COMODO
Creating Trust Online®

COMODO SERVICEDESK

Comodo One

Software Version 3.26

Service Desk Administrator Guide

Guide Version 4.16.113018

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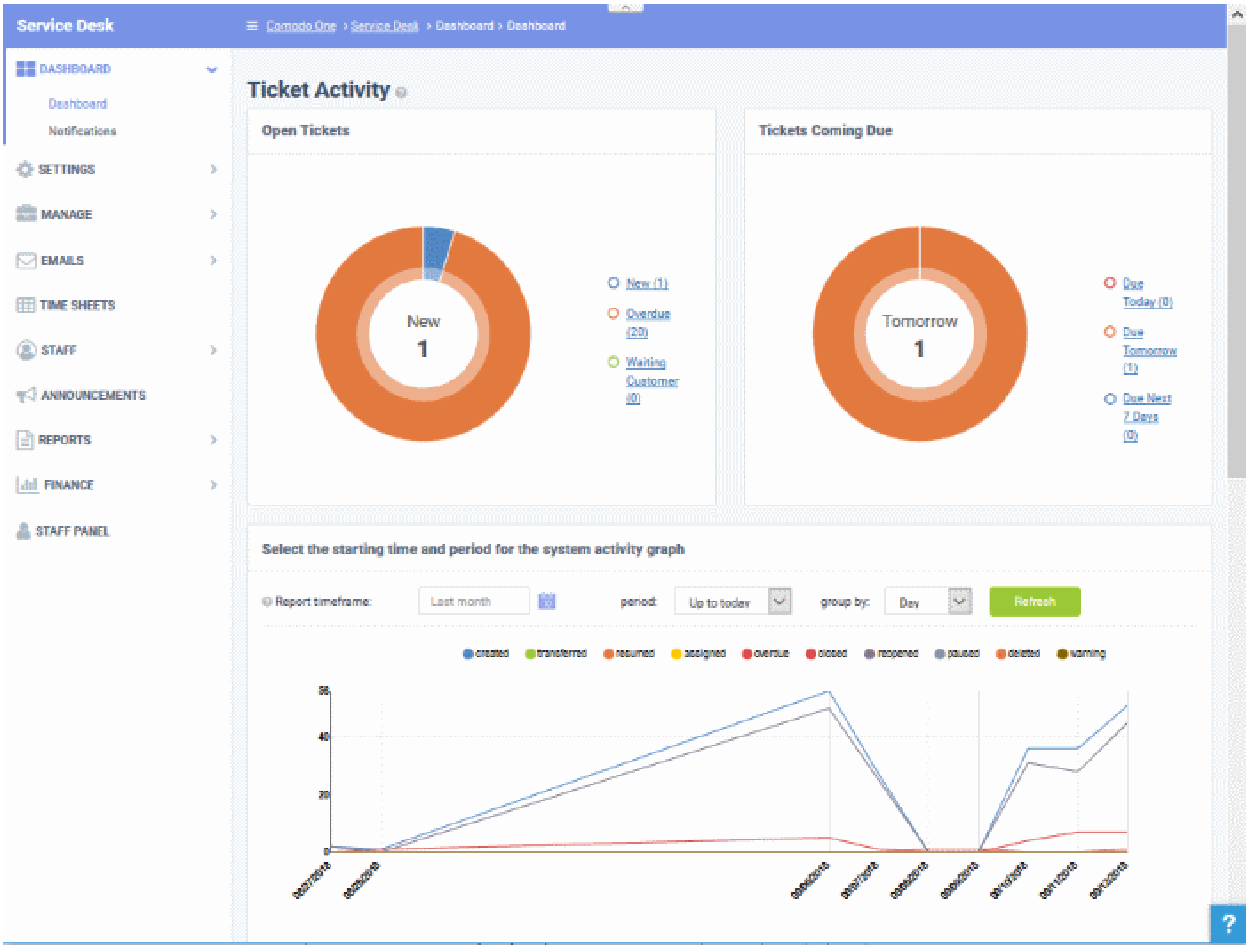
Introduction to Service Desk Module

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 platform allows admins and support staff to track and respond to tickets raised by users, reassign tickets, generate reports, create projects and more.

The interface has two management consoles - the 'Admin Panel' and the 'Staff Panel'. Admins with appropriate permissions can access both panels.

Admin Panel - Allows admins to manage tickets, users, organizations, knowledgebase content, notifications and to configure system settings. See **Service Desk Admin Panel** for more details.

Staff Panel - Allows support personnel and admins to manage tickets, generate reports, add new users, edit organizations, reassign tickets, manage projects and more. See **Service Desk Staff Panel** for more details.



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 an admin 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 are topics which a user selects when submitting a support ticket. The category they select will help your team to identify the area with which they need assistance. Ticket categories can used in custom forms to route tickets to a specific department.
- **Custom Forms and Fields** - Custom forms allow you to gather the precise data your support department needs from end-users in order to solve an issue. For example, a custom form that requests specific information can be assigned to a particular ticket category on your support home page.
- **Ticket Filters** - Create rules which ensure tickets matching certain criteria are assigned to specific departments/staff 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 admin/staff members as required. Internal logs are created to to keep track of ticket transfers.
- **Auto-Responder** - Configure automatic replies sent to user for new ticket creation. Personalize the auto-responders by inserting variables such as first name and more.
- **Knowledgebase** - Post solutions to frequently asked questions (FAQs) and create articles to solve problems. Knowledgebase items can be internal or publicly viewable and can help with ticket resolution times and can reduce the number of tickets submitted. Resolved tickets also can be posted in Knowledgebase and linked with ticket categories.
- **Projects** - Staff members can create Gannt charts to plan and track progress on company projects. Individual tasks and sub-tasks can be assigned completion percentages, time spent and billable time. Service desk tickets can also be bound to any task, meaning any updates in the ticket regarding completion, time-spent and billable time will be dynamically reflected in the parent task.
- **Time Sheets** - Time sheets allows administrators to evaluate the performance of the staff and track their working hours. 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'.
- **Contracts** - MSP administrators can create service contracts with customers as required. Contracts allow you to define weekly, bi-weekly, monthly or annual subscription fees for services and to offer 'pre-paid hours' that will be covered by the subscription. Admins can also create and apply charging plans with custom rates for different service types.
- **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.

1.1 Quick Start

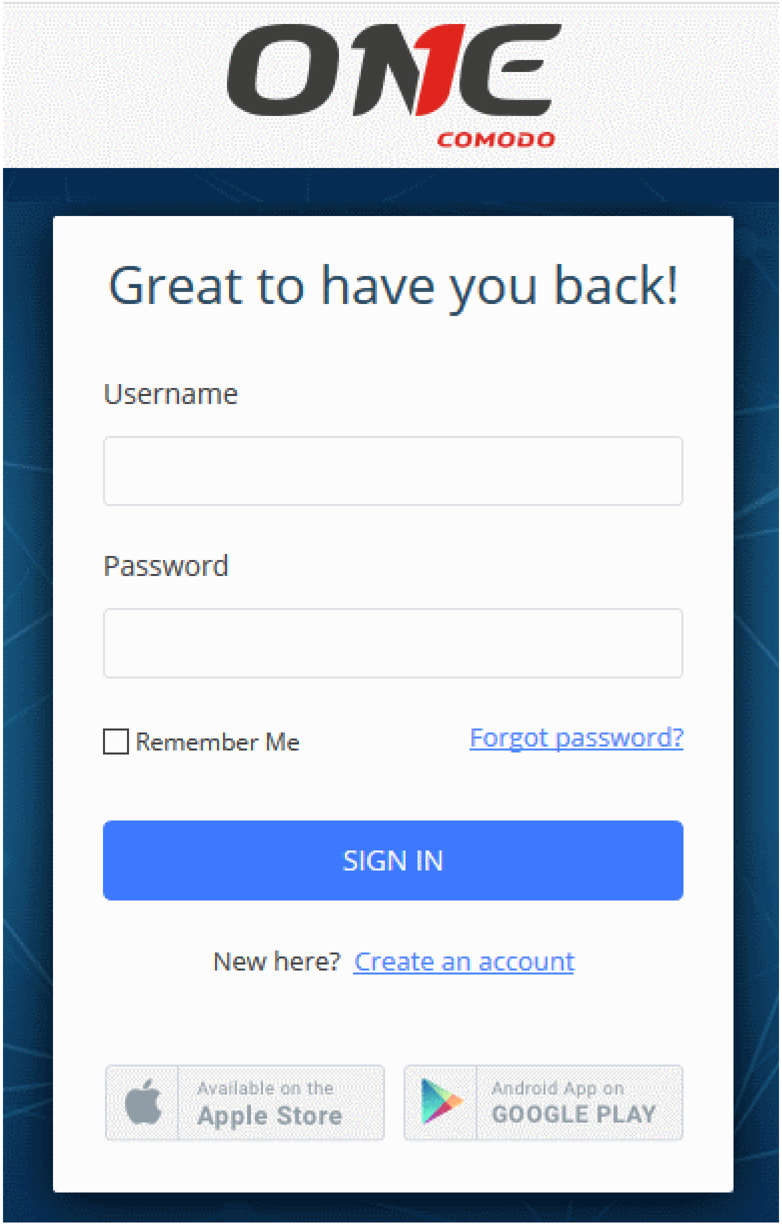
This tutorial explains how Comodo One administrators can configure Service Desk to manage their support ticketing infrastructure. The guide covers basic setup, user groups, staff, ticket routing, ticket categories, custom forms and the knowledge-base.

- Step 1 - Login to the Admin Console
- Step 2 - Create new user Roles (optional)
- Step 3 - Create new Departments (optional)
- Step 4 - Add new support staff
- Step 5 - Add Ticket Categories
- Step 6 - Enroll Users
- Step 7 - Assign Create New Organizations and assign Users to Organizations
- Step 8 - Create Service Contract for Organizations
- Step 9 - Manage Tickets
- Step 10 - Manage the Knowledgebase
- Step 11 - Access Control Settings
- Step 12 - Configure Auto-response Emails

- Step 13 - View Reports

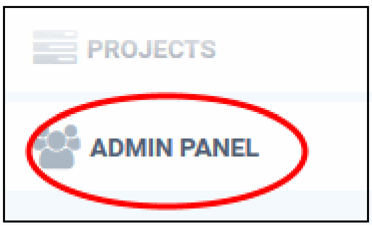
Step 1 - Login to the Admin Console

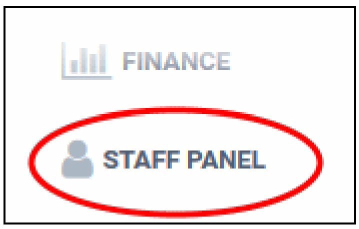
To access the Service Desk Module, login to C1 with your user name and password at **https://one.comodo.com/app/login**



- Once logged-in, click 'Licensed Applications' at the top then 'Service Desk'

By default, Service Desk will open at 'Staff Panel' > 'Open Tickets'. You can switch between the staff panel and the admin panel by clicking the link at the bottom of the left menu:





Admins can also setup two-factor authentication of users for additional login security. See **Setting up Two-Factor Login Authentication** in the C1 admin guide for help with this.

Step 2 - Create new user Roles (optional)

- Click 'Admin Panel' > 'Staff' > 'Roles'
- Roles determine the access rights of staff members and administrators in Service Desk.
- You can add new roles and change the role of a staff member at any time, so you may skip this step for now if required.
- However, before adding new support staff members, you may wish to create custom roles for them.

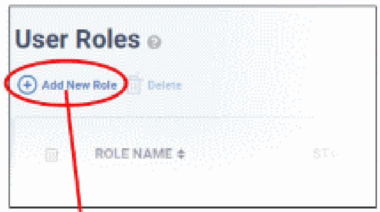
By default, service desk inherits three roles from Comodo One:

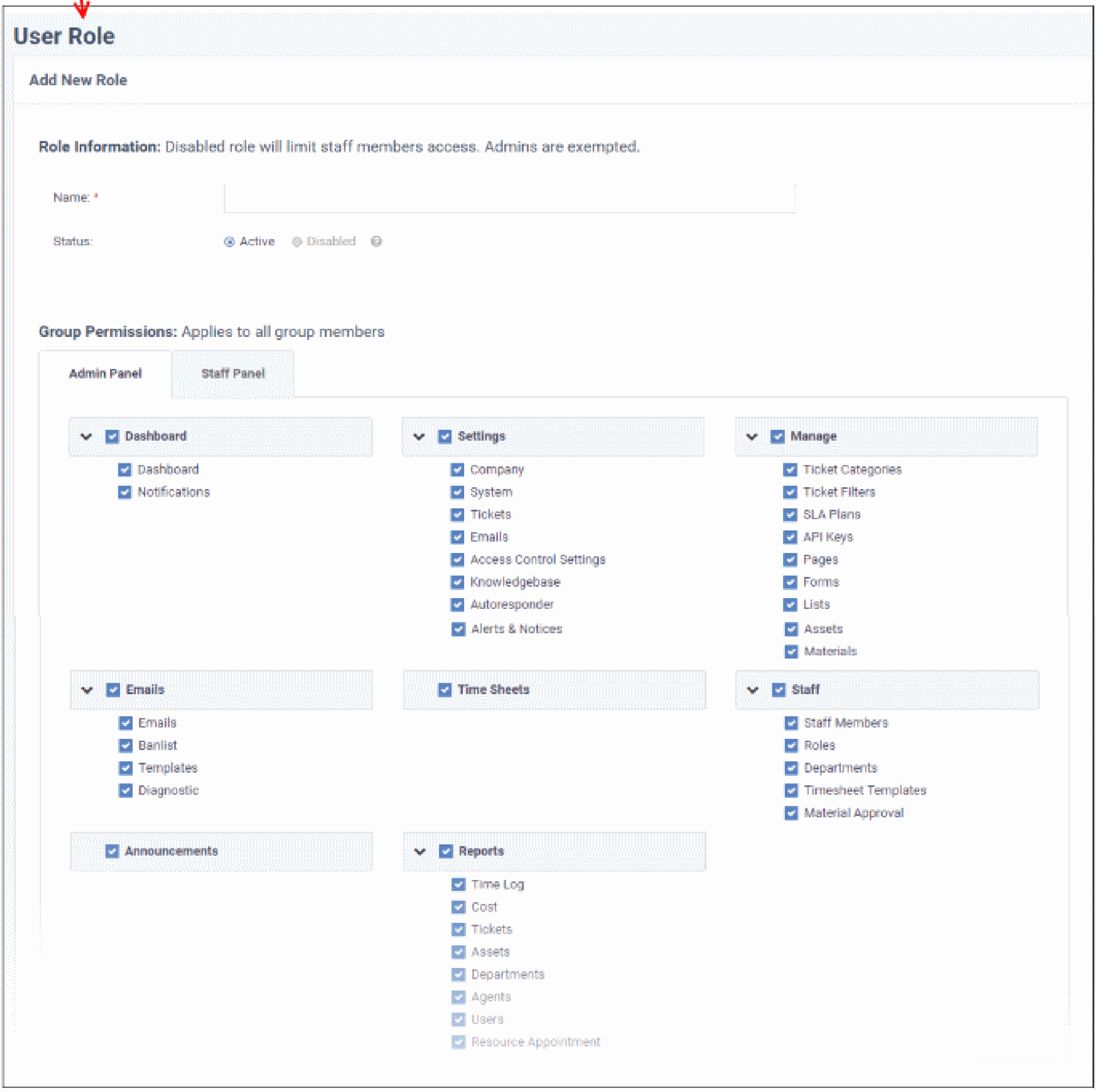
  - Account Administrator
  - Administrator
  - Technician

- Staff members added through C1 will be imported into Service Desk with the role assigned to them in C1. You can change this role as required.
- You can assign one of the default 'Administrator' or 'Technician' roles to your new Service Desk staff.
- You also have the option to create custom roles with modified permissions:

To create a new role

- Switch to the 'Admin Panel'.
- Click 'Staff' on the left then 'Role'.
- Click 'Add New Role' at the top.





- Enter the name for your new role and specify the permissions that should apply to its members in the 'Admin Panel' and 'Staff Panel' tabs.
- The 'Department Access' section allows you choose which departments can be accessed by members with this role.
- Add admin notes if required then click 'Create Role' to add your new role
- The new role will be listed in the 'User Role' interface and can be applied to new staff members at any time.

Step 3 - Create new Departments (optional)

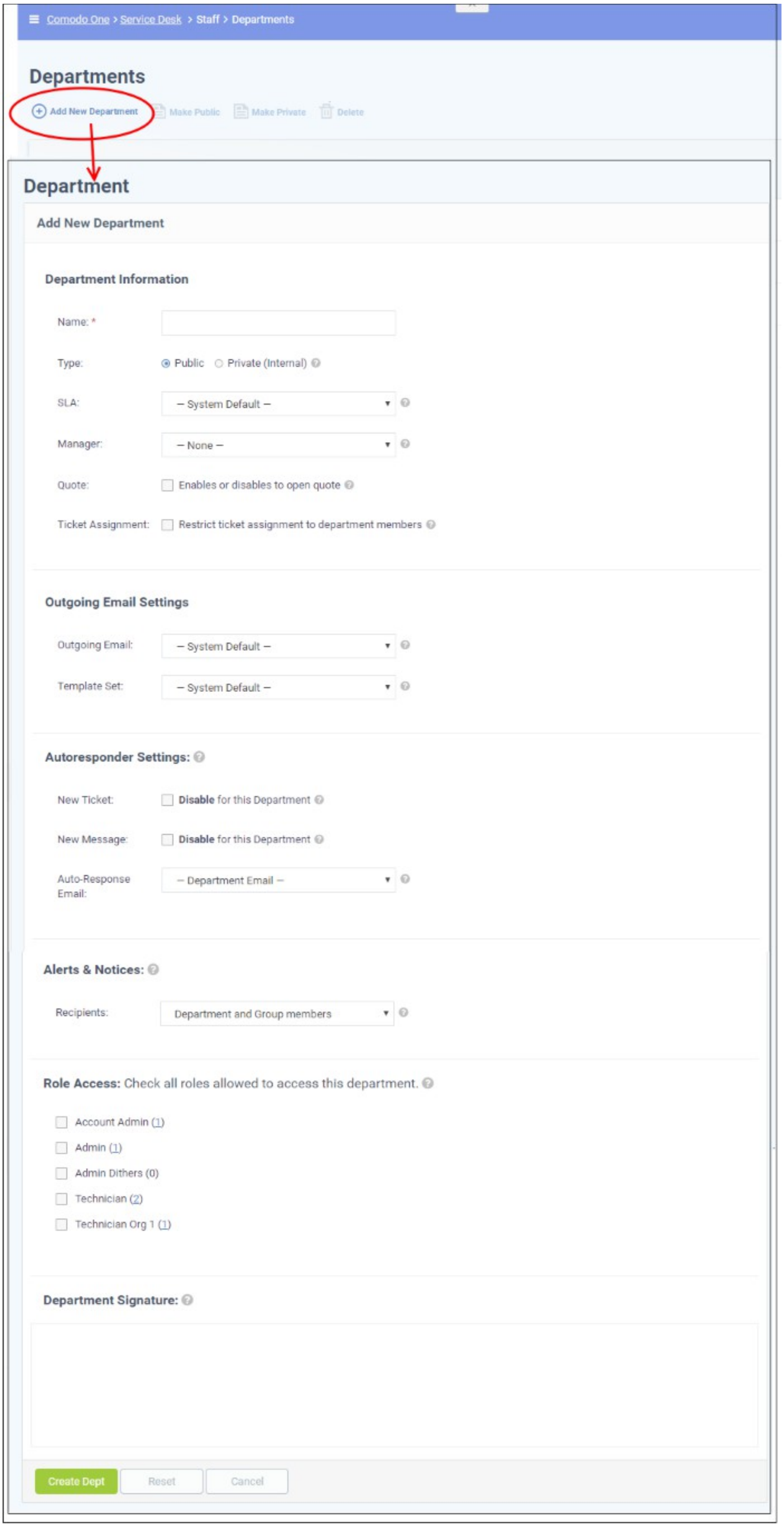
- Click 'Admin Panel' > 'Staff' > 'Departments
- Service Desk ships with three default departments:

- Maintenance
- Support (default)
- Sales

- All new staff are initially assigned to the default, 'Support' department. You can change the default department at anytime in 'System Settings & Preferences' ('Admin Panel' > 'Settings' > 'System')
    - Tickets will also be assigned to the default department if they are not already routed to a different department. Tickets can be re-routed by a ticket category, by incoming email settings, or by ticket filter settings. See '**Ticket Settings and Options**' for more details.
- You can create additional departments based on your requirements. For example, a department called 'Computer Maintenance' could be populated with staff who have the required skill set to deal with such tickets. **Ticket Categories** and **Ticket Filters** can be configured to route new tickets to staff members in the appropriate department.

