

COMODO
Creating Trust Online®



Comodo One

Software Version 3.29

Service Desk Staff Guide

Guide Version 4.19.011819

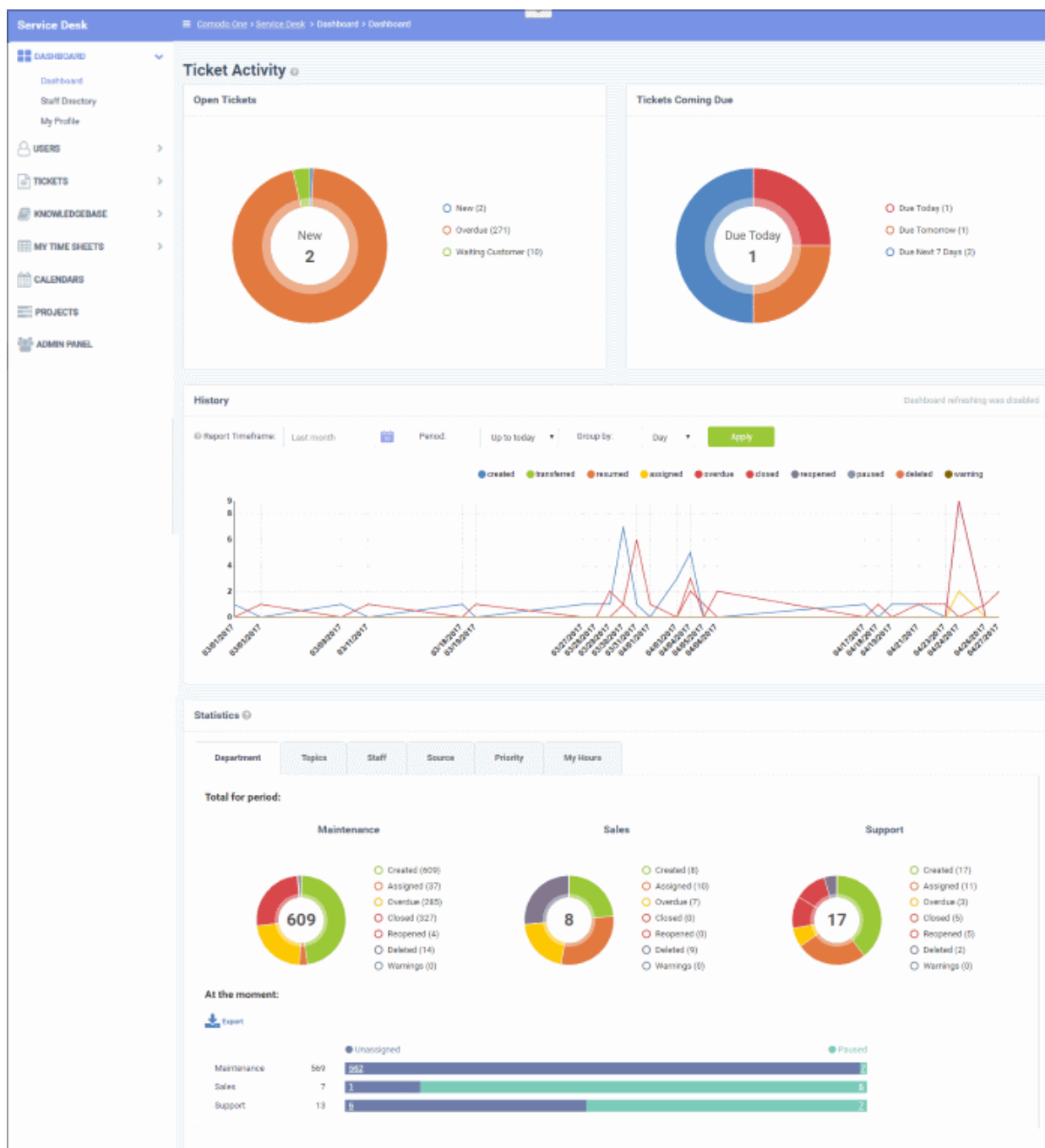
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1 Introduction to Service Desk Module

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 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 Gantt 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:
 - An organization does not have a contract
 - The contract with an organization 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 assigned to contracts. 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**
 - **Logging-in to the Service Desk Module**
- **Service Desk Staff Panel**
 - **Staff Panel Dashboard**
 - **Manage Users and Organizations**
 - **Manage Tickets**
 - **Manage Knowledgebase**
 - **Manage Projects**
 - **Manage Staff Time Sheets**
 - **Manage Calendars**

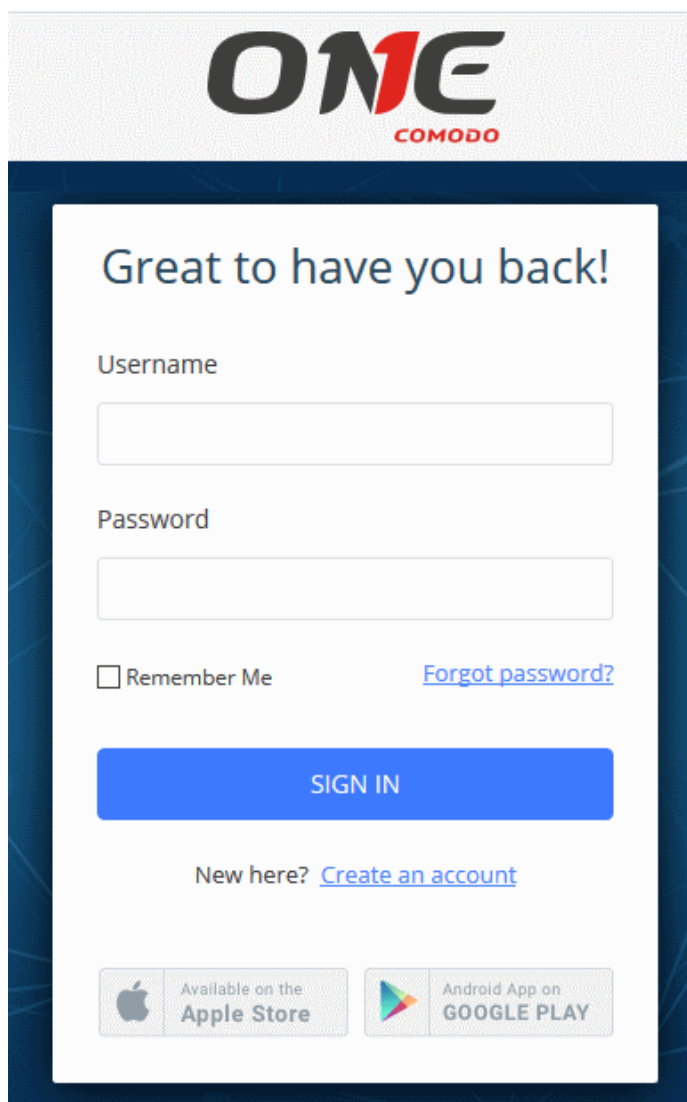
1.1 Quick Start

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 Admin Console**
- **Step 2 - Enroll Users**
- **Step 3 - Assign Users to Organizations and creating new Organizations**
- **Step 4 - Create service contracts for Organizations**
- **Step 5 - Manage Tickets**
- **Step 6 - Manage the Knowledgebase**
- **Step 7 - Manage Your Time sheet**

Step 1 - Login to the Admin 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'

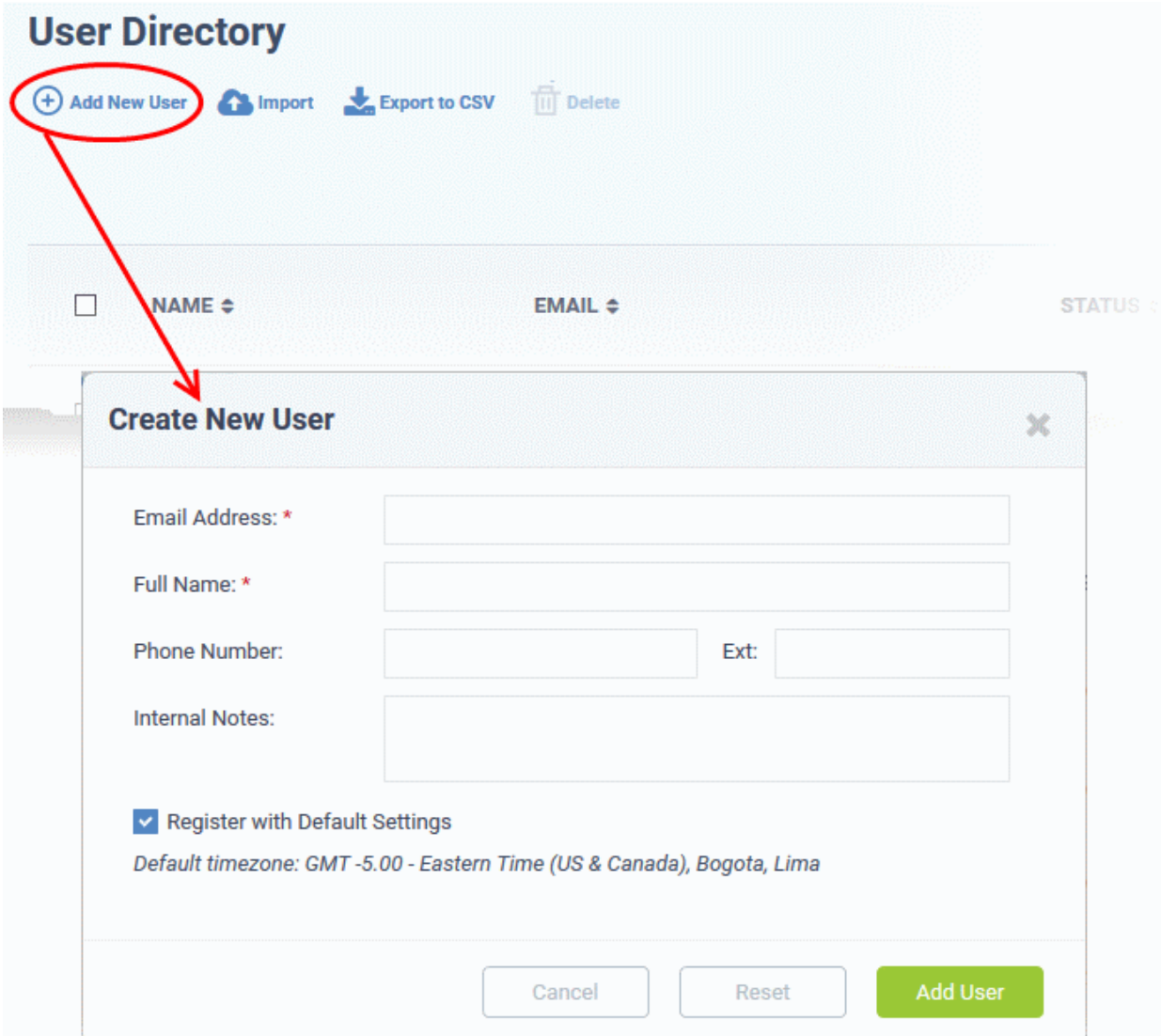
By default, Service Desk will open at 'Staff Panel' > 'Open Tickets'.

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, whether self-enrolled or manually enrolled, can be added to organizations 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:

To enroll new users

- Open the 'Staff Panel' if it isn't open already (last link in the left-hand menu)
- Click 'Users' then select 'User Directory'
- Click the 'Add New User' link at the top

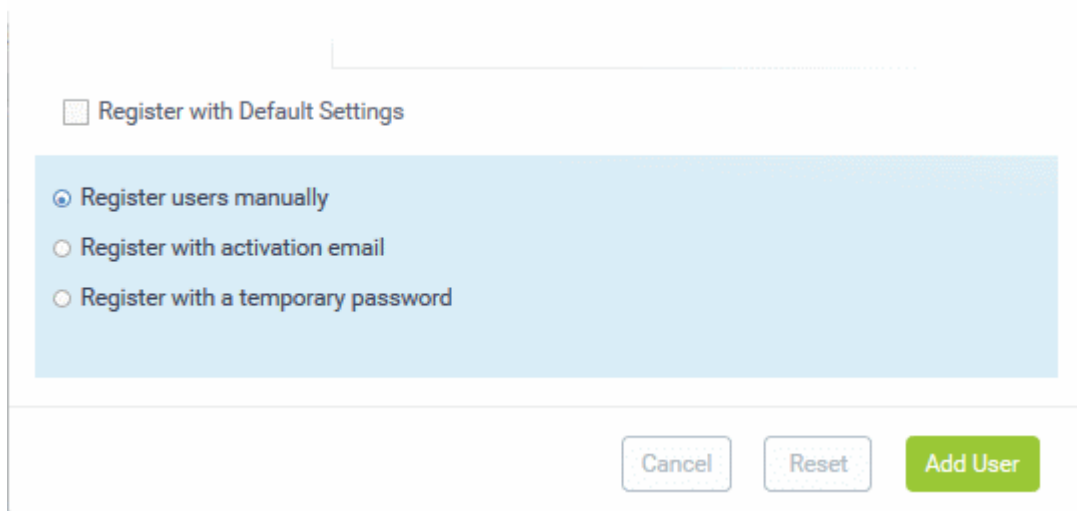


The screenshot displays the 'User Directory' interface. At the top, there are four action buttons: '+ Add New User' (circled in red), 'Import', 'Export to CSV', and 'Delete'. Below these buttons is a table header with columns for 'NAME', 'EMAIL', and 'STATUS'. A modal window titled 'Create New User' is open, containing the following fields and options:

- Email Address: *** (text input)
- Full Name: *** (text input)
- Phone Number:** (text input) and **Ext:** (text input)
- Internal Notes:** (text area)
- Register with Default Settings**
- Default timezone: GMT -5.00 - Eastern Time (US & Canada), Bogota, Lima*

At the bottom of the modal are three buttons: 'Cancel', 'Reset', and 'Add User'.

- **Email Address:** User's email 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 with Default Settings

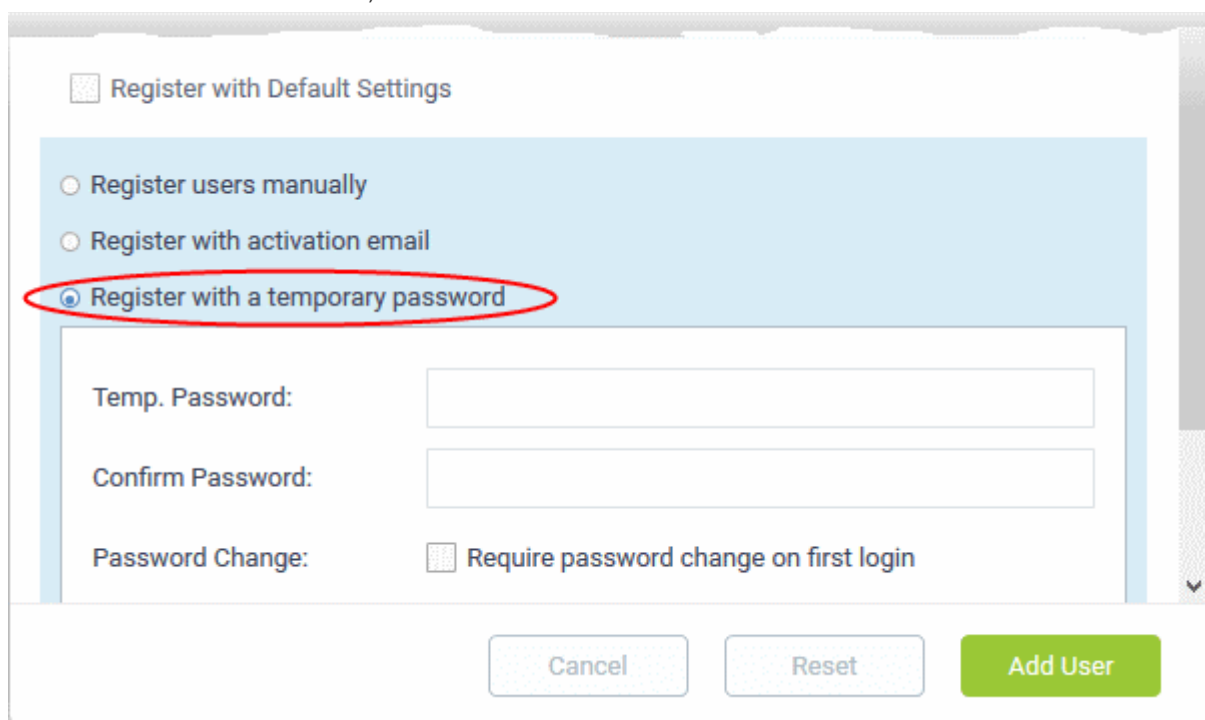
Register users manually

Register with activation email

Register with a temporary password

Cancel Reset Add User

- **Register users manually** - Register by selecting a user in the 'User Directory' area and clicking the 'Register' button.
- **Register with activation email** - An enrollment mail is sent to new users with an account activation link. The link takes the user to your support web portal to create a password. Once registered, the user will be able to login to your support portal to manage/view their tickets.
- **Register with a temporary password** - Enter a temporary password for the new user (as shown below)



Register with Default Settings

Register users manually

Register with activation email

Register with a temporary password

Temp. Password:

Confirm Password:

Password Change: Require password change on first login

Cancel Reset Add User

- 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

Once registered, you should communicate the URL of your web-portal and the password to the user. Users can login using their email as user name, along with the password that 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.

- Click 'Add User'.

The user will be added as a guest user or registered user depending on the account registration. Once registered,

you can manage their account and assign them to an organization.

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 Organizations** for more details.

Step 3 - Assign Users to Organizations and create new Organizations

An organization is a customer entity, 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 organizations from both the 'Organizations' and 'User Directory' interfaces.

There are two options to create an organization:

- **Create an organization in the Comodo One Interface (*preferred*)**

Organizations that are added to C1 are fully managed, meaning they will be available for selection in all integrated modules (Service Desk, RMM, Patch Management and ITSM).

To create a company in C1, click 'Management' > 'Customer' > 'New Customer'. Please note, only administrators with appropriate privileges can add new customers.

- **Create an organization in Service Desk.**

Organizations created in Service Desk itself will not be visible in the C1 interface nor available to other C1 modules.

To create an organization in Service Desk, click 'Staff Panel', > 'Users' > 'Organizations' > 'Add New Organization'.

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

To assign users to an organization

- Click 'Users' then 'User Directory' on the left

The list of users will be displayed.

- Click the user name that you want to assign an organization

In the user details interface, click the link 'Add Organization'

The screenshot shows the 'User Page' for a user named 'Feller'. The user's details are: Name: Feller, Email: relief@yopmail.com, Status: Active (Registered), Created: 05/10/2017 12:38 pm, and Updated: 05/10/2017 12:38 pm. The 'Organization' field is currently empty and has a link labeled 'Add Organization' which is circled in red. A red arrow points from this link to a modal window titled 'Organization for Feller'. This modal window contains a search bar with the text 'Search existing organizations.' and a search input field labeled 'Search by name'. Below the search bar is a section titled 'Create New Organization: Details on user organization' with the following fields: Name: * (required), Web Domain: * (required), Address, Phone, Ext, Website, and Internal Notes. At the bottom of the modal are three buttons: 'Cancel', 'Reset', and 'Add Organization'.

In the 'Organization for <user name>' screen, search for the organization in the search field.


You can assign the user to an existing organization, or create a new Organization and add the user to it.

- To add the user to an existing Organization, type the first few letters of the Organization name in the search field. After choosing an Organization, following confirmation dialog will appear:

Organization for Feller [X]

i Search existing organizations.

Search by name

 **ACME Corp.**

Organization Information

Web Domain: acmecorp.net

Address: Green Mountain Side, Alabama.

Phone:

Website: acmecorp.com

Internal Notes: Ammunition Business

Continue

- Click 'Continue'.

The user will be added to the organization and will be displayed in the 'User Details' screen.

- To add a new organization, enter the details of the organization under 'Create New Organization: Details on User organization'.

Organization for Feller [Close]

i Search existing organizations.

Search by name

Create New Organization: Details on user organization

Name: *

Web Domain: *

Address:

Phone: Ext:

Website:

Internal Notes:

See '[Managing Companies](#)' and '[Managing Organizations](#)' for more details about the details to be entered on adding a new organization.

- Click 'Add Organization'

The new organization will be added to Service Desk and the user will be added to the new organization.

To add a new organization in Service Desk

Reminder. If you add an organization via the service desk interface, it will not be visible in the C1 interface nor available to other modules like ITSM. The preferred method is to add an organization via the C1 interface as explained above.

To add a new organization in service desk:

- Click 'Users' on the left then 'Organizations'
- Click the 'Add New Organization' link at the top

The screenshot shows the 'Organizations' page in the Comodo One interface. The breadcrumb trail is 'Comodo One > Service Desk > Users > Organizations'. The page title is 'Organizations'. There are three main actions: '+ Add New Organization' (circled in red), 'Export to CSV', and 'Delete'. A dropdown menu shows 'Show 10 records'. Below this is a table with columns 'NAME', 'USERS', and 'CREATED'. A modal form titled 'Add New Organization' is open, containing a message: 'Complete the form below to add a new organization.' The form is titled 'Create New Organization: Details on user organization' and includes the following fields: 'Name: *', 'Web Domain: *', 'Address:', 'Phone:' (with an 'Ext:' field), 'Website:', and 'Internal Notes:'. At the bottom of the modal are 'Cancel', 'Reset', and 'Add Organization' buttons.

The 'Add New Organization' screen will open:

- **Name:** Enter the name of the organization.
- **Web Domain:** Enter the registered domain name of the organization.
- **Address:** The address of the organization.
- **Phone:** The contact number of the organization.
- **Website:** The URL of the organization's website.
- **Internal Notes:** Enter any notes regarding the organization.

After completing the form, click the 'Add Organization' button. Staff members can now configure the organization's

settings, users and billing rates. See '[Managing Organizations](#)' for more details.

Step 4 - Create Service Contracts for Organizations

Service contracts allow you to specify billing rates, contracted hours and fees for your customer organizations. Tickets that you work on for the organization will reference the rates specified in the contract.

Each contract contains:

- A contract fee (weekly/bi-weekly/monthly/yearly)
- Pre-paid service hours per billing cycle. These hours are covered by the fee. (optional)
- A charging plan which bills custom rates for work on specific assets (e.g. printers, laptops, mysql etc), or work of a specific type (telephone, on-site, remote). (optional)

Time spent on tickets for the organization which fall within the number of pre-paid hours will be covered by the contract fee.

- Hours which exceed the pre-paid hours will be charged at the rates in the specified in the charging plan assigned to the contract.
 - Charging plans can be created and managed from the admin panel ('Admin Panel' > 'Manage' > 'Charging')
- If no charging plan exists for the contract then global asset rates specified in the default charging plan are consulted.
 - The default charging plan can be managed in the 'Admin Panel' > 'Manage' > 'Charging' interface.

For a complete understanding of charging, see [How charging works in Service Desk](#)

For more details on contracts, see [Manage Contracts](#).

To create a contract:

- Click 'Admin Panel' > 'Finance' > 'Contracts', in the left-hand menu
- Click 'Add Contract' at the top

The 'New Contract' form will open.


New Contract


General Information

Contract Name: *

Company: *

Contract Details:

Start Date: * 

End Date: * 

Contract Parameters

Fee:

Billing Period:

Unused Hours:

Prepaid Hours will be calculated according to the number written on the field next to service types.

Prepaid Hours: Unlimited

Distribute prepaid hours to service types

Onsite: Unlimited

Remote: Unlimited

Telephone: Unlimited

Charging Method

Charging: Not now

- Complete the form as follows:

General Information

- **Contract Name** - Enter a short label for the contract. For example, you may want to name the contract after the company it is for.
- **Company** - Choose the customer who the contract is for.
- **Contract Details** - Enter a short description of the contract
- **Start Date** - Click the calendar icon to specify the date from which the contract is effective
- **End Date** - Click the calendar icon to specify the date the contract ends

Contract Parameters

- **Fee** - Enter the subscription fee for the services you provide (optional).
 - This fee will always be charged, regardless of other charges in charging plans and global asset rates.
 - You may wish to set a fee then use 'Prepaid Hours' to specify the amount of work that will be covered by the fee.
 - If no fee is specified, then no recurring fee is charged to the customer. You can still set hourly rates for the customer by adding a charging plan, or by using global asset rates to define your charges.
- **Billing Period** - The billing cycle at which you will charge the contract fee (if any). The available options are:
 - Weekly
 - Bi-Weekly
 - Monthly
 - Yearly
 - Any prepaid hours that you define are tied to the billing period that you choose.
- **Unused Hours** - Choose whether or not any remaining pre-paid hours at the end of a billing period should be carried over to the next period. Hours that are carried forward will be added to the pre-paid hours of the same service type in the next billing cycle.
- **Prepaid Hours** - Hours worked by your staff during this period that will not be charged to the customer. You can distribute pre-paid hours over different support service types if required (including on-site, remote and telephone support).

Prepaid Hours will be calculated according to the number written on the field next to service types. ?

Prepaid Hours:	<input type="text"/>	<input type="checkbox"/> Unlimited ?
	<input type="checkbox"/> Distribute prepaid hours to service types	
Onsite:	<input type="text"/>	<input type="checkbox"/> Unlimited ?
Remote:	<input type="text"/>	<input type="checkbox"/> Unlimited ?
Telephone:	<input type="text"/>	<input type="checkbox"/> Unlimited ?

- **Prepaid Hours** - Total hours you want to provide for the contract fee. Your customer can spend these hours on support of any type.
 - Unlimited – Provide support of any type for free for the full billing period
- OR
- **Distribute prepaid hours to service types** - Specify pre-paid hours for individual service types.
 - Unlimited – Provide support of a specific type for free for the full billing period

Note: If 'Unused Hours' option is set to 'Carry forward' then the remaining pre-paid hours of each service type will

be carried forward to the next billing period for the respective service type.

Charging Method

- **Charging** - Select a 'Charging plan' for the contract. If you do not want to choose a charging plan at this moment, select 'Not now'.
 - Charging plans allow you to set a default hourly rate, and custom hourly rates for specific types of work.
 - Charging plans only kick in after any prepaid hours have been used up.
 - Charging plans can be created and added to contracts by going to 'Admin Panel' > 'Manage > 'Charging'.
 - For more details on charging plans, see <https://help.comodo.com/topic-289-1-625-12458-Manage-Charging-Plans.html>.
 - If you do not apply a charging plan then global asset rates will be applied for sessions that exceed the pre-paid hours.
 - Global asset rates can be defined in 'Admin Panel' > 'Assets' > 'Manage'. For more details on global rates, see <https://help.comodo.com/topic-289-1-625-7842-View-and-Managing-Global-Rates-for-Assets.html>.
- Click 'Save' after completing the form. The new contract will take effect for interactions with the customer from the start date mentioned in the contract.

Step 5 - Manage Tickets

Tickets raised by users can be viewed and managed in the 'Tickets' section of the 'Staff Panel'.

TICKET #	LAST UPDATE DATE	SUBJECT	FROM	PRIORITY	DEVICE NAME	ASSIGNED TO	ORGANIZATION
355	09/14/2018 12:03 pm	Provide access to dome ...	national services	Normal		frontfork	
354	09/14/2018 11:48 am	Service required for printer	region	Normal		frontfork	
286	09/14/2018 11:29 am	Generate the third party ...	Avantistude	Normal	DESKTOP-080SVJJ		
352	09/14/2018 9:47 am	Second Monitor [Suspicious ...	Avantistude	Normal	DESKTOP-080SVJJ		
351	09/14/2018 9:42 am	Second Monitor [Suspicious ...	Avantistude	Normal	DESKTOP-080SVJJ		
350	09/14/2018 9:39 am	Second Monitor [Suspicious ...	Avantistude	Normal	DESKTOP-080SVJJ		
349	09/14/2018 9:38 am	Second Monitor [Suspicious ...	Avantistude	Normal	DESKTOP-080SVJJ		
348	09/14/2018 9:37 am	Second Monitor [Suspicious ...	Avantistude	Normal	DESKTOP-080SVJJ		
347	09/14/2018 9:37 am	Second Monitor [Suspicious ...	Avantistude	Normal	DESKTOP-080SVJJ		
346	09/14/2018 9:34 am	Second Monitor [Suspicious ...	Avantistude	Normal	DESKTOP-080SVJJ		
345	09/14/2018 9:33 am	Second Monitor [Suspicious ...	Avantistude	Normal	DESKTOP-080SVJJ		

<changed image>

- The menu on the left allows you to filter tickets by ticket status. Filters include 'Open', 'Answered', 'Unassigned', 'My tickets', 'Overdue', 'Closed' and 'Paused'. You can customize the columns shown in each view. See '[Managing Tickets](#)' to find out more.
- Click a filter to view all tickets with a particular status. Click any ticket number to open the ticket details page.
- The ticket details page allows you to view ticket history, reply to the ticket, reassign it, add materials and more. For full details, see '[Managing Tickets](#)'.

Comodo One > Service Desk > Tickets > Open

System going sluggish #765 OPEN Reporter: Greg Wonderland

Schedule Process Add Material Claim Edit Close Delete More

Ticket Information

Priority:	Normal	User:	Greg Wonderland (5)
Department:	Maintenance	Email:	teleramabw@gmail.com
Create Date:	Tue, Feb 13 2018 4:50 pm	Organization:	Dithers Construction Company
Device Name:	-	Phone:	-
Assigned To:	Coyote	Source:	Web (182.74.23.22)
SLA Plan:	Default SLA (Active)	Last Message:	Tue, Feb 13 2018 4:50 pm
Due Date:		Last Response:	Wed, Feb 14 2018 2:39 pm
Asset Type:	Workstation	Ticket Type:	Problem
Ticket Type Sub Cate...	Slow	First Reply:	NaN.NaN.NaN 12:NaN am
Category:	Asset Issue / Report a Problem	Last Update:	10.04.2018 12:46 pm

- The structure of your tickets can be customized to your requirements in 'Admin Panel' > 'Settings' > 'Tickets'. See '[Ticket Settings and Options](#)' for more details.

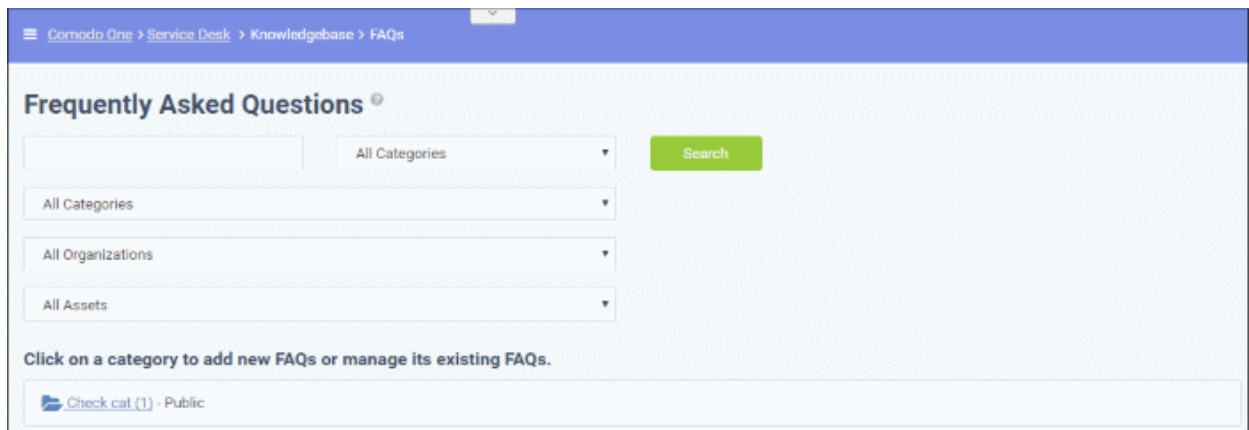
Step 6 - Manage Knowledgebase

The 'Knowledgebase' allows you to:

- Create a set of FAQs which will be shown in your customer portal to help users find answers to common problems.
- Create FAQ categories. You have to place FAQs in a category. For example, you can create a FAQ 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 more details.

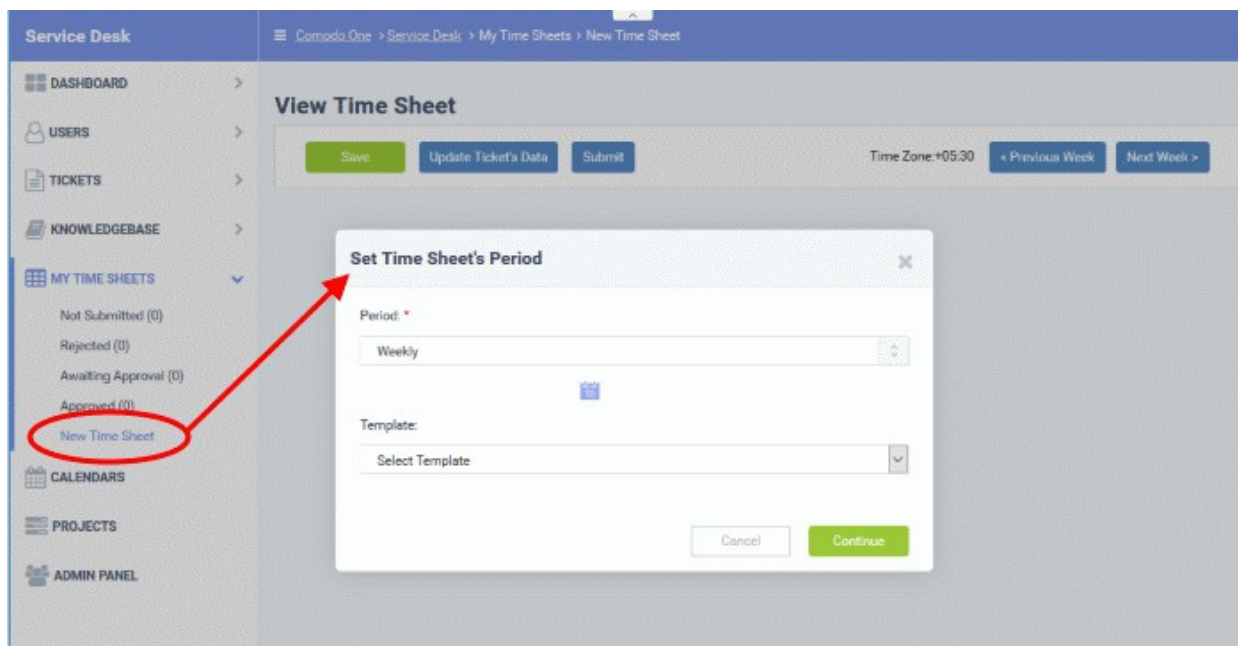
Step 7 - Manage Your Time Sheets

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.

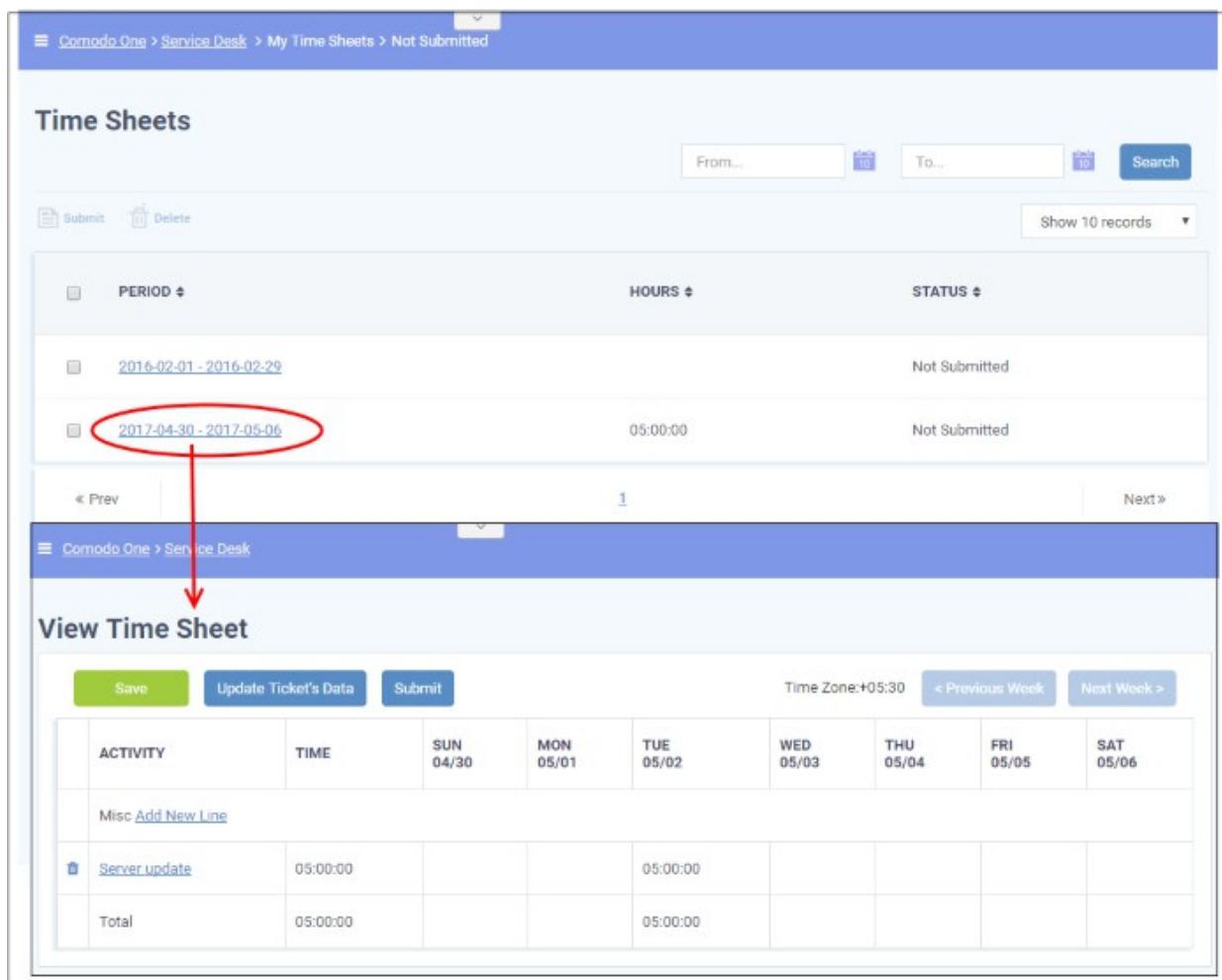
The screenshot shows the 'View Time Sheet' page with a table. The table has columns for 'ACTIVITY', 'TIME', and days of the week: 'SUN 04/30', 'MON 05/01', 'TUE 05/02', 'WED 05/03', 'THU 05/04', 'FRI 05/05', and 'SAT 05/06'. There are buttons for 'Save', 'Update Ticket's Data', and 'Submit' at the top. The table has a row for 'Misc Add New Line' and a 'Total' row at the bottom.

ACTIVITY	TIME	SUN 04/30	MON 05/01	TUE 05/02	WED 05/03	THU 05/04	FRI 05/05	SAT 05/06
Misc	Add New Line							
Total								

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'

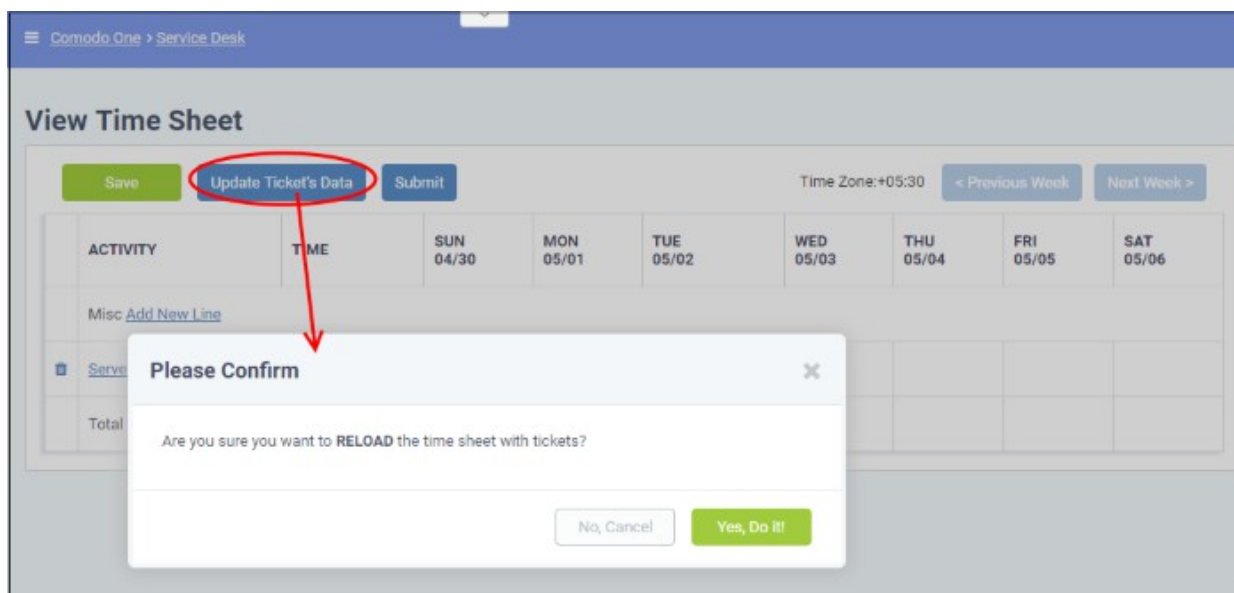
To update a time sheet

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



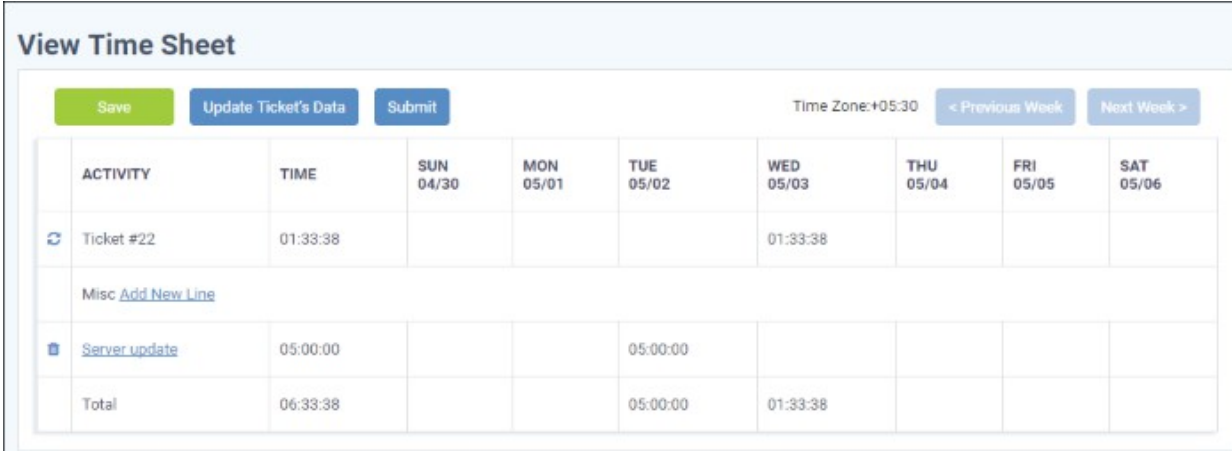
The screen for updating the time sheet will open, displaying each activity in a line, total time spent on it and time spent on them on each day in the time period covered by the time sheet. The screen displays the first week, within the period by default. To view the details on the previous or next weeks,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



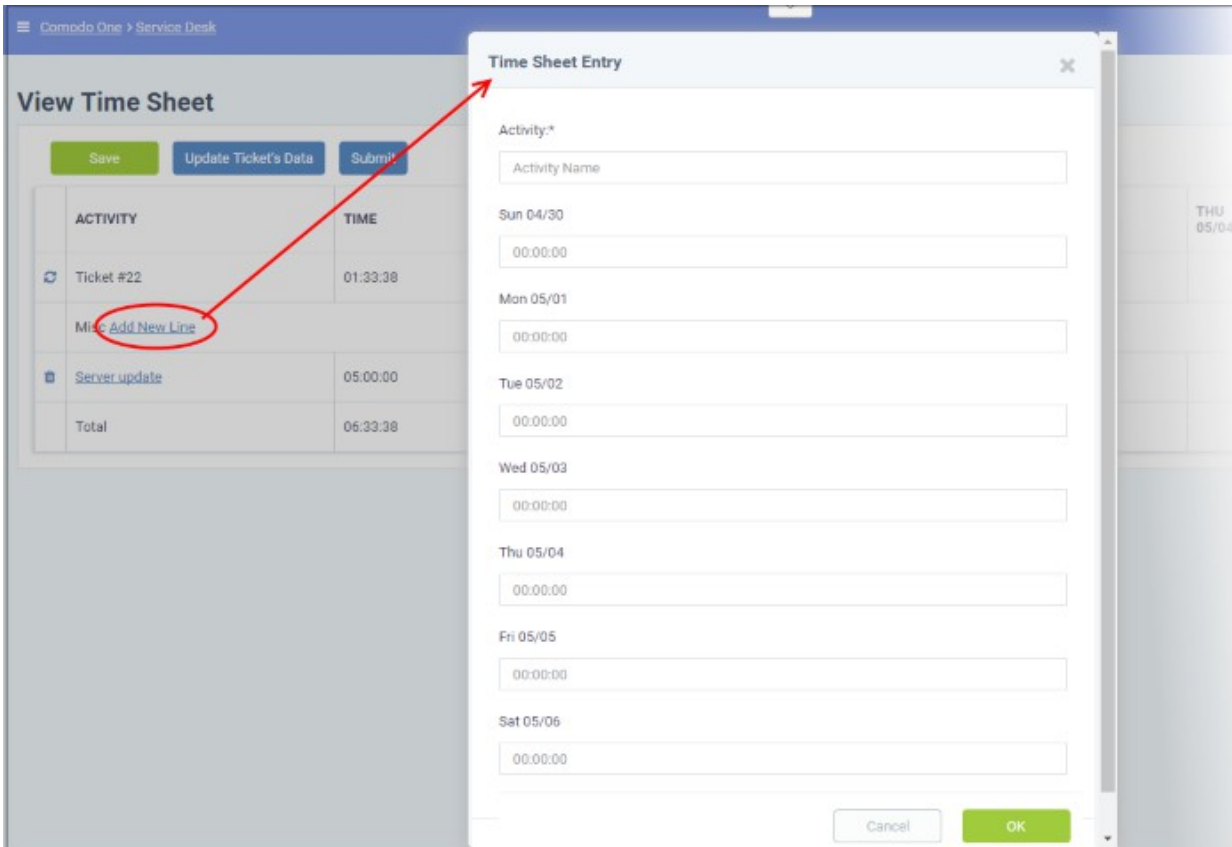
View Time Sheet

Buttons: Save, Update Ticket's Data, Submit

Time Zone: +05:30 | < Previous Week | Next Week >

ACTIVITY	TIME	SUN 04/30	MON 05/01	TUE 05/02	WED 05/03	THU 05/04	FRI 05/05	SAT 05/06
Ticket #22	01:33:38				01:33:38			
Misc Add New Line								
Server update	05:00:00			05:00:00				
Total	06:33:38			05:00:00	01:33:38			

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



View Time Sheet

Buttons: Save, Update Ticket's Data, Submit

[Add New Line](#)

Time Sheet Entry

Activity:*

Activity Name

Sun 04/30

00:00:00

Mon 05/01

00:00:00

Tue 05/02

00:00:00

Wed 05/03

00:00:00

Thu 05/04

00:00:00

Fri 05/05

00:00:00

Sat 05/06

00:00:00

Buttons: Cancel, OK

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.

Activity:*
Windows OS update

Sun 04/30
00:00:00

Mon 05/01
07:00:00

Tue 05/02
05:00:00

CHOOSE TIME

Time 05:00:00

Hour

Minute

Second

Done

Fri 05/05
00:00:00

- 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.

View Time Sheet

Save Update Ticket's Data Submit Time Zone: +05:30 < Previous Week Next Week >

ACTIVITY	TIME	SUN 04/30	MON 05/01	TUE 05/02	WED 05/03	THU 05/04	FRI 05/05	SAT 05/06
🗑 Ticket #22	01:33:38				01:33:38			
Misc Add New Line								
🗑 Server update	05:00:00			05:00:00				
🗑 Windows OS update	18:00:00		07:00:00	05:00:00	06:00:00			
Total	24:33:38		07:00:00	10:00:00	07:33:38			

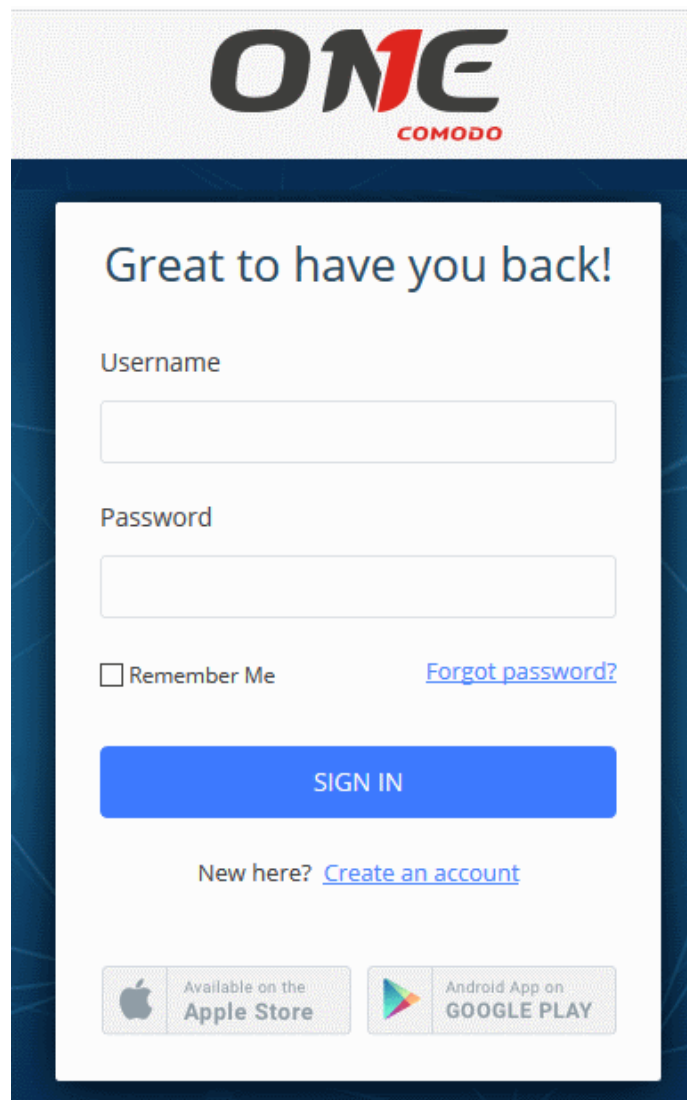
- Click 'Save' for your changes to take effect

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

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



ONE
COMODO

Great to have you back!

