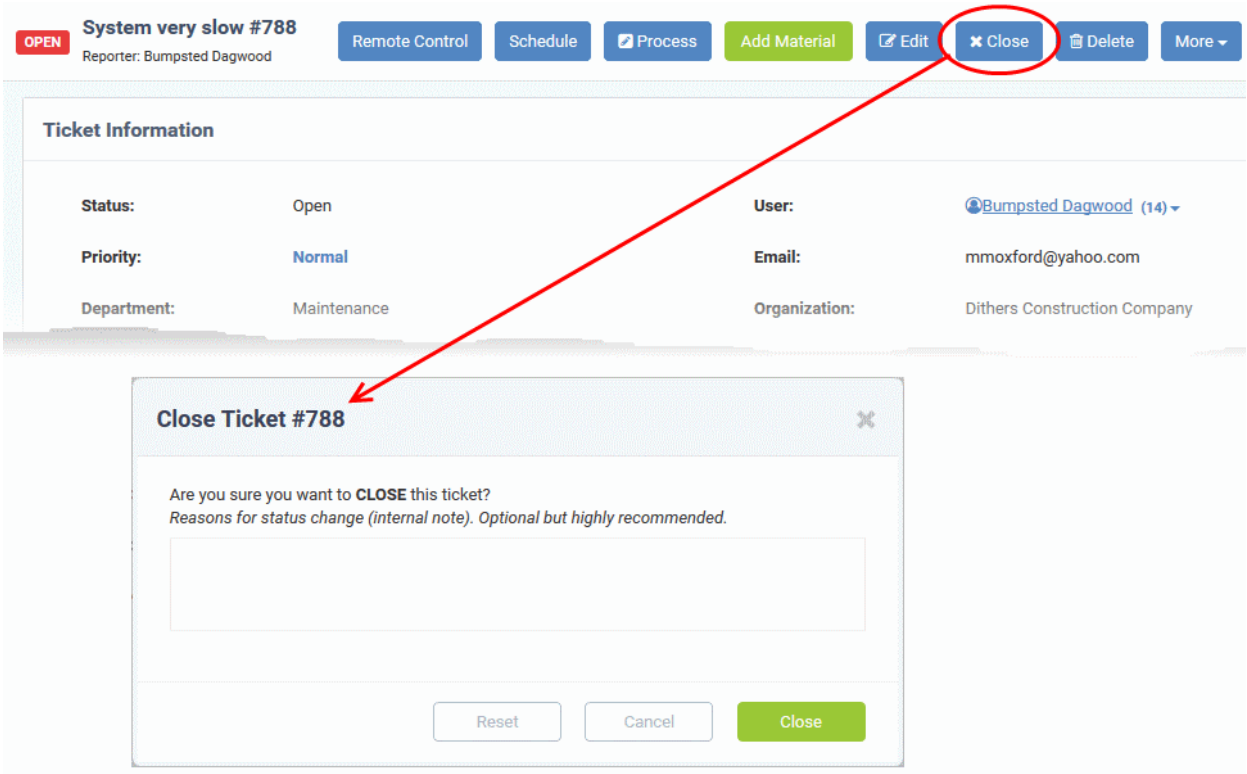
- You can close a ticket only if it has an 'Open' status. 'Paused' tickets cannot be closed. If required, you can resume the ticket and close it. See **Pause and resume a ticket** if you need help with this.
- Staff members can only close tickets that are assigned to them
- Admins can close tickets assigned to any staff member
- You can also add a resolution status when you close a ticket.

You can close a ticket in two ways:

1. Manually - Click the 'Close' button at the top of the interface. See the explanation given **below**.
2. Close a ticket after sending a reply. See **Post a reply** for more details.

To manually close a ticket

- Open the 'Ticket Details' screen of the ticket, if it is not already opened
  - Open the 'Staff' panel (see last link on the left)
  - Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
  - Click the number of the ticket you want to open
- Click the 'Close' button

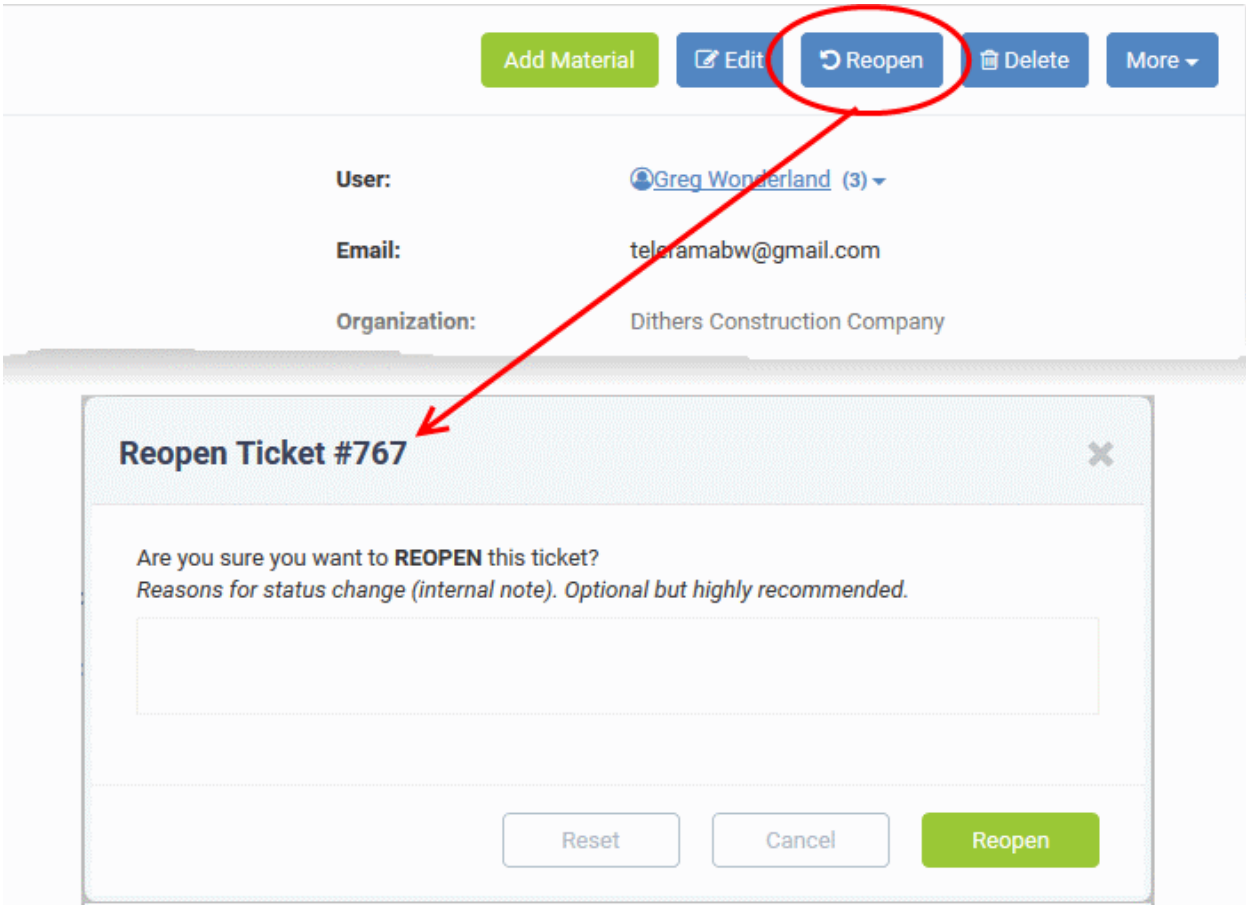


- Enter the reason and click 'Close'

To re-open a closed ticket

- Click 'Staff Panel' > 'Tickets' > 'Closed'
- Click the ticket number to open the ticket details interface.
- Click 'Reopen'

The 'Reopen Ticket' screen will be displayed:



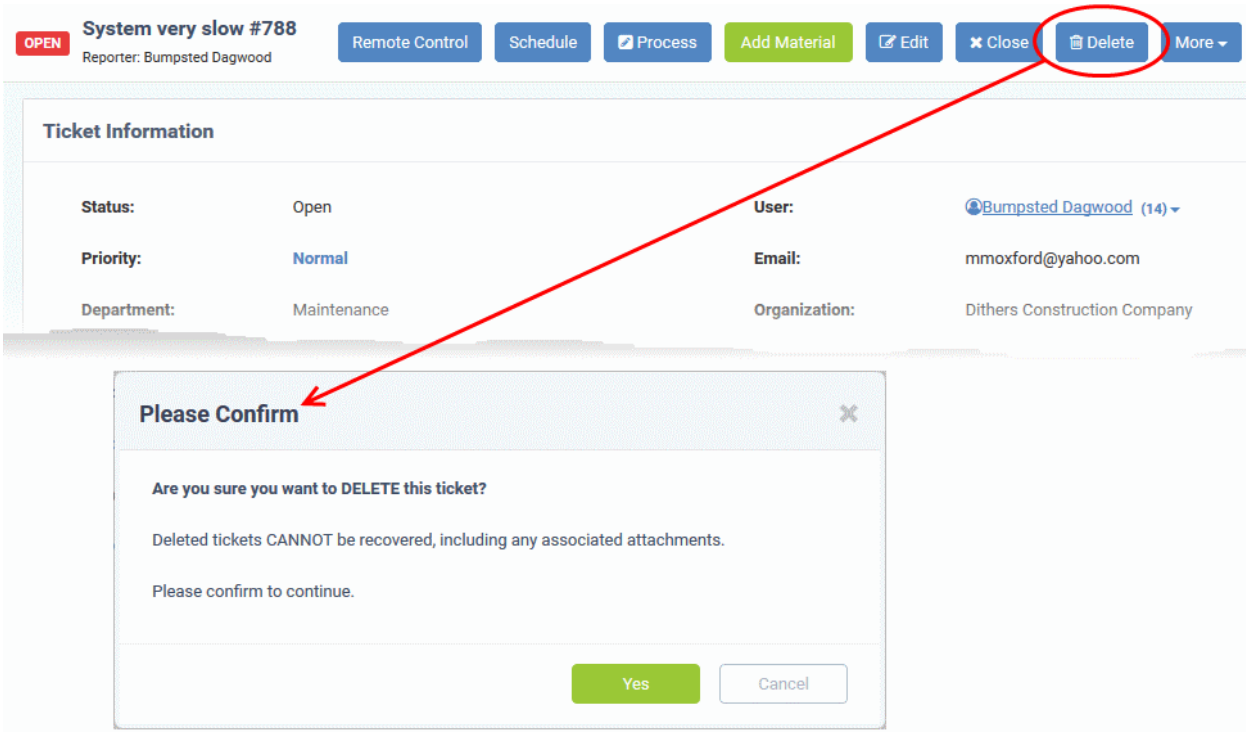
- Enter a reason for reopening then click the 'Reopen' button.

Staff members can now resume work on the ticket.

Remove a Ticket

You can delete a ticket as follows:

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to remove
- Click the 'Delete' button from the ticket details interface



- Click 'Yes' in the confirmation screen.

Please note when a ticket is deleted, it cannot be recovered.

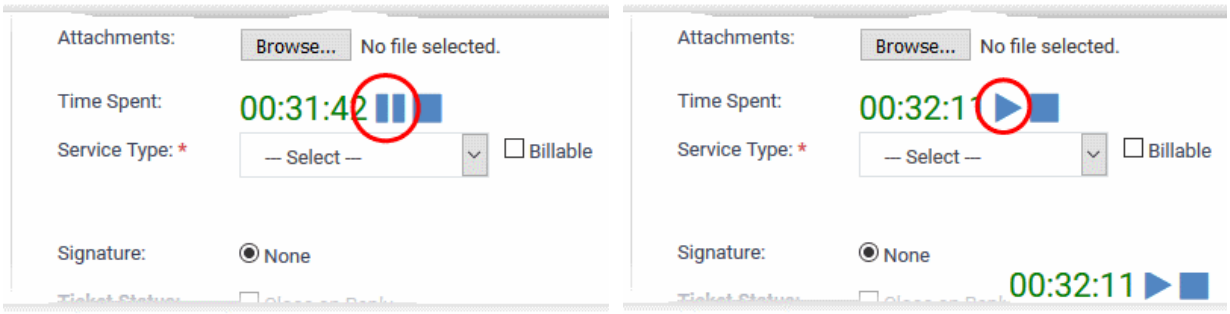
Pause and resume a Ticket

Tickets can be paused and resumed by staff. Paused tickets can only be resumed by the same staff member or by an administrator.

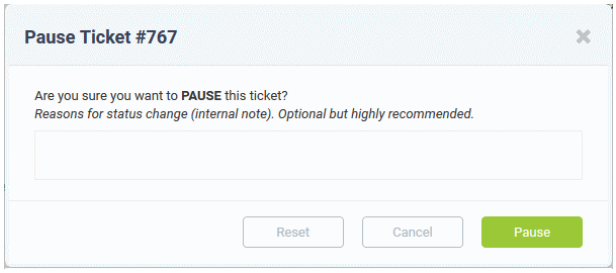
- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'Ticket Actions' stripe to open the 'Ticket Options' pane, if not already opened.

The time spent counter shows the time spent during the current support session.

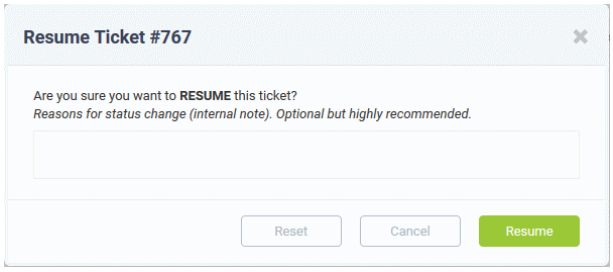
- Click the 'Pause' or 'Resume' button depending on the ticket status.



The respective internal note screen will be displayed.



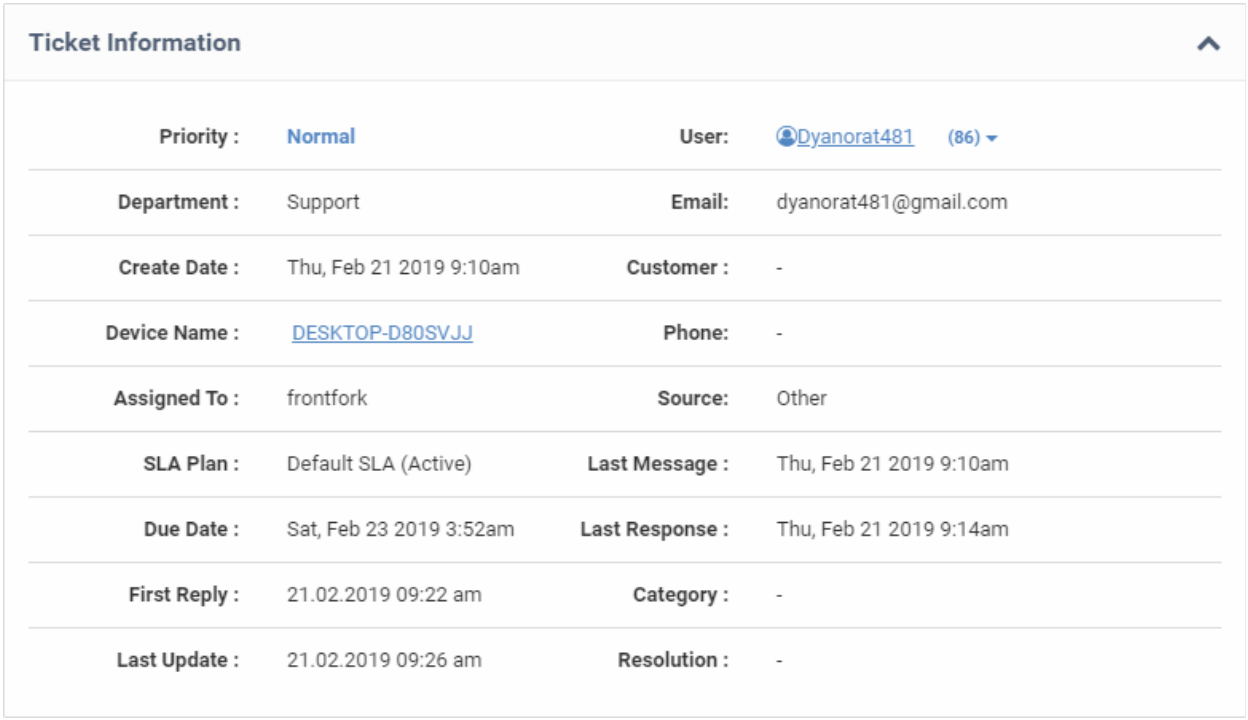
- Click the Pause button after entering the reason.



- Click the Resume button after entering the reason.

Ticket Information

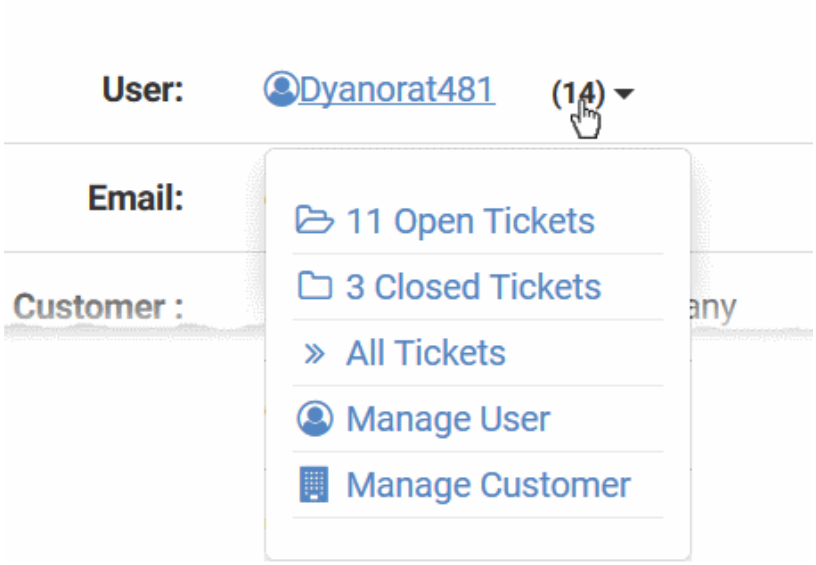
- Click the 'Ticket Information' stripe to open/close the 'Ticket Information' pane
- The 'Ticket Information' pane shows the user who raised the ticket along with ticket status, assigned staff member, due date, billable time, materials and more.
- The number of fields that are displayed depends on the 'Forms' added to the ticket by the administrator. See the online help page '**Forms**' in the admin guide for more details. The screenshot below shows a ticket with default fields:



- **Priority**: The criticality of the ticket. Priority can be inherited from the ticket category or department, or set manually during ticket creation. Staff can also change the priority of the ticket while it is in progress.
  - See **Edit a ticket** for more details.
- **Department**: The name of the department to which the ticket is assigned. Staff can change the department as required and can assign it to a different staff member in the new department. See **Edit a ticket** for more details.
- **Create Date**: The date and time at which the ticket was submitted.
- **User**: The name of the user who created the ticket, or on whose behalf the ticket was created by an agent.
  - Tickets automatically submitted by an endpoint-agent will have the name of user for whom the device is enrolled
  - The number beside the user name shows the quantity of tickets raised by the user/on behalf of

the user.

- Click the number beside a user's name to view and manage the tickets associated with the user and manage the user and the customer company to which he/she belongs. See '**Manage Users**' and '**Manage Customers**' for more details.



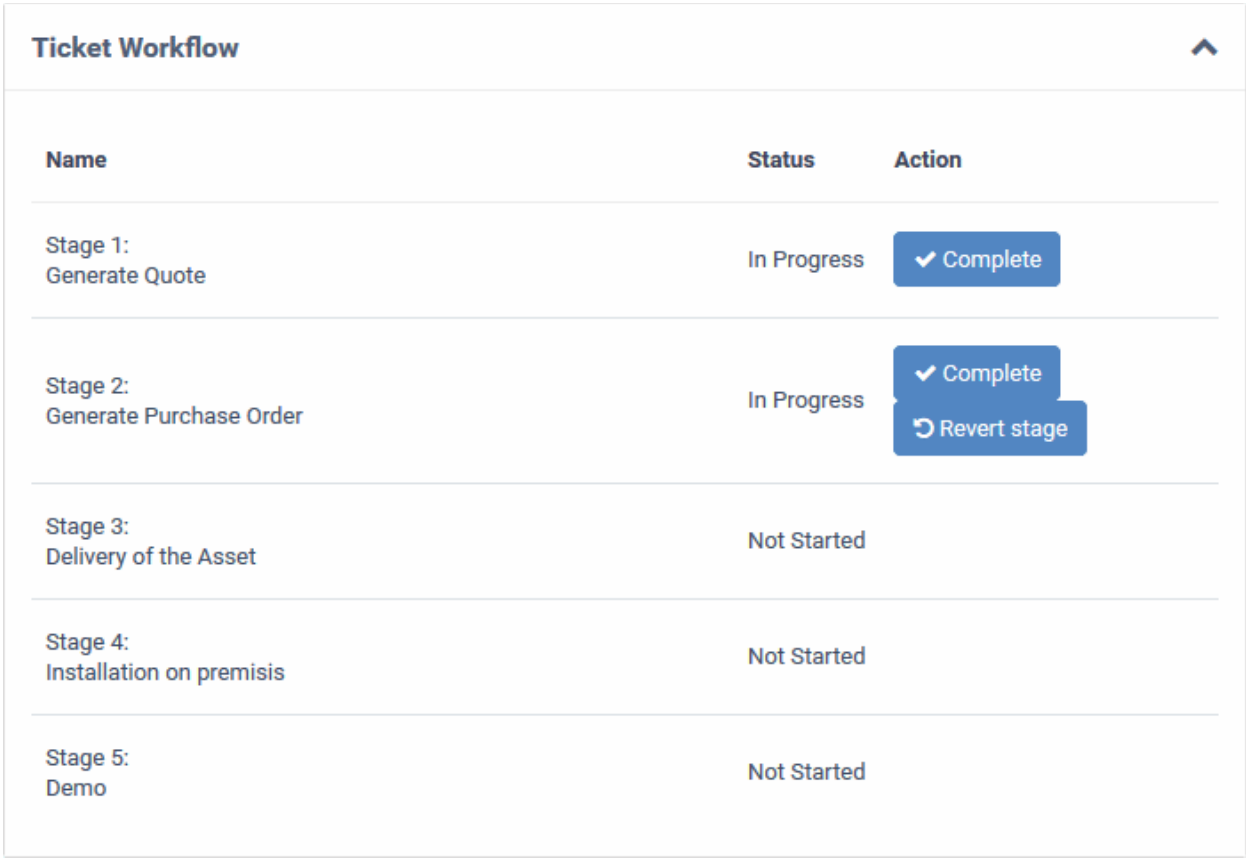
- **Email**: The email address of the user who created the ticket, or on whose behalf the ticket was created by an agent. Tickets automatically submitted by an endpoint-agent will have the email address of the user for whom the device is enrolled.
- **Customer**: The company to which the user belongs.
- **Phone**: The contact number of the user.
- **Device Name** - The label assigned to the device. The device name is shown only for tickets submitted by the EM console.
  - Click the device name to view the 'Device Summary' interface for the device in Endpoint Manager.
  - The 'Device Summary' interface contains general device information, including operating system details, hardware details, last activity, Comodo Client - Security (CCS) configuration, resource usage and more.
  - See **http://help.comodo.com/topic-399-1-786-10175-View-Summary-Information.html** for more details of the information contained in this interface.
- **Source**: The channel through which the ticket was created. Possible values are 'Web', 'Phone' and 'Email'.
- **Assigned To**: The name of the staff member to whom the ticket is currently assigned. You can re-assign the ticket to a different staff member/agent from the 'Actions' area. Refer to the explanation under **Reassign Ticket** for more details.
- **SLA Plan**: The service level plan associated with the ticket. The SLA can be inherited from the ticket category or the department. Staff can change the SLA if required while working on a ticket. See **Edit a ticket** for more details.
- **Due Date**: The date and time before which the ticket should be closed. The due date will be auto-generated based on the SLA plan and the department, or manually set by an agent during ticket creation. You can change the due date by editing the ticket. Refer to the explanation under **Edit a ticket** for more details.
- **Category**: The ticket category that was selected by the user when creating the ticket.
- **Last Message**: The date and time at which the most recent reply was received from the user.
- **Last Response**: The date and time of the most recent reply was sent or a note was posted by a staff member.
- **First Reply** - Date and time at which the first response was sent to the user by a staff member
- **Last Update** - The date and time at which the ticket was most recently updated

- **Asset Type:** The type of item which the ticket concerns. For example, 'Workstation', 'Printer', 'Server' etc. The asset type can be chosen when creating the ticket. This helps to determine the billing rate.
- **Ticket Type:** The broad class of issue as chosen by the user or staff member who created the ticket. The options available are 'Alert', 'Order' and 'Problem'.
- **Ticket Type Sub-Category**: Specific issue type as chosen by the person who created the ticket. For example, 'Overheating' may be a sub-category of 'Problem'.
- **Resolution**: A description of the fix/solution. Alternatively, this may contain a description of the steps taken so far, and those that remain, in order to bring about a fix. This is set by the staff member attending to the ticket.

Ticket Workflow

- Click the 'Ticket Workflow' stripe to open/close the 'Ticket Workflow' pane

The 'Ticket Workflow' pane appears only for multi-stage tickets. It shows all stages added to the ticket based on the ticket category.



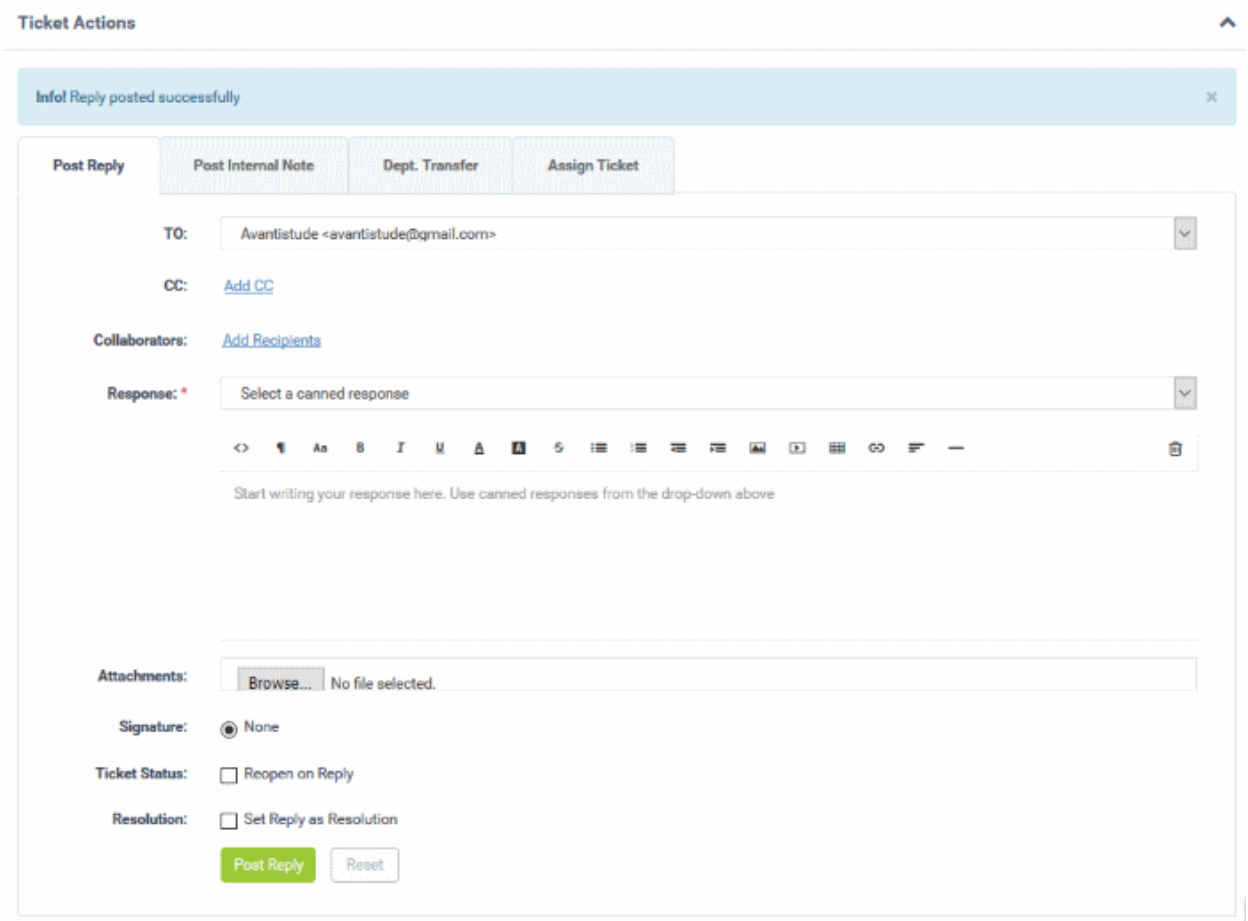
- Specific departments and staff members can be assigned responsibility of each stage.
- Once a staff member has completed their stage, the ticket will be assigned to the next department/staff member.
- This process will continue till the final stage is completed and closed.
- A ticket can be moved to the previous stage by clicking 'Revert stage'.
- An alert email is sent to the admin/staff and the user whenever a ticket is transferred from one stage to other, if configured in the respective ticket category.
    - See **Ticket Process Options** in **Ticket Categories** in the Service Desk admin guide for more details.

Actions

- Click the 'Ticket Actions' stripe to open/close the 'Ticket Actions' pane

The 'Ticket Actions' pane allows staff to post replies, claim a ticket, assign/re-assign a ticket, add materials, pause/resume a ticket and more.

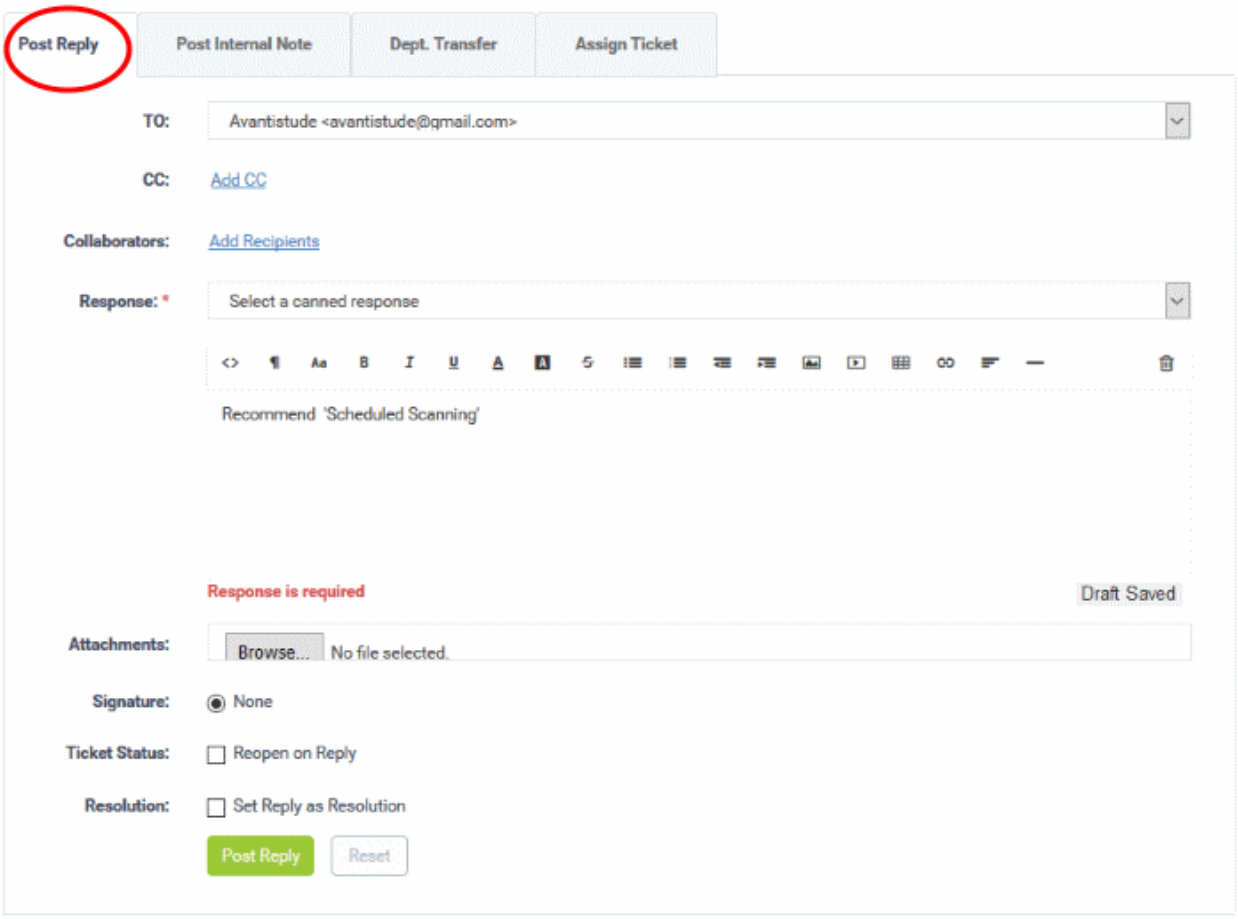
- **Post a reply**
- **Post an internal note**



- **Change the department**
- **Reassign the ticket**
- **Create a quote for billable items**

Post a reply to a ticket

- Click the 'Post Reply' tab

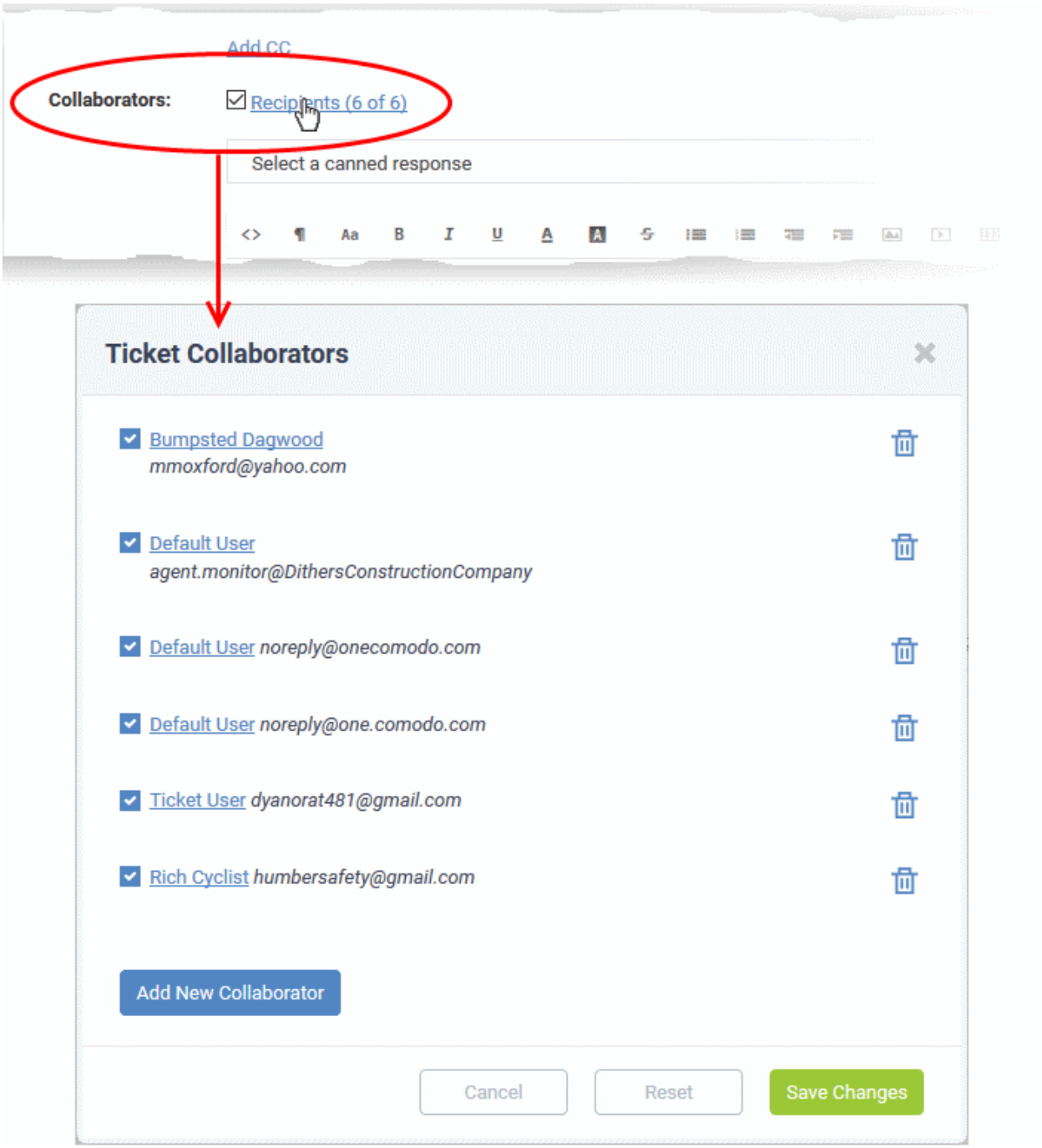


- **From**: The email address used to send the reply to the user. The 'Customers' interface allows you to set default 'From' addresses for each customer. See **Manage Customer Details** in **Manage Customers** for more details. If required, you can choose a different email address from the drop-down too.
- **To:** The recipient's email address. Alternatively, select the option 'Do Not Email Reply'. The user can view the response only in the web portal if the latter is selected.
    - Click the **Add CC** link to add more recipients.
- **Collaborators:** Add people who also worked on the ticket as additional recipients.