To create new departments

- Click 'Admin Panel' > 'Staff' > 'Departments'.
- Click 'Add New Department' at the top:



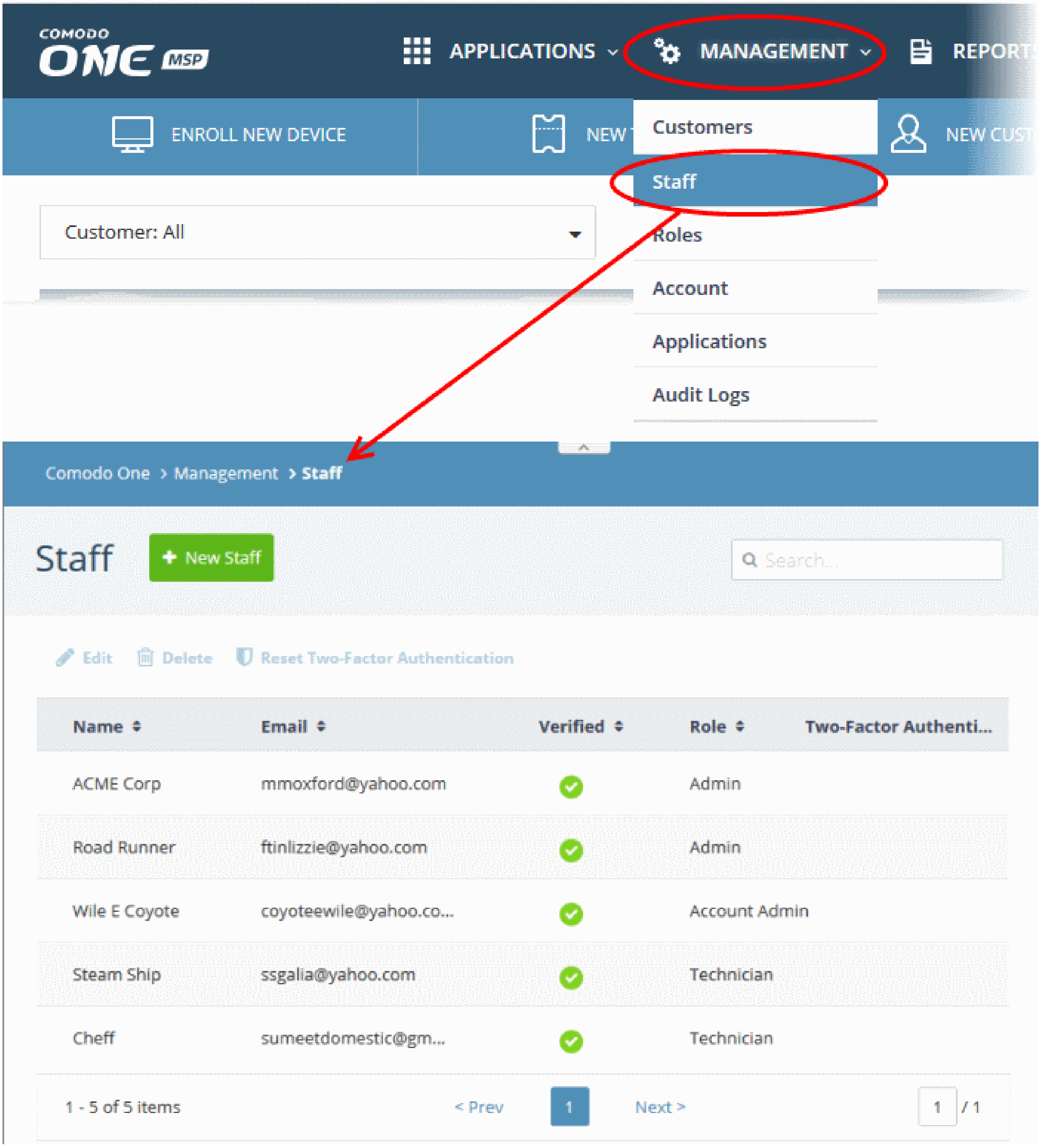
- Create a label for your new department. This is the minimum required to create a department to which staff can be assigned. You can accept the rest of the default settings and properly configure the department later if you wish.

- Select whether the department should be 'Public' or 'Private'. If 'Private' is selected, the name of the department will not be visible on the customer-facing web portal. It will only be visible to admins/staff members.
- Select the 'Service Level Agreements' for tickets assigned to this department. See '**SLA'** for more details. You can configure this later if required.
- Select the settings for outgoing emails. See '**Emails**' for more details.
- Configure auto-response emails to users whose tickets are assigned to this department. Refer to the section '**Autoresponder**' for more details.
- Select the recipients to whom alerts will be sent. See '**Alerts & Notices'** for more details.
- In the 'Role Access' section, select members of other roles who can access tickets assigned to the department.

Step 4 - Add new support staff

The next step is to add new staff members. Staff are the personnel who will respond to support tickets from end-users.

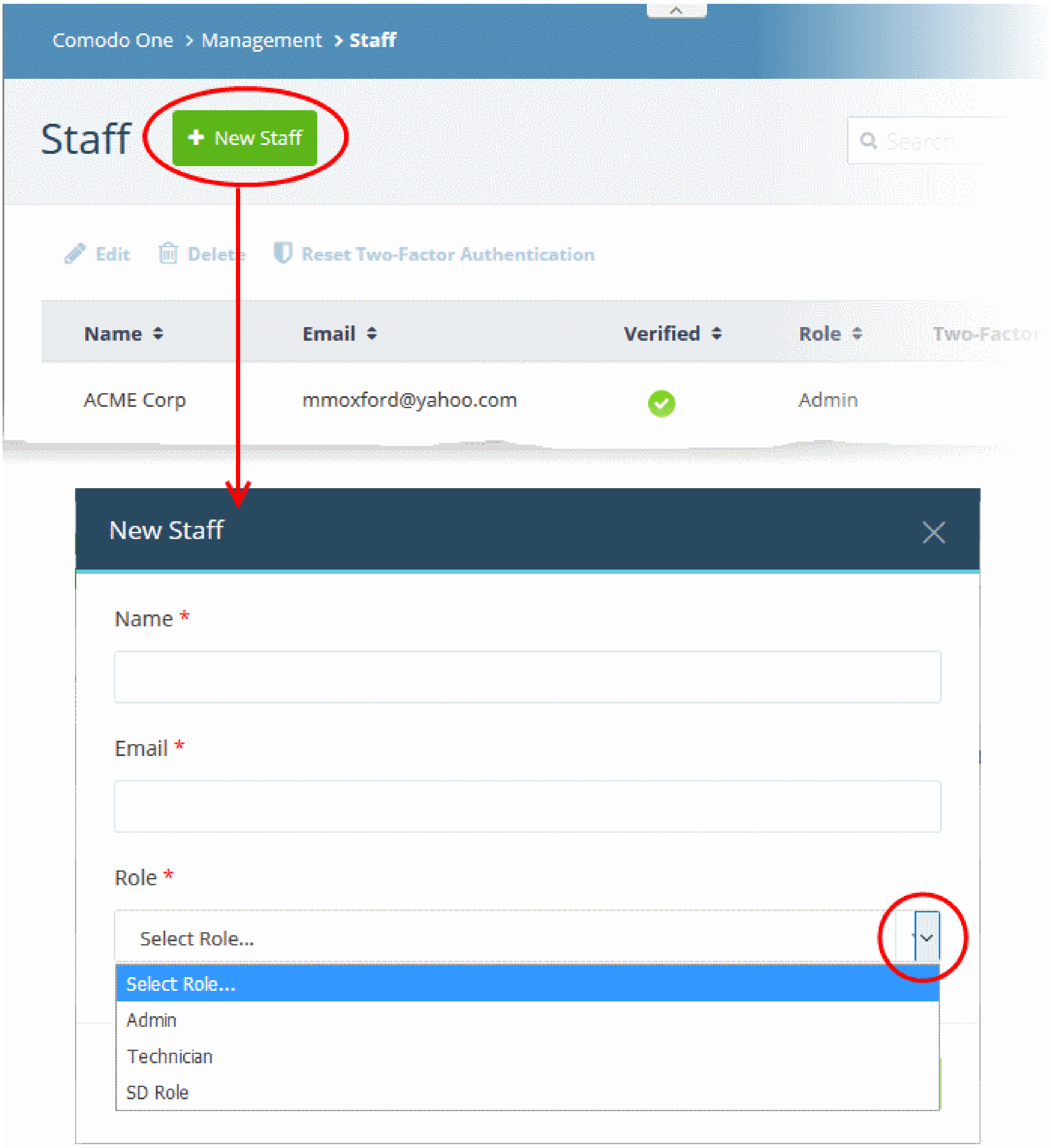
- You can add staff in the Comodo One (C1) portal at **https://one.comodo.com/app/login**:
    - Click 'Management' > 'Staff' > '+ New Staff' in the Comodo One interface.
    - Staff created in C1 will become available in Service Desk and all other C1 products (ITSM, Quote Manager etc).
- Staff created in C1 will be assigned to the 'default department' in Service Desk. You can assign staff to different departments as required.
- There are two types of roles – Service Desk roles and Comodo One roles.
    - Staff will initially be given the same role in Service Desk as they have in C1.
    - You can change this role in Service Desk at any time.
    - The role you assign to them in Service Desk will not affect their role in C1.
- Click 'Management' > 'Staff' > '+ New Staff' in the Comodo One interface to get started:



Staff List - Table of Column Descriptions	
Column Header	**Description**
Name	The name of the administrator or staff member
Email	The email address of the administrator or staff member
Verified	Whether or not the staff member has confirmed their email address by clicking the link in the verification email. Admins and staff can only login to C1 after verifying their email address and creating a password.
Role	Click 'Management' > 'Roles' to add,view and edit roles and role permissions.
Two-Factor	Two factor authentication provides additional security by requiring staff to provide a unique

Authentication	code in addition to username and password when logging in. See **Setting up Two-Factor Login Authentication** in the C1 admin guide for help with this.

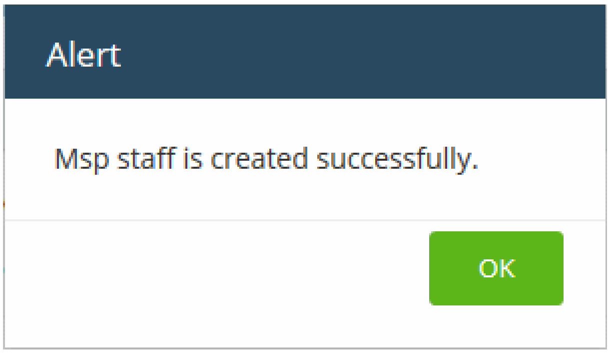
- Click 'New Staff' at the top.



Note: Staff with 'Admin' privileges can only be added by the account administrator.

  - **Name** - First and last name admin/staff member.
  - **Email** - The email address of the admin/staff member. The verification email for the admin/staff to activate their account will be sent to this email address.
  - **Role** - Select the role of the admin/ staff from the drop down. You can always change this later if required.
- Click the 'Save' button.

A confirmation dialog will be displayed.

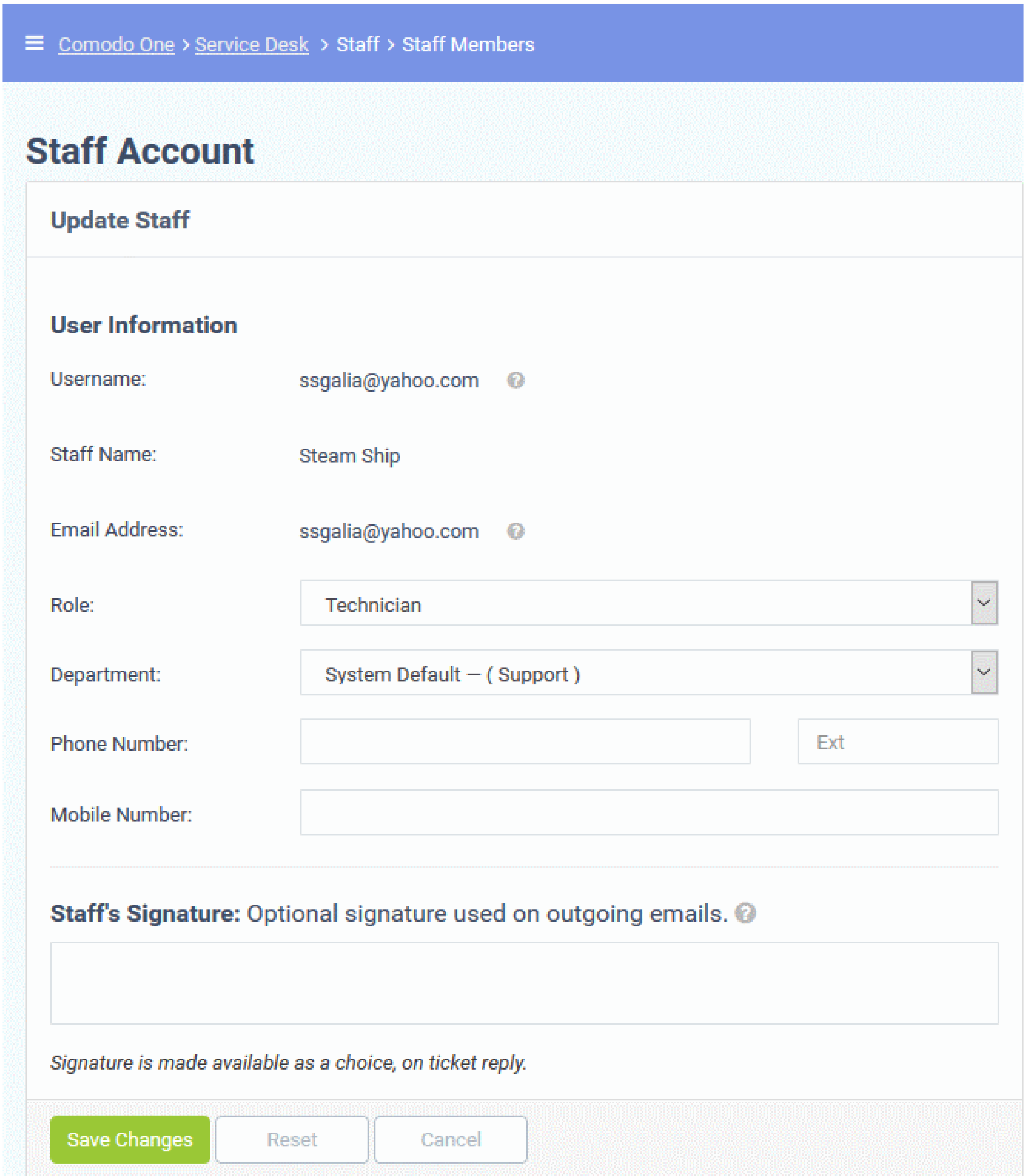


- Click 'OK'

A confirmation mail containing an account verification link will be sent to the user. After clicking the link, the recipient will be asked to set a unique password to login to Service Desk.

To change the role and department for a staff member

- Open the 'Admin panel' in Service Desk (see last link on the left)
- Click 'Staff' on the left then choose 'Staff Members'
- Click the name of the staff member.



The 'Update Staff' screen allows you to edit staff details:

- **Role** - Service Desk role, as inherited from Comodo One.
  - Select a new role if required from the drop-down.
  - Click 'Admin Panel' > 'Staff' > 'Roles' to view and configure roles.
- **Department** - The department to which the staff member belongs.
  - Staff members are initially added to the department set as 'System Default' in Service Desk.
  - Select a new department for the staff member if required.
  - Click 'Admin Panel' > 'Staff' > 'Departments' to view, add and edit departments.

- Click 'Save Changes' to update the staff member details.

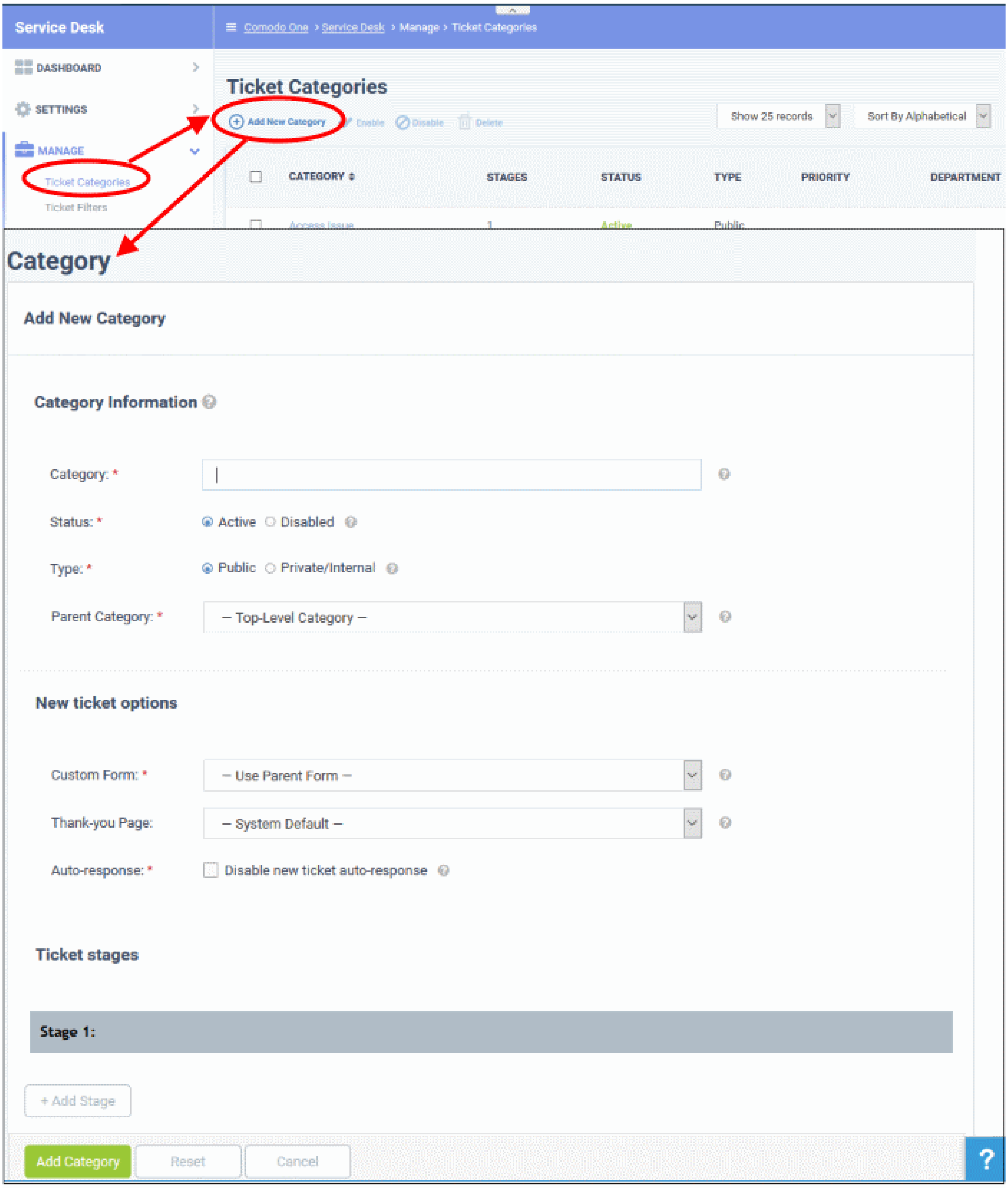
Step 5 - Add Ticket Categories

'Ticket Categories' are help topics that are presented to end-users to help them more easily select the area with which they need assistance. For example, your help page might have a menu which says 'Please select the area we can help you with', and offer categories such as 'Billing', 'Account Changes', 'Technical Support' and so forth. When combined with custom forms, ticket categories can route tickets to specific departments and can be used to gather better, more targeted information from end-users.

Ticket Categories can also be given multiple 'stages', allowing you to set up a 'step-by-step' process for dealing with requests on a particular category. Each stage allows admins to define the department, priority, SLA and assigned person, helping you to route and prioritize the ticket at various phases of its life-cycle.

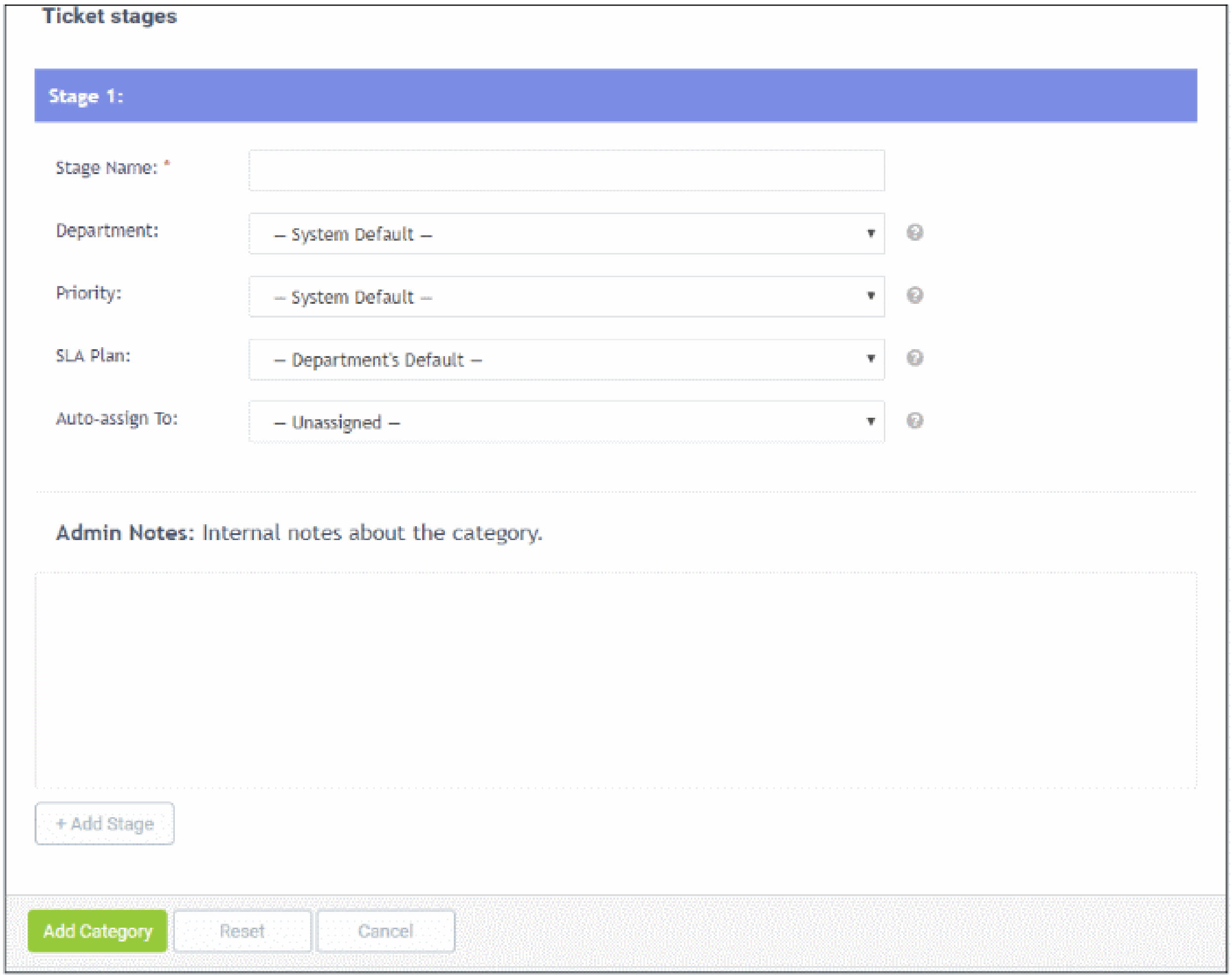
To add a new ticket category

- In the 'Admin Panel', click 'Manage' > 'Ticket Categories' then 'Add New Category' in the 'Ticket Categories' screen



The 'Add New Category' screen will appear.