Username

Password

Remember Me [Forgot password?](#)

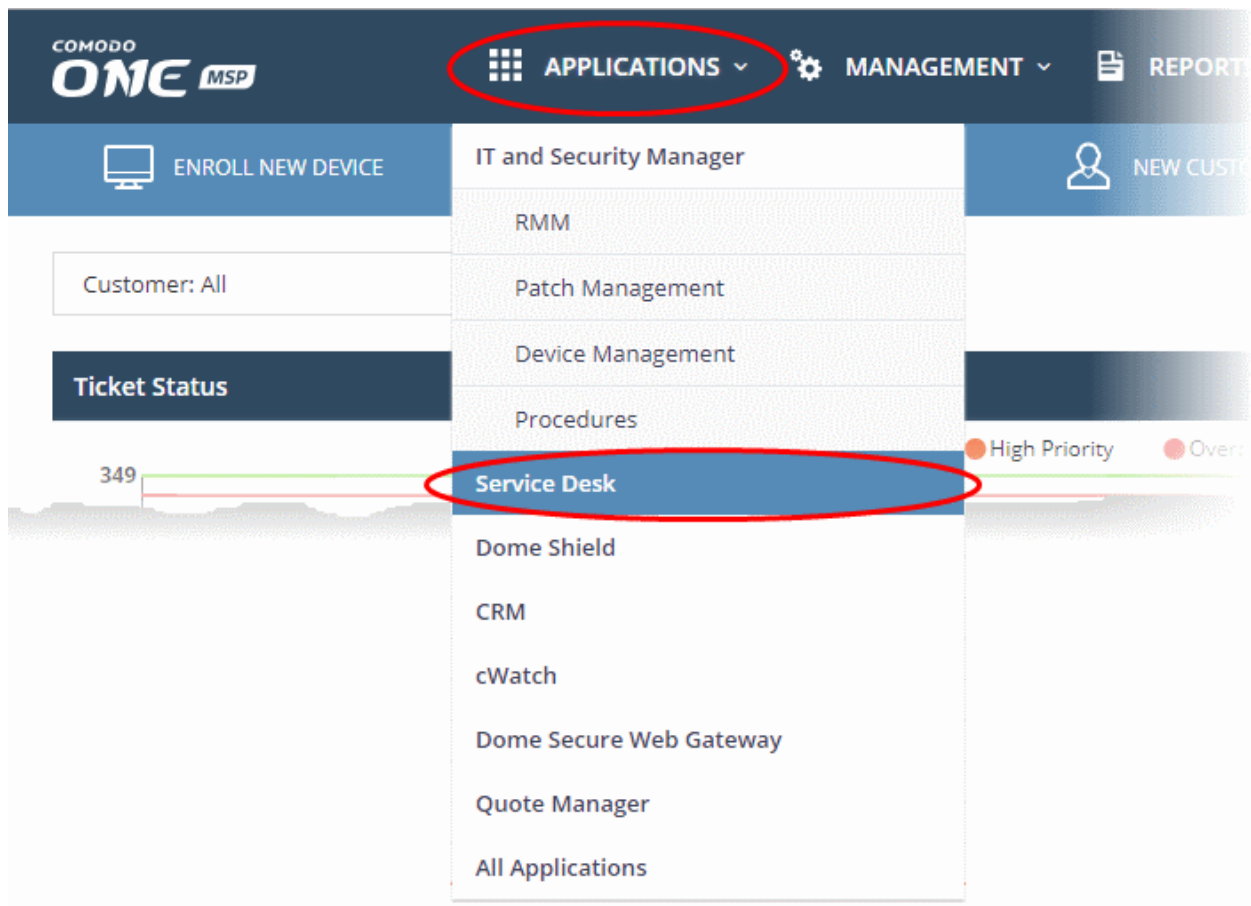
SIGN IN

New here? [Create an account](#)

Available on the **Apple Store**

Android App on **GOOGLE PLAY**

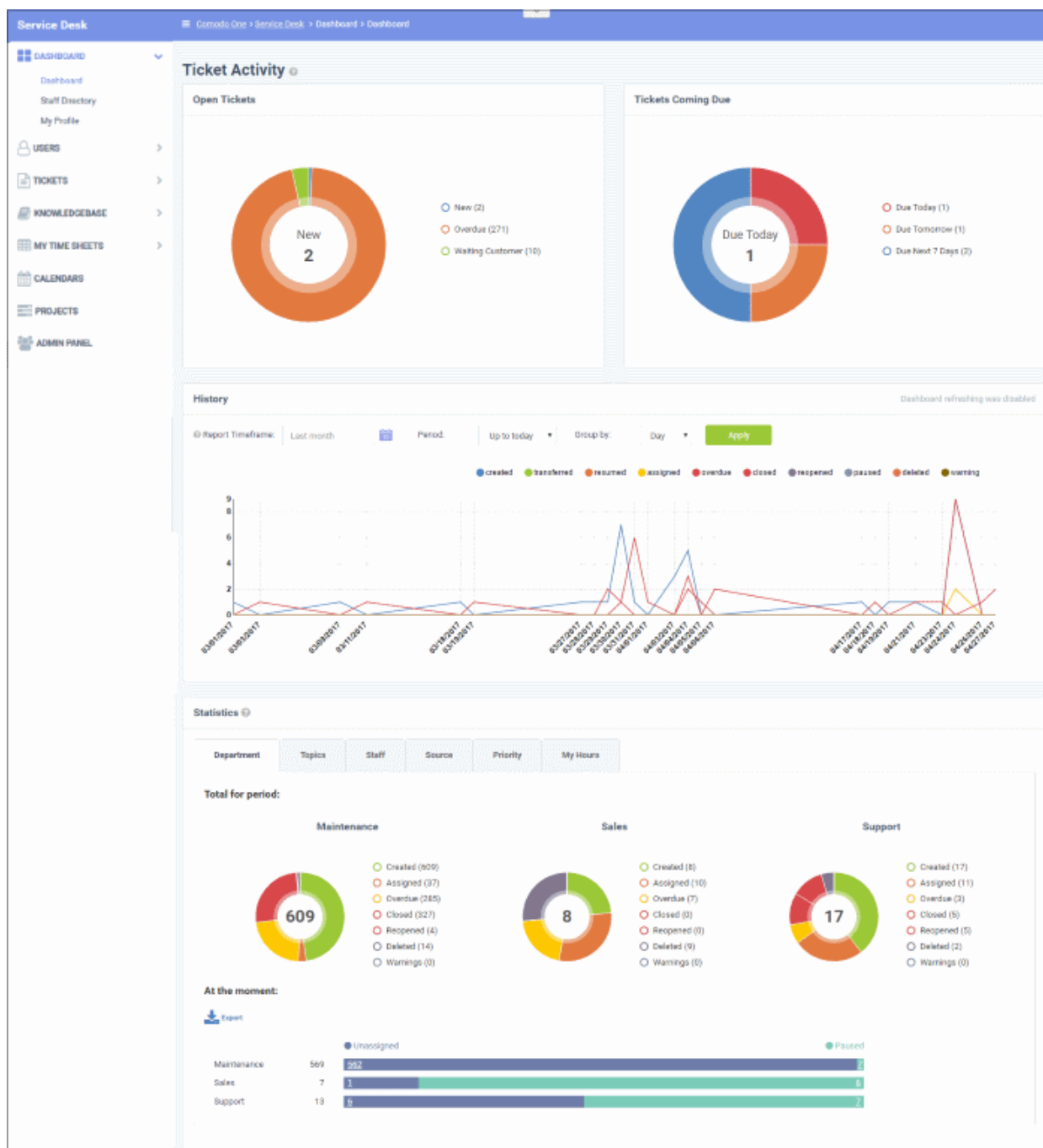
- After logging in to C1, you can open the service desk module by clicking 'Applications' > 'Service Desk':



Admins with appropriate privileges can setup two factor-authentication for additional login security. This can be enabled in Comodo One by clicking 'Management' > 'Account' > 'Account Security Details'. See **Setting up Two-Factor Login Authentication** in the C1 admin guide for help with this.

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** - Enables staff to add/import users and edit organizations. The section also allows staff to assign users to organizations so as to keep track of billing details. See **Managing Users and Organizations** for more details.
- **Tickets** - Allows staff to manage tickets created by users as well tickets created by staff members on behalf of users. Open, unassigned tickets can be claimed by staff members (depends on Service Desk settings). See **Managing Tickets** for more details.
- **Knowledgebase** - Allows staff to create FAQs that can be hosted in the end-user web portal. Staff can also

create canned responses that can be used when responding to a ticket. See [Managing Knowledgebase](#) for more details.

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

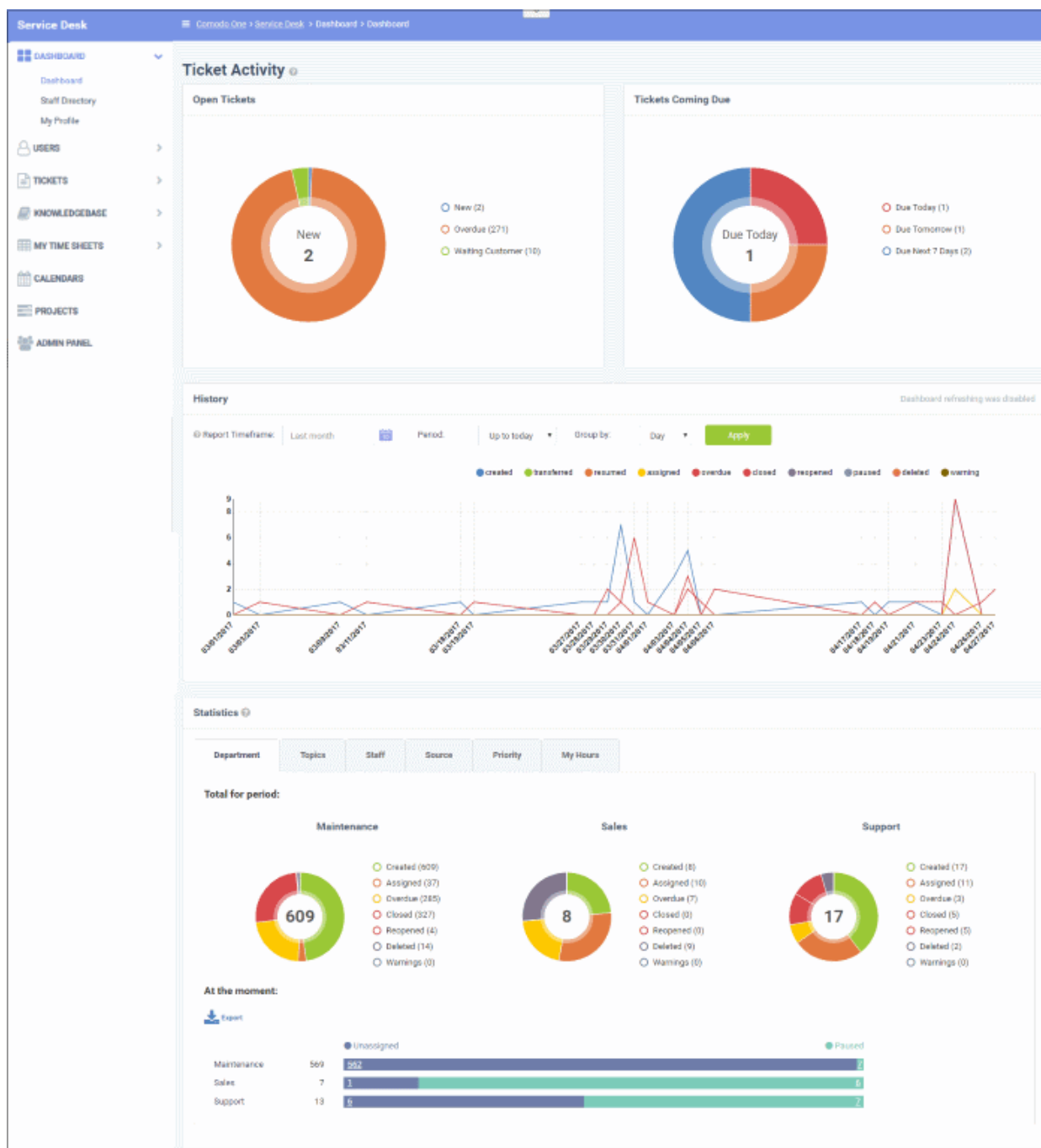
Various interfaces display a informational tool-tip  beside key features. Click the tool-tip to view quick help on the feature.

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:

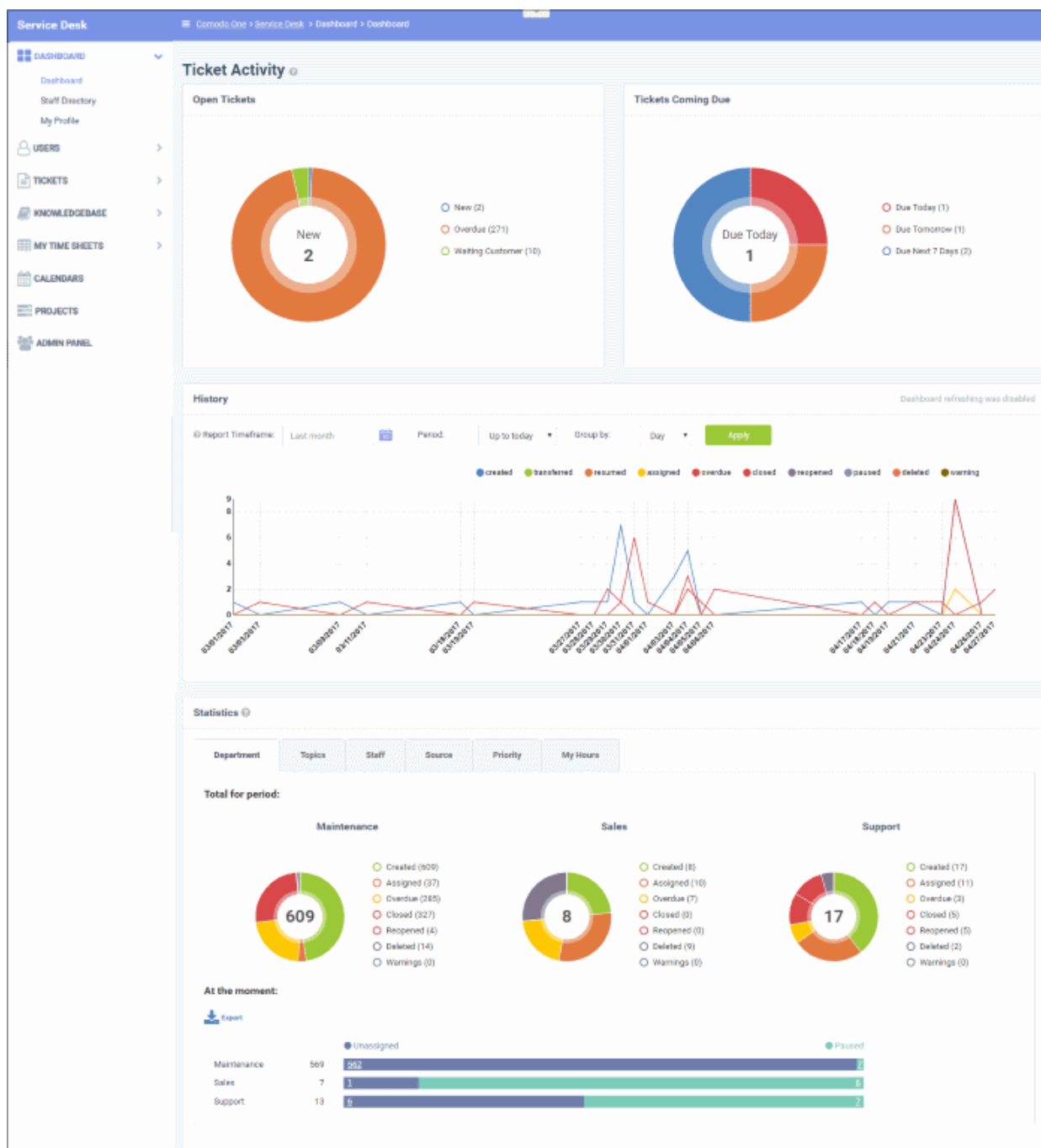


- **Viewing the Dashboard and Exporting Reports**
- **Viewing Staff Members**
- **My Profile**

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

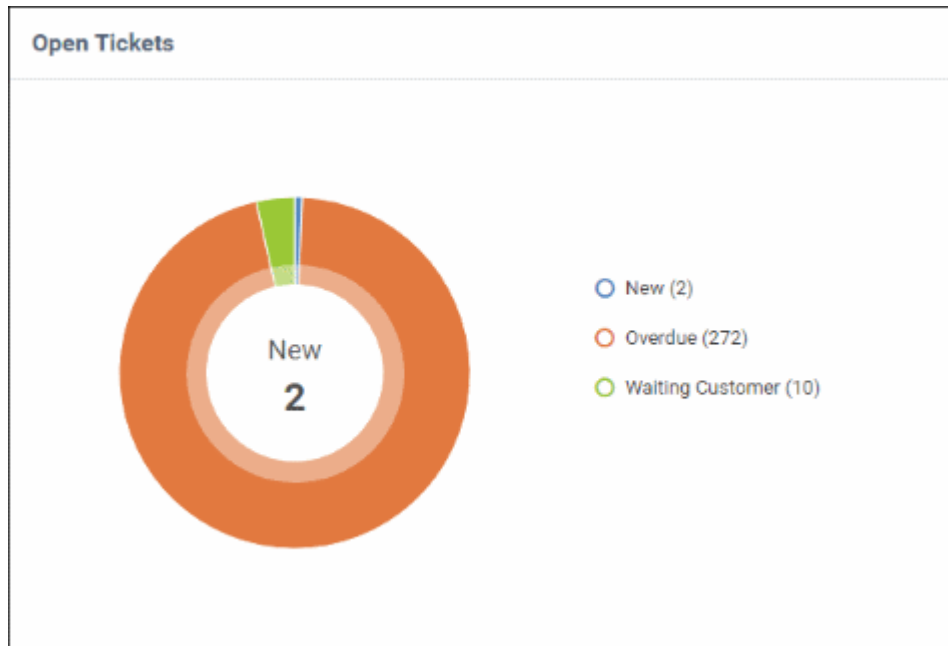


Ticket activity contains the following sections:

- 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

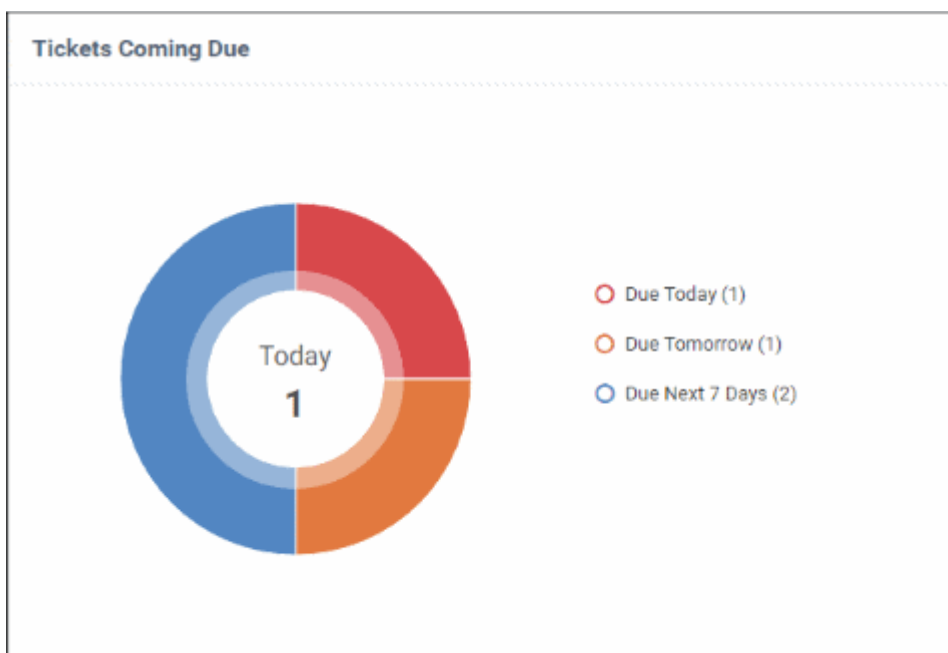
The total number of unresolved tickets. The pie chart breaks this down into tickets that are yet to be attended (new), overdue and awaiting customer response.



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

Tickets Coming Due

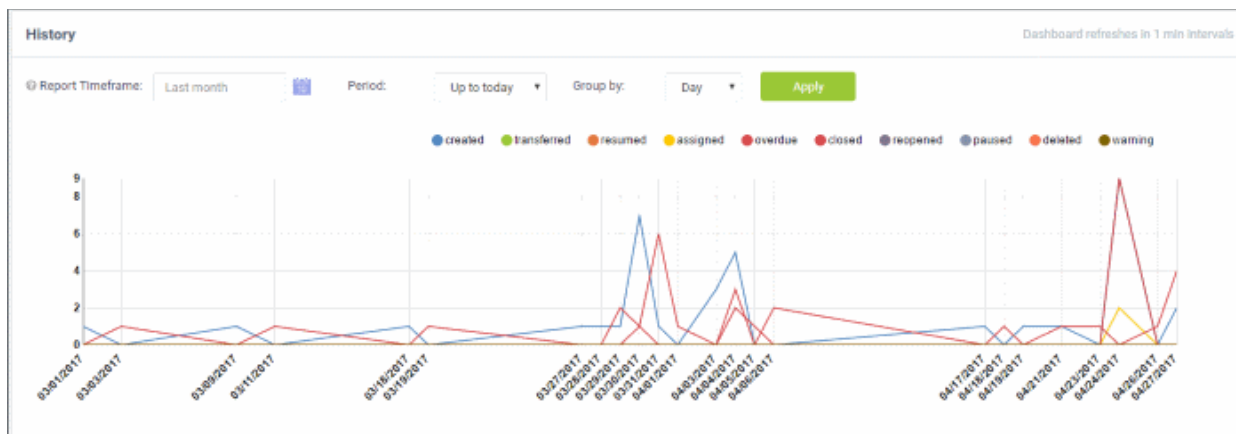
A heads up on tickets that are due in the near future:



- 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.



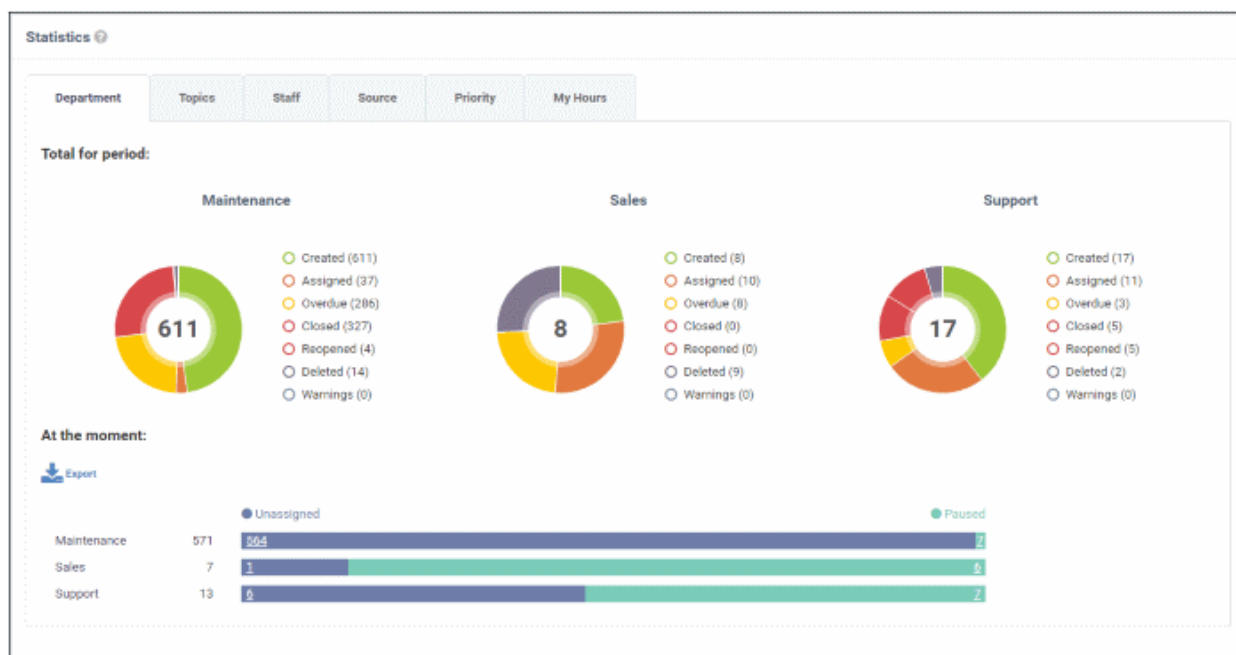
By default, the graph shows details for the previous 30 days. Use the 'Report timeframe' options to change the time-period. Click 'Refresh' to implement your changes.

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

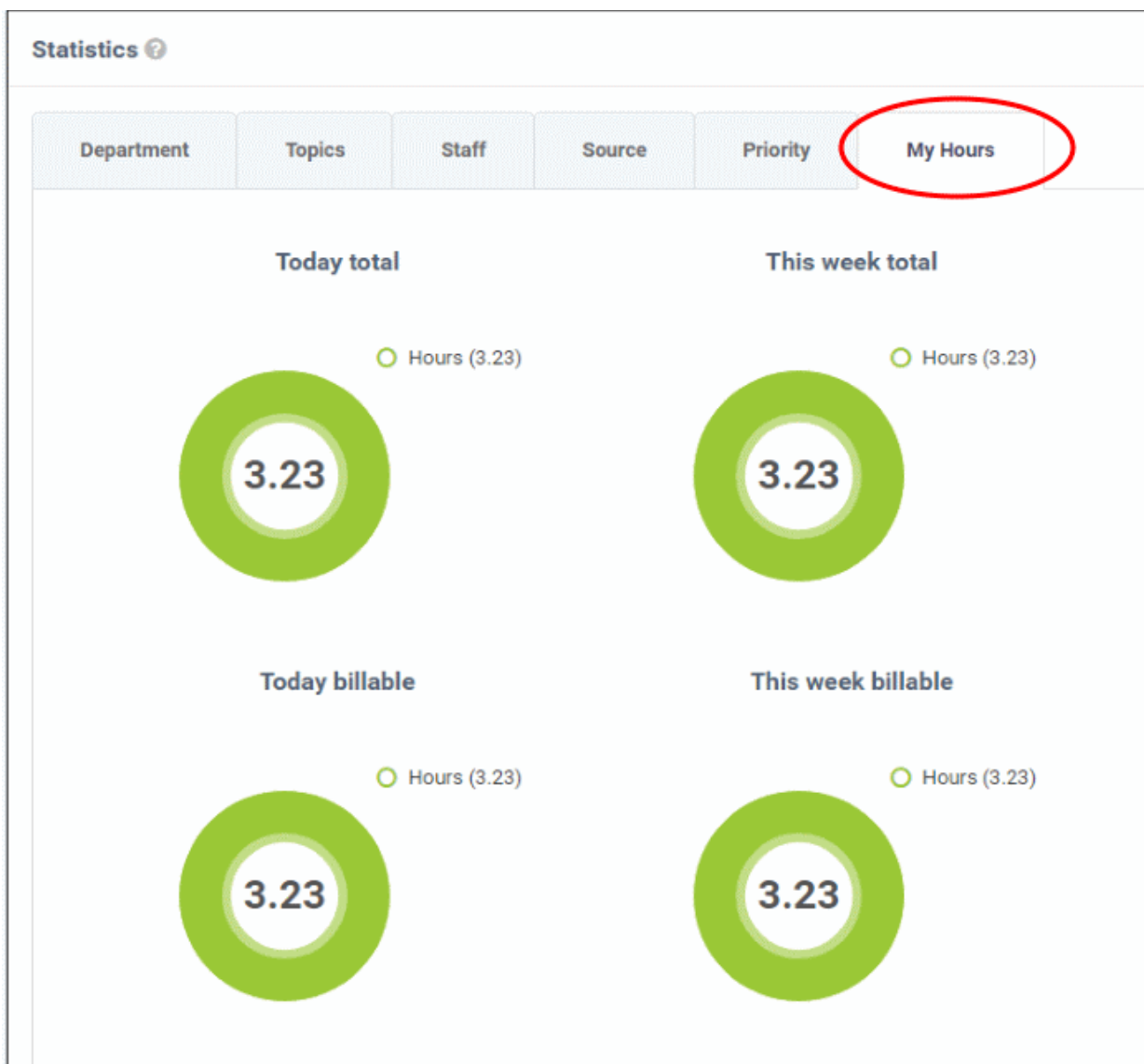
Statistics

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.



Exporting 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.

Staff Members ⓘ

Show 10 records ▾ -- All Departments -- ▾ Search... 🔍

NAME #	STATUS #	ROLE ID	EMAIL ADDRESS #	DEPARTMENT #	CREATED #	LAST LOGIN #
Coyote	Active	Account Admin	coyote@wile@yahoo.com	Support	03/04/2016 12:04 pm	04/27/2017 5:34 am
Gerald	Active	Admin	gerald@yopmail.com	Support	02/15/2017 11:12 am	03/09/2017 10:07 am
Max	Active	Technician	maelenin2016@outlook.com	Support	07/26/2016 11:04 am	07/26/2016 11:18 am
Dagwood	Active	Technician	avantstude@gmail.com	Support	08/01/2016 5:29 am	01/04/2017 9:22 am
Steam Ship	Active	Technician Org 1	sagalla@yahoo.com	Support	07/26/2016 11:04 am	01/10/2017 5:08 am
Gir	Active	Technician Org 1	anb@yahoo.co.in	Support	01/10/2017 6:42 am	

« Prev 1 Next »

Sorting 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

Comodo One > Service Desk > Dashboard > My Profile

My Account Profile

Contact Information

Username: ⓘ
coyoteewile@yahoo.com

Person Name:
Coyote

Email Address:
coyoteewile@yahoo.com

Phone Number:
Ext

Mobile Number:

Preferences Profile preferences and settings.

Preferred Language:
- Use Browser Preference -

Maximum Page Size (per page):
Show 10 records

Auto Refresh Rate: ⓘ
Every 1 min

Default Signature: ⓘ
- None -

Default Paper Size: ⓘ
Letter

Show assign tickets ⓘ

Signature Optional signature used on outgoing emails. ⓘ

Signature is made available as a choice, on ticket reply

Save Changes Reset Changes Cancel Changes

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 Organizations

- Tickets can be submitted to service desk by end-users using your customer help portal. Admins have the option to require registration, or to allow unregistered users (guests) to submit tickets.
- Users and guests can be assigned to an organization in order to keep track of billable hours on a ticket.
- The 'Users' link on the left allows staff members to add/import users, add/edit organizations and configure various settings.
- Click 'Staff Panel' > 'Users' to access the users area:

<input type="checkbox"/>	NAME ↕	EMAIL ↕
<input type="checkbox"/>	national services 📄 (1)	comodoc1@yopmail.com
<input type="checkbox"/>	region 📄 (1)	cmail1@yahoo.com
<input type="checkbox"/>	Herculespopular22 📄 (23)	herculespopular22@gmail.co
<input type="checkbox"/>	Avantistude 📄 (415)	avantistude@gmail.com

Refer to the following sections for more details:

- **Managing Users**
- **Managing Organizations**

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 or by email.
- The 'User Directory' interface lets you add and manage users.
 - Users can be manually added to service desk or imported from CSV file. Users can also be assigned to organizations.
 - Admins/staff can create a support ticket for a new user. The new user will be automatically enrolled as a guest user.
 - Non-registered users that create tickets will also be added as guest users.
 - Guest users must be registered in order to login into your support portal to create tickets. The login abilities for the users can be configured in Admin Panel > Settings > Access Control Settings interface. See **Access Control Settings** in Service Desk admin guide for more details.
 - Users can be registered in two ways:
 - By sending an enrollment email with an account activation link
 - By setting a temporary password for the user to login to the support portal
 - Endpoint users enrolled to ITSM can submit tickets by right-clicking the ITSM icon in the system tray. The endpoint user will be automatically added as a Guest User in Service Desk. You should manually register their user account to enable them to login to your web portal. See **Register a User** for more details.

To manage users

- Open the 'Staff Panel' if it isn't open already (last link in the left-hand menu)
- Click 'Users' > 'User Directory' to manage users.
- The 'User Directory' lists all registered users and guests, and allows staff to add, remove and update users.

	NAME	EMAIL	STATUS	CREATED	UPDATED	LAST TICKET UPDATE
<input type="checkbox"/>	national service (1)	comodoc1@yopmail.com	Guest	09/14/2018 12:03 pm	09/14/2018 12:03 pm	09/16/2018 11:49 am
<input type="checkbox"/>	regan (1)	email@yahoo.com	Guest	09/14/2018 11:48 am	09/14/2018 11:48 am	09/16/2018 11:49 am
<input type="checkbox"/>	herculespopulr22 (29)	herculespopulr22@gmail.com	Guest	07/27/2018 10:27 am	07/27/2018 10:27 am	07/29/2018 10:34 am
<input type="checkbox"/>	Aventistude (413)	aventistude@gmail.com	Guest	07/16/2018 10:20 am	07/16/2018 10:20 am	09/18/2018 3:27 pm

You can modify the table columns by clicking 'Customize Columns'. See **Modifying Table Columns** if you need help with this.

Staff members can perform the following tasks from 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 an organization**
- **Manage tickets raised by a user**
- **Create a new ticket on behalf of a user**
- **Export users list**
- By default, the 'User Directory' interface displays basic details about each user in six columns.
- You can add or remove columns by clicking the 'Customize Columns' button.
- The following is a list of all possible columns:

User Directory - Table of Column Descriptions	
Column Header	Description
Name	The name 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 Modifying Table Columns for more guidance on this.	
Organization	The organization 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 while adding or editing the user, for internal reference.

Sort items

By default, the user whose ticket was last updated is displayed at the top.

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

The 'Show records' drop-down on the right lets you select the number of entries displayed on the 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 name and email address. Staff members matching your parameters will be automatically fetched.
- Clear the search field to return to the all-user view (or simply click the 'User Directory' link on the left).

Add users

- Users can be added manually or imported from a list
- A non-registered user that raises a ticket in the support center will also be added as a guest user.
- You can create new support tickets on behalf of new users. The user will be automatically added as guest

user to Service Desk

- Guest users can be registered by activating their account. Only registered users are able to login to your support web portal to manage/create new tickets.
- Endpoint users enrolled to ITSM can submit tickets by right-clicking the ITSM agent on the system tray icon. The endpoint user will be automatically added as Guest User in Service Desk. You should manually register their user account in order to enable them to login to your support web-portal to track their tickets and create new tickets. 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 added to organizations in the 'Organizations' screen.

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

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

To manually add a user

- Open the 'Staff Panel' if it isn't open already (last link in the left-hand menu)
- Click 'Users'
- Click the 'Add New User' link at the top

The screenshot displays the 'User Directory' interface. At the top, there are four action buttons: '+ Add New User' (circled in red with a red arrow pointing to the modal), 'Import', 'Export to CSV', and 'Delete'. Below these buttons is a table header with columns for 'NAME', 'EMAIL', and 'STATUS'. A modal window titled 'Create New User' is open, containing the following fields:

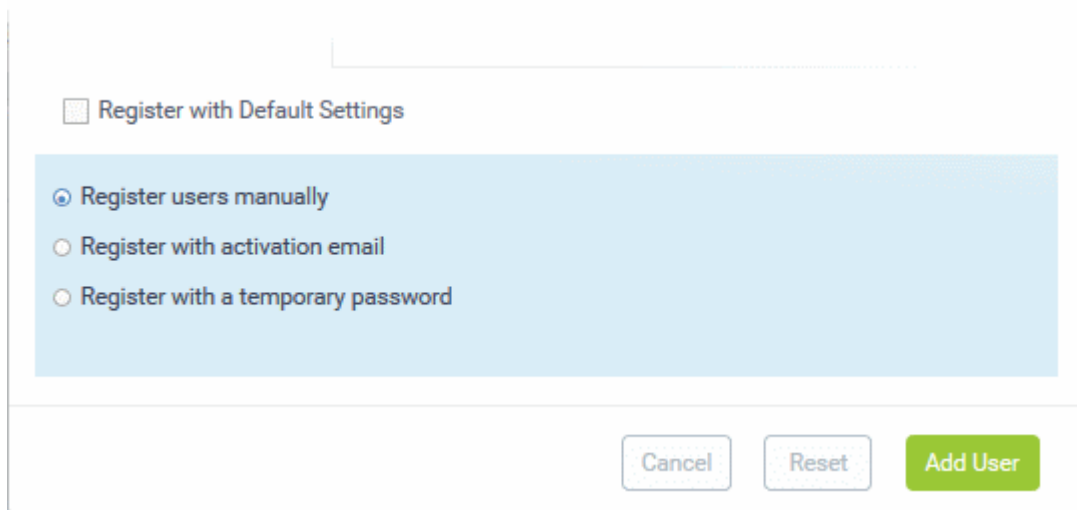
- Email Address: *
- Full Name: *
- Phone Number: (with an 'Ext:' field)
- Internal Notes:
- Register with Default Settings
- Default timezone: GMT -5.00 - Eastern Time (US & Canada), Bogota, Lima

At the bottom of the modal are three buttons: 'Cancel', 'Reset', and 'Add User'.

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' for more details.

- Email Address: Enter the email 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 name 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'
 - 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.



The screenshot shows a form titled 'Create New User'. At the top, there is a checkbox labeled 'Register with Default Settings'. Below this, there is a light blue shaded area containing three radio button options: 'Register users manually' (which is selected), 'Register with activation email', and 'Register with a temporary password'. At the bottom right of the form, there are three buttons: 'Cancel', 'Reset', and 'Add User'.

- **Register users manually** - Register by selecting a user in the 'User Directory' area and clicking the 'Register' button. See **Register a user** for more details.
- **Register with activation email** - An enrollment mail is sent to new users with an account activation link. The link takes the user to your support web portal to create a password. Once registered, the user will be able to login to your support portal to manage/view their tickets.
- **Register with a temporary password** - Enter a temporary password for the new user (as shown below)

Register with Default Settings

Register users manually

Register with activation email

Register with a temporary password

Temp. Password:

Confirm Password:

Password Change: Require password change on first login

- 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

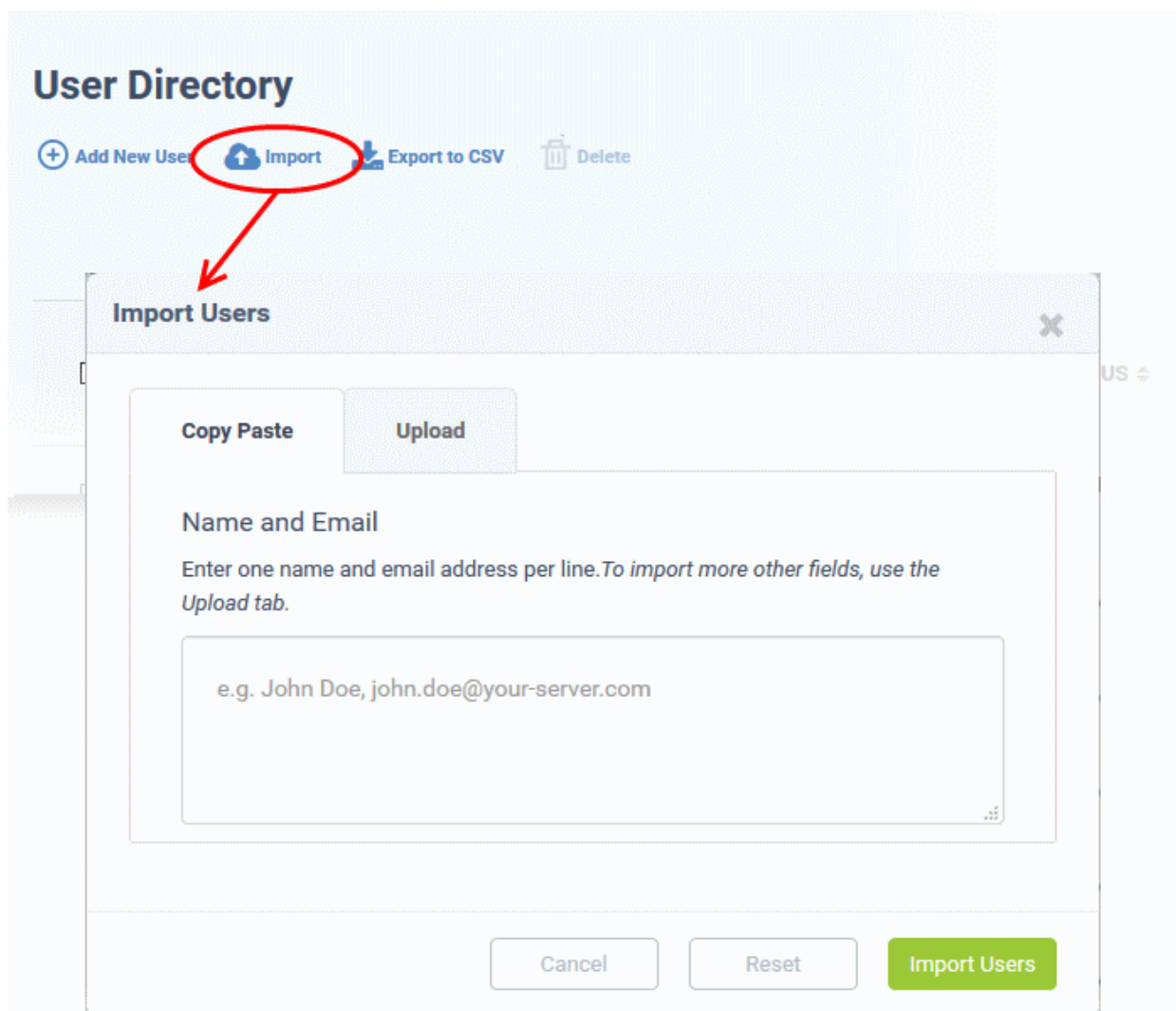
Once registered, you should communicate the URL of your web-portal and the password to the user. The user can login to the portal using their email as user name and the password you sent. If 'Require password change on first login' is enabled, the user will be asked to change the password on his/her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

- Click 'Add User'.

The user will be added as a guest user or registered user depending on the account registration. Once registered, you can manage their account and assign them to an organization.

To import users

- Open the 'Staff Panel' if it isn't open already (last link in the left-hand menu)
- Click 'Users'
- Click 'Import' at the top



The 'Import Users' screen will appear.

The 'Copy Paste' method allows you to import users with name and email details only.

- Enter full the name followed by a comma and the email address of the user.

Tip :Click 'Example CSV File' to download a sample file with all fields complete.

- To import more users, add more user details in subsequent lines.
- Click the 'Import Users' button to add the users as guest users.

The 'Upload' method allows you to import users from a CSV file.

Import Users
✕

Copy Paste
Upload

Import a CSV File

Use the columns shown in the table below. To add more fields, visit the Admin Panel -> Manage -> Forms -> Contact Information page to edit the available fields. Only fields with `variable` defined can be imported.

[📄 Example CSV File](#)

Email	Name	Phone	Notes	Organization ID (Optional)
john.doe@your-server.com	John Doe			

Browse...
No file selected.

Cancel
Reset
Import Users

- To add more user fields to the 'Upload' tab, go to 'Admin Panel' > 'Manage' > 'Forms' > 'Contact Information'. See **'Forms'** for more details.
- Click the 'Browse' button and navigate to the CSV file in your computer and click the 'Import Users' button.
- The users will be imported. Users will be added as guests, or their user account activation will be started as per your default settings.
 - The default registration settings are configured from the admin panel. ('Admin Panel' > 'Settings' > 'Users'). See **User Registration Settings** in the Service Desk admin guide for more details.

Register a user

A guest user can be registered by a staff member from the 'User Details' screen. Users can also register by themselves by signing up for an account at your support center page.

To register a guest user

- Open the 'Staff Panel' if it isn't open already (last link in the left-hand menu)
- Click 'Users'
- Click the name of the guest user who you want to register
- Click the 'Register' button

The screenshot shows a user management interface. At the top right, there are buttons for 'Delete User', 'Register', and 'More'. The 'Register' button is highlighted with a red circle. A red arrow points from this button to a modal window titled 'Register: Cyclist'. The modal window contains an information box that says 'Complete the form below to create a user account for Cyclist'. Below this, there are sections for 'User Account Login' and 'User Preferences'. The 'User Account Login' section includes a dropdown for 'Authentication Sources' (set to 'Use any available backend'), a text input for 'Username' (containing 'raleighallsteel@gmail.com'), and radio buttons for 'Status' (selected: 'Send account activation email to raleighallsteel@gmail.com', unselected: 'Register with a temporary password'). The 'User Preferences' section includes a dropdown for 'Time Zone' (set to 'GMT 5.30 - India, Sri Lanka'). At the bottom of the modal are buttons for 'Reset', 'Cancel', and 'Create Account'.

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 to enable 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)'.

SUPPORT CENTER

Support Ticket System

Elizabeth Ford | [Profile](#) | [Tickets \(0\)](#) - [Sign Out](#)

[Support Center Home](#) [Open New Ticket](#) [Tickets \(0\)](#)

Manage Your Profile Information

Use the forms below to update the information we have on file for your account

Contact Information

Email Address: *

Full Name: *

Phone Number: Ext:

Preferences

Time Zone: ▼

Access Credentials

Current Password:

New Password:

Confirm New Password:

User Account Activation using a temporary password

- Select 'Register with a temporary password'

Status:

Send account activation email to raleighhallsteel@gmail.com

Register with a temporary password

Temp. Password:

Confirm Password:

Require password change on first login

User Preferences

Time Zone:

- 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

- Open the 'Staff Panel' if it isn't open already (last link in the left-hand menu)
- Click 'Users'
- Click the name of the user:

The screenshot shows the 'User Page' for a user named 'Samantha'. The main page displays user details: Name: Samantha (circled in red), Email: sam.b16@yahoo.com, Status: Active (Registered), Created: 07/15/2016 3:41 pm, and Updated: 07/15/2016 3:41 pm. There are buttons for 'Delete User', 'Manage Account', and 'More'. An 'Update Samantha' dialog box is open, showing a message: 'Please note that updates will be reflected system-wide.' Below this is a 'Contact Information' section with fields for 'Email Address' (sam.b16@yahoo.com), 'Full Name' (Samantha), 'Phone Number' (1234567899), and 'Ext.' (100). There is also a text area for 'Internal Notes' and a 'Test' field. At the bottom of the dialog are 'Reset' and 'Update User' buttons.

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.

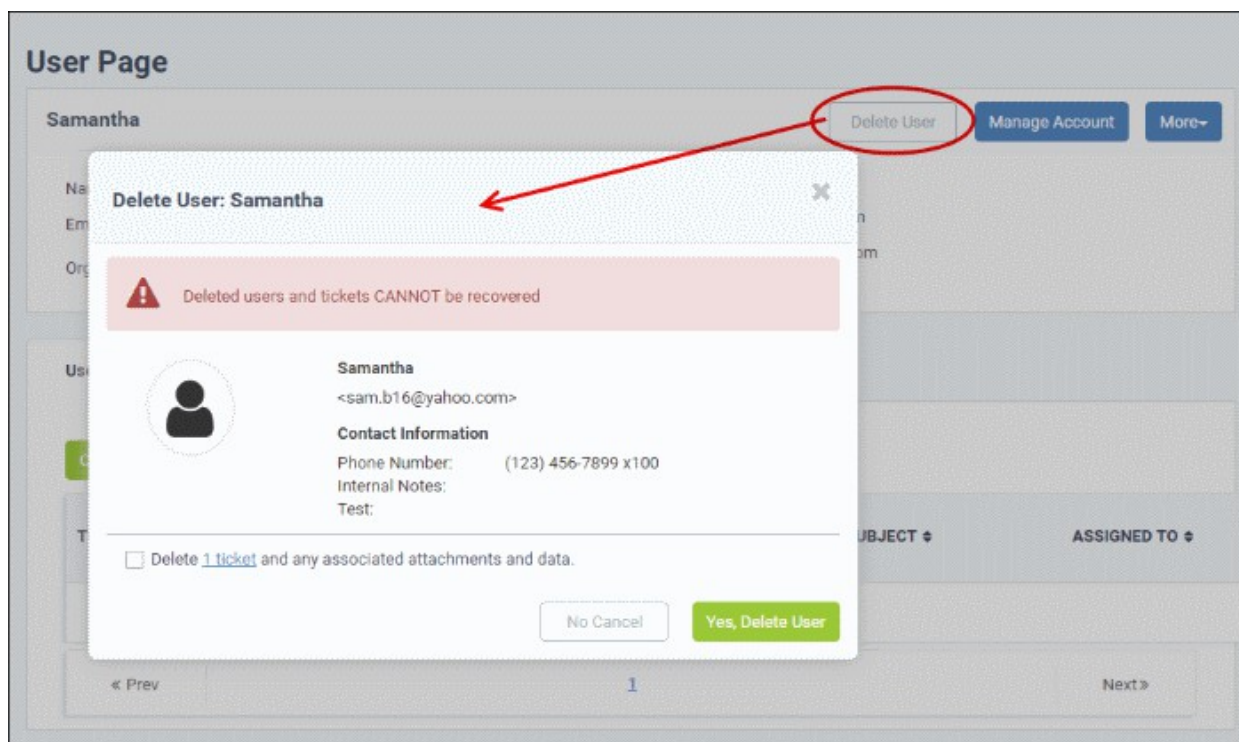
Delete a user

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**.