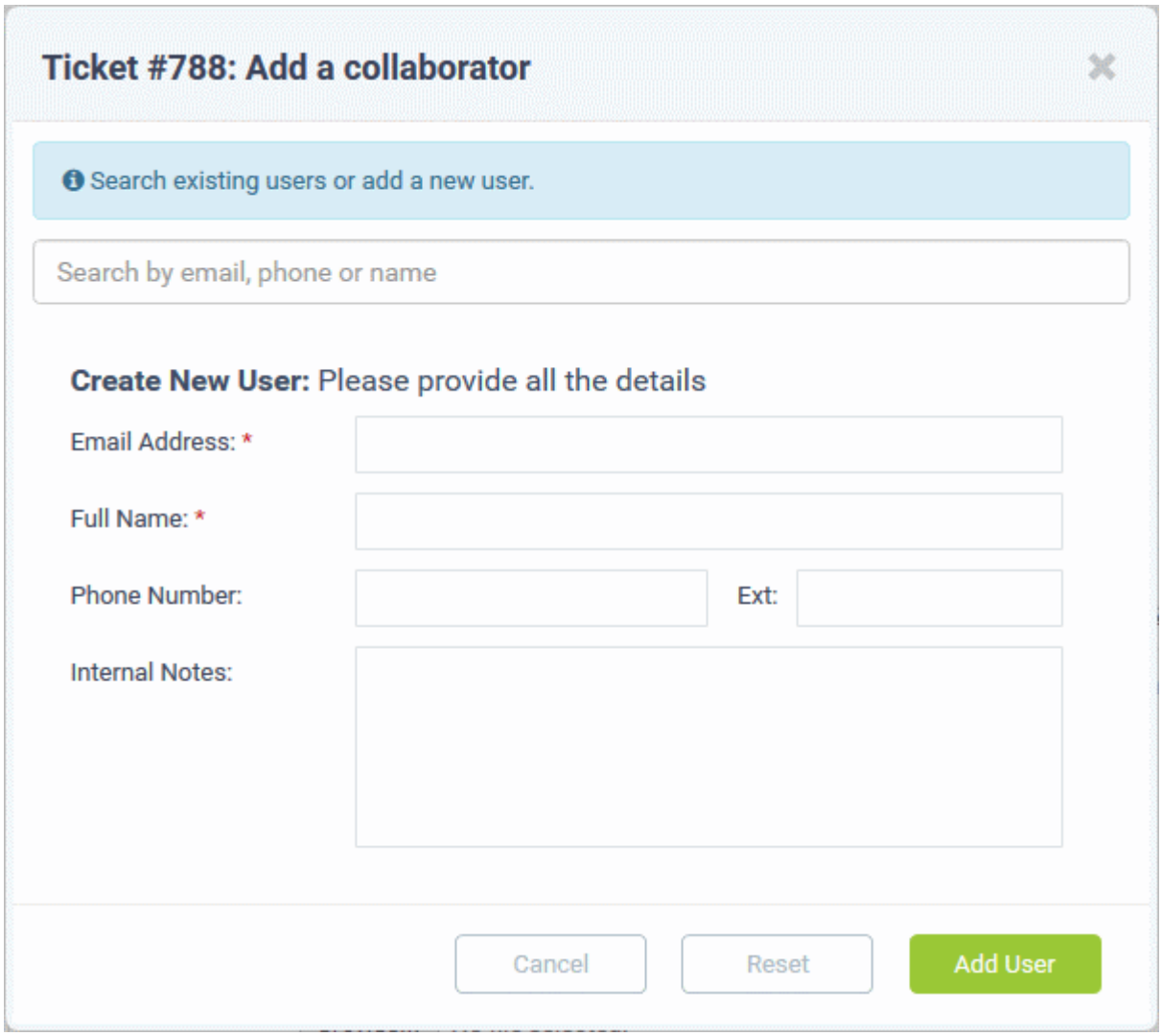
Note: Collaborators can also be configured in an customer's 'Settings' tab:

- Click 'Users' on the left then 'Customers'
- Click the name of the customer to open its details interface
- Click the 'Name' of the customer in the upper panel
- Click the 'Settings' tab and scroll to the 'Automated Collaboration' section
- See **Manage Customer Details** in **Manage Customers** for more details.

    - Click the 'Recipients' link to view and manage the list of collaborators added to the ticket



- To enable or disable a recipient in the list, select/deselect the checkbox at the left of the user name
- To remove a recipient from the list, click the trashcan icon at the right of the user name
- To add a new collaborator to the list for the ticket, click 'Add New Collaborator'



The 'Add a collaborator' dialog allows you to add a user in two ways:

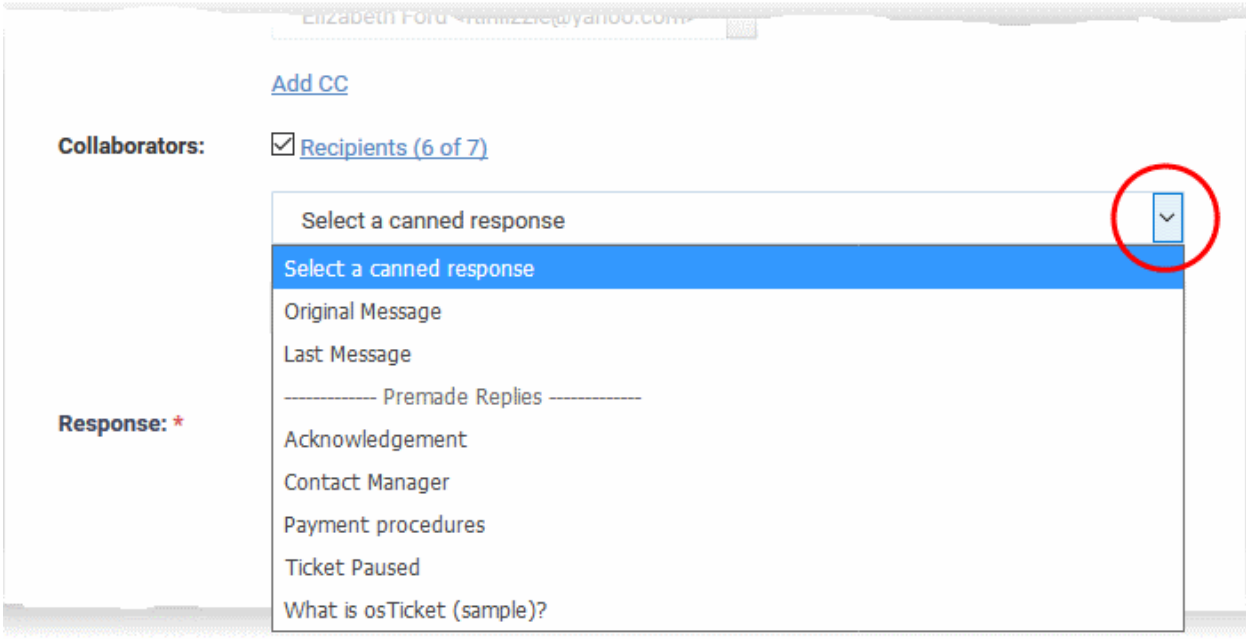
- Enter the name or email ID of a user in the search field. Select the user from the suggestions that appear and click 'Continue'.
- Create a new user by filling the form and click the 'Add User' button.

Tip: If you are adding a new user, he/she will be added as a guest user. You can assign the user to an organization in the 'User Directory' interface:

- You can associate new users with a customer company from the user directory interface ('Staff Panel' > 'Users' > 'User Directory' > Click on their username > Click the link next to 'Customer').
- See '**Add a user to a customer company**' in **Manage Users** more details.

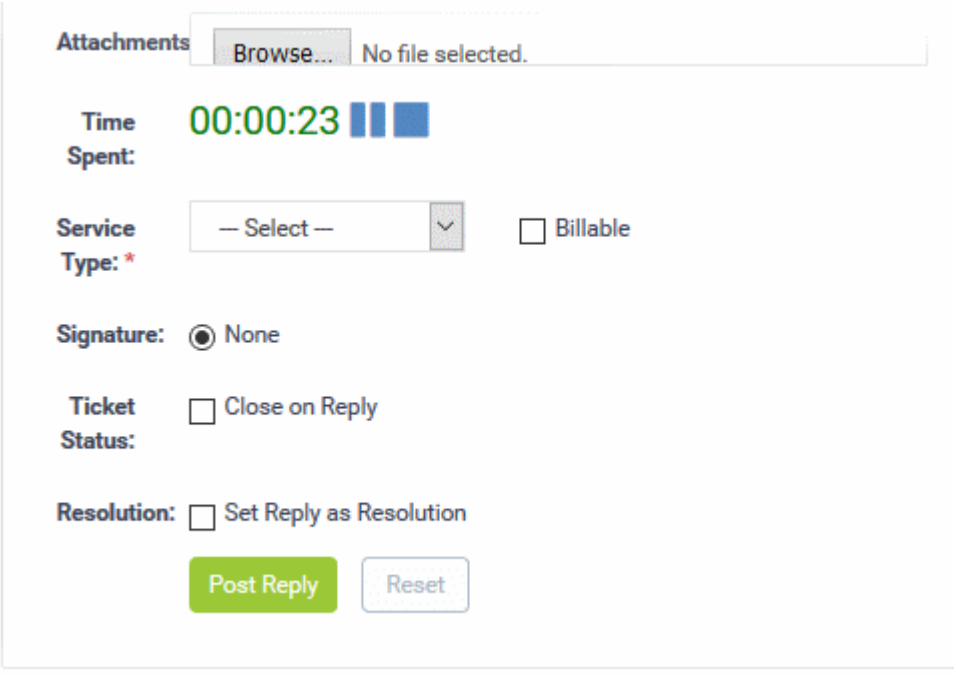
- Repeat the process to add more collaborators
- Click 'Save Changes' in the 'Ticket Collaborators' dialog for your changes to take effect.

- **Response:** You can respond to the ticket by typing a reply in the text editor or by selecting an option from the drop-down.



- **Original Message:** The last message sent by the user.
- **Last Message:** The first message sent by the user.
- **Canned Responses:** Select a canned response to be sent to the user. 'Canned Responses' can be added and edited in the knowledgebase section ('Staff Panel' > 'Knowledgebase' > 'Canned Responses'). See '**Canned Responses**' for more details.
- To clear the response from the editor, click the trash can icon at the top right side.

- **Attachments:** Click the 'Browse' button to add attachments to the response. To remove the attachment, click the file and select 'OK' in the confirmation screen.
- **Time Spent**: The timer shows the time spent on the current service session



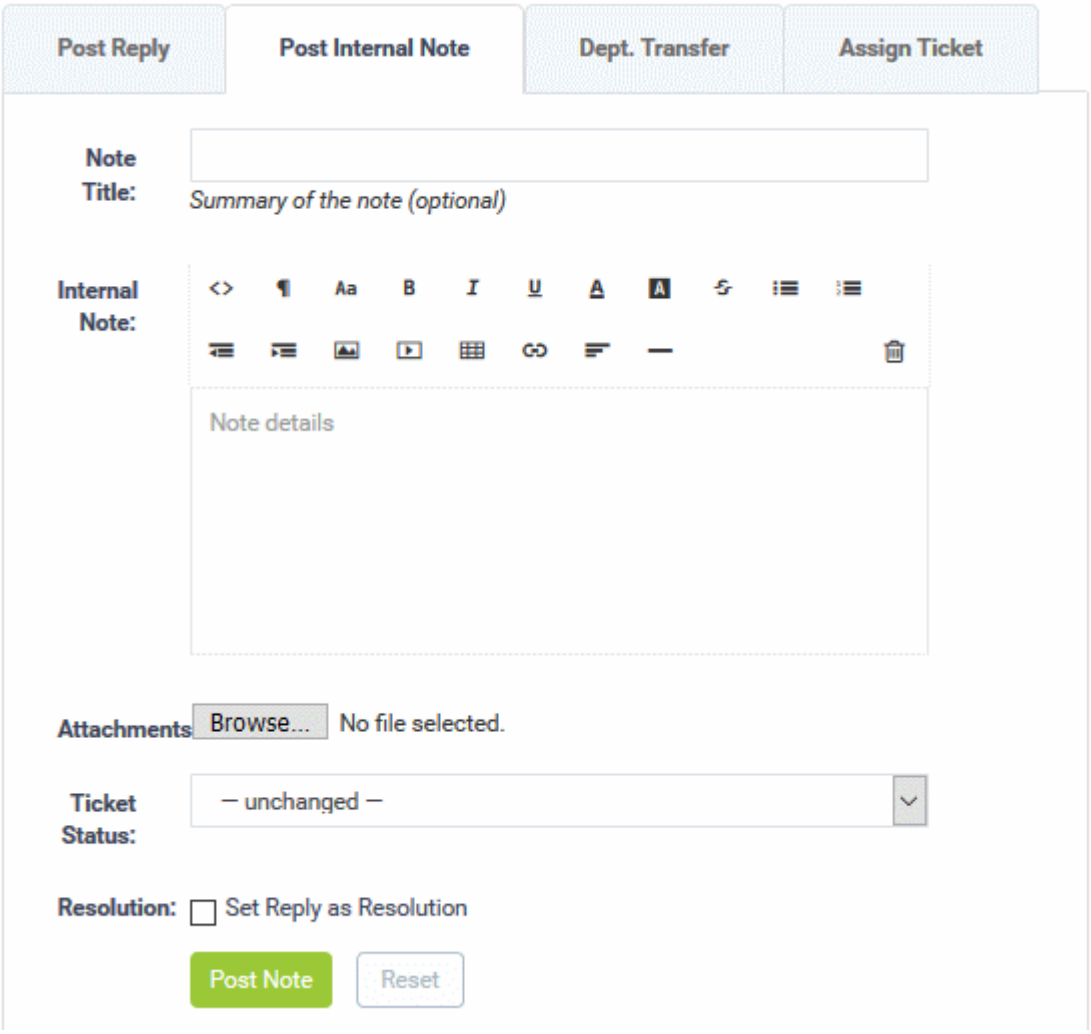
  - To add the time spent on the current session as billable work time, select the 'Billable' checkbox
- **Service Type**: Choose the kind of service offered during the current service session from the drop-down. The charges for the current session will be calculated based on the time spent, asset type mentioned in the

ticket and the service contract associated with the customer company.

- **Signature:**
  - None - Means you can either send with no signature OR type a custom signature in the editor.
  - 'My Signature' and 'Dept. Signature' can be created in the 'Staff Members' and 'Department' areas of the admin panel respectively.
- **Ticket Status:** Select 'Close on reply' if your response will complete all possible work on the ticket. The ticket will be automatically closed when the response is sent to the user.
- Click the 'Post Reply' button to respond to the ticket.
- Click the 'Reset' button to clear the selections and entries.
- **Resolution**: Select 'Set Reply as Resolution', if you want to add the message entered in the 'Response' field as the description of fix/solution for the issue.
  - The resolution field of a ticket indicates its current place in your workflow. It is a communication of ticket progress rather than a definitive ticket status like 'Closed', 'Open' etc. This option means your note will also become the ticket's current resolution status.
  - Example. A resolution status of 'Resolved' means a fix has been implemented and is ready for testing. A ticket status of 'Closed' means the resolution has been verified and no further work is required on the ticket.
- Click the 'Post Reply' button to respond to the ticket.
- Click the 'Reset' button to clear the selections and entries.

To post an internal note

- Click the 'Post Internal Note' tab



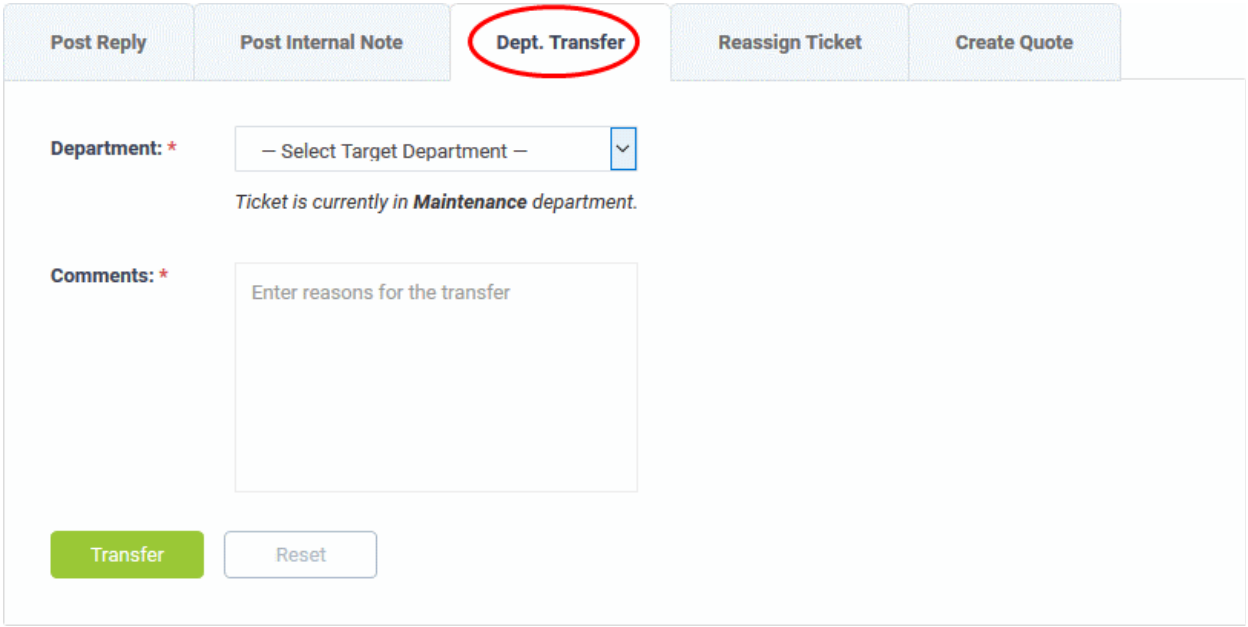
- **Note Title:** Enter a short summary for the note.
- **Note Details**: Enter any comments, notes, reminder or reason for pausing the ticket in the in the text editor
- **Attachments:** Click the 'Choose File' button to add attachments to the note. To remove the attachment, click on the file and select 'OK' at the confirmation screen.
- **Time Spent**: The timer shows the time spent on the current service session
    - To add the time spent on the current session as billable work time, select the 'Billable' checkbox
- **Service Type**: Choose the kind of service offered during the current service session from the drop-down. The charges for the current session will be calculated based on the time spent, asset type mentioned in the ticket and the service contract associated with the customer company.
- **Ticket Status**: To change the status of the ticket, select from the options. The options change depending on the current status of the ticket. For example, for an open ticket, the options are 'Unchanged', 'Close the ticket' and 'Mark As Unanswered'.
- **Resolution**: Select 'Set Reply as Resolution', if you want to add the message entered in the 'Response' field as the description of fix/solution for the issue.
    - The resolution field of a ticket indicates its current place in your workflow. It is a communication of ticket progress rather than a definitive ticket status like 'Closed', 'Open' etc. This option means your note will also become the ticket's current resolution status.
    - Example. A resolution status of 'Resolved' means a fix has been implemented and is ready for testing. A ticket status of 'Closed' means the resolution has been verified and no further work is required on the ticket.
- Click the 'Post Note' button. The note will be saved, the work time will be added to the ticket and the status of the ticket will be changed as chosen from the 'Ticket Status' drop-down.

Change the department

- A ticket will be automatically assigned to a department depending on the help category chosen by the user when creating it.
- You can change the department if required.

To change the department for a ticket

- Click the 'Dept. Transfer' tab in the 'Ticket Actions' pane to assign the ticket to another department. Note - department transfer is not available for 'Paused and 'Overdue' tickets.



- **Department**: Select the department to which you want to reassign the ticket
- **Comments**: Enter any notes or reasons for changing the department.
- Click the 'Transfer' button to assign the ticket to a different department.
- Click the 'Reset' button to clear the selection and comments.

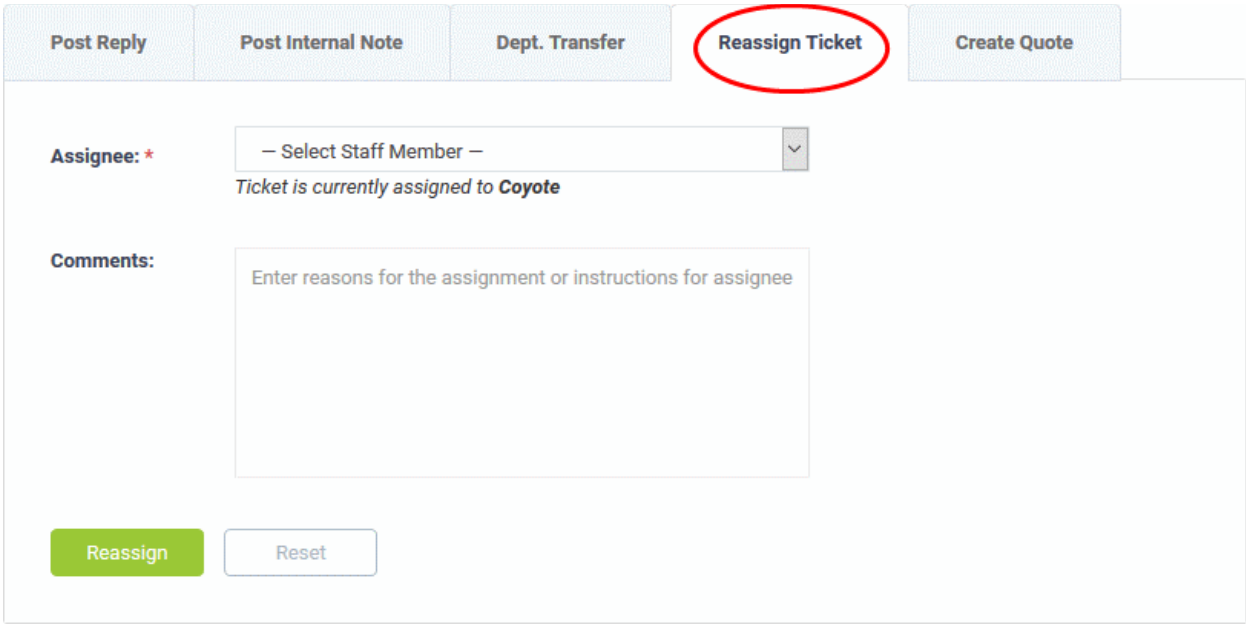
Assign/Reassign a ticket

- Tickets auto-generated by Comodo One modules can be assigned to staff members.
- Tickets that are already assigned to a staff member can be re-assigned to a different staff member.

Tip: You can assign individual or multiple tickets at once without opening the ticket(s). See **Assign Tickets to a Staff Member** in **Manage Tickets** for more details

To assign/reassign a ticket

- Click the 'Assign Ticket' / 'Reassign Ticket' tab in the 'Ticket Actions' pane.



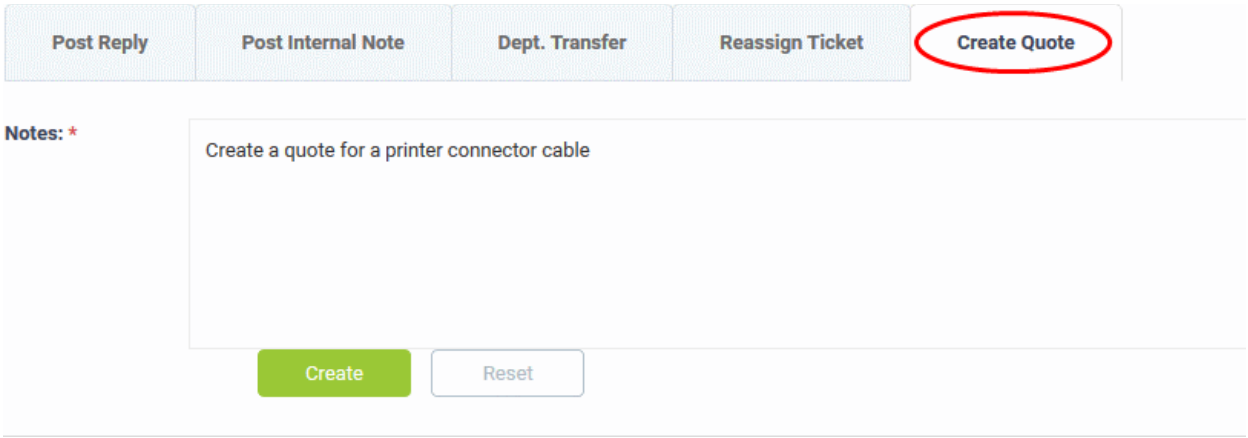
- **Assignee**: Select the staff member to whom you want to reassign/assign the ticket from the drop-down.
- **Comments**: Enter any notes or reason for changing the staff member.
- Click the 'Reassign' / 'Assign' button to assign the ticket to a different staff member.
- Click the 'Reset' button to clear the selection and comments.

Create a quote for products/services

- Comodo Quote Manager (CQM) allows you to generate price quotes for products and services (more details at **https://help.comodo.com/topic-289-1-778-10458-Comodo-Quote-Manager-Module.html**).
- CQM quotes can also be initiated from the Service Desk module. After a quote has been initiated in service desk, a draft quote will be automatically created in Comodo Quote Manager.
- Please note:
    - For using this feature, the department to which the currently logged-in staff belongs, should have been enabled for quote generation by an admin, from the 'Admin panel' > 'Staff' > 'Departments' screen. See the online help page **Departments** of the admin guide for more details.
    - The ticket should be assigned to the logged in staff member.

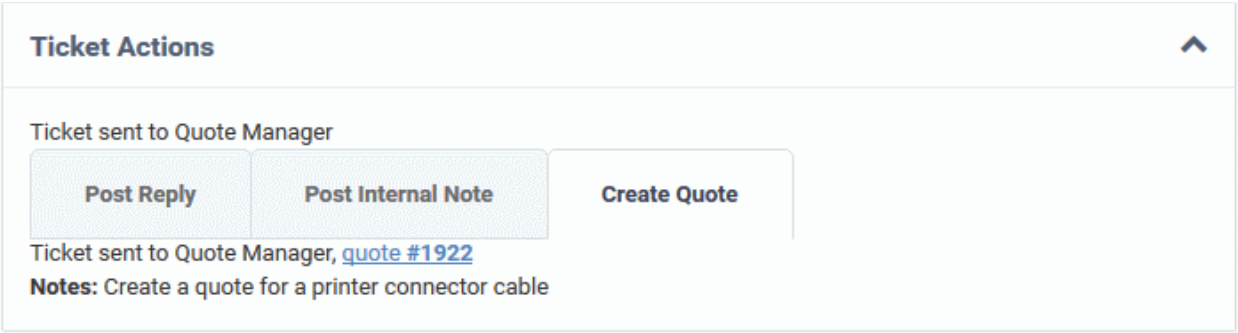
To initiate quotes from Service Desk tickets

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Ensure that the ticket department is enabled to generate quote and the ticket is assigned to you. If not, click 'Claim' to assign the ticket to yourself.
- Click the 'Ticket Actions' stripe to open the 'Ticket Actions' pane, if not already opened.
- Click the 'Create Quote' tab

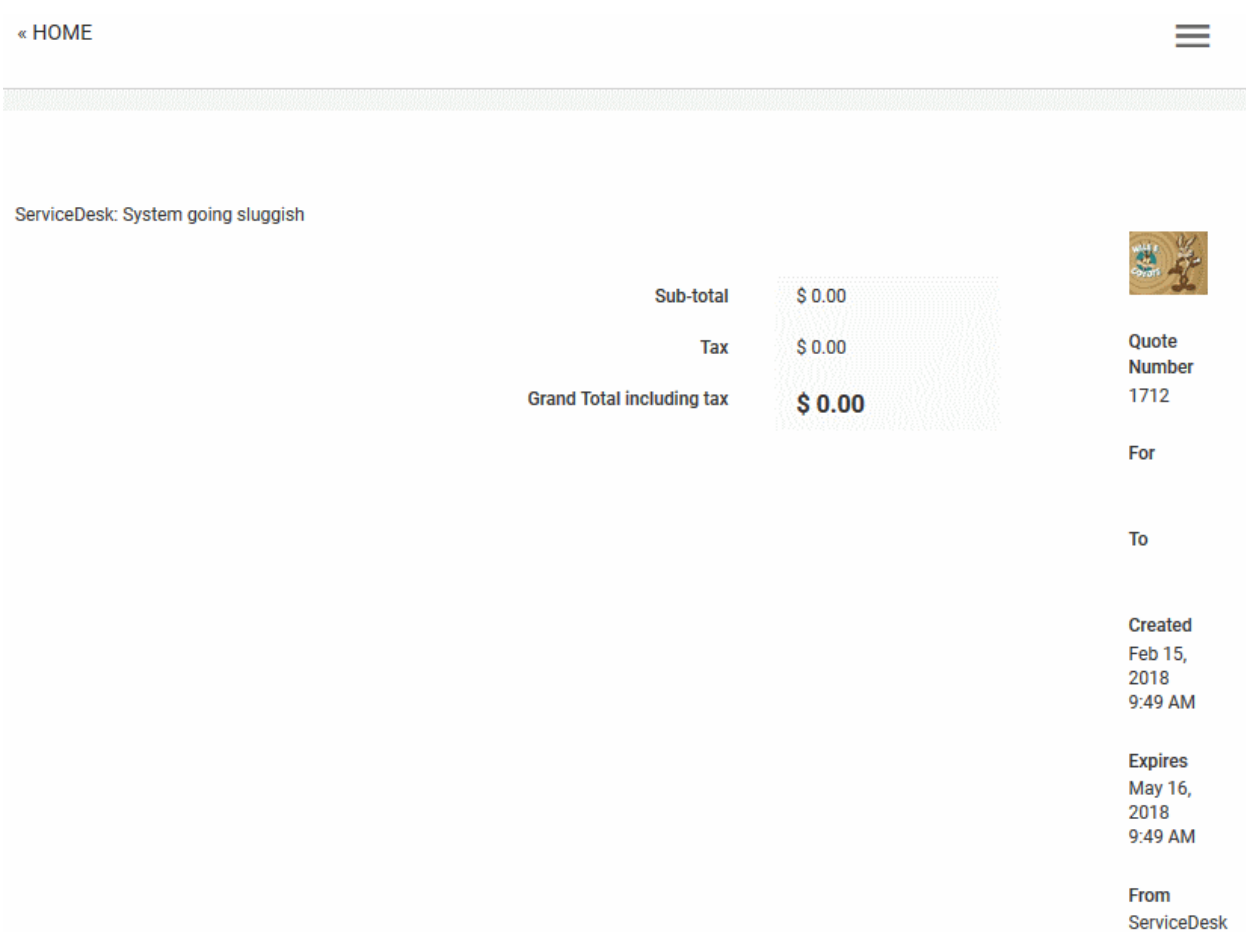


- Enter a message in the 'Notes' field for the staff member attending the Quote Manager console.
- Click 'Create'

A draft quote will be generated in the Quote Manager console:



- Click the 'Quote # NN' link to view the draft quote in the Quote Manager console:



History

The 'Ticket Thread' pane contains a log of all actions taken on the ticket. Actions can be messages from the user, replies from staff, reassignments, addition of materials, status updates and more.

To view the log of actions for a ticket

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'Subject: <summary of the ticket> stripe to open the 'Ticket Thread' pane.

Subject: System going sluggish

Ticket Thread (18)

Sort by: Date

Internal Notes Staff Posts Client Posts

Herald

Fri, Jun 8 2018 12:21 pm

I would suggest to attend this after five in the evening, as I have a meeting.

INTERNAL

Spokes and Wheels

Fri, Jun 8 2018 12:18 pm

To change the fan

Spokes and Wheels

Fri, Jun 8 2018 12:12 pm

TO: <hertriumph@gmail.com>

BSA Mach will take care

INTERNAL

Spokes and Wheels

Fri, Jun 8 2018 12:10 pm

Ticket Assigned to bsamach

Mach, please fix a fan

Spokes and Wheels

Fri, Jun 8 2018 12:06 pm | **Duration:** 2 min(s) 15 sec(s) | **Service Type:** Onsite

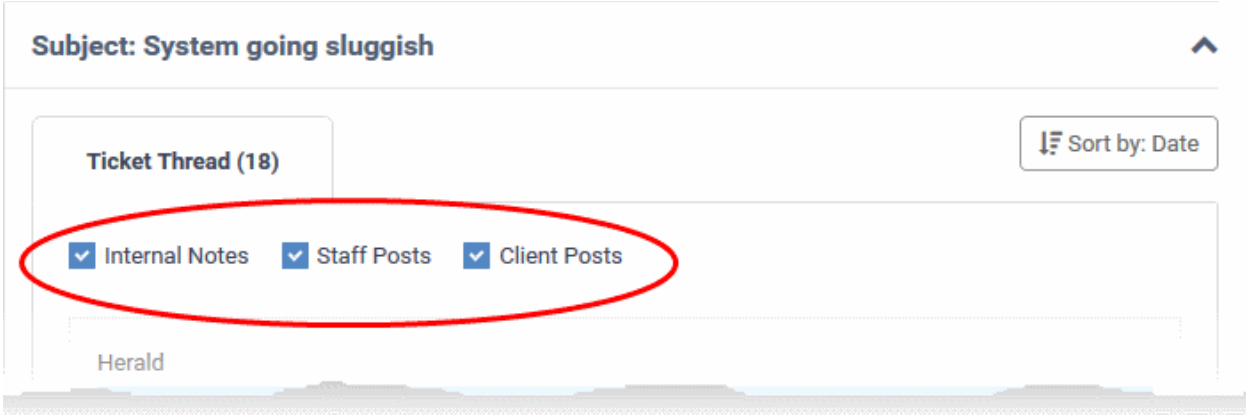
TO: <hertriumph@gmail.com>

Time Entry: 2018-06-08 12:16:00 - 2018-06-08 12:18:22 - 00:02:15 - not billable

We found heating issues. Trying to solve them

Show all threads

- The number beside the 'Ticket Thread' text shows how many actions have been taken on the ticket.
- The 'Ticket Thread' pane contains five actions by default. Click 'Show all threads' at the bottom to view all items.
- The header color of each action lets you easily identify the type of action:
  - Yellow = Internal Notes - system events or internal notes
  - Blue = Staff Posts - responses from end-users
  - Orange = Client Posts - replies from staff to end-users
- Use the check boxes at the top to filter actions by type:



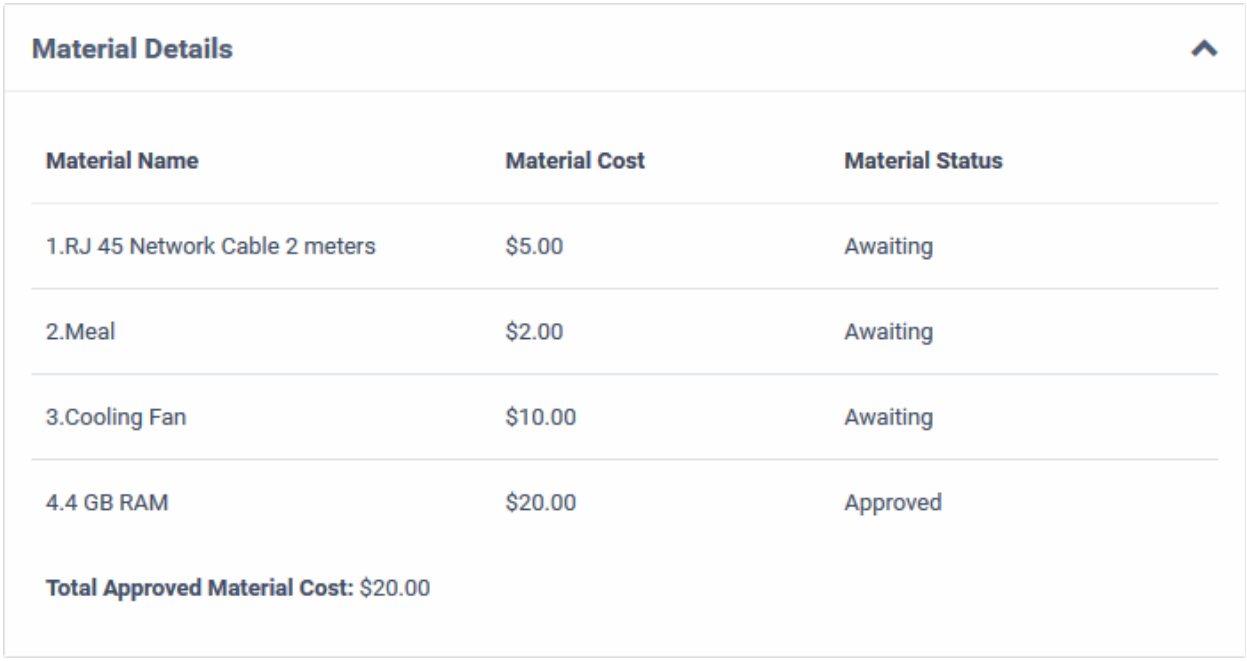
- Click 'Sort by Date' at the top right to sort the entries in ascending or descending chronological order.