- Under 'Category Information', enter a name for the category in the first field and select the required parameters from the options.
    - **Status**: Select whether the ticket category should be active or not
    - **Type**:
        - **Public** - The category will be available on your customer facing support portal.
        - **Private/Internal** - The category will be available in the staff panel for admins and staff.
    - **Parent Category:** Select the parent ticket category for this category if required, from the options.
- Under 'New ticket options' select the form that should be presented to the user, the Thank you page that should be displayed and the response mail that should be sent.
    - **Custom Form**: The form which the user will complete if they select this ticket category. Custom forms can be tailored to gather specific information from a customer when they request help on a certain ticket category. You can create and manage forms with custom fields from the 'Admin Panel' > 'Manage' > 'Forms' interface. For more details on managing forms,see **Forms**. The 'Custom Form' drop-down allows you to choose the custom form to be applied to the ticket category.
    - **Thank-You Page**: The page shown to users after submitting a ticket to confirm the ticket has been received. You can choose different thank-you pages for different ticket categories. The thank-you page will be displayed for guest users only. See **Client Portal Pages** for more details about creating client portal pages.
    - **Auto-response**: Choose whether or not an auto-response emails should be sent to the user for the ticket activities.
        - For more details on managing templates for auto-response mails, see **Email Templates**.
        - For more details on granular configuration of auto-response settings at global level, see **Autoresponder Settings**.
        - For more details on granular configuration of auto-response settings at department level, see **Departments**.
- Under 'Ticket Stages', configure the department to which the tickets with this ticket category should be routed, SLA plan to be applied and the staff to whom the ticket is to be assigned at successive stages of its life-cycle.
    - Click 'Stage 1' and choose the options from the respective drop-downs.



    - To add more stages to the ticket category, click 'Add Stage' and repeat the process.
- Click the 'Add Category' button when done.

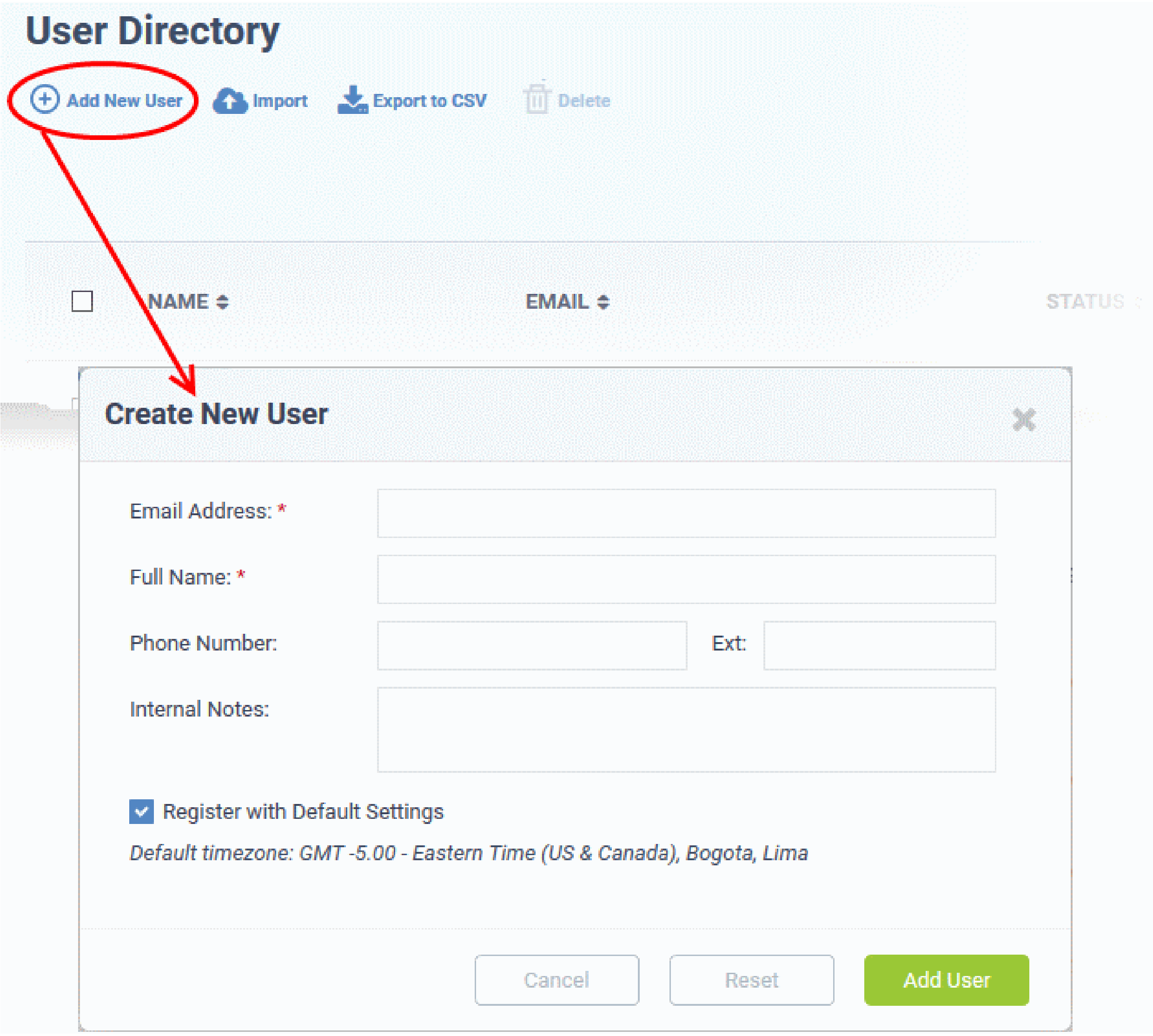
The ticket category will be visible in the web portal if it is 'Public' and users can select it at the time of ticket creation. Ticket categories that are 'Private' are visible to admins/staff members only. See '**Ticket Categories**' for more details.

Step 6 - Enroll Users

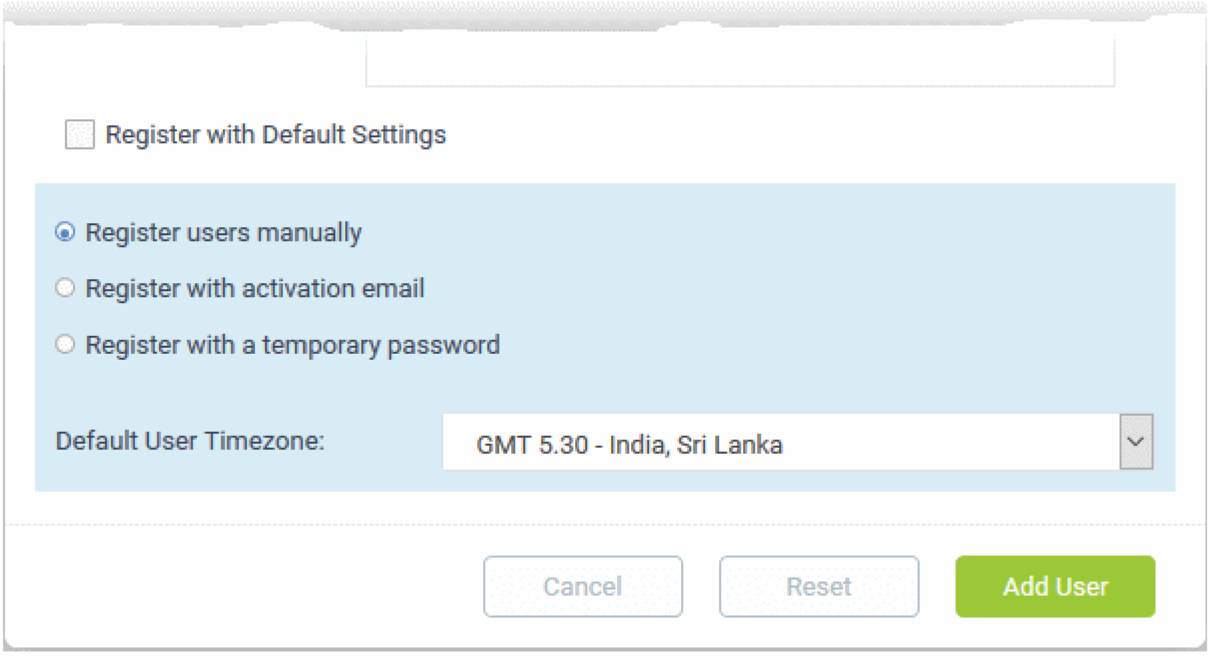
- Click > 'Staff Panel' > 'Users' > 'User Directory'
- New users can self-enroll then submit tickets at your customer facing client portal
    - Your client portal URL has the format https://***company-name***.servicedesk.comodo.com.
    - Users that self-enroll will be sent an account activation mail
- 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 7**.
- You can set the default registration method for manually enrolled users in 'Admin Panel' > 'Settings' > 'Users'. See **User Registration Settings** for more details.

To enroll new users

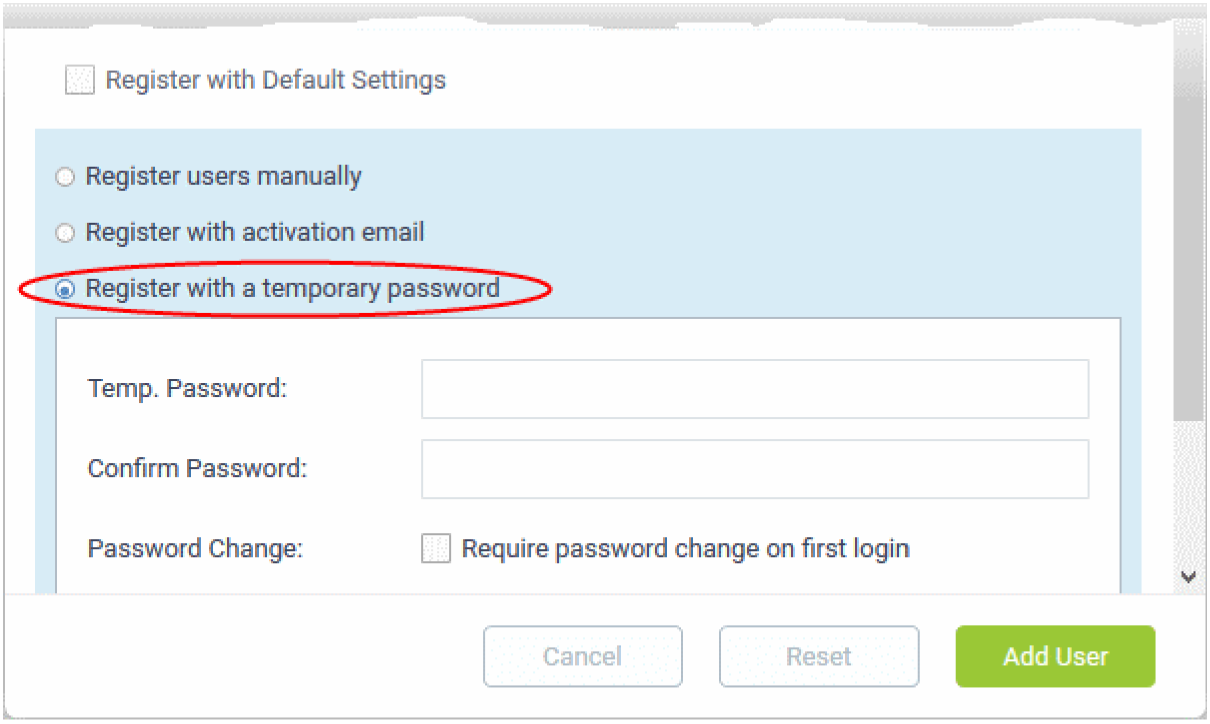
- Open the 'Staff Panel' if it isn't open already (last link in the left-hand menu)
- Click 'Users' then select 'User Directory'
- Click the 'Add New User' link at the top



- **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** if you need more help with this.



- **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)



- 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.

- **Default User Timezone -** Select the time zone to which the user belongs from the drop-down

- 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 7 - Create New Organizations and assign Users to 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 the 'User Directory' interface.

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 available for selection in all integrated modules (Service Desk, ITSM and Dome Shield).

  To create a company in C1, click 'Management' > 'Customer' > 'New Customer'
- **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.

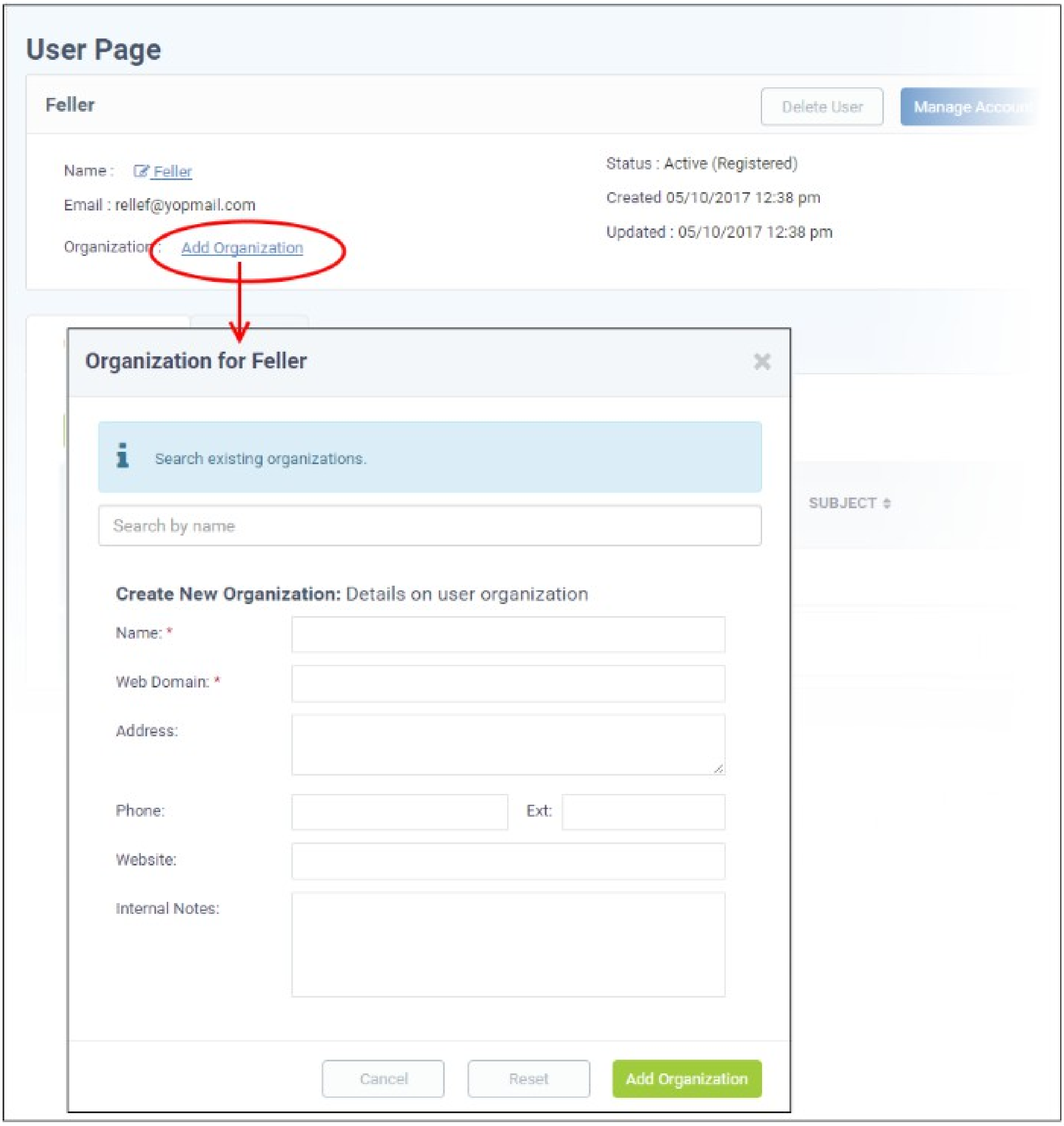
To assign users to an organization

- In the 'Staff Panel', click 'Users' then 'User Directory'

The list of users will be displayed.

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

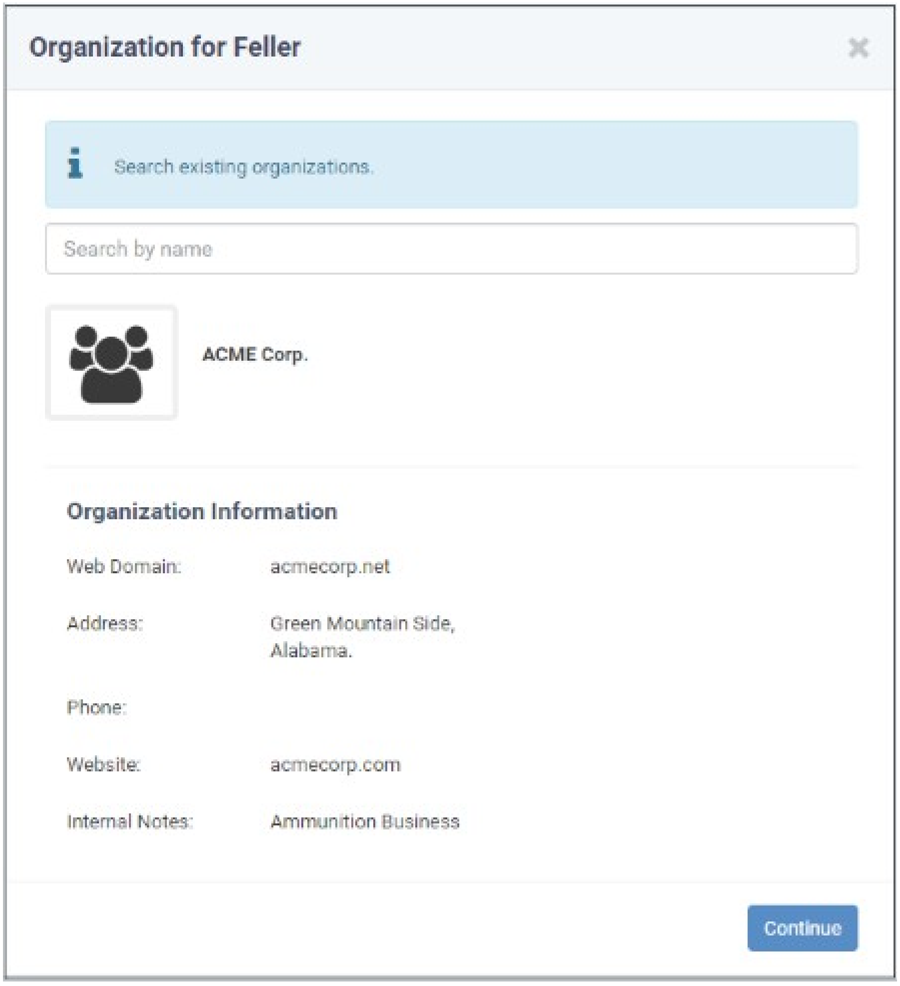
In the user details interface, click the link 'Add Organization'



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.

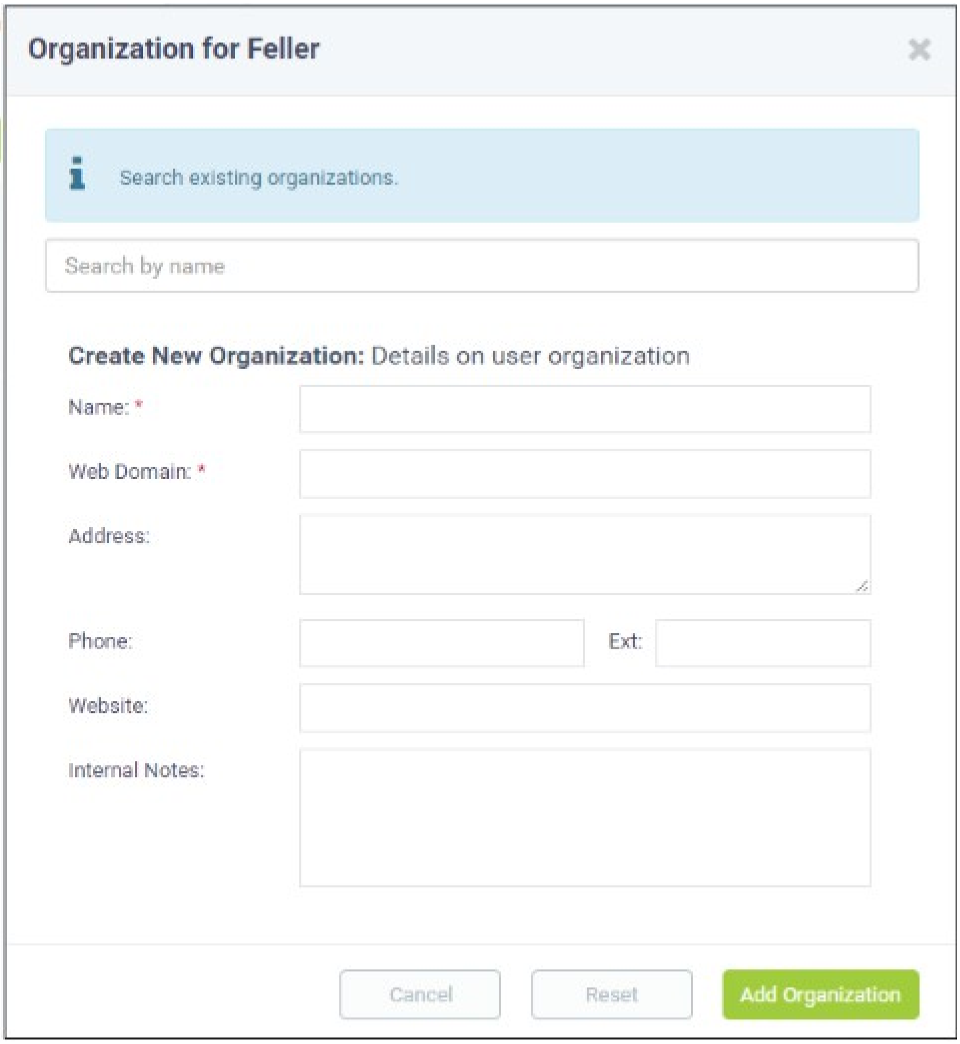
- To add the user to an existing Organization, type the first few letters of the Organization name in the search field. After choosing an Organization, following confirmation dialog will appear:



- 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'.