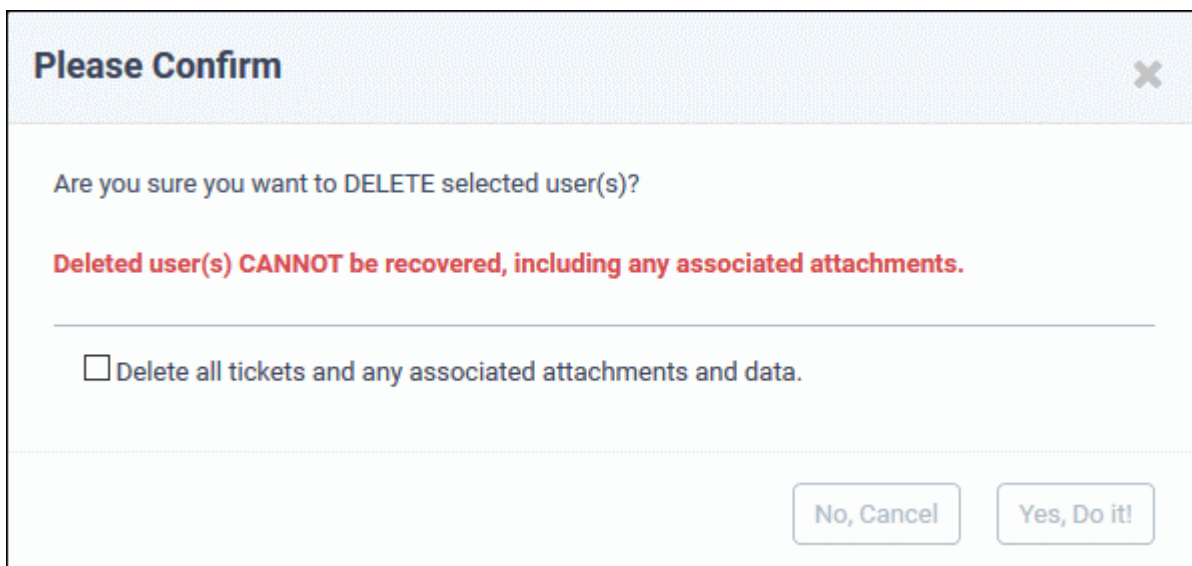
Note: You cannot remove a user who still has tickets associated with them.



- 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.



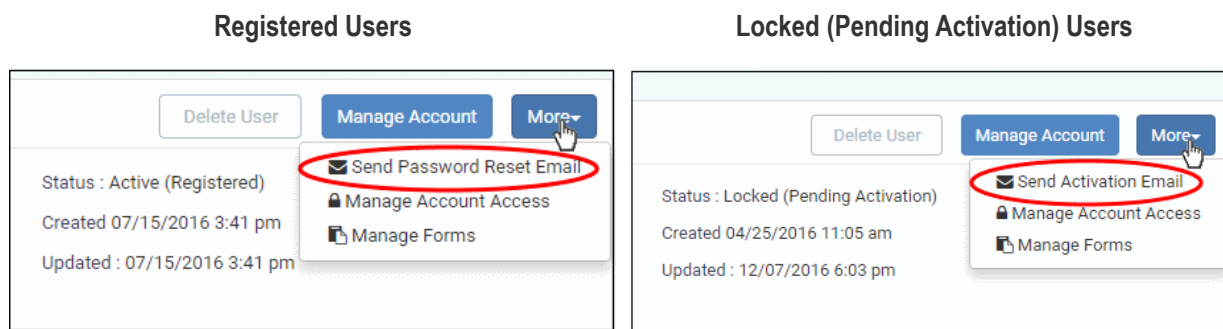
- Click 'Yes, Do it!' to confirm the deletion.
- 'Delete all tickets and any associated attachments and data' – Enable this if you also want to remove any tickets created by the user

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.

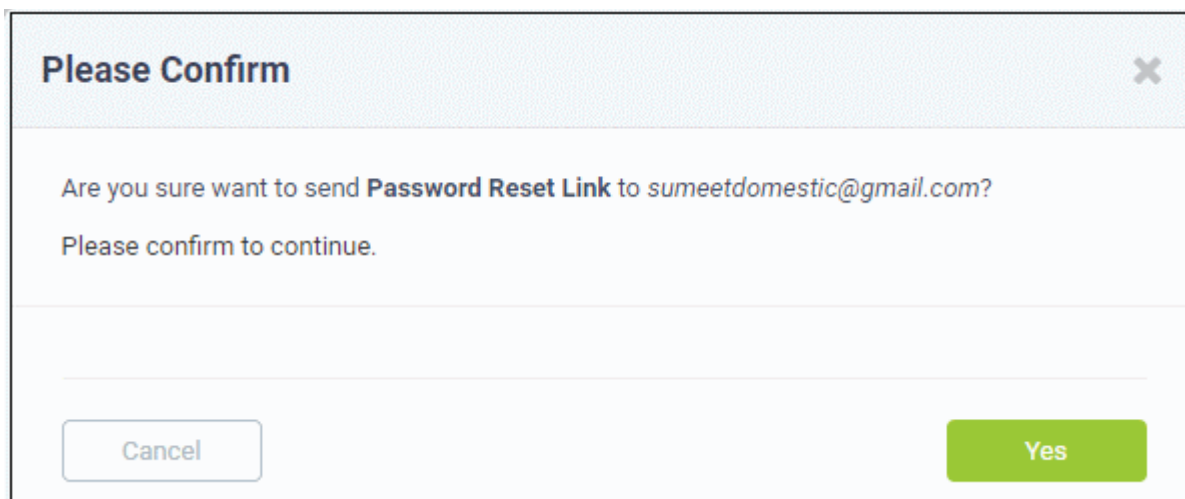
- Click 'Staff Panel' (if required) > 'Users' > 'User Directory'

- 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:



To reset a password

- Click the 'Send Password Reset Email' link

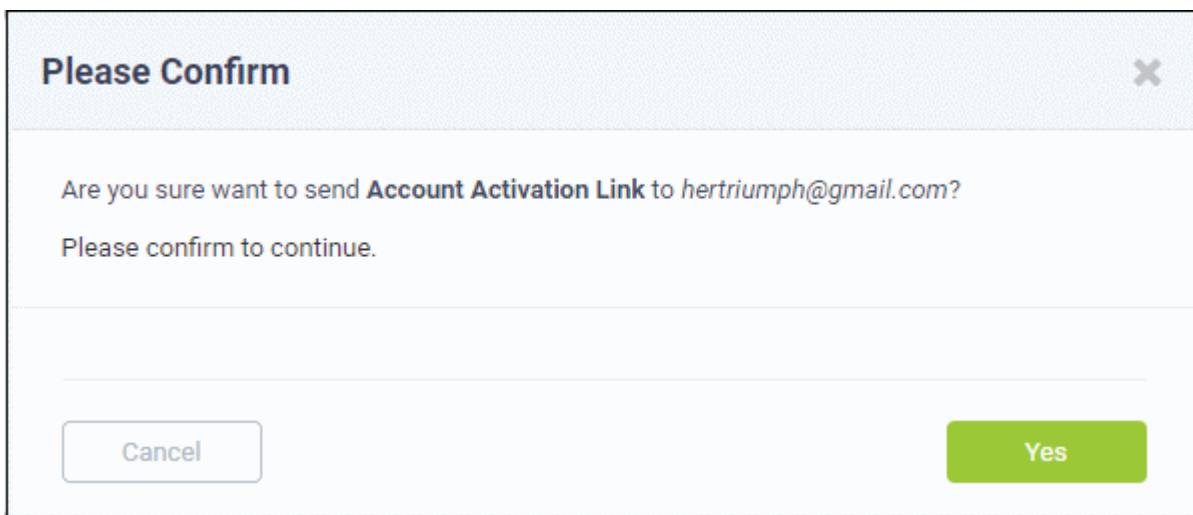


- Click 'OK' to confirm sending the password reset email to the user.

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



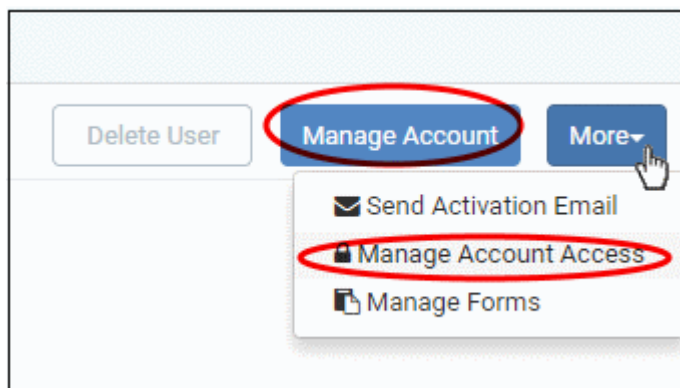
- Click 'Yes' to confirm and send the activation mail.

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 allows staff members to change a user's Organization and time zone:

The screenshot shows a user management window for 'Samantha'. It has two tabs: 'User Information' (selected) and 'Manage Access'. The 'User Information' section contains fields for Name (Samantha), Email (sam.b16@yahoo.com), and Organization (empty). The 'User Preferences' section contains a Time Zone dropdown menu set to 'GMT -5.00 - Eastern Time (US & Canada), Bogota, Lima'. At the bottom are 'Cancel', 'Reset', and 'Save Changes' buttons.

Field	Value
Name	Samantha
Email	sam.b16@yahoo.com
Organization	
Time Zone	GMT -5.00 - Eastern Time (US & Canada), Bogota, Lima

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

Samantha [Close]

User Information | **Manage Access**

Account Access:

Status: Active (Registered)

Username:

New Password:

Confirm Password:

Account Flags

Administratively Locked

Password Reset Required

User Cannot Change Password

Account Access

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

Account Flags

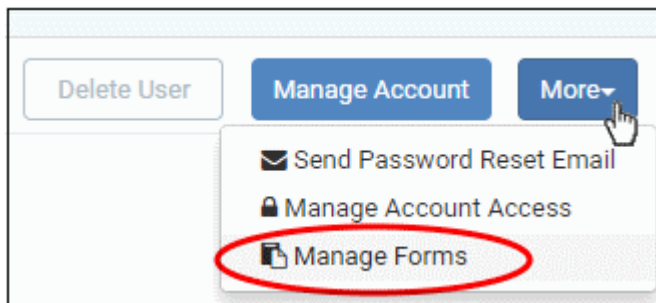
- **Administratively Locked:** If enabled, the user cannot access the web portal. However, the user can raise tickets via email.
- **Password Reset Required:** If enabled, a reset password screen will be displayed when the user logs into the web portal.
- **User Cannot Change Password:** If enabled,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

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

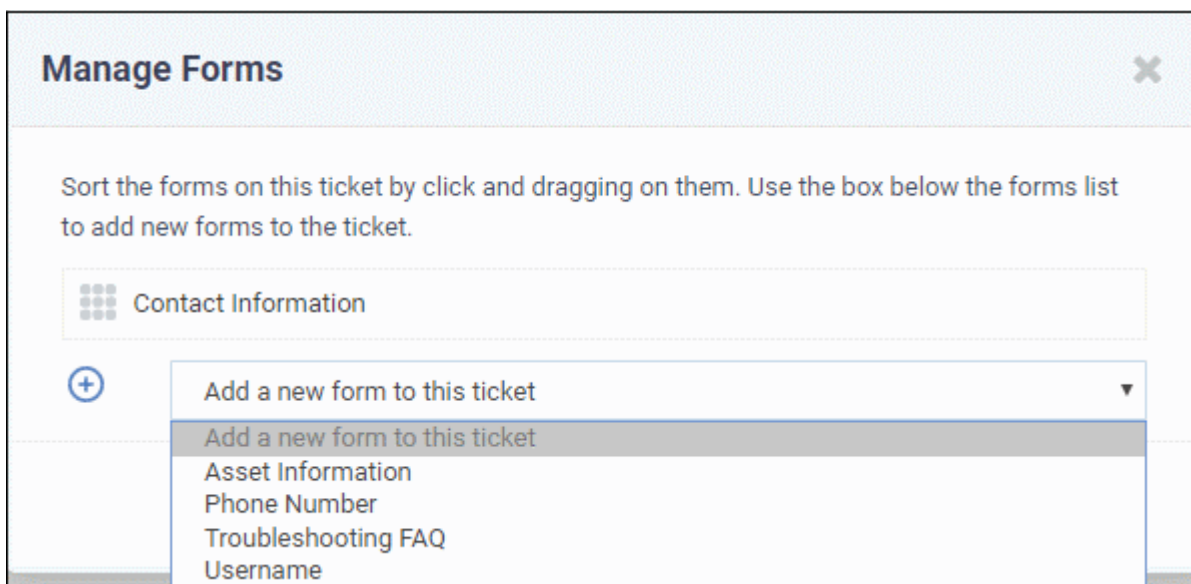
Add forms

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 can be configured in Admin Panel > Manage > Forms > Add Custom Form.
- 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.

Update Samantha ✕

i Please note that updates will be reflected system-wide.

Contact Information: Please provide all the details


Email Address: *

Full Name: *

Phone Number: Ext:

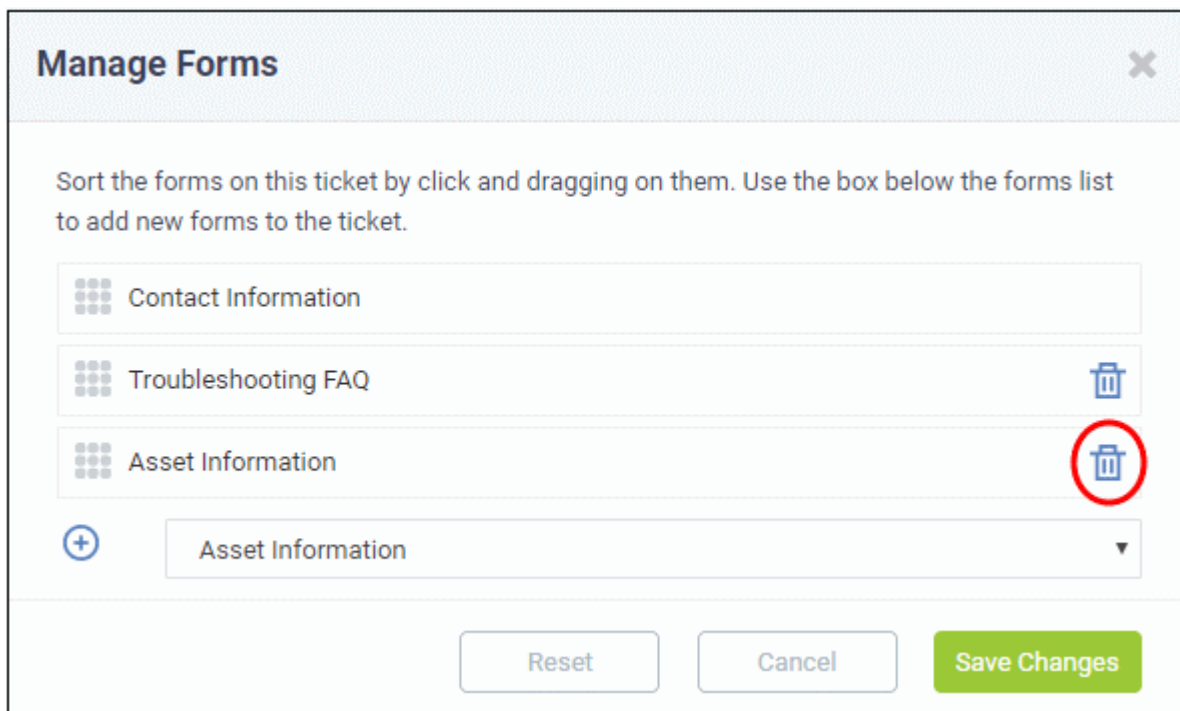
Internal Notes:

Test:



Troubleshooting FAQ:

- 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.



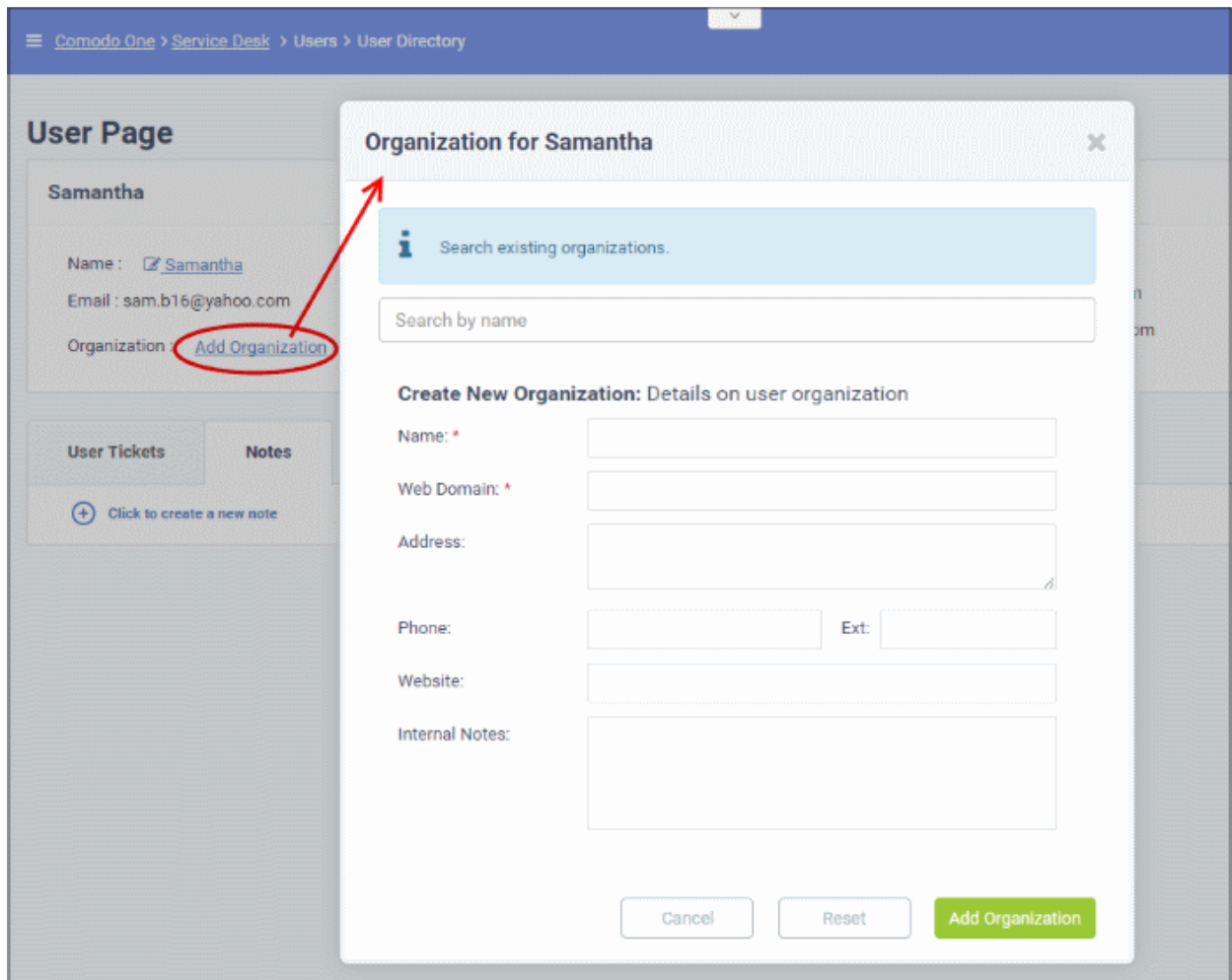
- Click the 'Save Changes' button at the bottom.

Add a user to an organization

Adding users to organizations makes it easy to keep track of billable items associated with the user. Cost reports in the admin panel show billing details for tickets assigned to an organization.

There are two methods of adding users to organizations. One method is to add users from the 'User Details' screen and then assign Organizations to them. The other method is to first create 'Organizations' and then add Users'. See **Managing Organizations** for more details. The following method describes how to assign users to organizations from the 'User Directory' screen.

- To add a user to an organization, click their name in the 'User Page' interface, then click 'Add Organization'.




You can assign the user to an existing organization or create a new organization and add the user to it.

- To add the user to an existing organization, type the first few letters of the organization name in the search field of the user interface and then click the organization link.

After choosing an Organization, the following confirmation dialog will appear:

Organization for Samantha ✕

i Search existing organizations.

 **Dithers Construction Company**

Organization Information

Web Domain:

Address:

Phone:

Website:

Internal Notes:

[Continue](#)

- Click 'Continue'.

The user will be added to the organization and will be displayed in the 'User Details' screen.

- To add a new organization, enter the details of the organization under 'Create New Organization: Details on User organization'.

Organization for Samantha ✕

i Search existing organizations.

Create New Organization: Details on user organization
Name: *
Web Domain: *
Address:
Phone: Ext:
Website:
Internal Notes:

See '[Managing Companies](#)' and '[Managing Organizations](#)' for more details about the details to be entered on adding a new organization.

- Click 'Add Organization'

The new organization will be added to Service Desk and the user will be added to the new organization.

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.



Comodo One > Service Desk > Users > User Directory

User Page

Impala Fletcher Delete User Register More

Name: [Impala Fletcher](#) Status: Guest
Email: agent.monitor@Coyote Created: 03/08/2016 4:59 pm
Organization: [Coyote](#) Updated: 04/28/2017 12:42 pm

User Tickets Notes

Create New Ticket

TICKET #	LAST UPDATE DATE	STATUS	SUBJECT	ASSIGNED TO
1	03/08/2016 6:24 pm	Closed	Device is not running[9035]	
2	03/29/2016 11:39 am	Open	Disk error detected[9037]	Coyote
3	12/04/2016 7:26 pm	Open	OS drive is running out of free disk space[9045]	Coyote

The screen will display 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 '**Managing 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.

Placing the mouse cursor over a ticket will display a call out providing the details of the ticket.

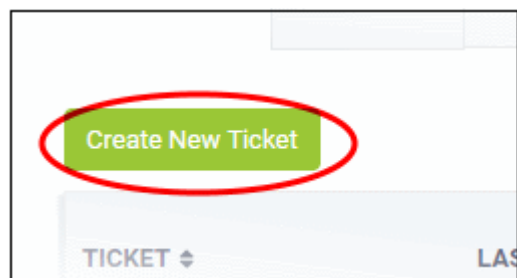
The ticket preview allows staff members to view the details and the links at the bottom to manage it. See '**Managing Tickets**' for more details.

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:

Open New Ticket

New Ticket

User Information:

Search User:

Create new user

Email Address: *

Full Name: *

Phone Number: Ext:

Internal Notes:

Ticket Notice: Send alert to user.

- 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.

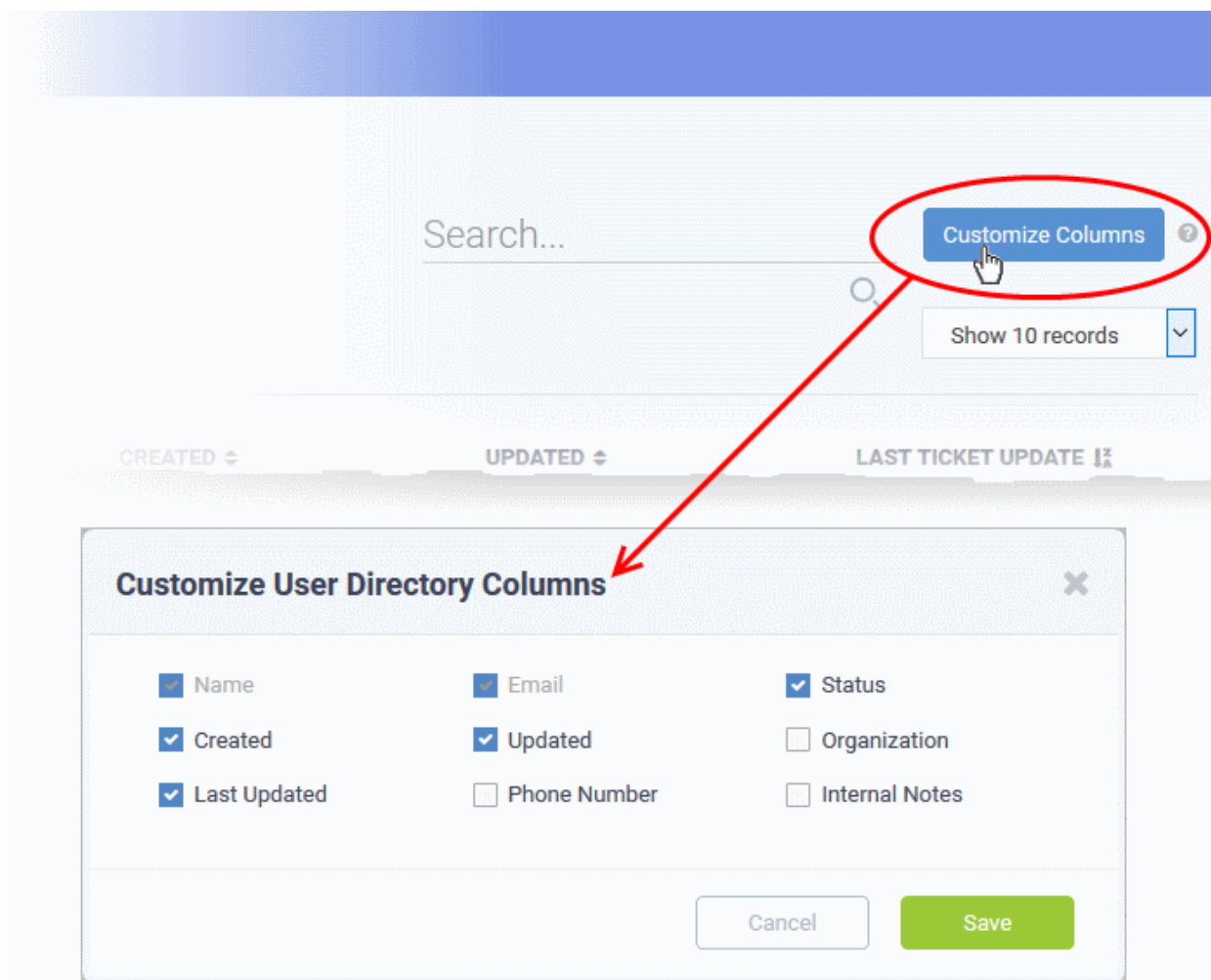


The file be downloaded and can be opened with applications such as Excel or Open Office Calc.

Modifying 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 will appear gray and cannot be disabled.

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

2.2.2 Manage Organizations

- Click 'Staff Panel' > 'Users' > 'Organizations'

An organization is a customer entity, usually a company or business from whom you will accept tickets. 'Users' are the people who actually submit the tickets.

The 'Organizations' interface allows staff members to:

- Add and manage organizations
- Assign end-users to organizations
- Manage organization tickets
- Configure account managers and primary contacts.
- View contracts agreed with the organization.

Notes

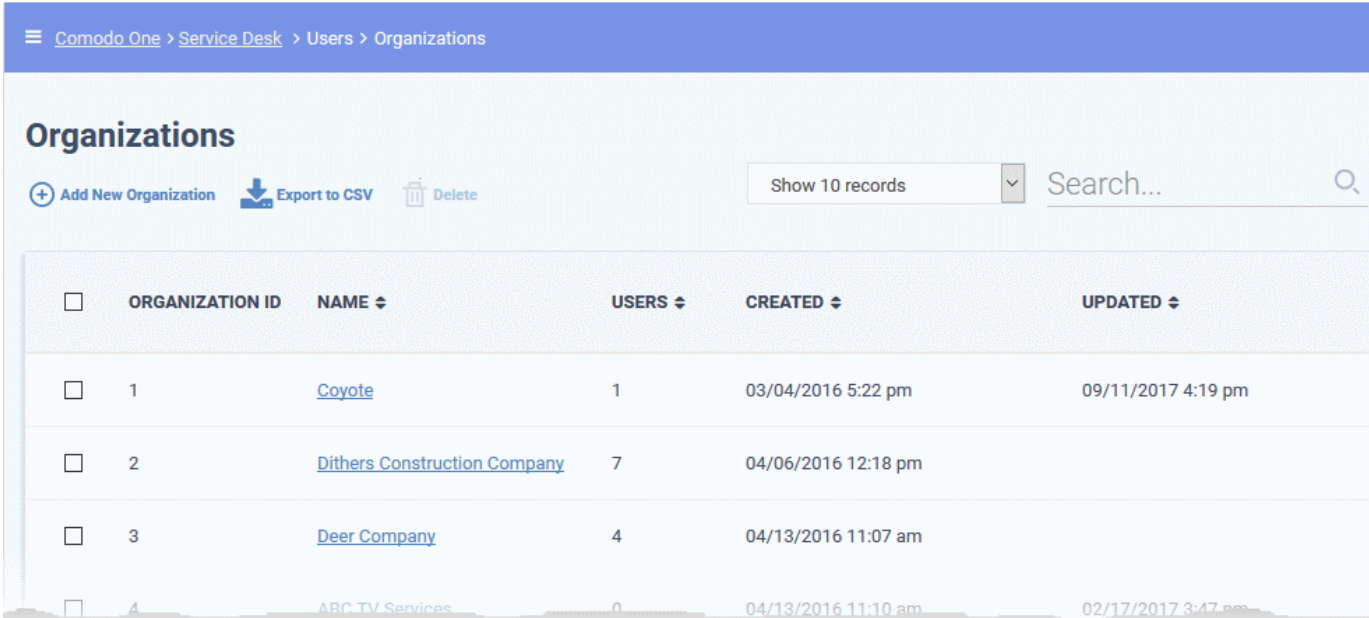
- We advise you create organizations/customers in the Comodo One interface rather than in Service Desk. Such 'Managed' organizations will be universally available in all integrated modules (patch management,

service desk, quote manager, ITSM etc).

- In the C1 interface, 'Organizations' are known as 'Customers'. You can add a new organization/customer in the C1 interface by clicking 'Management' > 'Customer'.
- Alternatively, you can create 'standalone' (aka 'Unmanaged') organizations in Service Desk. Organizations added via Service Desk will not be available in Comodo One or other modules. You can add such standalone organizations to C1 later on to convert them to fully managed.
- See '**Managing Companies**' for more about adding customers/organizations in C1
- See '**Add an Organization**' for adding standalone organizations in Service Desk.

Tip: You can add a new standalone organization by first adding the user belonging to the organization and then assigning the user to that organization. See '**Add a user to an organization**' in the previous section **Managing Users** for more details.

The organizations interface displays both managed organizations (created in C1) and unmanaged organizations (created in the Service Desk interface):



Comodo One > Service Desk > Users > Organizations

Organizations

+ Add New Organization Export to CSV Delete Show 10 records Search...

<input type="checkbox"/>	ORGANIZATION ID	NAME	USERS	CREATED	UPDATED
<input type="checkbox"/>	1	Coyote	1	03/04/2016 5:22 pm	09/11/2017 4:19 pm
<input type="checkbox"/>	2	Dithers Construction Company	7	04/06/2016 12:18 pm	
<input type="checkbox"/>	3	Deer Company	4	04/13/2016 11:07 am	
<input type="checkbox"/>	4	ABC TV Services	0	04/13/2016 11:10 am	02/17/2017 3:47 pm

Staff members can perform the following tasks from the organizations interface:

- **Add an organization**
- **Manage Details of an Organization**
- **Manage users of an organization**
- **Manage forms**
- **Manage tickets**
- **Manage notes**
- **View service contracts of an organization**
- **Remove Unmanaged Organizations**
- **Export organizations list**
- The number of organizations displayed in the list can be configured in the **My Profile** interface.

Organizations interface - Table of Column Descriptions	
Column Header	Description
Organization ID	The identity number assigned to the organization by Service Desk.
Name	The name of the organization. Click the name of an organization to open its details interface. From this interface you can: <ul style="list-style-type: none"> • Manage details of the organization • Add and manage users of the organization • Manage forms for the organization • View and manage tickets • Manage notes • View service contracts of the organization
Users	Number of users added to the organization.
Created	The date on which the organization was added to Service Desk.
Updated	Date and time of the most recent update to the organization's details.

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 organizations by name, address, phone number and website. Simply start typing your search term to see matching organizations.
- To remove all filters, clear the search field or click the 'Organizations' link.

Add an organization

Organizations 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 organizations and can access the organizations tickets and contracts. Staff members can also add organizations from the 'User Directory' interface (refer to explanation under **'Add a user to an organization'** in the section **'Managing Users'** for more details on this).

The following tutorial describes how to add organizations from the 'Organizations' interface:

To add an organization

- Open 'Staff Panel' > 'Users' > 'Organizations'
- Click the 'Add New Organization' link at the top

The screenshot shows the 'Add New Organization' form in the Comodo One Service Desk. The form is titled 'Add New Organization' and contains the following fields:

- Name:** * (Required)
- Web Domain:** * (Required)
- Address:**
- Phone:** and **Ext:** (Extension)
- Website:**
- Internal Notes:**

At the bottom of the form, there are three buttons: 'Cancel', 'Reset', and 'Add Organization'.

The 'Add New Organization' screen will be displayed:

- **Name:** Enter the name of the new organization.
- **Web Domain:** Enter the registered domain name for the organization.
- **Address:** The address of the organization.
- **Phone:** The contact number of the organization.
- **Website:** The URL of the organization's website.
- **Internal Notes:** Enter any notes regarding the organization.

Note: The field labels shown are default field labels. Admins with appropriate privileges can change the default field labels in Forms. Go to Admin Panel, click Manage > Forms then click Organization Information built-in form to edit its labels. The number of fields shown in the Organization Information can also be added or removed in the Forms interface.

After completing the form, click the 'Add Organization' button to add the organization to Service Desk. Staff members can now configure its settings and users.

Comodo One > Service Desk > Users > Organizations

Velachery Infrastructure Management Services

Velachery Infrastructure Management Services More ▾

Name: [Velachery Infrastructure Management Services](#) Created: 04/28/2017 2:24 pm
Account Manager: Updated: 04/28/2017 2:24 pm

Users Tickets Notes Contracts

[+ Add User](#) [+ Import](#) [Remove](#)

NAME	STATUS	EMAIL	CREATED	UPDATED
Monitor Agent (0)	Passive	agent.monitor@velinfmas.com	04/28/2017 2:24 pm	04/28/2017 2:24 pm
Patch Management Agent (0)	Passive	agent.patchmanagement@velinfmas.com	04/28/2017 2:24 pm	04/28/2017 2:24 pm

« Prev 1 Next »

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, ITSM and Patch Management, are capable of automatically sending reports (in the form of tickets) to Service Desk via API.

Manage Organization Details

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

To view and manage details of an organization

- Click 'Users' on the left then 'Organizations'
- Click the name of the organization to open its details interface

The organization configuration interface will open.

The screenshot shows the 'Velachery Infrastructure Management Services' page in the Comodo One Service Desk. The page title is 'Velachery Infrastructure Management Services'. Below the title, there is a card with the organization name and an 'Account Manager' field. A red circle highlights the organization name, and a red arrow points to a modal window for editing its details. The modal window has two tabs: 'Fields' and 'Settings'. The 'Fields' tab is active, showing the following information:

Organization Information: Details on user organization

Name: * Velachery Infrastructure Management Services

Web Domain: * velinfmas.com

Address: 133, Captain Road, Velachery

Phone: 85296314 Ext:

Website: www.velinfmas.com

Internal Notes:

Type: Non-managed

Buttons: Cancel, Reset, Update Organization

It contains two tabs:

- **Fields** - View and edit general details of the organization.

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

The 'Fields' tab

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

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

Velachery Infrastructure Management Services [Close]

Fields [Settings]

Organization Information: Details on user organization

Name: * Velachery Infrastructure Management Services

Web Domain: *

Address:

Phone: Ext:

Website:

Internal Notes:

Type: Non-managed

The 'Fields' tab - Form Parameters	
Parameter	Description
Name	Displays the name of the organization. You cannot edit the name from here.
Web Domain	The organization's domain . You can change the domain name if required
Address	The physical location of the organization as entered during its creation. You can change the address details as required.
Phone	The contact number of the organization as entered during its creation. You can edit the phone number if required.
Website	The URL of the organization's website. You can change the website details if required.
Internal Notes	Enter any notes regarding the organization.
Type	Indicates whether the organization is 'managed' (added through C1) or 'non-managed' (stand-alone organization added through Service Desk)

- Edit the details as required.

The 'Settings' tab

Velachery Infrastructure Management Services

Fields | **Settings**

Available Outgoing Email Address:

Default Outgoing Email Address:

Account Manager:

Auto-Assignment: Assign tickets from this organization to the Account Manager

Primary Contacts:

Automated Collaboration:

Primary Contacts: Add to all tickets from this organization

Organization Members: Add to all tickets from this organization

Main Domain: (several domains may be specified as comma separated list)

Auto Add Members From:

The 'Settings' tab - Form Parameters	
Parameter	Description
Available Outgoing Email Address	<p>The 'Available Outgoing Email Address' field displays all available email addresses added for receiving ticket requests and sending outgoing mails in Service Desk.</p> <p>You can select the email addresses pertaining to the organization and to displayed for selection as default outgoing email address for the organization in the 'Default Outgoing Email Address' drop-down.</p> <p>Background Note: Email addresses for receiving ticket requests and sending outgoing mails are configured in the 'Admin Panel' > 'Emails' > 'Emails' interface. See https://help.comodo.com/topic-289-1-625-7875-email-addresses.html for more details.</p>
Default Outgoing Email Address	<p>Allows you select an email address to be used for emails and ticket responses sent on behalf of the organization and to receive the replies.</p> <p>The 'Default Outgoing Email Address' drop-down displays only those email addresses selected from the 'Available Outgoing Email Address' field.</p>
Account Manager	<p>The drop-down displays a list of all administrators and staff members added to service desk</p> <p>Choose the account manager responsible for the organization to manage their service desk account and tickets generated by the users .</p>
Auto Assignment	<p>Choose whether or not the tickets generated by the users of the organization are to be automatically assigned to the account manager.</p>
Primary Contacts	<p>Click 'Select Contacts' to view the list of all users added for the organization and select the contact persons for the organization from the list.</p>
Automated Collaborations	<p>Allows you to add collaborators for the tickets generated by the users of the organization. Collaborators added for a ticket will receive copies of all communication emails between the staff and the user during the progress of the a ticket and will be able to respond for the communications.</p> <ul style="list-style-type: none"> • Primary Contacts - All primary contacts selected in the 'Primary Contacts' will be added as collaborators for the tickets pertaining to the organization. • Organization Members - All users of the organization members will be added as collaborators for the tickets pertaining to the organization.
Main Domains Auto Add Members From:	<p>Allows you to specify the domains to import the users from, for the organization.</p>

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

Manage users of an organization

Staff members can manually add or import users to an organization. When a user is first added they will be listed as a guest user. To have an account in Service Desk, a guest user has to be registered. Staff have the ability to 'register' guest users.

- Non-registered users that raise a ticket in the web portal will be added to Service Desk as a guest users. See **'Add a user'** and **'Register a user'** in the **'Managing Users'** section for more details.
- The 'Users' tab in the Organization details interface allows staff members and administrators to add or remove users for an organization.

- Users added via the 'User Directory' interface can be added to organizations in the 'Organizations' screen. The following method describes how to add users directly to organizations from the 'Organizations' screen.

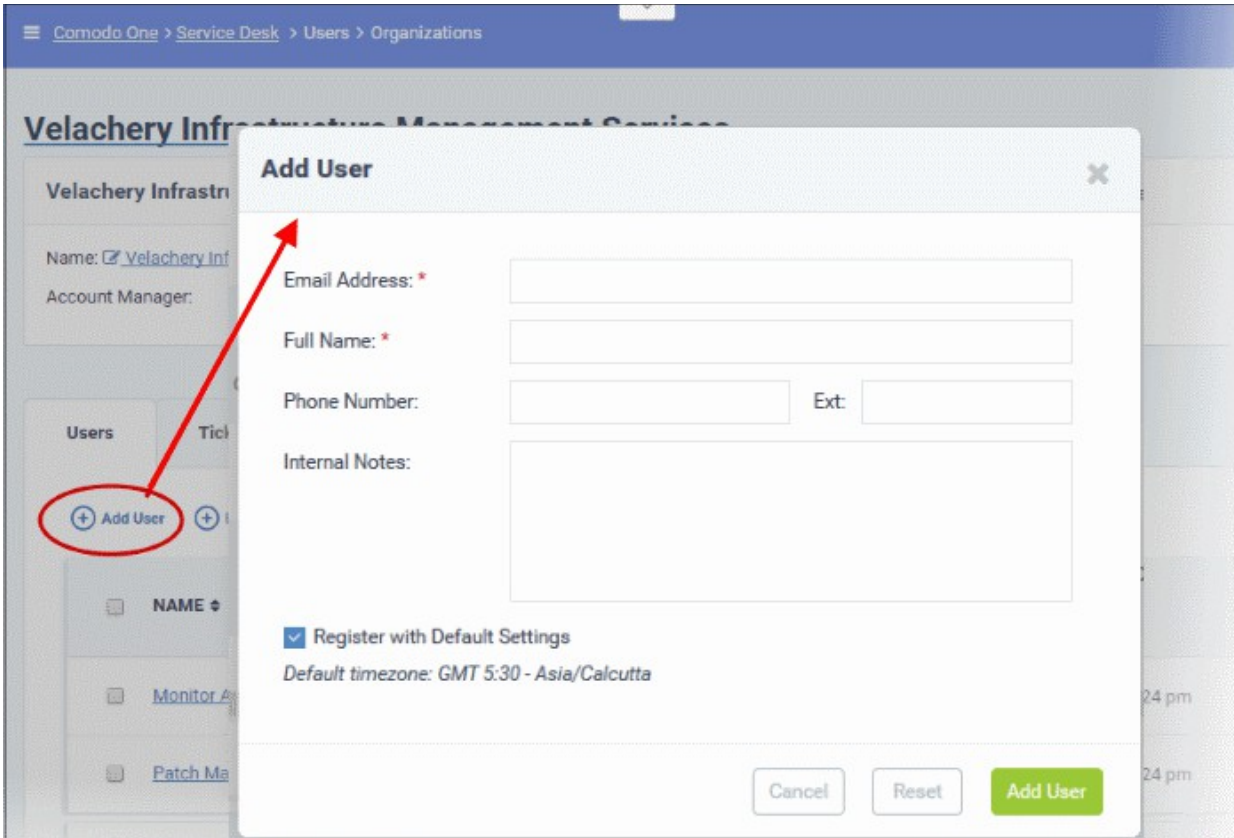
The following sections explain more about:

- **Manually add users to an organization**
- **Import users from a list**
- **Remove users from an organization**

Manually add users to an organization

- Click 'Users' on the left then 'Organizations'
- Click the name of the organization to open its details interface
- Click the 'Users' tab to view a list of users belonging to the organization.
- Click 'Add User' at the top

The 'Add User' screen will open:



The screenshot shows the 'Add User' form in the Comodo One Service Desk interface. The form is titled 'Add User' and contains the following fields:

- Email Address: *
- Full Name: *
- Phone Number: (with an 'Ext.' field)
- Internal Notes:

At the bottom of the form, there is a checkbox for 'Register with Default Settings' and a note: 'Default timezone: GMT 5:30 - Asia/Calcutta'. The form has three buttons at the bottom: 'Cancel', 'Reset', and 'Add User'.

- **Email Address:** Enter the email address of the user. This is used for signing into the web portal after registration is complete.
- **Full Name:** Enter the name of the user.
- **Phone Number:** Enter the contact phone number of the user.
- **Internal Notes:** Enter any notes regarding the user.

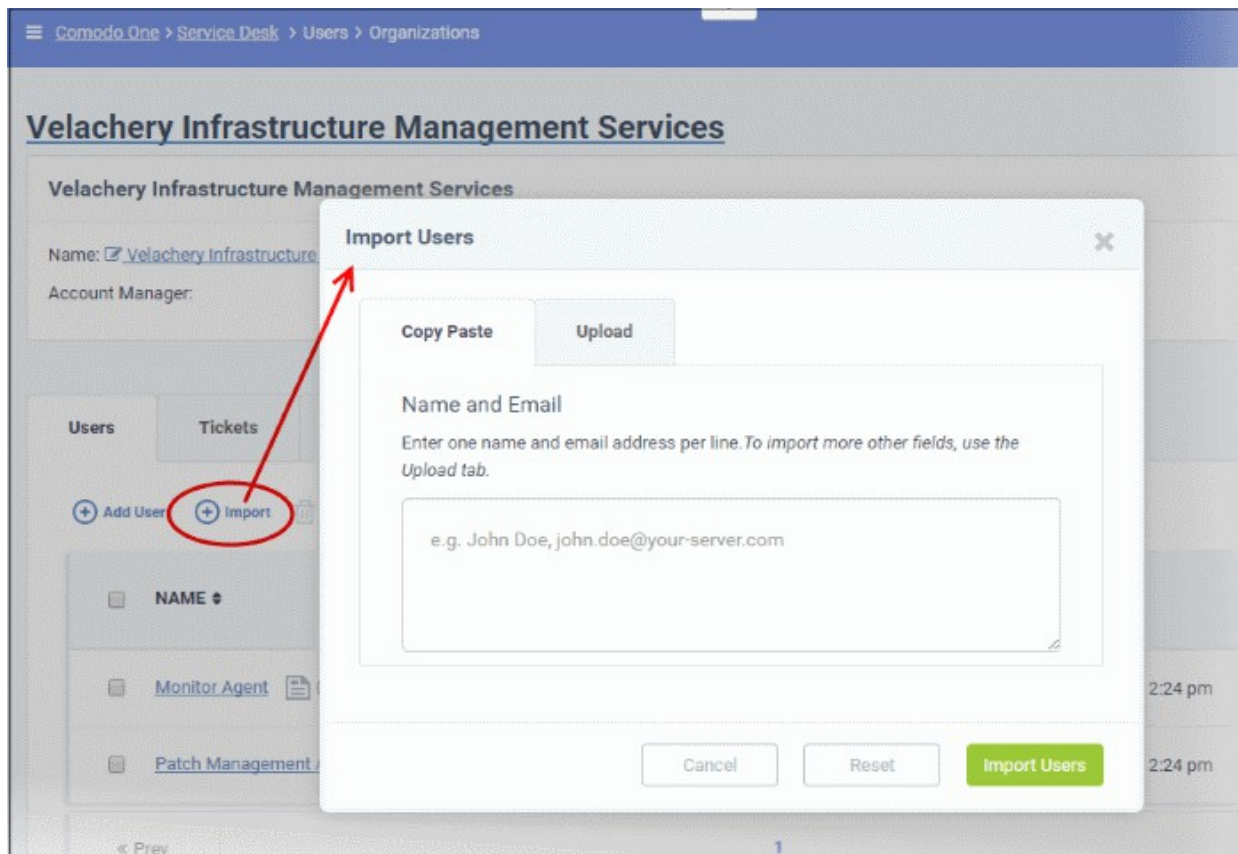
The fields available in the form above are fetched from the built-in 'Contact Information'. This screen can be accessed via Admin Panel > Manage > Forms > Contact Information.

- Click the 'Add User' button. The user will be added to the organization.
- Repeat the process to add more users

Import users to an organization

- Click 'Users' on the left then 'Organizations' to open the 'Organizations' interface
- Click the name of the organization to open its details interface
- Click the 'Users' tab to view a list of users belonging to the organization.
- Click the 'Import' link at the top right

The 'Import Users' screen will be displayed:



The 'Copy Paste' method allows you to import users with name and email details only.

- Enter the full name followed by a comma and the email address of the user
- To import more users, add more user details in subsequent lines
- Click the 'Import Users' button to add the users as guest users to the organization

The 'Upload' method allows you to import users from a CSV file.

Import Users [X]

Copy Paste **Upload**

Import a CSV File

Use the columns shown in the table below. To add more fields, visit the Admin Panel -> Manage -> Forms -> Contact Information page to edit the available fields. Only fields with `variable` defined can be imported.

Email	Name	Phone	Notes
john.doe@your-server.com	John Doe		

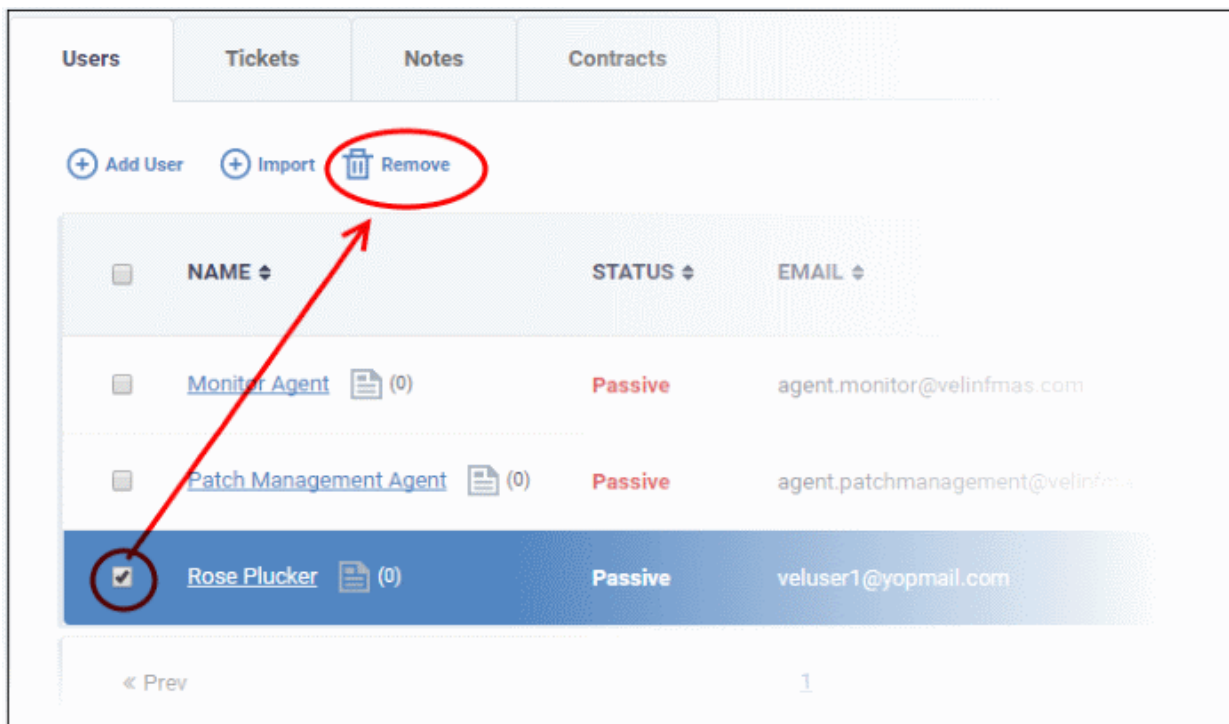
No file chosen

You can add more fields for the users from the 'Admin Panel' > 'Manage' > 'Forms' > 'Custom Form' interface.

- Create a .csv file containing a list of users with the values for the parameters as shown in the Import a CSV file dialog.
- Click the 'Choose File' button, navigate to the CSV file on your computer and click the 'Import Users' button.