Material Details

- The 'Materials Details' pane shows an itemized list of any components used and expenses incurred when fixing the issue.
- Materials are added by staff members and must be approved by an administrator.
- The total cost of approved items is displayed at the bottom.
- If a material/expense item has been rejected then the reason is also displayed under 'Status'.

To view the materials added to a ticket

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'Material Details' stripe to open the 'Material Details' pane.



Material Details

Material Name	Material Cost	Material Status
1.RJ 45 Network Cable 2 meters	$5.00	Awaiting
2.Meal	$2.00	Awaiting
3.Cooling Fan	$10.00	Awaiting
4.4 GB RAM	$20.00	Approved

Total Approved Material Cost: $20.00

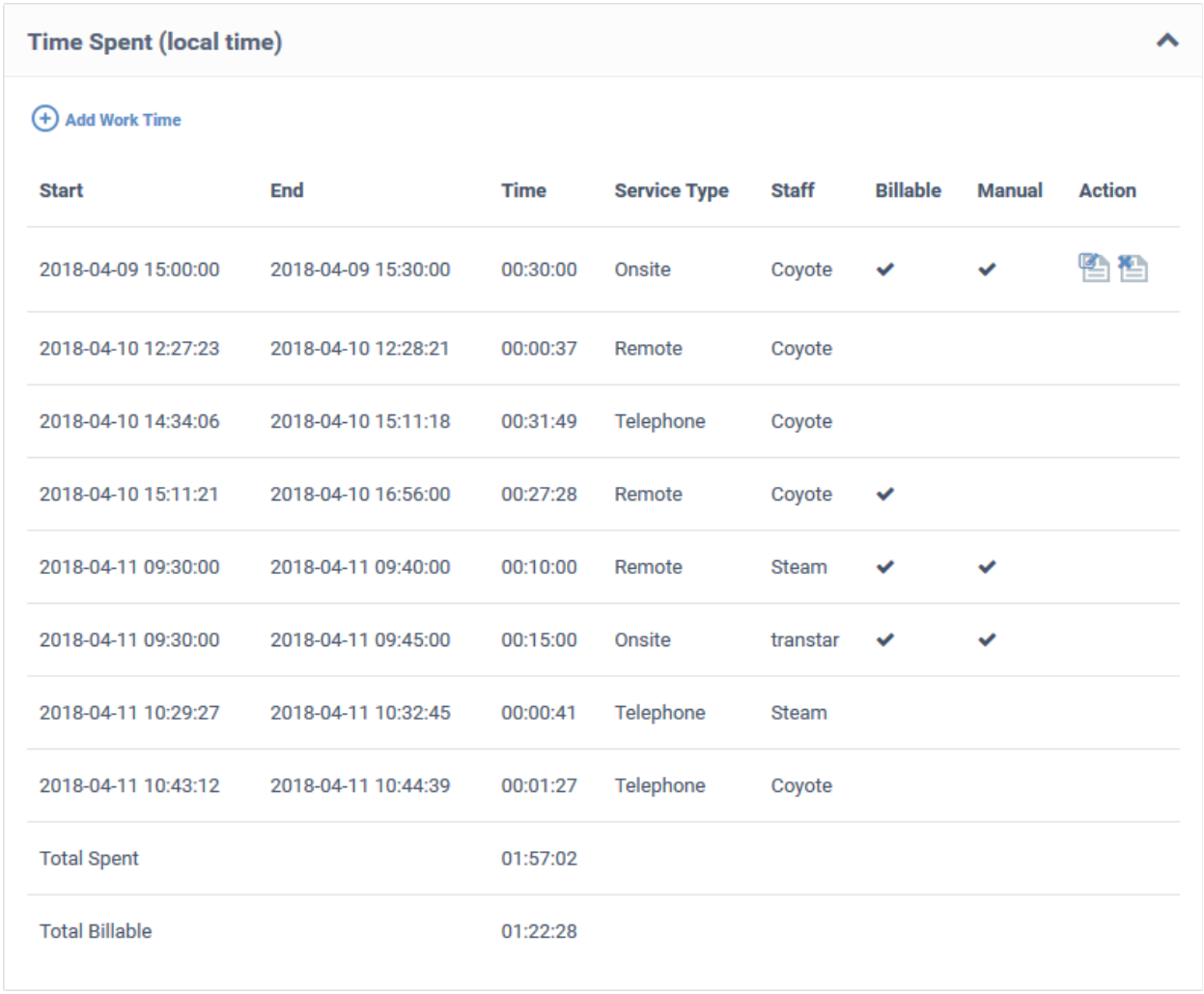
- Staff members can add items and their cost by clicking the 'Add Material' button at the top of the ticket. An administrator must approve the item before its cost is added to the ticket.
- See **Add Materials to the ticket** for more details.

Time Spent

- The 'Time Spent' pane shows the cumulative time expended by all staff on the issue so far. Billable time is shown on a separate row.
- Time spent is automatically recorded when the ticket is open. Staff can also add/edit any 'on-site' time manually.
- Each service session on the ticket is shown as a separate row:

To view and manage time spent on a ticket

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Scroll down and expand the 'Time Spent' stripe



Time Spent - Column Descriptions	
Column Header	**Description**
Start	Date and time the session began
End	Date and time the session finished
Time	Length of the session
Service Type	The kind of service provided during the session. Possible values are: • Onsite • Remote • Telephone
Staff	Name of the staff member who provided the support during the session.
Billable	Whether or not the customer will be charged for the session.
Manual	Whether or not the any time was added manually by staff. For example, to cover time spent during a site visit.
Action	Controls for editing and removing a session: - Edit the time spent

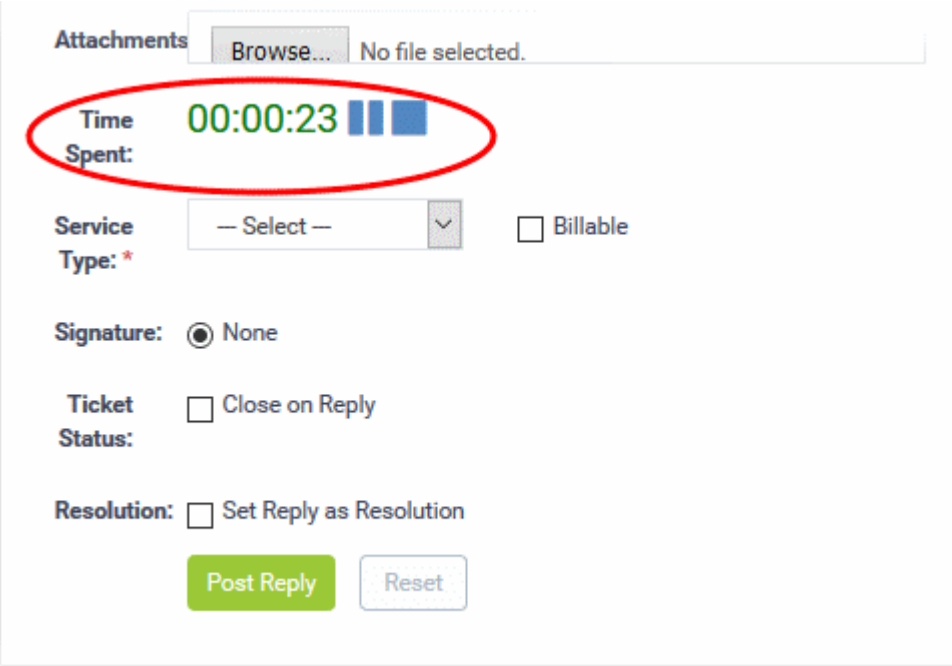
	- Delete the item

Time spent for each support session is added to the ticket in two ways:

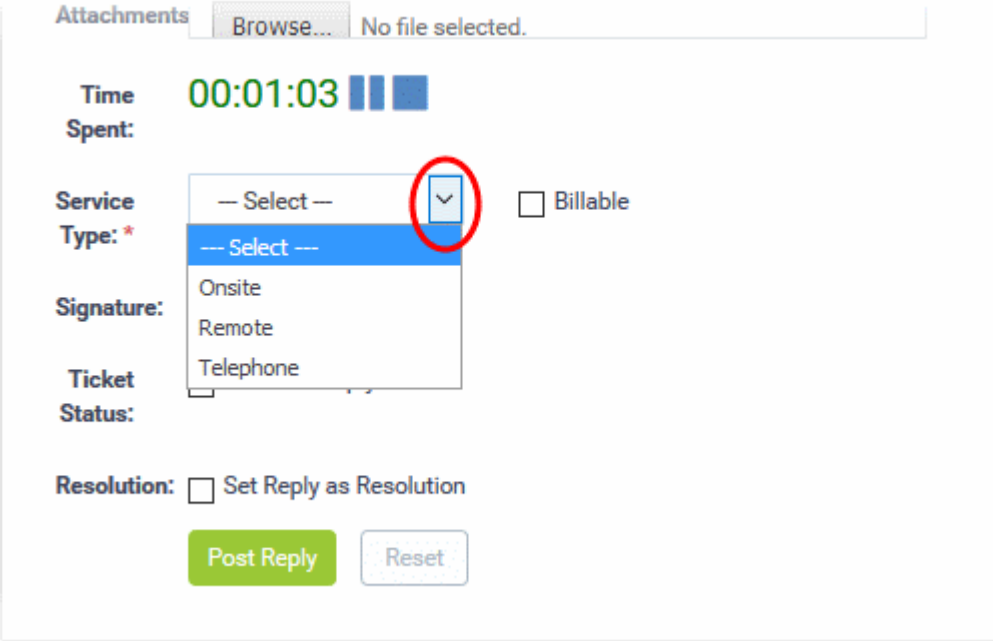
- **'Time-spent' counter**
- **Manual Entry**

The 'Time-Spent' Counter

- The 'Time Spent' counter will automatically start when a staff member opens a ticket assigned to them. The counter is shown in the 'Time Spent' field near the bottom of the page:



- Staff can pause, resume and reset the timer as required.
- After concluding a session, staff can choose the type of service provided and select whether the time is billable. See **Post a reply** and **Post an internal note** for more details.



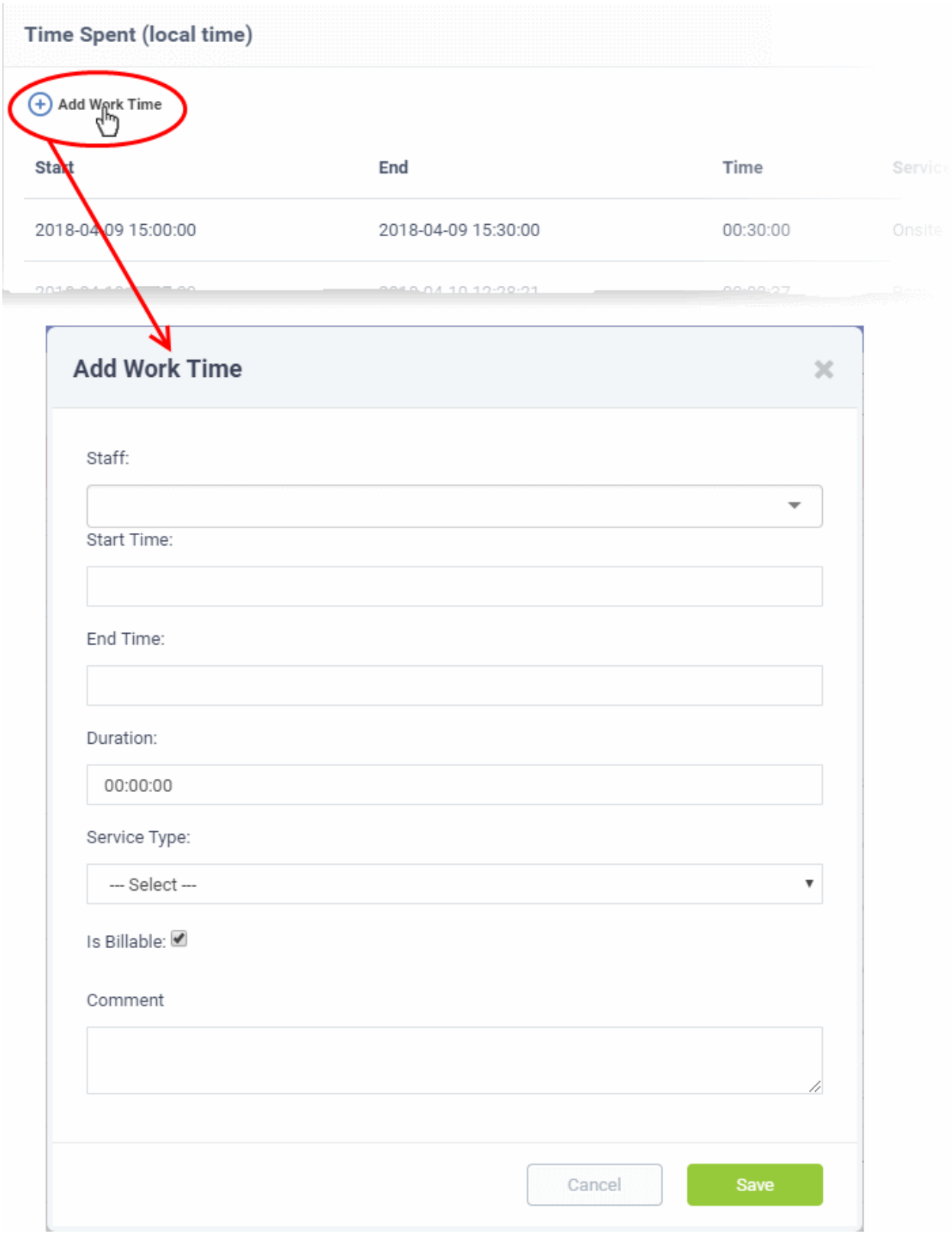
- The time spent will be automatically added to the ticket.

Manual Time Entry

- Staff assigned to the ticket can manually add time for themselves or for other staff members that have been added to the ticket. This is useful for recording time that was not automatically recorded . For example, time spent during an on-premise visit.
- Staff that are not assigned to the ticket can only add time for themselves.
- The option to manually add time must be enabled by an admin in 'Admin Panel' > 'Settings' > 'Tickets' (Under 'Time Settings'). See the online help page **Ticket Settings and Options** in the admin guide if you need help with this.

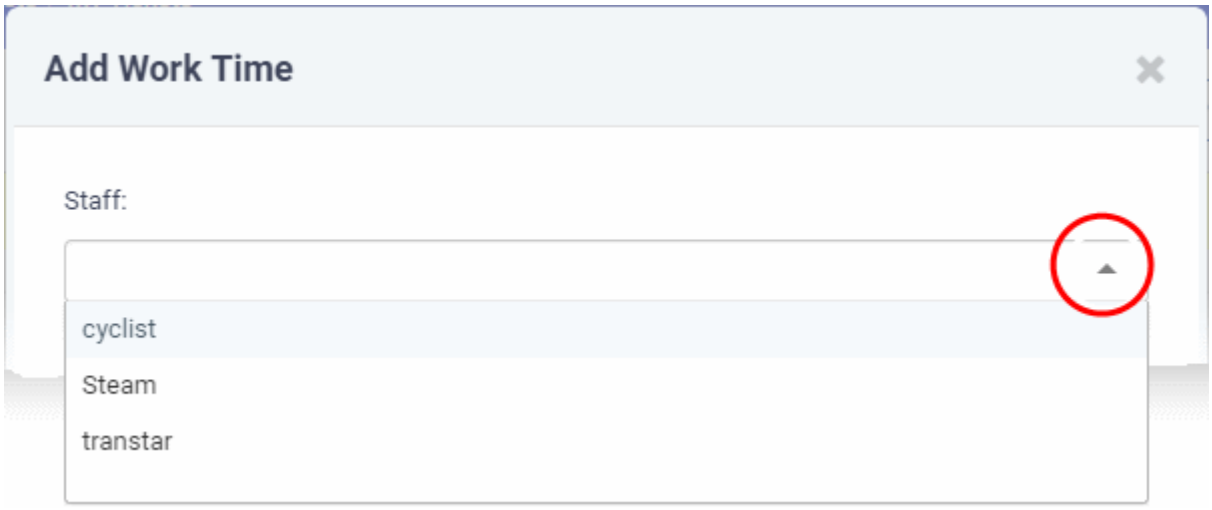
To manually add time to a ticket

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'My Tickets', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'Time Spent' stripe to open the 'Time Spent' pane
- Click the 'Add Work Time' link in the left-corner of the table



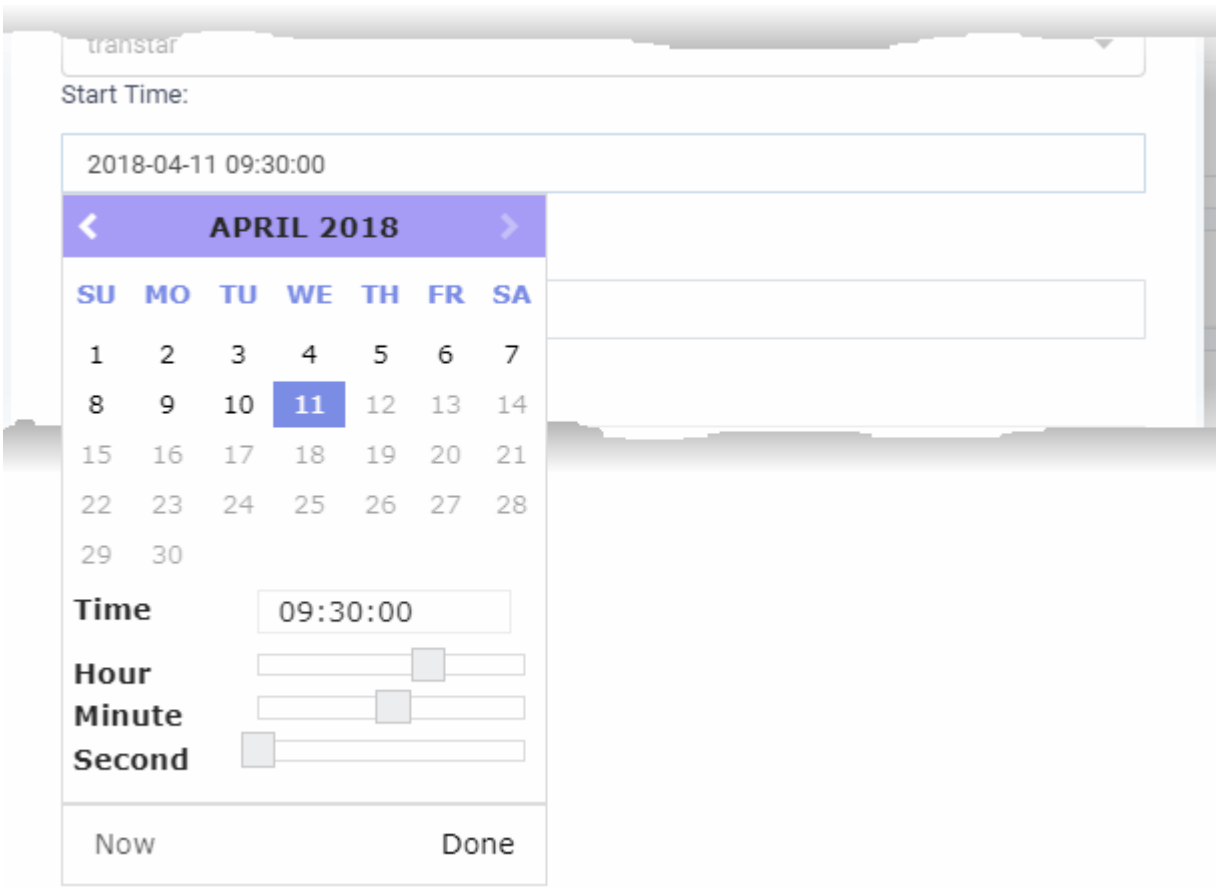
The 'Add work time' dialog will appear:

- Staff - Drop-down shows the admin/staff assigned to the ticket and staff added to the ticket. Select the staff member for whom you want to add time.

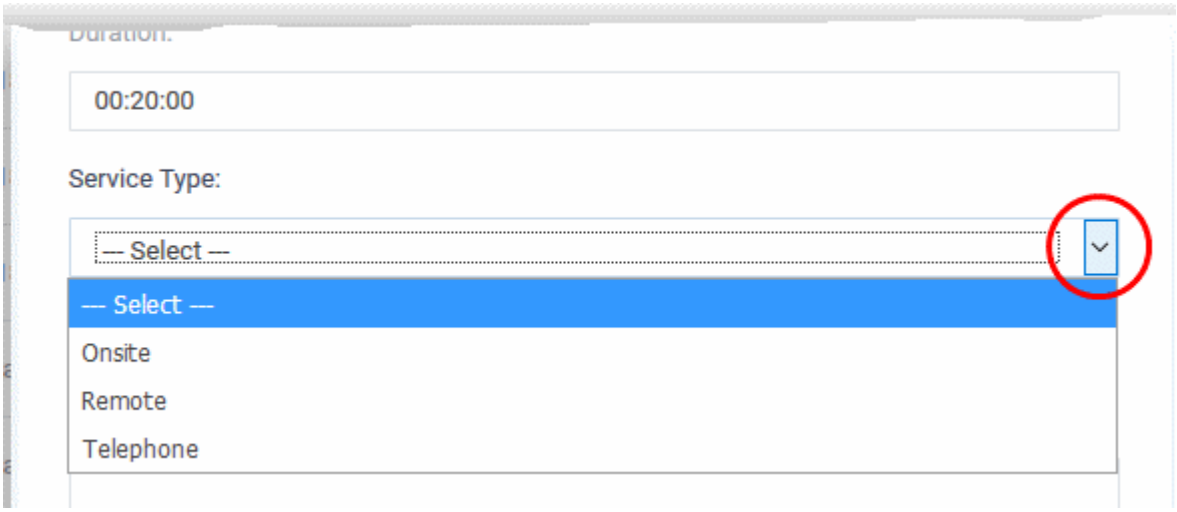


Note: The staff selection drop-down is only available to staff assigned to or added to the ticket. Time added by other staff members will be automatically included under their own name.

- Start Time and End Time - Click inside the 'Start Time' and 'End Time' fields and enter the date/time manually, or select the dates from the calendar. Click 'Now' to use the current date/time as the start or end time.



- Click 'Done' in the calendar after selecting the date and time.
- Duration - This field is auto-calculated as the difference between the start and end times.
- Service Type - Choose the service type offered during the session:



- Specify whether the time is billable by selecting the checkbox
- Enter any comments in the 'Comment' text box. This will be added to ticket activity.

- Click 'Save'.

The time spent will be added to the list.

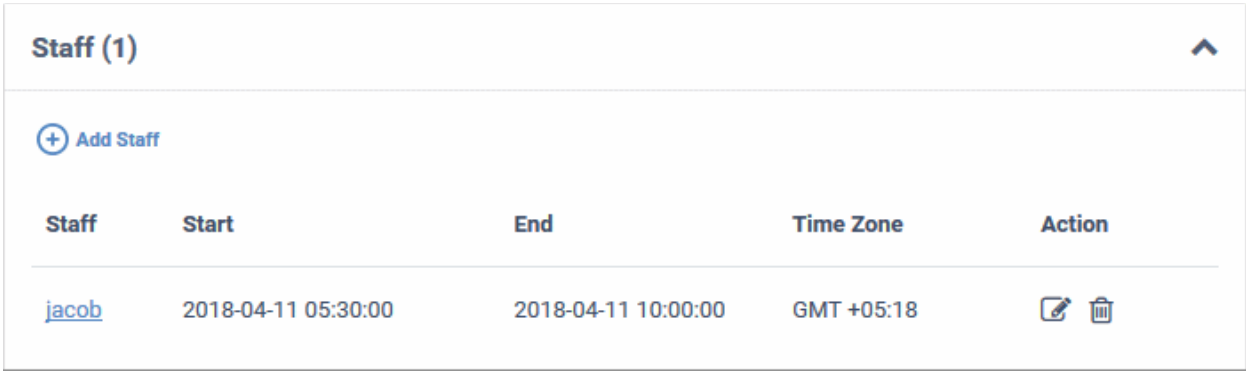
- You can edit or remove the time spent by clicking respective buttons in the 'Action' column.

Staff

- The 'Staff' pane shows agents assigned to the ticket and the time they have spent on it.
- You can also manually add agents that worked on-site and enter their time spent.
- The new agent will be able to access the ticket.
- Once the new agent opens the ticket, their work time will be added to the time spent on the ticket.

To view and manage staff added to a ticket

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Scroll down and click the 'Staff' stripe.

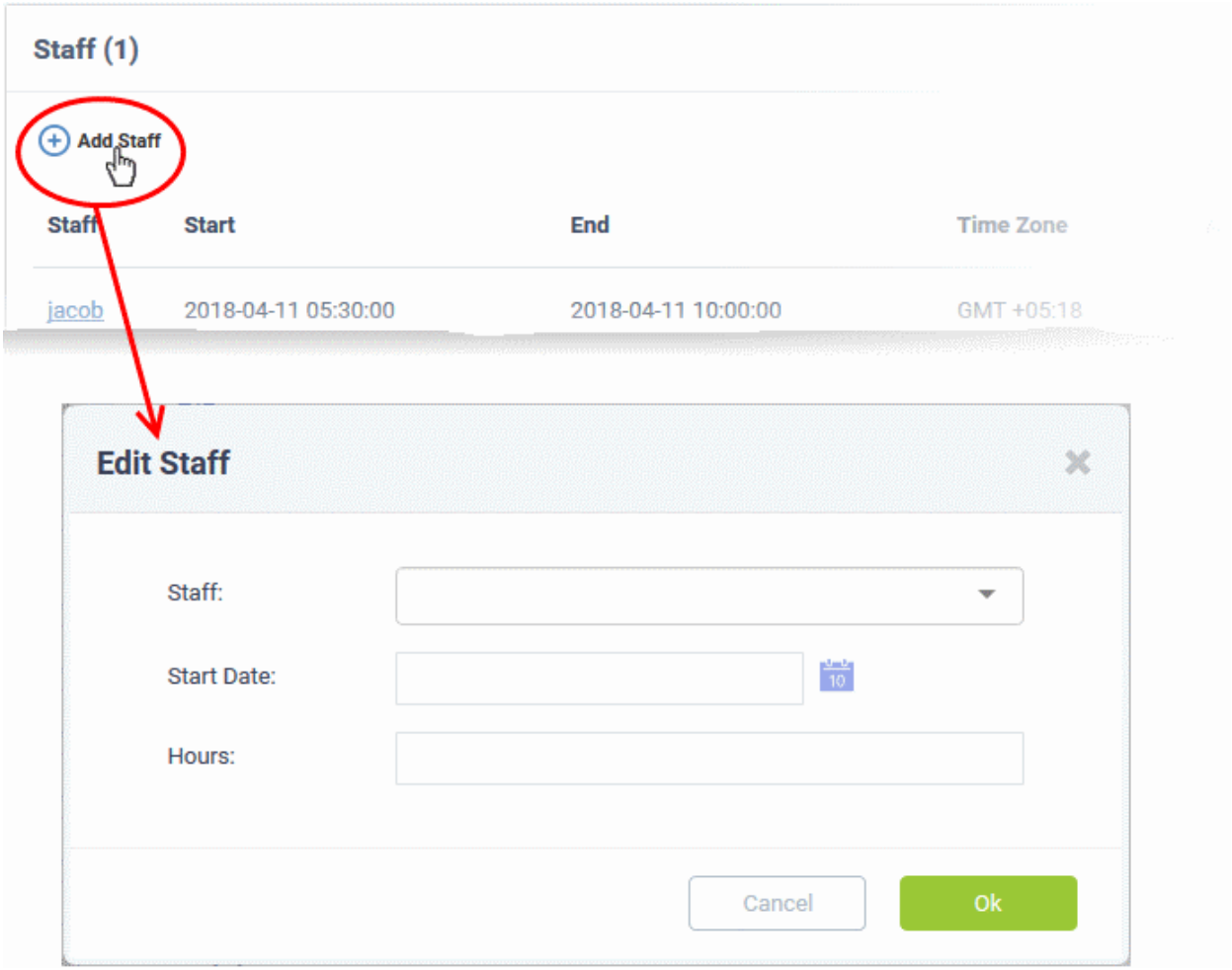


Staff - Column Descriptions	
Column Header	**Description**

Staff	The name of the staff member added to the ticket. • Click the name to edit the member's details
Start	The date and time at which the staff started working on the ticket
End	The date and time at which the staff finished working on the ticket
Time Zone	The time zone followed by the staff
Action	Controls for editing and removing a staff : - Edit the staff - Remove the staff

To add a new staff to the ticket

- Click the 'Add Staff' at the top left of the table



The 'Edit Staff' dialog will appear.

- Choose the staff member from the drop-down
- Start Date: Enter the date and time at which the staff member started working on the issue.
- Hours: Enter the approximate period of time the staff member worked on the issue. This is only a rough indicator which will not be added to the actual time spent on the ticket.

- If required, you can manually add time to the ticket for the staff member **as described here**.
- Click 'OK'

The staff member will be added to the ticket.

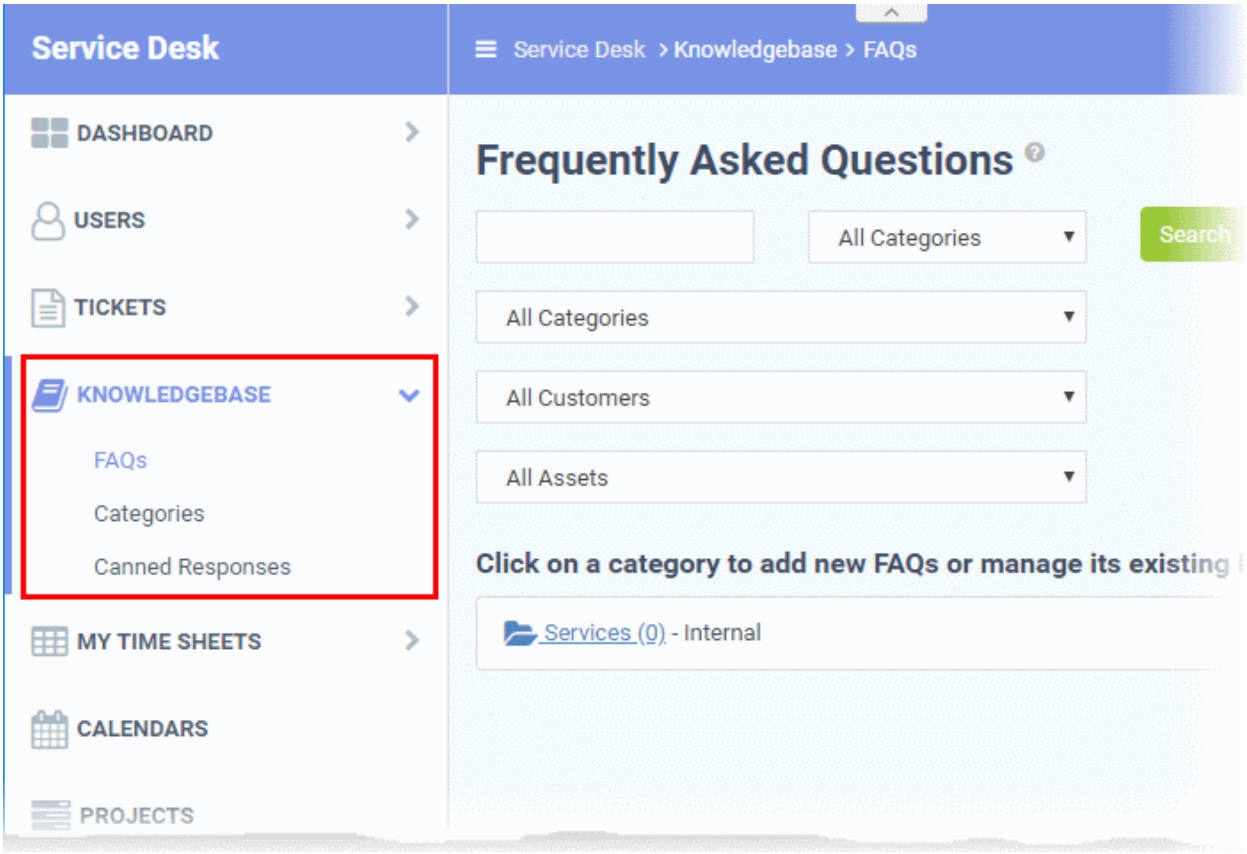
2.4 Manage Knowledgebase

The knowledgebase feature allows staff to create documents which contain solutions to commonly faced problems. These can be used to form a body of reference for users and fellow staff members alike.

- There are two types of FAQ - 'Public' and 'Internal'. While public FAQs are intended for customers/end-users, internal FAQs are intended for staff members and administrators. FAQs are grouped under different categories for easy reference.
- Canned responses are stock replies to common questions which can be quickly inserted into ticket responses by staff.
- The knowledgebase and canned responses can be enabled or disabled by administrators in 'Admin Panel' > 'Settings' > 'Knowledgebase'.

To view, manage and add knowledgebase items:

- Click 'Knowledgebase' on the left



The following sections explain more about:

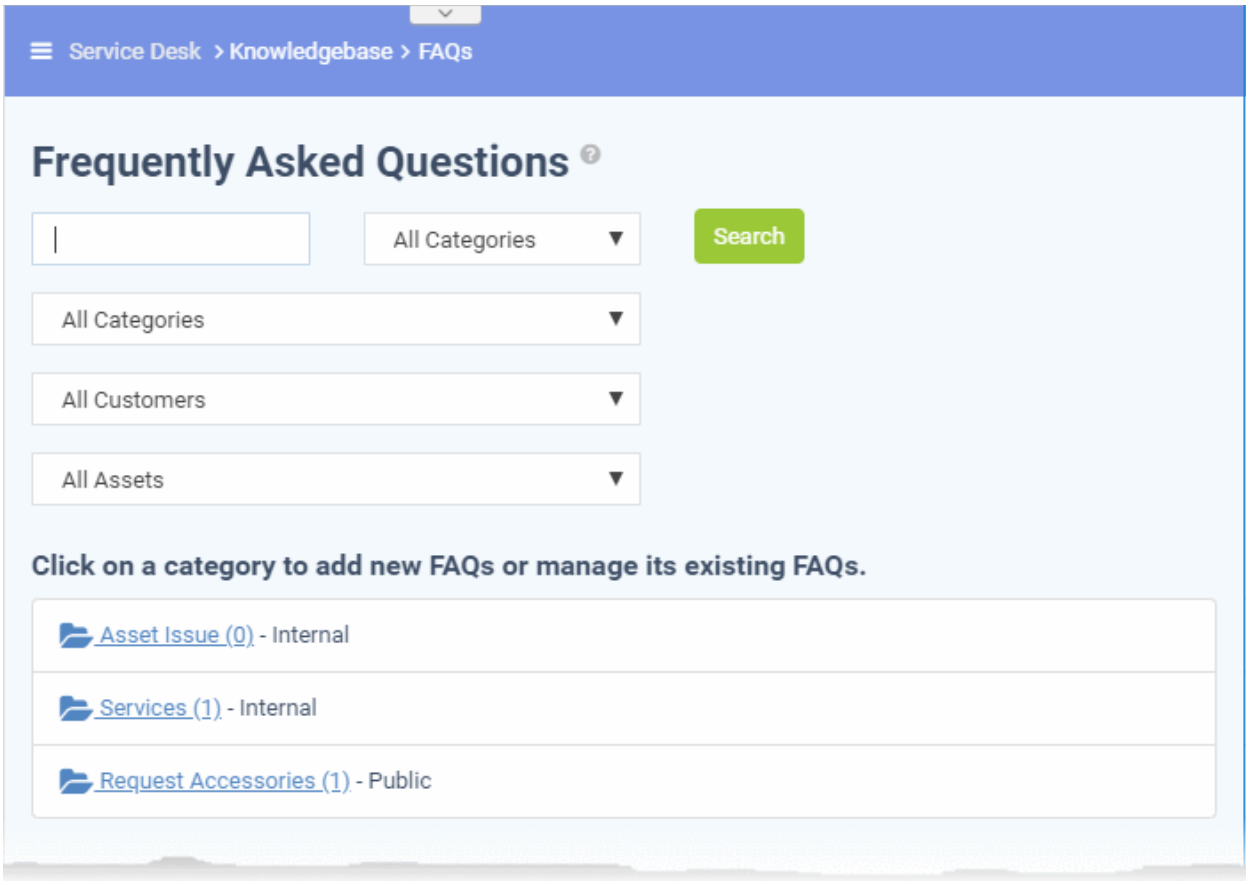
- **Manage FAQs**
- **Manage Categories**
- **Canned Responses**

2.4.1 FAQs

- Click 'Knowledgebase' > 'FAQs' to open the FAQ section.