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.

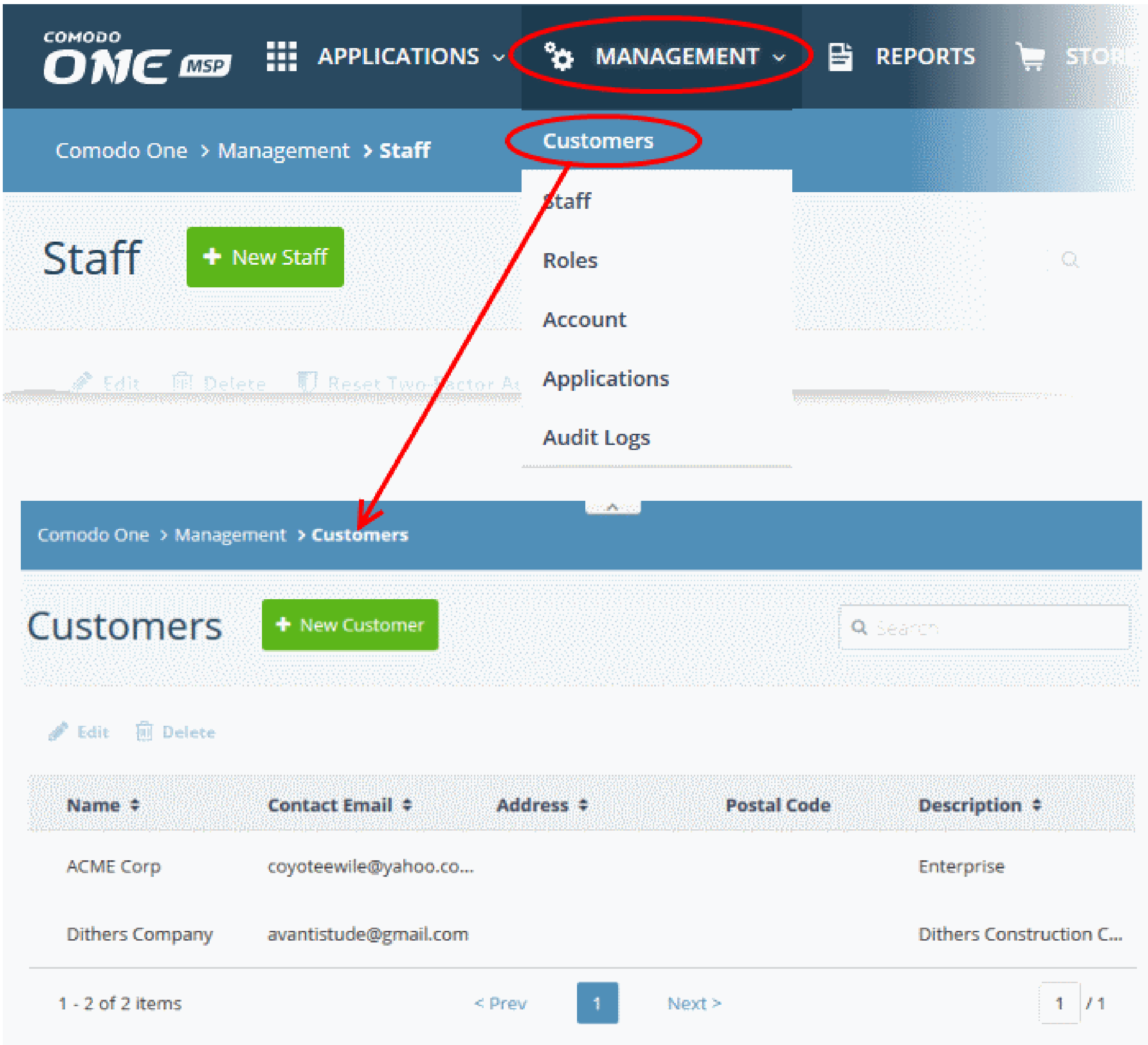
To add a new organization

- **Add organization from the C1 interface**
- **Add organization from Service Desk**

To add an organization from the C1 interface

Note: The feature for adding and managing companies is available for C1 account that is registered as Managed Service Provider (MSP) as business type. C1 Enterprise account administrators can add organizations from the SD interface.

- Log in at **https://one.comodo.com/app/login**.
- Click 'Management' then 'Customer' from the drop-down option



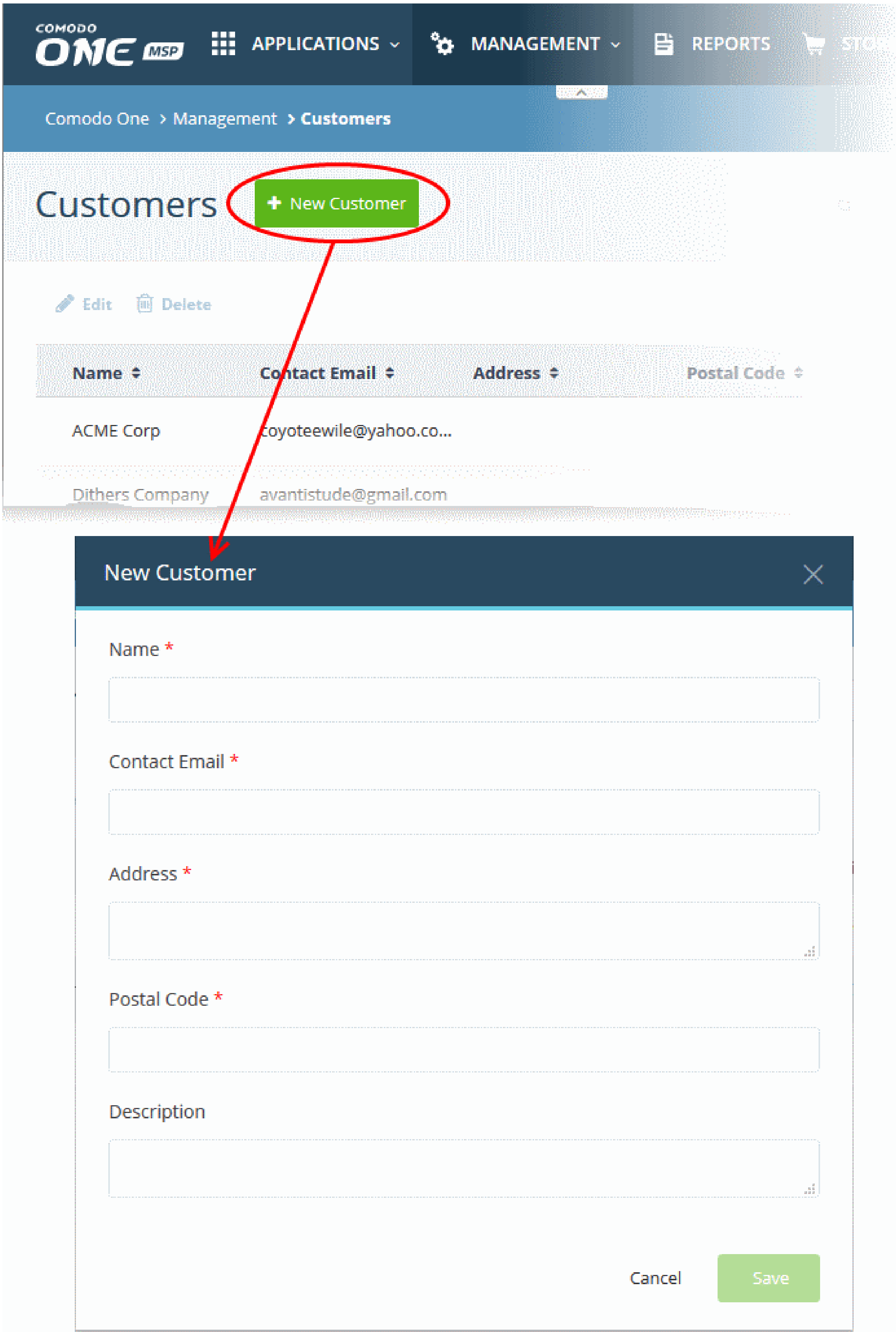
The Customer interface displays the list of customer organizations added to Comodo One.

Company List - Table of Column Descriptions	
Column Header	**Description**
Name	The name of the company
Contact Email	Email address of the contact person of the organization.
Address	The address of the organization
Postal Code	The area postal code of the organization
Description	A short description of the organization

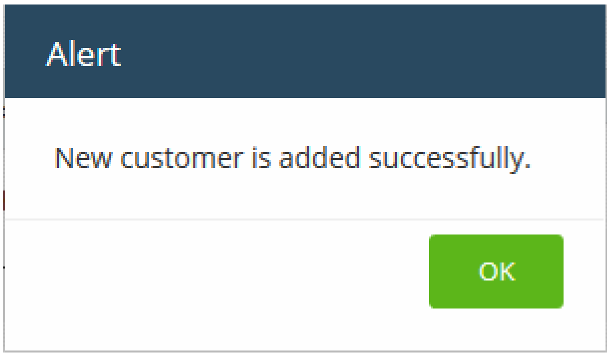
To add an organization

- Click the 'New Customer' button from the 'Customer' interface

The 'New Customer' form will be displayed.



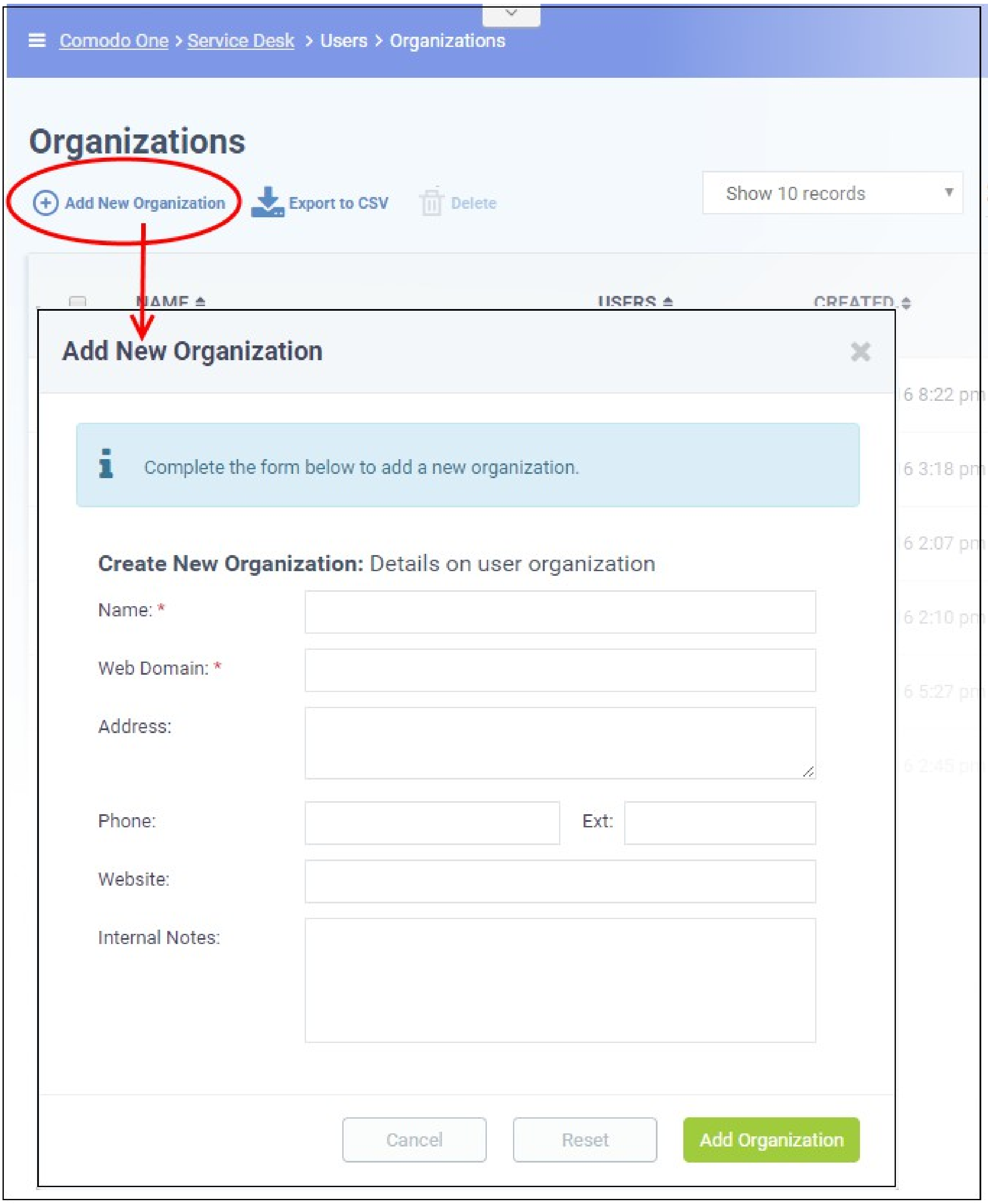
- Fill the details in the respective fields.
- Click the 'Save' button.



- Click 'OK' in the confirmation dialog.

To add an organization from Service Desk

- From the Staff panel, click 'Users' then 'Organizations'
- Click 'Add New Organization' at the top



The 'Add New Organization' screen will appear:

- **Name**: Enter the name of the new 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 to add the organization to Service Desk. Staff members can now configure its settings, users and billing rates. See '**Managing Organizations**' for more details.

Step 8 - 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 company will reference the rates specified in the contract.

Contracts can include:

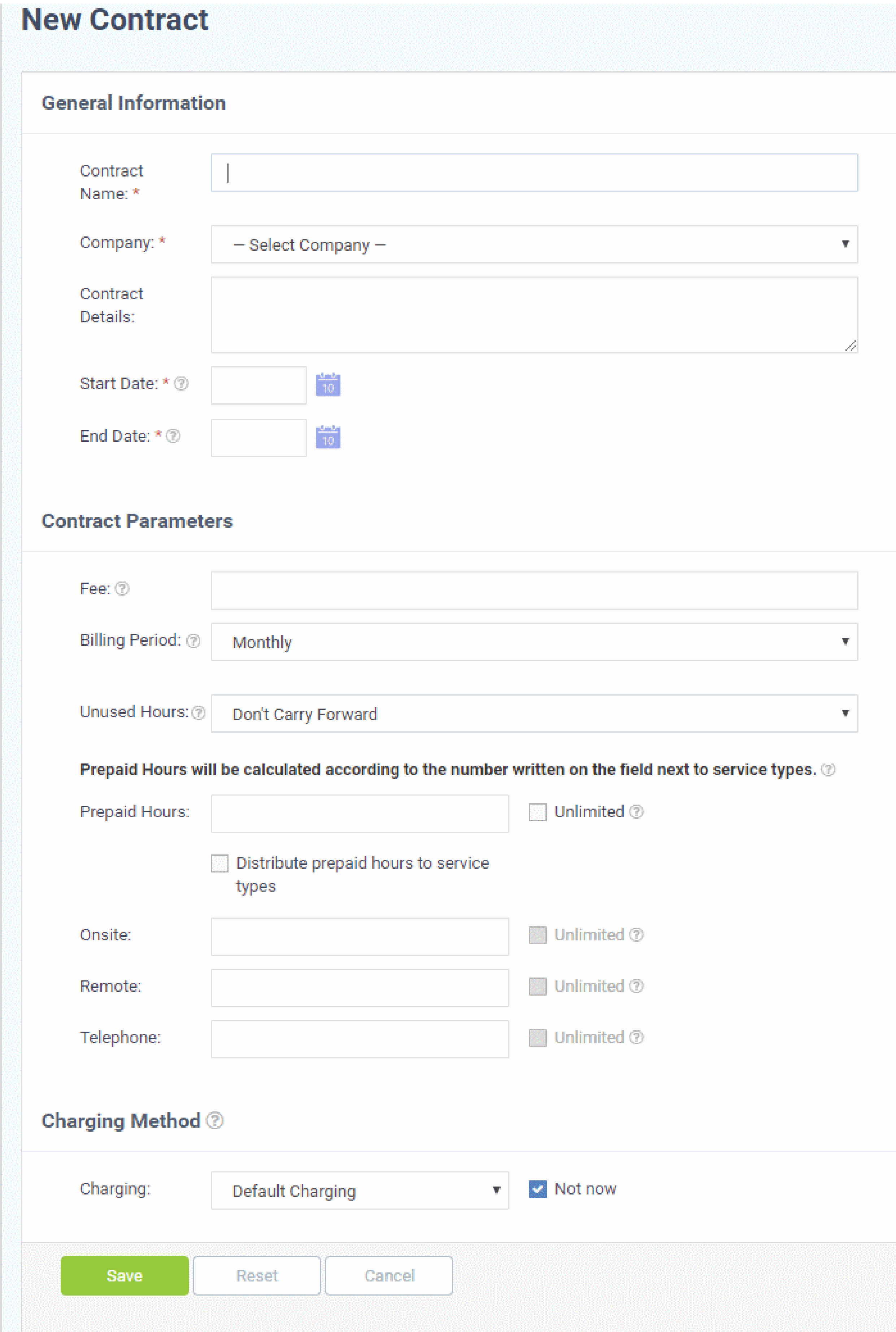
- A contract fee (weekly/bi-weekly/monthly/yearly)
- Pre-paid service hours per billing cycle. These hours are covered by the fee. (optional)
- A charging plan which bills custom rates for work on specific assets (e.g. printers, laptops, mysql etc), or work of a specific type (telephone, on-site, remote). (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 customer-specific asset rate as specified in the selected charging plan. Charging plans can be created in 'Admin Panel' > '**Manage**' > '**Charging**' interface.
- If no custom plan is applied then the global rates in the default charging plan are applied.
- The default charging plan can be managed in 'Admin Panel' > 'Manage' > 'Charging'. For more details, see **Default Charging Plan** in **Manage Charging Plans**.
- For more details on service contracts, see '**Manage Contracts**'.

To create a contract:

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


New Contract
General Information
Contract Name: *
Company: *
– Select Company –
Contract Details:
Start Date: *
End Date: *
Contract Parameters
Fee:
Billing Period:
Monthly
Unused Hours:
Don't Carry Forward
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:
Default Charging
Not now
Save
Reset
Cancel

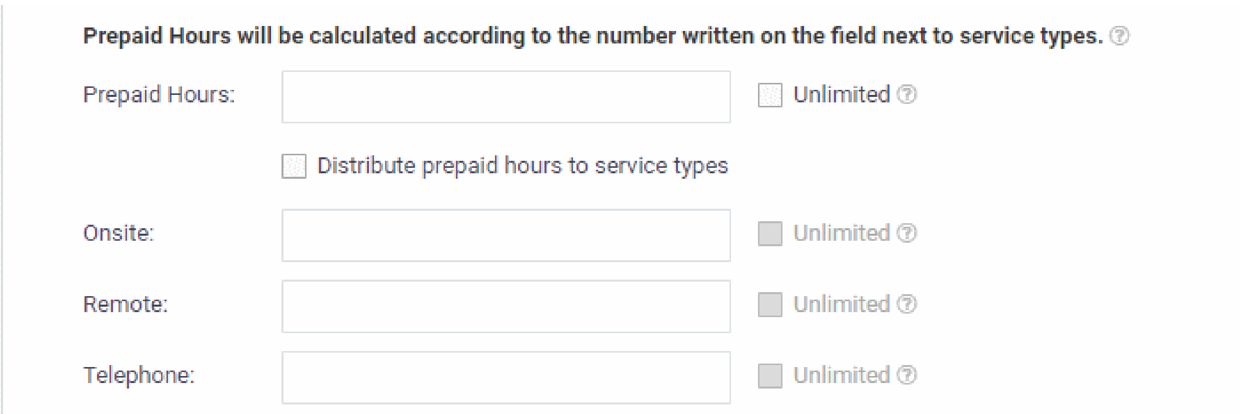
- Complete the form as follows:

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 for 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 standard subscription fee will be charged. The charges for the service sessions will be calculated based on other parameters defined in the contract
- **Billing Period** - Enter the subscription period. The available options are:
  - Weekly
  - Bi-Weekly
  - Monthly
  - Yearly
- **Unused Hours** - Choose whether or not any remaining pre-paid hours at the end of a billing cycle are carried over to the next cycle. 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** - 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