Remove users from an organization

- Click 'Users' on the left then 'Organizations' to open the 'Organizations' interface
- Click the name of the organization to open its details interface
- Click 'Users' tab. The list of users belonging to the organization will be displayed.
- Select the user(s) to be removed and click the 'Remove' button



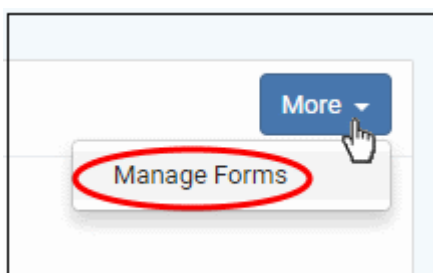
- Click 'Yes, Do it' in the confirmation dialog to remove the user.

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

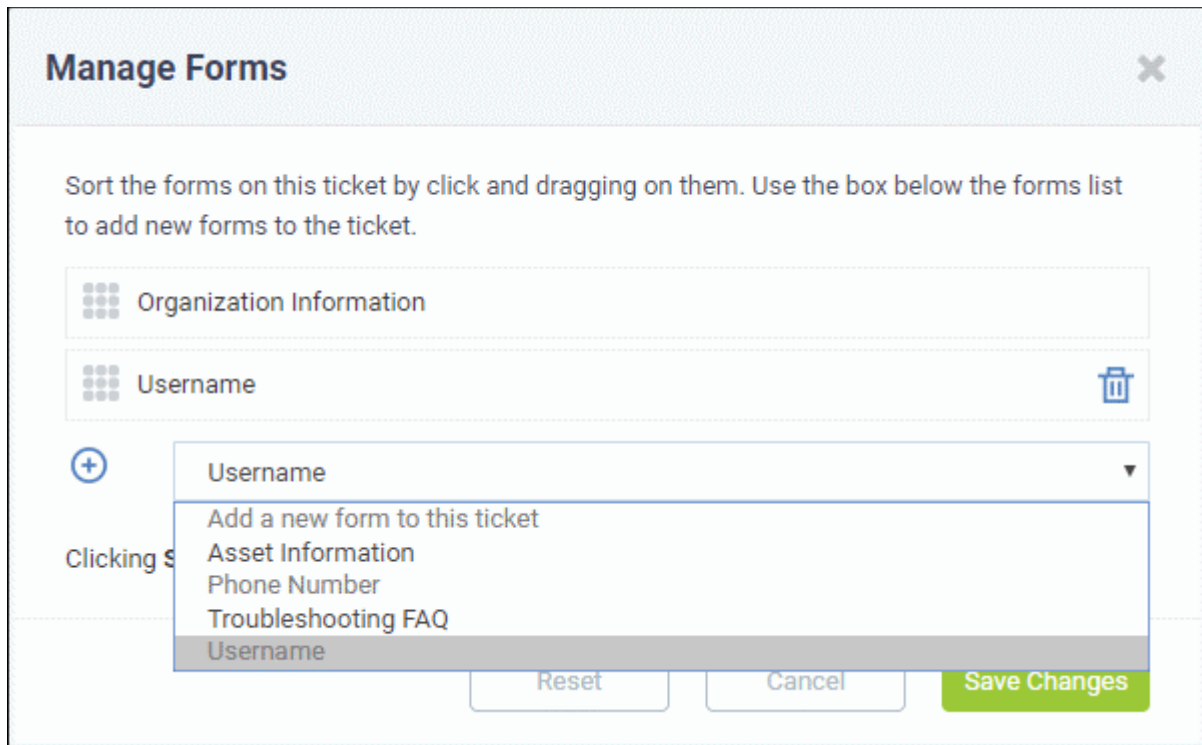
Manage Forms for the Organization

By default, the 'Organization Information' of an organization is mandatory and staff members can add more form fields to include more details about the organization.

- Click 'Users' on the left then 'Organizations' to open the 'Organizations' interface
- Click the name of the organization to open its details interface
- Click the 'More button at the top right and choose 'Manage Forms'



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



- Select the required form to be added for the organization from the drop-down. The 'Forms' that are listed here can be added by Administrators in the 'Admin Panel' > 'Manage tab' > 'Forms' > 'Add Custom Form'.
- Click the 'Save Changes' button.

After adding the new form, staff members can update the organization's details by clicking the organization's name in the 'Organization Details' interface.

Velachery Infrastructure Management Services [X]

Fields Settings

Organization Information: Details on user organization

Name: * Velachery Infrastructure Management Services

Web Domain: * velinfmas.com

Address: 133, Captain Road, Velachery

Phone: 85296314 Ext:

Website: www.velinfmas.com

Internal Notes:

Type: Non-managed

Cancel Reset Update Organization

- Complete the form and click the 'Update Organization' button at the bottom.
- To remove a form for the organization, open the 'Manage Form' screen by clicking 'More' from the Organization Details screen and click the trash can icon beside the form name.

Manage Forms [X]

Sort the forms on this ticket by click and dragging on them. Use the box below the forms list to add new forms to the ticket.

Organization Information

Asset Information [Trash]

Troubleshooting FAQ [Trash]

+ Troubleshooting FAQ ▼

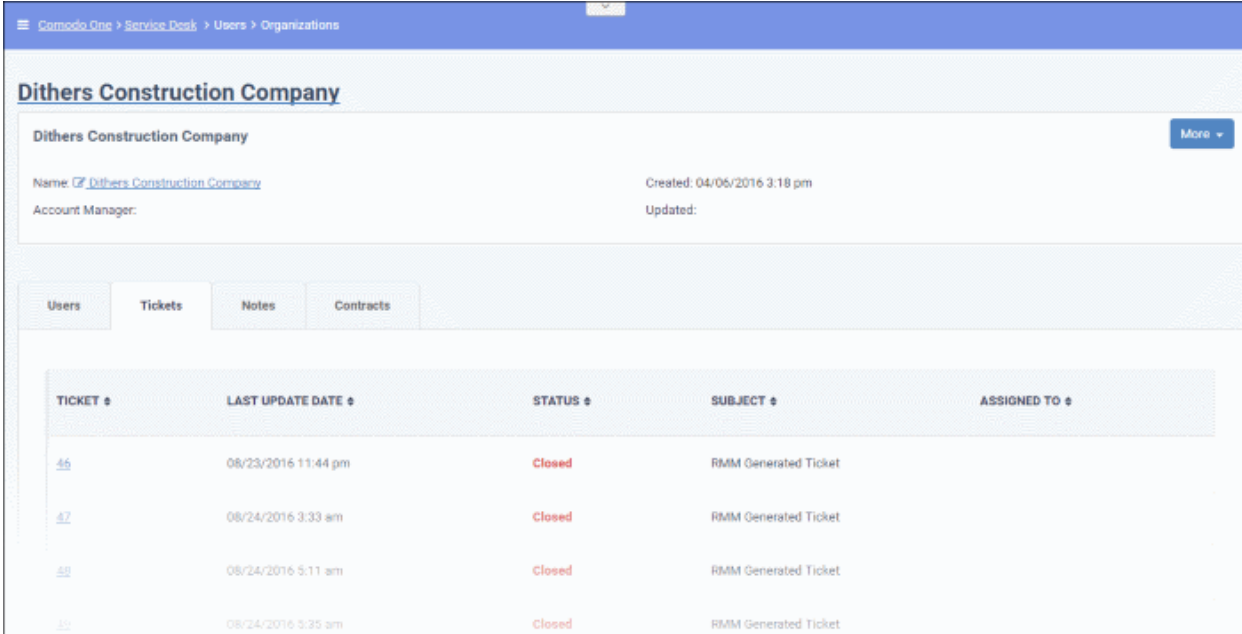
Reset Cancel Save Changes

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

Manage tickets raised by users in an organization

Tickets that are raised by users in an organization can be managed from the 'Organizations' interface.

- Click the 'Users' tab in the 'Staff Panel' and choose 'Organizations'
- Click the name of an organization to open its details interface
- Click the 'Tickets' tab



The screenshot shows the 'Organizations' interface for 'Dithers Construction Company'. The page includes a header with the company name and a 'More' button. Below the header, there are tabs for 'Users', 'Tickets', 'Notes', and 'Contracts'. The 'Tickets' tab is active, displaying a table of tickets. The table has the following columns: TICKET #, LAST UPDATE DATE, STATUS, SUBJECT, and ASSIGNED TO. The tickets listed are:

TICKET #	LAST UPDATE DATE	STATUS	SUBJECT	ASSIGNED TO
46	08/23/2016 11:44 pm	Closed	RMM Generated Ticket	
47	08/24/2016 3:33 am	Closed	RMM Generated Ticket	
48	08/24/2016 5:11 am	Closed	RMM Generated Ticket	
49	08/24/2016 5:35 am	Closed	RMM Generated Ticket	

The screen will display the list of tickets created by the users for that organization and ticket that was raised last will be shown at the top of the list.

Column Headers

- **Ticket:** The number assigned to the ticket. Clicking on the ticket number will open the 'Ticket Details' screen. See '[Managing 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:** 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 assigned.

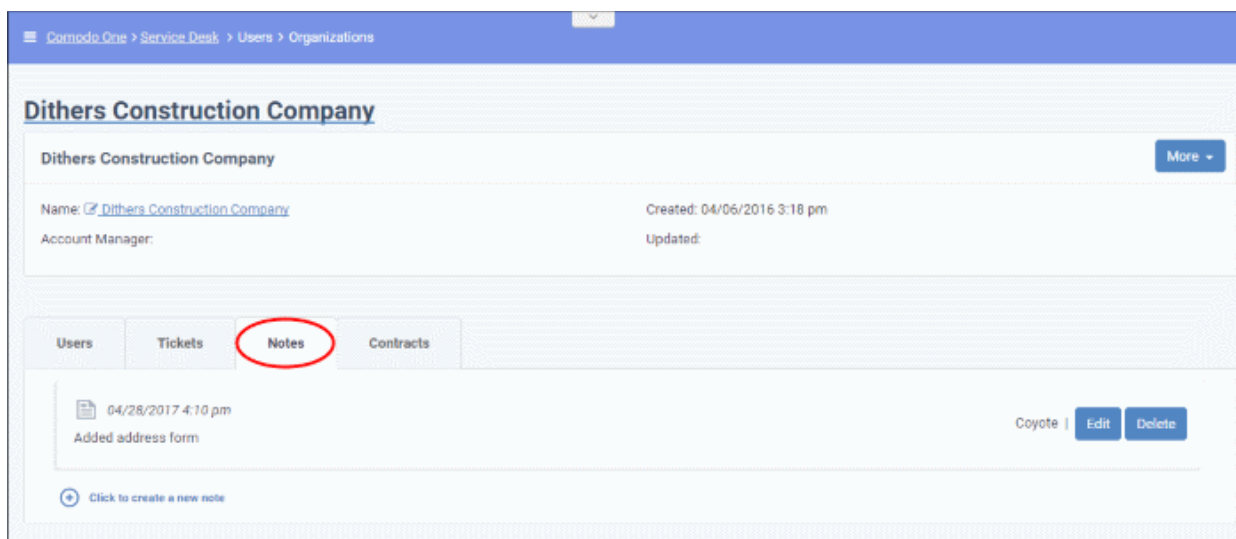
Placing the mouse cursor over a ticket number will display a call out providing the details of the ticket.

The ticket preview allows staff members to view the details and the links at the bottom to manage it. See '[Managing Tickets](#)' for more details.

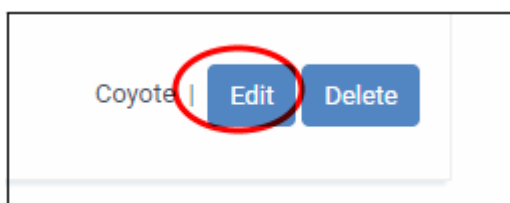
Manage notes

Notes feature helps to keep a record of the changes done to the organization's details or can be used by staff members for any other purpose as required. This will be visible only to staff members.

- To manage notes, click the 'Notes' tab in the 'Organization Details' interface



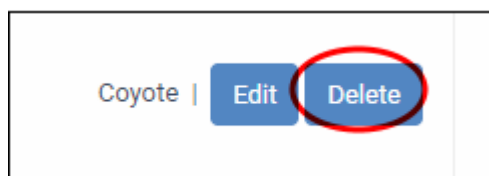
- To add new notes, click the 'Click to create a new note' link, add the required content and then click the 'Create' button at the bottom.
- To edit a note, click the 'Edit' button at the far end of the note.



- 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 of an organization

The Organization Details interface allows staff members to view the list of contracts associated with an organization.

Service Contract

Service Desk allows admins/staff members to create service contracts with organizations as required. Contracts can include:

- A weekly/bi-weekly/monthly/yearly fee

- Pre-paid hours for different service types ('On-site', 'Remote' and 'Telephone'). Work done under prepaid hours is not added to the monthly bill.
- A charging plan for time spent on service sessions that exceed the pre-paid hours (optional). The charging plan includes:
 - A 'default' hourly rate which is applied to sessions not covered by a variable rate.
 - Variable rates for specific types of service (optional).
 - Charging plans are only applied after any pre-paid hours have been used up.
 - Charging plans can be created and managed by admins from the 'Admin Panel' ('Admin Panel' > 'Manage' > 'Charging').
 - If no charging plan is applied then the default plan is applied. The default charging plan can be managed from the Admin Panel ('Admin Panel' > Manage > Assets interface).
 - For more details on default and custom charging plans, See <https://help.comodo.com/topic-289-1-625-12458-Manage-Charging-Plans.html>
 - For more details on the service contracts, refer to **Manage Contracts**.

To view contracts

- Open the 'Staff' panel (see last link on the left)
- Click 'Users' on the left then choose 'Organizations' to open the 'Organizations' interface
- Click the name of the organization to open its details interface
- Click the 'Contracts' tab

Dithers Construction Company

Dithers Construction Company More ▾

Name: [Dithers Construction Company](#) Created: 02/21/2018 2:58 pm
Account Manager: Updated: 02/21/2018 2:58 pm

Users **Tickets** **Notes** **Contracts**

Remove Showing 1 - 1 of 1

<input type="checkbox"/>	CONTRACT NAME ⇅	TICKETS COUNT ⇅	PREPAID HOURS ⇅	RELATED BILLABLE HOURS (SUM) ⇅	REMAIN BILLABLE HOURS (SUM) ⇅
<input type="checkbox"/>	Dithers Contract 2018-2019	0	299	0	299

« Prev 1 Next »

The contracts details screen of the 'Organization' will be displayed.

- **Contract Name:** Name of the contract created for the organization. Clicking the name opens the 'Contract Details' screen.

- **Ticket Count:** Number of tickets associated with the organization.
- **Pre-paid Hours:** The pre-paid hours mentioned in the contract.
- **Related Billable Hours (Sum):** Total chargeable hours spent by staff working on tickets for the organization on all three service types (Onsite, Remote and Telephone).
- **Remaining Billable Hours (Sum):** Amount of hours left of the organization's total pre-paid hours.
- To remove a contract from an organization select the contract, click 'Remove' and confirm the action from the confirmation dialog

Remove Unmanaged Organizations

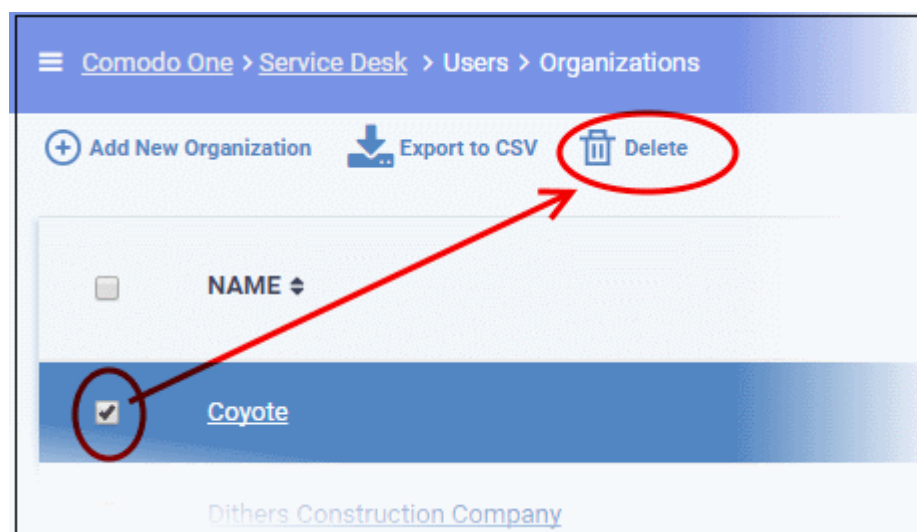
- Organizations added via the C1 interface are assigned 'Managed' status and automatically imported into Service Desk. 'Managed' organizations cannot be removed because they are also enrolled into other C1 services like ITSM, Patch Management and RMM.
- Organizations which are added via the Service Desk interface are assigned 'Unmanaged' status. 'Unmanaged' organizations can be removed because they only exist in Service Desk and not other C1 modules.
- You can only remove unmanaged organizations that have no enrolled users.
- If you remove an organization, all details pertaining to it will also be removed.

To remove organizations

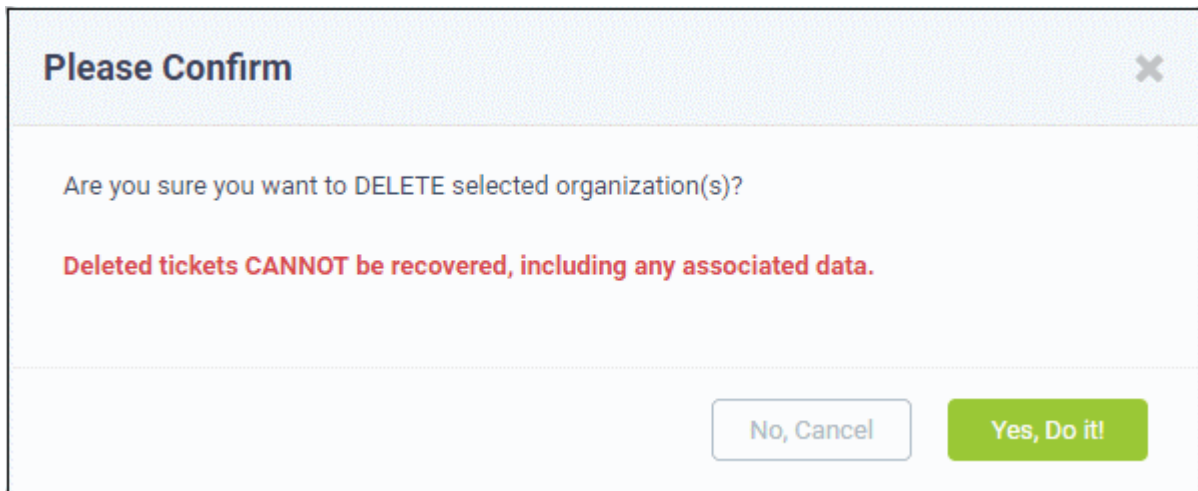
- Click ' Staff Panel' (if required) > 'Users' > 'Organizations' to open the 'Organizations' interface
- Select the organizations you want to remove
- Click the 'Delete' link

Note: Remove any users from an organization before attempting to remove the organization itself. Organizations with users, including default users, cannot be deleted. See [Managing Users of an Organization](#) for more details.

- Click 'Delete' at the top.

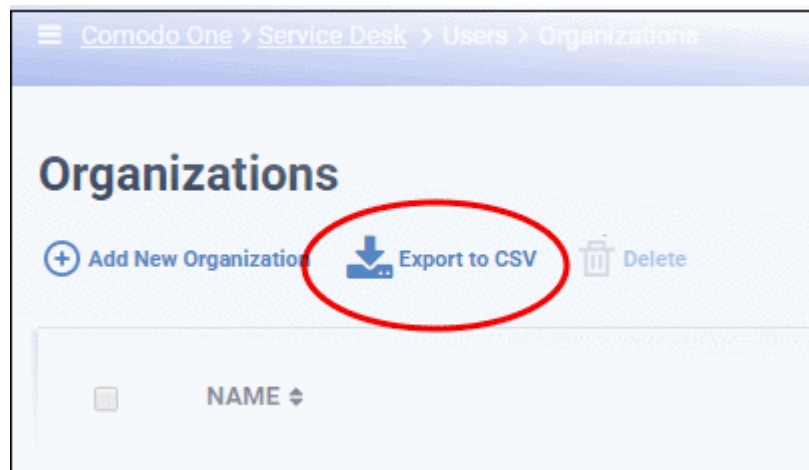


- Click 'Yes, Do it!' in the confirmation dialog to remove the unmanaged organization



Export organizations list to a CSV file

- Click the 'Export' link at the top of the interface to download a list of all current Service Desk organizations.



The list will be exported in .csv format. It can be opened with any spreadsheet application such as Microsoft Excel or Open Office Calc.

2.3 Manage Tickets

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

Tickets can be submitted to C1 using the following interfaces:

- **Web portal** - Registered users can login to the web portal at the helpdesk 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 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** - Tickets can be automatically generated by ITSM, RMM and Patch Manager upon specific events.
 - Endpoint users can also submit tickets by right-clicking the ITSM icon in the system tray.
 - Such users are automatically added as guests in Service Desk.

- **Custom applications** - Customers can integrate their systems with Service Desk by using the service desk API. Integrated applications can then submit tickets to Service Desk.

To open the 'Tickets' interface,

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









TICKET #	LAST UPDATE DATE	SUBJECT	FROM	PRIORITY	DEVICE NAME	ASSIGNED TO	CUSTOMER
441	09/28/2018 4:17 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D806VJU	frontlok	
442	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D806VJU	frontlok	
443	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D806VJU	frontlok	
444	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D806VJU	frontlok	
445	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D806VJU	frontlok	
446	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D806VJU	frontlok	
447	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D806VJU	frontlok	
448	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D806VJU	frontlok	
449	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D806VJU	frontlok	
450	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D806VJU	frontlok	
451	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantitude	Normal	DESKTOP-D806VJU	frontlok	
452	09/16/2018 11:49 am	Provide access to data...	national services	Normal		frontlok	

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. 'Assigned' and 'Answered' tickets may be excluded from this view by admins. Click the ticket number/subject to answer, transfer, reassign or schedule an open ticket.
- **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 to a staff member. Admins can assign tickets to staff by clicking the ticket number/subject then the 'Assign' link at the top. See **Assign tickets to a specific staff member** 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 were not closed within the stipulated period per the SLA plan. Overdue tickets will be closed automatically if set by an administrator.
- **Closed:** Tickets that are closed. 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 material costs and other expense items added to tickets by staff. Costs and expenses need to be approved by an administrator. 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:

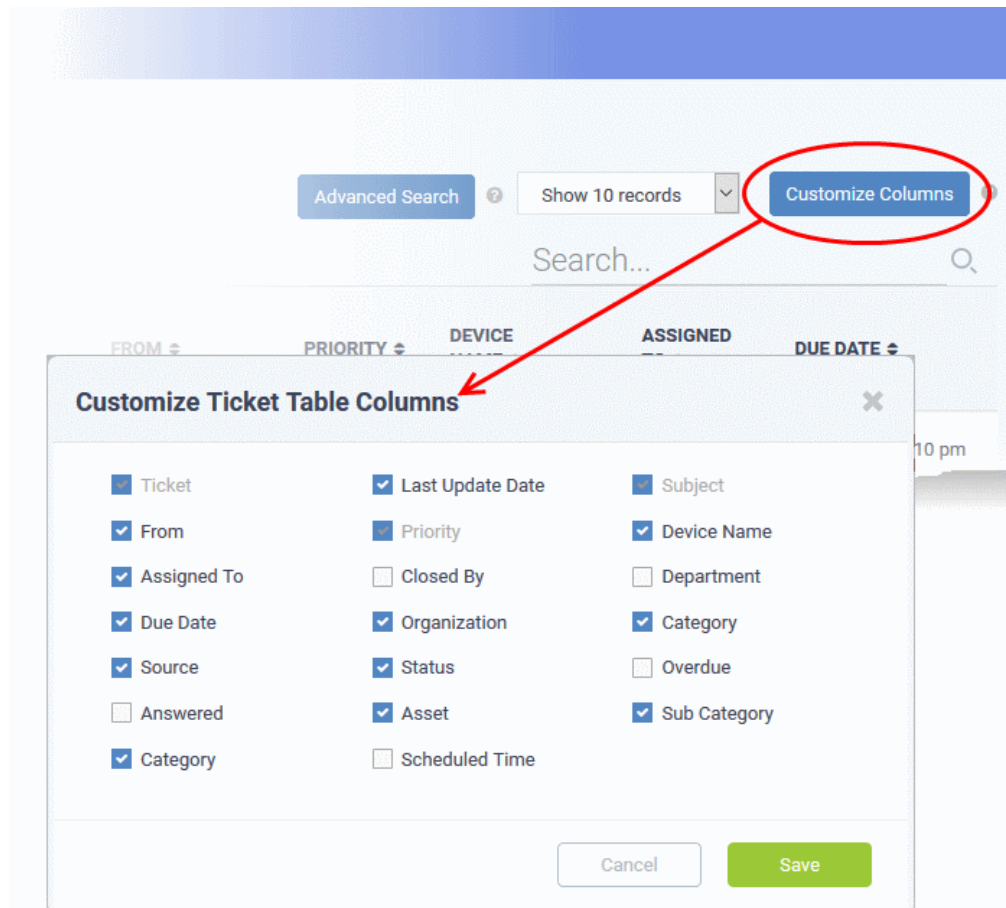
Tickets - Table of Column Descriptions	
Column Header	Description
Ticket	<p>The number assigned to the ticket. Clicking the ticket number will open the 'Ticket Details' screen.</p> <ul style="list-style-type: none">  - Tickets that were raised via the web portal.  - Tickets that were raised via email.  - 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	<p>A brief description of the issue.</p> <ul style="list-style-type: none"> 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'. <p>The icons in the subject column indicate the status of the ticket.</p> <ul style="list-style-type: none">  - Indicates the ticket is overdue. The issue covered in the ticket was not resolved within the time stipulated in the SLA.  - Indicates the ticket has been locked by a staff member.  - Indicates actions have been taken on the ticket. Actions can be replies, internal notes or other status updates.  - Indicates the ticket has an attachment(s)  - Indicates that collaborators have been added to the CC list for the ticket
From	The name of the user that raised the ticket.
Priority	The priority 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 tab (under the 'Incoming Emails' section). If not enabled, they will have a priority of 'Normal'. Please note that when tickets are filtered via ' Ticket Filters ', the priority setting in the filter will prevail.
Device Name	The device for which the ticket was generated. C1 modules such as ITSM, RMM and Patch Management can automatically create tickets for devices if certain conditions are met. This column displays the name of the device for which the ticket was created.
Assigned To	<p>The name of the column header changes depending on the ticket status that you have selected. For example, for 'Unassigned' tickets the column header will be 'Department'.</p> <ul style="list-style-type: none"> Assigned To: The name of the staff member to whom the ticket is assigned

	<ul style="list-style-type: none"> • Department: The name of the department to which the ticket is assigned
Organization	The organization/company of the user who raised the ticket
Source	The channel through which the ticket was created. Possible channels are: <ul style="list-style-type: none"> • Phone • Email • Other • Web • API
Sub Category	The sub category of the issue as entered during its creation
Department	The Service Desk department 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: <ul style="list-style-type: none"> • Open • Answered • Overdue • Closed • Paused
Ticket Category	Displays the help topic on which the user requested support.
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	Indicates the asset type for which the issue was reported.
Category (Ticket Type)	The support category of the ticket. The possible values are: <ul style="list-style-type: none"> • 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.

Add and 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:

TICKET ▾ LAST UPDATE DATE ↕ SUBJECT ▾ FROM ▾ PRIORITY ▾ DEVICE NAME

761

Ticket #761: System is heating too much

Ticket Summary

Ticket State: Open Normal
Create Date: 02/09/2018 4:56 pm
Due Date: 02/14/2018 12:32 pm
Assigned To:
From: [bsa bsachampstar@gmail.com](mailto:bsa@bsachampstar@gmail.com)
Department: Maintenance
Categories: Asset Issue / Report a Problem

[Thread \(2\)](#) | [Notes \(3\)](#) | [Reply](#) | [Reassign](#) | [Transfer](#) | [Post Note](#) | [Edit Ticket](#)

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 tickets to a different person and update items such as user information, ticket category, department and collaborators.
 - Alternatively, you can edit individual tickets by opening the ticket and clicking the 'Edit' button.
- The process feature is available for all ticket categories except closed tickets.

To use the process option

- 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 'Process' at the top:

My Tickets

Mark Overdue Close Delete Assign Export to CSV **Advanced**

Schedule **Process**

<input type="checkbox"/>	TICKET ▾	LAST UPDATE DATE ↕	SUBJECT ▾	FROM ▾	PRIORITY ▾
<input checked="" type="checkbox"/>	32	02/11/2018 3:38 pm	Not able to access sharepoint	Peter Pan	Low
<input type="checkbox"/>	702980	02/09/2018 3:42 pm	Screen half blank 🐛	Elizabeth Ford	High
<input type="checkbox"/>	943117	09/28/2017 7:24 pm	Printer maintenance	Blondie Darwood	Normal

The 'Process Ticket' screen will open:

Process Ticket #32

User Information: Currently selected user
Peter Pan <peterpan@ditherscons.com> [Change](#)

Issue Summary:

Issue Description:

Ticket Information: Due date overrides SLA's grace period.

Ticket Source:

Category:

Department:

SLA Plan:

Time Spent: 0 hrs 0 min

Due Date:
Time is based on your time zone (GMT+5.30)

Assign The Ticket

Assignee:
Ticket is currently assigned to Coyote

Comments:

Collaborators

[Add New Collaborator](#)

[Process](#) [Cancel](#)

User Information

- **User name:** This will be pre-populated. Click 'Change' to update user details.

- **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. See '**Ticket Categories**' 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 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 admin/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.

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.

Ticket #2: Add a collaborator [X]

Search existing users or add a new user.

Search by email, phone or name

Email Address: * [Input Field]

Full Name: * [Input Field]

Phone Number: [Input Field] Ext: [Input Field]

Internal Notes: [Text Area]

Register with Default Settings
Default timezone: GMT 5:30 - Asia/Calcutta

[Cancel] [Reset] [Add User]

- To add an existing user, type the first few letters of their username/email address in the 'Search' box at the top. Select the correct user from the suggested options
- To add a new user, enter their email address, full name and other contact 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. Examples may include site visits and fixed maintenance tasks.

- The schedule will be added to the calendar of the currently logged-in admin/staff.
- The ticket will be assigned to the person who creates the schedule, even if 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:

Open Tickets

Search...

<input type="checkbox"/>	TICKET	LAST UPDATE DATE	SUBJECT	FROM	PRIOR
<input checked="" type="checkbox"/>	762	02/12/2018 1:10 pm	System Shaking	bsa	Normal
<input type="checkbox"/>	32	02/11/2018 3:38 pm	Not able to access sharepoint	Peter Pan	Low

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

Ticket #undefined: undefined

Day < 12 Feb 2018 - 18 Feb 2018 > My Calendar

	Mon, February 12	Tue, February 13	Wed, February 14	Thu, February 15	Fri, February 16	Sat, February 17	Sun, February 18
9 ⁰⁰							
10 ⁰⁰		09:45 - 10:00 check manually onsite					
11 ⁰⁰		10:45 - 11:00 attend this ticket					
12 ⁰⁰		12:00 - 12:15 make a site visit					
13 ⁰⁰							
14 ⁰⁰							
15 ⁰⁰							
16 ⁰⁰							
17 ⁰⁰							
18 ⁰⁰							
19 ⁰⁰							

- The current week is shown by default. You can view the current week or day by clicking the respective button above the calendar.
- Use the < > buttons above the table to move to next week/day
- Double-click on the time slot you wish to assign to the ticket
- Enter a short description of the task to be executed.

	Mon, February 12	Tue, February 13	Wed, February 14
9 ⁰⁰			
10 ⁰⁰		09:45 - 10:00 check manually onsite	
11 ⁰⁰		10:45 - 11:00 attend this ticket	
12 ⁰⁰		12:00 - 12:15 make a site visit	
13 ⁰⁰			
14 ⁰⁰		13:45 - 14:00 make a site visit to check	
15 ⁰⁰			

- 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 'Scheduled' category on the left.

View Materials/Expense Items added to a Ticket

- The 'Tickets' section allows staff and admins to view costs added to tickets.
- Administrators must approve expense items in order for them to be billed to the client organization.

To view the materials/expense items

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

MATERIAL NAME	TICKET #	COST	DATE ADDED	LAST UPDATED	STATUS
Ink Cartridge Holder	22	8.00	04/21/2016 3:20 pm		Awaiting
HP Ink Cartridge	22	40.00	04/21/2016 3:20 pm		Awaiting
4 GB RAM	23	34.99	04/25/2016 12:25 pm		Awaiting
Mileage	23	5.00	04/25/2016 12:25 pm		Awaiting
Toll	34	25.00	07/19/2016 4:33 pm		Awaiting
HP Ink Cartridge	448	100.00	12/02/2016 3:41 pm		Awaiting
4 GB RAM	448	2000.00	12/02/2016 3:41 pm		Awaiting
Ink Cartridge Holder	448	40.00	12/02/2016 3:42 pm		Awaiting
HP Ink Cartridge	448	50.00	12/02/2016 3:43 pm		Awaiting
4 GB RAM	448	1900.00	12/02/2016 3:43 pm		Awaiting

Column Headers

- **Material Name** - The name of the material or expense item added to the ticket
- **Ticket #** - The number of the ticket to which the material was added. Click the ticket number to view or update the ticket. See **Ticket Details** for more details.
- **Cost** - Cost of the material/expense item as entered by the staff member
- **Date Added** - Date and time when the item was added to the ticket
- **Last Updated** - Date and time when materials on the ticket were last modified.
- **Status** - Whether or not the material/expense has been approved by an administrator. The possible states are:
 - Awaiting - The item has been added to a ticket but not yet approved by an administrator.
 - Approved - The item has been added to a ticket and approved for billing by an administrator.
 - Rejected - The item has been declined 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 any list of tickets as a comma separated value (CSV) file.
- The exported file will list all tickets currently visible on the page. Use the page number links at the bottom of the page to view/export other pages in a category.

To save the list of tickets

- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the 'Export to CSV' 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

The screenshot shows the 'Service Desk' interface. On the left is a navigation menu with 'DASHBOARD', 'USERS', and 'TICKETS'. The 'TICKETS' section is expanded, showing options like 'New Ticket', 'Open (396)', 'My Tickets (3)', 'Unassigned (393)', 'Answered (0)', 'Overdue (23)', 'Closed (44)', and 'Paused (0)'. The main area is titled 'Open Tickets' and contains a toolbar with buttons for 'Mark Overdue', 'Close', 'Delete', 'Assign', 'Export to CSV' (circled in red), and 'Schedule'. Below the toolbar is a search bar and a 'Show 25 records' dropdown. A table of tickets is displayed with columns for 'TICKET', 'LAST UPDATE DATE', 'SUBJECT', 'FROM', and 'PR'. Two tickets are visible: one with ID 440 and another with ID 439, both with the subject 'Second Monitor [Suspicious ...]' and from 'Avantistude'.

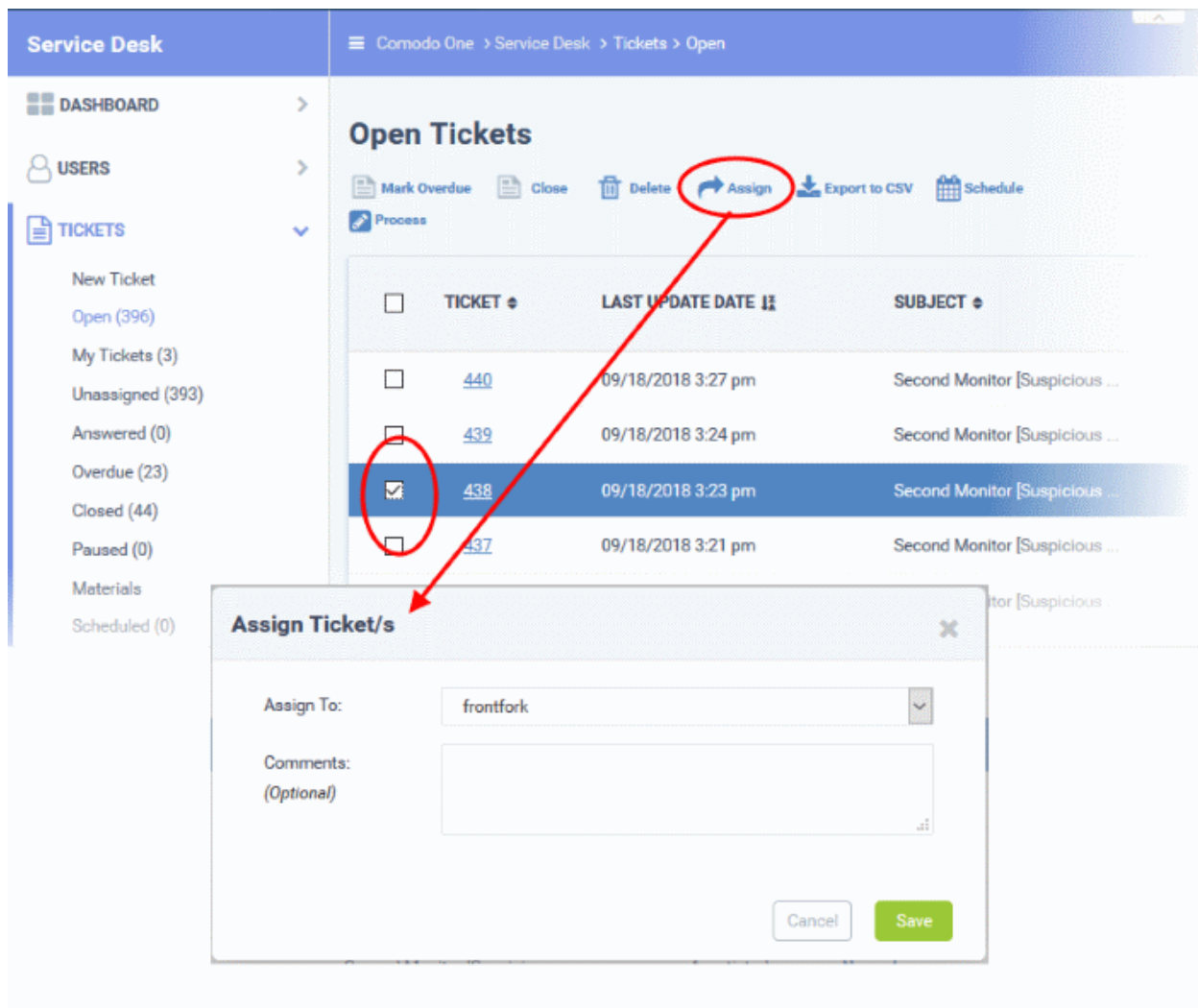
- Admins can assign/reassign tickets to staff from the 'Tickets' interface.
- The ticket will appear in the 'My Tickets' area of the person to whom it is assigned.

To assign tickets

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

The 'Assign Tickets' dialog will open.

- Assign to - Choose 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 can be viewed by the assigned staff member as an internal note in the ticket.
- Click 'Save'

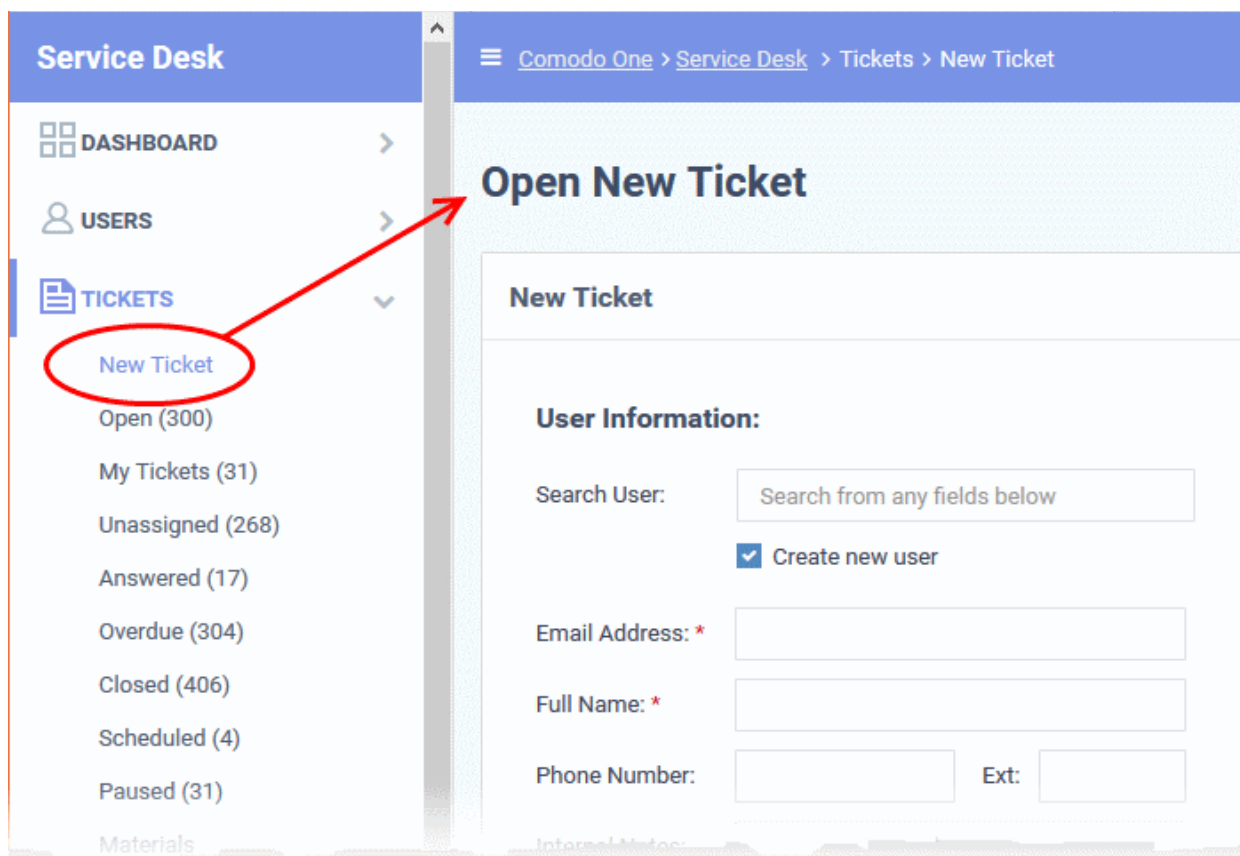
Create a new ticket on behalf of a user

- 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

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

User Information:

Search User:

Create new user

Email Address: *

Full Name: *

Phone Number: Ext:

Internal Notes:

Ticket Notice: Send alert to user.

- 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
 - 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 an organization in the 'User Directory' interface. See '**Add a user to an organization**' in **Managing Users** for more details.

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

Ticket Information & Options

Ticket Information & Options:

Ticket Source: * ▼

Category: * ▼

Schedule Time:

Department: ▼

SLA Plan: ▼
Due Date will be automatically generated based on Category, Department, SLA Plan, Hours of Operations and Custom Due Date Selection in order.

Due Date: * ▼ ▼ *Time is based on your time zone (GMT+5.30)*

Assign To: ▼

- **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.
- Use the < > buttons at the top to move to next week/day
- Double-click on the time slot you wish to reserve for the ticket
- Enter a short description of 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

Backdated Ticket: Work done in the past

Start Date: 

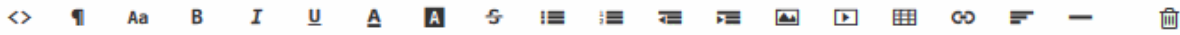
End Date: 

- **Work done in the past** - Create 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

Ticket Details: Please Describe Your Issue

Issue Summary: *



Details on the reason(s) for opening the ticket.

Priority Level: *

Asset Type:

Ticket Type:

Ticket Type Sub Category:

- **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

Response: Optional response to the above issue.

Canned Response:

Attachments: No file selected. *Response required for file upload*

Ticket Status: **Close On Response** (Only applicable if response is entered)

Signature: None Dept. Signature (if set)

- 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.

- **Signature:** Options are 'None' or 'Dept. 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 respectively. See '**Staff Members**' and '**Department**' for more details about adding signatures.

Internal Note

- Enter comments and reminders for staff who might work on the ticket. Internal notes are visible only to admins/staff and not to the end-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
 - Organization
 - 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

The screenshot shows the Service Desk interface. At the top, there is a blue header bar. Below it, a search bar contains the text "Search...". To the left of the search bar is a button labeled "Advanced Search", which is circled in red. To the right of the search bar are two buttons: "Show 10 records" and "Customize Columns". Below the search bar is a table with columns: "FROM", "PRIORITY", "DEVICE NAME", "ASSIGNED TO", and "DU". The first row of the table contains the text "ing for ... Coyoteewile", "Normal", "CW002", and "02/".

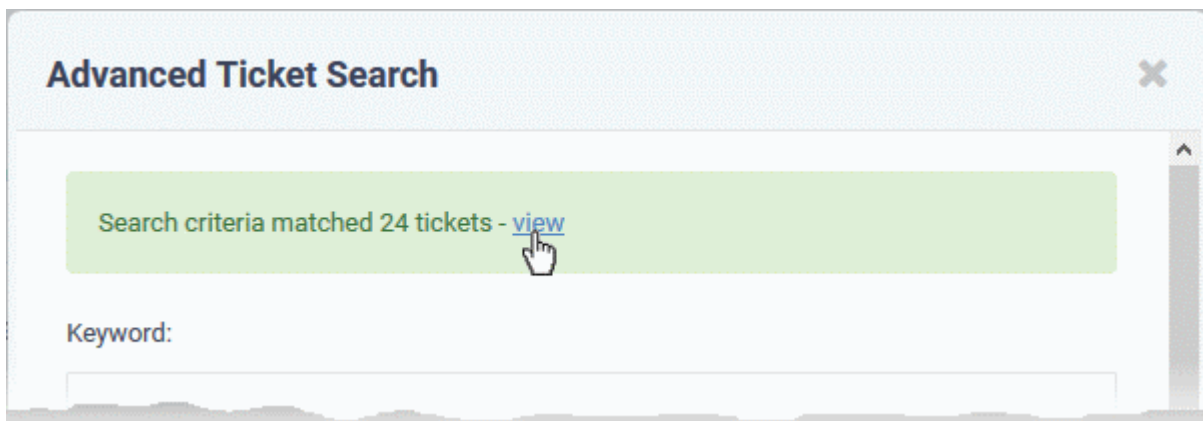
The "Advanced Ticket Search" modal window is open, showing the following search criteria:

- Keyword:
- (Optional)
- Organization:
- Org. Type:
- Status:
- Dept:
- Assigned To:
- Closed By:

At the bottom of the modal window, there are three buttons: "Search" (green), "Reset", and "Cancel".

- 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 'Staff Panel' > 'Tickets' > 'Open' (...or select a different 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:

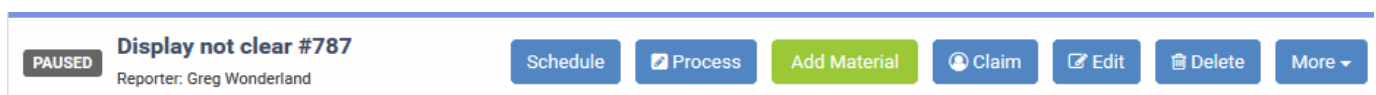
- **Title bar** - Shows basic ticket details and contains controls to manage the ticket. See '**Manage the Ticket**' for more details.
- **Ticket Information** - General details about the ticket.
- **Ticket Workflow** - Appears only for multi-stage tickets. Displays the status of successive stages of 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 ITSM.
- **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**

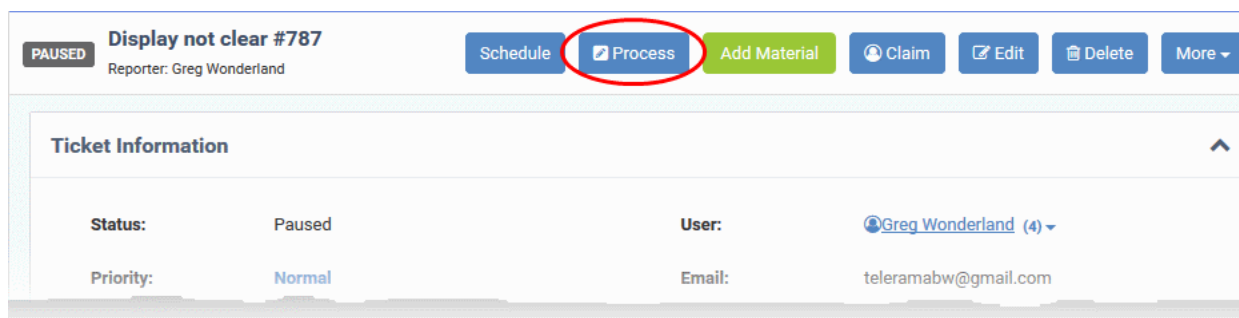
Process the Ticket

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

- 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 'Process' button at the top



The 'Process Ticket' pane will appear.

Process Ticket #787

User Information: Currently selected user
 Greg Wonderland <teleramabw@gmail.com> [Change](#)

Issue Summary:*

Issue Description: The display is not clear. The images are shown with dots.

Ticket Information: Due date overrides SLA's grace period.

Ticket Source:

Category:

Sub Category Level 1:

Department:

SLA Plan:

Time Spent: 0 hrs 0 min

Due Date: Time is based on your time zone (GMT+5.30)

Assign The Ticket

Assignee:
Ticket is currently assigned to Coyote

Comments:

Collaborators

[Add New Collaborator](#)

[Elizabeth Ford](#) ftinlizzie@yahoo.com

[Rich Cyclist](#) humbersafety@gmail.com

User Information

- **User name:** This will be pre-populated. Click 'Change' to update user details.
- **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 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.