Staff can post solutions to common issues in the FAQ section of the web-portal. These documents help end-users to find answers without raising a support ticket, allowing staff to prioritize more important issues.

- FAQs are grouped into different categories. New FAQs must be added to an existing category.
- New categories can be created in the 'Categories' section ('Staff Panel' > 'Knowledgebase' > 'Categories'). See '**Manage FAQ Categories**' for more details.
- To edit a ticket, click 'Staff Panel' > 'Knowledgebase' > 'FAQs' > Open an FAQ category > Open a specific FAQ > Click 'Edit FAQ'
  - You can edit an FAQ's content, change the FAQ's title and change the category to which it belongs.
  - You can add links to relevant ticket categories.
  - You can choose to keep FAQs internal (so they can be viewed by only by staff members) or make them public (so they can be viewed by users in the web portal under the 'Knowledgebase' tab).
- You can add tickets to FAQs. The questions and responses in the ticket thread will be shown in the FAQ.
- You can publish, unpublish or delete an FAQ by using the 'Options' drop-down at the bottom of the view ticket interface.
- To open the FAQ screen, click 'Knowledgebase' > 'FAQs'



Filter Options

The upper part of the FAQ screen allows you to filter and search for FAQs:

- Filters let you search for specific FAQs and/or narrow results by category, customer or asset.
- Clear any filters and click 'Search' again to view the full list. Alternatively, click the 'FAQs' link on the left.

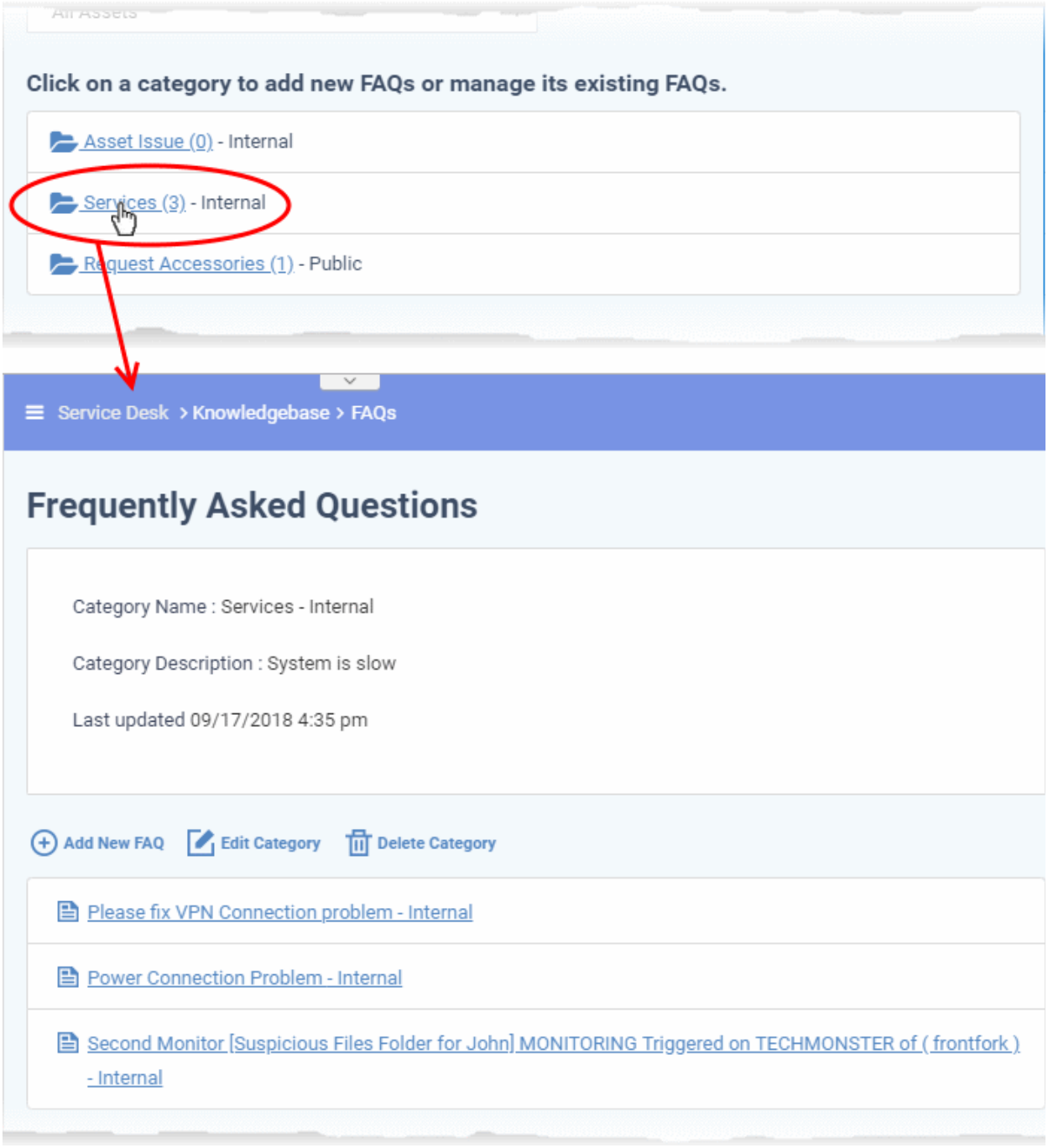
The lower part of the screen displays all existing FAQ categories. The numbers in parentheses indicate how many FAQs are in the category. Please see the following links for more details:

- **View a FAQ**
- **Add a FAQ to a category**

- **Edit a FAQ**
- **Publish / Unpublish a FAQ**
- **Remove_FAQ**

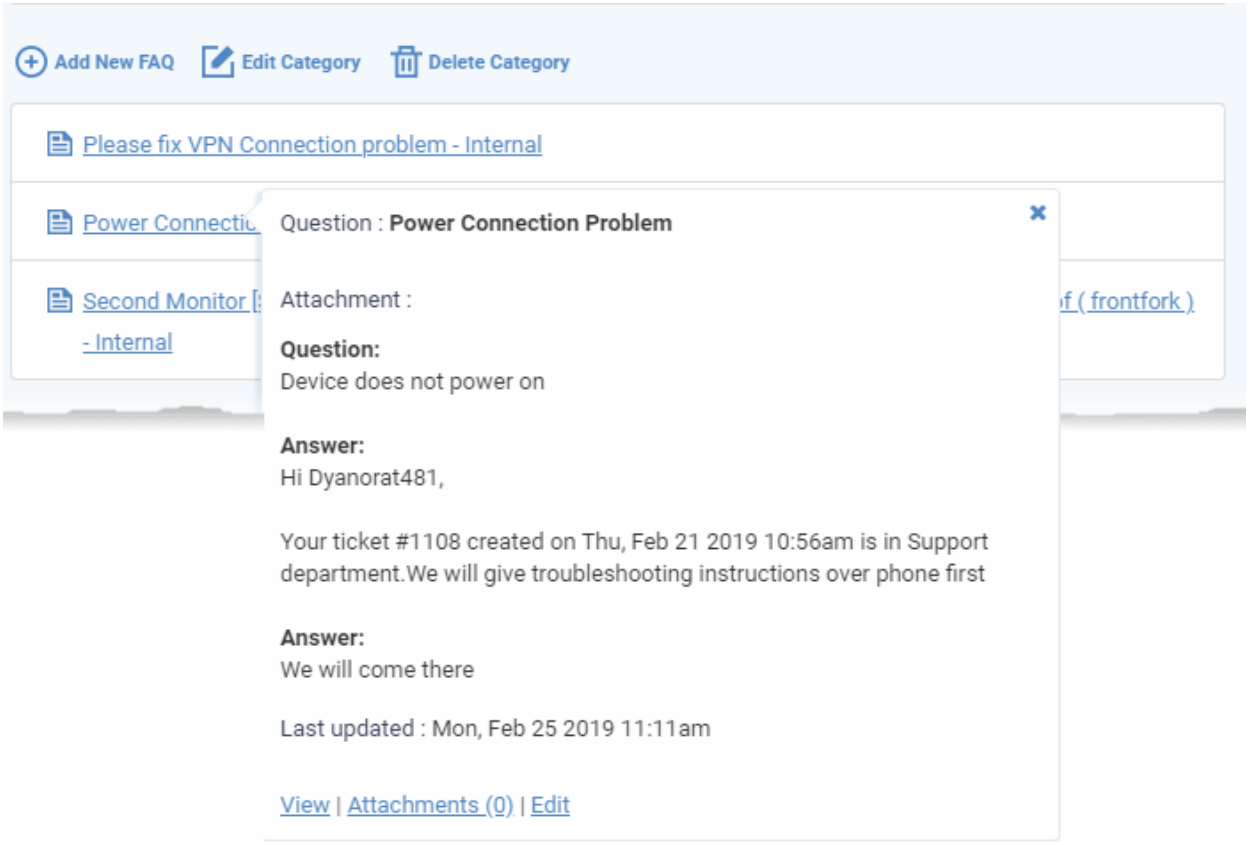
To view an FAQ

- Click 'Knowledgebase' > 'FAQs'
- Click a category



All FAQs in the category are shown.

- Click an FAQ to see it in full and to view further options
- Hover your mouse over an FAQ to view a summary of the ticket:



- Click the 'View' link to view the full FAQ page
- Click the 'Attachments' link to view supporting documents and images added to the FAQ
- Click the 'Edit' link to modify FAQ content, change FAQ category, add attachments and specify related ticket category.

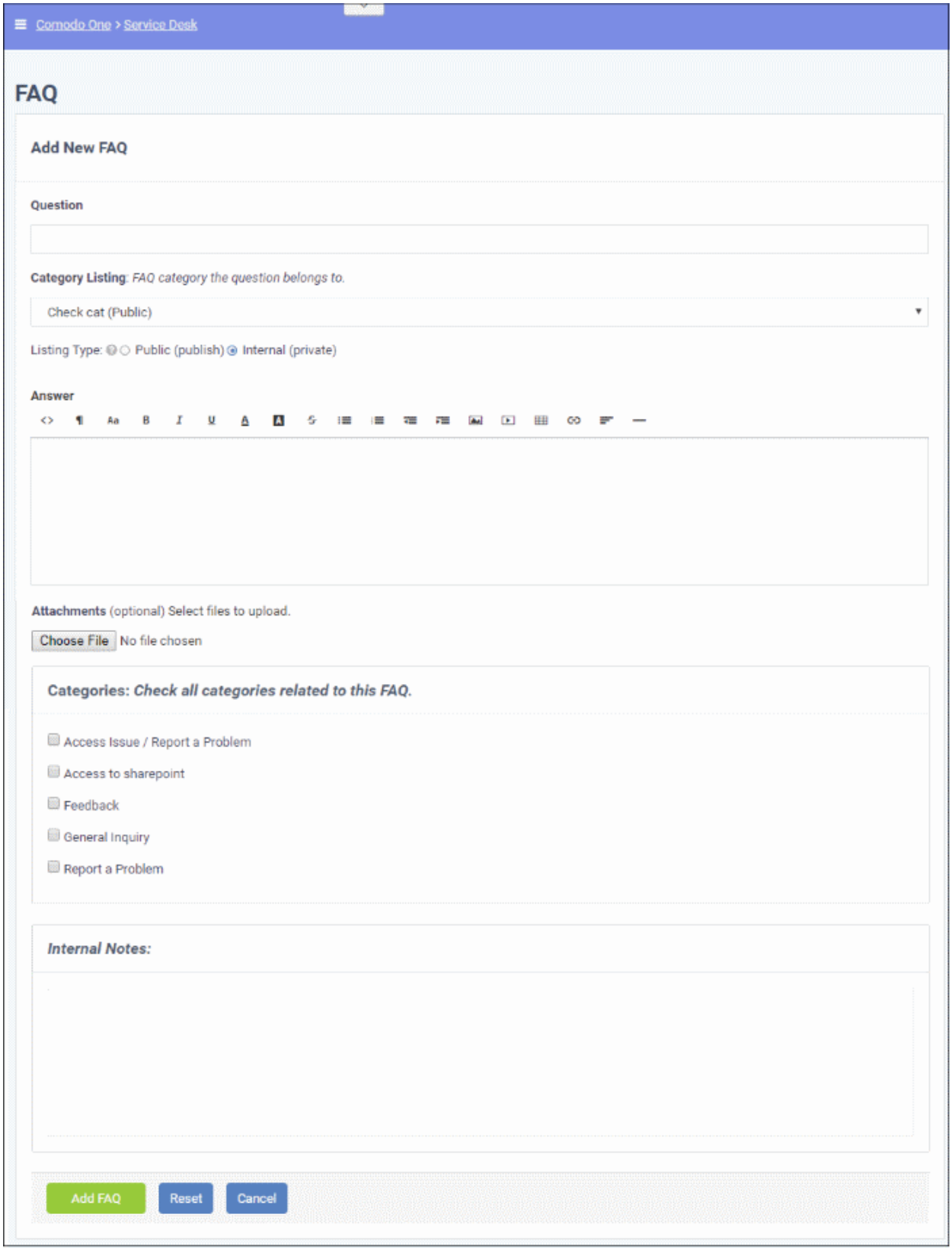
To add an FAQ to a category

- Click the name of the category to which you want add a FAQ.

All FAQs in the category will be displayed. You can edit or delete category from this screen also. See '**Manage FAQ Categories**' for more details.

- Click 'Add New FAQ'

The 'Add New FAQ' screen will be displayed.



FAQ Information

- **Question:** Enter the query label. For example, 'How do I change my account password?'.
- **Category Listing:** Select the FAQ type under which the FAQ should be listed.
- **Listing Type:** Select whether you want to make the FAQ to be visible to end-users or only to staff members. If you choose 'Public', then the users can view the FAQ in the web portal.

Answer

- Enter the solution for the question in the text field.

Attachments

- Click 'Choose File' to add attachments to the FAQ. Attachments you add here will be available for download from the FAQ.

Ticket Category

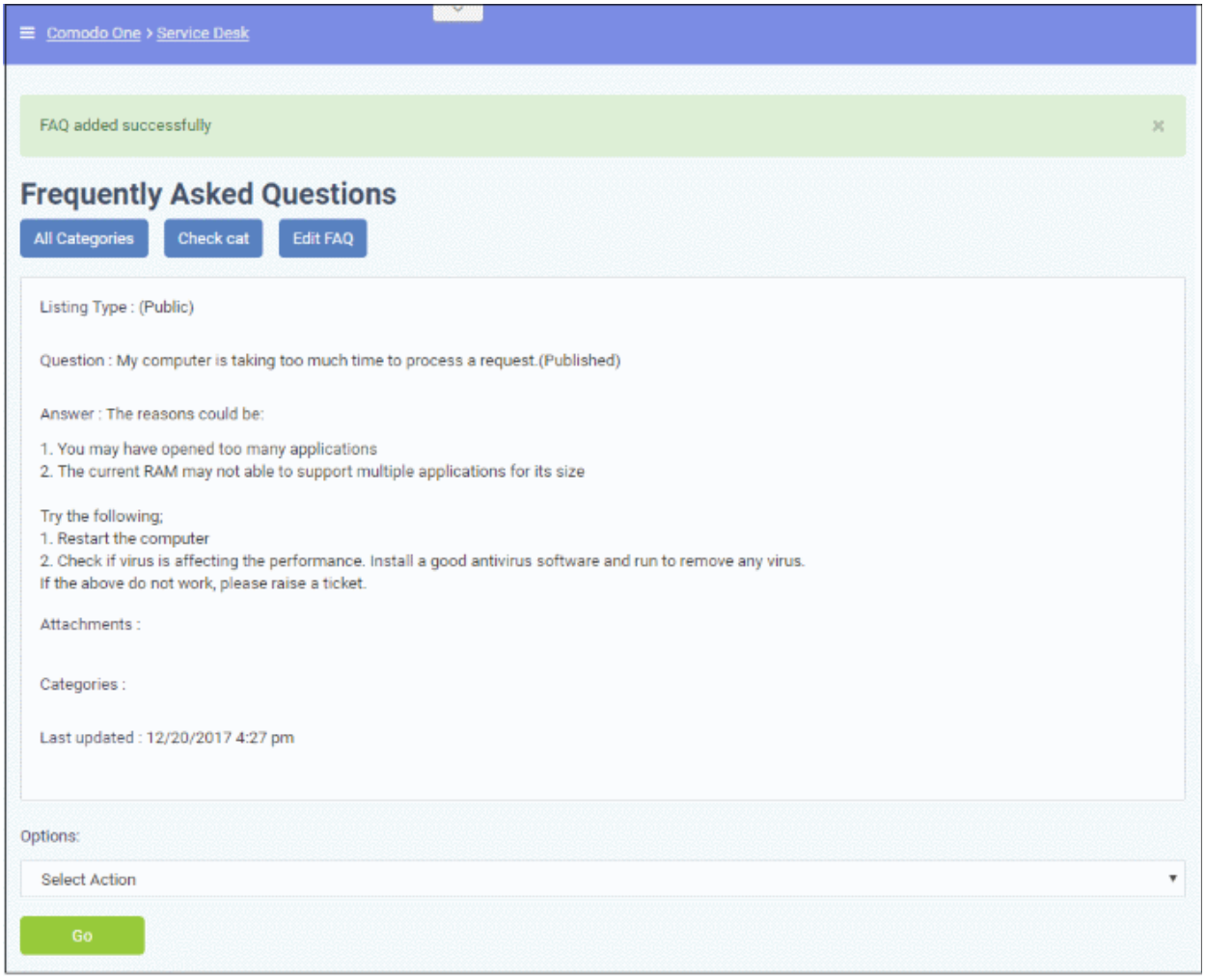
- Select ticket categories that should be listed as 'related' in the FAQ. This will also help users to locate the FAQ if they search by ticket category in the web portal.

Internal Notes

- Add notes for the FAQ that are for internal purpose only.

Click the 'Add FAQ' button at the bottom.

The 'FAQ successfully added' screen will be displayed.



From the screen you can also edit, publish, unpublish or delete the FAQ using the 'Options' drop-down.

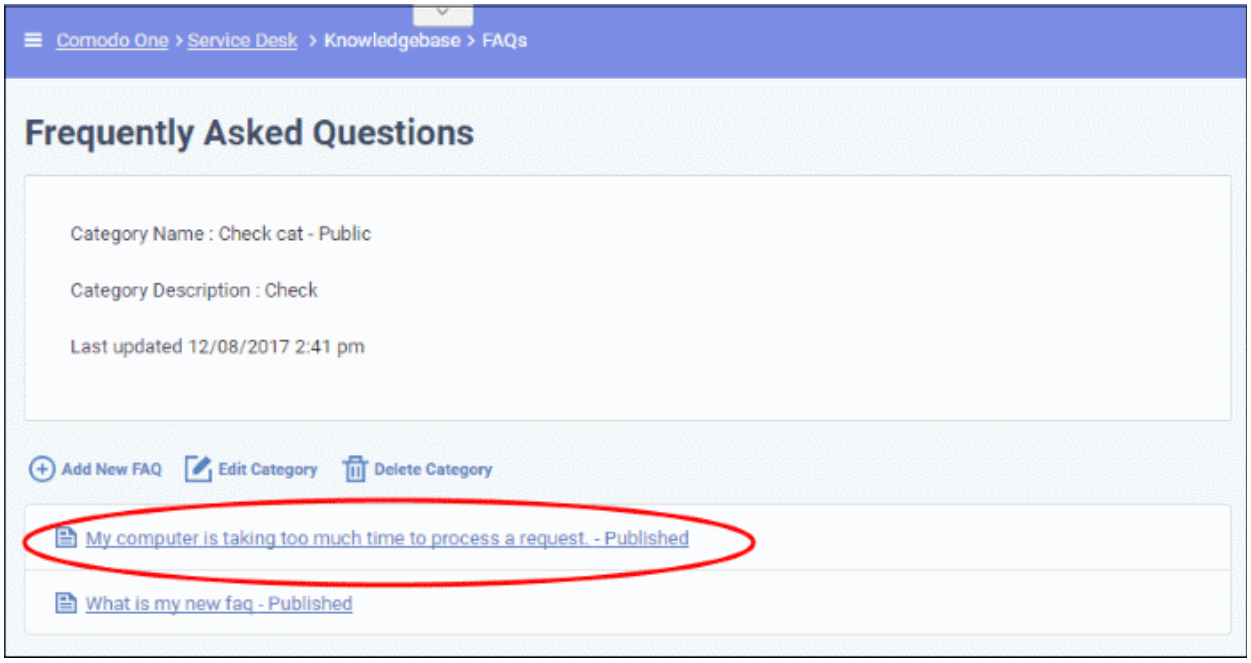
Edit an FAQ

FAQs can be edited to update answers, change ticket categories, add/remove internal notes and more. This is useful to add answers for FAQs that are generated from tickets.

Edit an FAQ

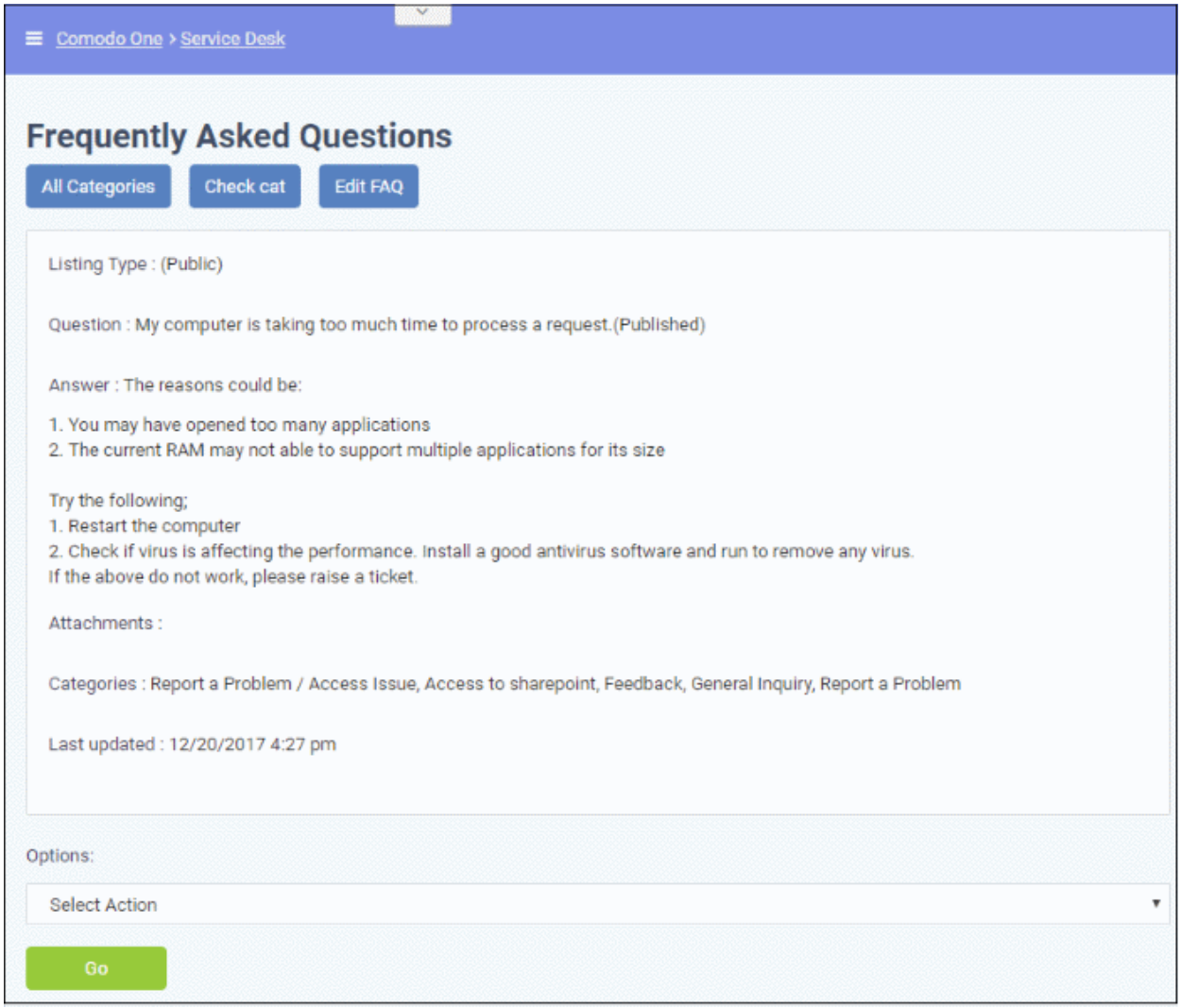
- Click 'Knowledgebase' on the left then 'FAQs'
- Click the category in which the 'FAQ' that you want to edit is placed.

The list of FAQs in the category will be displayed.

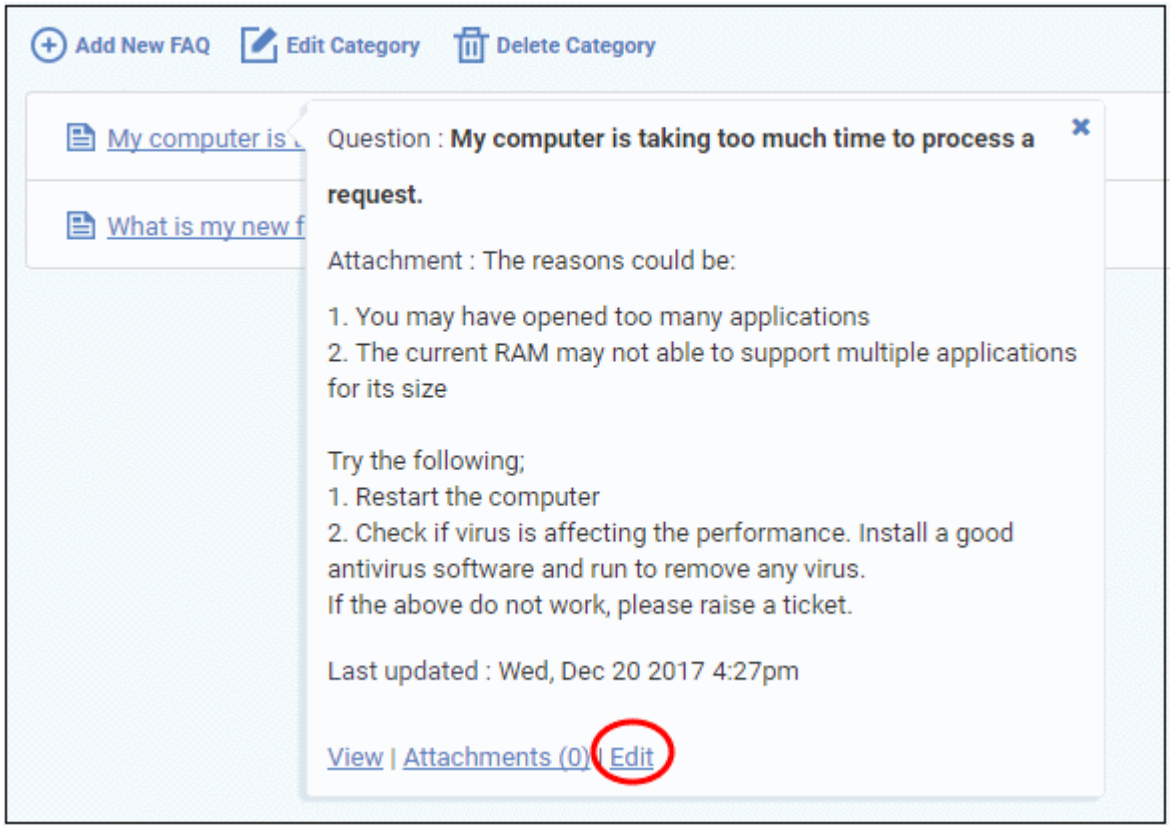


- Click on the FAQ that you want to edit.

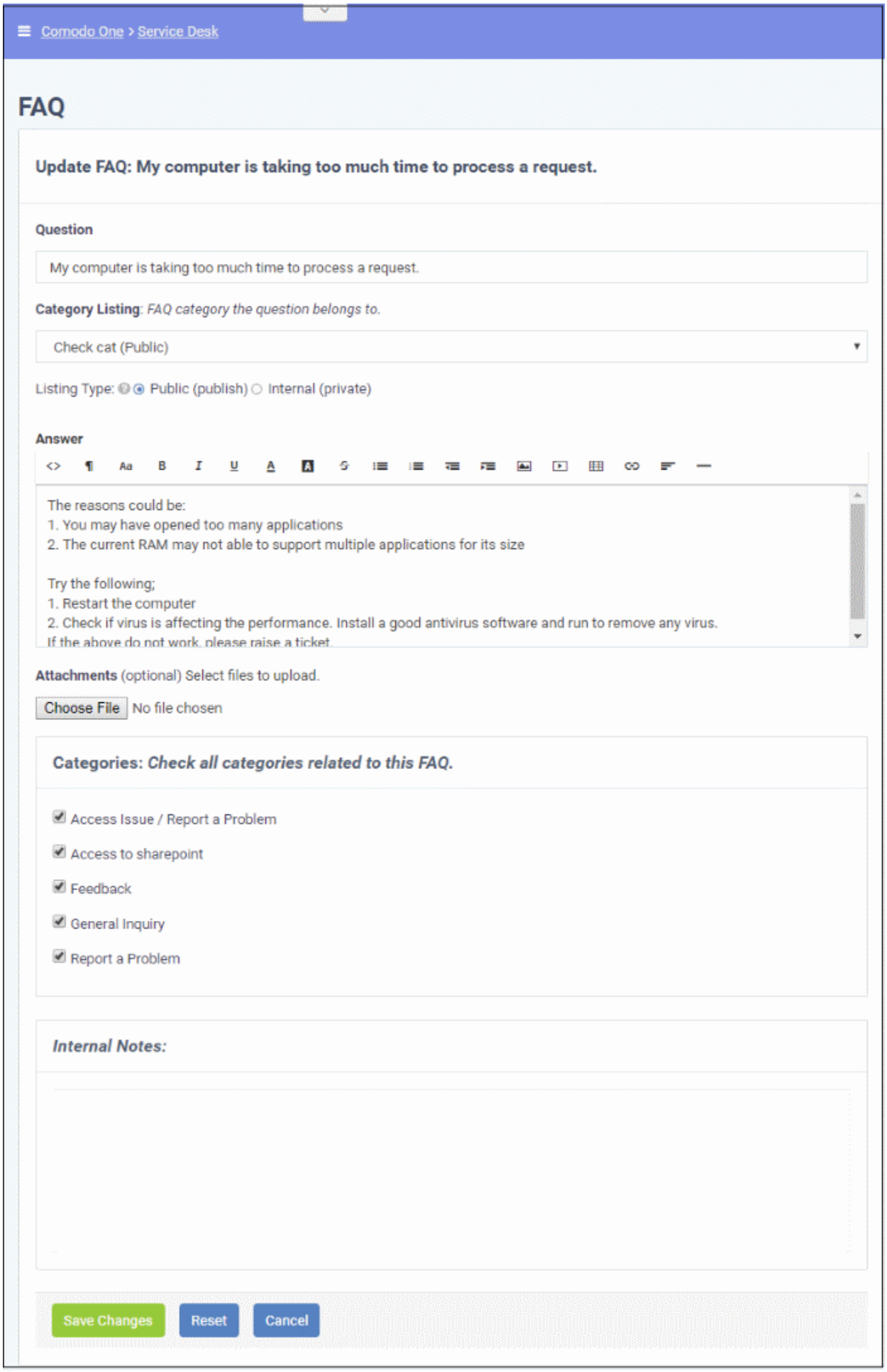
The 'FAQ' details screen will be displayed.



- Click the 'Edit FAQ' button at the top
- Alternatively, place the mouse cursor on the 'FAQ' name and click the 'Edit' link from the tool-tip.



The 'Update FAQ' screen will be displayed.


Comodo One > Service Desk
FAQ
Update FAQ: My computer is taking too much time to process a request.
Question
My computer is taking too much time to process a request.
Category Listing: FAQ category the question belongs to.
Check cat (Public)
Listing Type: Public (publish) Internal (private)
Answer
The reasons could be:
1. You may have opened too many applications
2. The current RAM may not able to support multiple applications for its size
Try the following;
1. Restart the computer
2. Check if virus is affecting the performance. Install a good antivirus software and run to remove any virus.
If the above do not work, please raise a ticket.
Attachments (optional) Select files to upload.
Choose File No file chosen
Categories: Check all categories related to this FAQ.
Access Issue / Report a Problem
Access to sharepoint
Feedback
General Inquiry
Report a Problem
Internal Notes:
Save Changes
Reset
Cancel

The form is similar to 'Add New FAQ' form. For descriptions of parameters to be entered in the form, see the **explanation of adding a new FAQ**.

- Edit the 'FAQ' and when done, click the 'Save Changes' button.

Publish / Unpublish an FAQ

'Internal' FAQs can only be viewed by staff members. 'Public' (aka 'Published') FAQs will be available in the web portal for end-users to view.

- Click the name of the category in the FAQ interface

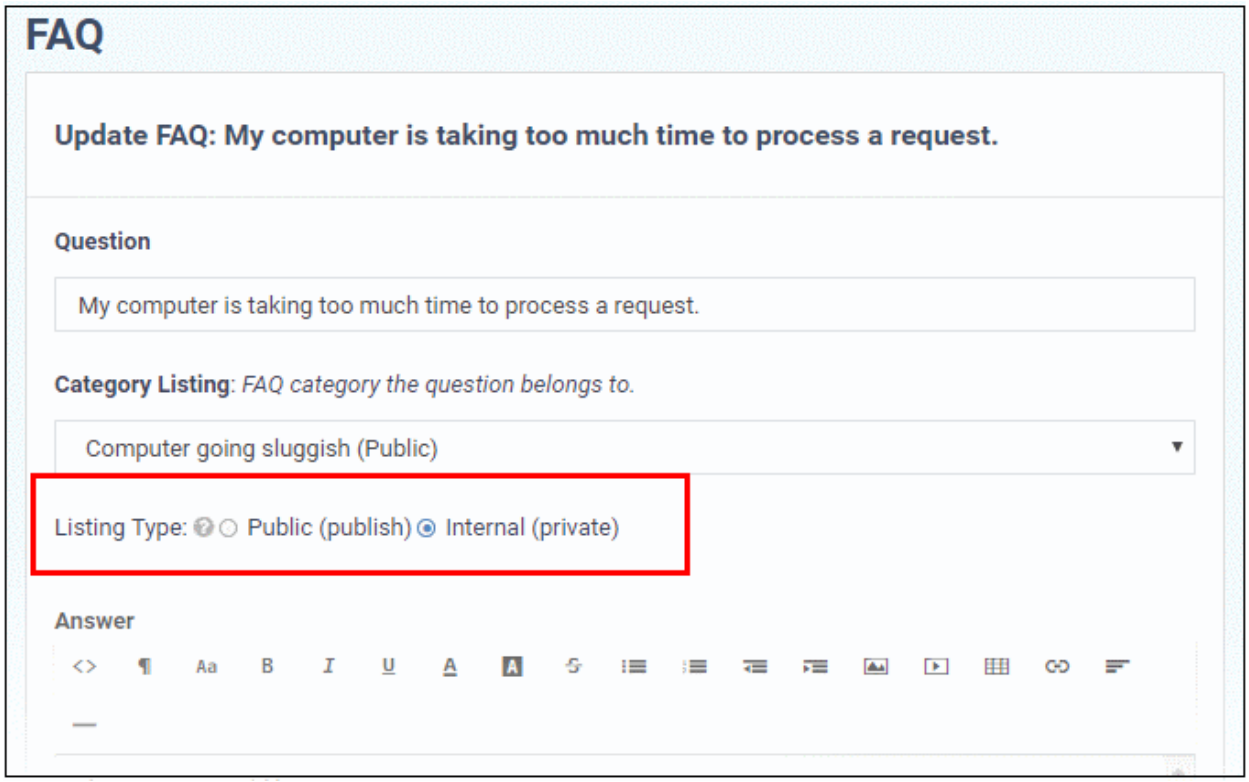
The list of FAQs in the category will be displayed.

- Click the FAQ that you want to publish/unpublish

The 'FAQ' details screen will be displayed.

- To unpublish a published FAQ and make it internal, select 'Unpublish' from the Options drop-down
- To publish an internal FAQ and allow it to be viewed by end-users, select 'Publish' from the Options drop-down
- Click 'Go' below the 'Options' drop-down.

Alternatively, you can open the 'Update FAQ' for the question by selecting 'Edit FAQ' from the 'Options' drop-down and change the 'published' status of the FAQ. See the **explanation of editing an FAQ** for more details.



Remove an FAQ

FAQs that are no longer needed can be removed from Service Desk.