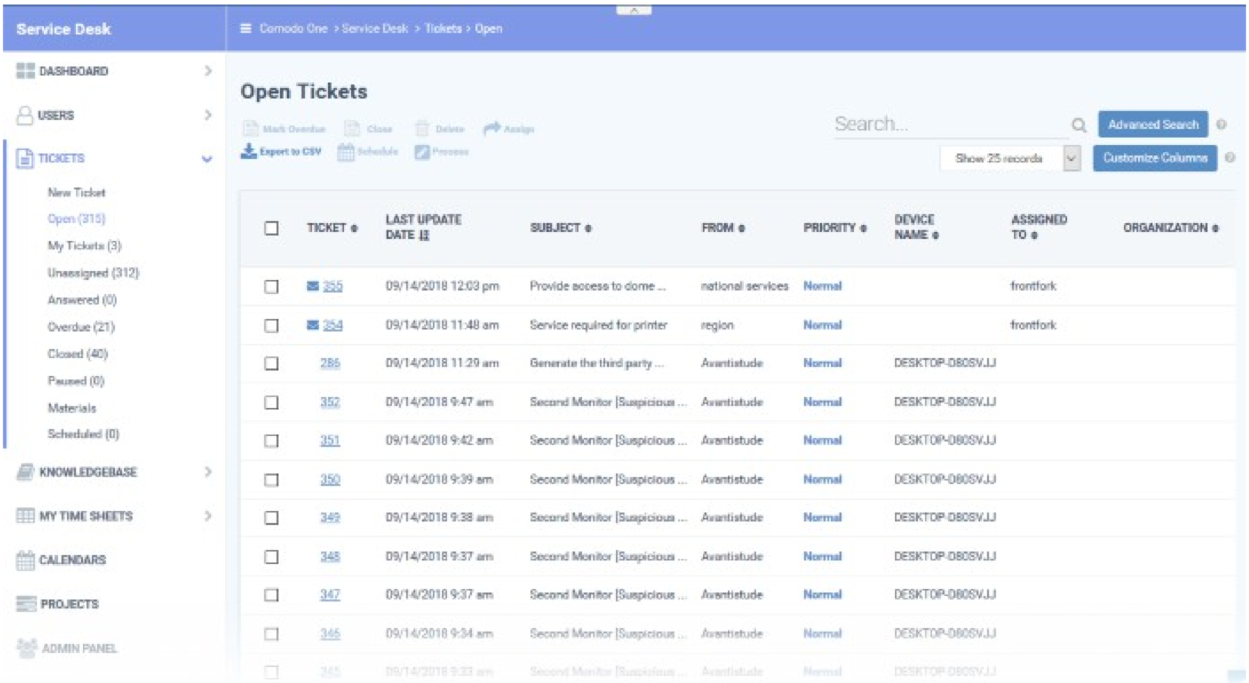
  - **Distribute prepaid hours to service types** - Specify pre-paid hours for individual service types.
    - Unlimited - Provide support of a specific type for free for the full billing period

Charging Method

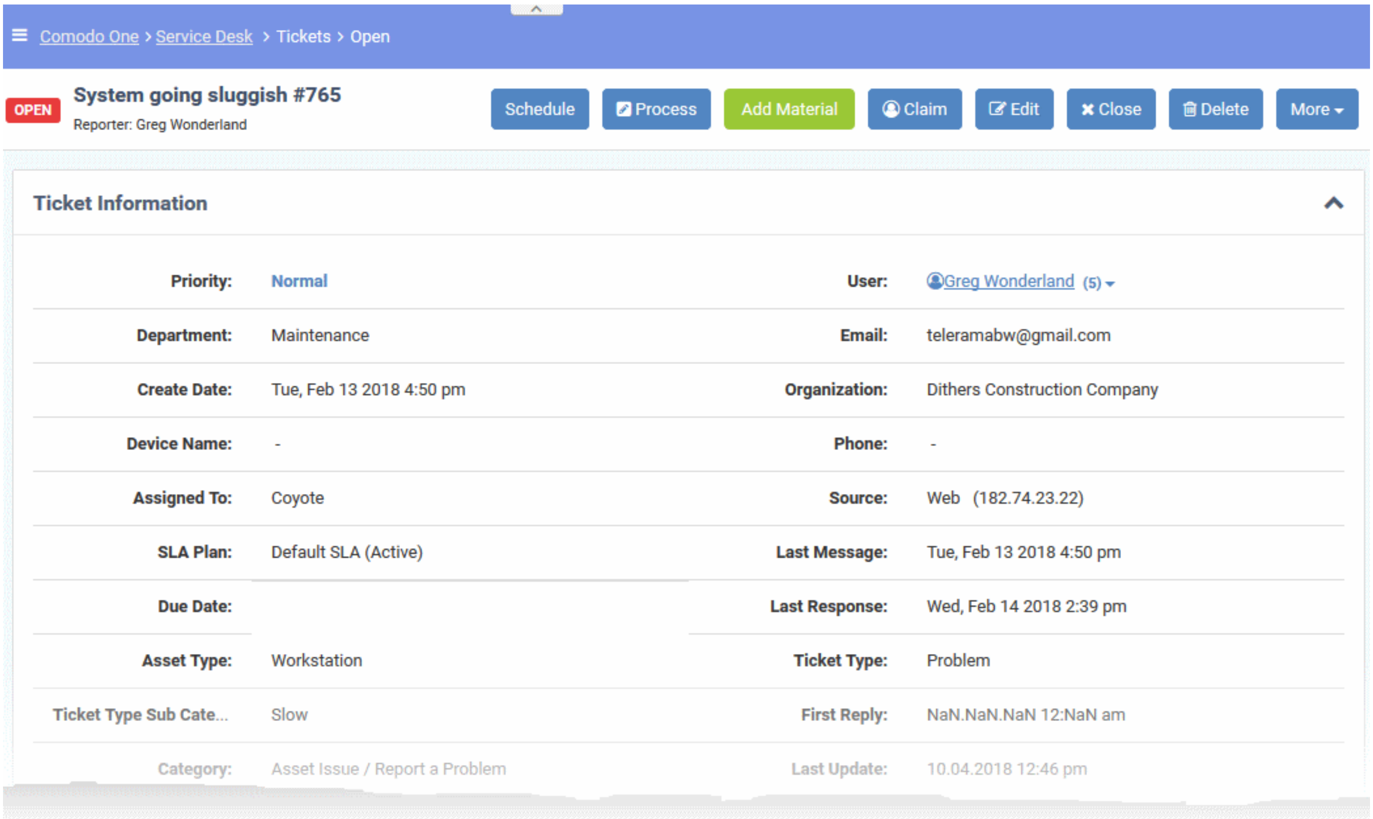
- **Charging** - Select a 'Charging plan' for the contract. If you do not want to choose a charging plan at this moment, select 'Not now'.
    - Charging plans can be created in the admin panel. Click 'Admin Panel' > 'Manage' > 'Charging' > 'Add New Charging'.
    - You can associate a contract with a charging plan at any time.
    - If you do not apply a charging plan then the rates in the default charging plan are applied. See **Default Charging Plan** in **Manage Charging Plans** for more details.
    - Charging plan rates kick in after any pre-paid hours have been exhausted.
- Click 'Save' after completing the form. The new contract will be added and will take effect from the specified start date.

Step 9 - Manage Tickets

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



- 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 '**Manage Tickets**'.



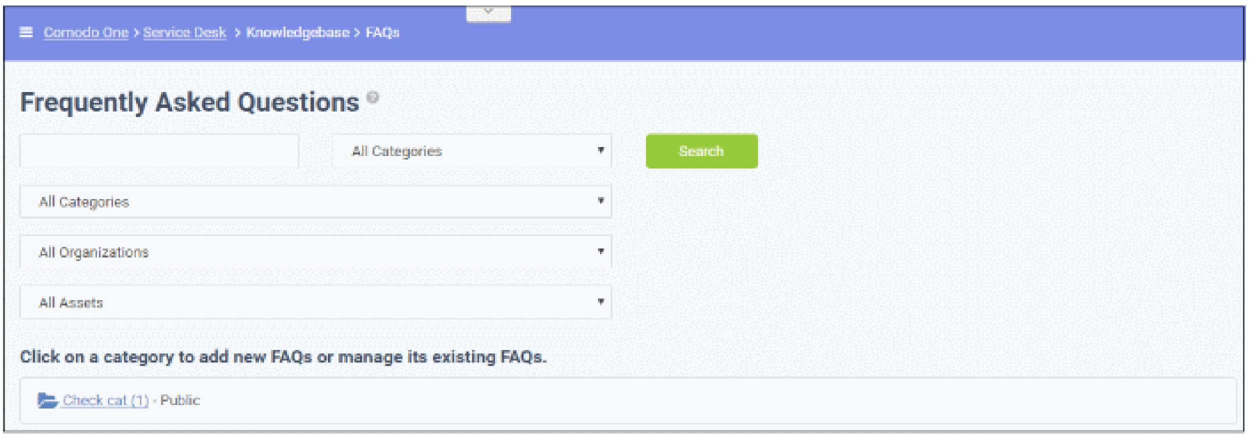
- The structure of your tickets can be customized to your requirements in 'Admin Panel' > 'Settings' > 'Tickets'. See '**Ticket Settings and Options**' for more details.

Step 10 - Managing Knowledgebase

The 'Knowledgebase' allows you to:

- Create a set of FAQs which will be shown in the customer portal to help end users find answers to common problems.
- Create a set of ticket categories. Categories are broad topics which are presented to users when they are creating a ticket. For example, your portal may ask 'Please select the area which you need help with', and present 'Account Changes', 'Connectivity Problems' and 'Billing Issues' as the categories. The ticket can be routed to the appropriate department or staff-member based on the category.
- Create canned responses. Canned responses are pieces of text which can be quickly pasted into ticket replies.

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



To publish an FAQ to the customer-facing web interface you need a public FAQ inside a public category:

1. Create an FAQ category.
   - Individual FAQs must be assigned to a category.
   - Go to 'Staff Panel' > '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'.
2. Create your FAQ
   - Go to 'Staff Panel' > '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.

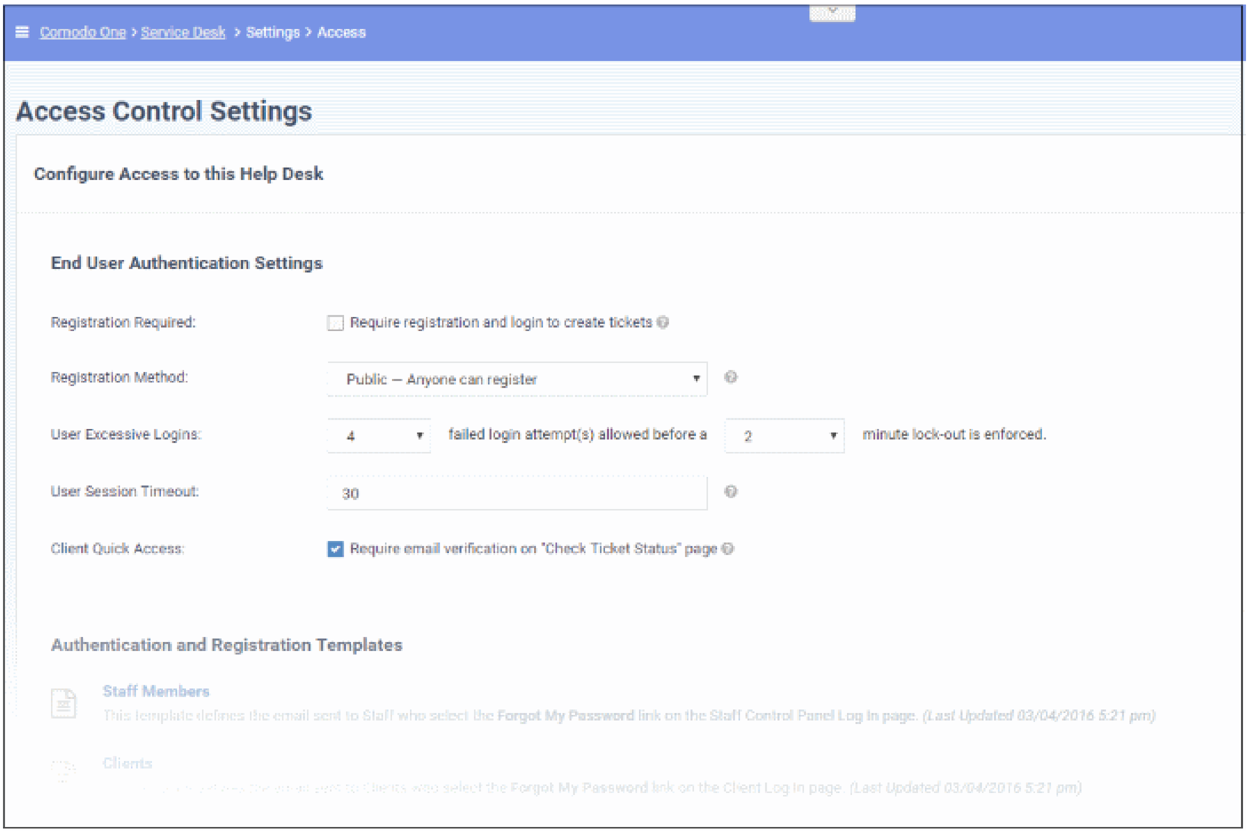
See '**Managing Knowledgebase**' later in this guide for more information.

Step 11 - Access Control Settings

The 'Access Control Settings' interface lets you configure end-user authentication policy, system email templates and registration page templates.

To open the interface:

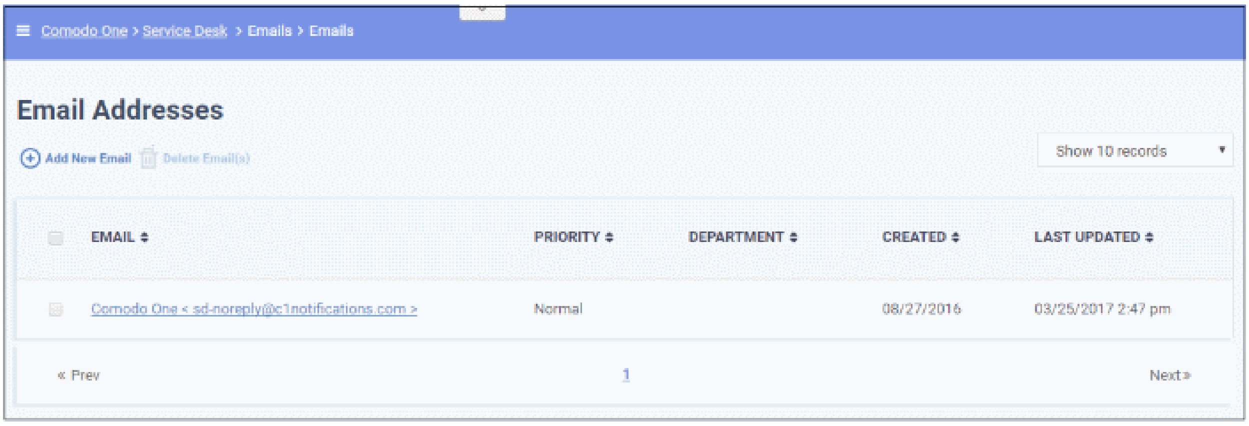
- Click 'Admin Panel' > 'Settings' > 'Access Control Settings'



For more details, see '**Access Control Settings**'.

Step 12 - Configure Auto-response Emails

- 'Email Settings and Options' lets you select the default emails that will be sent as notifications to end-users. Click 'Admin Panel' > 'Settings' > 'Emails' to view this interface
- You can add and configure new emails in 'Admin Panel' > 'Emails' > 'Emails'



For more details, see '**Managing Emails**'.

Step 13 - View Reports

Click 'Admin Panel' > 'Reports' to open this interface

- The reports area lets you generate on-demand reports on a variety of topics.
- Reports can be exported to pdf or .csv and are available in the following categories:
    - Time Log
    - Tickets
    - Assets
    - Service Types
    - Department Tickets
    - Agents (admins/staff members)
    - Users
    - Resource Appointments

'Cost' and 'Contract' reports are available in a different area:

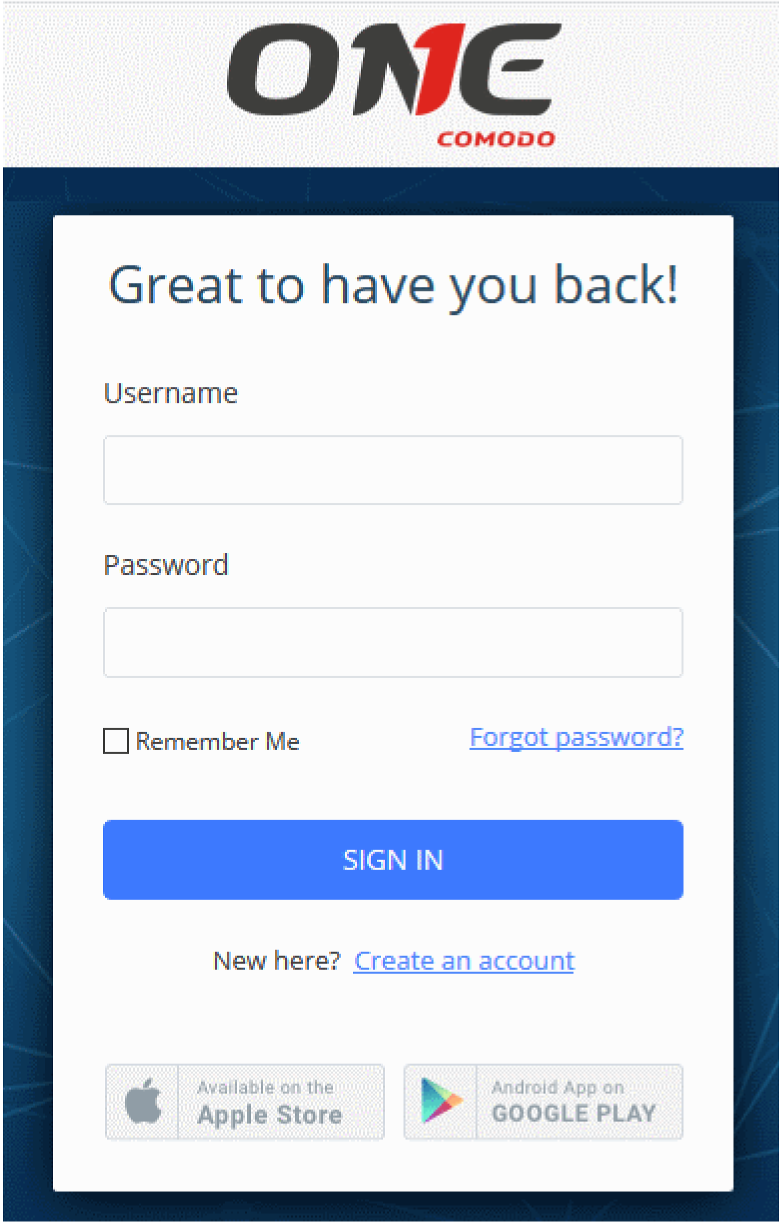
- Click 'Finance' in the left-hand menu
- Select 'Cost' or 'Contracts' to generate the type of report you require.

Additional information:

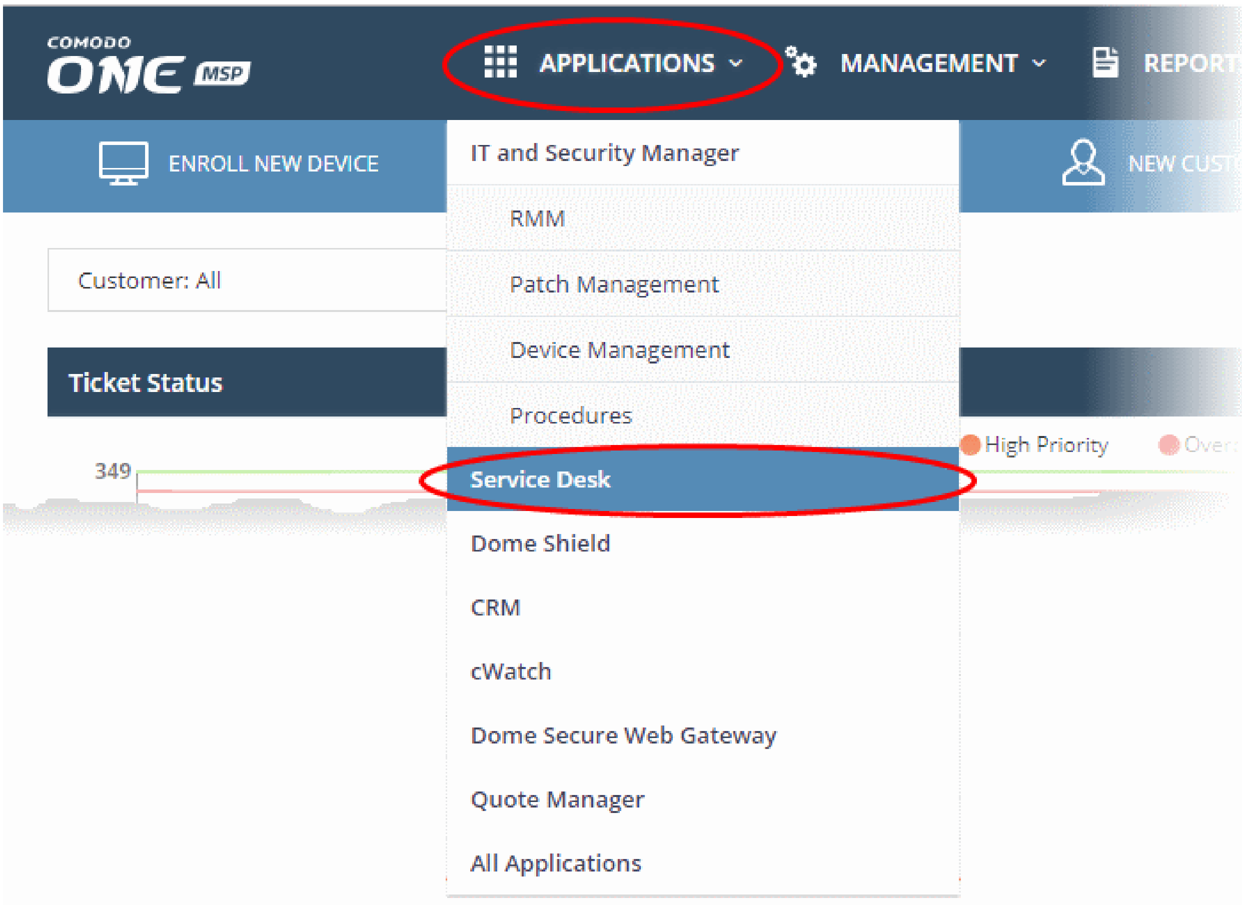
- You can generate targeted reports by adding filters. Filters include date range, organization, department, agent, ticket status, asset type and much more.
- You can also set up scheduled reports which are automatically generated at a specific time and sent to recipients of your choice.

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**.