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

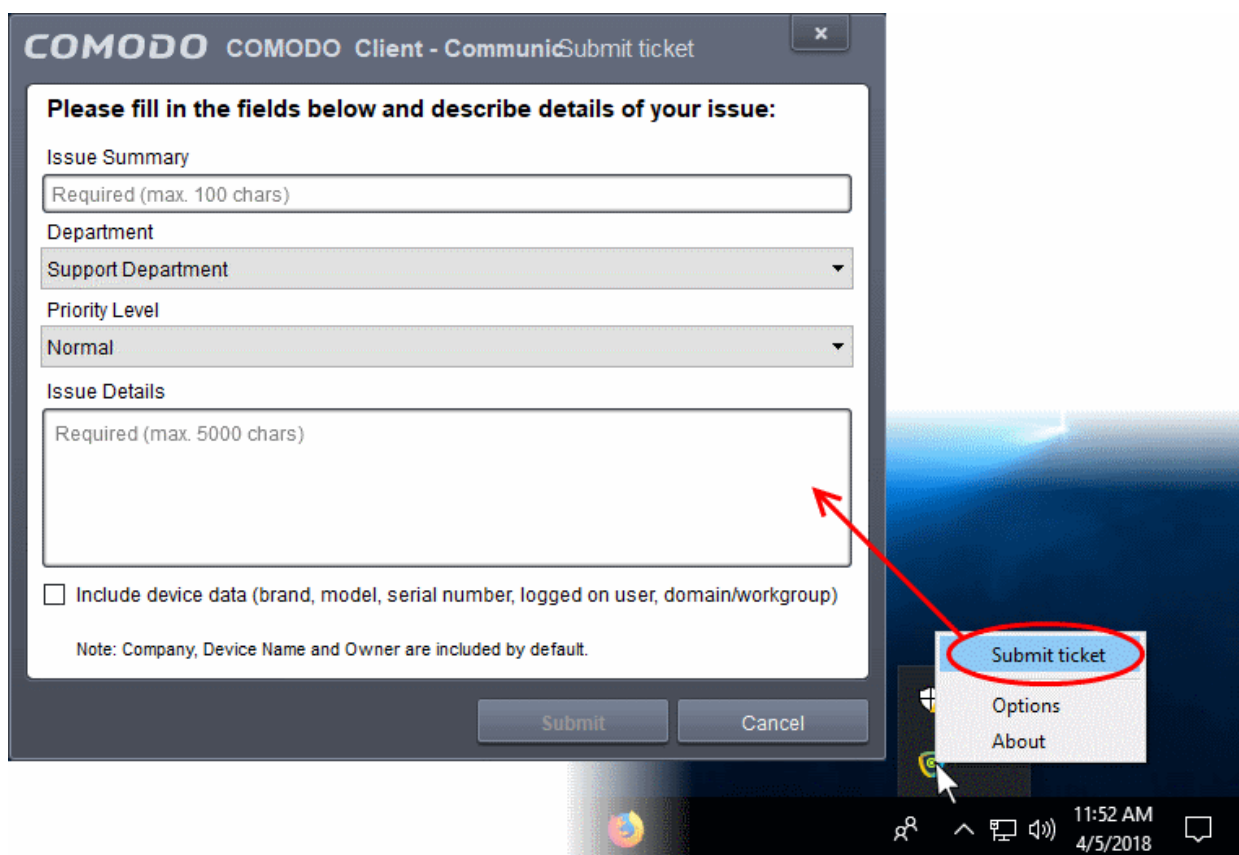
To add a new user:

- 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 help staff solve issues, install third party software or run system maintenance.

- 'Remote Control' is available only for tickets generated by the ITSM module.
- There are two ways in which ITSM can add tickets to Service Desk:
 - **Automatic** - ITSM monitors endpoint activity based on rules defined in a security profile on the endpoint. A Service Desk ticket is generated whenever a rule condition is breached.
 - **Manual** - Users can raise a support ticket by right clicking the ITSM system tray icon and selecting 'Submit Ticket':



- Admins and staff need to install 'Comodo Remote Control Viewer' 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 Comodo Remote Control Viewer](#)
- [Use the Desktop Application for Remote Control](#)

Download and install 'Comodo Remote Control' application

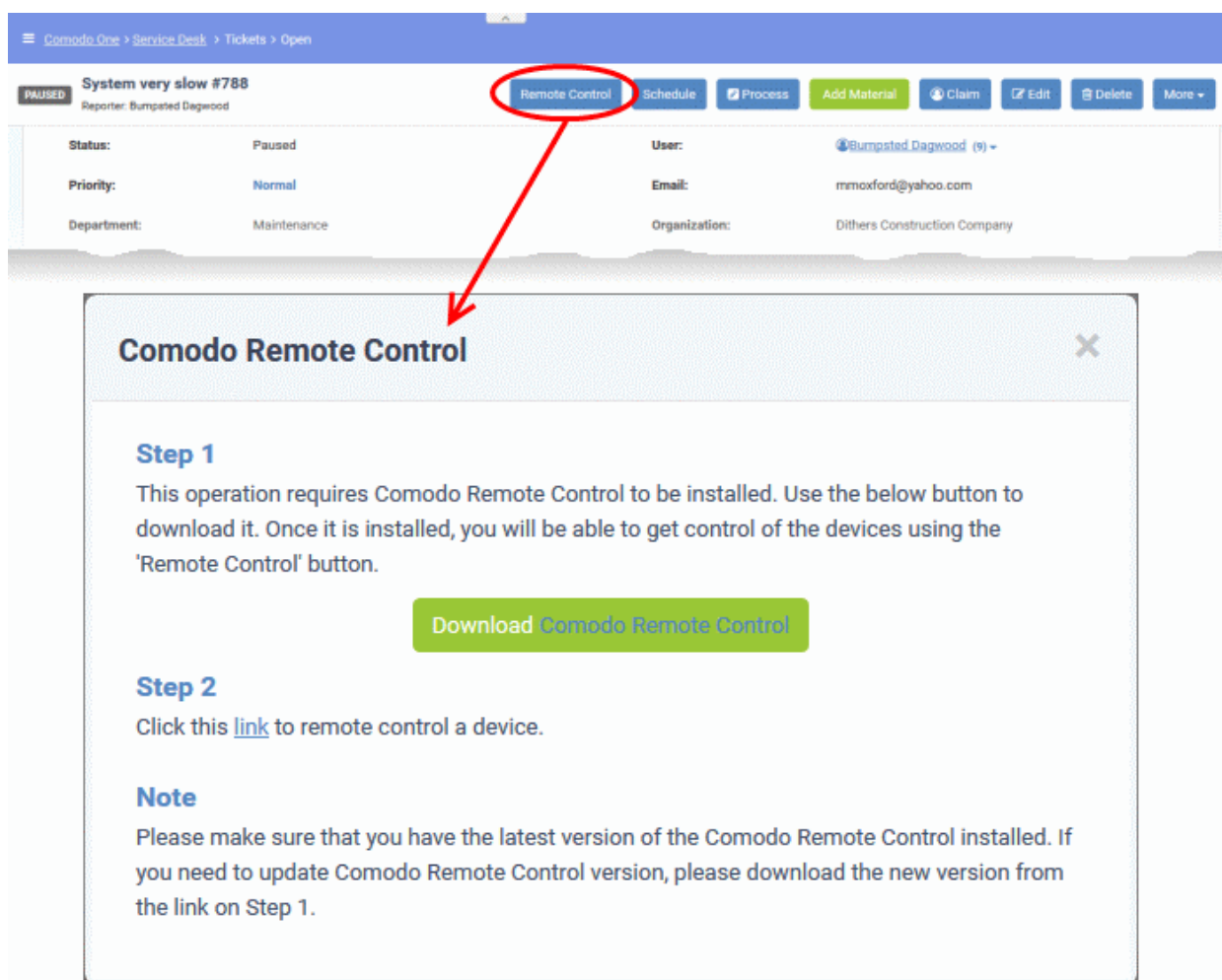
The Comodo Remote Control (CRC) application can be downloaded in two ways:

- [From Service Desk Console](#)
- [From Comodo One Console](#)

Download CRC from the Service Desk > Ticket Details interface

- 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 will be available only for tickets generated by the ITSM module.



The screenshot shows the Comodo One Service Desk interface. At the top, there is a navigation bar with 'Comodo One > Service Desk > Tickets > Open'. Below this, a ticket titled 'System very slow #788' is displayed, with the reporter 'Bumpsted Dagwood'. The ticket status is 'PAUSED'. A row of action buttons is visible: 'Remote Control' (circled in red), 'Schedule', 'Process', 'Add Material', 'Claim', 'Edit', 'Delete', and 'More'. Below the buttons, ticket details are shown in a grid format:

Status:	Paused	User:	Bumpsted Dagwood (9) ↓
Priority:	Normal	Email:	rmoxford@yahoo.com
Department:	Maintenance	Organization:	Dithers Construction Company

A modal window titled 'Comodo Remote Control' is open, containing the following text:

Step 1
This operation requires Comodo Remote Control to be installed. Use the below button to download it. Once it is installed, you will be able to get control of the devices using the 'Remote Control' button.

[Download Comodo Remote Control](#)

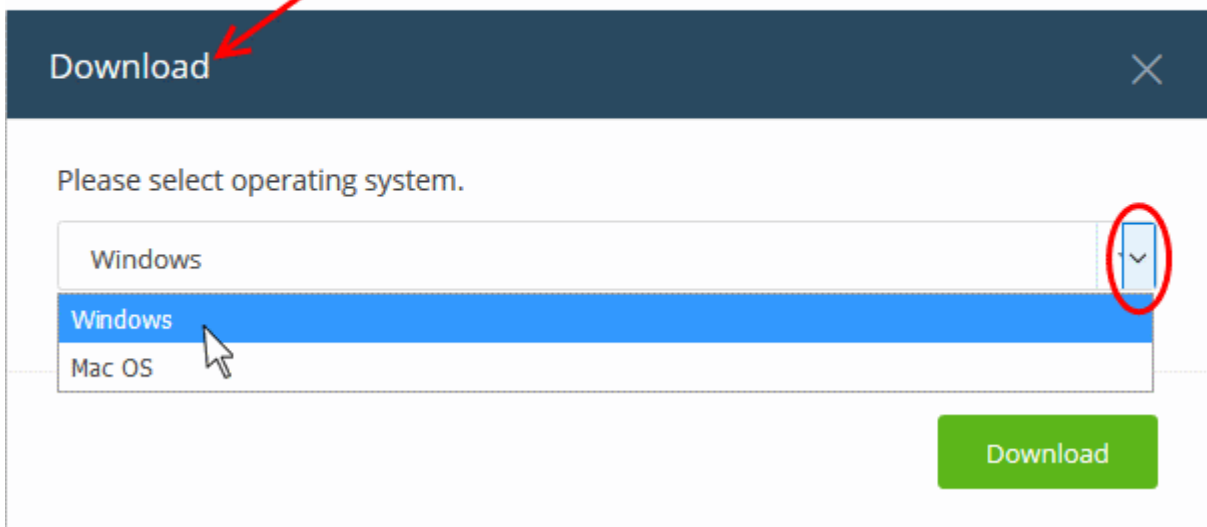
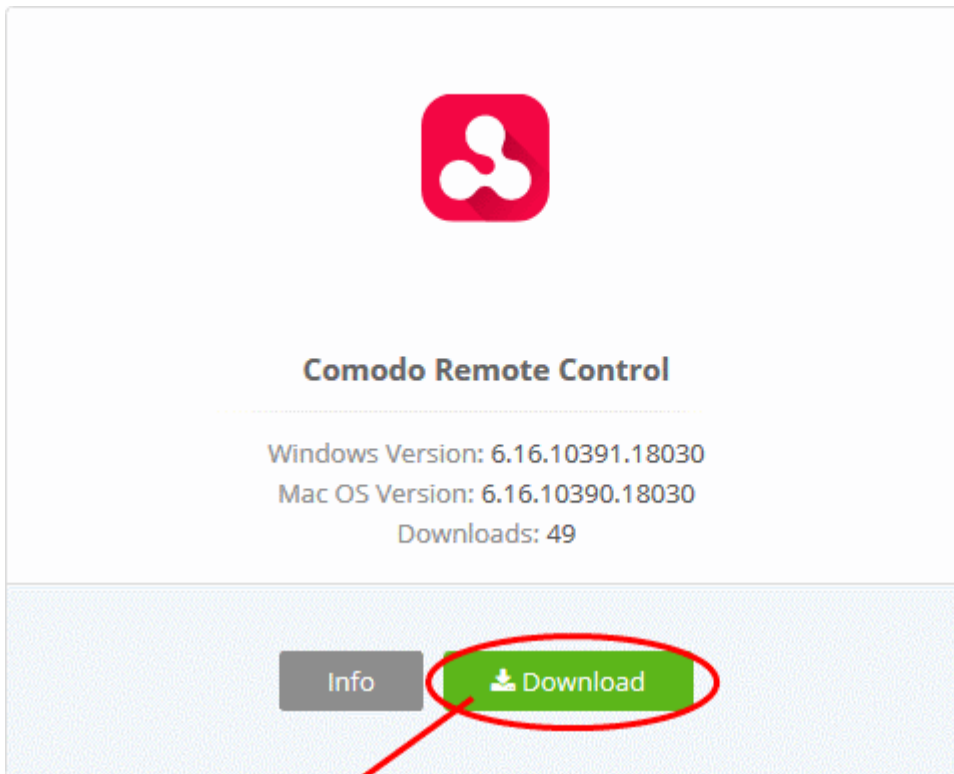
Step 2
Click this [link](#) to remote control a device.

Note
Please make sure that you have the latest version of the Comodo Remote Control installed. If you need to update Comodo Remote Control version, please download the new version from the link on Step 1.

- Click 'Download Comodo Remote Control' under 'Step 1'

Download CRC 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 'Comodo Remote Control' tile

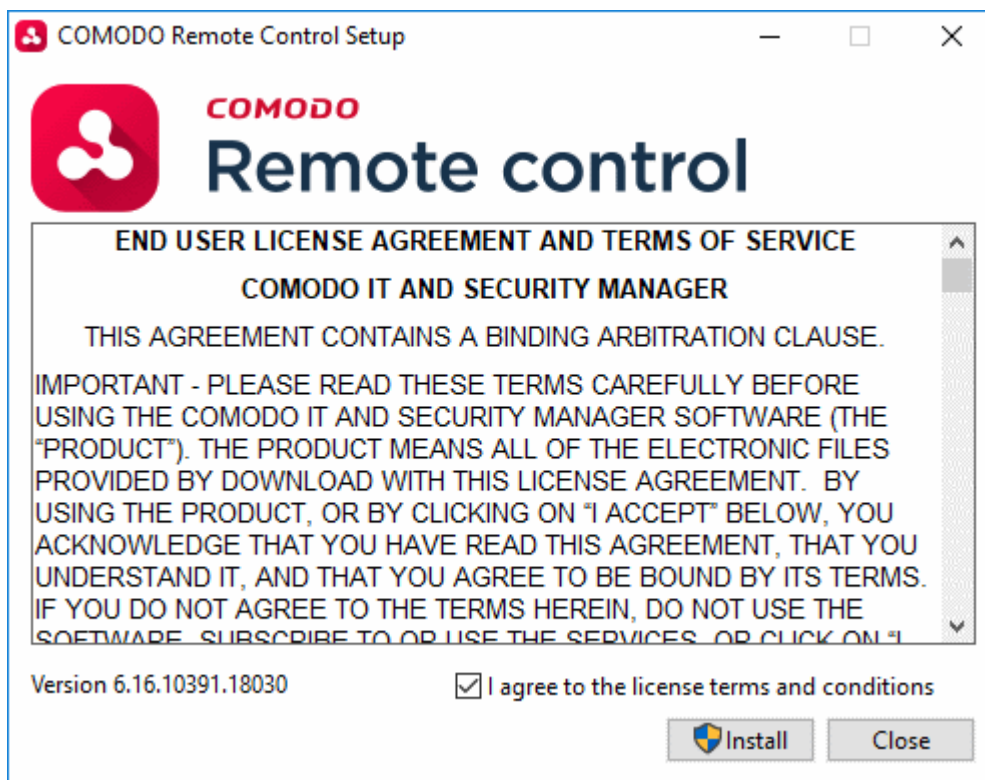


The 'Download' dialog will appear.

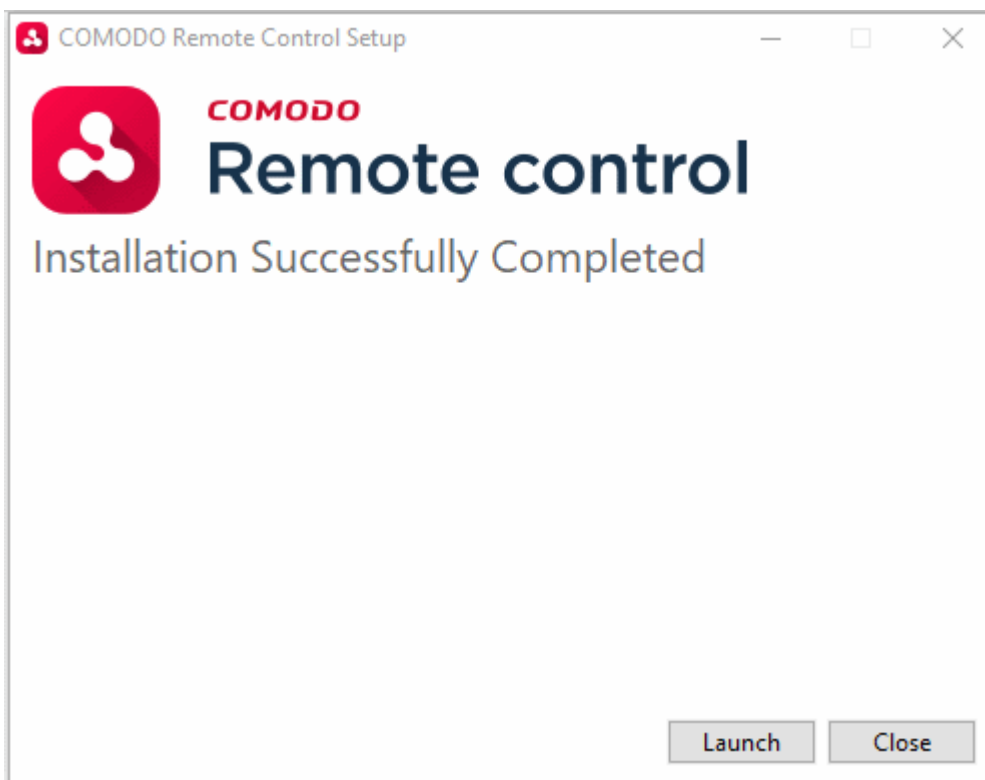
- Select the operating system of your admin machine, click 'Download' and save the setup file.

To install the tool

- 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

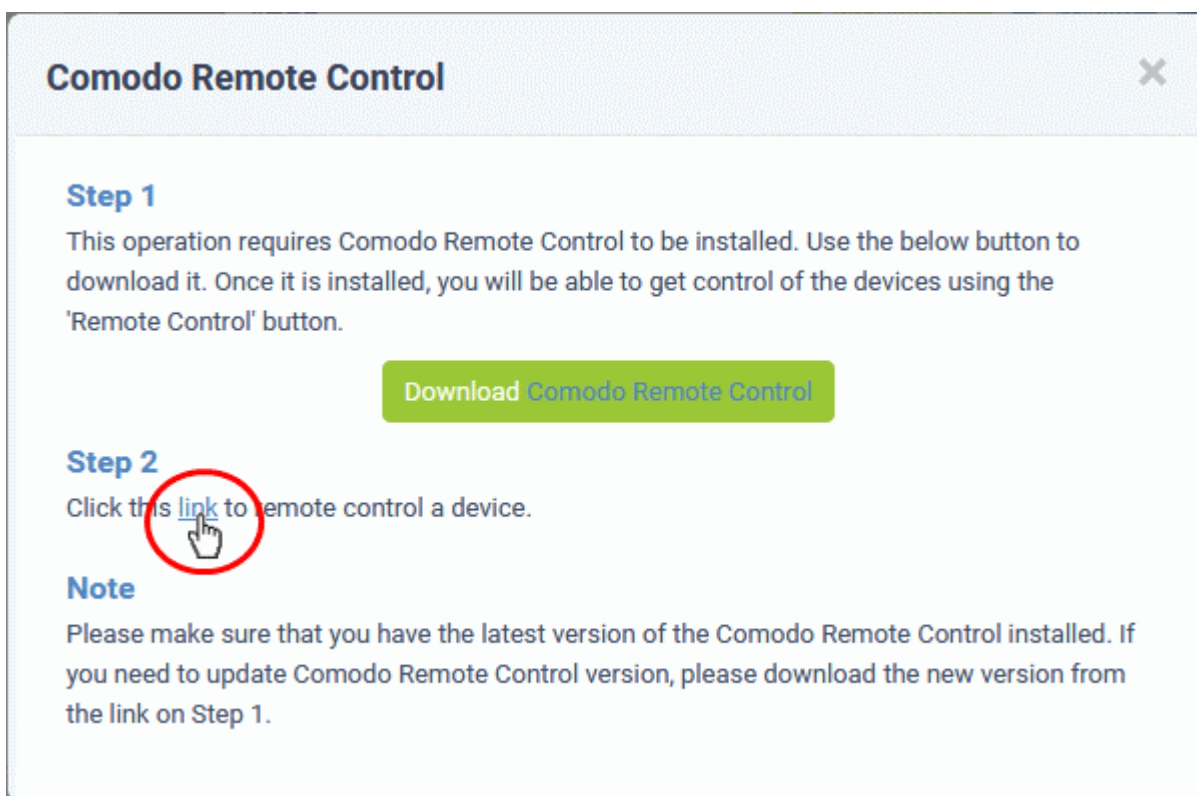
- Once CRC is installed, you can take remote control of a Windows endpoint from the Ticket Details interface.

To 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

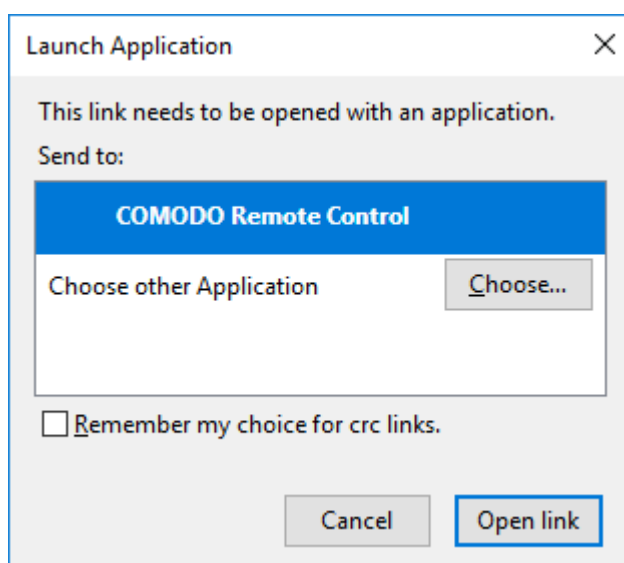
Reminder: The 'Remote Control' button will be available only for tickets generated by the ITSM module.

The 'Comodo Remote Control' dialog will appear:



- Click 'link' under step 2:

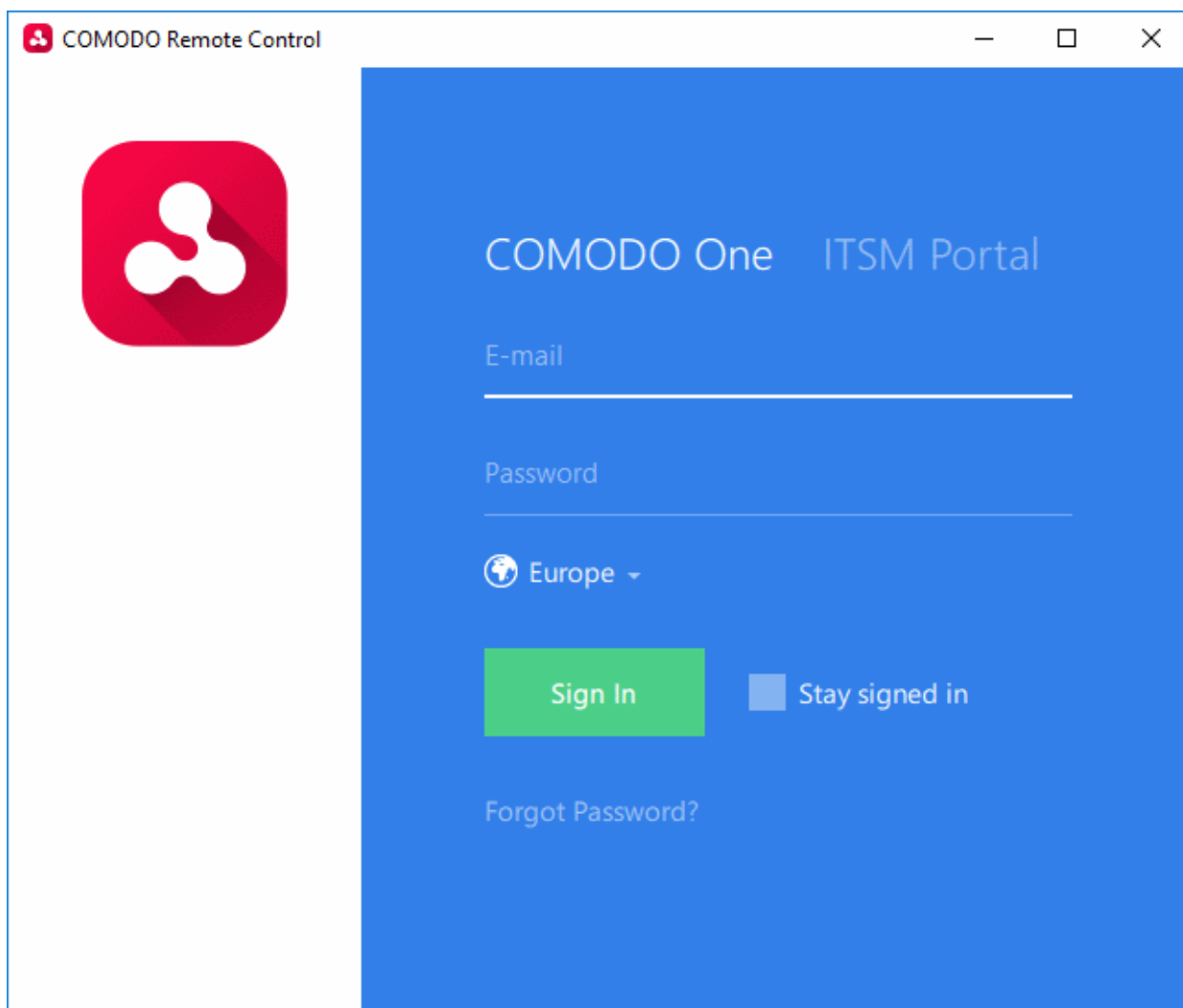
Next, you need to select the application to open the link.



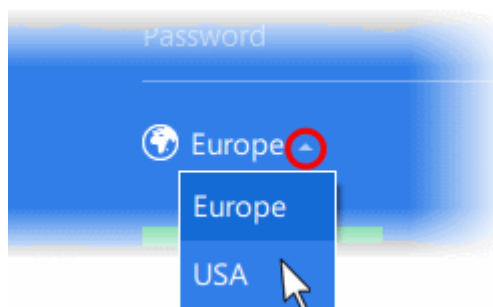
- Leave 'COMODO Remote Control' selected and click 'Open Link' in the 'Launch Application' dialog.

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

The CRC application will start:

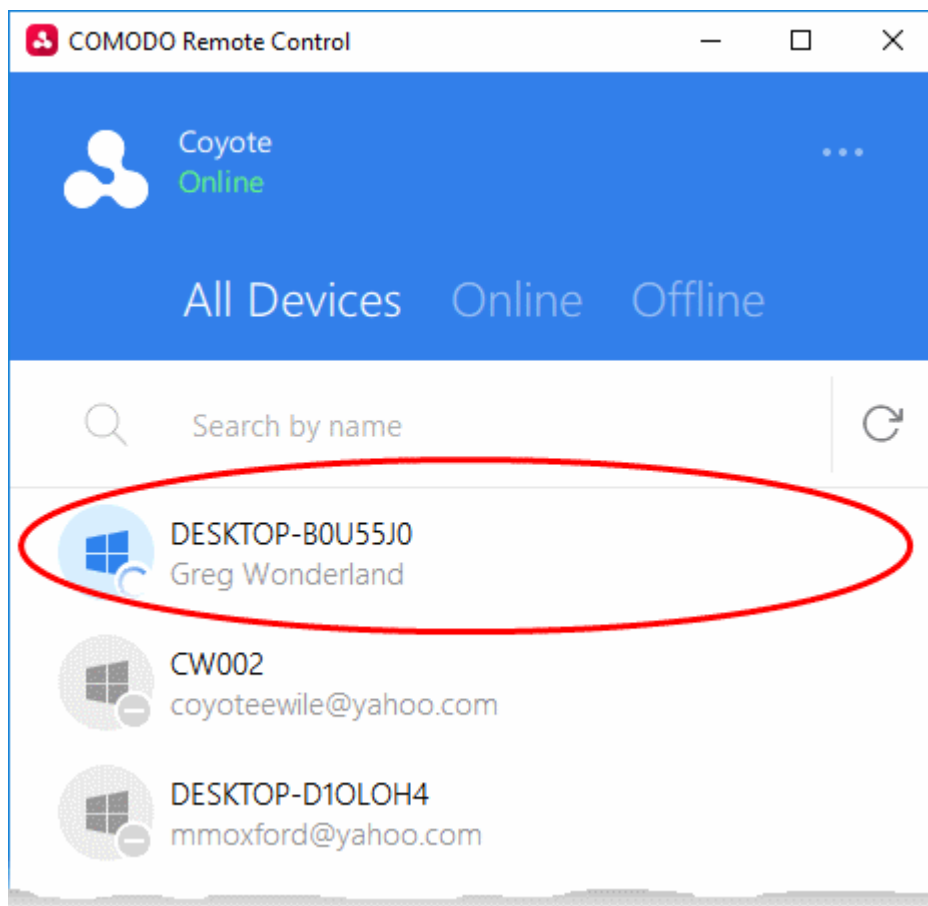


- Click the 'Comodo One' tab then login with your C1 username and password
- The region selector allows you to choose the C1 hosted service closest to your location. Select the location nearest to you for the best performance / fastest connection.





- Select 'Stay Signed in' if you want the CRC application to store your login credentials. The application will not ask for your password to login in future. You will instead directly connect to the endpoint after clicking the link in the **Comodo Remote Control** dialog.
- Click 'Sign In'.

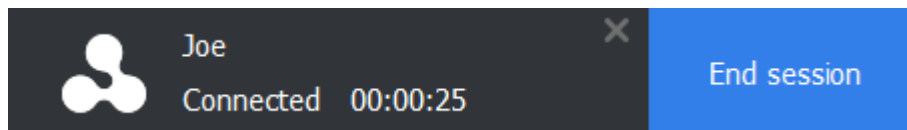
The viewer application will open with a list of enrolled Windows endpoints. The endpoint associated with the ticket is pre-selected for remote desktop connection:



Tip: Alternatively, you can launch the CRC application from your desktop:

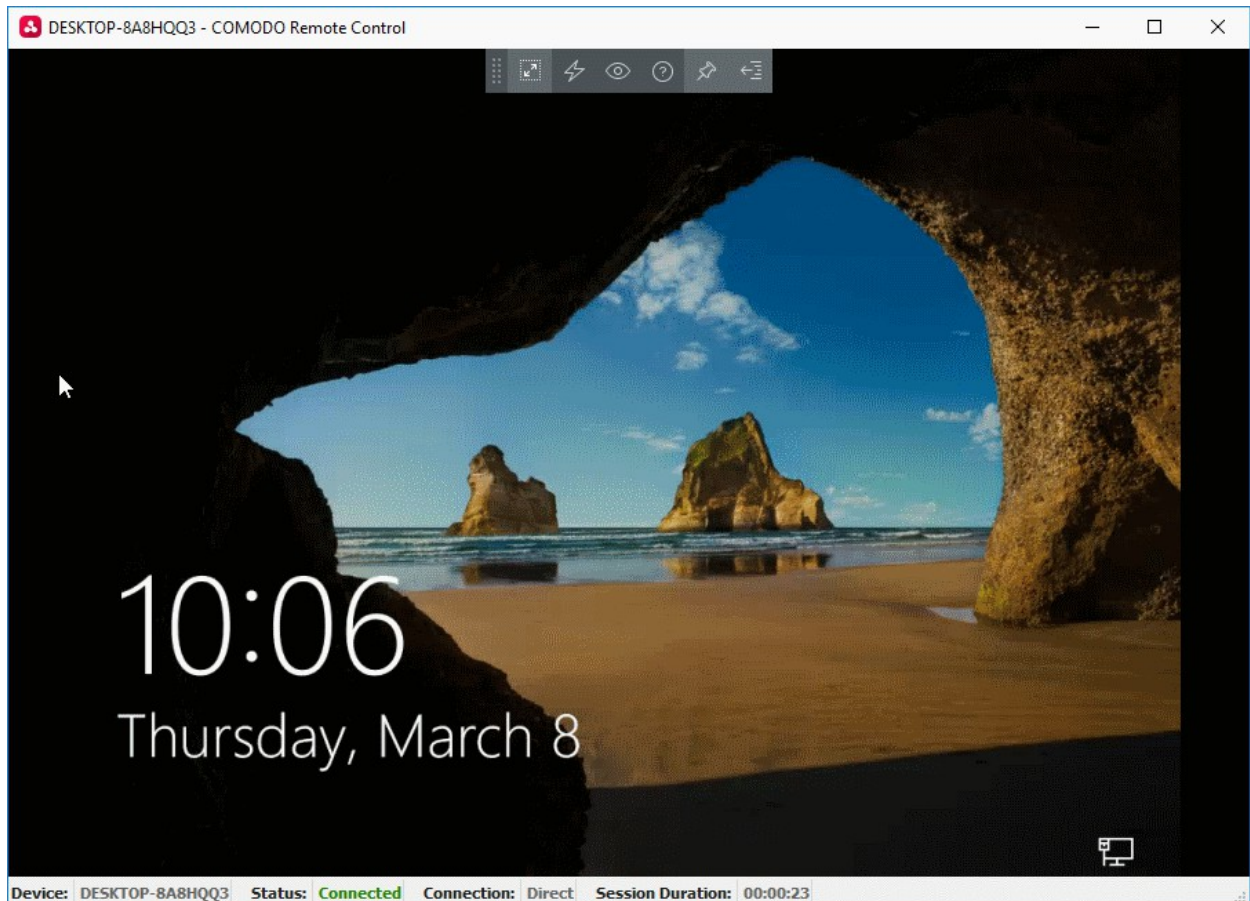
- Double click the desktop shortcut  or the system tray icon  to open the login screen.
- Login with your C1 username and password
- Select the device you want to manage, from the next screen.

Once connected, a notification will be shown on the managed endpoint stating that an admin has taken control:



- The end-user can choose to allow the session or terminate it by clicking the 'End session' link in the notification.

The 'Comodo Remote Control' interface will display the desktop of the remote computer:

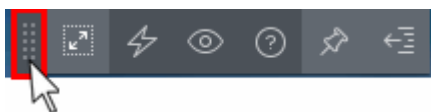


- You can now interact with the target device to perform tasks as required.
- The client interface contains the following menus and settings:



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.

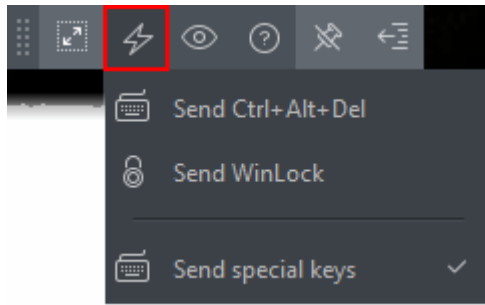


Pin - Pin or unpin the tool bar to the title bar in full screen view.



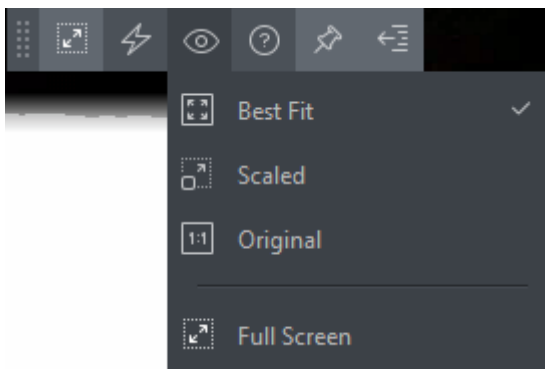
Minimize/Maximize - Show/hide tool bar options.





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

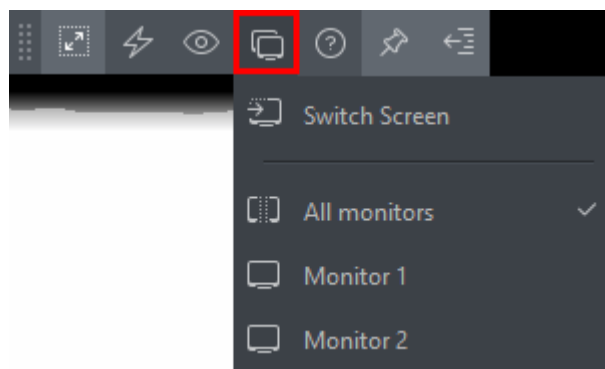
- **Send Ctrl + Alt + Del** - Opens the Windows security screen. This allows you to lock the computer, log the current user out of the remote machine, change passwords, view the local task manager or shut down/restart/hibernate the machine.
- **Send WinLock** - Locks the managed endpoint. A password 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 Comodo Remote Control' 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.

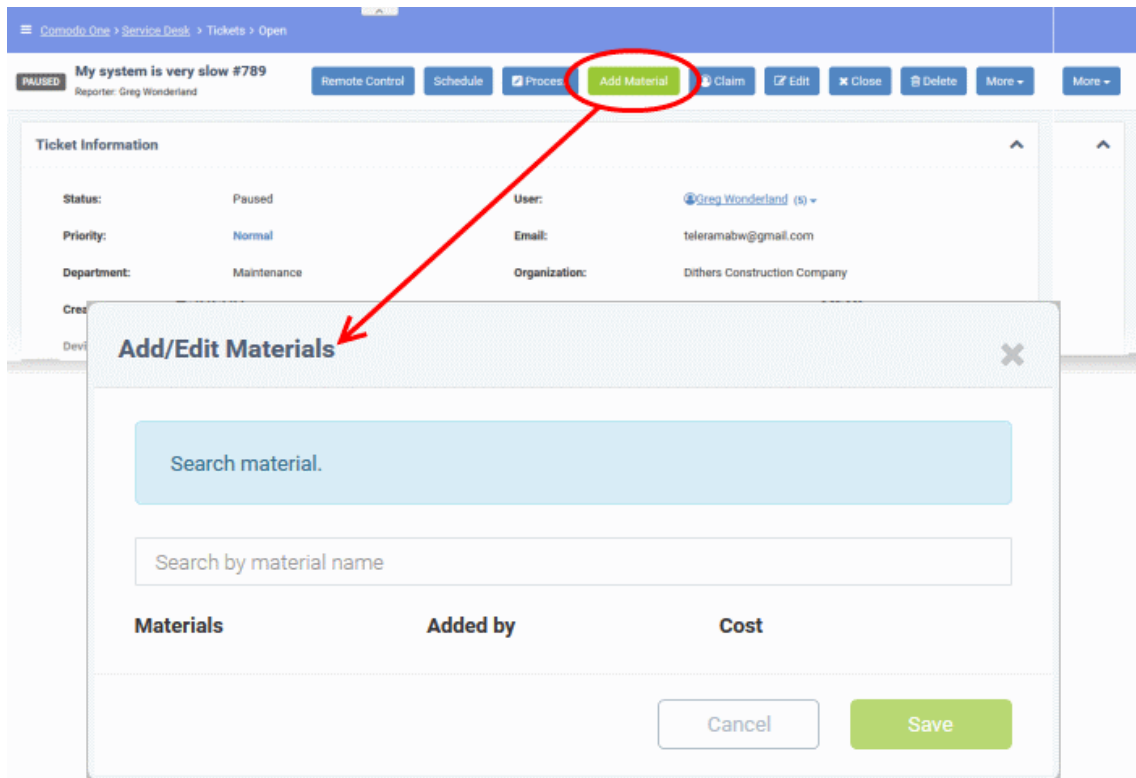
- Materials and expenses added to a ticket need to be approved by an administrator. Only then will they be charged to the customer.
- The 'Material Details' pane in the 'Ticket Details' interface shows all existing materials on the ticket.

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.

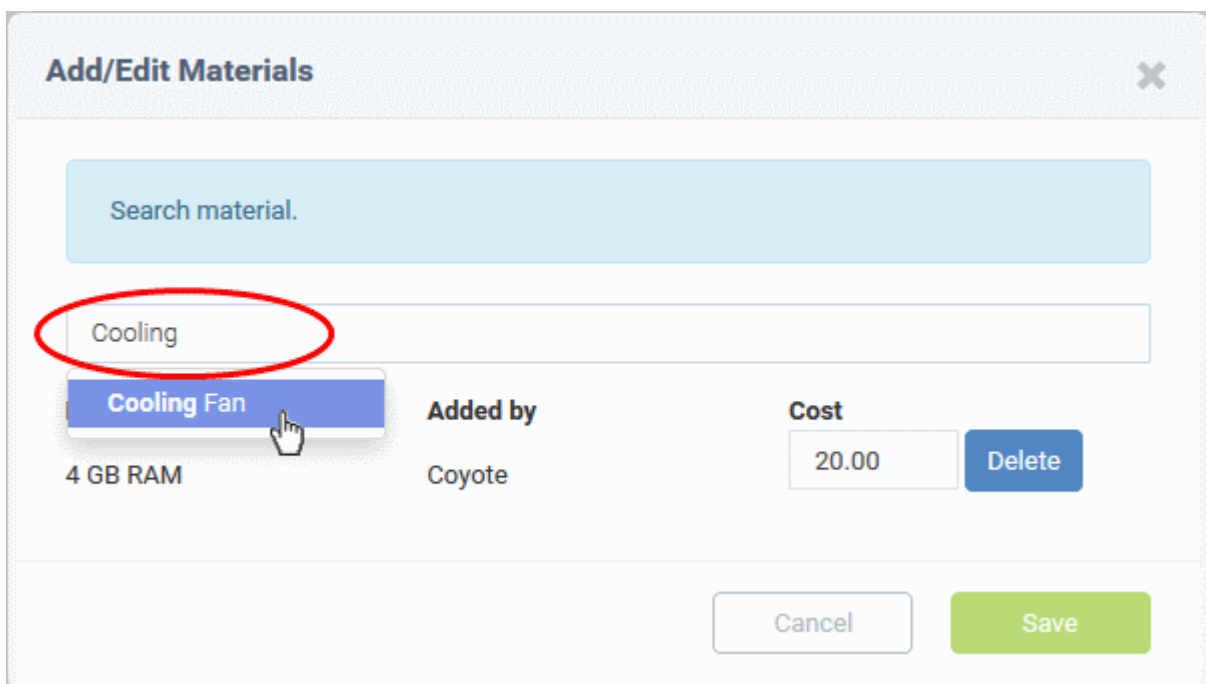
Add materials to a ticket

- 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:

Materials	Added by	Quantity	Cost	Total	
Printer cartridges	frontfork	<input type="text" value="8"/>	<input type="text" value="7.50"/>	<input type="text" value="60"/>	<input type="button" value="Delete"/>

'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:

Materials	Added by	Quantity	Cost	Total	
Remote virus removal	frontfork	<input type="text"/>	<input type="text" value="30"/>	<input type="text" value="30"/>	<input type="button" value="Delete"/>

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:

Material Details ^		
Material Name	Material Cost	Material Status
1.Meal	\$2.00	Awaiting
2.Cooling Fan	\$10.00	Awaiting
3.4 GB RAM	\$20.00	Approved
Total Approved Material Cost: \$20.00		

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:

Add/Edit Materials
✕

Search material.

Search by material name

Materials	Added by	Cost	
RJ 45 Network Cable 2 meters	Coyote	5.00	<button style="background-color: #3f51b5; color: white; padding: 2px 5px;">Delete</button>
Meal	Coyote	2.00	<button style="background-color: #3f51b5; color: white; padding: 2px 5px;">Delete</button>
Cooling Fan	Coyote	10.00	<button style="background-color: #3f51b5; color: white; padding: 2px 5px;">Delete</button>
4 GB RAM	Coyote	20.00	<button style="background-color: #3f51b5; color: white; padding: 2px 5px;">Delete</button>

Cancel

Save

- 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

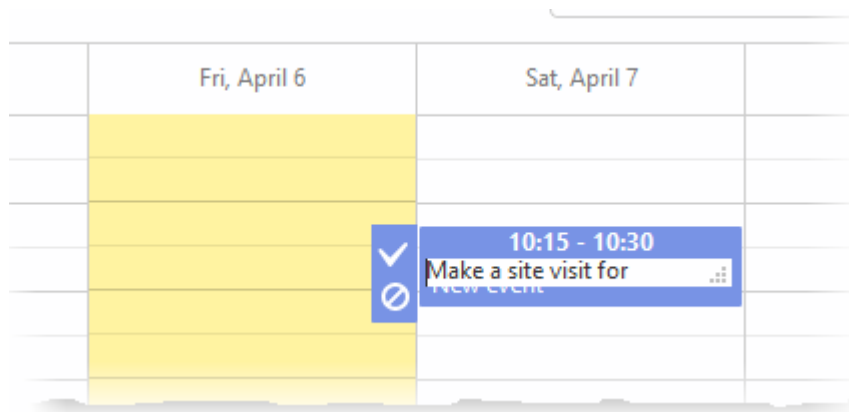
- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open

- Click the 'Schedule' button

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

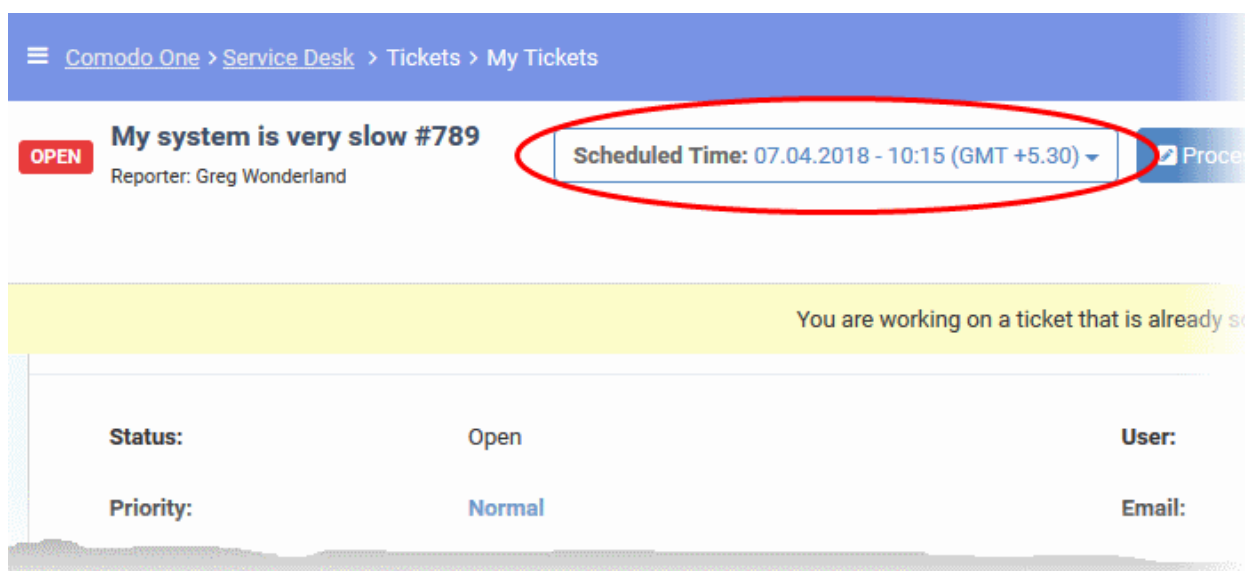
The screenshot shows the Comodo One Service Desk interface. At the top, there is a navigation bar with 'Comodo One > Service Desk > Tickets > My Tickets'. Below this, a ticket card for 'My system is very slow #789' is displayed. The ticket status is 'OPEN' and the reporter is 'Greg Wonderland'. A row of action buttons includes 'Remote Control', 'Schedule', 'Process', 'Add Material', 'Edit', 'Close', 'Delete', and 'More'. The 'Schedule' button is circled in red, with a red arrow pointing to a calendar window below. The calendar window is titled 'Ticket #789: My system is very slow' and shows a weekly view for the period '2 Apr 2018 - 8 Apr 2018'. The calendar grid has columns for days from Monday to Sunday and rows for hours from 9:00 to 19:00. The Friday column (April 6) is highlighted in yellow.

- 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

- 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

The screenshot shows the 'Appointment Edit' dialog box in the Comodo One Service Desk. The dialog is open over a ticket titled 'My system is very slow #789'. The dialog contains the following fields and options:

- Description:** Make a site visit for Dagwood
- Tickets:** 732 john@yopmail.com *
- Shared:**
- Full day:** 10:15 7 April 2018 - 10:30 7 April 2018

Buttons at the bottom include 'Cancel', 'Delete', and 'Save'. A red arrow points from the 'Reschedule' button in the ticket's scheduled time dropdown to the 'Appointment Edit' dialog title.

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

Ticket #732: My system is very slow

Day Week < 2 Apr 2018 – 8 Apr 2018 > My Calendar

	Mon, April 2	Tue, April 3	Wed, April 4	Thu, April 5	Fri, April 6	Sat, April 7	Sun, April 8
9 ⁰⁰							
10 ⁰⁰							10:15 - 10:30 Make a site visit for Dagwood
11 ⁰⁰							
12 ⁰⁰							
13 ⁰⁰							
14 ⁰⁰							
15 ⁰⁰							
16 ⁰⁰							
17 ⁰⁰							
18 ⁰⁰							
19 ⁰⁰							

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

Comodo One > Service Desk > Tickets > My Tickets

OPEN My system is very slow #789
Reporter: Greg Wonderland

Scheduled Time: 07.04.2018 - 10:15 (GMT +5.30)

Reschedule
Delete Schedule

You are working on a ticket that is already scheduled

Status: Open User:

The page at <https://servicedesk.comodo.com> says:

Selected schedule for ticket will be removed from system.

- 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 screenshot shows the Comodo One Service Desk interface. At the top, the breadcrumb navigation is 'Comodo One > Service Desk > Tickets > New Ticket'. The main header displays the ticket title 'My system is very slow #732' with a status of 'OPEN' and the reporter 'john'. Action buttons include 'Schedule', 'Process', 'Add Material', 'Edit', 'Delete', and 'More'. A dropdown menu is open from the 'More' button, listing various actions: 'Change Ticket', 'Owner', 'Release (unassign)', 'Ticket', 'Mark as Overdue', 'Mark as Unanswered', 'Manage Forms', 'Ban Email', 'Create KB Entry' (highlighted with a red circle), and 'Print'. A red arrow points from the 'Create KB Entry' option to the 'FAQ' section below. The FAQ section contains an 'Answer' field, a 'Question' field with the text 'My system is very slow', a 'Category Listing' dropdown menu with the text 'FAQ category the question belongs to.', and a 'Listing Type' section with radio buttons for 'Public (publish)' and 'Internal (private)'. Below this is a rich text editor for the answer, which contains the text 'Question: My system is very slow' and 'Answer: Hi john,'.