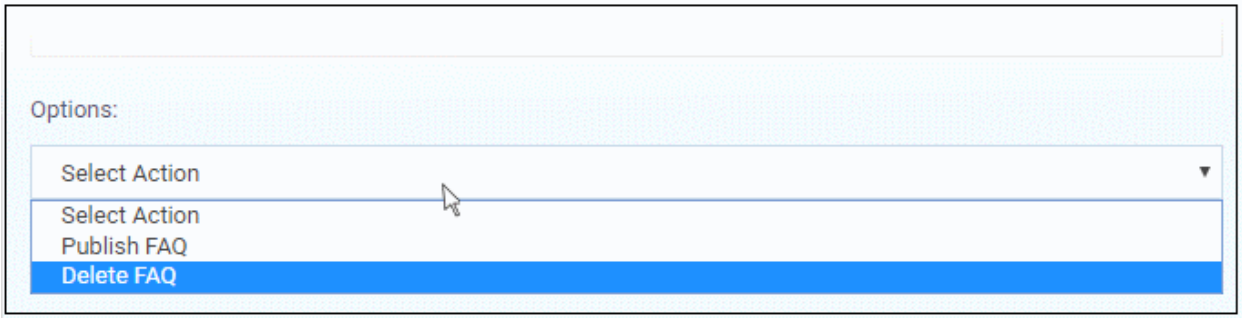
- Click the name of the category from the FAQ interface

The list of FAQs in the category will be displayed.

- Click the FAQ that you want to delete

The 'FAQ details' screen will be displayed.

- Select 'Delete FAQ' from the 'Options' drop-down and click the 'Go' button.



The 'FAQ' will be deleted from the category.

2.4.2 Manage FAQ Categories

- Frequently Asked Questions (FAQs) can be added to categories of your choice. New FAQs must be added to an existing category.
- Click 'Knowledgebase' > 'Categories' to add, view and edit FAQ categories
- Categories can be made 'Public' or 'Internal'. Individual FAQs can also be made 'Public' or 'Internal'.
  - 'Public' category + 'Internal' FAQ = FAQ is internal.
  - 'Public' category + 'Public' FAQ = FAQ is published to end-users.
  - 'Internal' category + 'Internal' FAQ = FAQ is internal.
  - 'Internal' category + 'Public' FAQ = FAQ is internal.
- To publish a category, select the checkbox next to it then click the 'Make Public' button.
- To make a category private, select the checkbox next to it then click the 'Make Internal' button.

Column Headers

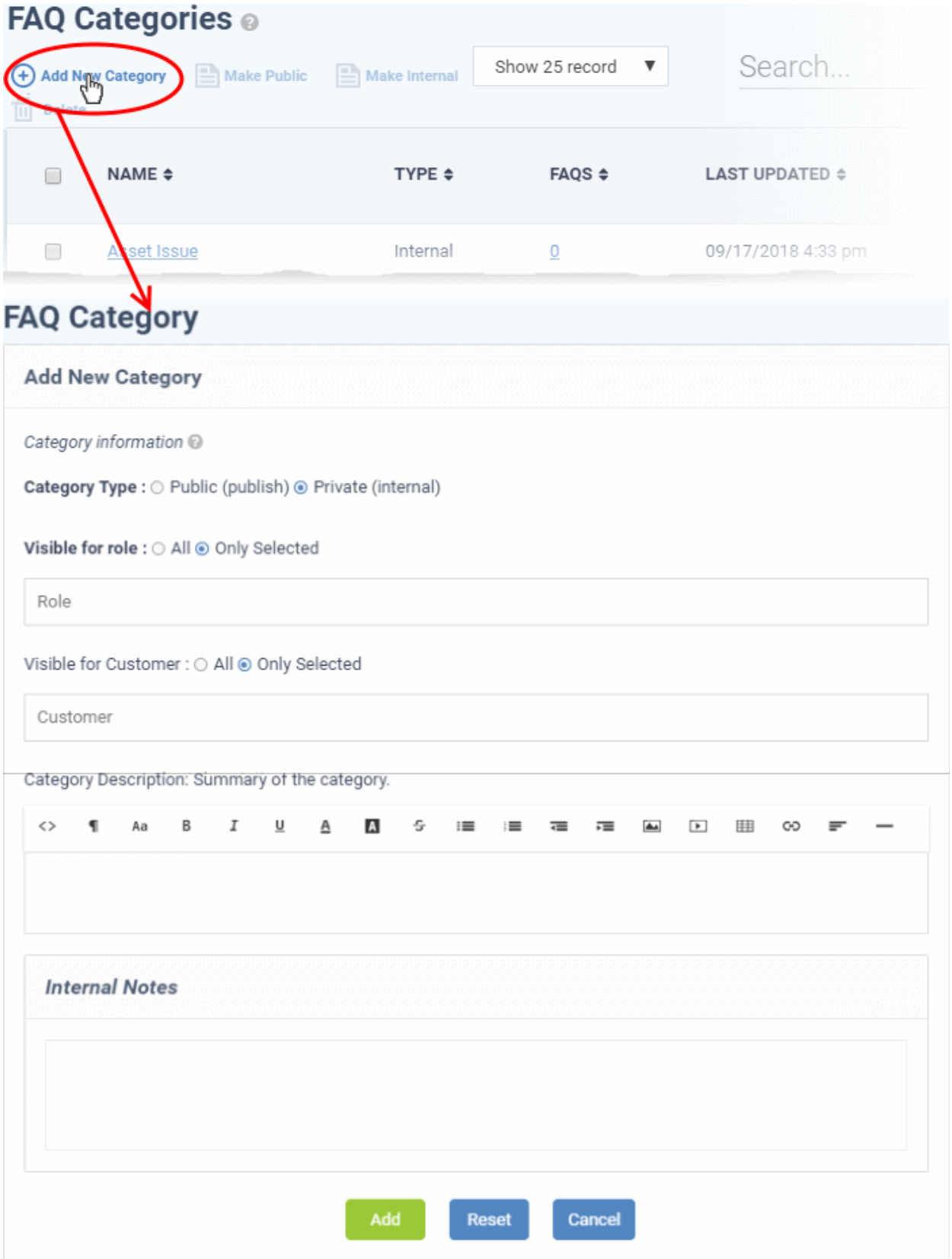
- **Name:** The label of the category. Click a name to open its **update screen**.
- **Type:** Indicates whether the category is published or internal.
- **FAQs:** The total number of FAQs available under the category. Click a number to open the respective 'FAQ Category' screen. See '**FAQs**' for more details.
- **Last Updated:** The date and time at which the category details was edited and updated.

From the interface, a staff member can:

- **Add a new category**
- **Edit a category**
- **Delete a category**
- **Mark a category as public or private**

To add a new category

- Click the 'Add New Category' link at the top



The 'Add New Category' dialog appears.

- **Category Type:** Select whether the FAQ category should be marked as 'Public' or 'Private'. By default it will be selected as 'Private'.
- **Visible for Role**: Specify which staff roles can view the FAQs in the category. Select 'All' to let all staff view them. Choose 'Only Selected' to restrict visibility to certain staff roles.
- **Visible for Customer**: Specify which customer's users are allowed to view the FAQs in this

category. Select 'All' to allow any customer's users to view them. Choose 'Only Selected' to restrict visibility to users of certain companies.

- **Category Name:** Enter a short, descriptive label for the FAQ category.
- **Category Description:** Enter a brief description for the category.
- **Internal Notes:** Add notes that can be viewed by staff and admins.

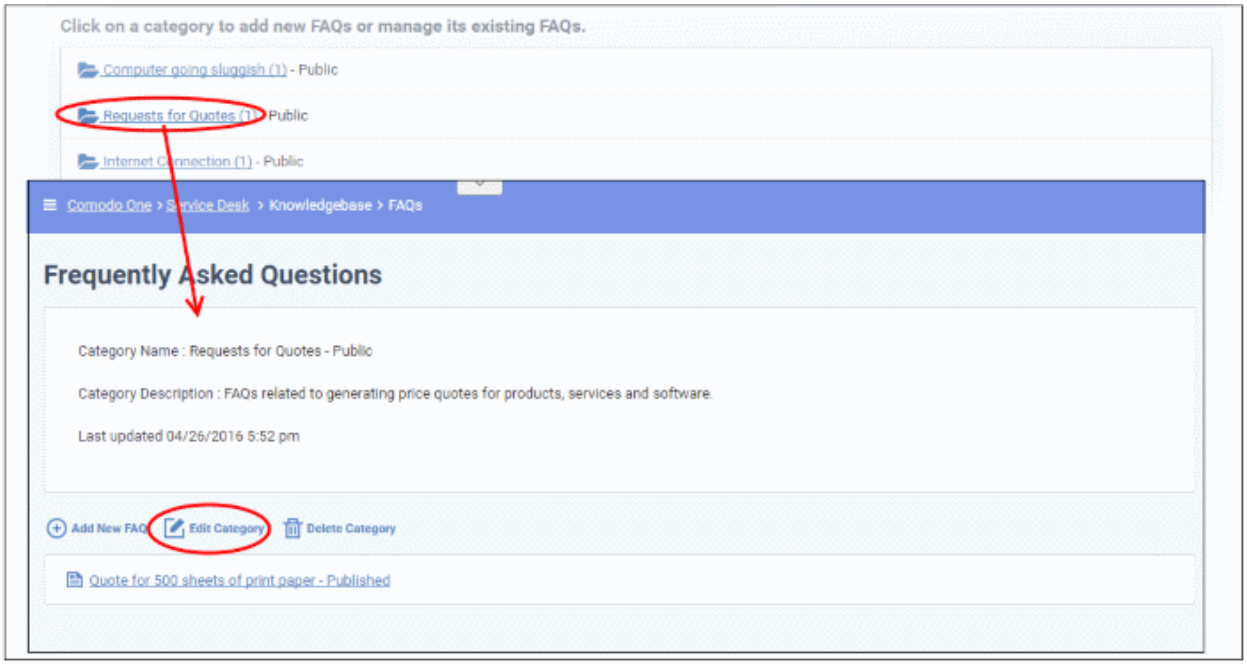
- Click the 'Reset' button to clear the fields.
- Click the 'Add' button to save the category.

To edit a category

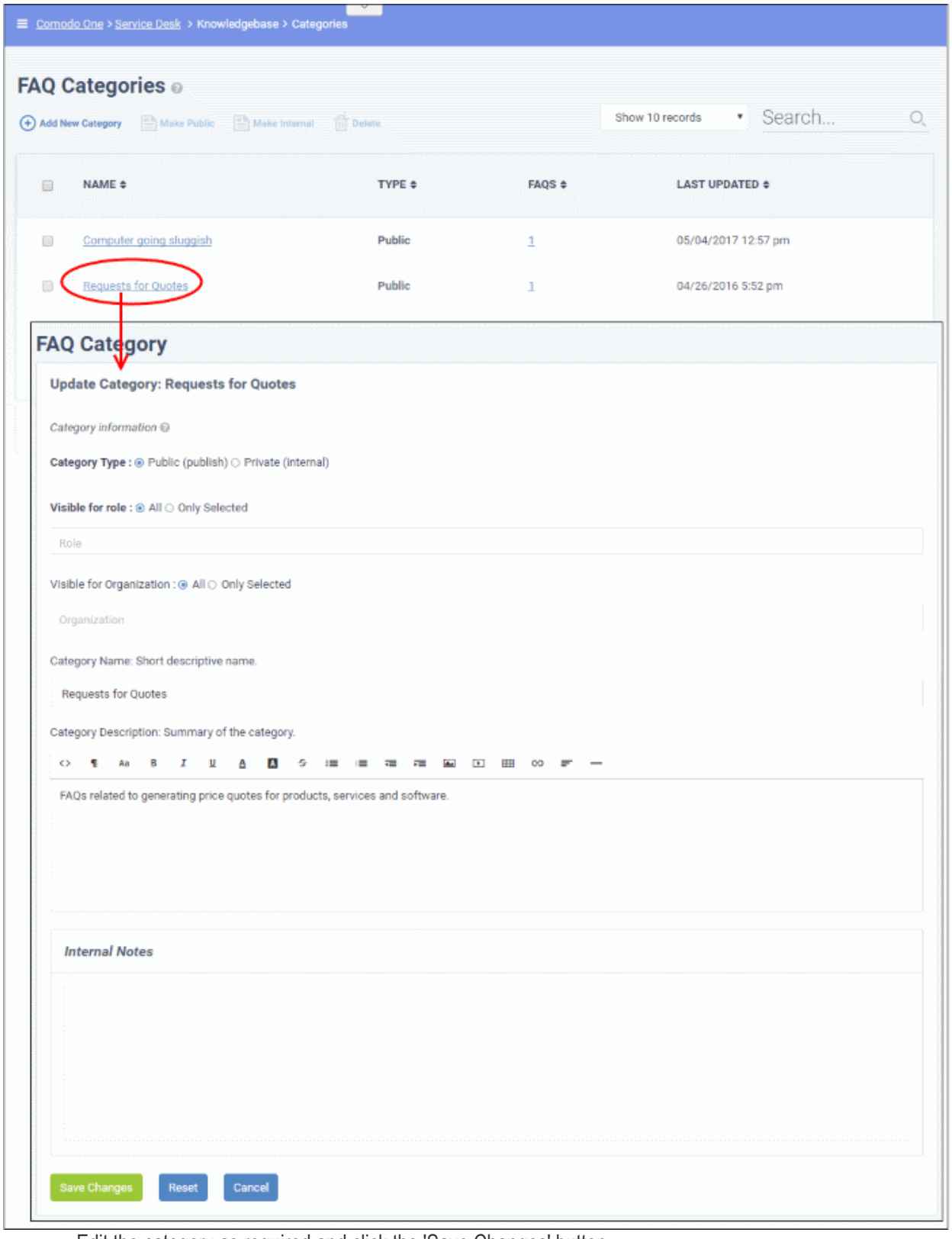
- Open 'Knowledgebase' > 'Categories'
- Click on a category name to edit the category

  OR

- Open 'Knowledgebase' > 'FAQs'
- Click on a category name then click 'Edit Category'



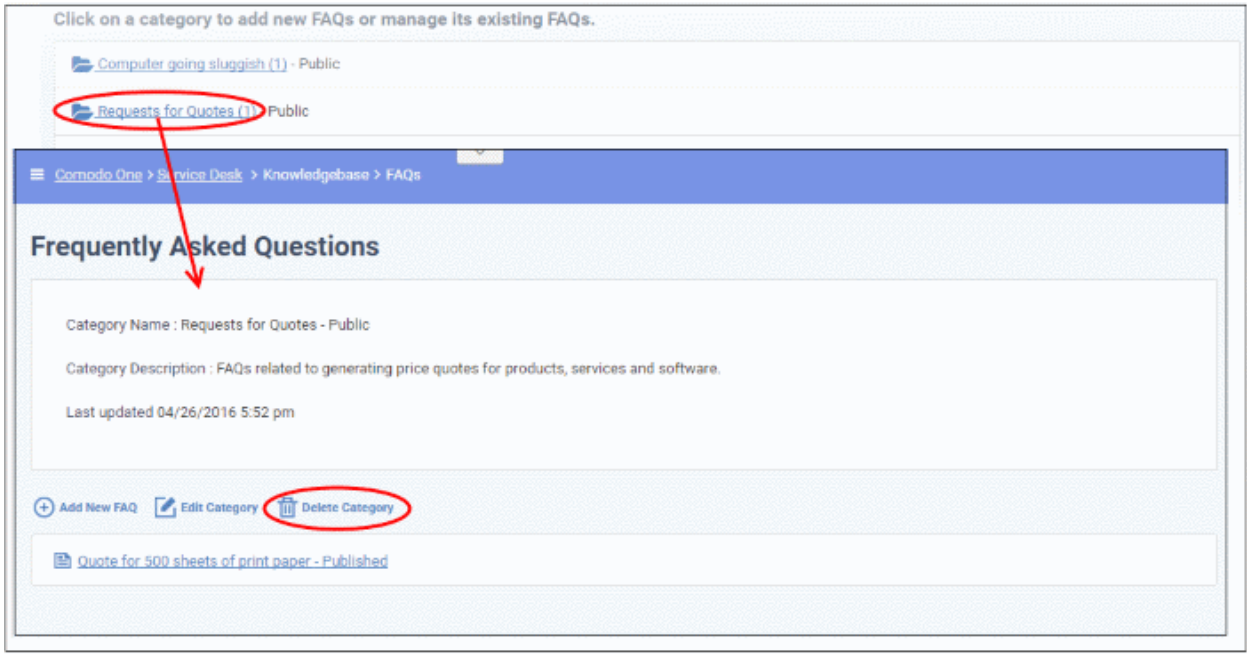
The 'Update Category' screen will be displayed. The form is similar to 'Add New Category' form. See the **explanation of adding a new category** for descriptions of the settings on this page.



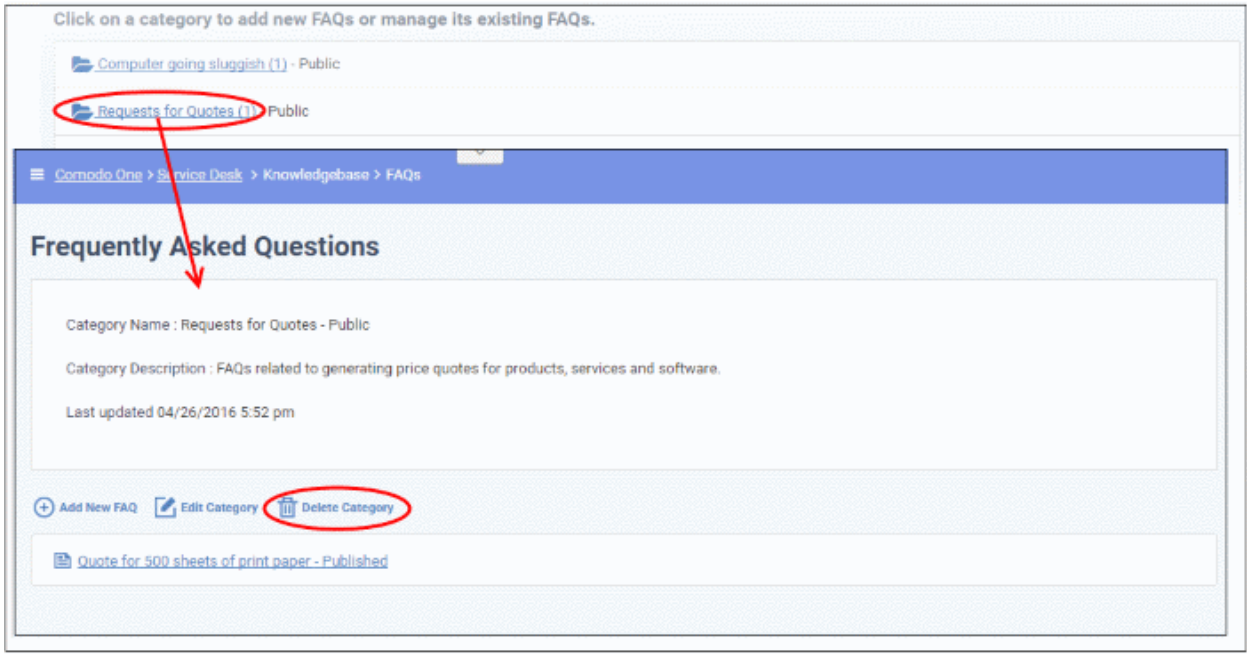
- Edit the category as required and click the 'Save Changes' button.

To delete a category

- Select the category and click 'Delete' at the top.



- Alternatively, open 'Knowlegdebase > 'FAQs' page, click on the FAQ category to be edited and click 'Delete Category' from the FAQ list page.



- Click 'Yes, Do it!' in the confirmation screen.

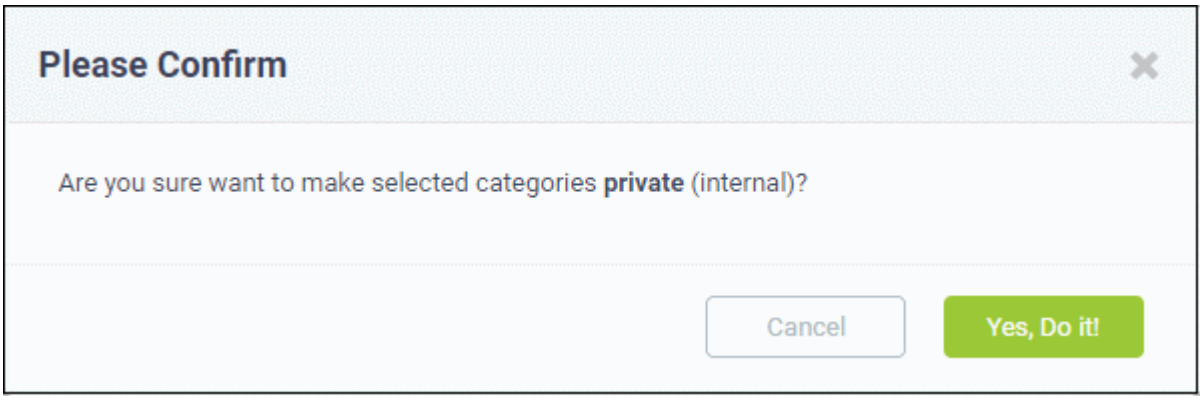
Note: Removing a category will also delete the FAQs under it.

To mark a category as public or private

- Click 'Knowledgebase' > 'Categories' to open the 'Categories' interface

- To publish a category, select it and click the 'Make Public' button.
- To make a category as private, select it and click the 'Make Internal' button.

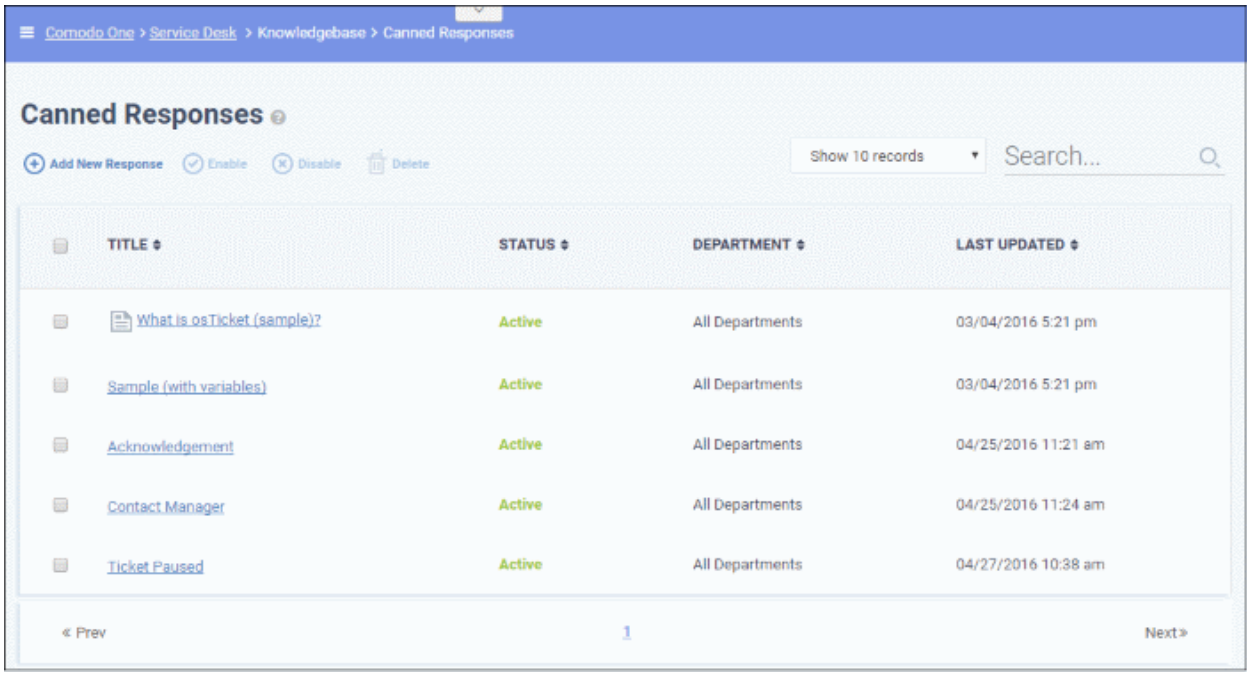
- In the confirmation screen, click the 'Yes, Do it!' button.



2.4.3 Canned Responses

The 'Canned Responses' feature allows staff to create stock replies to common or routine issues. Staff can then quickly insert one or more canned answers when replying to a ticket.

- Canned responses can be enabled in 'Admin Panel' > 'Settings' > 'Knowledgebase'. Disabling will not affect canned responses automatically sent out as part of a filter...
- Canned responses can be automatically sent out in reply to certain tickets. Admins can set this behavior in Ticket Filters ('Admin Panel' > 'Manage' > 'Ticket Filters').
- To open the 'Canned Responses' screen, click 'Knowledgebase' on the left then 'Canned Responses' in the 'Staff Panel'.



Sorting and searching options

- Click a column header to sort items in ascending/descending order
- Use the 'Show records' drop-down on the right allows you to select the number of entries to be displayed per page.
- Use the 'Search' field to filter by response name.
- To remove all filters, clear the search field and press 'Enter' (or simply click the 'Canned Responses' link).

Column Headers

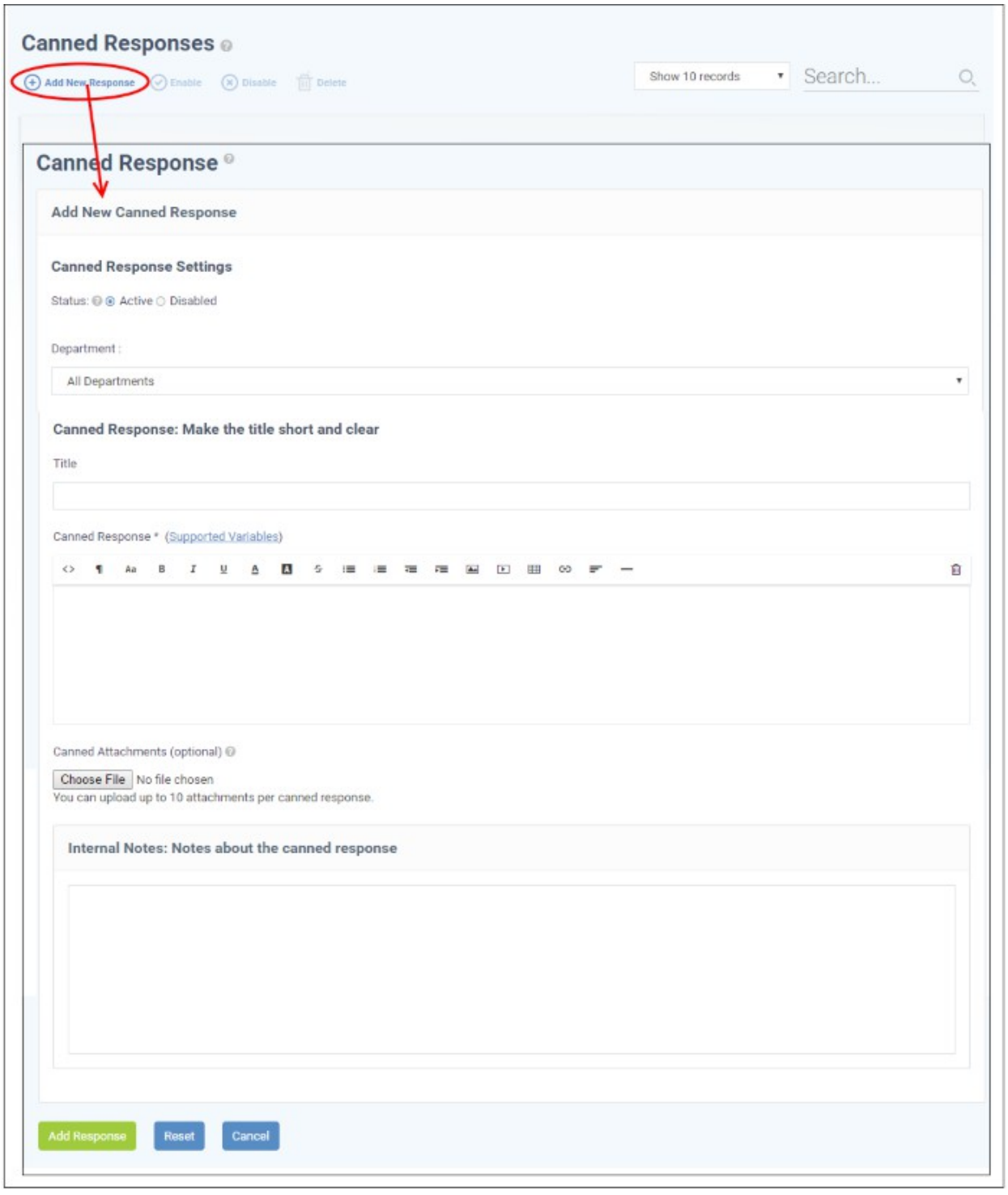
- **Title:** The name of the 'Canned Response'. Clicking a name will open its **update screen**.
- **Status**: Indicates whether the 'Canned Response' is active or disabled. Only 'Active' responses will be available for selection from 'Ticket Details' interface while managing a ticket. See **Ticket Details** for more details.
- **Department:** Displays to which department the pre-made reply is assigned and will be available for response to tickets for that department.
- **Last Updated:** The date and time the 'Canned Responses' was edited and updated.

From the interface, a staff member can:

- **Add a new 'Canned Response'**
- **Edit a 'Canned Response'**
- **Delete a 'Canned Response'**
- **Enable or disable a 'Canned Response'**

To add a new 'Canned Response'

- Click 'Add New Response' at the top



The 'Add New Canned Response' screen will appear.

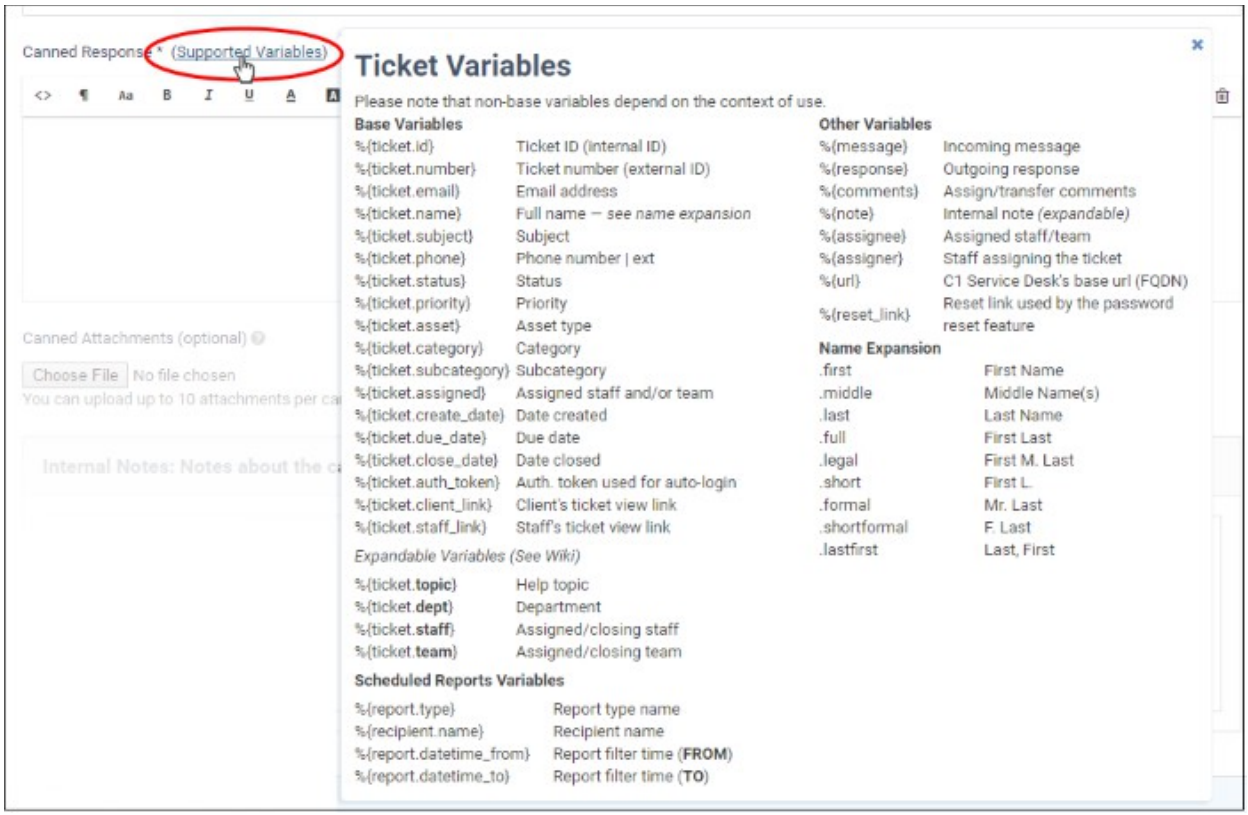
Canned Response Settings

- **Status**: Allows you to choose whether the canned response should be enabled by default or not.
  - **Active**: The 'Canned Response' will be enabled and will be available for selection while processing a ticket, from the 'Response' drop-down in the 'Ticket Details' interface. See **Ticket Details** for more details.
  - **Disabled**: The canned response will not be available for selection in the ticket details interface. You can enable the response at anytime.
- **Department**: Select the department to which the 'Canned Response' will be assigned. The response will be available for tickets that are assigned this department. If 'All Department' is selected, then it will be available

for all ticket responses.

Canned Response

- **Title:** Enter a suitable title for the pre-made reply.
- **Canned Response:** Enter the reply text in the text editor. You can also insert variables into the text to fetch relevant information for the ticket from the database. To view the full list of variables available in Service Desk, click the 'Supported Variables' link.



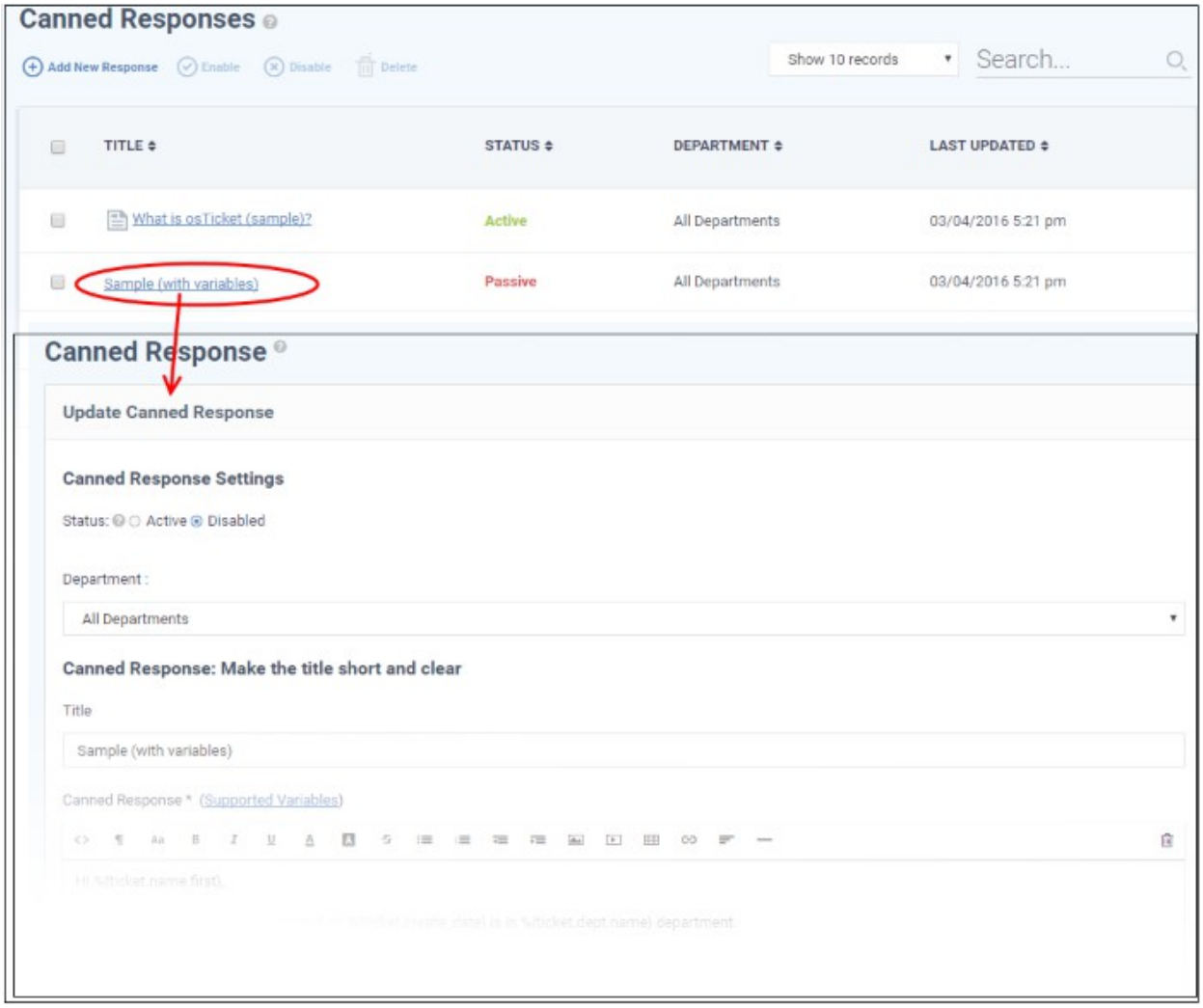
  - To clear the text, click the trash can icon at the top right.
- **Canned Attachments**: To add any attachments to the reply, click the 'Choose File' button, select the required file and click the 'Open' button. To remove the attachment, click on the file and select 'OK' from the confirmation screen. You can attach up to 10 files per 'Canned Response'.