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



Note 1: Admins can also setup two-authentication of users for additional login security. This can be enabled in the Comodo One application through 'Management' > 'Account' > 'Account Security Details' tab. See **10.3.Setting up Two-Factor Login Authentication** in the C1 admin guide for help with this.

Note 2: You can also set Service Desk as your default page after you login to C1 at one.comodo.com.

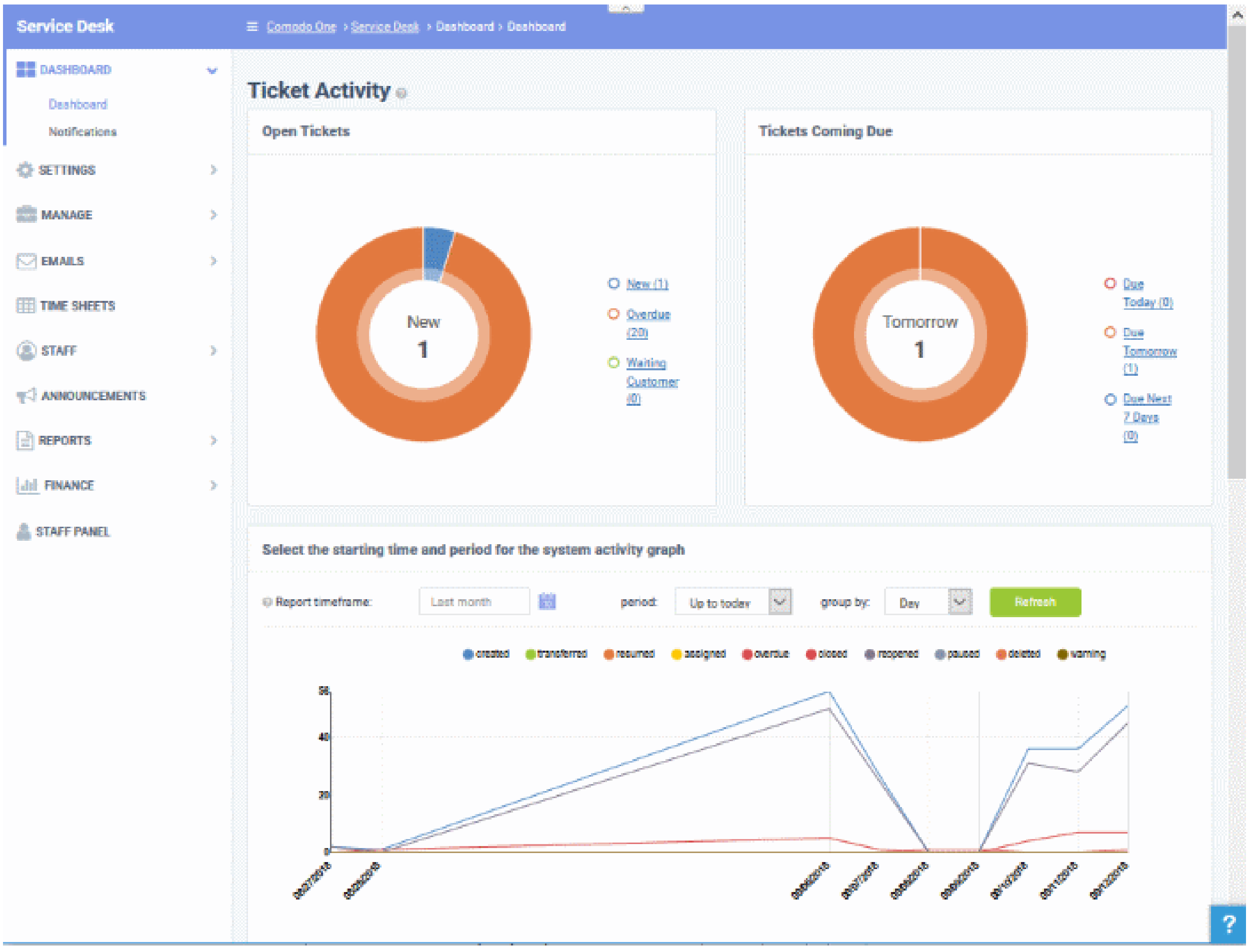
To set Service Desk as your default page:

- Open the C1 interface
- Click your username at top-right then click 'Settings'
- Select 'Set Service Desk as login Page' in the 'Comodo One Login Page' section
- Click 'Save changes'

2 Service Desk Admin Panel

The admin panel is Service Desk's command-and-control center, giving you an immediate overview of ticket statuses and letting you quickly configure settings, alerts, ticket categories, filters, reports, SLA plans and more.

Note: The admin panel is also available to staff members if they have the appropriate privileges. See **Staff Roles** for more details.



Once logged-in, administrators can navigate to different areas of the console by clicking the options on the left of the interface. Tool tips with guidance are available for most features.

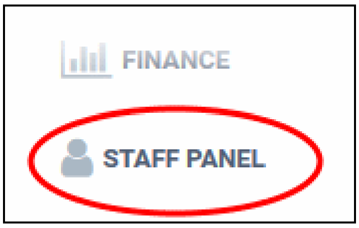
Main Functional Areas

- **Dashboard -** A graphical summary of ticket activity. The dashboard shows tickets per-department and shows the statuses of tickets. The 'Notifications' screen displays alerts for new tickets and for ticket assignments. See **Admin Panel Dashboard** for more details.
- **Settings -** Configure settings for various components such as emails, tickets, knowledgebase, access, auto-responder, alerts & notices and more. See **Service Desk Configuration** for more details.
- **Manage -** Allows admins to manage ticket categories, filters, custom forms, site pages, SLAs, API keys, custom lists, assets and materials. See **Managing Service Desk Components** for more details.
- **Emails -** Manage auto-response mails that are sent to users and admins/staff members. Configure email blacklists and manage email templates. See **Managing Emails** for details.
- **Time Sheets -** Allows admins to review and approve or reject staff time sheets. Time sheets are completed by staff members and detail the amount of time they spent on particular tickets. See '**Managing Time Sheets**' for more details.
- **Staff -** Allows an administrator to manage staff members that provide support to users, create and manage Roles and Departments and assign staff members to them. See **Managing Staff** for more details.
- **Announcements -** Enables admins to manage announcement forms. Announcements are sent to staff members that are subscribed to announcements. See **Managing Announcements** for more details.
- **Reports -** Schedule and /or generate detailed reports for time log, cost, tickets, assets, queue, agents (admins/staff members) and users. See **Generating Reports** for more details.

- **Finance** – Allows the administrator to manage cost and contracts

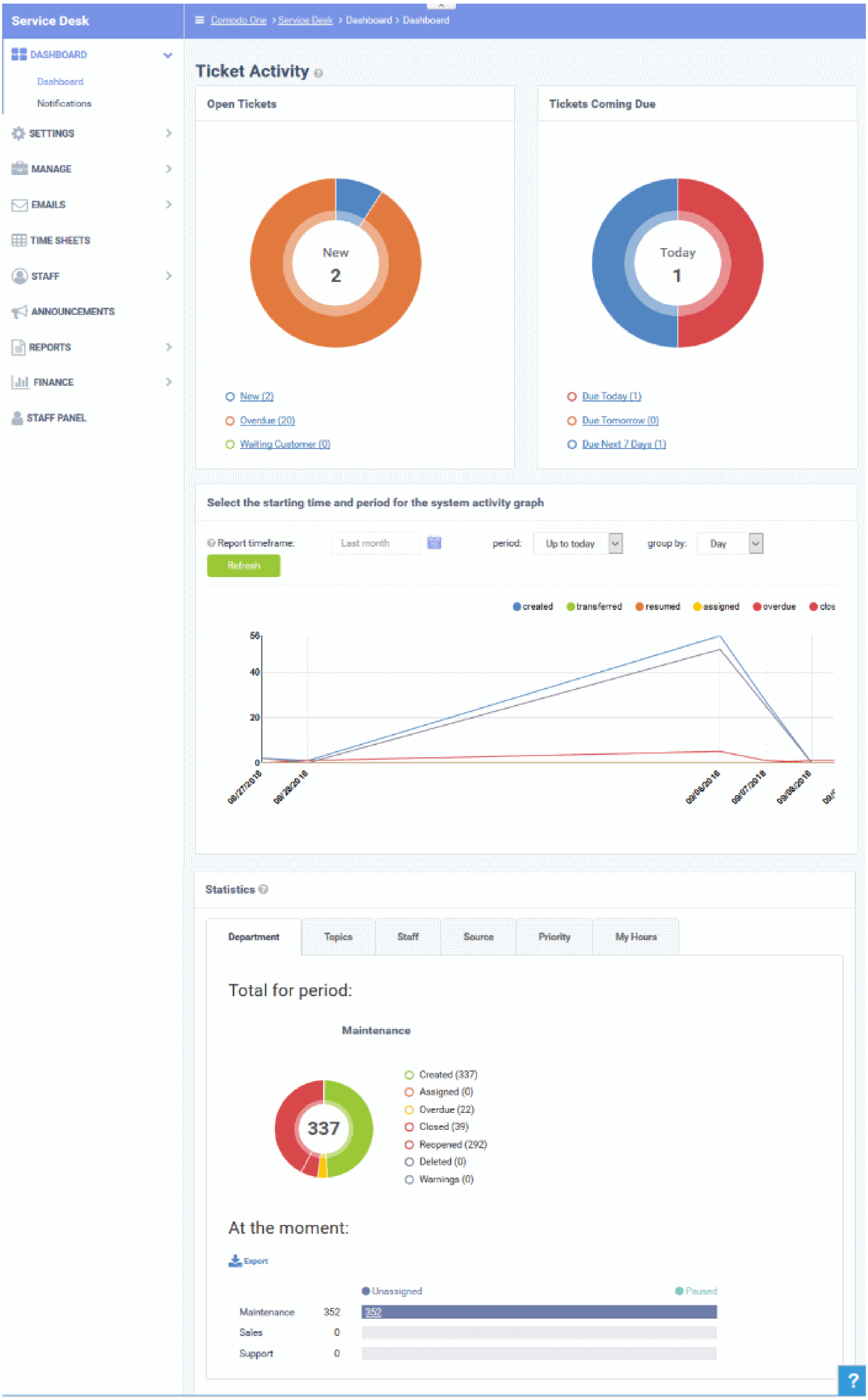
Various interfaces display a tool tip button beside the features. Clicking on this button will display the summarized help content regarding the feature. To close the screen, click the button at top right or click anywhere in the screen.

To toggle between the Admin Panel and Staff Panel, click the Panel tab on the left of the interface.



2.1 Admin Panel Dashboard

The charts and graphs in the admin panel dashboard give you a heads-up on overall ticket activity on your account. The 'Statistics' section shows activity by department, ticket category, staff member and more. Admins can also view time spent on ticket related activities and a list of alerts and notifications sent to staff members.


Service Desk
Comodo One > Service Desk > Dashboard > Dashboard
DASHBOARD
Dashboard
Notifications
SETTINGS
MANAGE
EMAILS
TIME SHEETS
STAFF
ANNOUNCEMENTS
REPORTS
FINANCE
STAFF PANEL
Ticket Activity
Open Tickets
New
2
New (2)
Overdue (20)
Waiting Customer (0)
Tickets Coming Due
Today
1
Due Today (1)
Due Tomorrow (0)
Due Next 7 Days (1)
Select the starting time and period for the system activity graph
Report timeframe:
Last month
period:
Up to today
group by:
Day
Refresh
created
transferred
resumed
assigned
overdue
Statistics
Department
Topics
Staff
Source
Priority
My Hours
Total for period:
Maintenance
337
Created (337)
Assigned (0)
Overdue (22)
Closed (39)
Reopened (292)
Deleted (0)
Warnings (0)
At the moment:
Export
Unassigned
Paused
Maintenance 352
Sales 0
Support 0

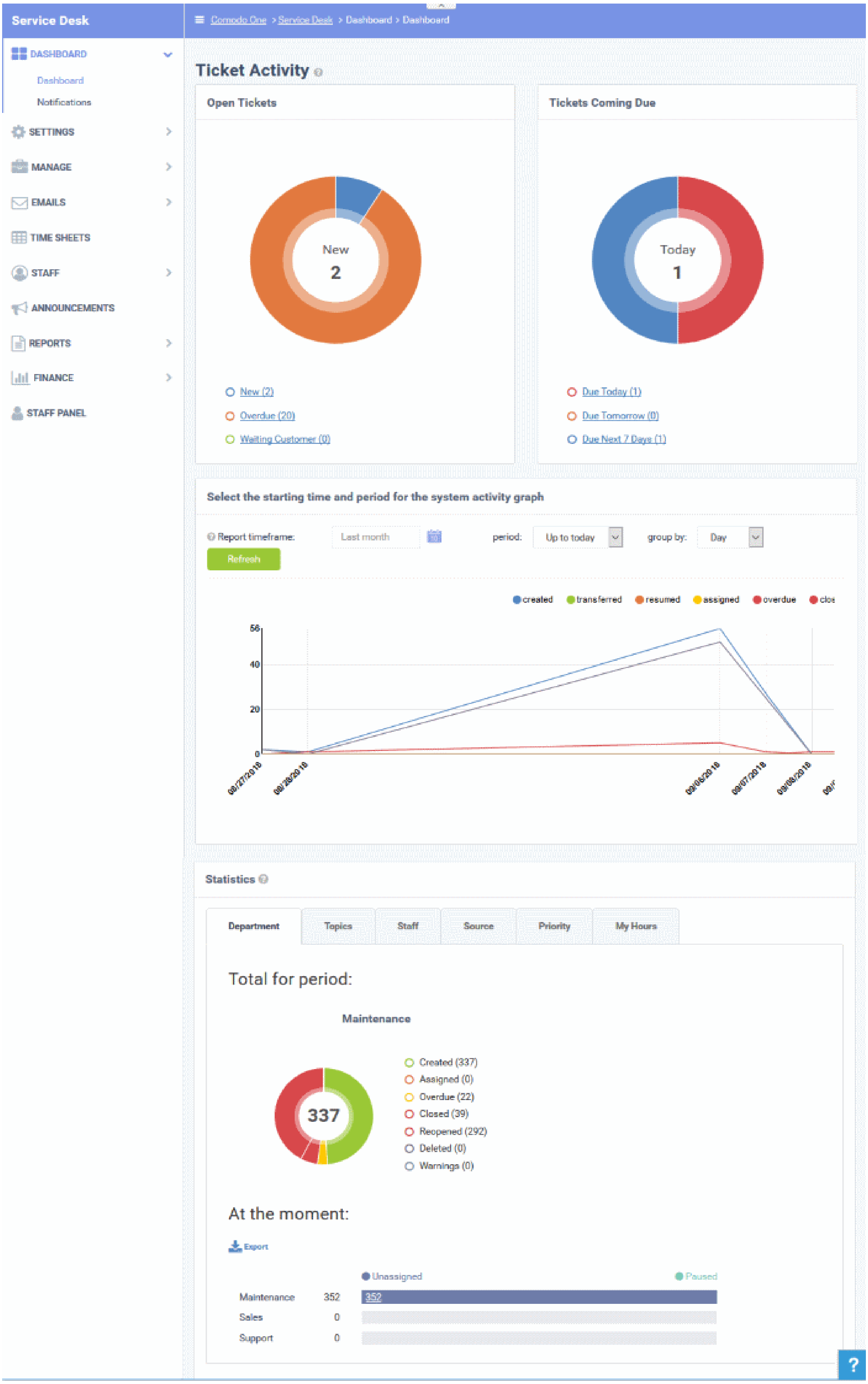
Click the following links for more details:

- **Viewing the Dashboard and Exporting Reports**
- **Viewing Alerts and Notifications**

2.1.1 View the Dashboard and Export Reports

Service Desk's powerful dashboard is the single pane of glass which allows you to easily monitor the status and progress of tickets in your account.

- The 'Admin' dashboard contains detailed statistics and charts about tickets for all clients.
- The 'Staff' dashboard shows similar information but only for clients assigned to the staff member.


Service Desk
Comodo One > Service Desk > Dashboard > Dashboard
DASHBOARD
Dashboard
Notifications
SETTINGS
MANAGE
EMAILS
TIME SHEETS
STAFF
ANNOUNCEMENTS
REPORTS
FINANCE
STAFF PANEL
Ticket Activity
Open Tickets
New
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Tickets Coming Due
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Due Next 7 Days (1)
Select the starting time and period for the system activity graph
Report timeframe:
Last month
period:
Up to today
group by:
Day
Refresh
created
transferred
resumed
assigned
overdue
Statistics
Department
Topics
Staff
Source
Priority
My Hours
Total for period:
Maintenance
337
Created (337)
Assigned (0)
Overdue (22)
Closed (39)
Reopened (292)
Deleted (0)
Warnings (0)
At the moment:
Export
Unassigned
Paused
Maintenance 352
352
Sales 0
Support 0

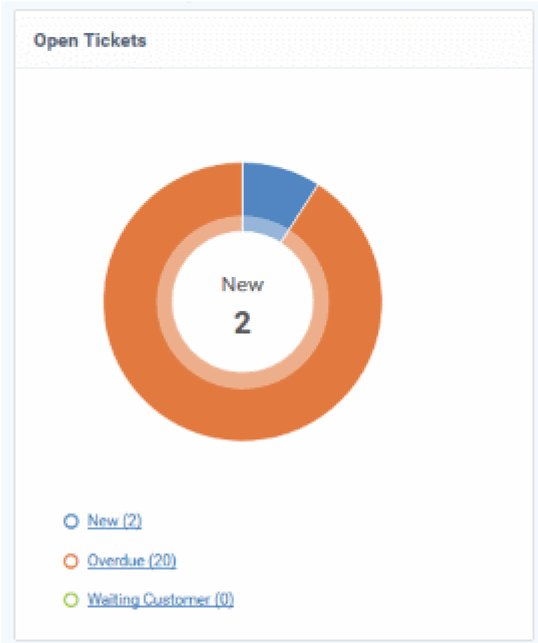
- To view the Admin Dashboard, click the 'Dashboard tab' in the Admin Panel.

Ticket Activity

The upper pane of this section shows the total open tickets, a summary of pending tickets, and the number of tickets that are due shortly. The system activity graph shows daily, weekly and monthly ticket activity. The lower pane contains charts showing tickets by status, department, ticket category and more.

Open Tickets

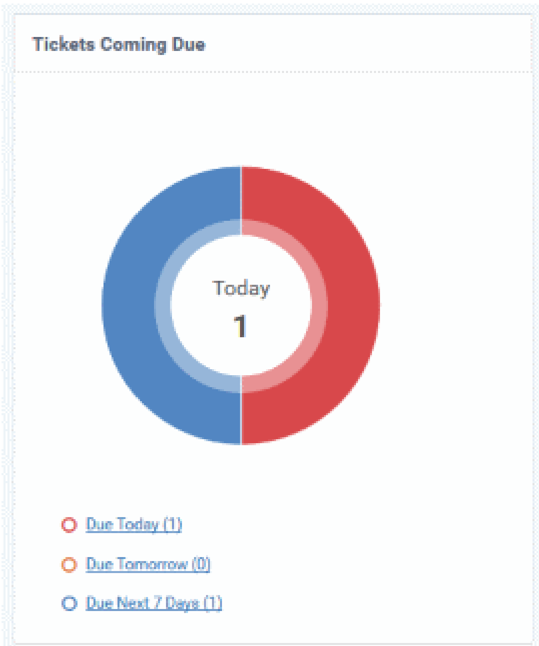
The total number of unresolved tickets. The pie chart breaks this down into tickets that are yet to be attended (new), overdue and awaiting customer response.



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

Ticket Coming Due

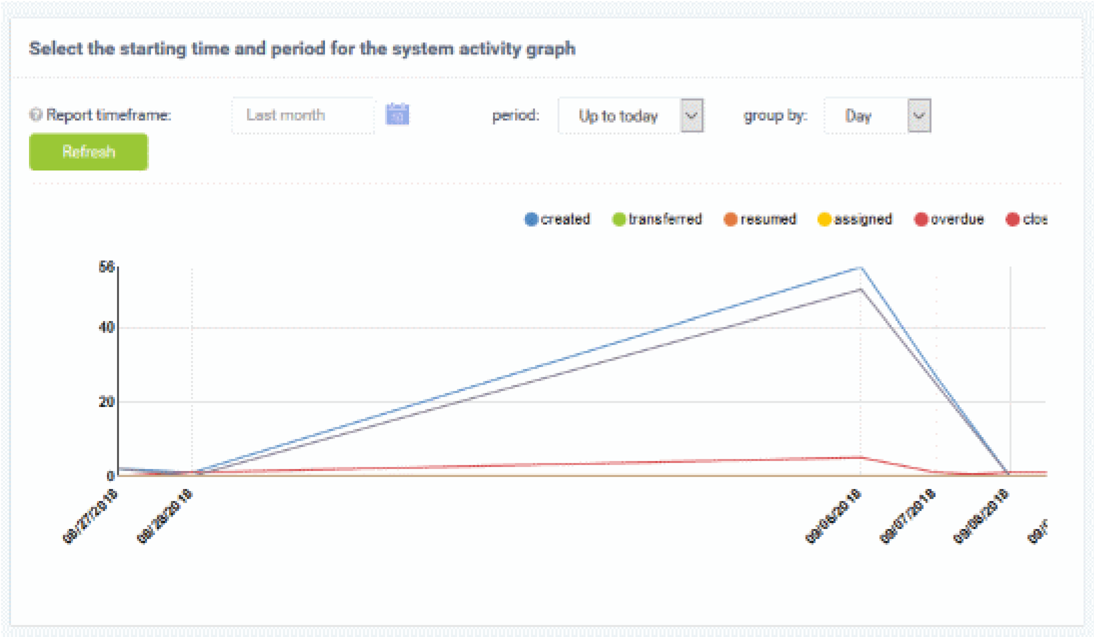
A heads up on tickets that are due in the near future:



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

Ticket Activity - History

Line chart which shows a break-down of ticket statuses in your 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.