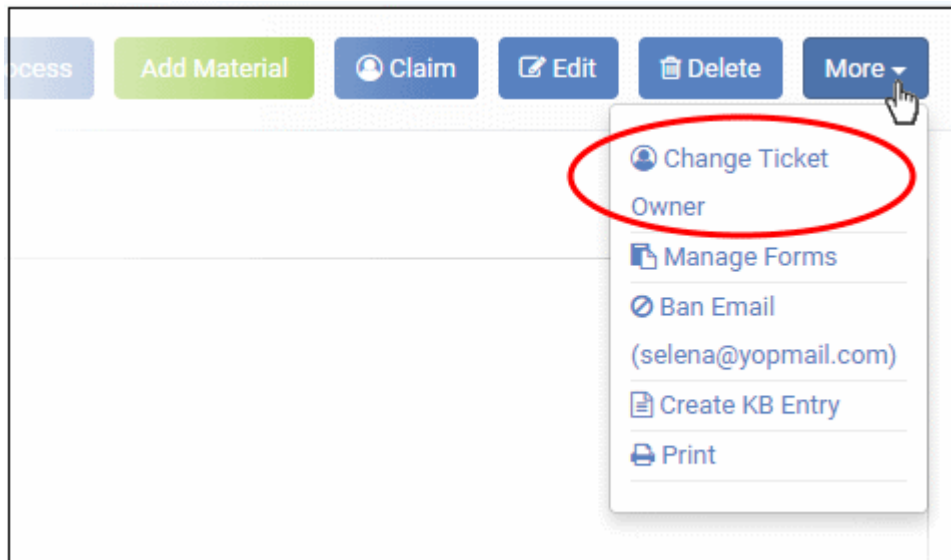
The **FAQ** screen will appear. This screen allows staff to select the category under which the FAQ will be placed. You can also specify articles which are related to the FAQ, and choose to make the FAQ 'Public' or 'Internal'. See **FAQs** for more details.

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:

Change user for ticket #789 ✕

? Search existing users or add a new user.

 **Greg Wonderland** Add New User
teleramabw@gmail.com
Dithers Construction Company

Contact Information

Phone Number:

Internal Notes: Network connection

Cancel Continue

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.

Change user for ticket #2 [X]

Search existing users or add a new user.

Search by email, phone or name

Hertriumph
hertriumph@gmail.com

Add New User

Change user for ticket #2 [X]

Search existing users or add a new user.

Search by email, phone or name

Email Address: *

Full Name: *

Phone Number: Ext:

Internal Notes:

Register with Default Settings
Default timezone: GMT 5:30 - Asia/Calcutta

Cancel Reset **Add User**

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

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

- You can associate new users with an organization from the user directory interface ('Staff Panel' > 'Users' > 'User Directory' > Click on their username > Click the link next to 'Organization').
- See '**Add a user to an organization**' in **Managing 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

The screenshot shows the 'My Tickets' page for a ticket titled 'Display not clear #787'. The ticket is currently 'PAUSED'. The reporter is 'Greg Wonderland'. The ticket details include: Department: Maintenance, Organization: Dithers Construction Company, Create Date: Wed, Apr 4 2018 2:45 pm, Phone: -, Device Name: -, Source: Web (182.74.23.22). The 'Claim' button is highlighted with a red circle. A red arrow points from the 'Claim' button to a confirmation dialog box that says 'Please Confirm' and 'Are you sure want to claim (self assign) this ticket?' with 'Yes' and 'Cancel' buttons.

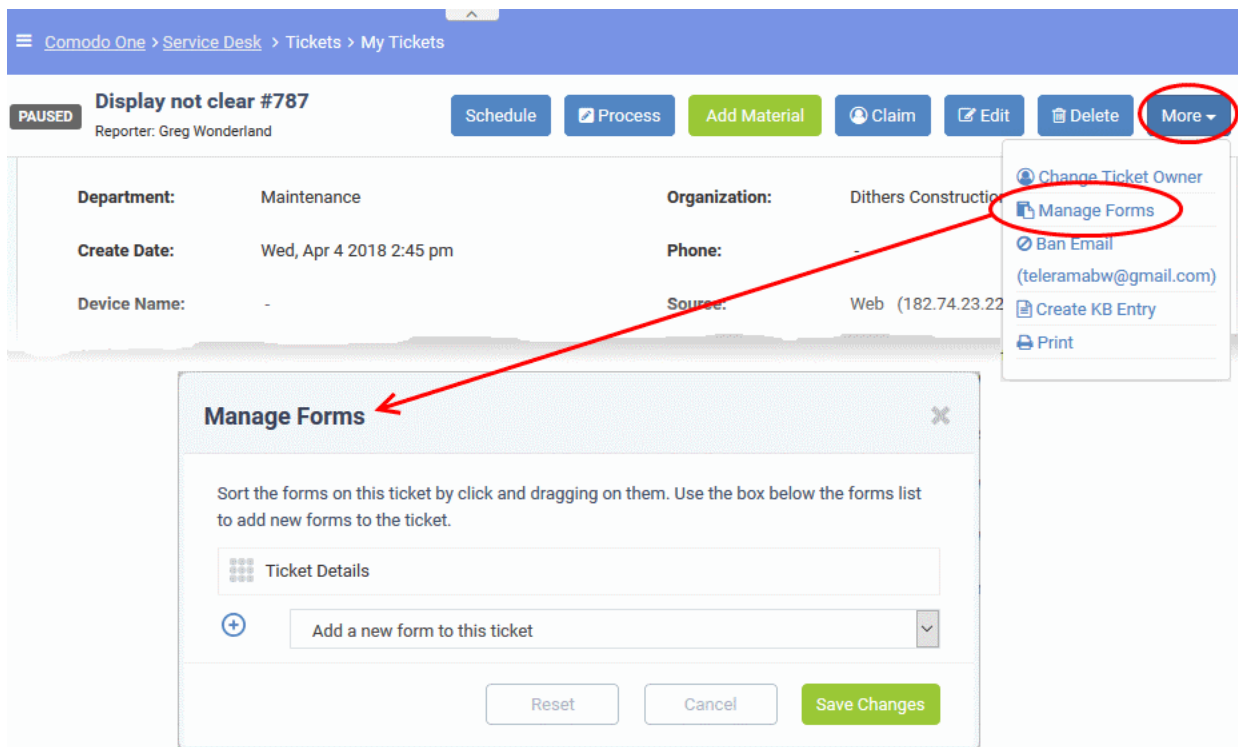
- Click 'Yes' in the confirmation screen to claim the ticket.

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.

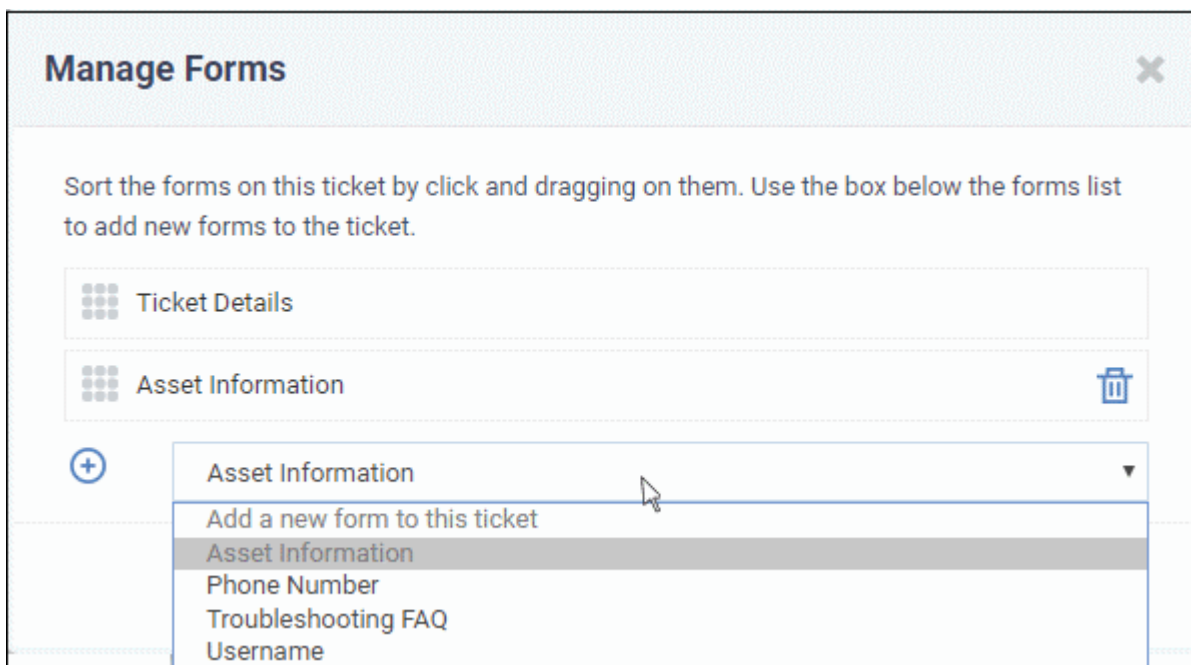
To manage the forms for a ticket

- 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.

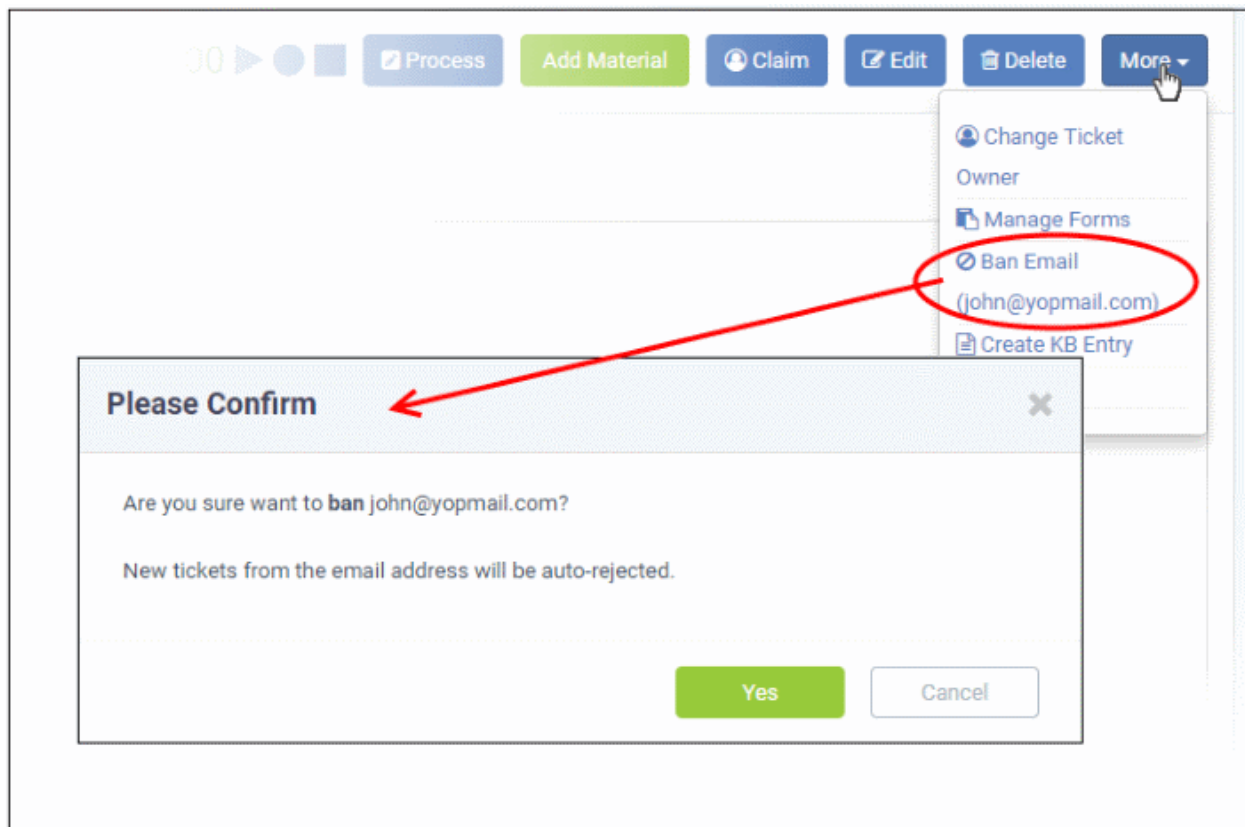
- To remove a form from a ticket, click the 'Manage Form' button then click the trash can icon beside the form.
- Click the 'Save Changes' button at the bottom.

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.

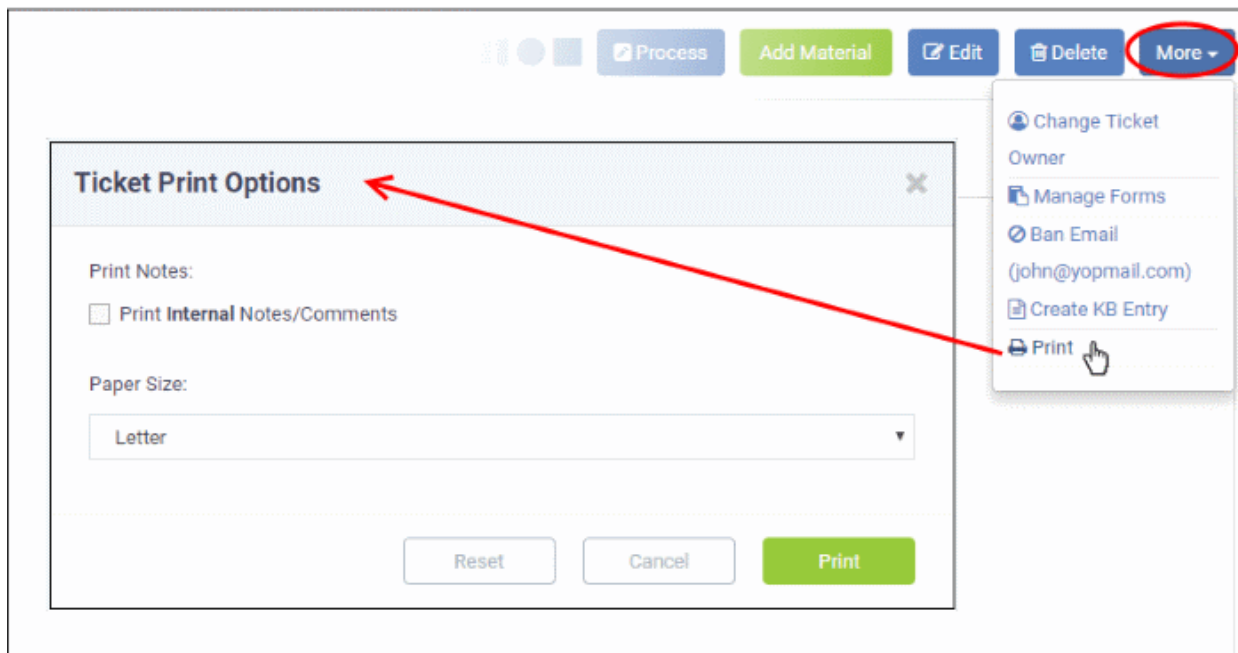
Print a Ticket

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	✓		
2017-05-03 12:22:21	2017-05-03 12:31:52	00:09:31	Coyote	✓		

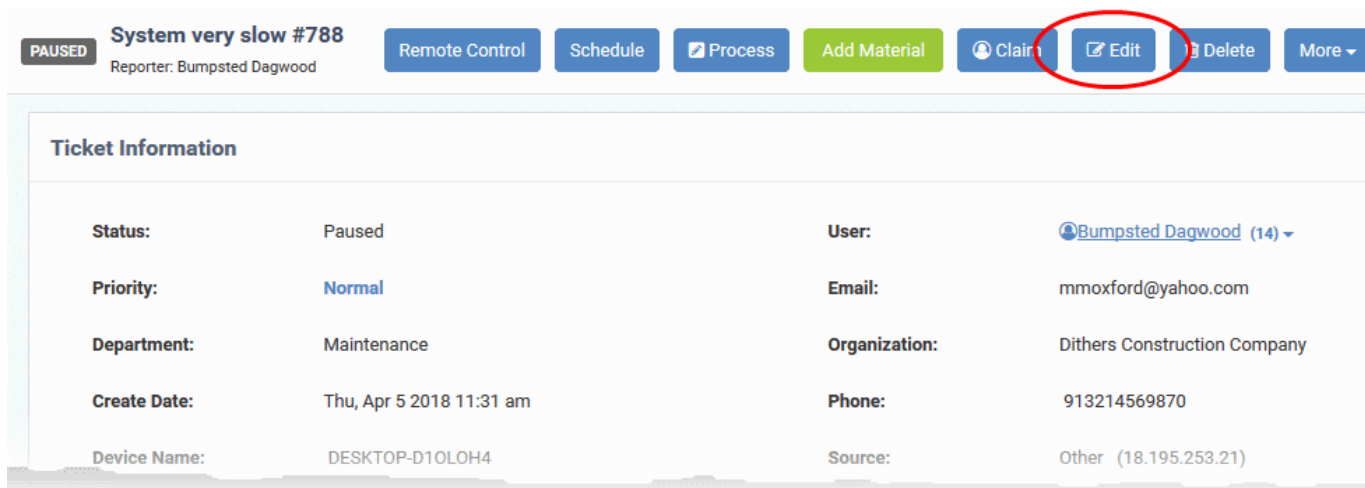
- Save the file for your future reference and/or print the ticket from the pdf file.

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 screenshot shows a ticket interface for a paused ticket titled "System very slow #788" reported by "Bumpsted Dagwood". The top navigation bar includes buttons for "Remote Control", "Schedule", "Process", "Add Material", "Claim", "Edit", "Delete", and "More". The "Edit" button is circled in red. Below the navigation bar is a "Ticket Information" section with the following details:

Status:	Paused	User:	Bumpsted Dagwood (14) ▾
Priority:	Normal	Email:	mmoxford@yahoo.com
Department:	Maintenance	Organization:	Dithers Construction Company
Create Date:	Thu, Apr 5 2018 11:31 am	Phone:	913214569870
Device Name:	DESKTOP-D10LOH4	Source:	Other (18.195.253.21)

The 'Update Ticket' screen will appear:

Update Ticket #788

User Information: Currently selected user

User: **Bumpsted Dagwood** Change
<mmoxford@yahoo.com>

Ticket Information: Due date overrides SLA's grace period.

Ticket Source: *

Category:

Department:

SLA Plan:

Time Spent: 0 hrs 30 min

Due Date: *Time is based on your time zone (GMT+5.30)*

Ticket Details: Please Describe Your Issue

Issue Summary: *

Priority Level: *

Asset Type:

Ticket Type:

Ticket Type Sub Category:

Internal Note: Reason for editing the ticket (required)

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.

Change user for ticket #788 ✕

i Search existing users or add a new user.



Bumpsted Dagwood
mmoxford@yahoo.com
Dithers Construction Company

Contact Information

Phone Number: 913214569870

Internal Notes:

Tip: New users will be added as guest users.

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

Ticket Information

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

Ticket Information: Due date overrides SLA's grace period.

Ticket Source: *

Category:

Department:

SLA Plan:

Time Spent: 0 hrs 30 min

Due Date: *Time is based on your time zone (GMT+5.30)*

Ticket Summary: Please Describe Your Issue

- **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

The screenshot displays the 'Ticket Details' page for ticket #788. At the top, there is a navigation bar with buttons for 'Remote Control', 'Schedule', 'Process', 'Add Material', 'Edit', 'Close', 'Delete', and 'More'. The 'Close' button is circled in red. Below this, the 'Ticket Information' section shows the following details:

Status:	Open	User:	Bumpsted Dagwood (14) ▾
Priority:	Normal	Email:	mmoxford@yahoo.com
Department:	Maintenance	Organization:	Dithers Construction Company

A dialog box titled 'Close Ticket #788' is open in the foreground. It contains the text: 'Are you sure you want to CLOSE this ticket? Reasons for status change (internal note). Optional but highly recommended.' Below this text is a text input field. At the bottom of the dialog box are three buttons: 'Reset', 'Cancel', and 'Close'.

- 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:

The screenshot shows the 'Reopen Ticket' interface. At the top, there is a navigation bar with buttons: 'Add Material' (green), 'Edit' (blue), 'Reopen' (blue, circled in red), 'Delete' (blue), and 'More' (blue). Below the navigation bar, the user information is displayed: 'User: Greg Wonderland (3)', 'Email: teloramabw@gmail.com', and 'Organization: Dithers Construction Company'. A modal dialog box titled 'Reopen Ticket #767' is open, containing the question 'Are you sure you want to REOPEN this ticket?' and a text input field for 'Reasons for status change (internal note). Optional but highly recommended.' The dialog has 'Reset', 'Cancel', and 'Reopen' buttons at the bottom. A red arrow points from the 'Reopen' button in the navigation bar to the 'Reopen' button in the dialog box.

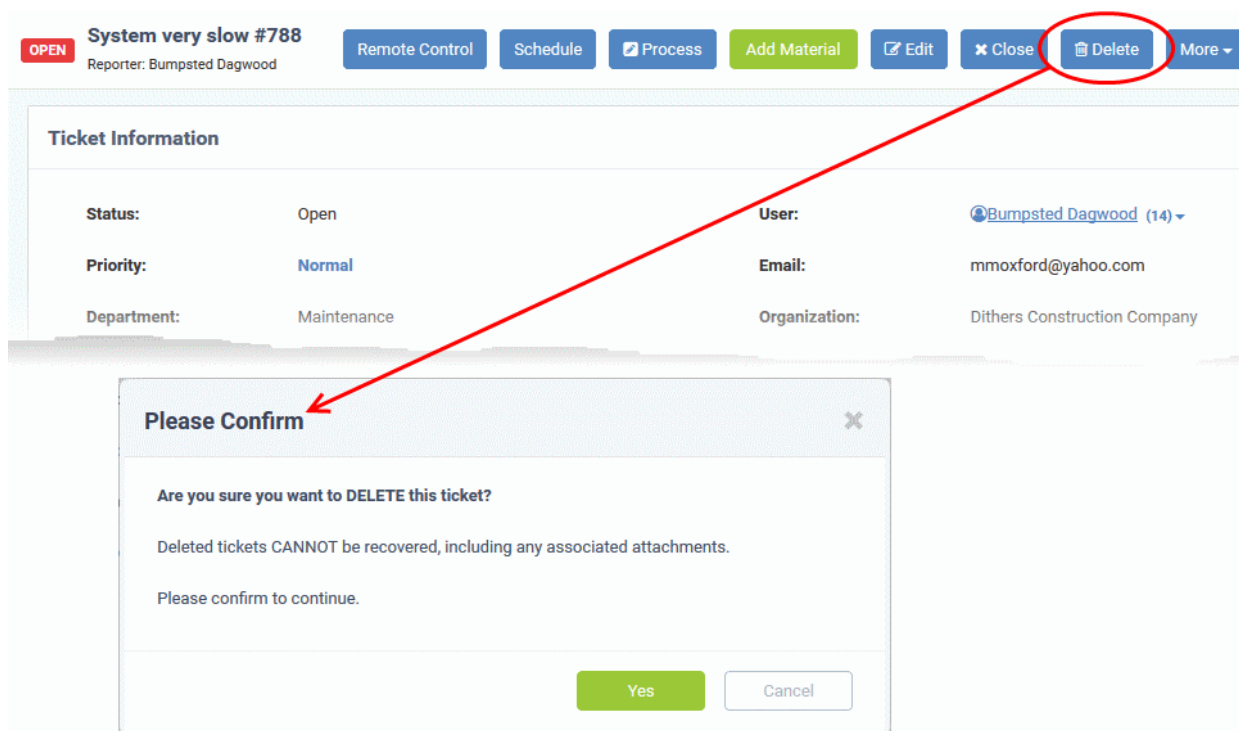
- Enter a reason for reopening then click the 'Reopen' button.

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

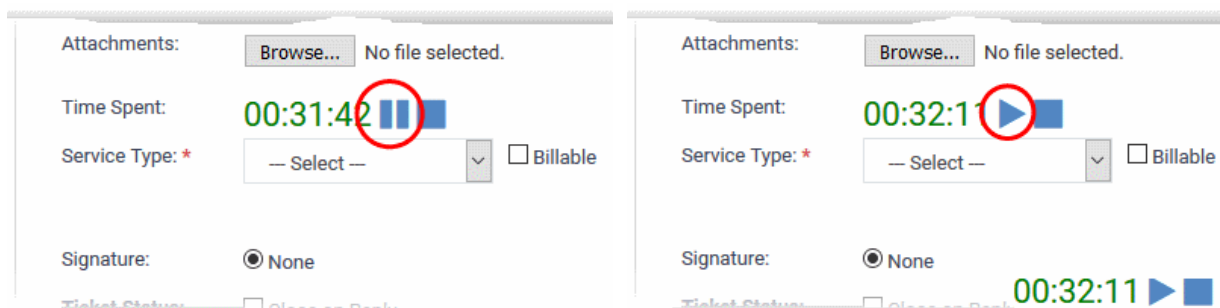
Tickets can be paused and resumed by staff. Paused tickets can only be resumed by the same staff member or by an administrator.

To pause/resume 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 '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.

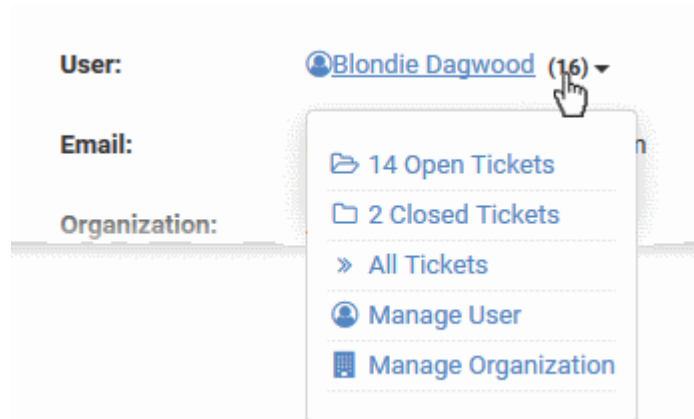
Ticket Information

- 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:

Ticket Information			
Priority:	Normal	User:	Avantistude (433) ▾
Department:	Maintenance	Email:	avantistude@gmail.com
Create Date:	Wed, Sep 19 2018 3:11pm	Organization:	-
Device Name:	DESKTOP-D80SVJJ	Phone:	-
Closed By:	Automated Agent	Source:	Other
Close Date:	Wed, Sep 19 2018 3:11pm	Last Message:	Wed, Sep 19 2018 3:11pm
Last Response:	Fri, Sep 21 2018 10:19am	Asset Type:	Workstation
First Reply:	0m	Category:	-
Last Update:	21.09.2018 10:31 am	Resolution:	Close ticket. Submit files to Comodo support after scan results Read Less

- **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 created.
- **User:** The name of the user that created the ticket, or on whose behalf the ticket was created by an agent. 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 organization to which he/she belongs. See **'Manage Users'** and

'[Manage Organizations](#)' 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 which were automatically submitted by an endpoint-agent will have the address 'Ticket User'.
- **Organization:** The organization to which the user belongs.
- **Create Date:** The date and time at which the ticket was added to Service Desk
- **Phone:** The contact number of the user.
- **Device Name** - The label assigned to the device by the user
- **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 message was received from the user.
- **Last Response:** The date and time of the most recent response from a staff member.
- **First Reply** - Date and time at which the first response was send 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'.

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.

Ticket Workflow ^		
Name	Status	Action
Stage 1: Generate Quote	In Progress	<button>✓ Complete</button>
Stage 2: Generate Purchase Order	In Progress	<button>✓ Complete</button> <button>↶ Revert stage</button>
Stage 3: Delivery of the Asset	Not Started	
Stage 4: Installation on premisis	Not Started	
Stage 5: Demo	Not Started	

- 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'.

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**

Ticket Actions ^

Info! Reply posted successfully x

Post ReplyPost Internal NoteDept. TransferAssign Ticket

TO: v

CC: [Add CC](#)

Collaborators: [Add Recipients](#)

Response: * v

<> **Aa** **B** **I** **U** **A**

Start writing your response here. Use canned responses from the drop-down above

Attachments:

Signature: None

Ticket Status: Reopen on Reply

Resolution: Set Reply as Resolution

- **Change the department**
- **Reassign the ticket**
- **Initiate Quote generation for billable items**

To post a reply for the ticket

- Click the 'Post Reply' tab

- **From:** The email address used to send the reply to the user. The 'Organizations' interface allows you to set default 'From' addresses for each organization. See **Manage Organization Details** in **Manage Organizations** 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 organization's 'Settings' tab:

- Click 'Users' on the left then 'Organizations'
- Click the name of the organization to open its details interface
- Click the 'Name' of the organization in the upper panel
- Click the 'Settings' tab and scroll to the 'Automated Collaboration' section

See **Manage Organization Details** in **Manage Organizations** for more details.

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

The screenshot shows the 'Collaborators' section of the Service Desk interface. A red circle highlights the 'Collaborators:' label and the 'Recipients (6 of 6)' link, which has a checked checkbox. A red arrow points from this link to a modal window titled 'Ticket Collaborators'. The modal window displays a list of six collaborators, each with a checked checkbox on the left and a trashcan icon on the right. The collaborators are: Bumpsted Dagwood (mmoxford@yahoo.com), Default User (agent.monitor@DithersConstructionCompany), Default User (noreply@onecomodo.com), Default User (noreply@one.comodo.com), Ticket User (dyanorat481@gmail.com), and Rich Cyclist (humbersafety@gmail.com). At the bottom of the modal, there is an 'Add New Collaborator' button and three buttons: 'Cancel', 'Reset', and 'Save Changes'.

- 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:

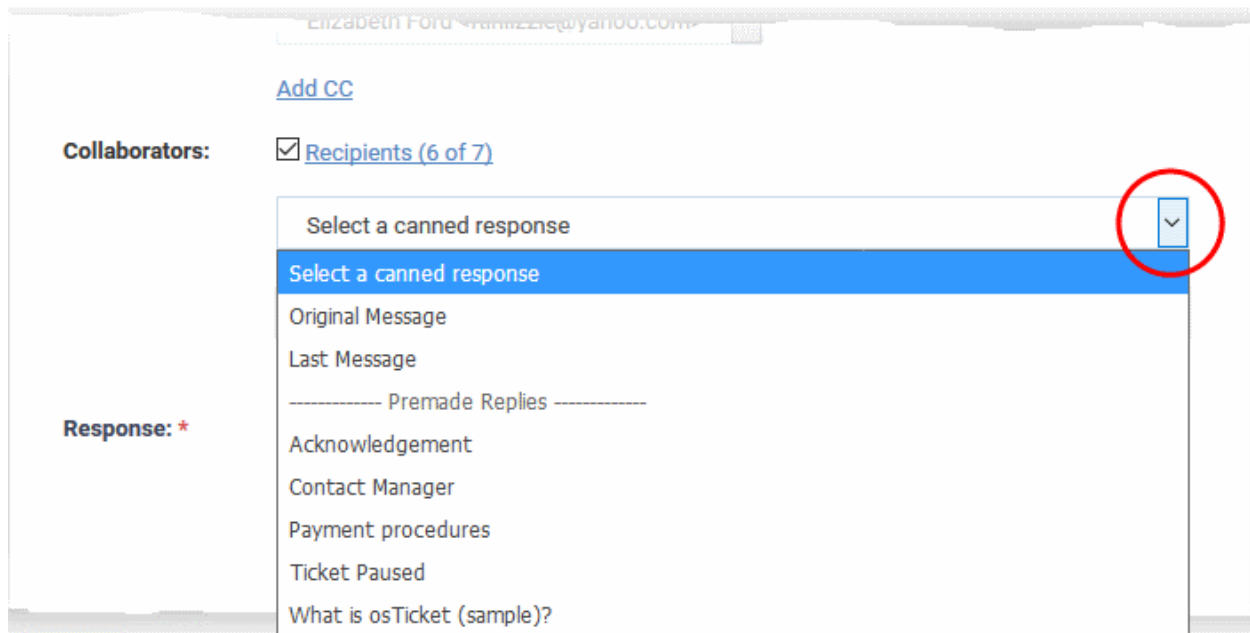
- Enter the name or email ID of a user in the search field. Select the user from the suggestions that appear and click 'Continue'.
- Create a new user by filling the form and click the 'Add User' button.

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:

- Click 'Users' > 'User Directory'
- Click a user name in the list to open their details page
- In the upper-pane, click the 'Add Organization' link next to the 'Organization' label.

See '[Add a user to an organization](#)' in [Manage Users](#) for 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'). Refer to '**Canned Response**' 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 this option if you want your reply to double as the ticket resolution. A resolution is an indication of the ticket's current status in your work-flow. Examples include 'Resolved', 'Unresolved', 'Won't fix', 'Escalated' etc.

To post an internal note

- Click the 'Post Internal Note' tab

The screenshot shows the 'Post Internal Note' form with the following fields and controls:

- Post Reply** (button)
- Post Internal Note** (tab, highlighted with a red circle)
- Dept. Transfer** (button)
- Reassign Ticket** (button)
- Create Quote** (button)
- Note Title:** Text input field with placeholder text: *Summary of the note (optional)*
- Internal Note: *** Rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, link, unlink, list, list, link, unlink, image, video, table, link, unlink, and trash.
- Attachments:** **Browse...** button and text: *No file selected.*
- Time Spent:** **00:31:15** with a progress bar.
- Service Type: *** Dropdown menu with *-- Select --* and a **Billable** checkbox.
- Ticket Status:** Dropdown menu with *-- unchanged --*.
- Post Note** (button)
- Reset** (button)

- **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.

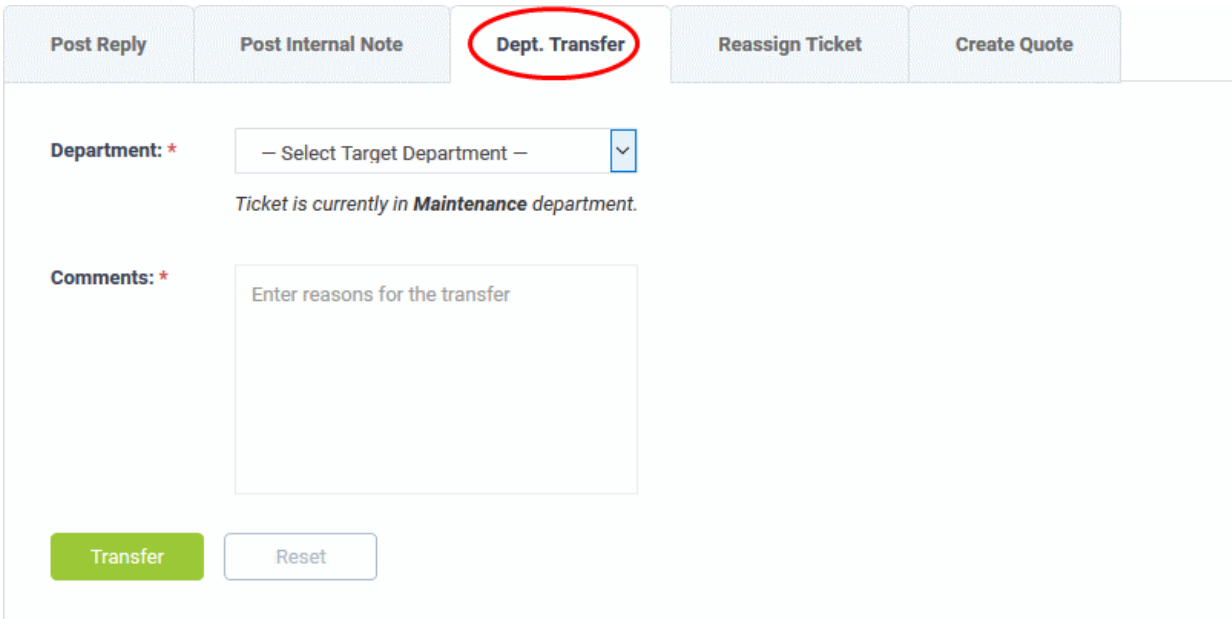
- **Ticket Status:** To change the status of the ticket, select from the options. The options change depending on the current status of the ticket. For example, for an open ticket, the options are 'Unchanged', 'Close the ticket' and 'Mark As Unanswered'.
- **Resolution:** The resolution field of a ticket 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.



The screenshot shows the 'Dept. Transfer' tab selected in the 'Ticket Actions' pane. The 'Department: *' dropdown menu is set to '- Select Target Department -'. Below the dropdown, it indicates 'Ticket is currently in Maintenance department.' The 'Comments: *' text area contains the placeholder text 'Enter reasons for the transfer'. At the bottom, there are two buttons: 'Transfer' (green) and 'Reset' (grey).

- **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.

The screenshot shows the 'Reassign Ticket' form. At the top, there are five tabs: 'Post Reply', 'Post Internal Note', 'Dept. Transfer', 'Reassign Ticket' (highlighted with a red circle), and 'Create Quote'. Below the tabs, the 'Assignee' field is a dropdown menu with the text '— Select Staff Member —' and a downward arrow. Below the dropdown, it says 'Ticket is currently assigned to Coyote'. The 'Comments' field is a text area with the placeholder text 'Enter reasons for the assignment or instructions for assignee'. At the bottom, there are two buttons: 'Reassign' (green) and 'Reset' (white).

- **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.

Initiate Quotes 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

The screenshot shows a horizontal menu with five buttons: 'Post Reply', 'Post Internal Note', 'Dept. Transfer', 'Reassign Ticket', and 'Create Quote'. The 'Create Quote' button is circled in red. Below the menu is a 'Notes: *' field containing the text 'Create a quote for a printer connector cable'. At the bottom of the notes field are two buttons: 'Create' (green) and 'Reset' (grey).

- 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:

The screenshot shows a 'Ticket Actions' panel with a blue header and an upward arrow icon. Below the header, it says 'Ticket sent to Quote Manager'. There are three buttons: 'Post Reply', 'Post Internal Note', and 'Create Quote'. Below the buttons, it says 'Ticket sent to Quote Manager, [quote #1922](#)'. At the bottom, it says 'Notes: Create a quote for a printer connector cable'.

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

« HOME



ServiceDesk: System going sluggish

Sub-total	\$ 0.00
Tax	\$ 0.00
Grand Total including tax	\$ 0.00



**Quote
Number**
1712

For

To

Created
Feb 15,
2018
9:49 AM

Expires
May 16,
2018
9:49 AM

From
ServiceDesk

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

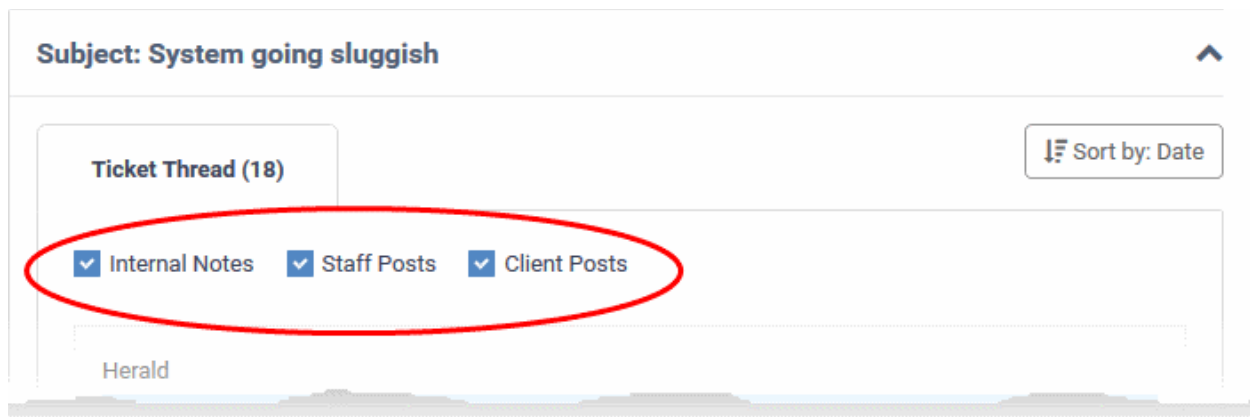
TO: <hertriumph@gmail.com>

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 (local time) ^							
+ Add Work Time							
Start	End	Time	Service Type	Staff	Billable	Manual	Action
2018-04-09 15:00:00	2018-04-09 15:30:00	00:30:00	Onsite	Coyote	✓	✓	
2018-04-10 12:27:23	2018-04-10 12:28:21	00:00:37	Remote	Coyote			
2018-04-10 14:34:06	2018-04-10 15:11:18	00:31:49	Telephone	Coyote			
2018-04-10 15:11:21	2018-04-10 16:56:00	00:27:28	Remote	Coyote	✓		
2018-04-11 09:30:00	2018-04-11 09:40:00	00:10:00	Remote	Steam	✓	✓	
2018-04-11 09:30:00	2018-04-11 09:45:00	00:15:00	Onsite	transtar	✓	✓	
2018-04-11 10:29:27	2018-04-11 10:32:45	00:00:41	Telephone	Steam			
2018-04-11 10:43:12	2018-04-11 10:44:39	00:01:27	Telephone	Coyote			
Total Spent		01:57:02					
Total Billable		01:22:28					

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: <ul style="list-style-type: none"> • 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

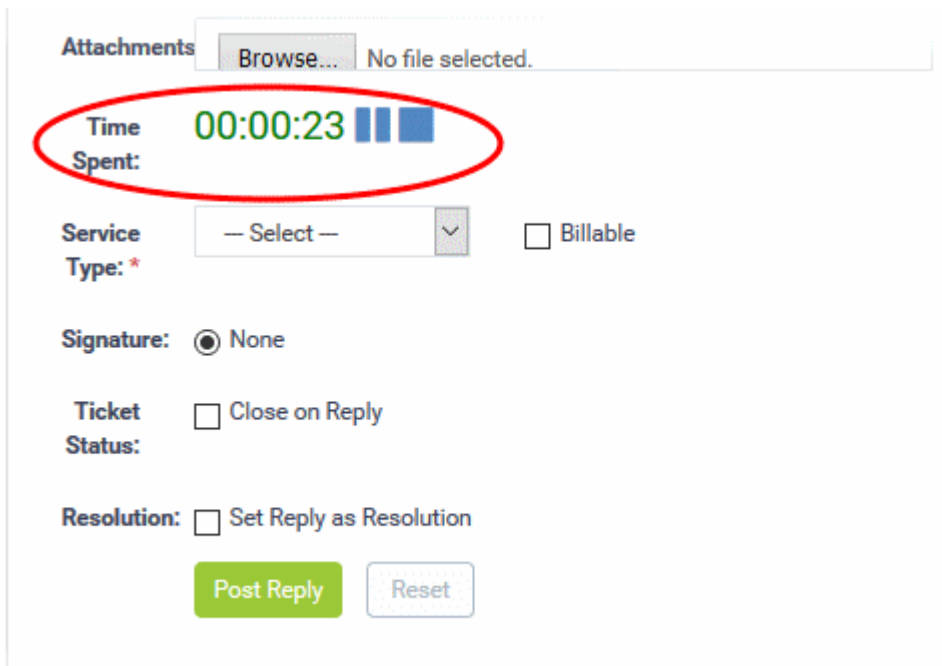
 - Delete the item

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:



The screenshot shows a form with the following elements:

- Attachments:** A field with a "Browse..." button and the text "No file selected."
- Time Spent:** A digital timer showing "00:00:23" with a pause icon (two vertical bars) and a stop icon (a square). This field is circled in red.
- Service Type:** A dropdown menu currently showing "— Select —" and a "Billable" checkbox.
- Signature:** A radio button selected for "None".
- Ticket Status:** A checkbox for "Close on Reply".
- Resolution:** A checkbox for "Set Reply as Resolution".
- Buttons:** A green "Post Reply" button and a grey "Reset" button.

- 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 screenshot shows a form for adding time to a ticket. At the top, there is an 'Attachments' section with a 'Browse...' button and the text 'No file selected.'. Below this, the 'Time Spent' is displayed as '00:01:03' with a progress bar. The 'Service Type' dropdown menu is open, showing options: 'Onsite', 'Remote', and 'Telephone'. The dropdown is highlighted with a red circle. To the right of the dropdown is a 'Billable' checkbox. Below the dropdown is the 'Signature' field. At the bottom, there is a 'Resolution' section with a 'Set Reply as Resolution' checkbox. Two buttons, 'Post Reply' and 'Reset', are located at the bottom of the form.

- 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

Time Spent (local time)

Start	End	Time	Service
2018-04-09 15:00:00	2018-04-09 15:30:00	00:30:00	Onsite
2018-04-10 08:00:00	2018-04-10 12:28:21	04:28:27	Remote



Add Work Time

Staff:

Start Time:

End Time:

Duration:

Service Type:

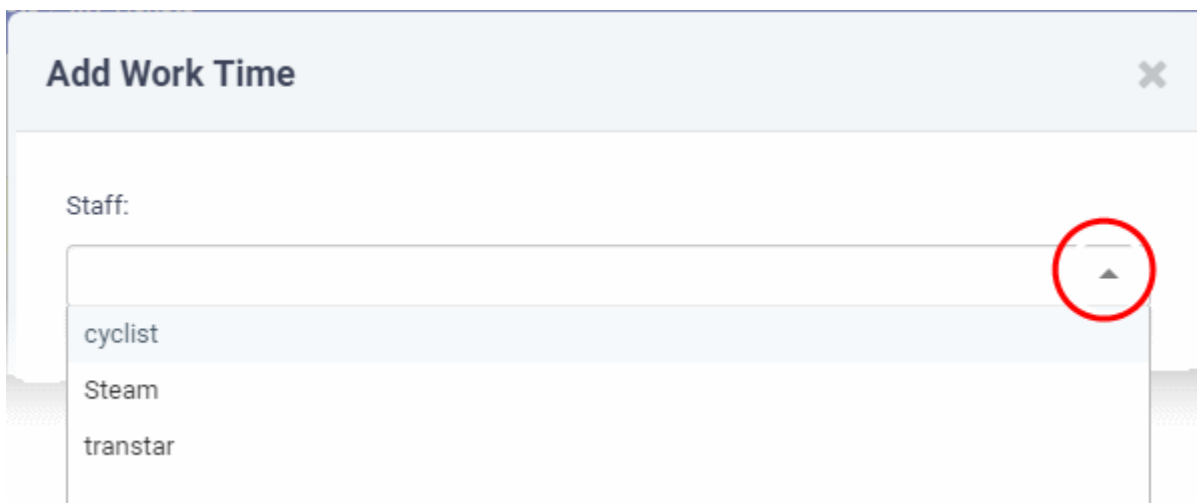
Is Billable:

Comment

Cancel Save

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.



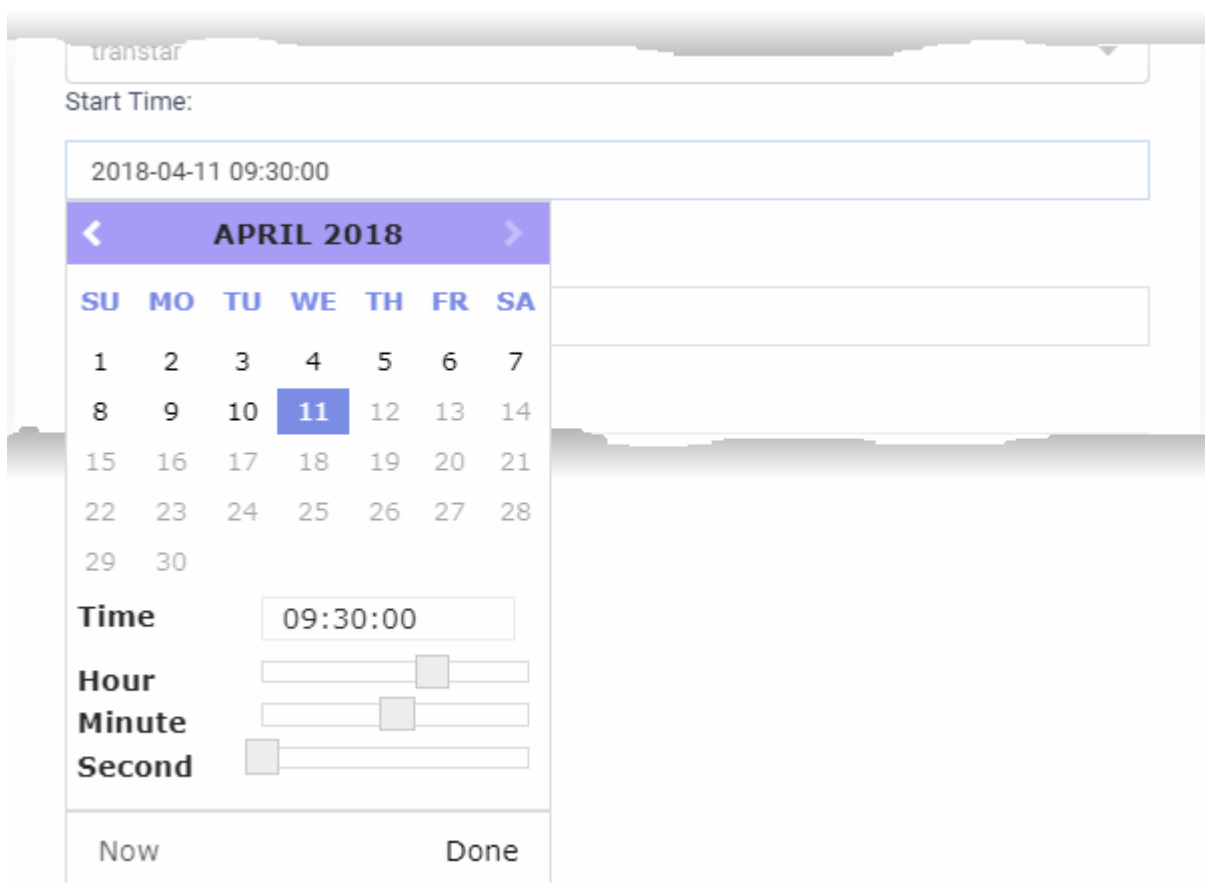
Add Work Time [X]

Staff:

cyclist
Steam
transtar

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.



transtar

Start Time:

2018-04-11 09:30:00

< **APRIL 2018** >

SU	MO	TU	WE	TH	FR	SA
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Time: 09:30:00

Hour: [Slider]

Minute: [Slider]

Second: [Slider]

Now Done

- 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:

Duration:

00:20:00

Service Type:

— Select —

— Select —

Onsite

Remote

Telephone

- 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 (1)				
Staff	Start	End	Time Zone	Action
jacob	2018-04-11 05:30:00	2018-04-11 10:00:00	GMT +05:18	

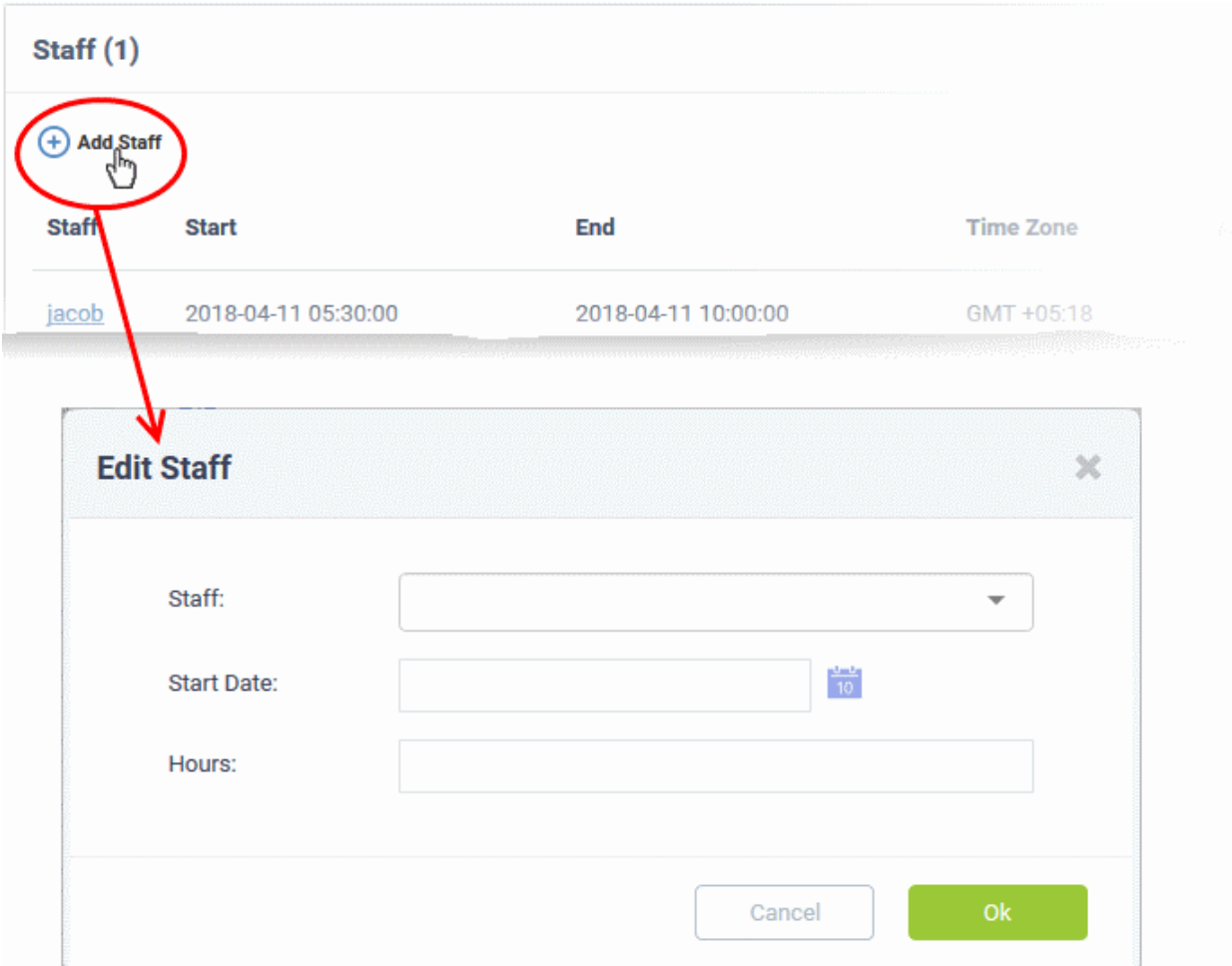
Staff - Column Descriptions

Column Header	Description
---------------	-------------

Staff	The name of the staff member added to the ticket. <ul style="list-style-type: none"> 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 screenshot shows a table with the following data:

Staff	Start	End	Time Zone
jacob	2018-04-11 05:30:00	2018-04-11 10:00:00	GMT +05:18

The 'Edit Staff' dialog box contains the following fields:

- Staff: [Drop-down menu]
- Start Date: [Text input] 
- Hours: [Text input]

Buttons: Cancel, Ok

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.