Internal Note

  - Add notes for the 'Canned Response' that are for internal purpose only.
- Click the 'Reset' button to clear all selections and entries.
- Click the 'Add Response' button to save the reply text.

To edit a 'Canned Response'

- Click the canned response to be edited

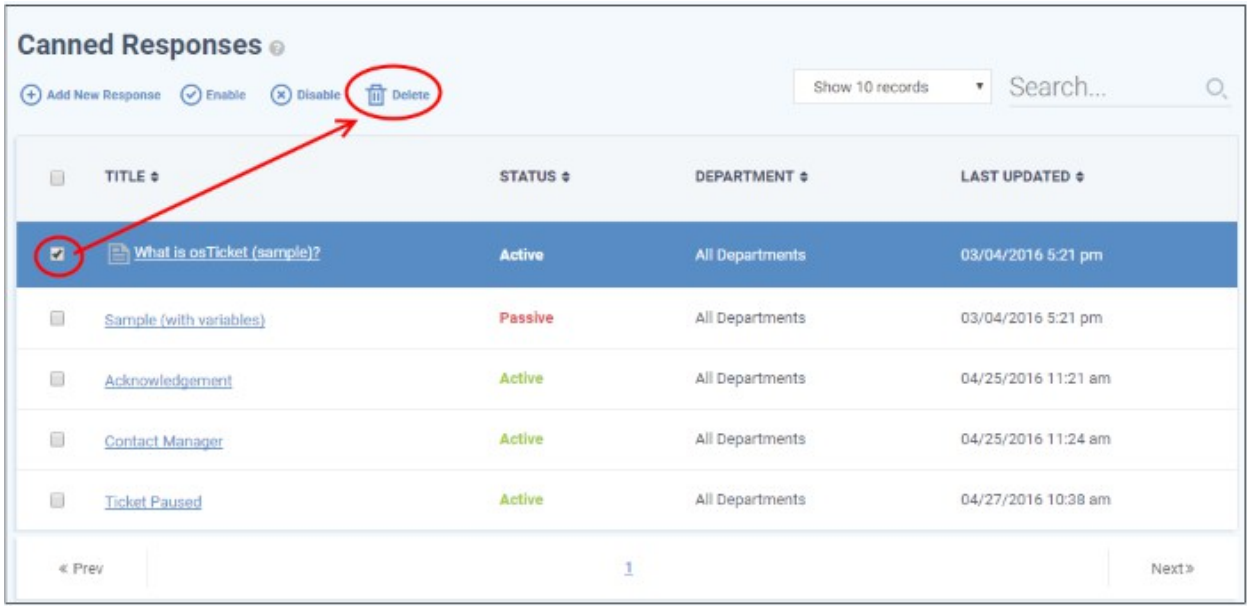


The 'Update Canned Response' screen will be displayed. The screen is similar to Add a New Canned Response screen. For descriptions of the parameters, see the **explanation of adding a new canned response**.

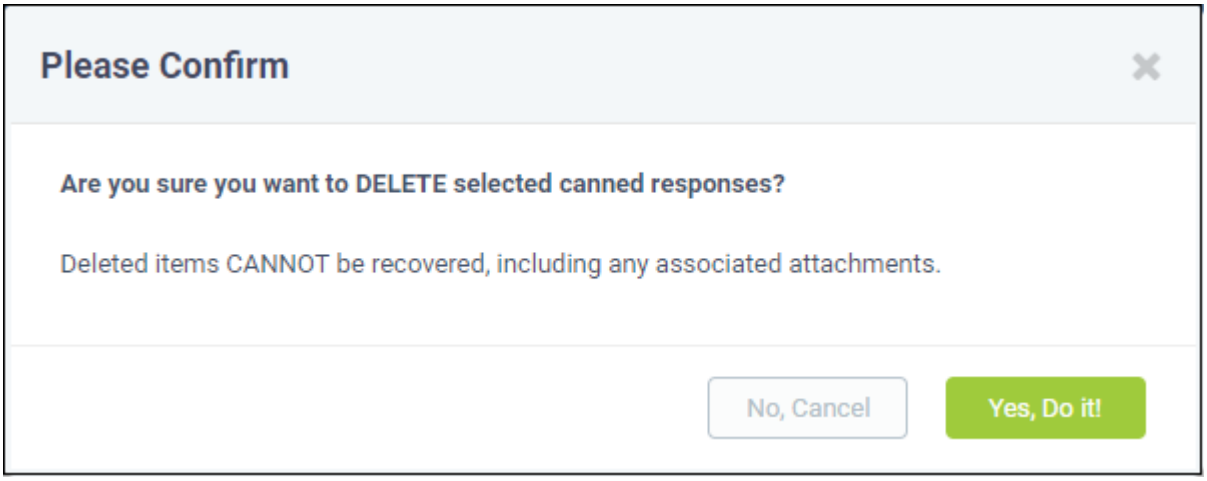
- Edit the canned response as required and click the 'Save Changes' button.

To delete a 'Canned Response'

- Select the canned responses you want to remove from the list and click 'Delete' at the top

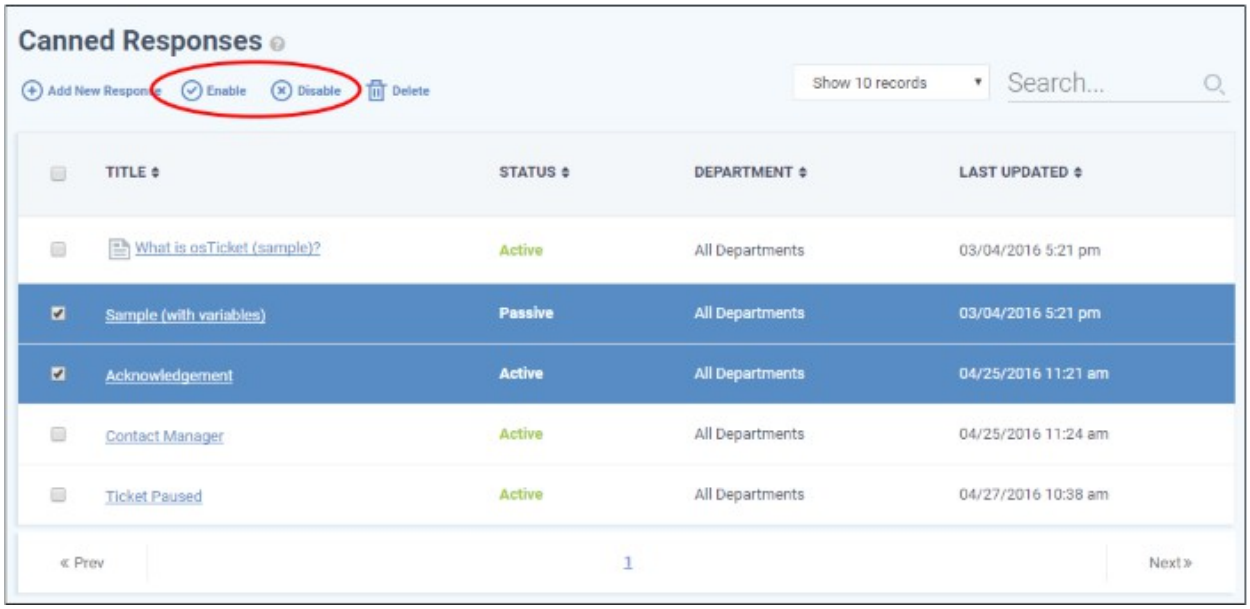


- Click the 'Yes, Do it!' button in the confirmation screen.

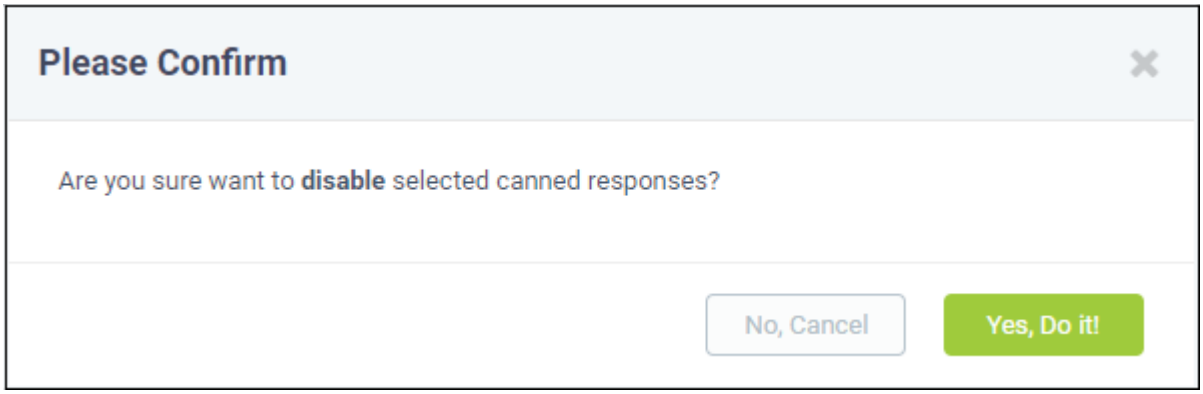


Enable or disable a 'Canned Response'

- To disable active canned response(s), select it/them and click 'Disable' at the top
- To make disabled canned responses active, select them and click 'Enable' at the top



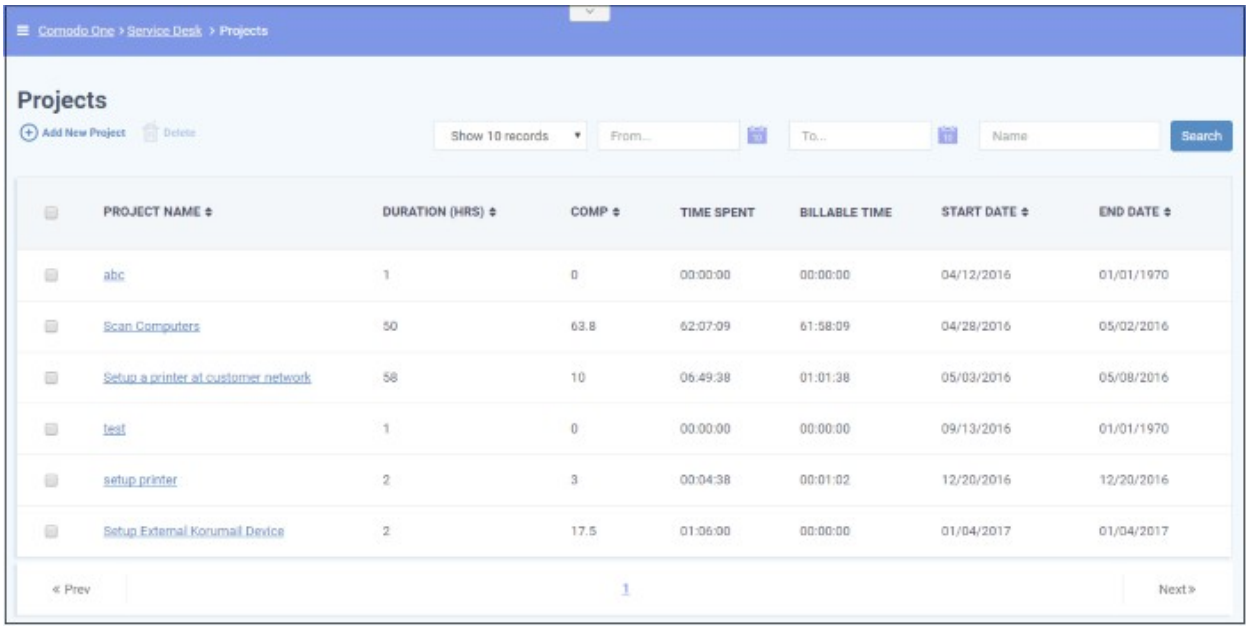
- Click the the 'Yes, Do it!' button in the confirmation dialog.



2.5 Manage Projects

Service desk projects allow staff to plan delivery time-lines for larger scale tasks which may involve multiple sub-tasks. Each task can be assigned a total duration, completion percentage and billable time. You can also create sub-tasks and associate a task with one or more tickets. Projects are displayed as a Gantt chart, allowing you to easily track overall progress.

- To open the 'Projects' interface, click 'Projects' on the left in the 'Staff Panel'.



Existing projects will be displayed in the screen.

Sorting items

- Click a column header to sort items in ascending/descending order

The 'Show records' drop-down on the right allows you to select the number of entries to be displayed per page. The options range from 10 records per page up to 100. The default value can be set in the '**My Profile**' interface. You can navigate to different pages by clicking 'Next' and 'Prev'.

Search Option

- The 'Search' field allows you to filter by project name. Enter the parameter fully or partly in the 'Search' field and click the 'Search' button.
- The 'From' and 'To' date fields allows you to filter by time periods. Enter or select the date from the calendars and click the 'Search' button.
- You can group name and date filters to refine your search.
- To clear filters and display all projects, clear the search fields (or simply click the 'Projects' link).

Column Headers

- **Project Name** - The name of project added.
- **Duration** - The total duration of a project is the combined duration of its individual tasks.
- **Completion** - The total completion status of a project is calculated from the completion percentage of individual tasks in the project.
- **Time Spent** - Total time spent in individual tasks, sub tasks and tickets.
- **Billable Time** - Total billable time spent in individual tasks, sub tasks and tickets.
- **Start Date** - Date at which the project was started, or is due to start.
- **End Date** - Date and which the project was completed, or is due to be completed. Completion date is calculated from the total duration of individual tasks in the project.

From the Projects interface, staff members can:

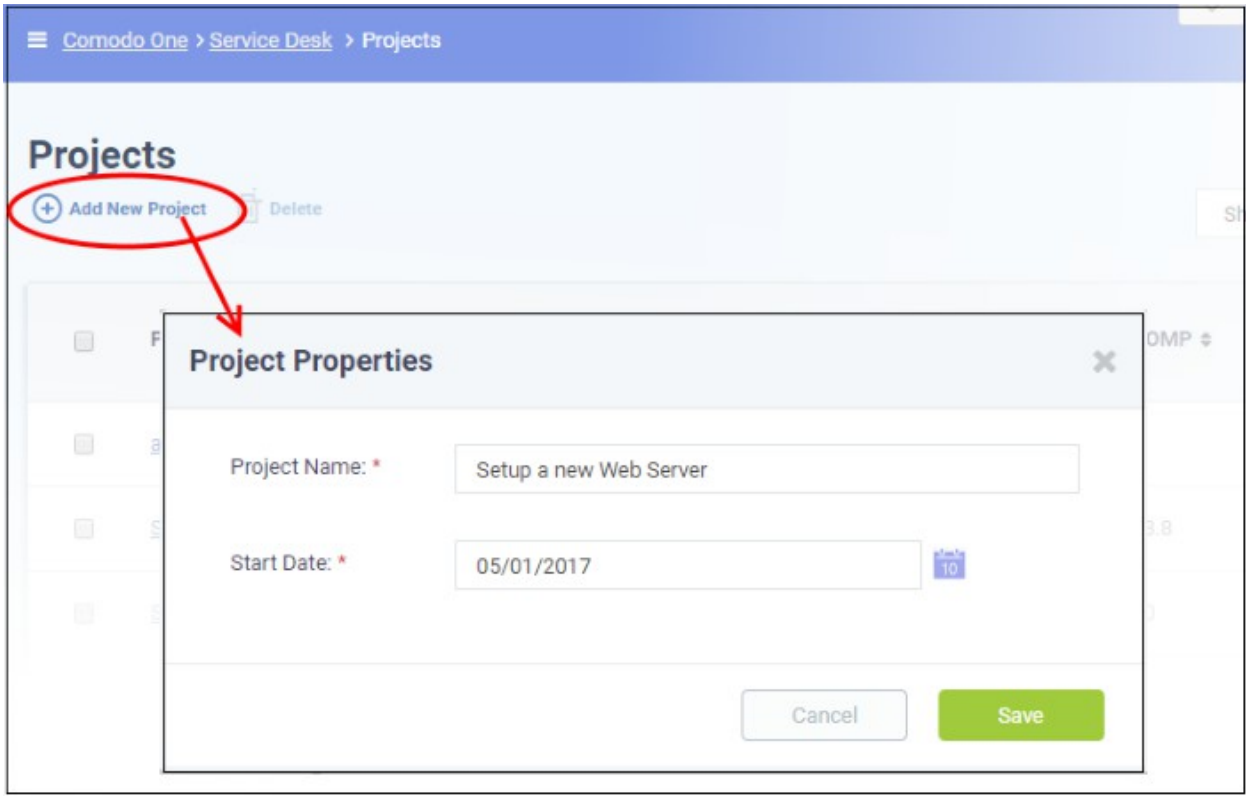
- **Create a new project and add Tasks and Sub Tasks**
- **View the project status and update it**
- **Remove a project**

Creating a new Project

Staff members can create new projects and integrate tasks to it. You should specify a duration for each task/sub-task.

To create a new project

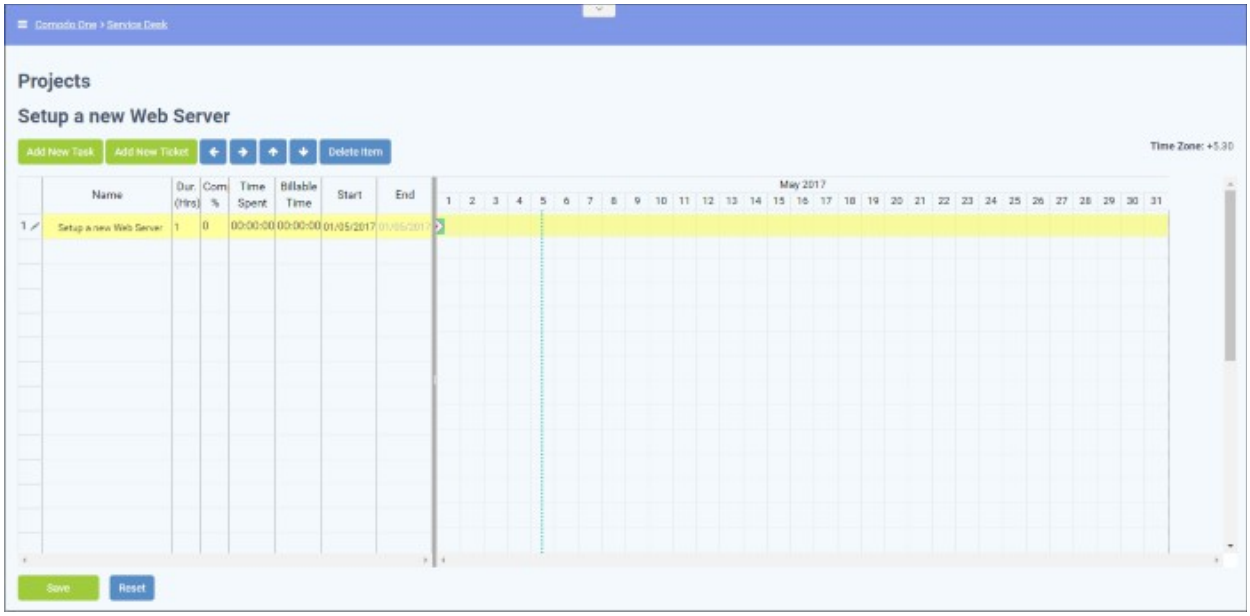
- Click 'Add New Project' from the 'Projects' interface



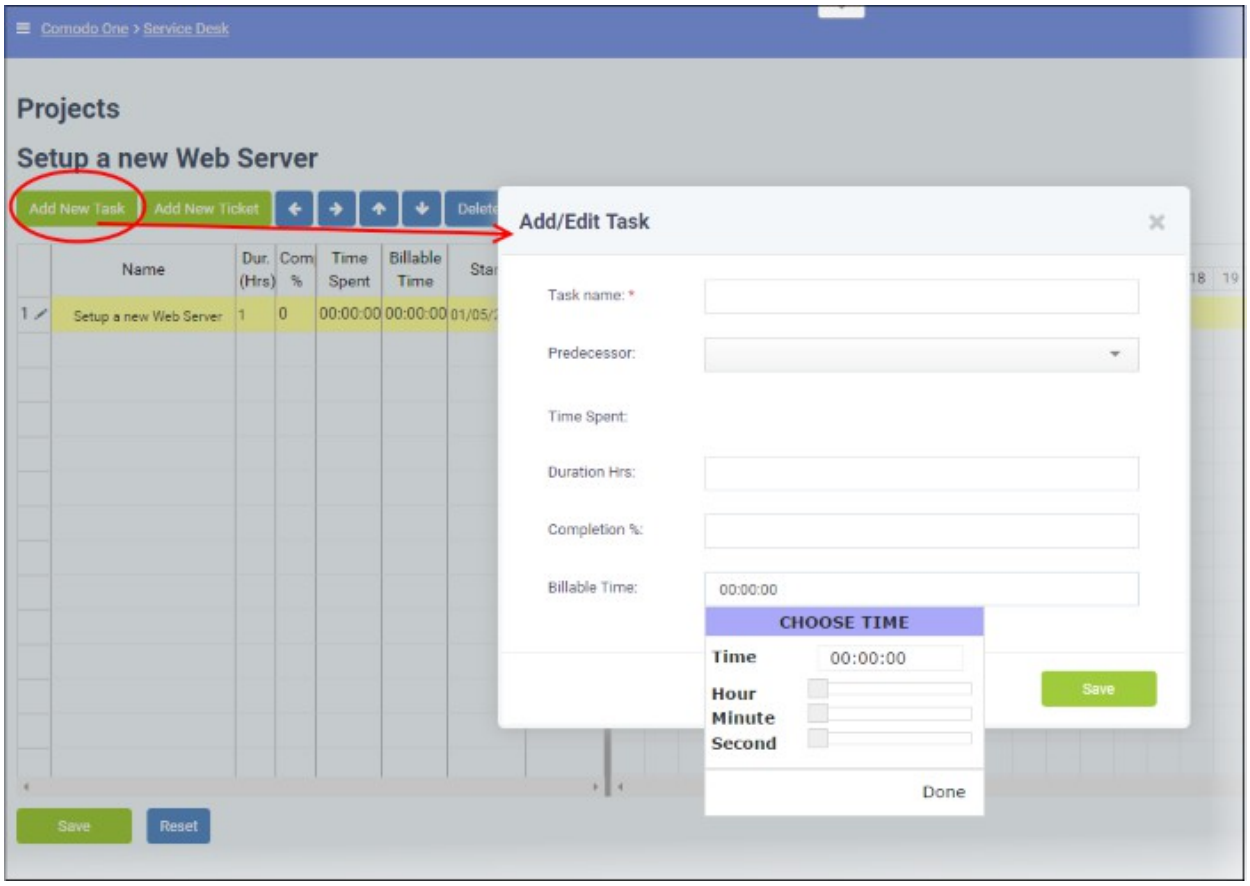
The Project Properties dialog will appear.

- Enter a name for the project
- Enter the project start date by clicking the calendar icon beside 'Start Date'
- Click 'Save'

A new project will be created and the project page will be displayed. The project title will be added as the root task to the project. You can add sub-tasks at required hierarchy levels and associate tickets with them.



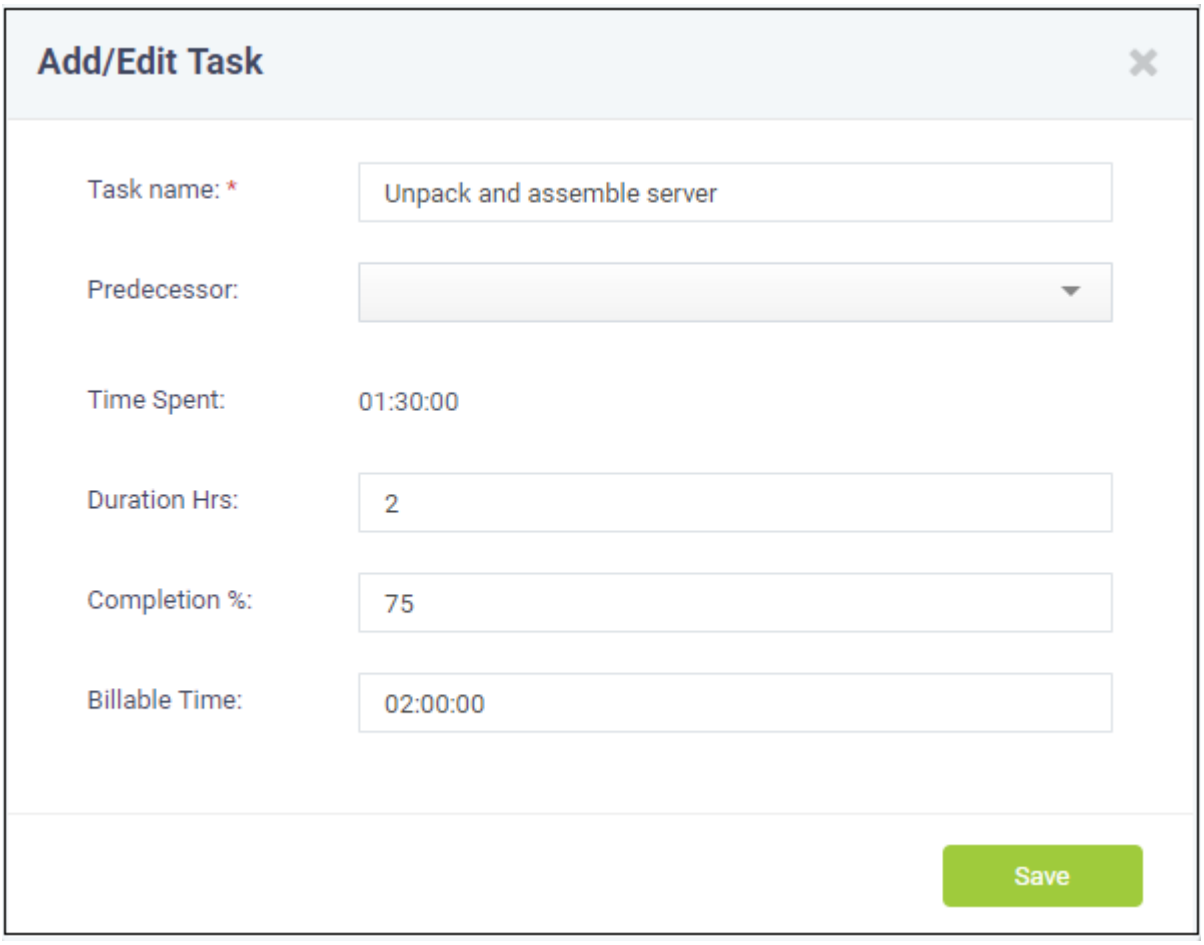
- To add a sub-task:
  - Select the root task and click the 'Add New Task' button at the top



The 'Add/Edit Task' dialog will appear.

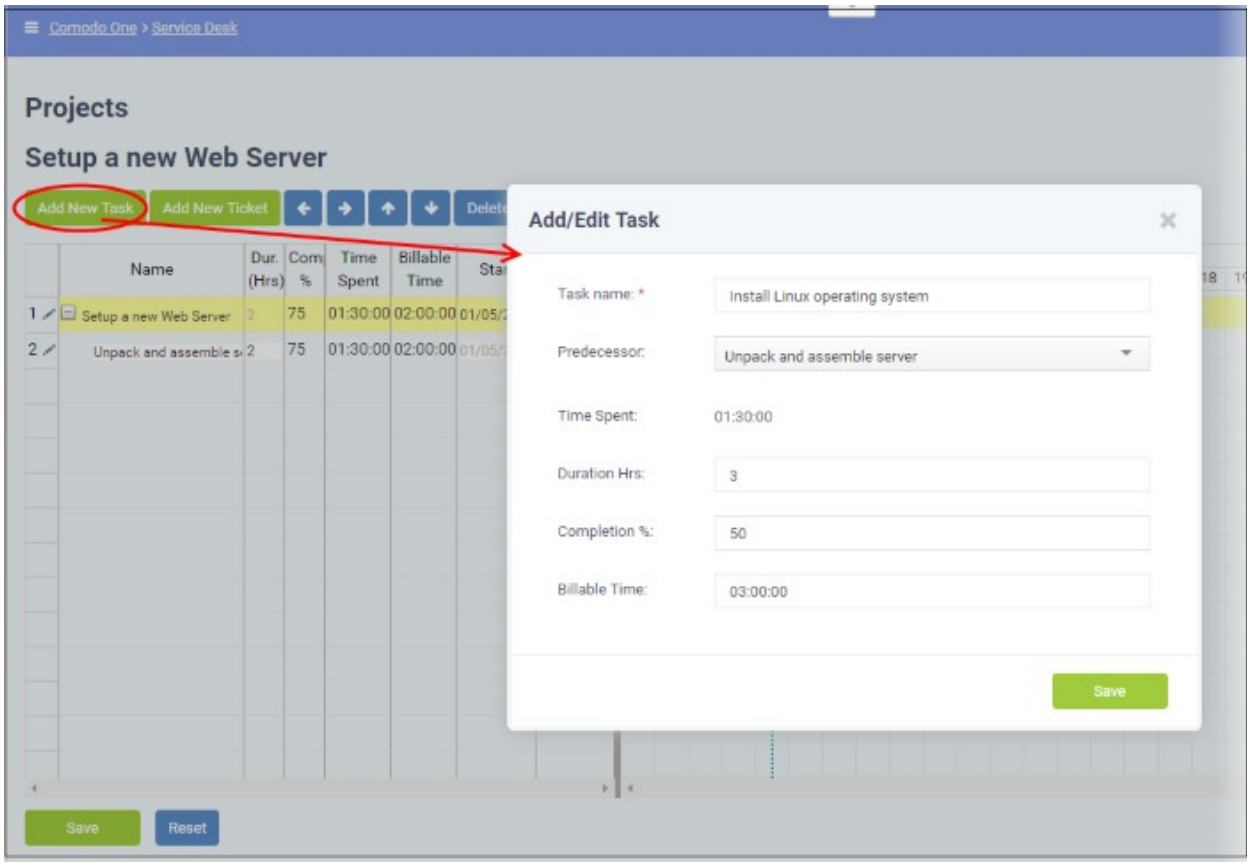
- Enter the name of the task
- Predecessor (optional). Select a task which must be completed before the new task can begin.
- Enter the time required (in hours) to complete the task in the 'Duration' field
- If the task is in-progress, enter the completion percentage in the 'Completion %' 'field

The time spent field will be automatically populated from the entered values.



- Enter the quantity of chargeable hours in the 'Billable Time' field using the sliders and click 'Save'.
- Repeat the process to add more tasks.

- To add another main task, select the project and click 'Add New Task'. This will create a sibling task.



The 'Add/Edit Task' dialog will appear.

- Enter the name for the task
- Enter the predecessor to continue from the previous task/subtask.
- Enter the time duration required (in hours) to complete the task in the 'Duration' field
- If the task is in-progress, enter the completion percentage on it in the 'Completion %' 'field

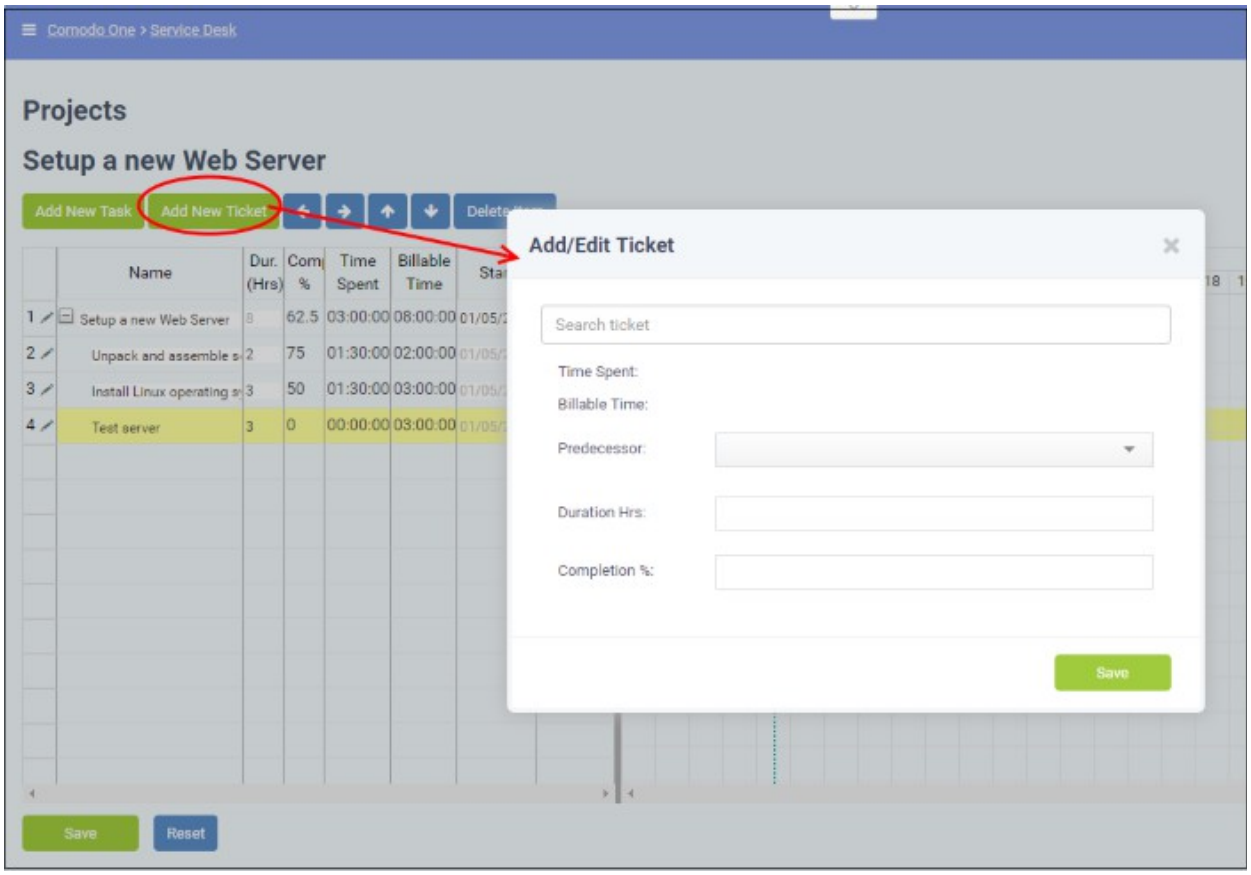
The time spent field will be automatically populated from the entered values.

- Enter the quantity of chargeable hours in the 'Billable Time' field using the sliders and click 'Save'.
- Repeat the process to add more tasks.

- To add a sub-task to a main-task:
  - Select the parent level task
  - Click the 'Add New Task' button and repeat the process as outlined **above**.

The duration and completion percentage of the parent task will be updated as per the figures entered in the corresponding fields of all sub-tasks.

- To link a ticket to a task
  - Select the task/sub-task to which the ticket is to be linked and click 'Add New Ticket' button

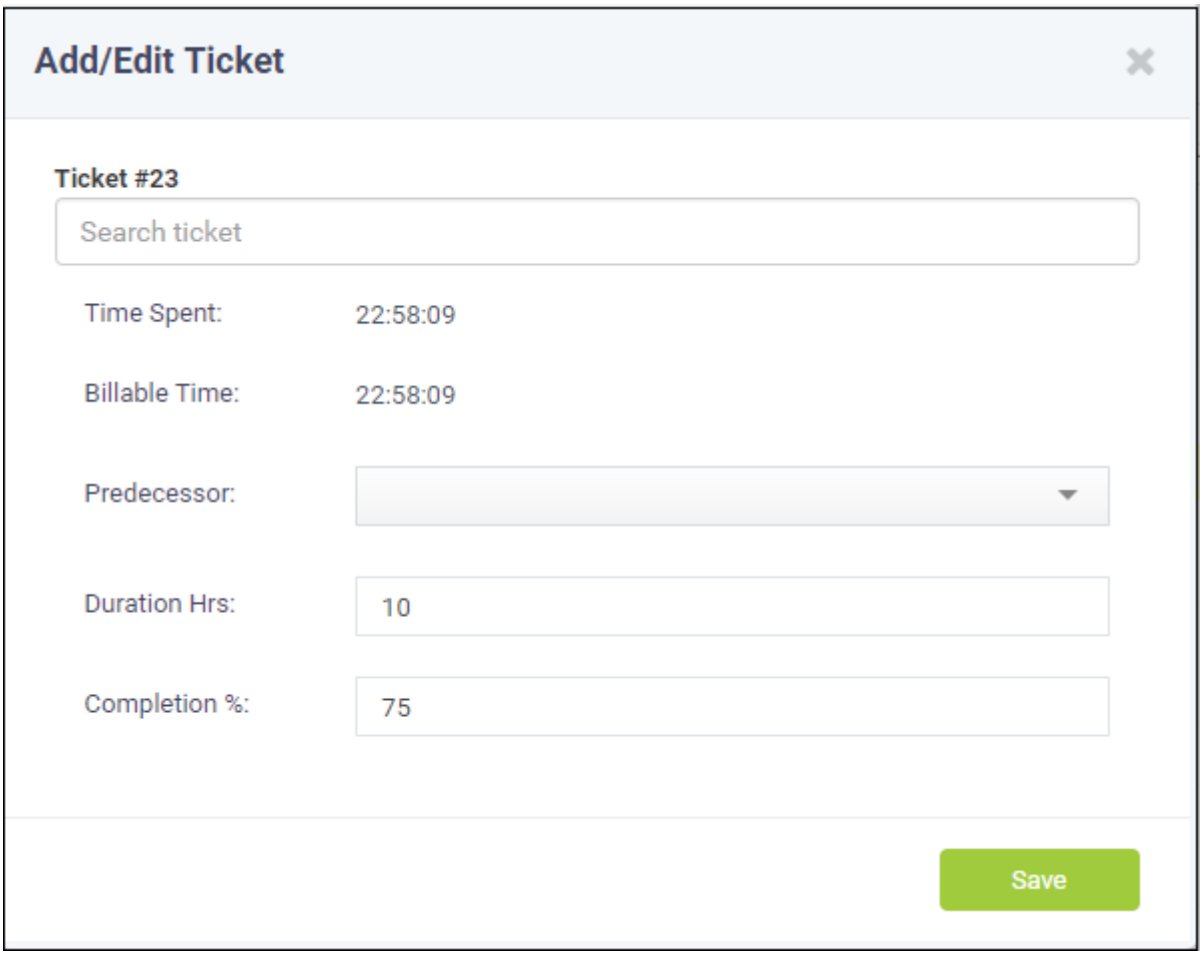


The Add/Edit ticket dialog will appear.