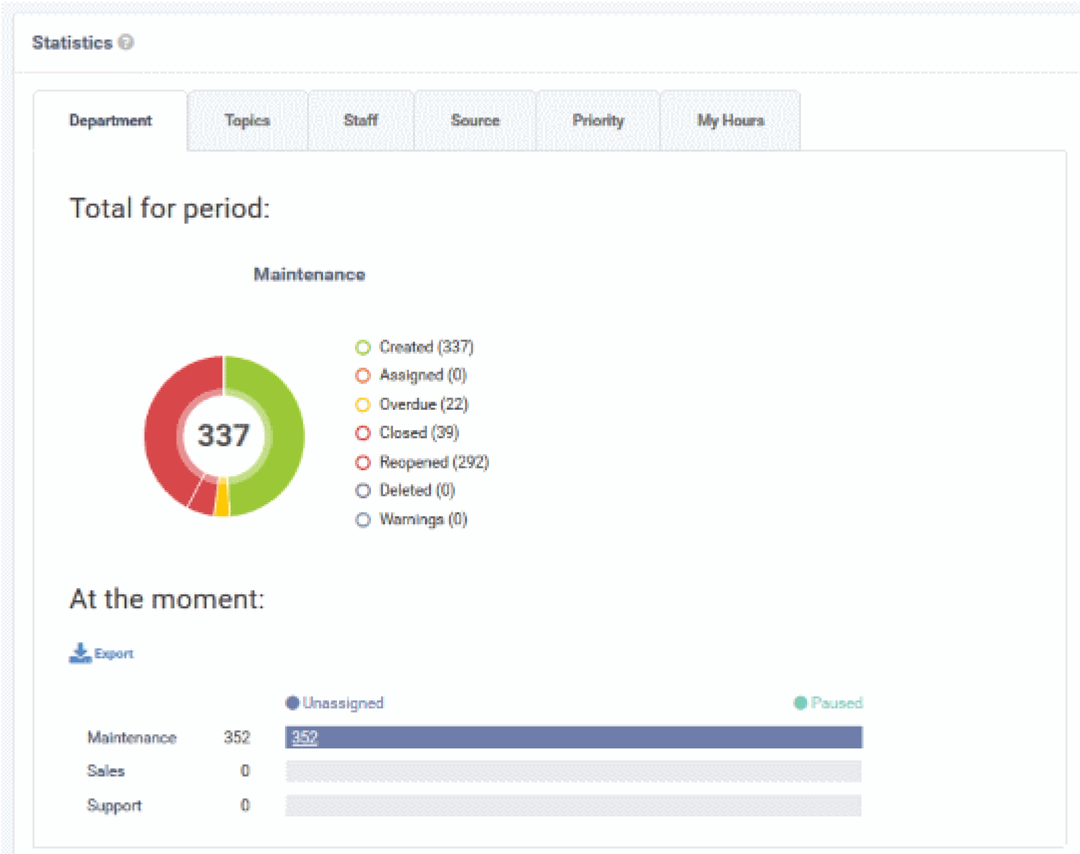


By default, the graph shows details for the previous 30 days. Use the 'Report timeframe' options to change the time-period. Click 'Refresh' to implement your changes.

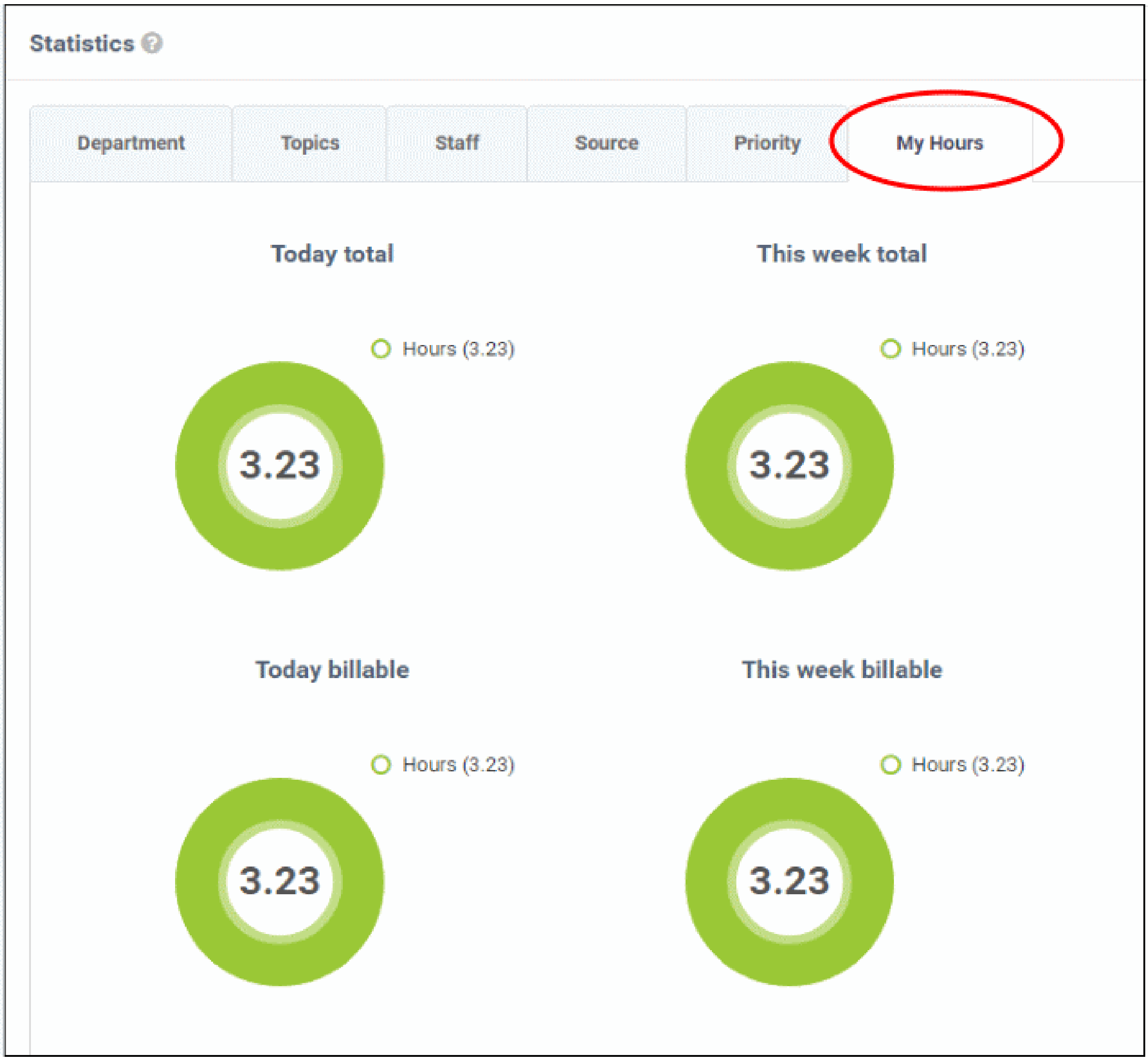
Statistics

The statistics area shows details about for the full 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 grace period 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 administrator.



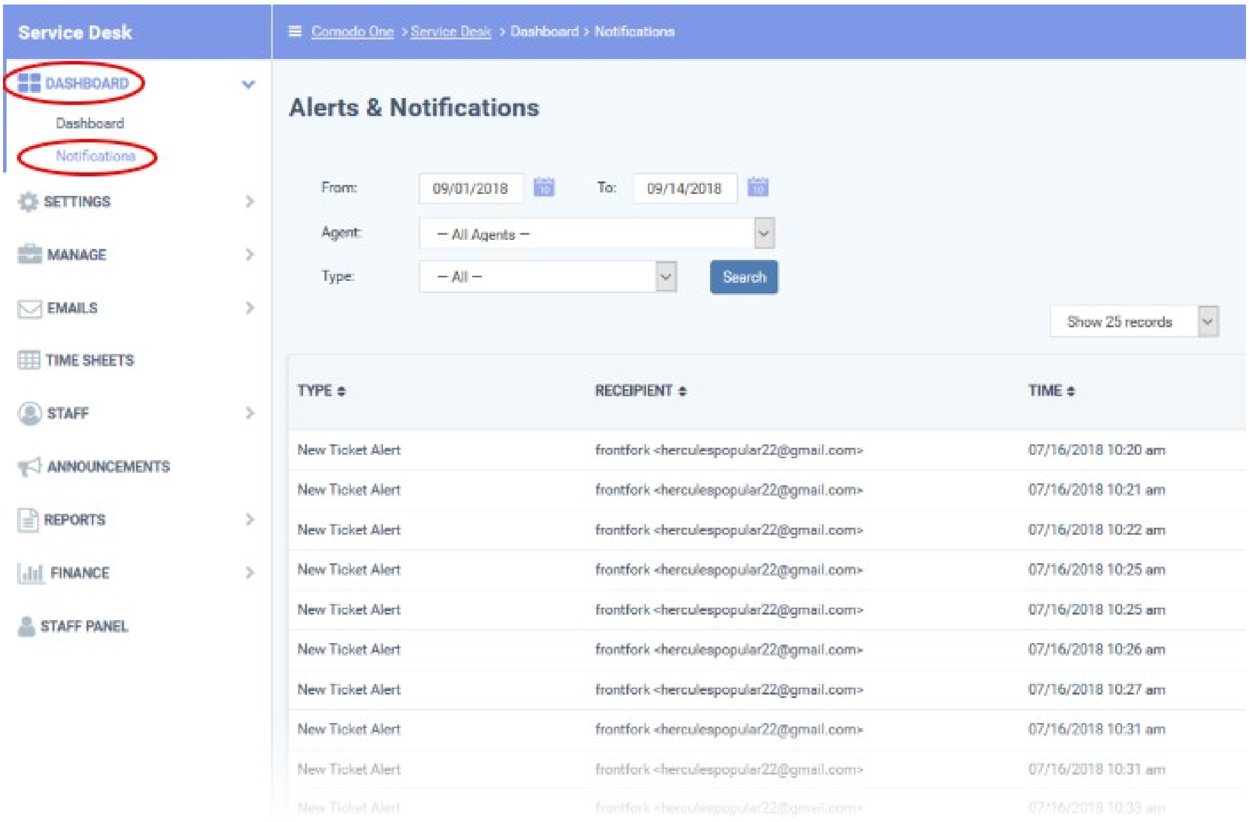
Exporting Statistics to a CSV file

Click the 'Export' button at the bottom of the interface to download the 'Statistics' file 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 Alerts & Notifications

The 'Alerts & Notifications' interface shows alerts that were sent when a new ticket was created or assigned to a staff member. Alerts are sent to users and agents if so configured in 'Settings' > 'Alerts & Notices'.

- To view details of alerts sent, click 'Dashboard' on the left then 'Notifications' in the Admin Panel



Clicking any column header sorts the item based on the alphabetical order of the entries in that column. You can filter the items based on the period, staff and alert types.

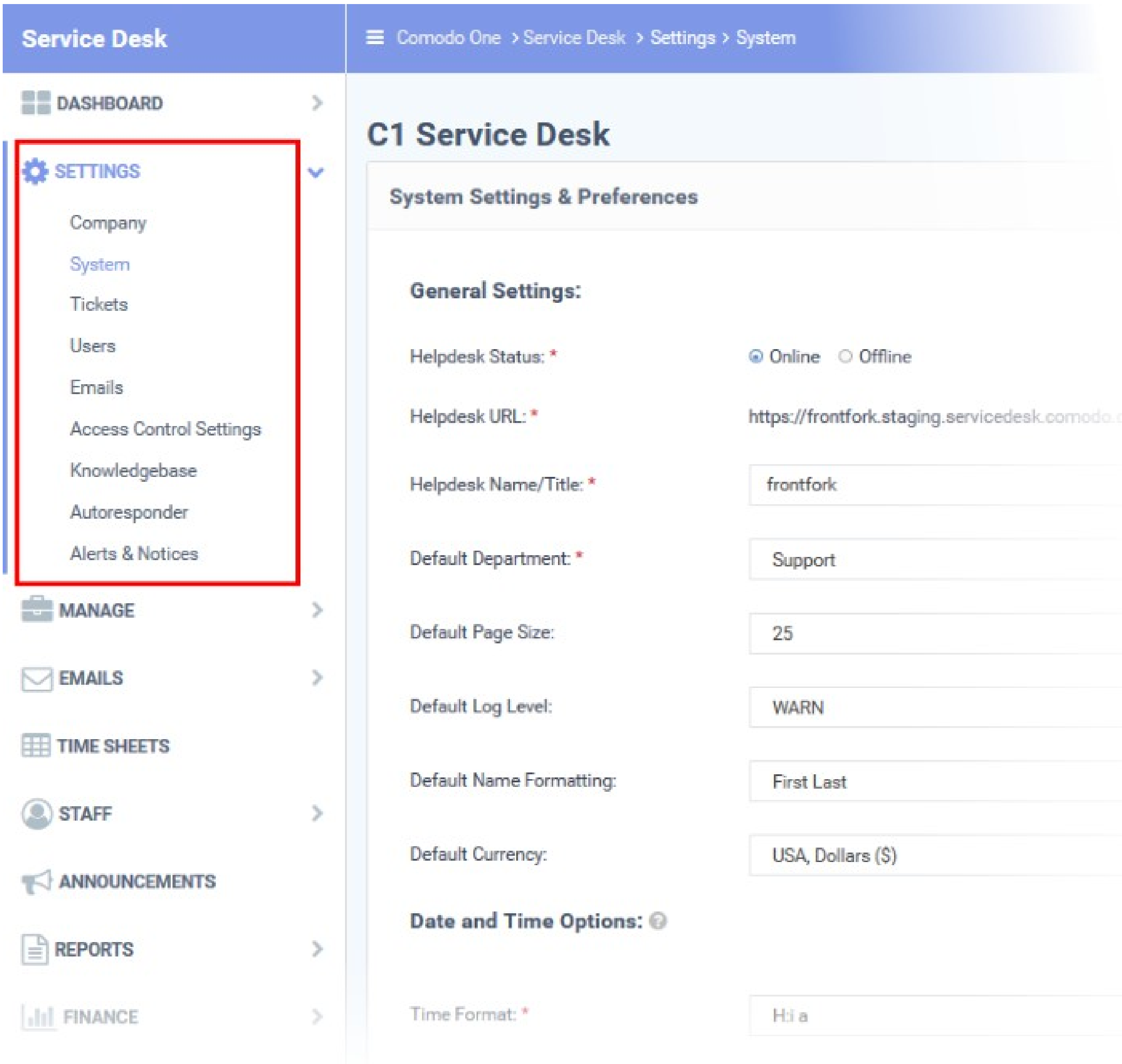
- To filter the alerts based on the period, select the period by choosing the dates from the 'From' and 'To' fields.
- To filter the alerts based on the staff, select the staff from the Agent drop-down
- To filter the alerts based on the type, choose the type from the 'Type' drop-down.

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 records per page.

2.2 Service Desk Configuration

The 'Settings' tab lets you configure system settings, tickets, emails, access control, the knowledgebase, alerts and company profile.

- Make sure you are in the 'Admin Panel' (see the last link on the left)
- Click 'Settings'



Click the following links to find out more about each category:

- **Configure Company Profile**
- **C1 Service Desk System Settings**
- **Ticket Settings and Options**
- **User Registration Settings**
- **Email Settings and Options**
- **Access Control Settings**
- **Knowledge Base Settings and Options**

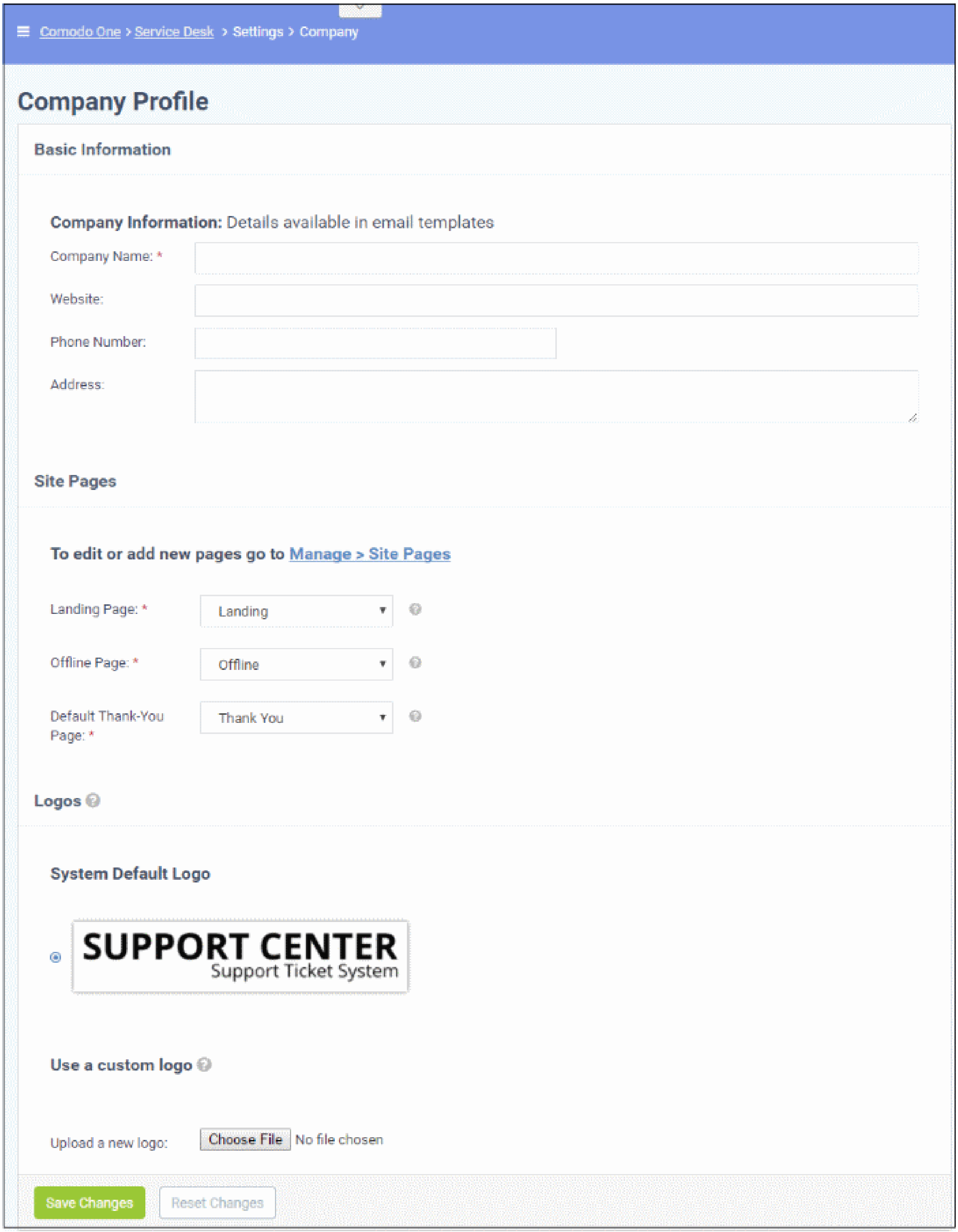
- **Autoresponder Settings**
- **Configure Alerts and Notices**
- **Configure Two Factor Authentication**

2.2.1 Configure Company Profile

- Click 'Admin Panel' > 'Settings' > 'Company'
- The 'Company Profile' area contains details about the organization which is providing the support service.
- This includes name, address, contact info, website URL and company logo.

To configure company profile information

- Make sure you are in the 'Admin Panel' (see the last link on the left)
- Click 'Settings' on the left then 'Company'



Note: The field labels explained in this section are default field labels. You can change the labels in 'Forms'. Go to 'Admin Panel', click 'Manage' > 'Forms' then select the 'Company Information' form to edit its labels. The number of fields shown in the Company Information can also be added or removed in the Forms interface. See **Forms** for information.

Company Information

- **Company Name:** Enter the name of the company that provides the support service
- **Website:** Enter the website of the company
- **Phone Number:** Enter the company's phone number
- **Address:** Enter the address of the company
- **Company Email:** Provide the company's email address.

Note: The number of fields shown in the Site Pages section can be added in the Site Pages interface. Go to Admin Panel, click Manage > Pages to add more pages. Click a page to edit its labels. See **Client Portal Pages** for information.

Site Pages

- **Landing Page:** Select the landing page to be displayed in your support site. The pages can be added/edited from the 'Manage' > 'Pages' screen of the Admin Panel. See **Web Pages** for more details.
- **Offline Page:** The page that will be displayed when the support site is offline for users. See **C1 Service Desk System Settings** for more details.
- **Default Thank-You Page:** The page that is displayed after a user submits a ticket. This page can also be associated with ticket categories. See **Web Pages** for more details about adding/editing pages and Ticket Categories for associating the page to ticket categories.