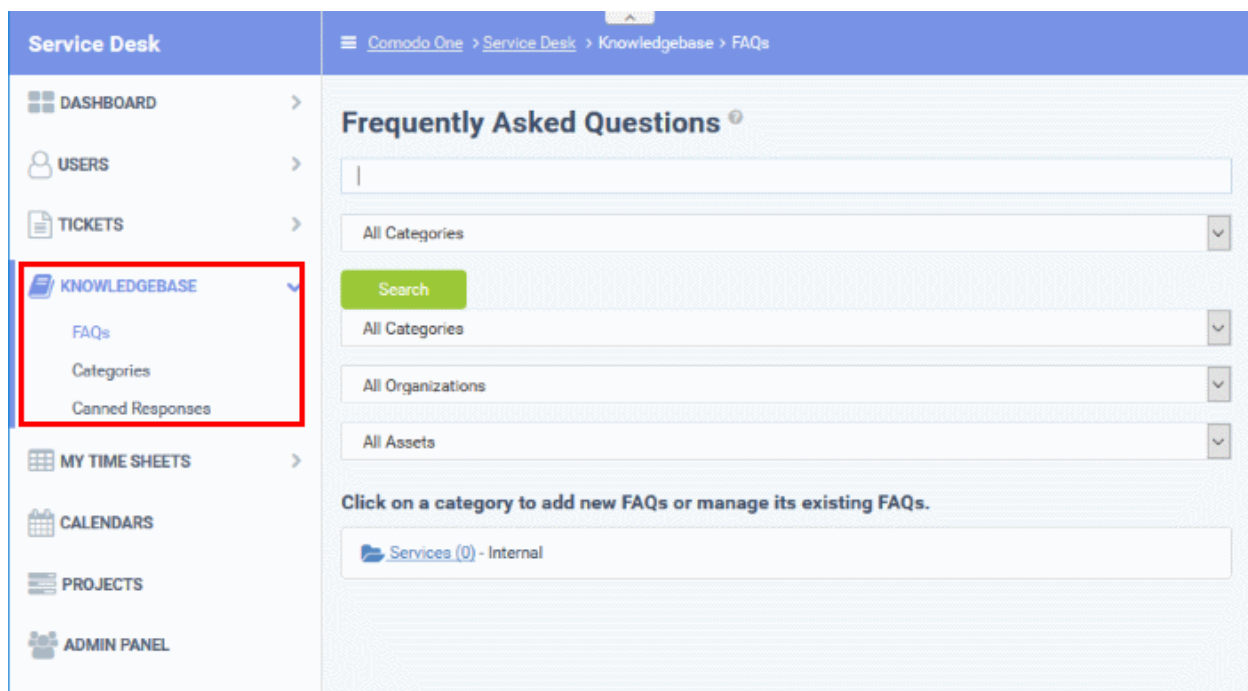
2.4 Manage Knowledgebase

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:

- **Managing FAQs**
- **Managing Categories**
- **Canned Responses**

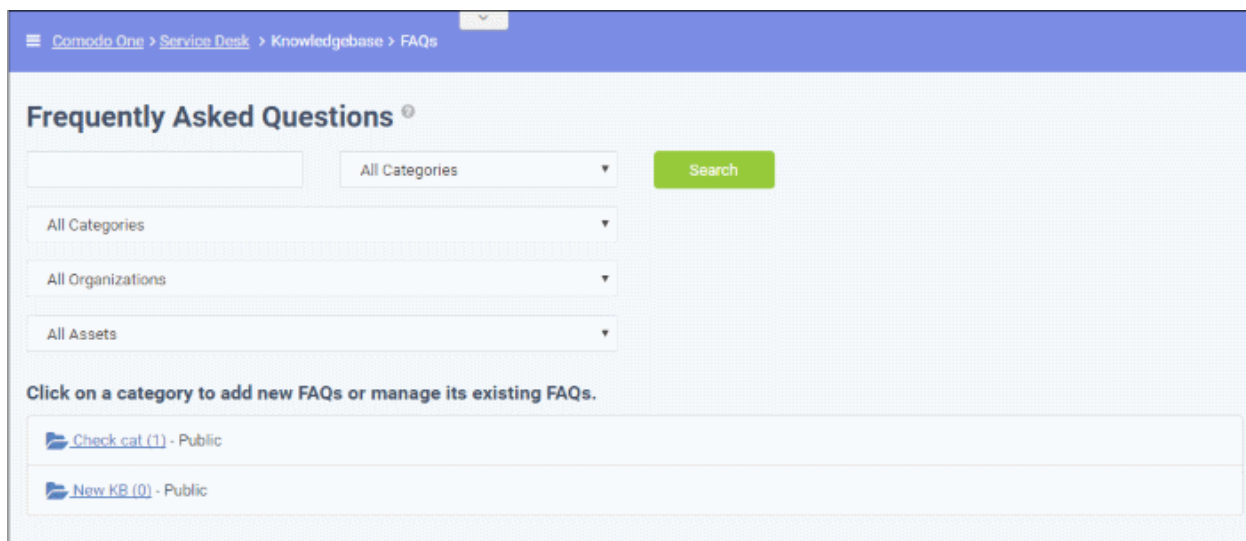
2.4.1 FAQs

- 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 **'Managing 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:

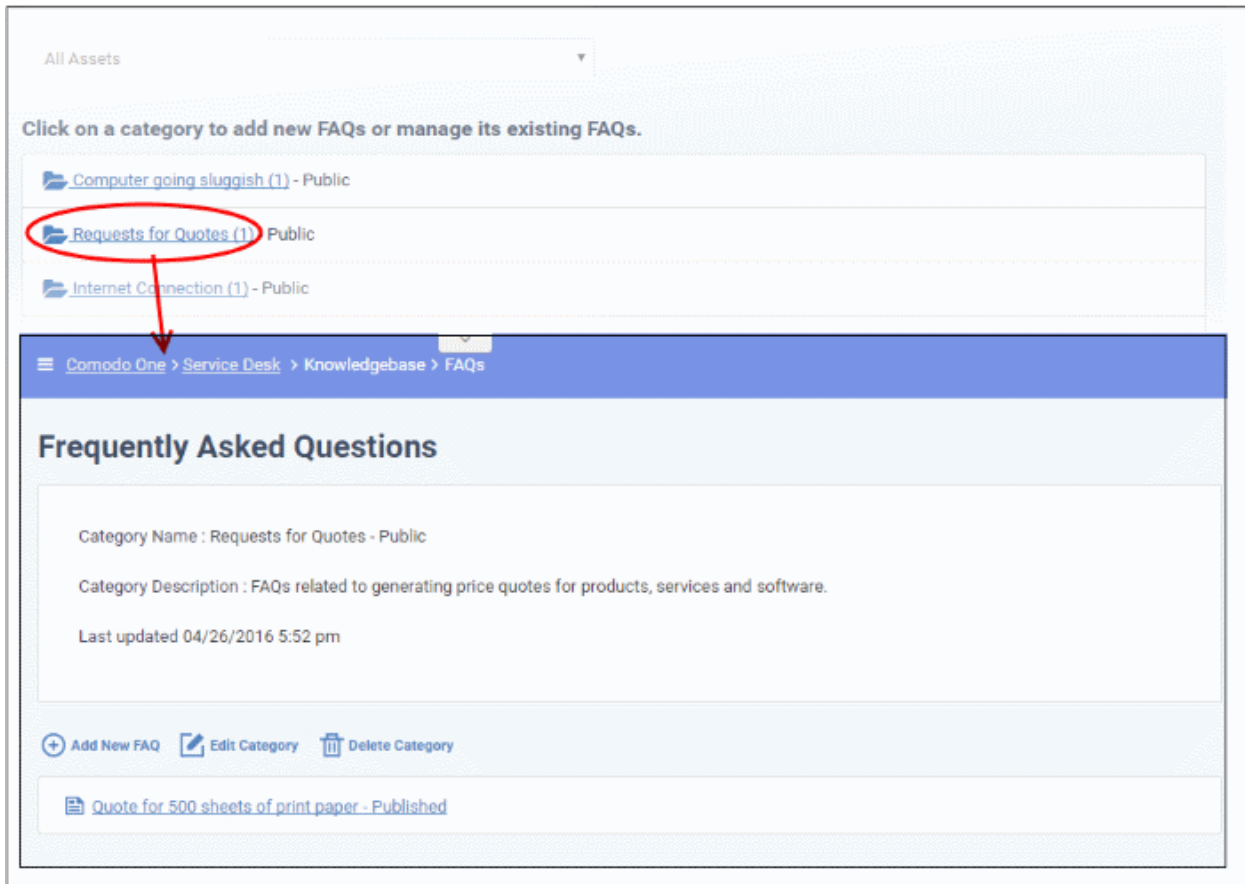
- Filters allow you to search for specific FAQs and/or narrow results by specifying the FAQ category, ticket category, organization or asset category.
- The 'All Organizations' and 'All Assets' options are used for searching ticket threads that have been added to the knowledgebase.
- To view all FAQs again, clear any filters and click the 'Search' button, or simply 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](#)**

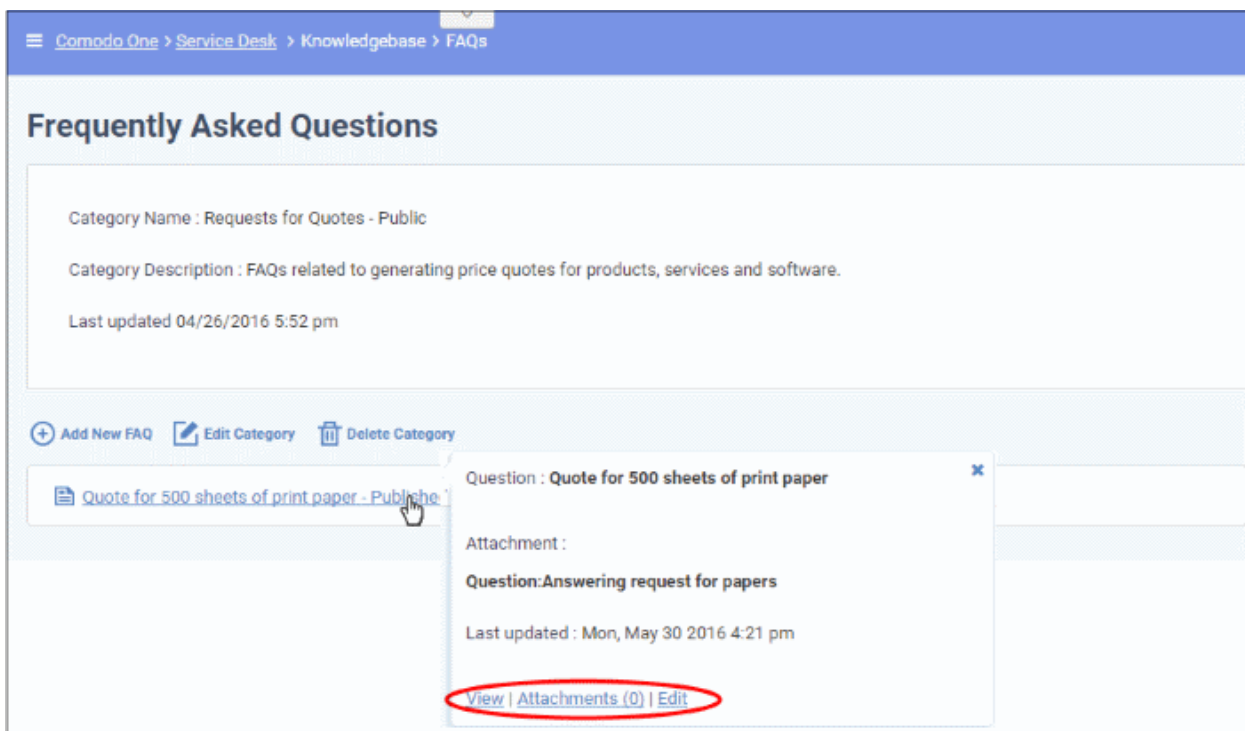
To view a FAQ

- Click the name of the category.



All FAQs in the category will be 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 a 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 **'Managing Categories'** for more details.

- Click 'Add New FAQ'

The 'Add New FAQ' screen will be displayed.

The screenshot shows the 'Add New FAQ' form in the Comodo One Service Desk. The form is titled 'FAQ' and includes the following sections:

- Add New FAQ**: The main heading for the form.
- Question**: A text input field for the question.
- Category Listing**: A dropdown menu labeled 'FAQ category the question belongs to.' with 'Check cat (Public)' selected.
- Listing Type**: Radio buttons for 'Public (publish)' and 'Internal (private)'. 'Internal (private)' is selected.
- Answer**: A rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, link, unlink, list, and other text formatting options.
- Attachments**: A section with the text '(optional) Select files to upload.' and a 'Choose File' button. Below the button, it says 'No file chosen'.
- Categories**: A section titled 'Check all categories related to this FAQ.' with a list of categories, each with a checkbox:
 - Access Issue / Report a Problem
 - Access to sharepoint
 - Feedback
 - General Inquiry
 - Report a Problem
- Internal Notes**: A text area for internal notes.
- Buttons**: At the bottom, there are three buttons: 'Add FAQ' (green), 'Reset' (blue), and 'Cancel' (blue).

FAQ Information

- **Question:** Enter the question label. For example, 'How do I change my account password?'.
- **Category Listing:** Select the category 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

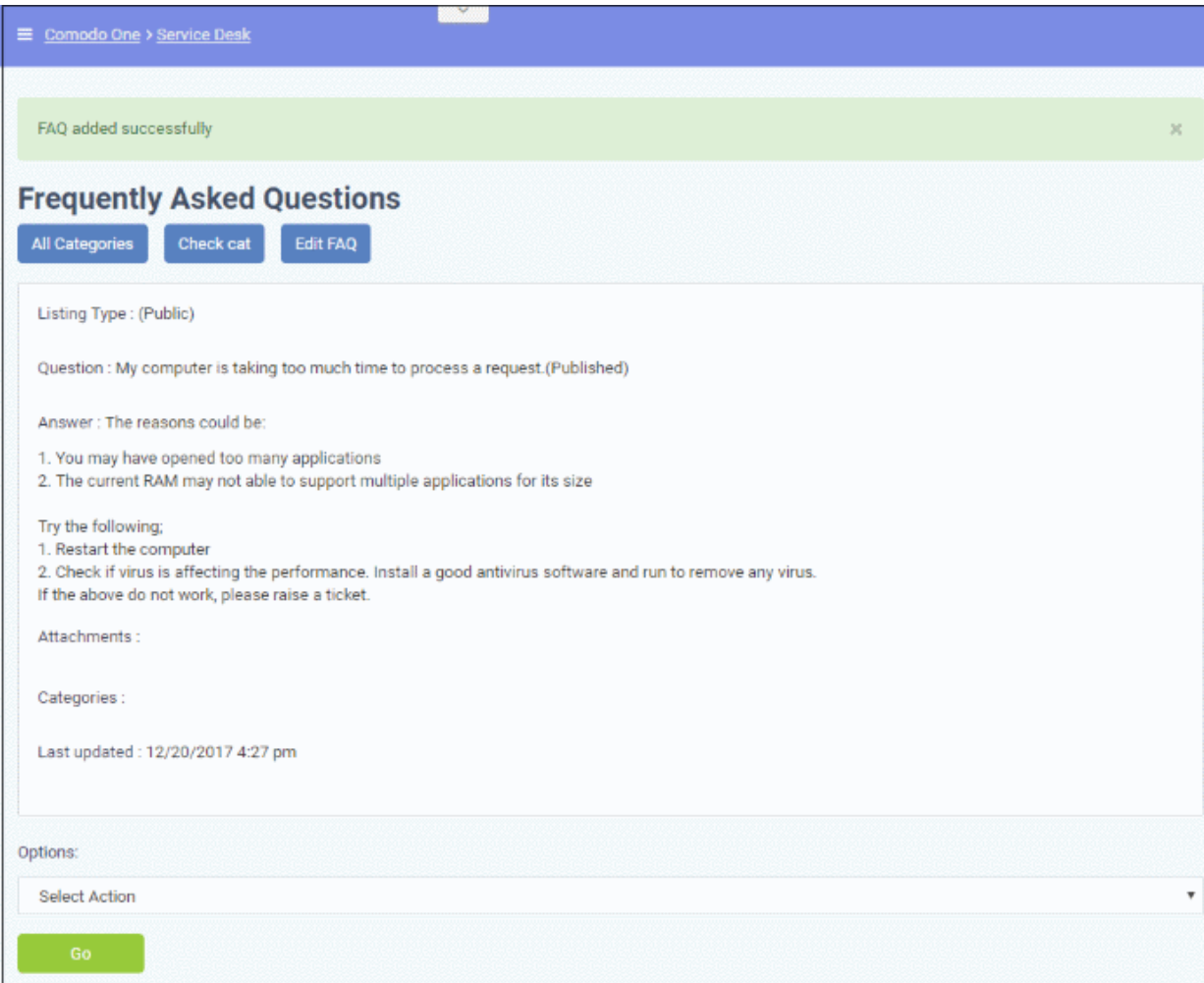
- Select ticket categories that should be listed as 'related' in the FAQ. This will also help users to locate the FAQ if they search by ticket category in the web portal.

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.



The screenshot shows the 'Frequently Asked Questions' management interface. At the top, there is a navigation bar with 'Comodo One > Service Desk'. Below it, a green notification bar states 'FAQ added successfully'. The main content area is titled 'Frequently Asked Questions' and contains three buttons: 'All Categories', 'Check cat', and 'Edit FAQ'. The FAQ entry displayed has the following details:

- Listing Type : (Public)
- Question : My computer is taking too much time to process a request.(Published)
- 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 :
- Categories :
- Last updated : 12/20/2017 4:27 pm

At the bottom, there is an 'Options:' section with a 'Select Action' dropdown menu and a green 'Go' button.

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

Editing a 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.

To edit a 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.

Comodo One > Service Desk > Knowledgebase > FAQs

Frequently Asked Questions

Category Name : Check cat - Public

Category Description : Check

Last updated 12/08/2017 2:41 pm

[+ Add New FAQ](#) [Edit Category](#) [Delete Category](#)

- [My computer is taking too much time to process a request. - Published](#)
- [What is my new faq - Published](#)

- Click on the FAQ that you want to edit.

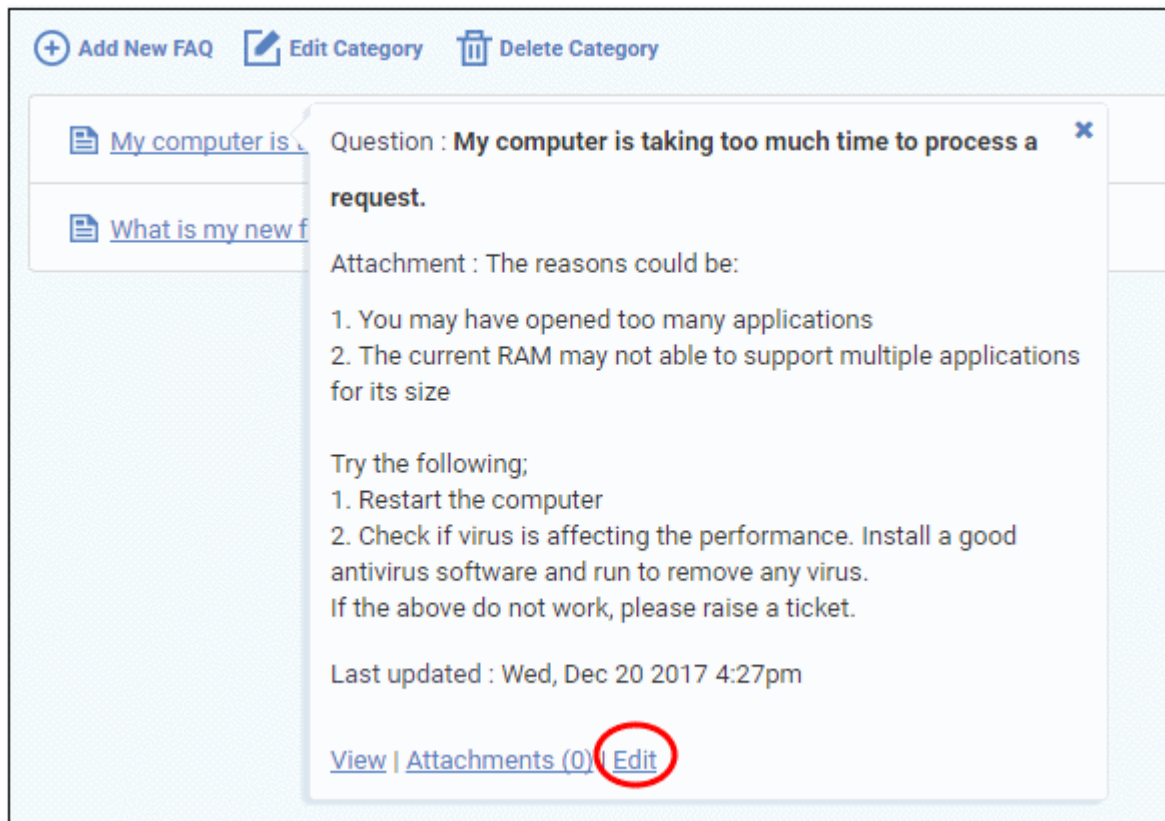
The 'FAQ' details screen will be displayed.

The screenshot displays the 'Frequently Asked Questions' interface in the Comodo One Service Desk. At the top, there is a navigation bar with 'Comodo One > Service Desk'. Below this, the title 'Frequently Asked Questions' is followed by three buttons: 'All Categories', 'Check cat', and 'Edit FAQ'. The main content area contains the following information:

- Listing Type : (Public)
- Question : My computer is taking too much time to process a request.(Published)
- 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 :
- Categories : Report a Problem / Access Issue, Access to sharepoint, Feedback, General Inquiry, Report a Problem
- Last updated : 12/20/2017 4:27 pm

At the bottom, there is an 'Options:' section with a dropdown menu labeled 'Select Action' and a green 'Go' button.

- 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

<> [bold] Aa B I U A A S [bulleted list] [numbered list] [link] [image] [video] [table] [undo] [redo] [print] [clear]

The reasons could be:

1. You may have opened too many applications
2. The current RAM may not be 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.

Publishing / Unpublishing a 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.

To publish/unpublish a FAQ

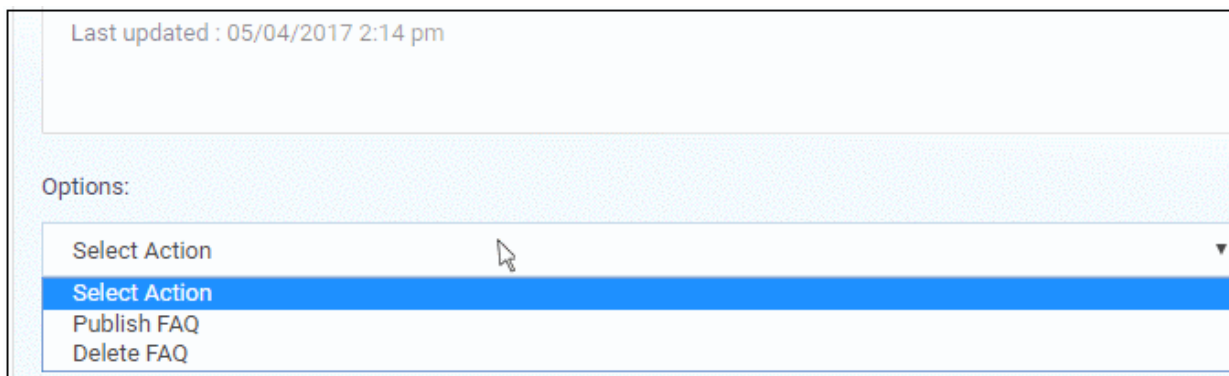
- Click the name of the category from the FAQ interface

The list of FAQs in the category will be displayed.

- Click the FAQ that you want to 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.



The screenshot shows a user interface for editing a FAQ. At the top, it says "Last updated : 05/04/2017 2:14 pm". Below this is a section labeled "Options:" which contains a drop-down menu. The menu is currently open, showing four options: "Select Action" (highlighted in blue), "Publish FAQ", "Delete FAQ", and "Unpublish FAQ". A mouse cursor is pointing at the "Select Action" option.

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 a FAQ](#) for more details.

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.

Computer going sluggish (Public)

Listing Type: Public (publish) Internal (private)

Answer

<> [Rich Text Editor Icons]

Removing a FAQ

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

To delete a FAQ

- 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.

Options:

Select Action

Select Action

Publish FAQ


Delete FAQ

The 'FAQ' will be deleted from the category.

2.4.2 Manage 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.



NAME	TYPE	FAQS	LAST UPDATED
Computer going sluggish	Public	1	05/04/2017 12:57 pm
Requests for Quotes	Public	1	04/26/2016 5:52 pm
Internet Connection	Public	1	05/30/2016 4:22 pm
Printer Issues	Public	1	05/30/2016 4:24 pm

Column Headers

- **Name:** The name of the category. Click a name to open its **update screen**.
- **Type:** Indicates whether the category is published or internal.
- **FAQs:** Displays 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

FAQ Categories

[+ Add New Category](#) [Make Public](#) [Make Internal](#) [Delete](#) Show 10 records Search...

FAQ Category

Add New Category

Category information ⓘ

Category Type : Public (publish) Private (internal)

Visible for role : All Only Selected

Role

Visible for Organization : All Only Selected

Organization

Category Name: Short descriptive name.

Category Description: Summary of the category.

Internal Notes

Add Reset Cancel

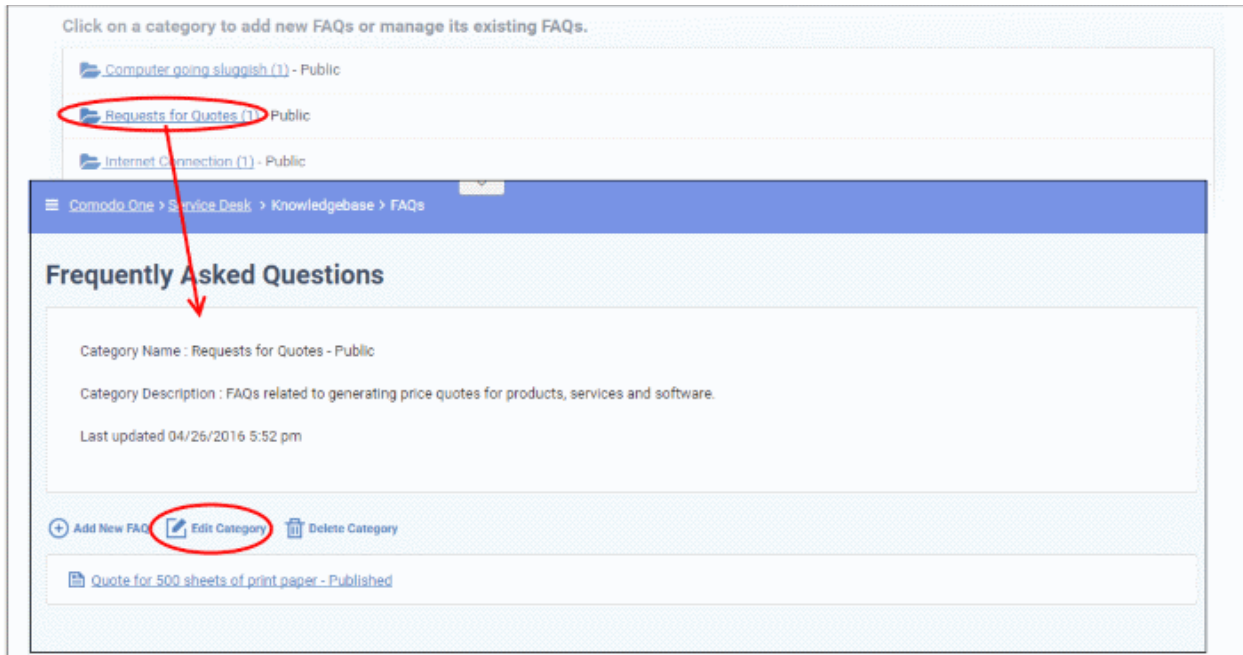
The 'Add New Category' screen will be displayed.

- **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:** Allows you to specify which staff role(s) can view the FAQs in the category. Select 'All' to allow all roles to view them. Choose 'Only Selected' to restrict visibility to certain staff roles.
- **Visible for Organizations:** Allows you to decide which organizations' users can view the FAQ category. Select 'All' to allow users from all organizations to view them. Choose 'Only Selected' to restrict visibility to the users of certain organizations.
- **Category Name:** Enter a short, descriptive name 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.

Comodo One > Service Desk > Knowledgebase > Categories

FAQ Categories

+ Add New Category Make Public Make Internal Delete Show 10 records Search...

NAME	TYPE	FAQS	LAST UPDATED
Computer going sluggish	Public	1	05/04/2017 12:57 pm
Requests for Quotes	Public	1	04/26/2016 5:52 pm

FAQ Category

Update Category: Requests for Quotes

Category information

Category Type : Public (publish) Private (Internal)

Visible for role : All Only Selected

Role

Visible for Organization : All Only Selected

Organization

Category Name: Short descriptive name.
Requests for Quotes

Category Description: Summary of the category.
FAQs related to generating price quotes for products, services and software.

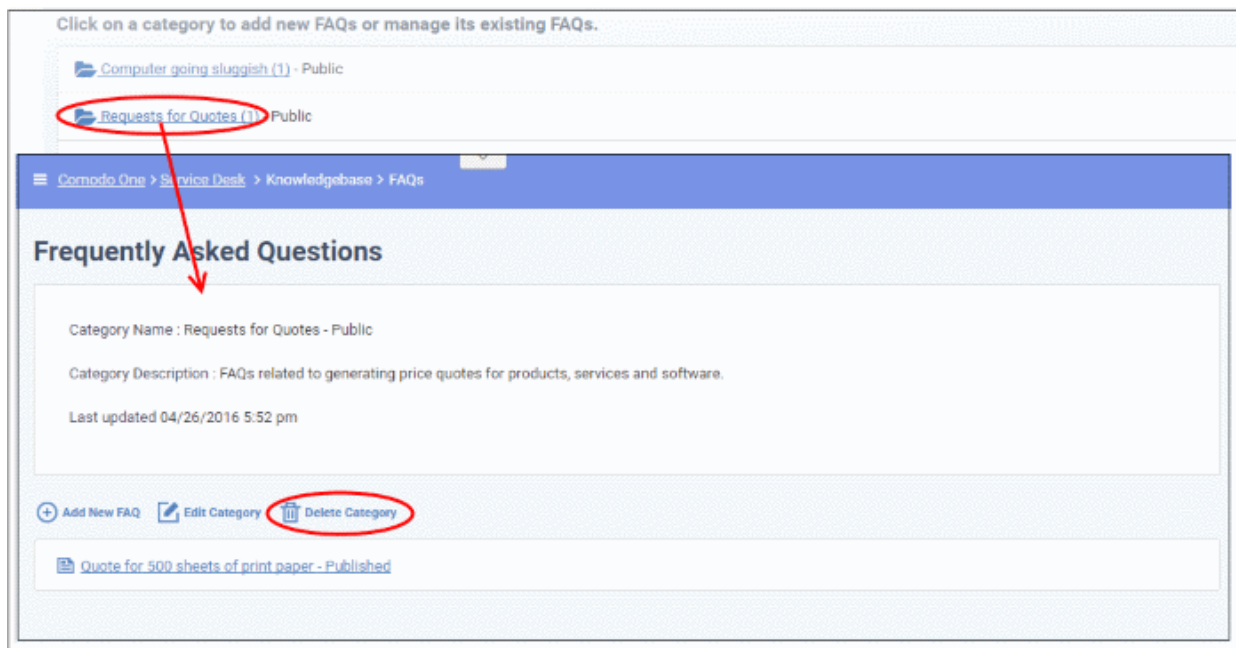
Internal Notes

Save Changes **Reset** **Cancel**

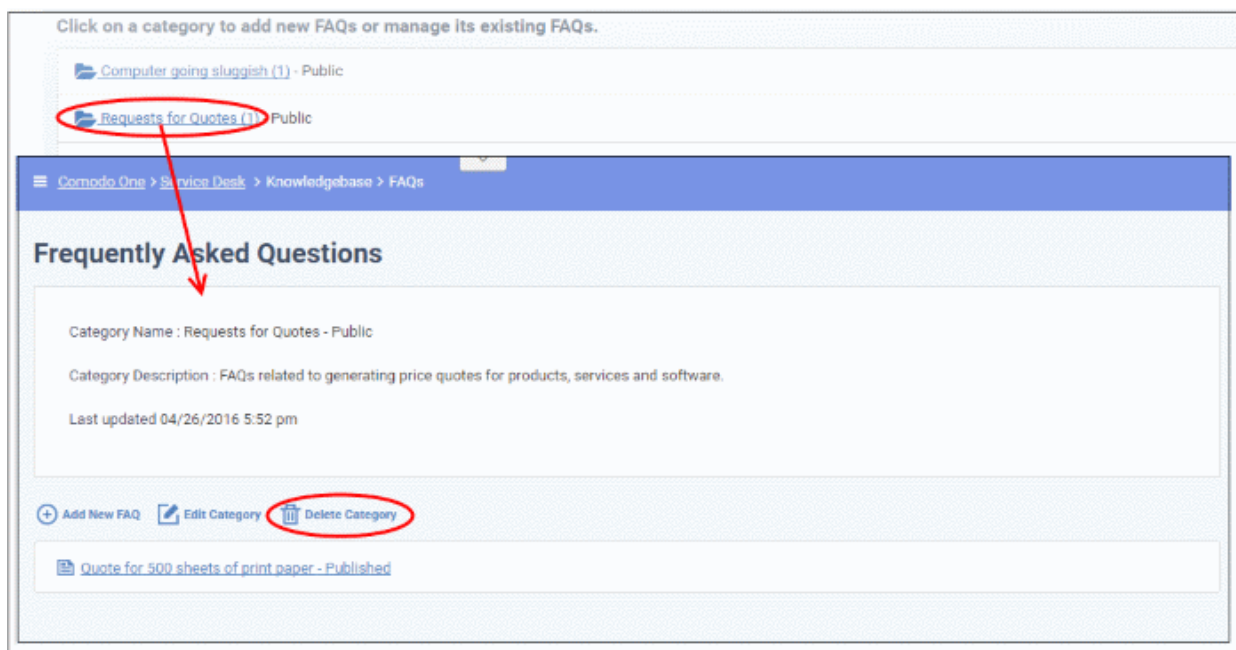
- Edit the category as required and click the 'Save Changes' button.

To delete a category

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



- Alternatively, open 'Knowledgebase > '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



FAQ Categories

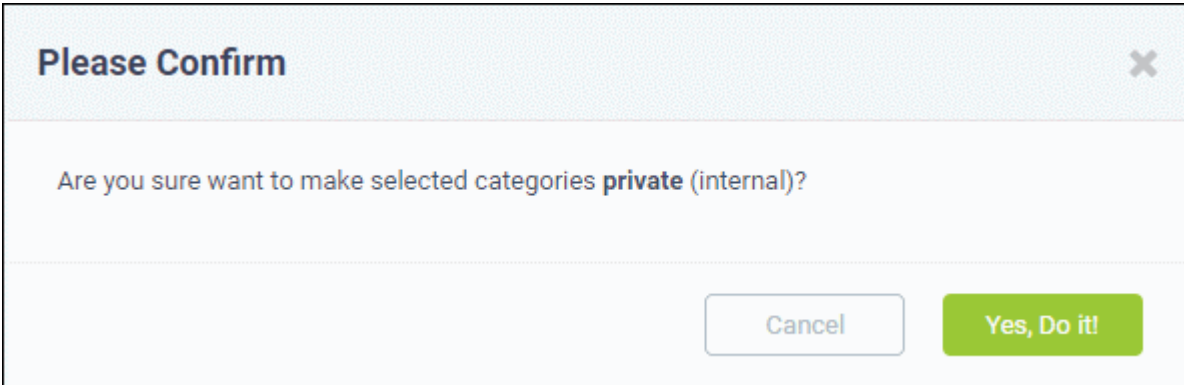
➕ Add New Category  Make Public  Make Internal  Delete

Show 10 records Search...

<input type="checkbox"/>	NAME	TYPE	FAQS	LAST UPDATED
<input type="checkbox"/>	Computers going sluggish	Public	1	05/04/2017 12:57 pm
<input type="checkbox"/>	Requests for Quotes	Public	1	04/26/2016 5:52 pm
<input checked="" type="checkbox"/>	Internet Connection	Public	1	05/30/2016 4:22 pm
<input type="checkbox"/>	Printer Issues	Internal	1	05/30/2016 4:24 pm

« Prev 1 Next »

- 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.



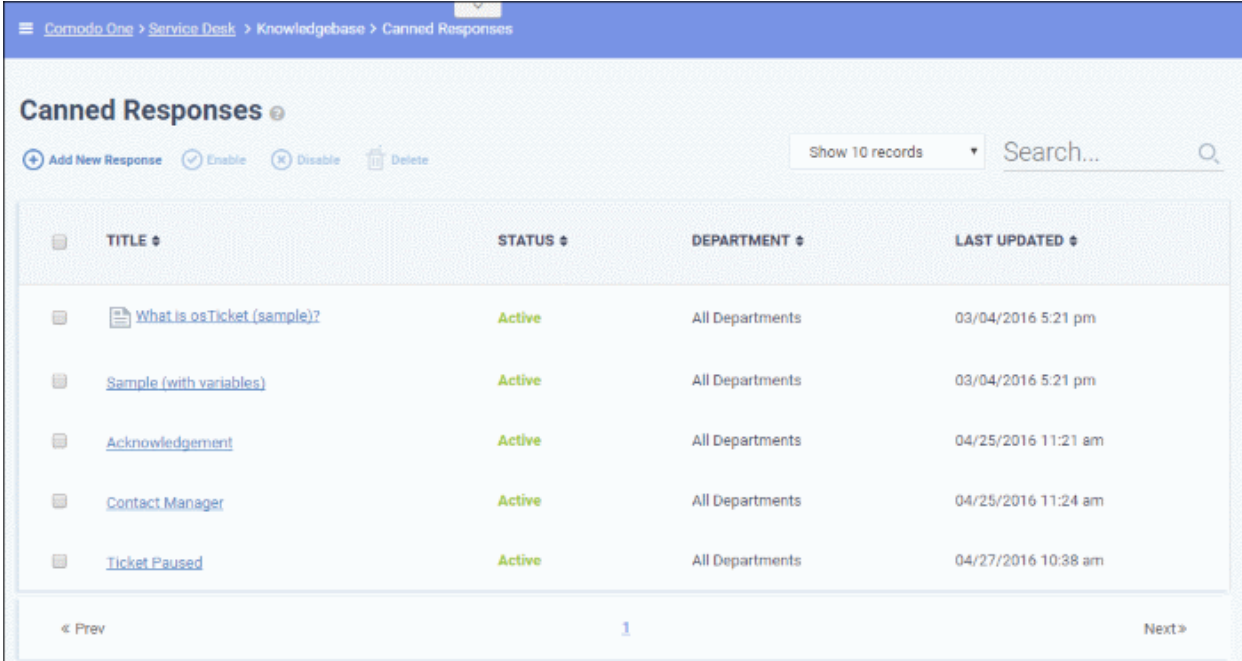
Please Confirm ✕

Are you sure want to make selected categories **private** (internal)?

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'.



TITLE	STATUS	DEPARTMENT	LAST UPDATED
What is osTicket (sample)?	Active	All Departments	03/04/2016 5:21 pm
Sample (with variables)	Active	All Departments	03/04/2016 5:21 pm
Acknowledgement	Active	All Departments	04/25/2016 11:21 am
Contact Manager	Active	All Departments	04/25/2016 11:24 am
Ticket Paused	Active	All Departments	04/27/2016 10:38 am

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

Canned Responses ⓘ

[+ Add New Response](#) Enable Disable Delete

Show 10 records ▾ Search... 🔍

Canned Response ⓘ

Add New Canned Response

Canned Response Settings

Status: Active Disabled

Department :

Canned Response: Make the title short and clear

Title

Canned Response * (Supported Variables)

Canned Attachments (optional) ⓘ
 No file chosen
You can upload up to 10 attachments per canned response.

Internal Notes: Notes about the canned response

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.

The screenshot shows the 'Canned Response' editor interface. At the top, there is a dropdown menu for 'Supported Variables' which is circled in red. Below this is a text editor with a rich text toolbar. To the right of the editor is a 'Ticket Variables' panel. This panel contains a list of variables categorized into Base Variables, Other Variables, Name Expansion, Expandable Variables, and Scheduled Reports Variables. Each variable is listed with its corresponding description.

Base Variables	Other Variables
%{ticket.id}	%{message}
%{ticket.number}	%{response}
%{ticket.email}	%{comments}
%{ticket.name}	%{note}
%{ticket.subject}	%{assignee}
%{ticket.phone}	%{assigner}
%{ticket.status}	%{url}
%{ticket.priority}	%{reset_link}
%{ticket.asset}	
%{ticket.category}	
%{ticket.subcategory}	
%{ticket.assigned}	
%{ticket.create_date}	
%{ticket.due_date}	
%{ticket.close_date}	
%{ticket.auth_token}	
%{ticket.client_link}	
%{ticket.staff_link}	

Name Expansion
.first
.middle
.last
.full
.legal
.short
.formal
.shortformal
.lastfirst

Expandable Variables (See Wiki)
%{ticket.topic}
%{ticket.dept}
%{ticket.staff}
%{ticket.team}

Scheduled Reports Variables
%{report.type}
%{recipient.name}
%{report.datetime_from}
%{report.datetime_to}

- 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

Canned Responses

+ Add New Response Enable Disable Delete Show 10 records Search...

TITLE	STATUS	DEPARTMENT	LAST UPDATED
What is osTicket (sample)?	Active	All Departments	03/04/2016 5:21 pm
Sample (with variables)	Passive	All Departments	03/04/2016 5:21 pm

Canned Response

Update Canned Response

Canned Response Settings

Status: Active Disabled

Department: All Departments

Canned Response: Make the title short and clear

Title: Sample (with variables)

Canned Response * (Supported Variables)

Hi {ticket.name.first},

{ticket.name.last} {ticket.name.first} is in {ticket.dept.name} department.

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

Canned Responses

+ Add New Response ✓ Enable ✗ Disable 🗑 Delete

Show 10 records Search...

TITLE	STATUS	DEPARTMENT	LAST UPDATED
<input checked="" type="checkbox"/> What is osTicket (sample)?	Active	All Departments	03/04/2016 5:21 pm
<input type="checkbox"/> Sample (with variables)	Passive	All Departments	03/04/2016 5:21 pm
<input type="checkbox"/> Acknowledgement	Active	All Departments	04/25/2016 11:21 am
<input type="checkbox"/> Contact Manager	Active	All Departments	04/25/2016 11:24 am
<input type="checkbox"/> Ticket Paused	Active	All Departments	04/27/2016 10:38 am

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

Please Confirm ✕

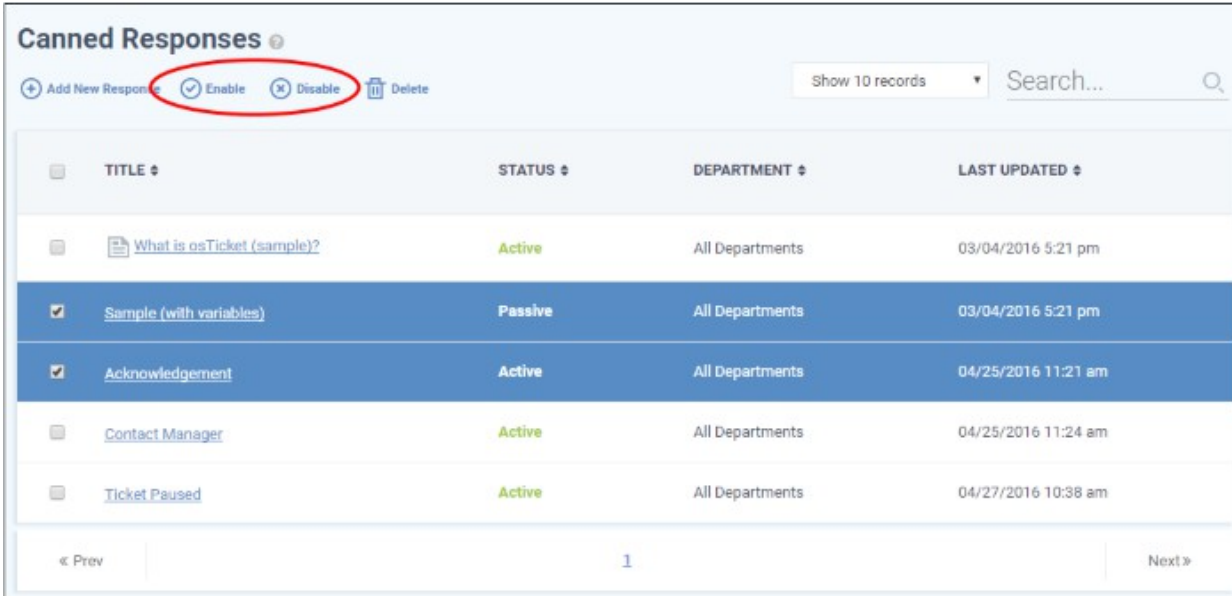
Are you sure you want to DELETE selected canned responses?

Deleted items CANNOT be recovered, including any associated attachments.

No, Cancel Yes, Do it!

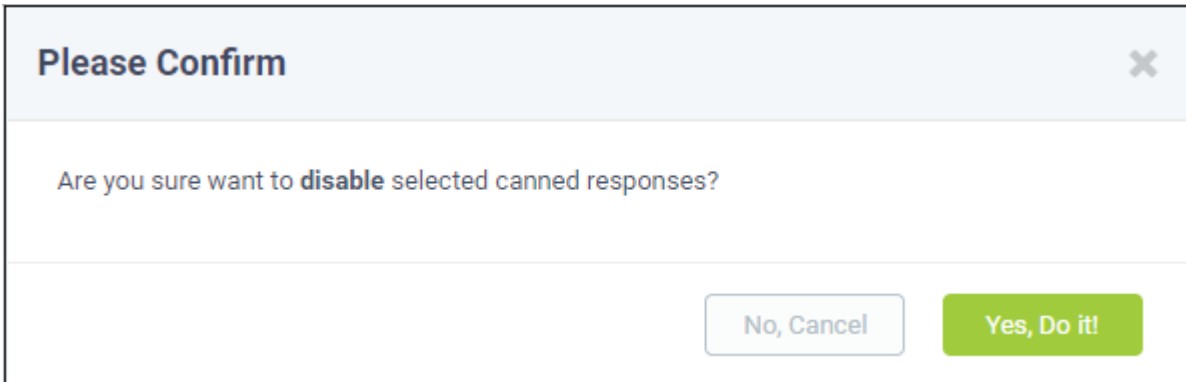
Enable or disable a 'Canned Response'

- 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



TITLE	STATUS	DEPARTMENT	LAST UPDATED
What is osTicket (sample)?	Active	All Departments	03/04/2016 5:21 pm
<input checked="" type="checkbox"/> Sample (with variables)	Passive	All Departments	03/04/2016 5:21 pm
<input checked="" type="checkbox"/> Acknowledgement	Active	All Departments	04/25/2016 11:21 am
Contact Manager	Active	All Departments	04/25/2016 11:24 am
Ticket Paused	Active	All Departments	04/27/2016 10:38 am

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



Please Confirm ✕

Are you sure want to **disable** selected canned responses?