- Enter the ticket number or subject of the ticket in the 'Search Ticket' field and choose the ticket to be added from the drop-down options. Please note that the time spent will be displays the actual time spent based on the duration hrs and completion percentage entered.
- Enter the predecessor to continue from the previous task/subtask.

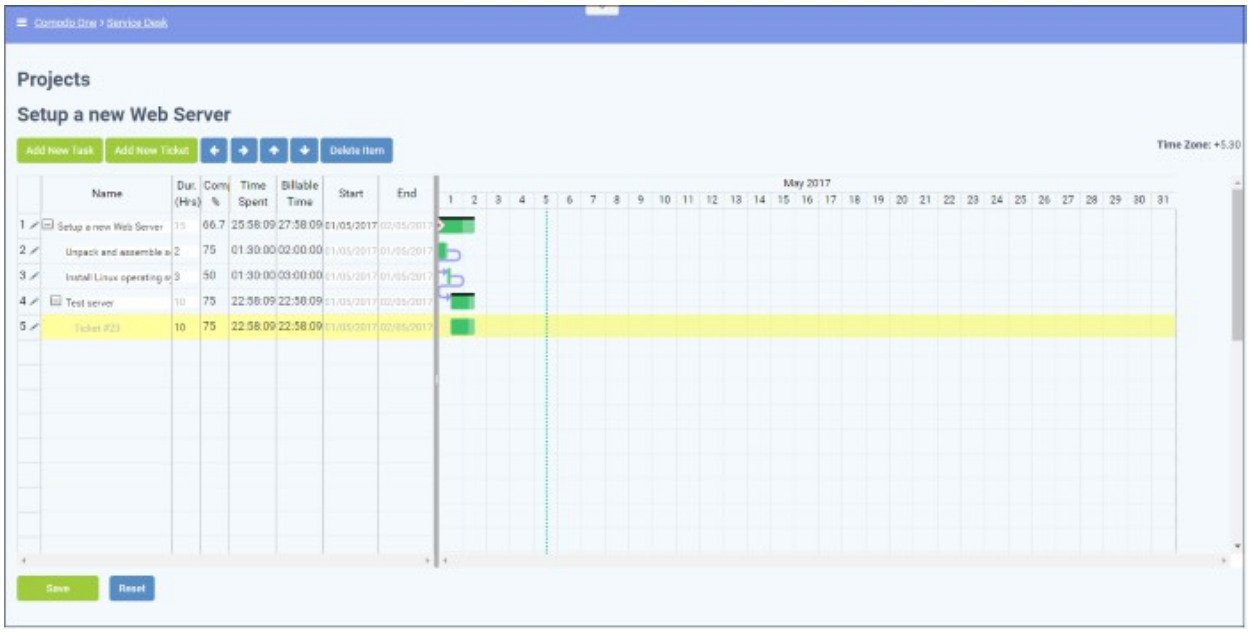
The time spent and billable time will be automatically populated for the progress of the ticket so far.

- Enter the duration for the ticket completion and the completion percentage in the respective fields.



- Click 'Save'.

The ticket will be linked to the task.



The time spent on the task and the billable time will be fetched from the ticket details and automatically updated. You can also add sub-tickets to a task/sub-task, which is processed concurrently with the main tickets. The duration and completion percentage of the sub tickets will not count towards the total duration and completion percentage of the project.

- To delete a task, sub-task, ticket or a sub-ticket, select the item and click 'Delete Item' at the top.

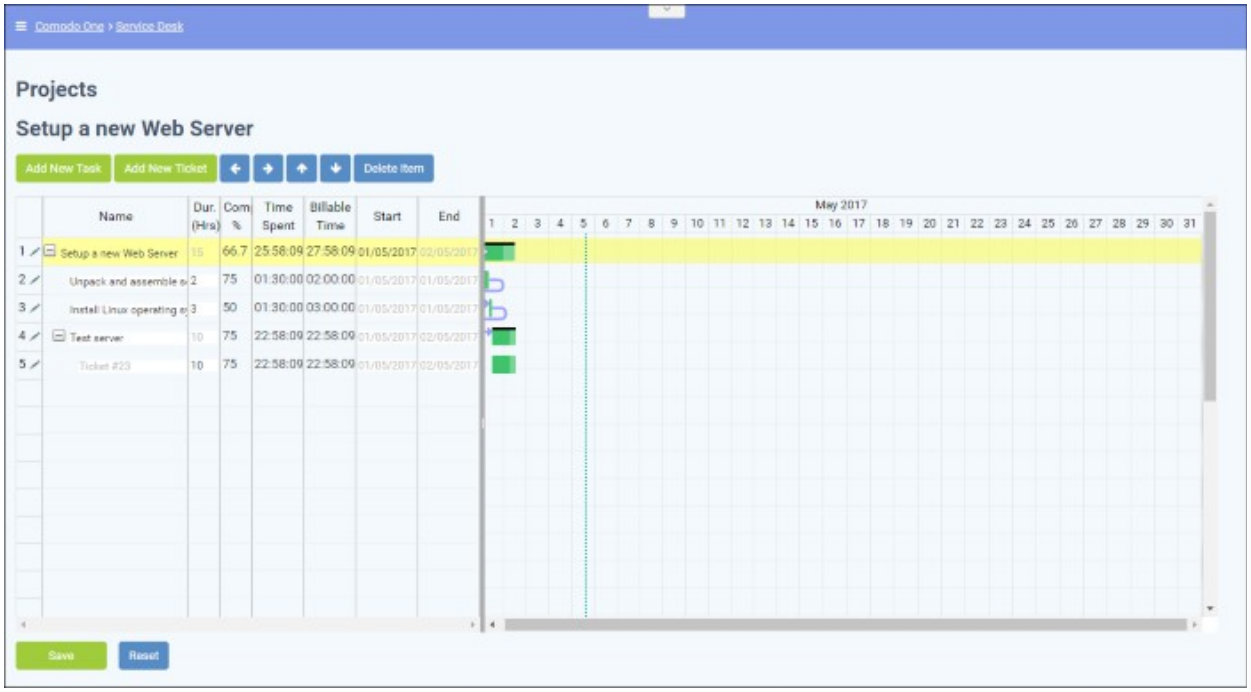
- Click 'Save' in the project viewer interface to save your changes.

Viewing Project Status and Updating it

Administrators or staff members can view the status of individual tasks and sub-tasks, tickets and sub-tickets and overall progress of a project from the Project Viewer interface.

To view a project

- Open the Projects interface by clicking 'Projects' on the left from the 'Staff Panel'
- Click a project name to open the project time-line:



The tasks, sub-tasks, tickets and sub-tickets added to the project are displayed as a tree structure in the first column. The left hand side pane shows the details of each item and the right hand side pane shows progress of each item as a Gantt chart.

Project Viewer - Column Descriptions			
Column Header	**Parent level Task**	**Child Task**	**Tickets/Sub Tickets**
Duration	The total duration of a parent level task is the combined duration of its child tasks and tickets.	Duration of the individual task, as entered while adding/editing it or the combined duration of the tickets linked to it. Note: Sub tickets are excluded for calculation of duration.	Duration of the ticket
Completion	The total completion status of a parent level task is calculated from the completion percentages of child tasks and tickets.	The completion percentage of individual task or the combined completion percentages of tickets linked to it. Note: Sub tickets are excluded for calculation of completion status.	Completion percentage of individual ticket

Time Spent	Total time spent in child tasks and tickets.	Time spent on individual task or the combined time spent on tickets linked to it, excluding the sub-tickets. Note: Sub tickets are excluded for calculation of time spent.	Time spent on individual ticket
Billable Time	Total billable time spent in child tasks and tickets.	Billable time spent on individual task or the combined billable time spent, from tickets linked to it, excluding the sub-tickets. Note: Sub tickets are excluded for calculation of billable time spent.	Billable time spent on individual ticket
Start	Date at which the task was started, or is due to start.	Date at which the task was started, or is due to start.	Date at which the ticket was started.
End	Date and which the task was completed, or is due to be completed. Completion date is calculated from the total duration of child tasks.	Date at which the individual task was completed, or is due to be completed. Completion date is calculated from the duration of the individual task or the total duration of tickets linked to it.	Date at which the individual ticket was completed, or is due to be completed.

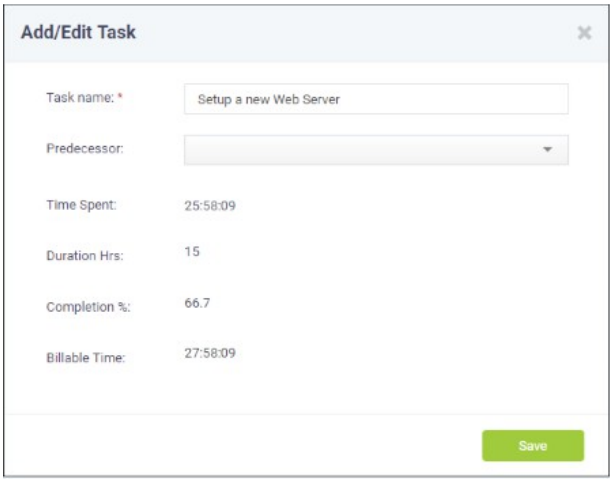
- To add a new item, click the respective button from the top right and enter the details of the item in the 'Add/Edit Task' or 'Add/Edit Ticket' dialog. For more details, refer to the explanation **above**.

To edit/update a task

- Click the pencil icon at the left of the item or double click on the respective bar in the Gannt chart.

The Add/Edit Task dialog will appear for the respective task.

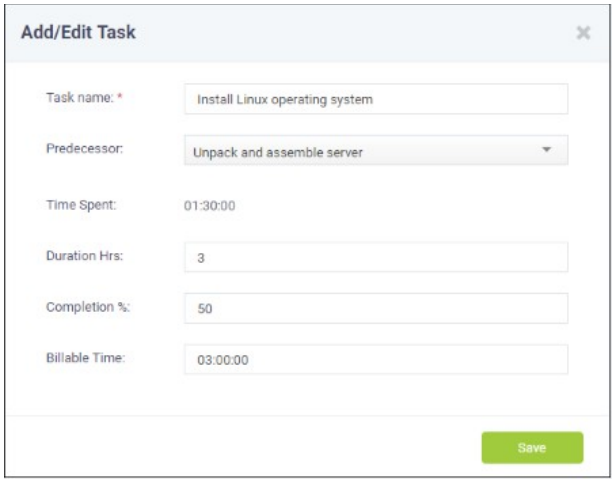
Parent Level Task



- **Task Name** - Displays the name of the task. You can change the name of the task by directly editing the field.

The 'Time Spent', 'Duration Hrs', 'Completion % ' and 'Billable Time' are automatically populated from the sums of the respective values in the child tasks.

Child Level or Terminal Task



- **Task Name** - Displays the name of the task. You can change the name of the task by directly editing the field.
- **Predecessor** - Displays the previous task/sub-task from which the present task has to be continued.
- **Time Spent** - Displays the actual time spent

- Click 'Save' for your changes to take effect

based on the duration hrs and completion percentage entered.

- **Duration** - Allows you to update the time duration required (in hours) to complete the task
- **Completion %** - Allows you to update the completion percentage

The time spent field will be automatically populated from the entered values.

- **Billable Time** - Allows you update the billable time spent on the task
- Click 'Save' for your changes to take effect

The duration and completion percentage will automatically be updated for the parent task to which the child task is linked.

- Click 'Save' in the 'Projects' interface

To update a ticket or a sub-ticket

- Click the pencil icon at the left of the item or double click on the respective bar in the Gannt chart.

The 'Add/Edit Ticket' dialog will appear for the respective task.

- To change the ticket item linked to the task, enter the new ticket number/subject of the ticket in the Search Ticket field.
- To change the Duration, directly enter the new duration in the Duration field
- To change the completion percentage, enter the new completion level in the Completion % field

The 'Time Spent' and 'Billable Time' are fetched from the ticket and are uneditable.

- Click 'Save' for your changes to take effect.

The duration and completion percentage will automatically be updated for the task to which the ticket is linked.

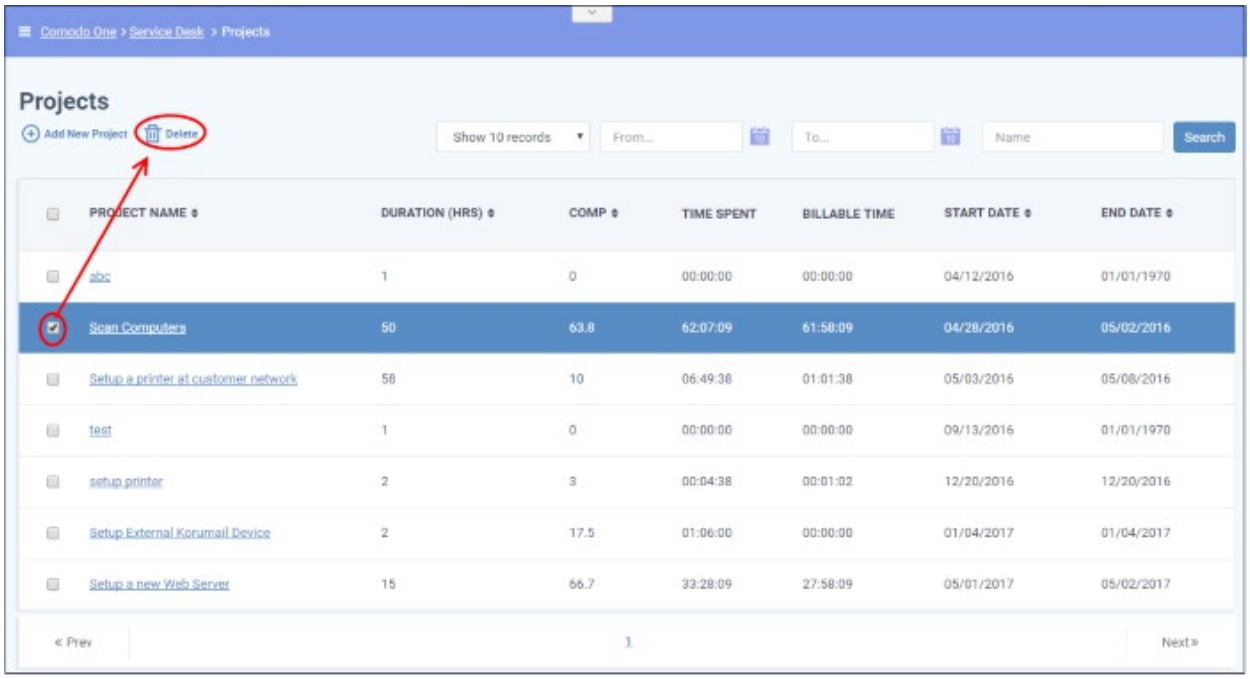
- Click 'Save' in the 'Projects' interface

Removing a Project

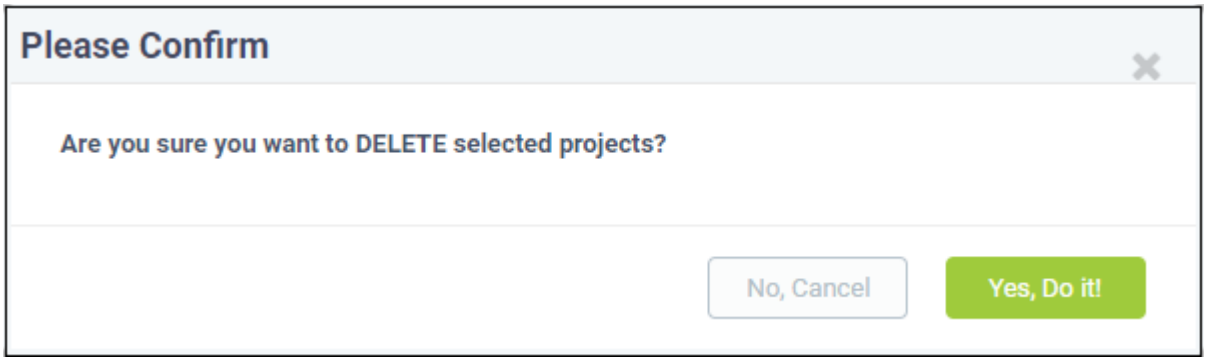
Projects that are completed or no longer required, can be removed from Service Desk.

To remove project(s)

- Open 'Projects' interface by clicking the 'Projects' tab from the 'Staff Panel'
- Select the project(s) to be removed and click 'Delete'



A confirmation dialog will appear.



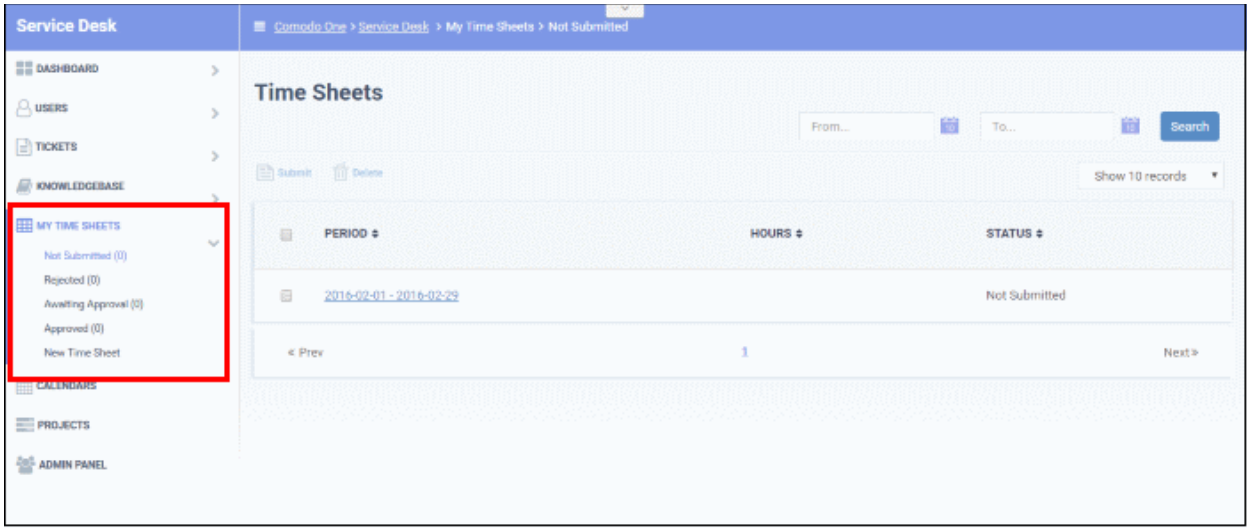
- Click 'Yes, Do it!' to remove the project

2.6 Manage Staff Time Sheets

Service Desk allows staff members to maintain time sheets so that administrators may evaluate their performance and track their working hours.

- Staff can create time sheets for different time periods and can import tasks from tickets they have worked on.
- Completed time sheets can be submitted to administrators for approval.
- In turn, administrators can approve, reject or edit the time sheet. Rejected time sheets can be updated by staff and re-submitted for approval.

To open the time sheets interface, click 'My Time Sheets' on the left in the Staff Panel.



The links under 'My Time Sheet' allow you to filter which time sheets are shown:

- **Not Submitted** - Displays time sheets that are yet to be submitted for administrator approval. These sheets can be updated/edited at anytime and submitted.
- **Rejected** - Displays time sheets that were submitted but rejected by the administrator. Clicking on a time sheet allows you to view administrator notes, edit the sheet and re-submit for approval.
- **Awaiting Approval** - Displays time sheets that were submitted but have yet to receive a response from an administrator. You can only view the sheet but not edit the details
- **Approved** - Displays time sheets that have been approved by an administrator. Clicking on a time sheet allows you to view notes from the administrator and the details in the sheet. You cannot edit or delete the sheets.
- **New Time Sheet** - Allows you to create a new sheet. See **Adding a New Time Sheet** for details.

Column Headers

The column headers are the same for all views:

- **Period** - Displays the date range of the time period covered by the time sheet. Clicking on the date range opens the sheet and allows you to view the entries and update/edit the tasks/time spent. See **Updating a Time Sheet** for more details.
- **Hours** - Total hours spent by you on tickets and other tasks within the time-sheet period.
- **Status** - Indicates the status of the sheet, whether it is yet to be submitted for approval, awaiting for approval, rejected or approved.

Sorting Options

- Click a column header to sort items in ascending/descending order.

Search Options:

You can search for time sheets that fall within a specified date range under the chosen category.

- To search for time sheets enter the 'From' date and 'To' date using the calendar icons beside the respective fields and click 'Search',
- To clear the results and display all items, clear the 'From' and 'To' fields and click the 'Search' button again or simply click the respective category link.

The 'Show records' drop-down on the right allows you to select the number of entries to be displayed per page. The options range from 10 records per page up to 100. You can navigate to different pages by clicking 'Next' and 'Prev'.

The following sections explain more about:

- **Adding a Time Sheet**

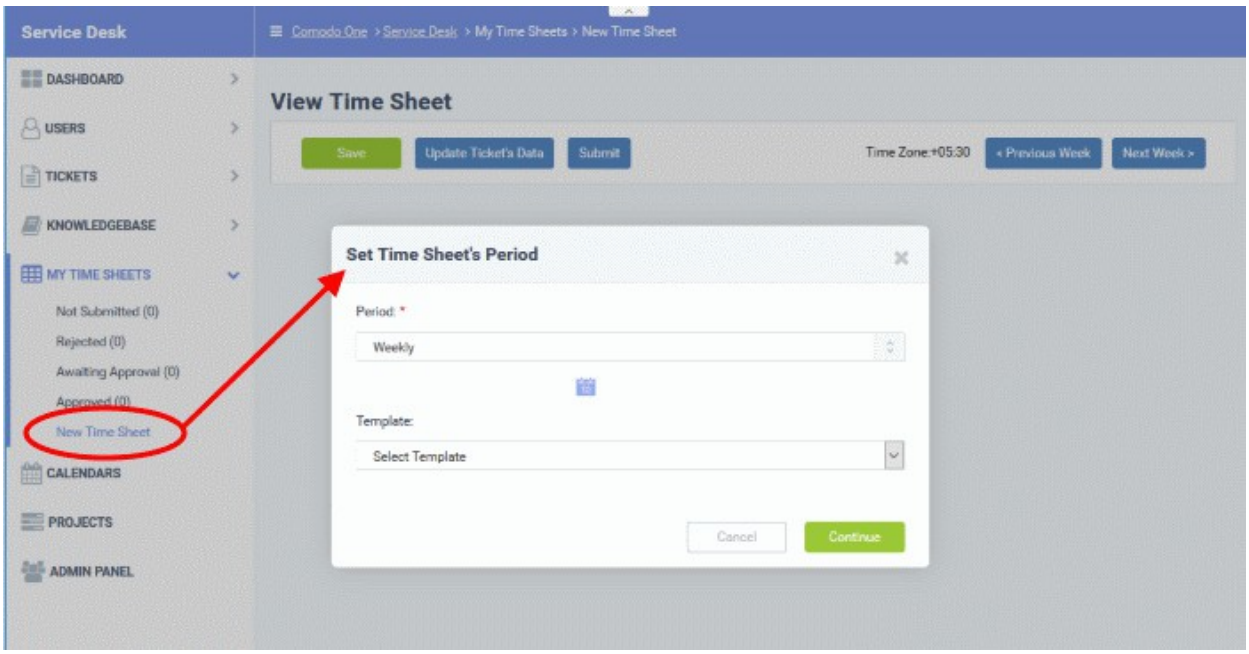
- Updating a Time Sheet
- Submitting a Time Sheet for approval
- Deleting a Time Sheet

Adding a Time Sheet

A staff member can add new time sheet by specifying the time period to be covered. Once created, staff can add tasks they have attended to and the time spent on them. The sheet can then be submitted to an administrator for approval.

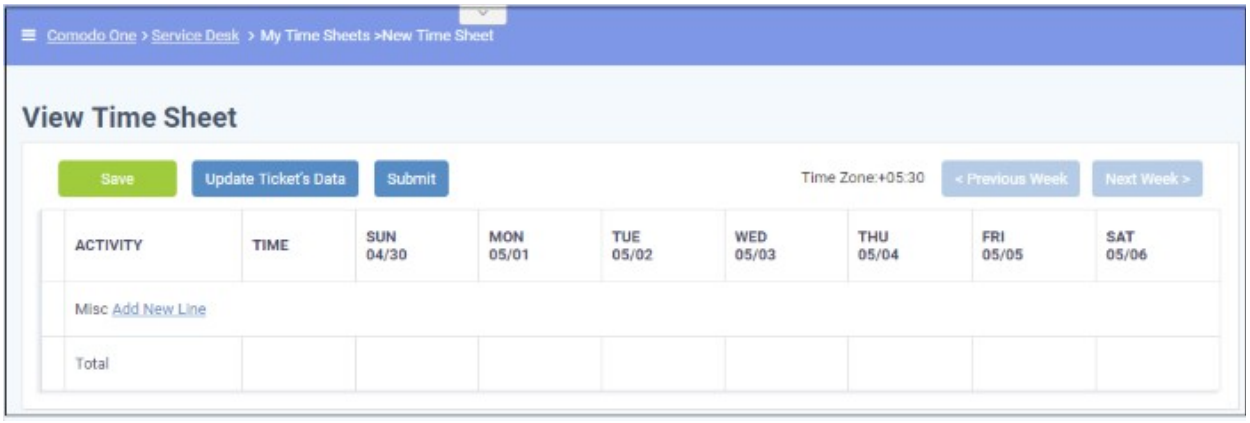
To add a new time sheet

- Click 'New Time Sheet' link from the 'My Time Sheets' section



- Select the period from the 'Period' drop-down. The available options are:
  - Weekly - Allows you to select current week or any previous/forth coming week starting from Sunday to Saturday, by clicking the clicking the calendar icon beside it.
  - First Half of Month - Allows you to include the first fortnight of the current month or any month.
  - Second Half of Month - Allows you to include the second fortnight of the current month or any month.
  - Monthly - Allows you to include a full month from 1st to 30th/31st of the current month or any month.
  - Click 'Done' after selecting your preferred period.

- Select the time sheet template, if required, from the 'Template' drop-down. The templates that are available here are configured in the Admin panel under 'Staff' > 'Timesheet Templates'
- Click 'Continue' after selecting the template (if required) and date range to be covered by the sheet.



A new sheet will be added for the date range with a status of 'Not Submitted'. You can update activities on the sheet and click 'Save'. See **Updating Time Sheet** for more details.

Updating a Time Sheet

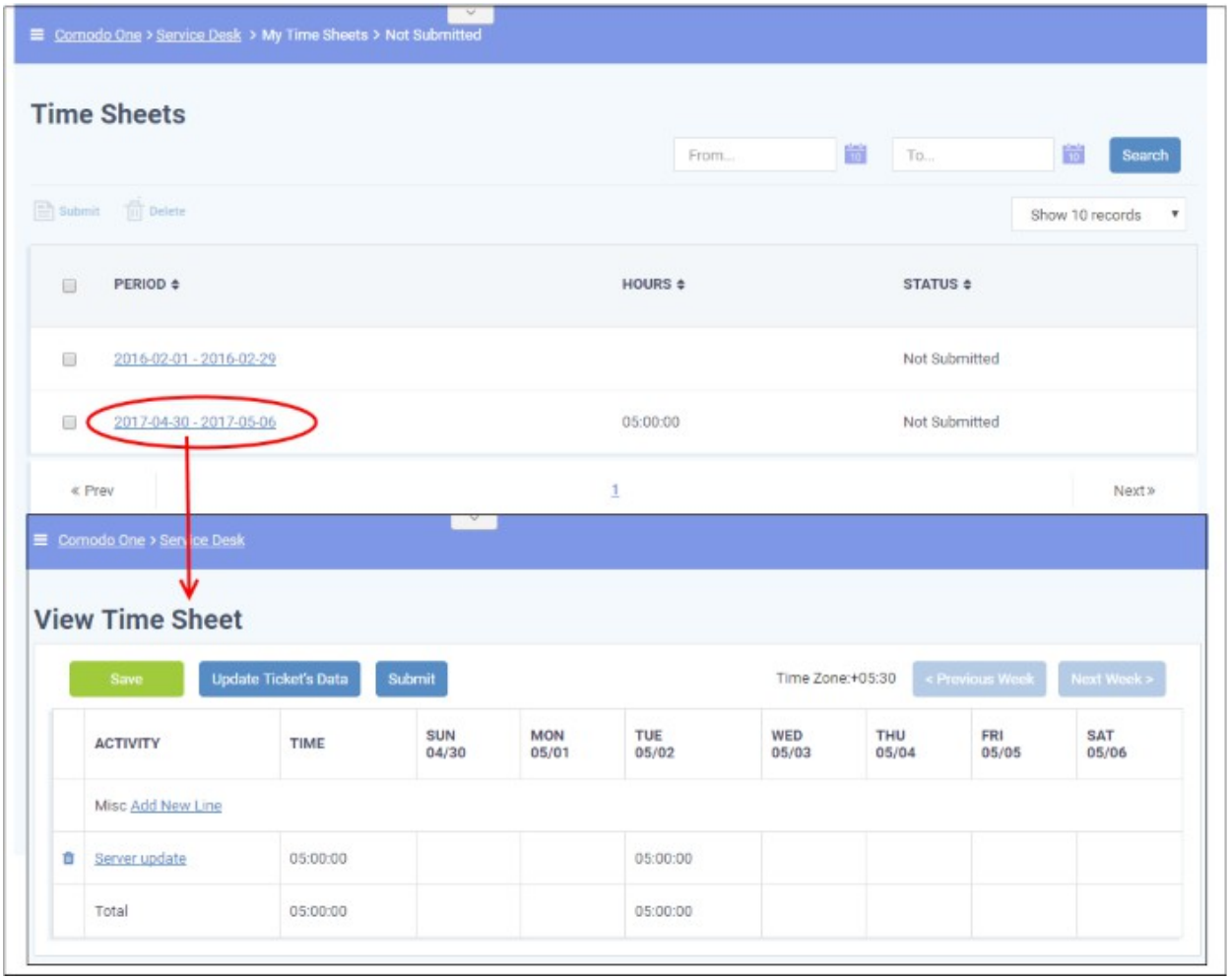
Staff can add tasks and time spent to a time-sheet in two ways:

- Import details from tickets they have worked on
- Manually add tasks and time spent

To update a time sheet

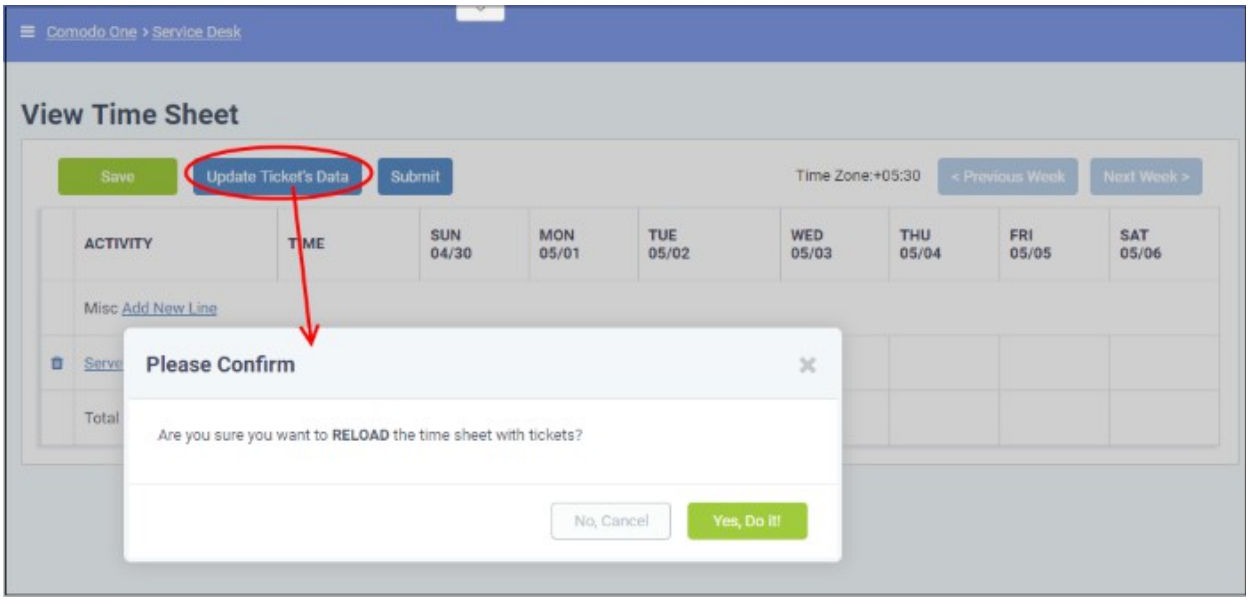
- Open the 'Time Sheets' interface by clicking 'My Time Sheets' from the Staff Panel
- Click the time sheet category to be updated

Note: Only the time sheets under the 'Not Submitted' and 'Rejected' categories can be edited.



The edit time-sheet screen will open. This displays each activity on a separate row along with the total time spent on an activity and the time spent per day on an activity. The screen displays the first week within the period by default. To view details about other weeks, use the 'Previous Week' and 'Next Week' buttons at the top.

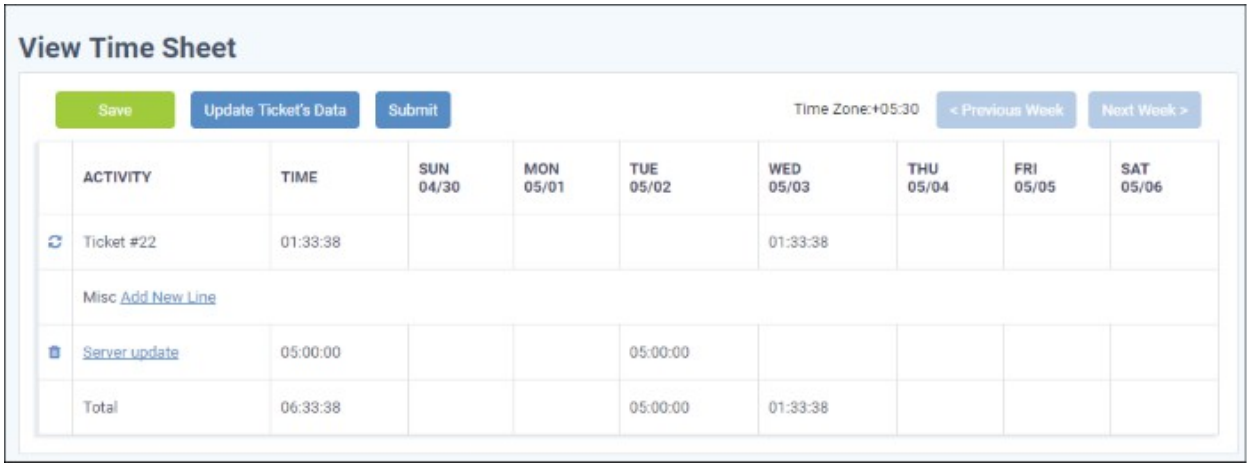
- To import the tickets you worked on and time spent, within the time period, click he 'Update Ticket's Data' button.



- Click 'Yes, Do it!' in the confirmation dialog

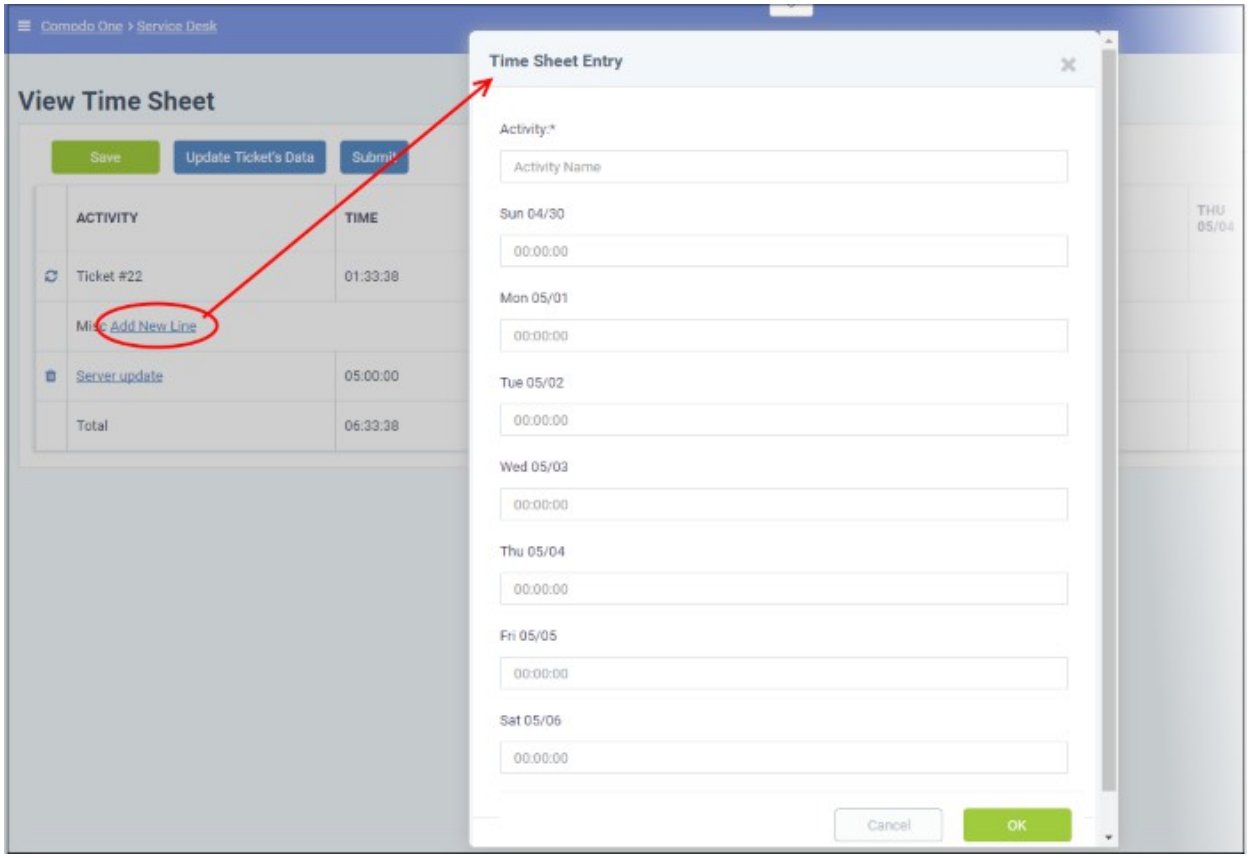
The sheet will be automatically updated with all tickets and time spent covered by the time sheet period. You can

repeat this process during the time period to update the sheet with the latest details.



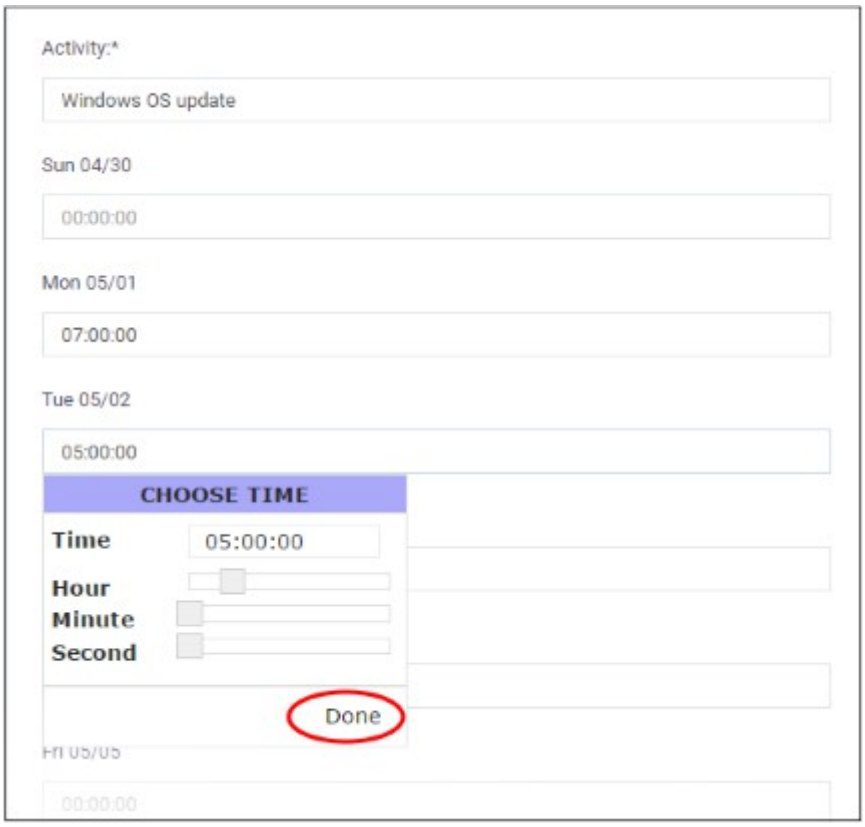
- Click Save for your changes to take effect

- To manually add an activity, click 'Add New Line'



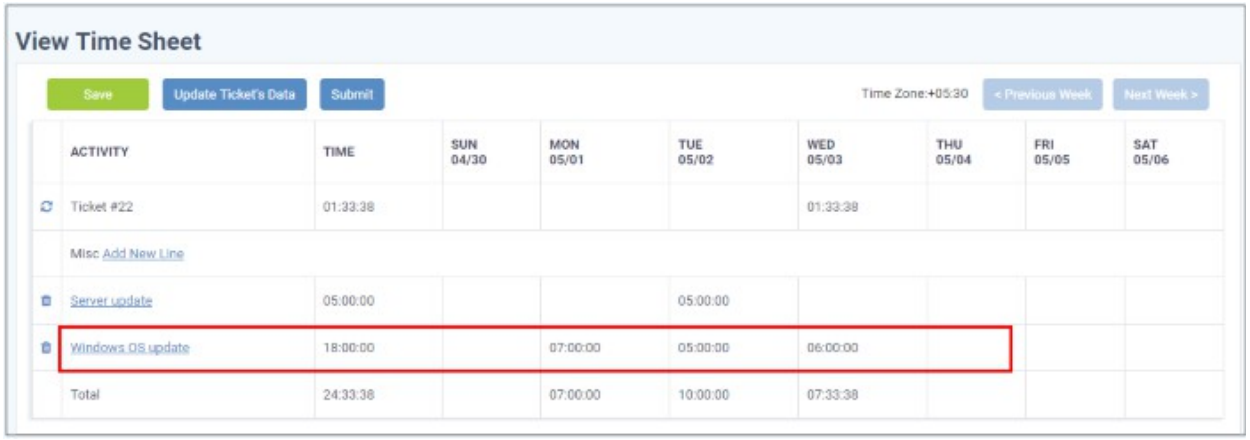
The 'Time Sheet Entry' dialog will appear.

- Enter the name of the Activity in the Activity field
- Enter the time spent on the activity on a day, by clicking inside the field below the day and selecting the hours, minutes and seconds from respective sliders.



- Click 'Done'.
- Repeat adding the time for each day you worked on the same activity
- Click 'OK' in the 'Time Sheet Entry' dialog.

The activity will be added to the list.



- Click 'Save' for your changes to take effect

You can update the activity at any time by clicking on it.

- To remove an activity, click the trash can icon beside it.
- To submit the sheet for administrator approval, click the 'Submit' button from the top

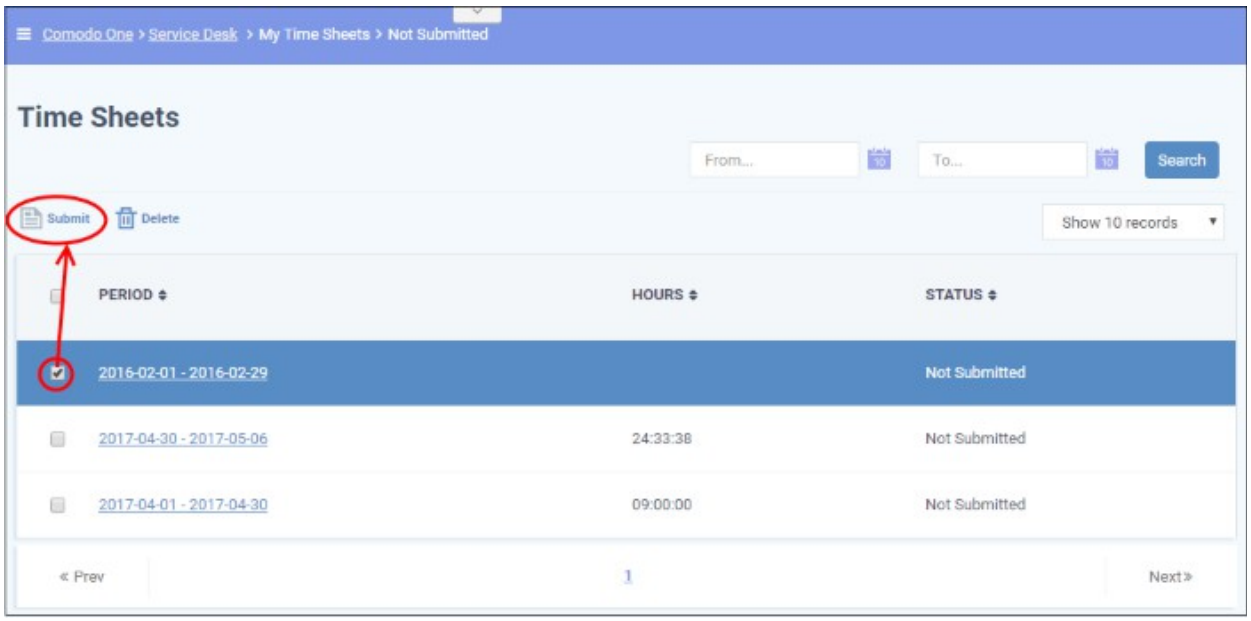
Submitting a Time Sheet for Approval

Staff members can forward completed time sheets for approval by the administrator. Once submitted, the time sheet will move to the 'Awaiting Approval' category. The administrator can accept or reject the time sheet and can leave comments. You can view approved or rejected time sheets by looking under the respective category. Rejected time sheets can be updated and re-submitted for approval.

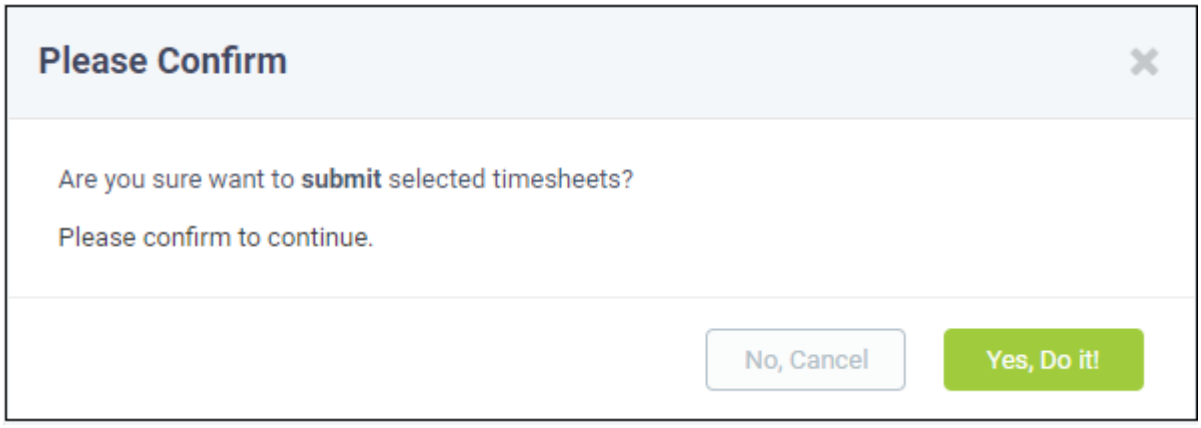
Note: Only 'Not Submitted' and 'Rejected' time sheets can be submitted for approval.

To submit time sheet(s)

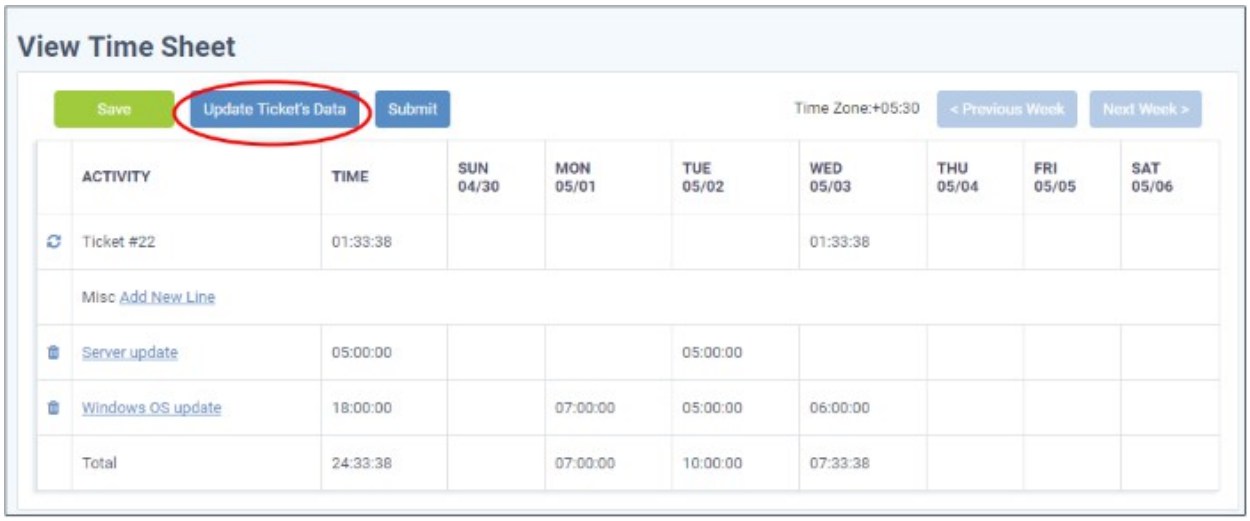
- Click 'Not Submitted' on the left under 'My Time Sheets' in the staff panel
- Select the time sheet(s) to be submitted and click 'Submit'



A confirmation dialog will appear.



- Click 'Yes, Do It!' in the confirmation dialog.
- Alternatively, to submit a single sheet, open the sheet by clicking on it and click 'Submit' from the top.



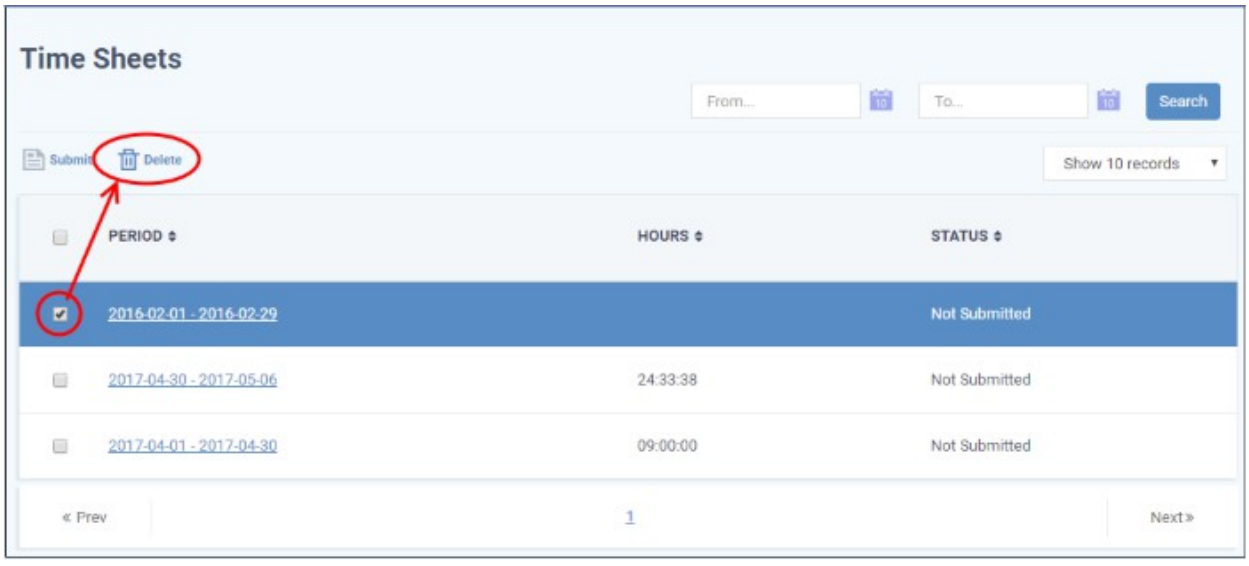
Deleting a Time Sheet

Time sheets that are no longer needed, can be removed from the list by the staff member.

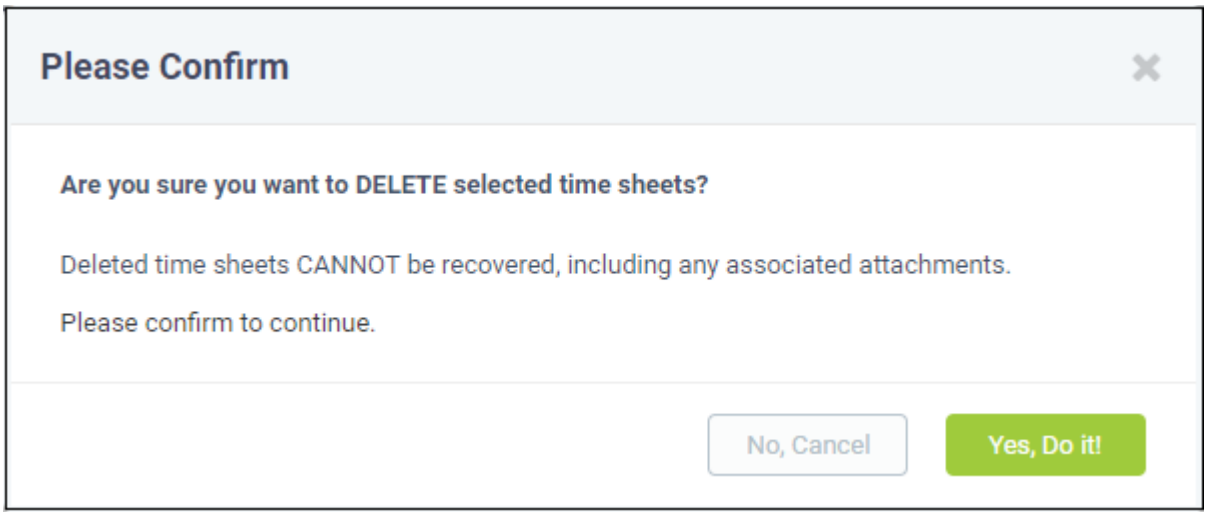
Note: Only the time sheets under Not Submitted and Rejected categories can be removed.

To remove time sheet(s)

- Click 'Not Submitted' or 'Rejected' on the left under 'My Time Sheets' in the staff panel
- Select the time sheet(s) to be removed and click 'Delete'



A confirmation dialog will appear.



- Click 'Yes, Do It!' in the confirmation dialog.

2.7 Manage Calendars

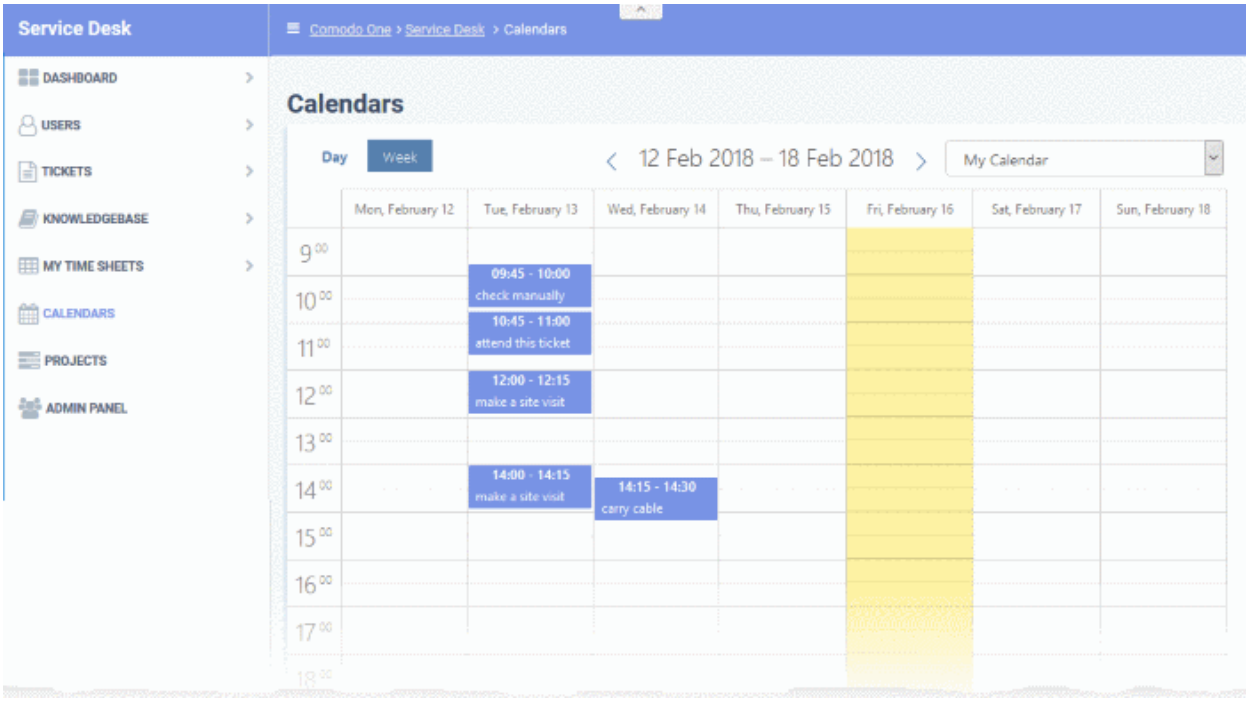
Service Desk allows staff members to manage appointments and schedule events on their calendars.

- There are two ways to add schedules and appointments to your calendar:
  - Manual - Add an appointment to your calendar.
  - From Tickets - Future tasks can be added when creating or working on tickets. For example, you could create a schedule for task that involves an on-site visit. For more details, see **Create a Schedule for the Ticket** in the section **Ticket Details**.
- Calendar entries and appointments can be shared among admins/staff members. This is useful when collaborating on tasks.
- You can also view and manage the calendars of other staff in order to create better and more transparent workflows.

To view the calendars interface

- Open the 'Staff' panel (see last link on the left)
- Click 'Calendars' on the left

  - The current week will be displayed by default. You can view the current week or day by clicking the respective button above the calendar.
  - To move to previous/next week/day, use the '<' and '>' buttons above the table.

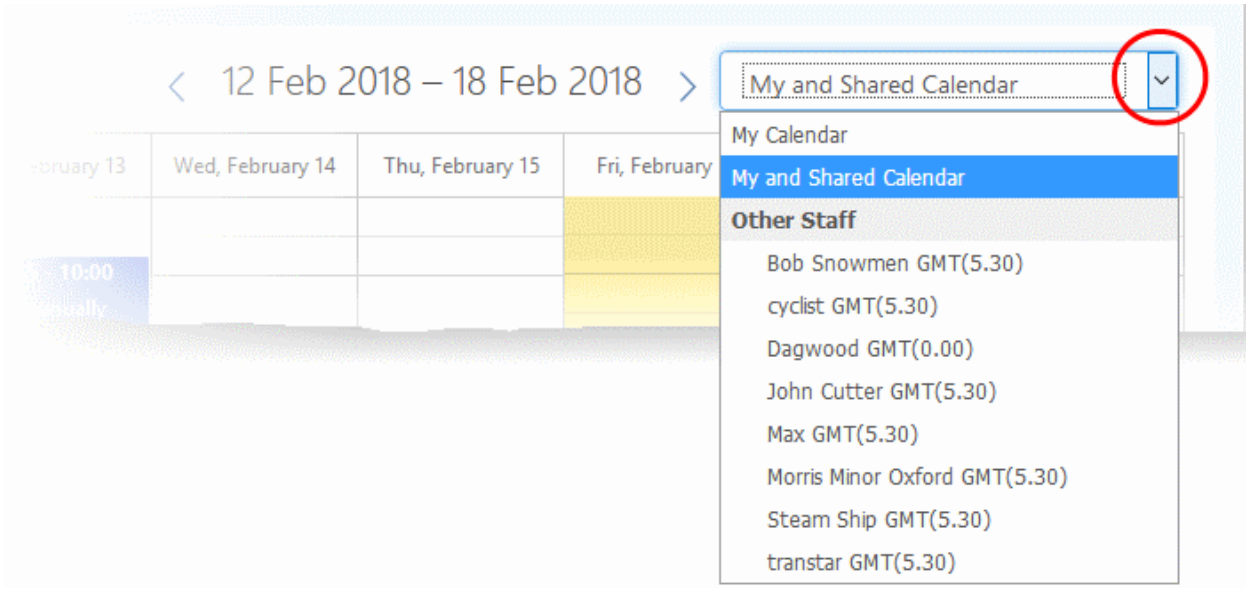


The following sections explain more about:

- **View calendars**
- **Create a manual calendar entry**
- **View details and manage a calendar Entry**

View Calendars

The drop-down at the top-right allows you to select the admin/staff whose calendar you want to view.



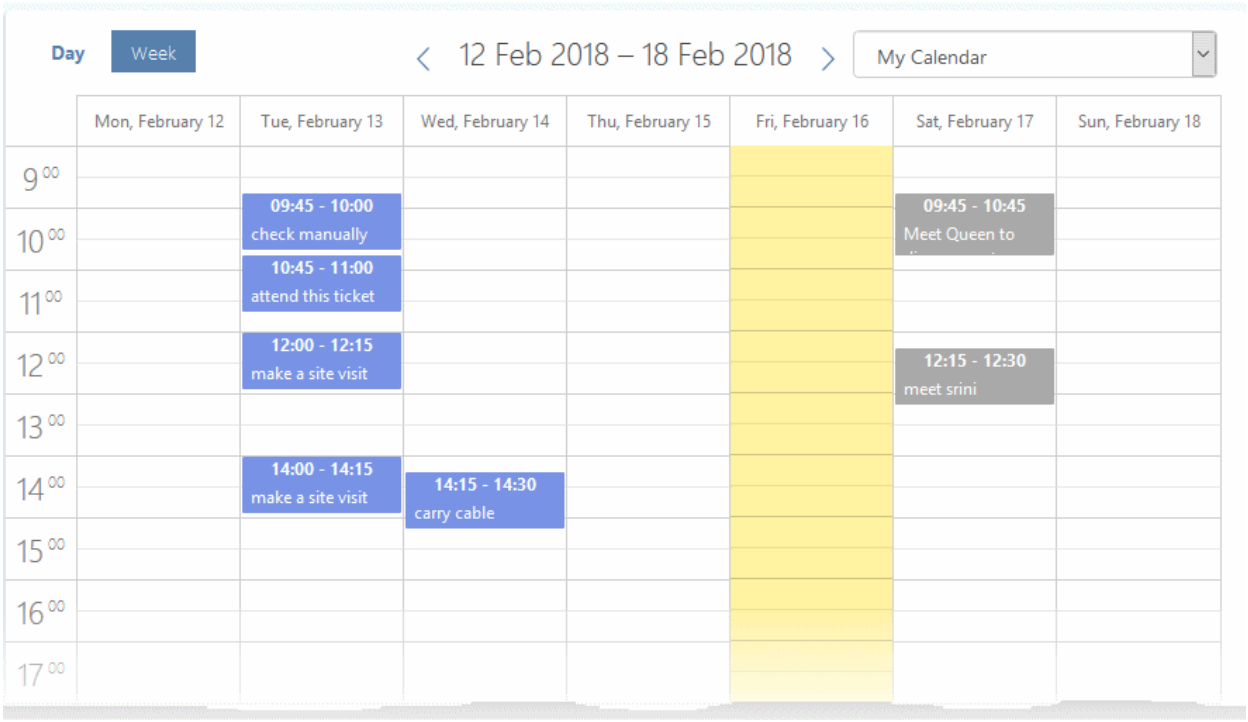
- My Calendar - Displays calendar events scheduled for you. The entries include:
  - Events manually added by you
  - Scheduled events created in tickets assigned to you
  - Events scheduled for you by admins and other staff members

- My and Shared Calendar - Events scheduled for you as above and other peoples events marked as shared.
  - Blue background - Events scheduled for you
  - Gray background - Shared events
- Other Staff - Choose the staff member whose calendar you want to view. You will be able to create and view details of existing events for the staff member. See the following sections for more details.

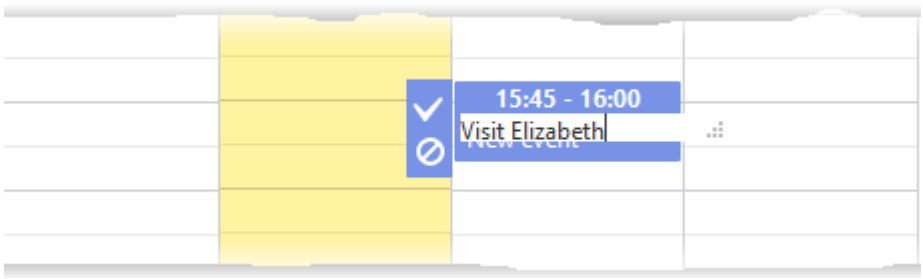
Create a Manual Calendar Entry

You can schedule events for yourself and other staff members:

- Choose 'My Calendar' from the drop-down at top-right to create an event for yourself
- Alternatively, choose a staff member under 'Other Staff' to create an event for someone else



- Double-click on the time-slot which you wish to schedule for the ticket



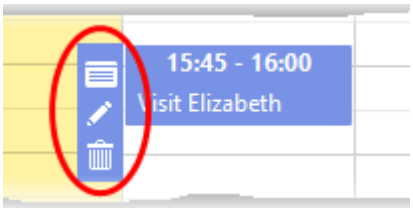
- Enter a short description of the task
- Click the tick mark to save the entry
- To share an event with others:
  - Click on the event
  - Click the 'Edit' icon that appears on the left (the top icon of the three)
  - Enable the 'Shared' check-box
  - Click 'Save'. See View Details and Manage a Calendar Entry if you need more help with this.

View Details and Manage a Calendar Entry

Calendar entries belonging to you and others can be edited to change the description, associate tickets, change the date/time, mark it as shared and more.

To view/manage details of a calendar entry

- Choose 'My Calendar' or 'My and Shared Calendar' from the drop-down at the top-right
  - Or choose another staff member from 'Other Staff'
- Click on the event to be viewed/managed



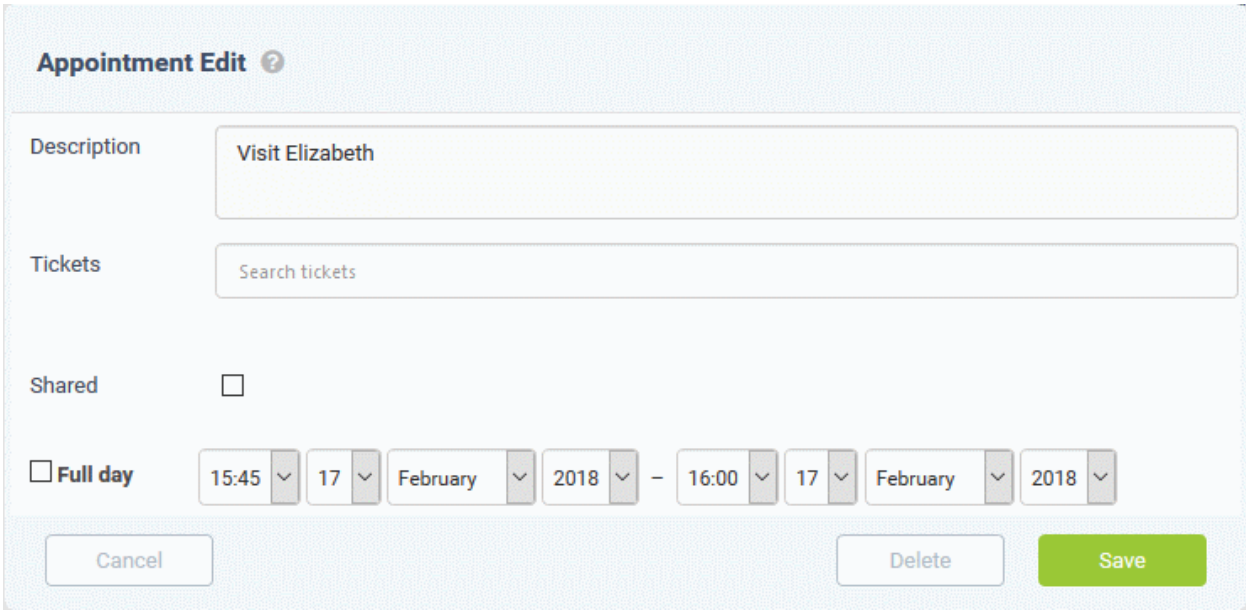
Three options will appear on the left of the entry:

	Edit dialog. Allows you to: • View and modify event description • Associate tickets with the event • Share or unshare the event • View and change the scheduled time of the event See **Edit details of the calendar entry** for more details
	Edit the description of the event.
	Remove the event

Edit details of the calendar entry

- Click the 'Details' icon to view and manage details of the ticket.

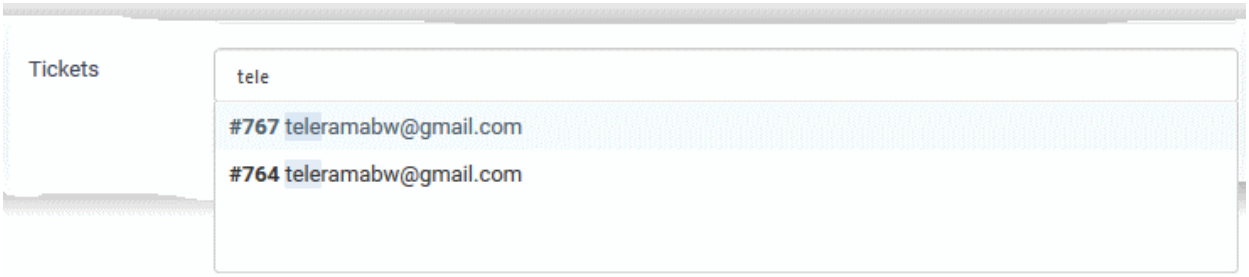
The 'Appointment Edit' dialog will appear:



- Description - Information about the event. You can change the description if required.
- Tickets - View tickets associated with the event and add new tickets. This is optional. You can add

multiple tickets to a calendar entry.

- Start typing the first few letters of the ticket number, username/email of the user that created the ticket or the subject of the ticket.
- Select the ticket you want to associate with the event from the search results:



- Repeat the process to add more tickets

- Shared - Makes the event visible to all admins/staff members when they select 'My and Shared Calendar' from the drop-down.
- Time Period - Displays the date/time of the event.
  - To change the date/time of the event, simply change the values in the the drop-downs.
  - Select 'Full day' if you expect the event to last the full working day.

- Click 'Save' after making you changes

About Comodo Security Solutions

Comodo Security Solutions is a global innovator of cybersecurity solutions, protecting critical information across the digital landscape. Comodo provides complete, end-to-end security solutions across the boundary, internal network and endpoint with innovative technologies solving the most advanced malware threats. With over 80 million installations of its threat prevention products, Comodo provides an extensive suite of endpoint, website and network security products for MSPs, enterprises and consumers.

Continual innovation and a commitment to reversing the growth of zero-day malware, ransomware, data-breaches and internet-crime distinguish Comodo Security Solutions as a vital player in today's enterprise and home security markets.

About Comodo Cybersecurity

In a world where preventing all cyberattacks is impossible, Comodo Cybersecurity delivers an innovative cybersecurity platform that renders threats useless, across the LAN, web and cloud. The Comodo Cybersecurity platform enables customers to protect their systems and data against even military-grade threats, including zero-day attacks. Based in Clifton, New Jersey, Comodo Cybersecurity has a 20-year history of protecting the most sensitive data for both businesses and consumers globally. For more information, visit comodo.com or our **blog**. You can also follow us on **Twitter** (@ComodoDesktop) or **LinkedIn**.

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