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'.

PROJECT NAME	DURATION (HRS)	COMP	TIME SPENT	BILLABLE TIME	START DATE	END DATE
abc	1	0	00:00:00	00:00:00	04/12/2016	01/01/1970
Scan Computers	50	63.8	62:07:09	61:58:09	04/28/2016	05/02/2016
Setup a printer at customer network	58	10	06:49:38	01:01:38	05/03/2016	05/08/2016
test	1	0	00:00:00	00:00:00	09/13/2016	01/01/1970
setup printer	2	3	00:04:38	00:01:02	12/20/2016	12/20/2016
Setup External Korumail Device	2	17.5	01:06:00	00:00:00	01/04/2017	01/04/2017

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:

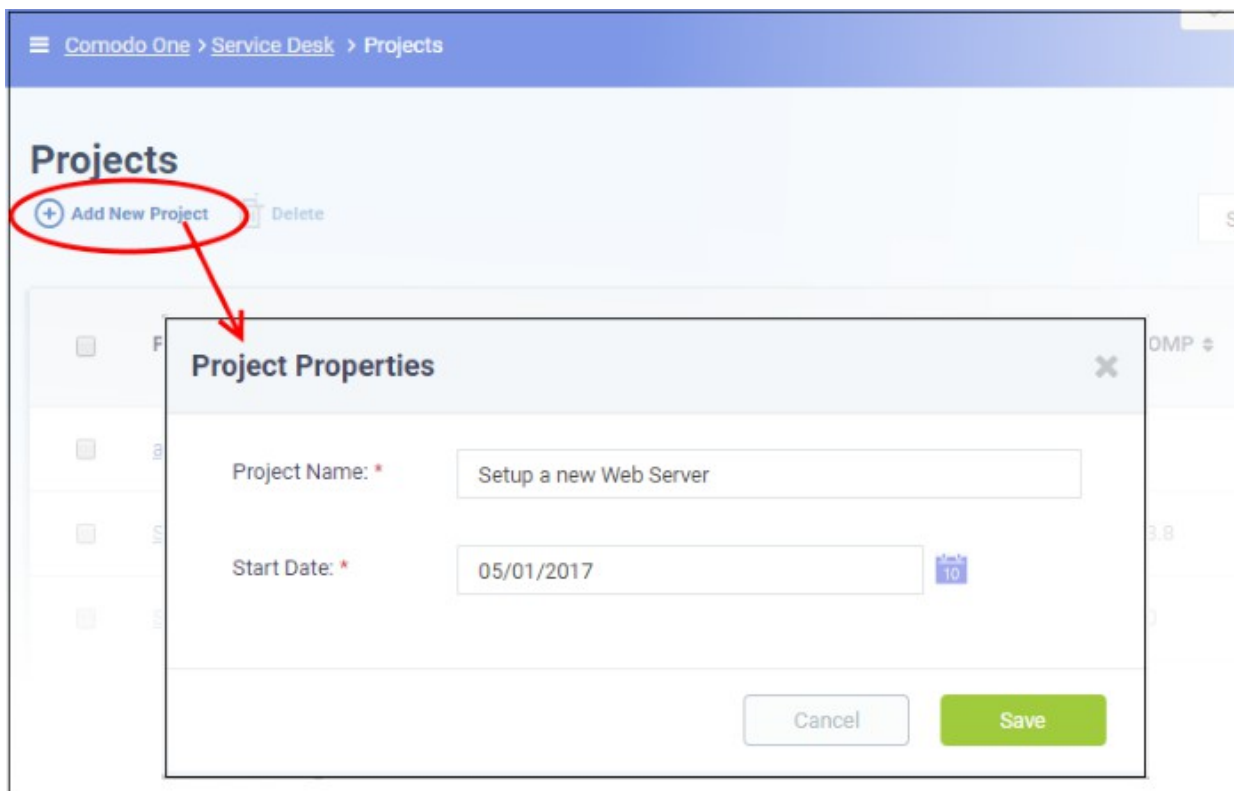
- **Create a new project and add Tasks and Sub Tasks**
- **View the project status and update it**
- **Remove a project**

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

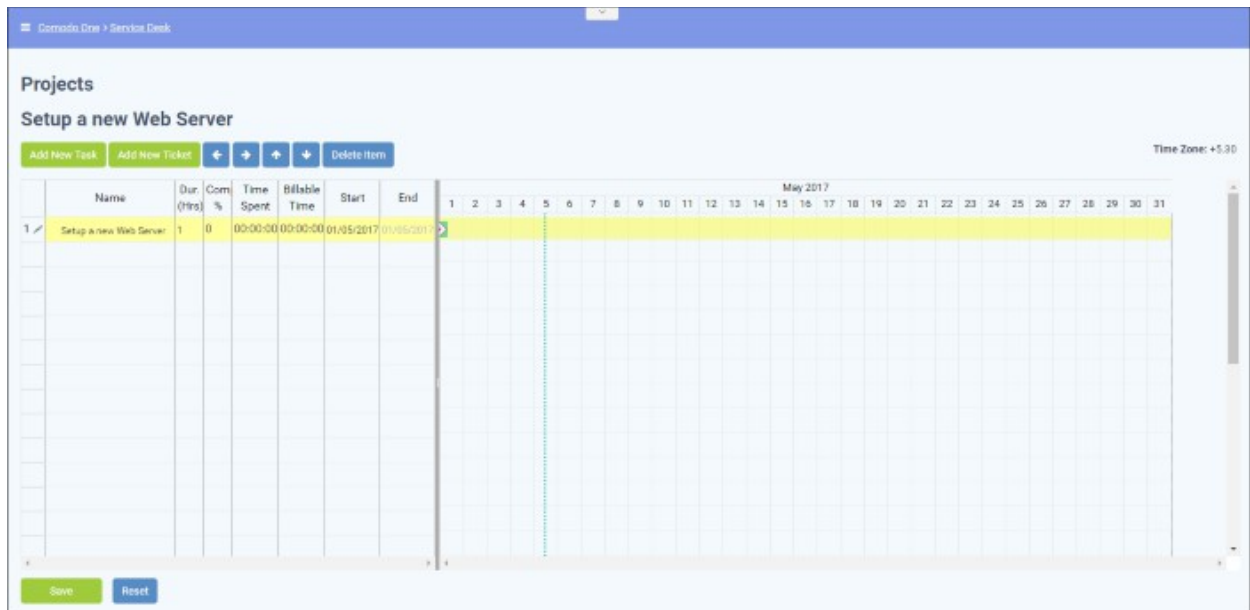
- Click 'Add New Project' from the 'Projects' interface



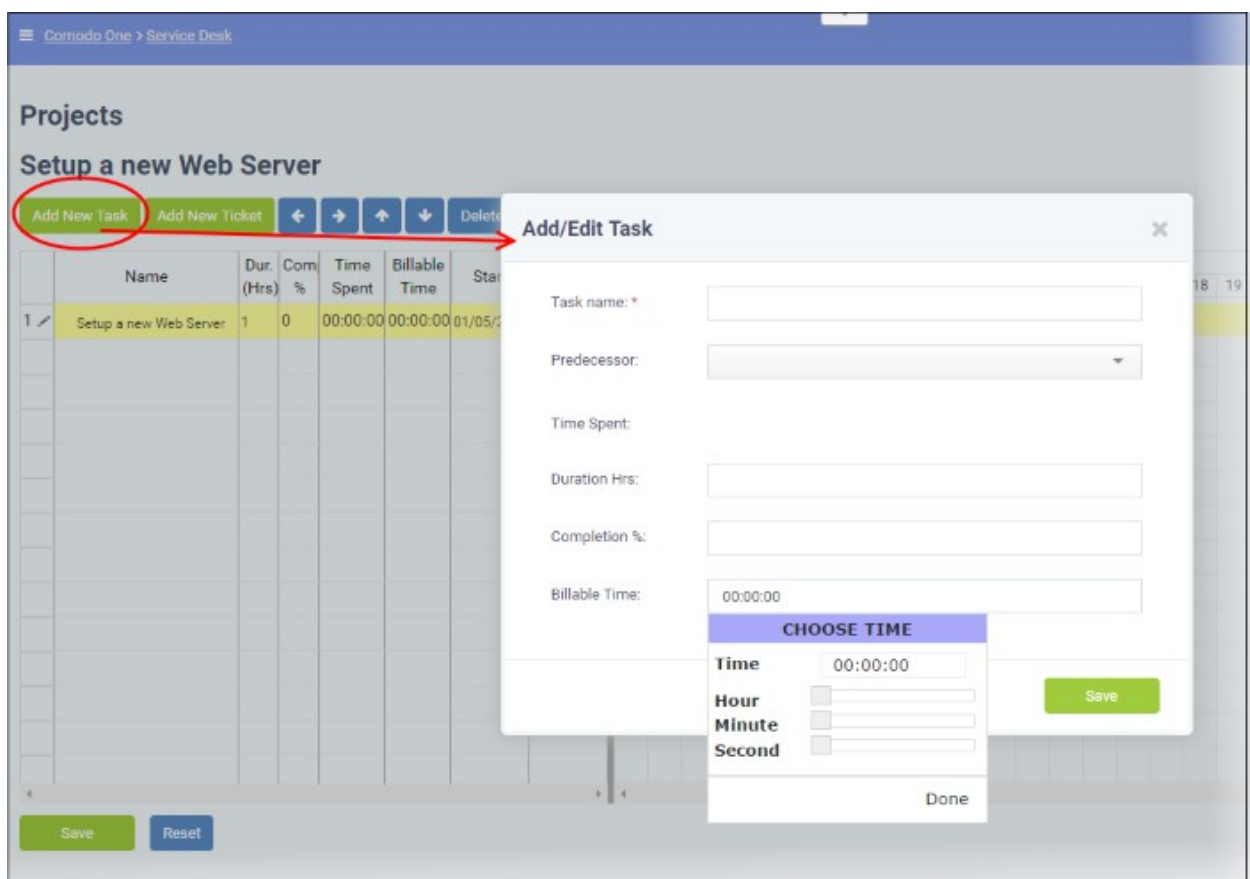
The Project Properties dialog will appear.

- 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.

Add/Edit Task ✕

Task name: *

Predecessor:

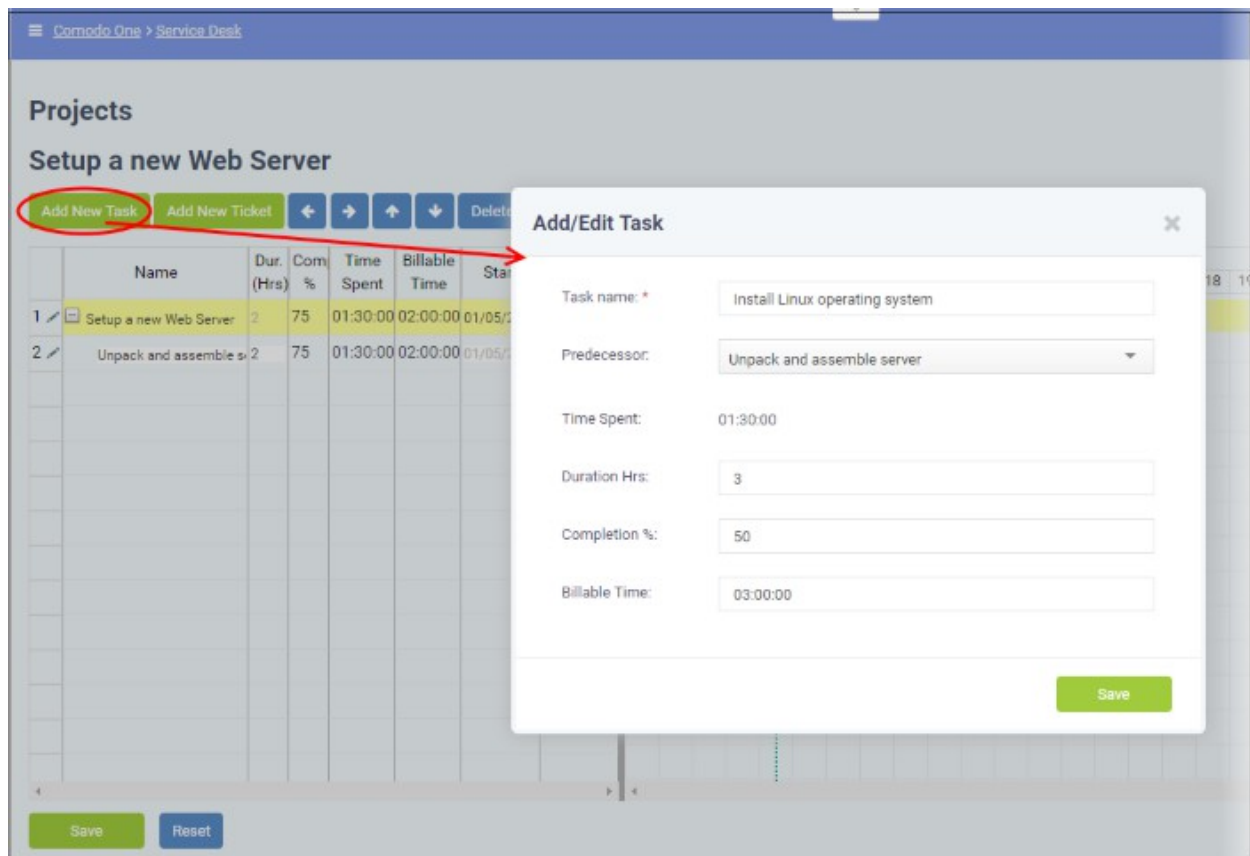
Time Spent: 01:30:00

Duration Hrs:

Completion %:

Billable Time:

- 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.

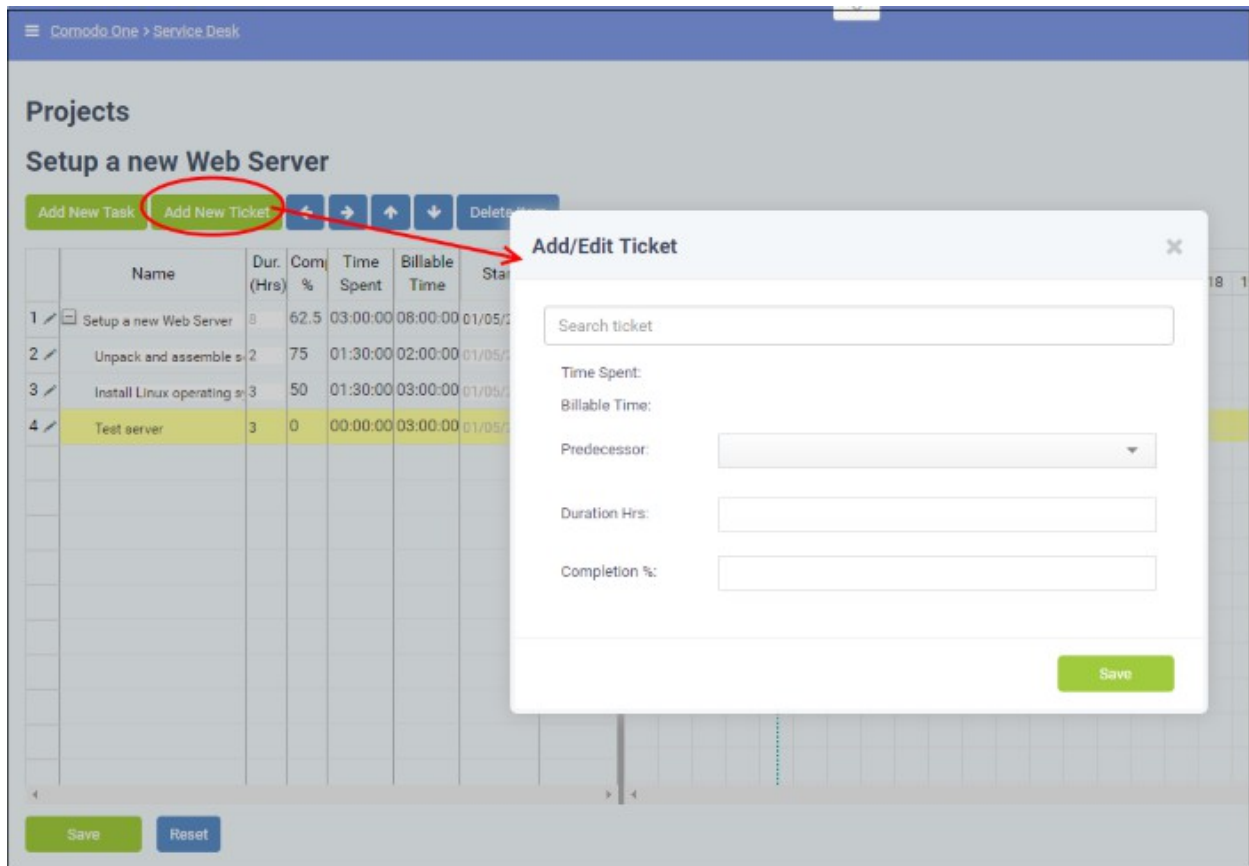
- Enter the name for the task
- Enter the predecessor to continue from the previous task/subtask.
- Enter the time duration required (in hours) to complete the task in the 'Duration' field
- If the task is in-progress, enter the completion percentage on it in the 'Completion %' field

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.

Add/Edit Ticket ✕

Ticket #23

Time Spent: 22:58:09

Billable Time: 22:58:09

Predecessor: ▼

Duration Hrs:

Completion %:

- Click 'Save'.

The ticket will be linked to the task.

Projects
Setup a new Web Server

Time Zone: +5:30

Name	Dur. (Hrs)	Com. %	Time Spent	Billable Time	Start	End
1 Setup a new Web Server	15	66.7	25:58:09	27:58:09	01/05/2017	02/05/2017
2 Unpack and assemble	2	75	01:30:00	02:00:00	01/05/2017	01/05/2017
3 Install Linux operating	3	50	01:30:00	03:00:00	01/05/2017	01/05/2017
4 Test server	10	75	22:58:09	22:58:09	01/05/2017	02/05/2017
5 Ticket #23	10	75	22:58:09	22:58:09	01/05/2017	02/05/2017

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.

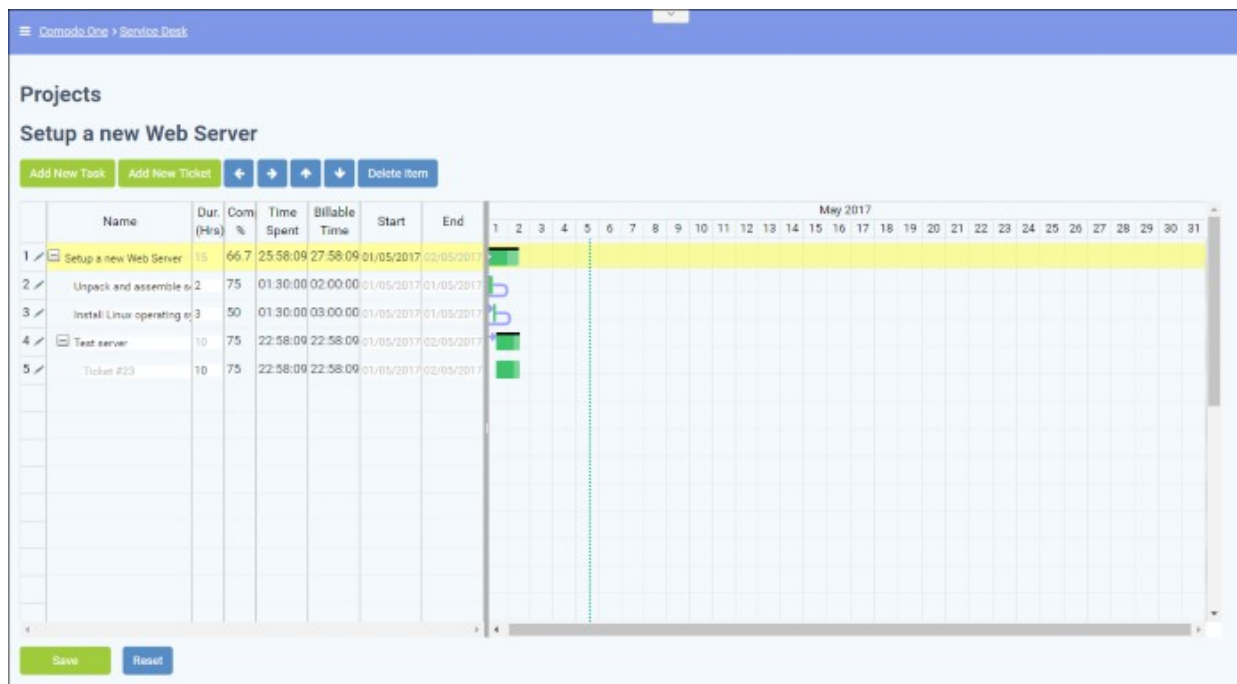
- To delete a task, sub-task, ticket or a sub-ticket, select the item and click 'Delete Item' at the top.
- Click 'Save' in the project viewer interface to save your changes.

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 Gantt chart.

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

Parent Level Task

Add/Edit Task
✕

Task name: *

Predecessor:

Time Spent: 25:58:09

Duration Hrs: 15

Completion %: 66.7

Billable Time: 27:58:09

Child Level or Terminal Task

Add/Edit Task
✕

Task name: *

Predecessor:

Time Spent: 01:30:00

Duration Hrs:

Completion %:

Billable Time:

- 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.

- 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 Gantt 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.

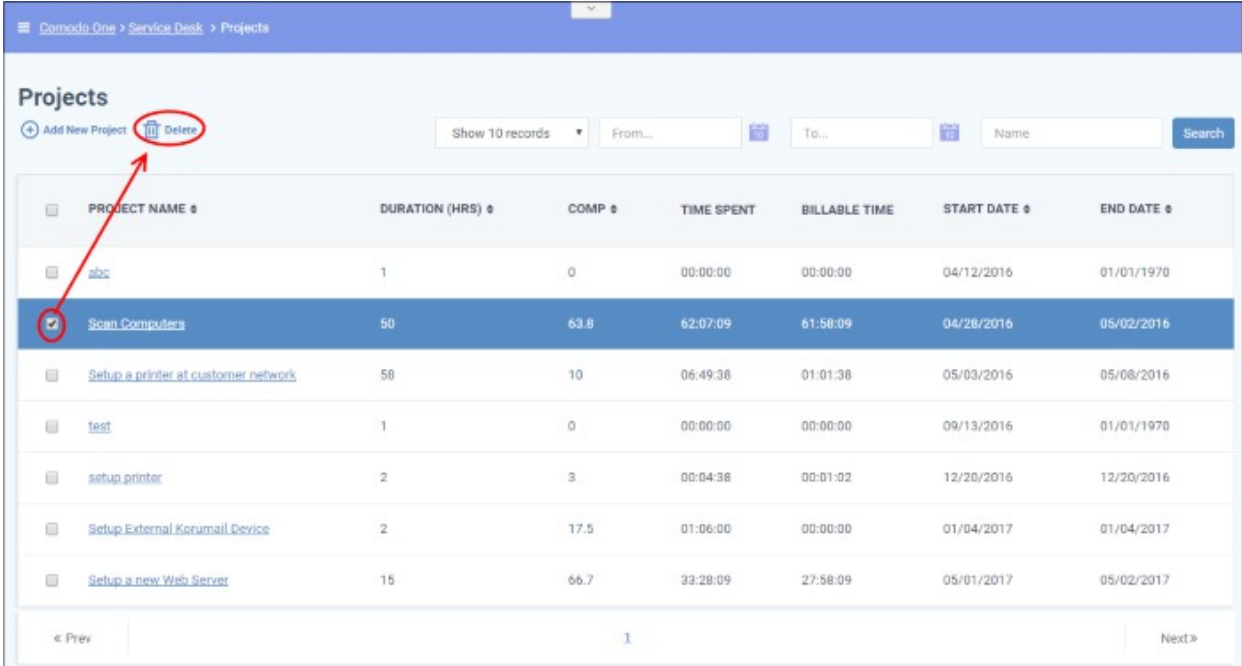
- Click 'Save' in the 'Projects' interface

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'



Comodo One > Service Desk > Projects

Projects

← Add New Project **Delete** Show 10 records From... To... Name Search

<input type="checkbox"/>	PROJECT NAME #	DURATION (HRS) #	COMP #	TIME SPENT	BILLABLE TIME	START DATE #	END DATE #
<input type="checkbox"/>	abc	1	0	00:00:00	00:00:00	04/12/2016	01/01/1970
<input checked="" type="checkbox"/>	Scan Computers	50	63.8	62:07:09	61:58:09	04/28/2016	05/02/2016
<input type="checkbox"/>	Setup a printer at customer network	50	10	06:49:38	01:01:38	05/03/2016	05/08/2016
<input type="checkbox"/>	test	1	0	00:00:00	00:00:00	09/13/2016	01/01/1970
<input type="checkbox"/>	setup printer	2	3	00:04:38	00:01:02	12/20/2016	12/20/2016
<input type="checkbox"/>	Setup External Korumail Device	2	17.5	01:06:00	00:00:00	01/04/2017	01/04/2017
<input type="checkbox"/>	Setup a new Web Server	15	66.7	33:28:09	27:58:09	05/01/2017	05/02/2017

< Prev 1 Next >

A confirmation dialog will appear.

Please Confirm

Are you sure you want to DELETE selected projects?

No, Cancel Yes, Do it!

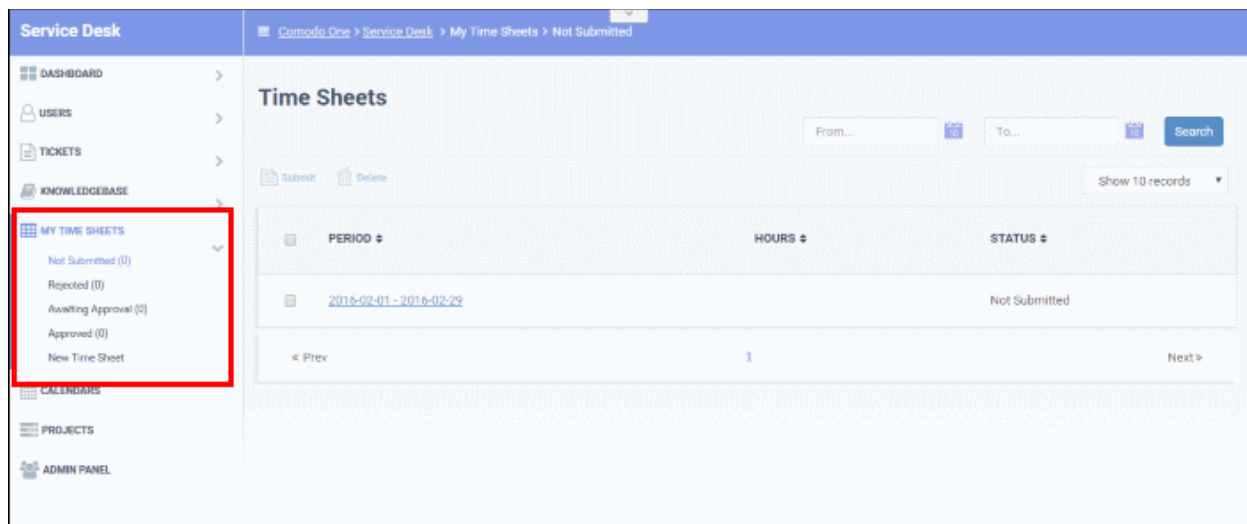
- Click 'Yes, Do it!' to remove the project

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](#)

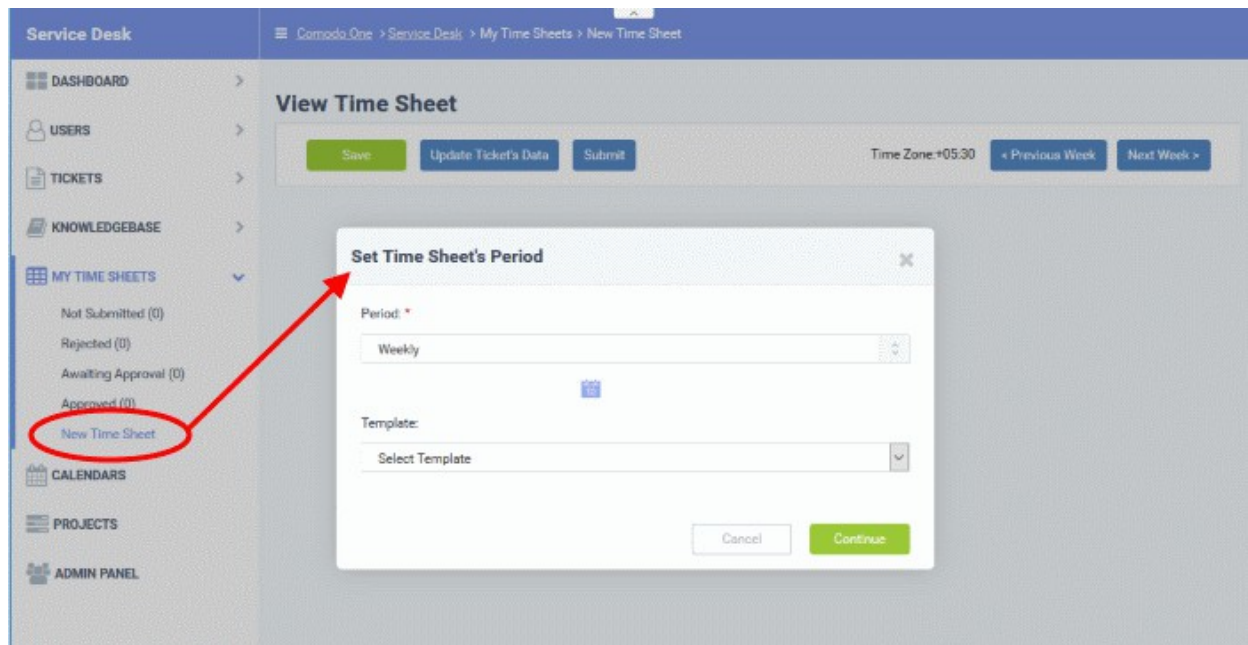
- **Updating a Time Sheet**
- **Submitting a Time Sheet for approval**
- **Deleting a Time Sheet**

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.

ACTIVITY	TIME	SUN 04/30	MON 05/01	TUE 05/02	WED 05/03	THU 05/04	FRI 05/05	SAT 05/06
Misc Add New Line								
Total								

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 screenshot shows the 'Time Sheets' management interface. At the top, there is a breadcrumb trail: 'Comodo One > Service Desk > My Time Sheets > Not Submitted'. Below this, the 'Time Sheets' title is followed by search filters for 'From...' and 'To...' dates, and a 'Search' button. There are also 'Submit' and 'Delete' icons, and a 'Show 10 records' dropdown. A table lists time sheet periods with columns for 'PERIOD', 'HOURS', and 'STATUS'. The second row, '2017-04-30 - 2017-05-06', is circled in red. Below the table are navigation buttons for 'Prev' and 'Next'. An arrow points from the circled period to the 'View Time Sheet' screen below.

The 'View Time Sheet' screen shows a header with 'Save', 'Update Ticket's Data', and 'Submit' buttons. It also displays 'Time Zone: +05:30', '< Previous Week', and 'Next Week >' buttons. A table shows activity details for the week of 04/30 to 05/06. The table has columns for 'ACTIVITY', 'TIME', and days of the week. The activity 'Server update' is listed with a time of 05:00:00 on Tuesday, 05/02. A 'Total' row shows 05:00:00 for the week.

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 the 'Update Ticket's Data' button.

This screenshot shows the 'View Time Sheet' screen with the 'Update Ticket's Data' button circled in red. A confirmation dialog box is overlaid on the screen. The dialog box has a title 'Please Confirm' and a close button (X). The text inside the dialog asks: 'Are you sure you want to RELOAD the time sheet with tickets?'. At the bottom of the dialog are two buttons: 'No, Cancel' and 'Yes, Do it!'.

- 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.

View Time Sheet

Save Update Ticket's Data Submit Time Zone: +05:30 < Previous Week Next Week >

ACTIVITY	TIME	SUN 04/30	MON 05/01	TUE 05/02	WED 05/03	THU 05/04	FRI 05/05	SAT 05/06
Ticket #22	01:33:38				01:33:38			
Misc Add New Line								
Server update	05:00:00			05:00:00				
Total	06:33:38			05:00:00	01:33:38			

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

Comodo One > Service Desk

View Time Sheet

Save Update Ticket's Data Submit

ACTIVITY	TIME	SUN 04/30	MON 05/01	TUE 05/02	WED 05/03	THU 05/04	FRI 05/05	SAT 05/06
Ticket #22	01:33:38							
Misc Add New Line								
Server update	05:00:00							
Total	06:33:38							

Time Sheet Entry

Activity:*
Activity Name

Sun 04/30
00:00:00

Mon 05/01
00:00:00

Tue 05/02
00:00:00

Wed 05/03
00:00:00

Thu 05/04
00:00:00

Fri 05/05
00:00:00

Sat 05/06
00:00:00

Cancel OK

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.

Activity:*
Windows OS update

Sun 04/30
00:00:00

Mon 05/01
07:00:00

Tue 05/02
05:00:00

CHOOSE TIME

Time 05:00:00

Hour
Minute
Second

Done

Fri 05/05
00:00:00

- 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.

View Time Sheet

Save Update Ticket's Data Submit Time Zone: +05:30 < Previous Week Next Week >

ACTIVITY	TIME	SUN 04/30	MON 05/01	TUE 05/02	WED 05/03	THU 05/04	FRI 05/05	SAT 05/06
Ticket #22	01:33:38				01:33:38			
Misc Add New Line								
Server update	05:00:00			05:00:00				
Windows OS update	18:00:00		07:00:00	05:00:00	06:00:00			
Total	24:33:38		07:00:00	10:00:00	07:33:38			

- 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

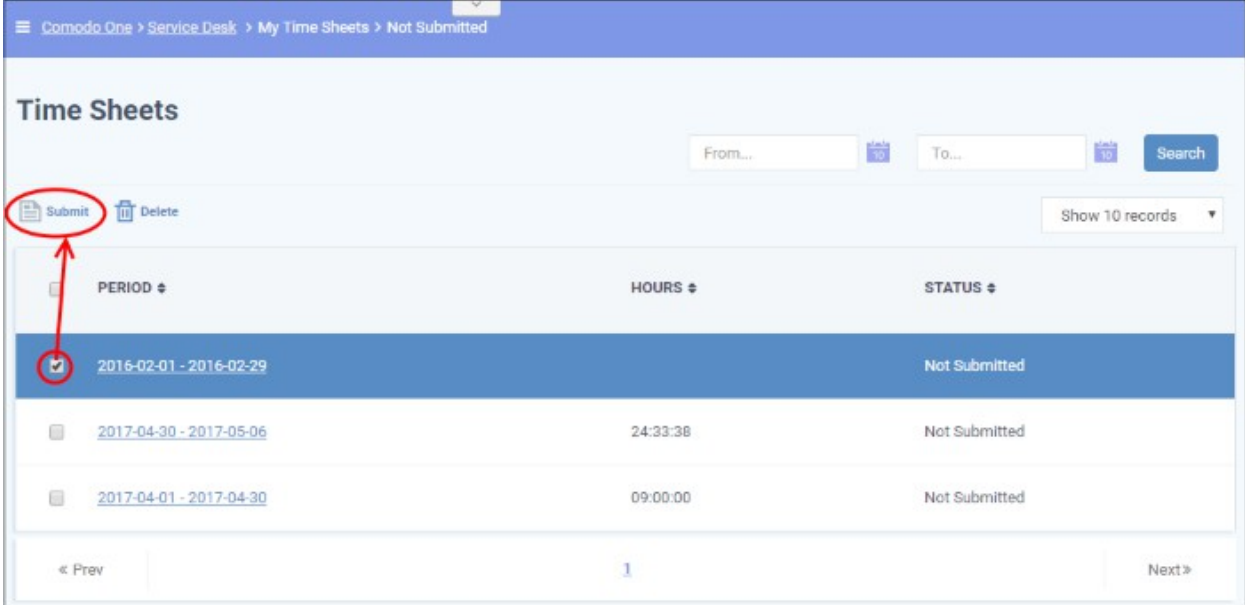
Submitting a Time Sheet for Approval

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'

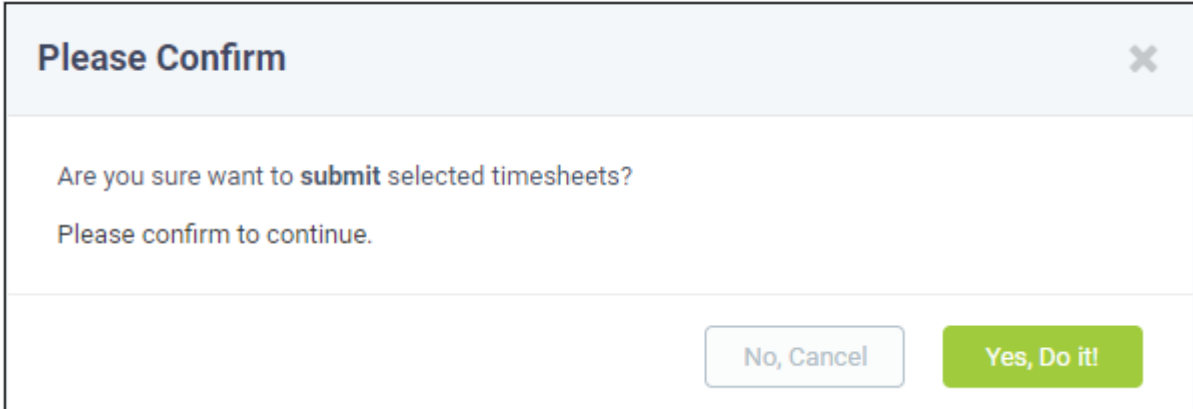


The screenshot shows the 'Time Sheets' interface. At the top, there is a breadcrumb trail: 'Comodo One > Service Desk > My Time Sheets > Not Submitted'. Below this, the title 'Time Sheets' is displayed. To the right of the title, there are search filters for 'From...' and 'To...' with calendar icons, and a 'Search' button. Below the filters, there are two buttons: 'Submit' (circled in red with an arrow pointing to it) and 'Delete'. To the right of these buttons is a dropdown menu labeled 'Show 10 records'. The main content is a table with three columns: 'PERIOD', 'HOURS', and 'STATUS'. The first row is highlighted in blue and has a checkmark in the 'PERIOD' column. The table contains the following data:

PERIOD	HOURS	STATUS
2016-02-01 - 2016-02-29		Not Submitted
2017-04-30 - 2017-05-06	24:33:38	Not Submitted
2017-04-01 - 2017-04-30	09:00:00	Not Submitted

At the bottom of the table, there are navigation controls: '< Prev', '1', and 'Next >'.

A confirmation dialog will appear.



The screenshot shows a confirmation dialog box with the title 'Please Confirm' and a close button (X) in the top right corner. The main text reads: 'Are you sure want to **submit** selected timesheets?' followed by 'Please confirm to continue.' At the bottom, there are two buttons: 'No, Cancel' and 'Yes, Do it!'.

- 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.

View Time Sheet

Save **Update Ticket's Data** Submit Time Zone:+05:30 < Previous Week Next Week >

ACTIVITY	TIME	SUN 04/30	MON 05/01	TUE 05/02	WED 05/03	THU 05/04	FRI 05/05	SAT 05/06
Ticket #22	01:33:38				01:33:38			
Misc Add New Line								
Server update	05:00:00			05:00:00				
Windows OS update	18:00:00		07:00:00	05:00:00	06:00:00			
Total	24:33:38		07:00:00	10:00:00	07:33:38			

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'

Time Sheets

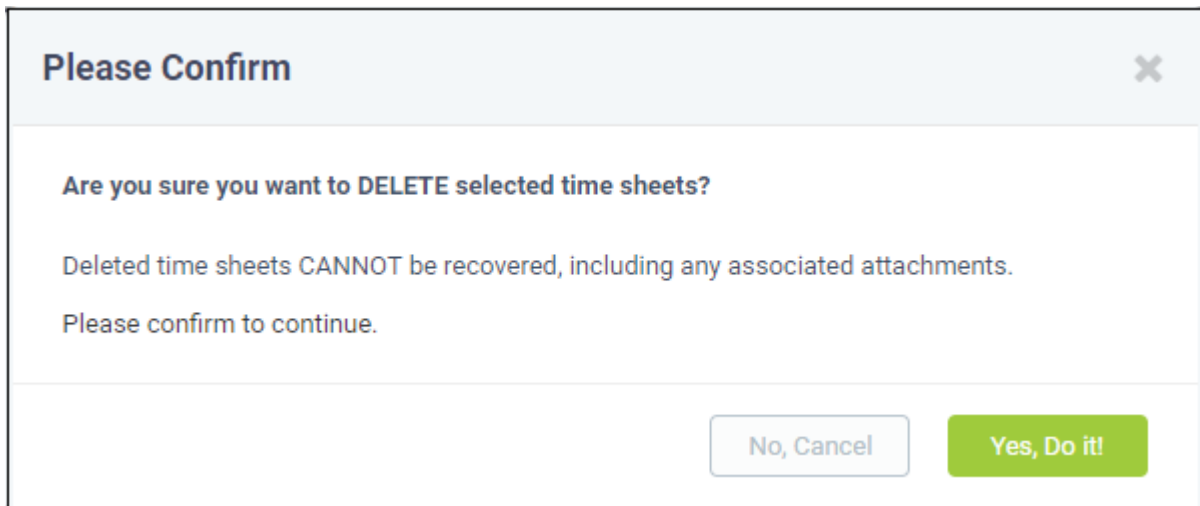
From... To... Search

Delete Show 10 records

PERIOD	HOURS	STATUS
<input checked="" type="checkbox"/> 2016-02-01 - 2016-02-29		Not Submitted
<input type="checkbox"/> 2017-04-30 - 2017-05-06	24:33:38	Not Submitted
<input type="checkbox"/> 2017-04-01 - 2017-04-30	09:00:00	Not Submitted

« Prev 1 Next »

A confirmation dialog will appear.



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

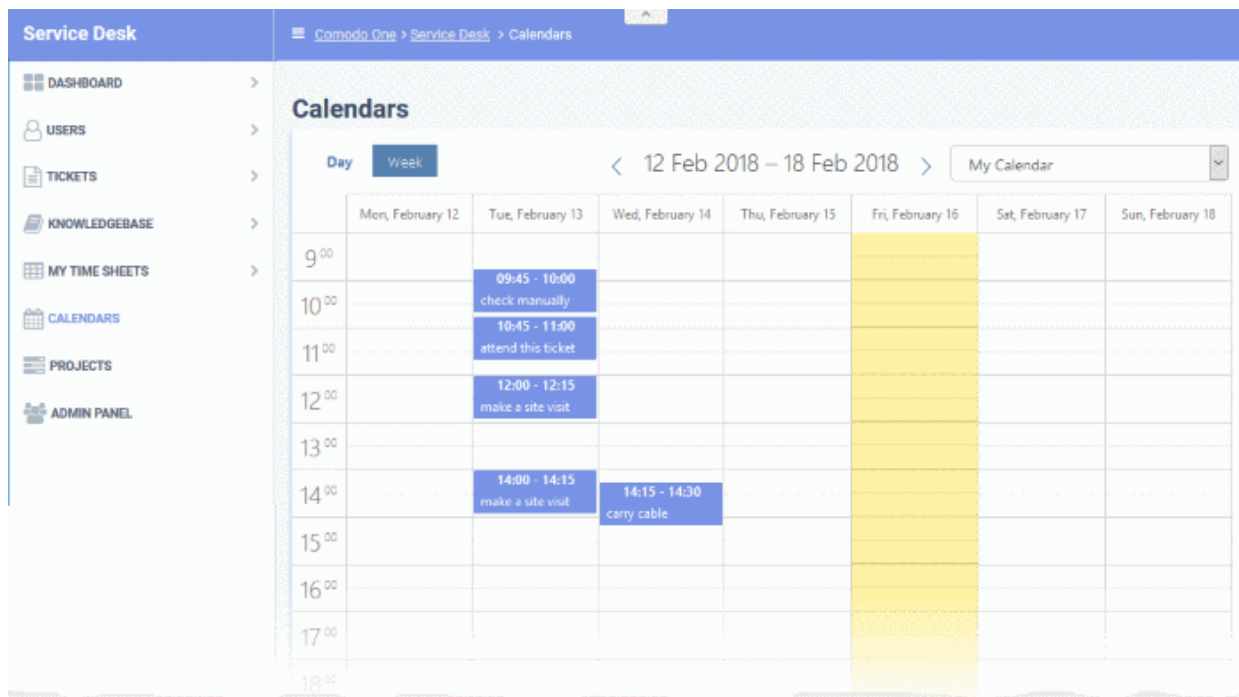
2.7 Manage Calendars

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.

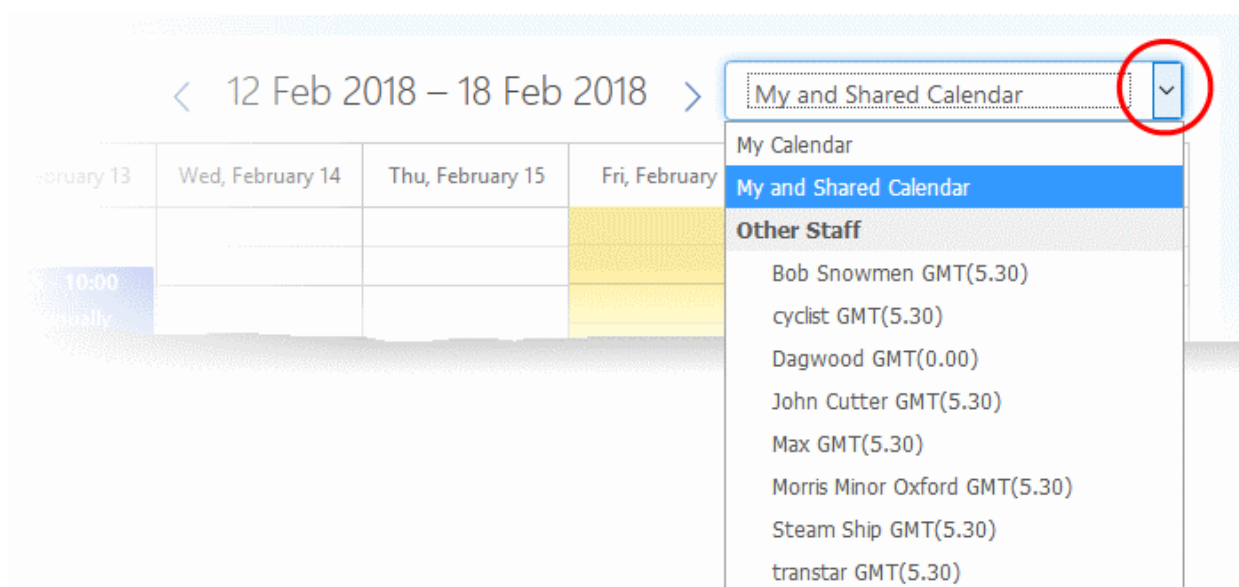


The following sections explain more about:

- [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

Day	Mon, February 12	Tue, February 13	Wed, February 14	Thu, February 15	Fri, February 16	Sat, February 17	Sun, February 18
9 ⁰⁰							
10 ⁰⁰		09:45 - 10:00 check manually				09:45 - 10:45 Meet Queen to	
11 ⁰⁰		10:45 - 11:00 attend this ticket					
12 ⁰⁰		12:00 - 12:15 make a site visit				12:15 - 12:30 meet sriini	
13 ⁰⁰							
14 ⁰⁰		14:00 - 14:15 make a site visit	14:15 - 14:30 carry cable				
15 ⁰⁰							
16 ⁰⁰							
17 ⁰⁰							

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

				15:45 - 16:00 Visit Elizabeth	

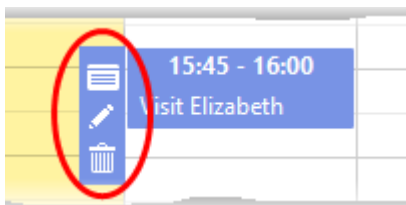
- Enter a short description of the task
- Click the tick mark to save the entry
- To share an event with others:
 - Click on the event
 - Click the 'Edit' icon that appears on the left (the top icon of the three)
 - Enable the 'Shared' check-box
 - Click 'Save'. See View Details and Manage a Calendar 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: <ul style="list-style-type: none"> • 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:

Appointment Edit ?

Description

Tickets

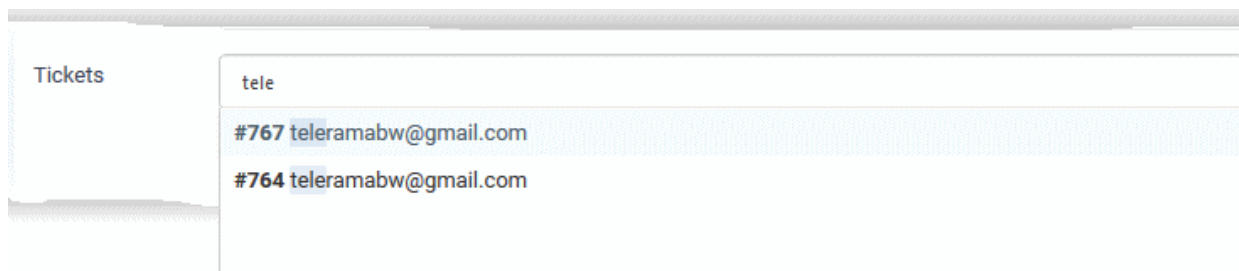
Shared

Full day -

- 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](https://www.comodo.com) or our [blog](#). You can also follow us on [Twitter](#) (@ComodoDesktop) or [LinkedIn](#).

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