Logos

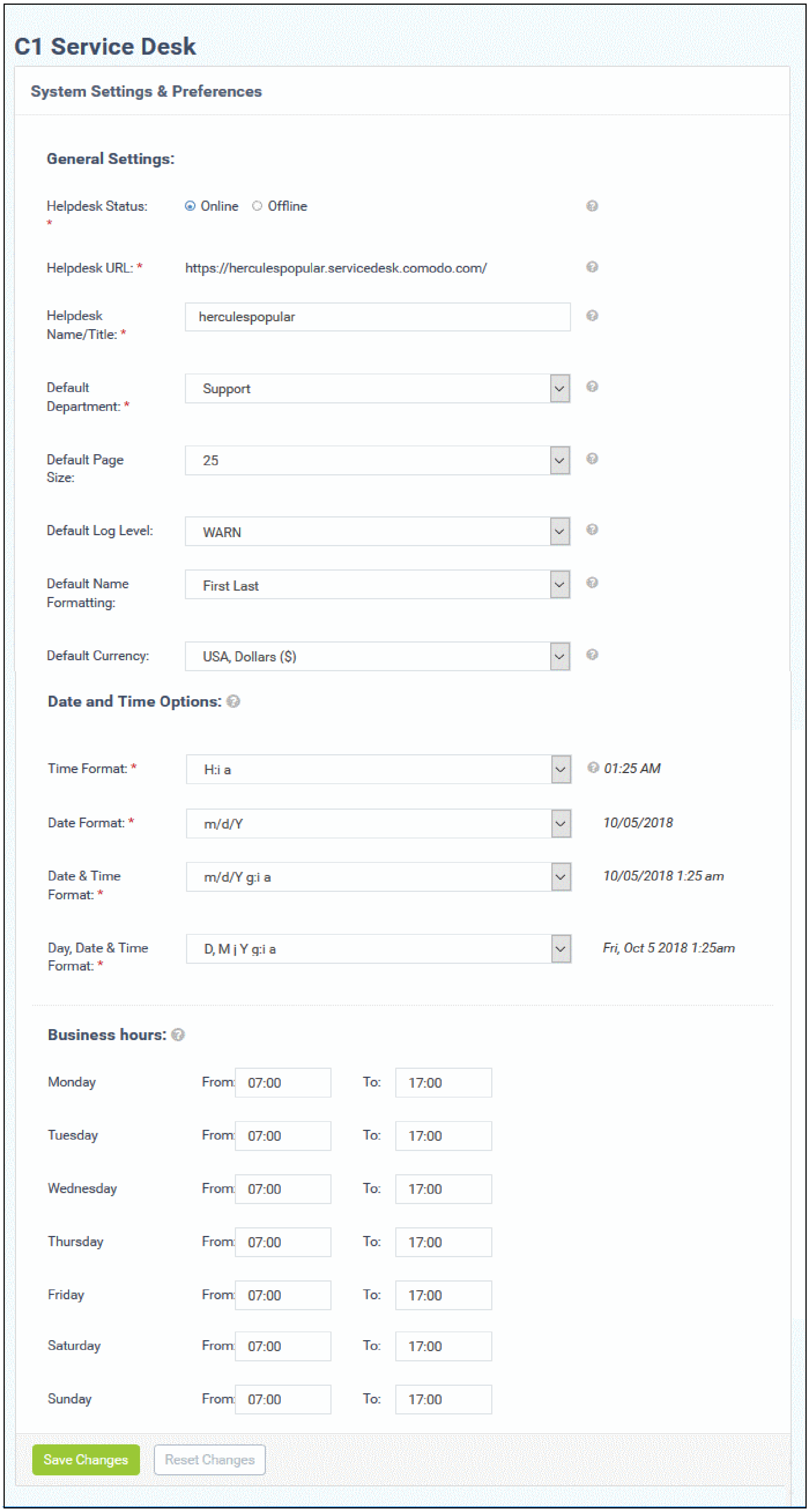
- You can choose to use the system default logo or upload a custom logo that will be displayed on your support site.
- If you choose to upload a new custom logo, the image should be in gif, jpg or png formats. To reduce loading time, please keep the image to default size of 817 px X 170 px.
- To upload an image, click the Browse button, select the image and click 'Open'.
- Click 'Save Changes' to apply your changes.

2.2.2 C1 Service Desk System Settings

- Click 'Admin Panel' > 'Settings' > 'System'
- The system settings area lets you configure your support page, configure the default department that tickets are routed to, configure your business hours and more.

To configure Service Desk System Settings

- Make sure you are in the 'Admin Panel' (see the last link on the left)
- Click 'Settings' on the left then 'System'


C1 Service Desk
System Settings & Preferences
General Settings:
Helpdesk Status: *
Online
Offline
Helpdesk URL: *
https://herculespopular.servicedesk.comodo.com/
Helpdesk Name/Title: *
herculespopular
Default Department: *
Support
Default Page Size:
25
Default Log Level:
WARN
Default Name Formatting:
First Last
Default Currency:
USA, Dollars ($)
Date and Time Options:
Time Format: *
H:i a
01:25 AM
Date Format: *
m/d/Y
10/05/2018
Date & Time Format: *
m/d/Y g:i a
10/05/2018 1:25 am
Day, Date & Time Format: *
D, M j Y g:i a
Fri, Oct 5 2018 1:25am
Business hours:
Monday From: 07:00 To: 17:00
Tuesday From: 07:00 To: 17:00
Wednesday From: 07:00 To: 17:00
Thursday From: 07:00 To: 17:00
Friday From: 07:00 To: 17:00
Saturday From: 07:00 To: 17:00
Sunday From: 07:00 To: 17:00
Save Changes
Reset Changes

General Settings

- **Helpdesk Status:** Select whether your customer facing support portal should be online or offline.
- **Helpdesk URL:** The URL of your customer facing support portal (configured during setup). This URL is included in support emails to end-users to direct them to your help desk. They can submit tickets and read FAQs/knowledgebase articles at your help desk.
- **Helpdesk Name/Title:** The 'title' of your support site. This will appear as the label of your site in the user's browser and any bookmarks.
- **Default Department**: Select the default department for service desk.
    - Tickets will be assigned to the default department if they are not already routed to a department by a ticket category, by incoming email settings, or by ticket filter settings. See **Ticket Settings and Options** and **Departments** for more details.
    - New staff members added to Comodo One will be assigned to the default department in Service Desk. You can change the department for a user at anytime in 'Admin Panel' > 'Staff' > 'Staff Members'. See **Update a staff member** in **Staff Members** for more details.
- **Default Page Size:** Select the number of items that should be displayed per page in ticket queues in the Staff Panel. Support personnel can also customize this number for their own account under 'My Preferences'. See **My Profile** for more details.
- **Default Log Level:** Select the minimum issue severity level that should be recorded in the 'System Log'. The options are 'Debug', 'Warn', and 'Error'. 'Debug' is the lowest severity and 'Error' is the highest. Choosing the least severe option will log all issues.
- **Purge Logs:** Select how long System Logs should be retained before they are deleted.
- **Default Name Formatting:** Select the name format that will be used throughout the system. Email templates will use it for name if no other format is specified in the variable. See **Email Templates** for more details.
- **Default Currency:** Select the currency that will be used throughout the system. The setting will take effect once the changes are saved.
    - The default currency will be used for pricing when staff add materials to a ticket. See **Managing Materials and Expense Items** to find out more.
    - It will also be used in the following interfaces:
        - 'Admin Panel' > 'Manage' > 'Charging'. See **Manage Charging Plans** for more details.
        - 'Staff Panel' > 'Contracts'. See **Manage Contracts** for more details.

Date and Time Options

The date and time format you choose will apply to all users. For more details on the values refer to the page **http://php.net/manual/en/function.date.php**. Service Desk will follow the time zone settings made through the Comodo One console. Refer to the online help page of Comodo One Settings at **https://help.comodo.com/topic-289-1-716-8485-Configuring-C1-Settings.html** for more details.

Business Hours

Enter the business hours that will be taken as base for Service Level Agreement (SLA) time calculations. For example, say an SLA defines issue resolution time as12 hours and your business hours are set at 8 hours per day (8 AM - 4.00 PM). If a ticket is raised on a Sunday, the SLA will start count on Monday morning for 8 hours and continue counting until 12 pm on Tuesday. If the issue is not solved by Tuesday noon then you will have breached the SLA. See **Service Level Agreements** for more details.

- Click 'Save Changes' to apply your updates

2.2.3 Ticket Settings and Options

- Make sure you are in the 'Admin Panel' (see the last link on the left)

- Click 'Settings' > 'Tickets'
- The global settings area lets you configure default parameters for tickets submitted to your organization.
- Settings made here are applied globally to all tickets, regardless of department or ticket category.

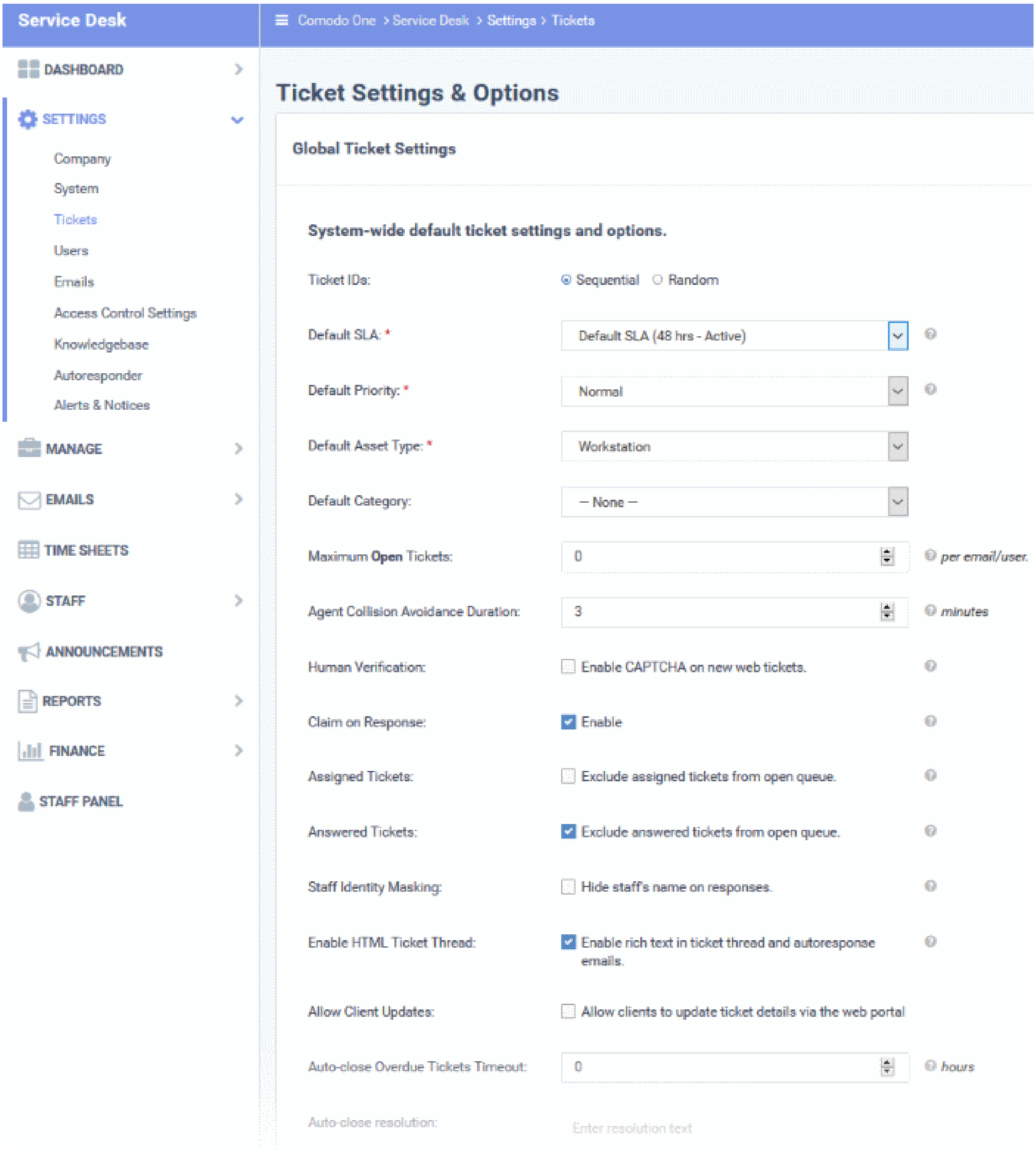
To configure ticket settings and options

- Open the Admin Panel
- Click 'Settings' on the left then 'Tickets'

The interface contains four areas:

- **System-wide default ticket settings and options**
- **Time Settings (Global Setting)**
- **Attachments**
- **Accepted File Types**

System-Wide Default Ticket Settings and Options

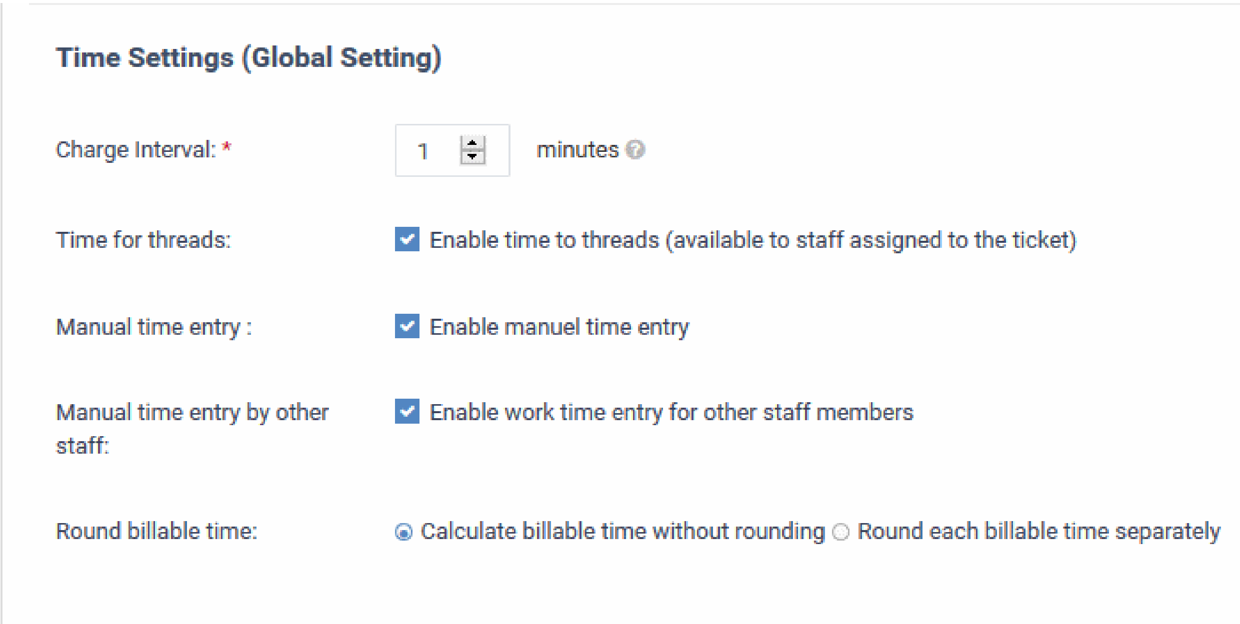


- **Ticket IDs:** Select whether the ticket IDs should be generated sequentially or randomly
- **Default SLA:** Select the Service Level Agreement (SLA) that determines how long a ticket can remain 'Open' before it is rendered 'Overdue'. See **Service Level Agreements** for more details.
- **Default Priority:** Select the default priority for tickets that are not assigned a priority automatically. Tickets are automatically assigned with priorities depending on the **Ticket Categories** associated with them, **Ticket Filter** settings and routed **departments**.
- **Default Asset Type:** Select the asset type to be associated with newly generated tickets by default. The user can change the asset type while creating a new ticket.
- **Default Category**: The ticket category that will be assigned to a new ticket if the user does not select a category.
- **Default Scheduling Time Range**: The minimum length of time that can be allocated to ticket schedules

and appointments.

- **Maximum Open Tickets**: Enter the maximum number of tickets an end user is allowed to have 'Open' status in the help desk. If the number of tickets created by a user, and are pending to be attended reaches this number, the same user cannot create new tickets, until some of the previous tickets are attended. Enter the value '0' to disable this limitation.
- **Agent Collision Avoidance Duration:** Enter the maximum length of time an Agent (admin/staff member) is allowed to hold a lock on a ticket, meaning other admins/staff members cannot edit this ticket till the lock is released. Entering the value '0' will disable this lockout feature.
- **Human Verification**: If selected, a CAPTCHA will be enabled in the client portal to verify that a ticket is created by a human.
- **Claim on Response**: If enabled, each unassigned ticket will be automatically assigned to the agent that first responds to it. Please note that reopened tickets are always assigned to last respondents.
- **Assigned Tickets**: If enabled, assigned tickets will not be visible in 'Open' Tickets queue in the Tickets interface of the staff panel.
- **Answered Tickets**: If enabled, all answered tickets will be visible in 'Answered 'Tickets queue, else, they will be retained in the 'Open' Tickets queue in the Tickets interface of the staff panel.
- **Staff Identity Masking**: Enable this option to mask the identity of the admin/staff member to the user. That is, the user will not know the admin/staff member's name that is providing the support.
- **Enable HTML Ticket Thread**: If enabled, rich text formatting in the email communications will be allowed between Clients and admins/staff members.
- **Allow Client Updates**: If enabled, end users can update the ticket details through the service desk web portal.
- **Auto-close Overdue Tickets Timeout**: The number of hours after which overdue tickets will be automatically closed. Enter '0' to disable this limitation, so overdue tickets will not be auto-closed.

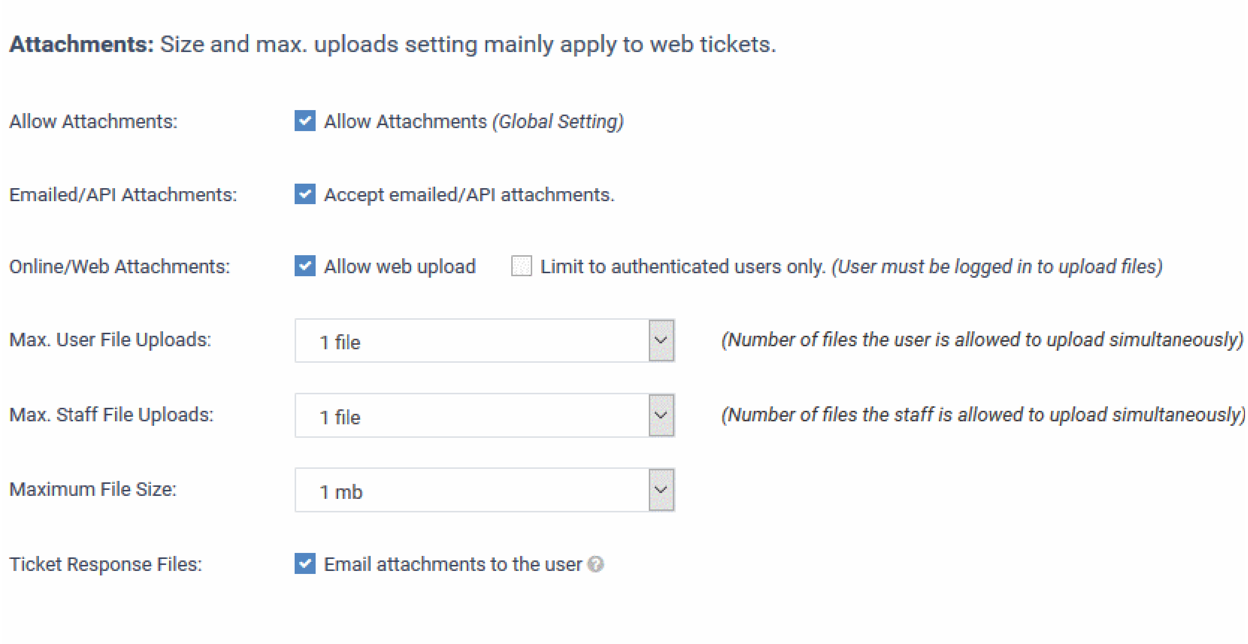
Time Settings (Global Setting)



- **Charge Interval**: Enter the minimum amount of billable time for a ticket for rounding off the fraction in the time spent on a ticket.
- **Time for threads**: Displays an automatic timer on the ticket details interface. The timer starts when a staff member opens the ticket and stops when they close the session. The timer can also be manually paused and resumed by staff.

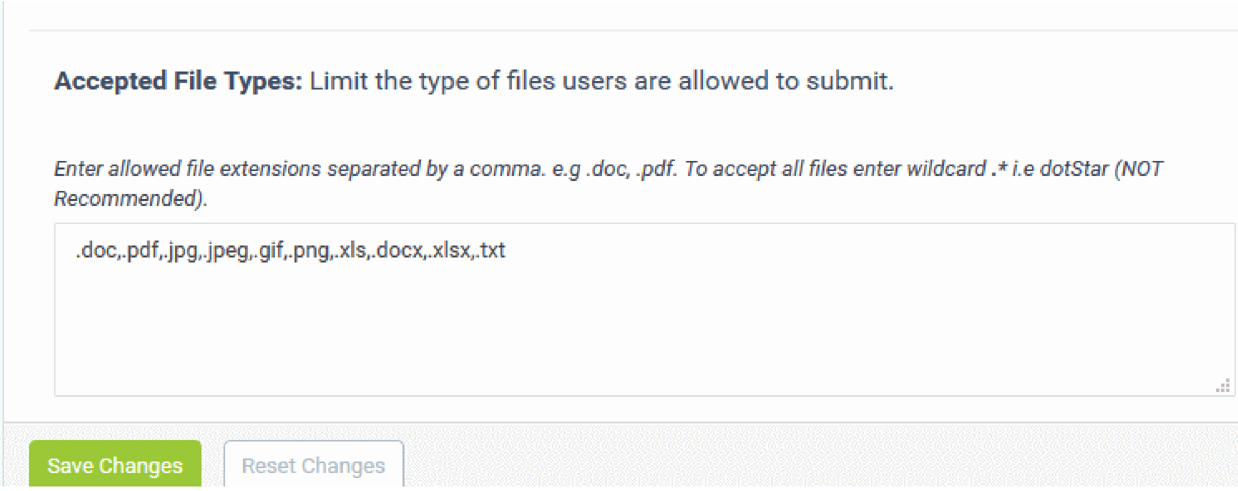
- **Manual time entry**: Allows staff to manually enter time spent to the ticket. This can be used to record out-of-system work such as on-site visits.
- **Manual time entry by other staff**: Allows staff other than the person to whom the ticket is assigned to manually add their time spent to the ticket.
- **Round billable time**: Configure whether or not to round-up billable time.

Attachments



- **Allow Attachments**: Users will be allowed to upload attachments to the tickets they create and the Staff members will be allowed to upload attachments in their replies to tickets.
- **Emailed/API Attachments**: Choose whether users can attach files to email tickets, or tickets created over api. (Applicable only if the previous option 'Allow Attachments' is enabled)
- **Online/Web Attachments**: Choose whether users can attach files to tickets created using your online web-interface. (Applicable only if the previous option 'Allow Attachments' is enabled)
- **Max. User File Uploads**: Select the maximum number of files a user is allowed to upload simultaneously.
- **Max. Staff File Uploads**: Select the maximum number of files a staff member is allowed to upload simultaneously.
- **Maximum File Size**: Select the maximum size of individual files that can be attached to tickets.
- **Ticket Response Files:** If enabled, any attachments an admin/staff member may attach to a ticket response will also be included in the email to the user.

Accepted File Types



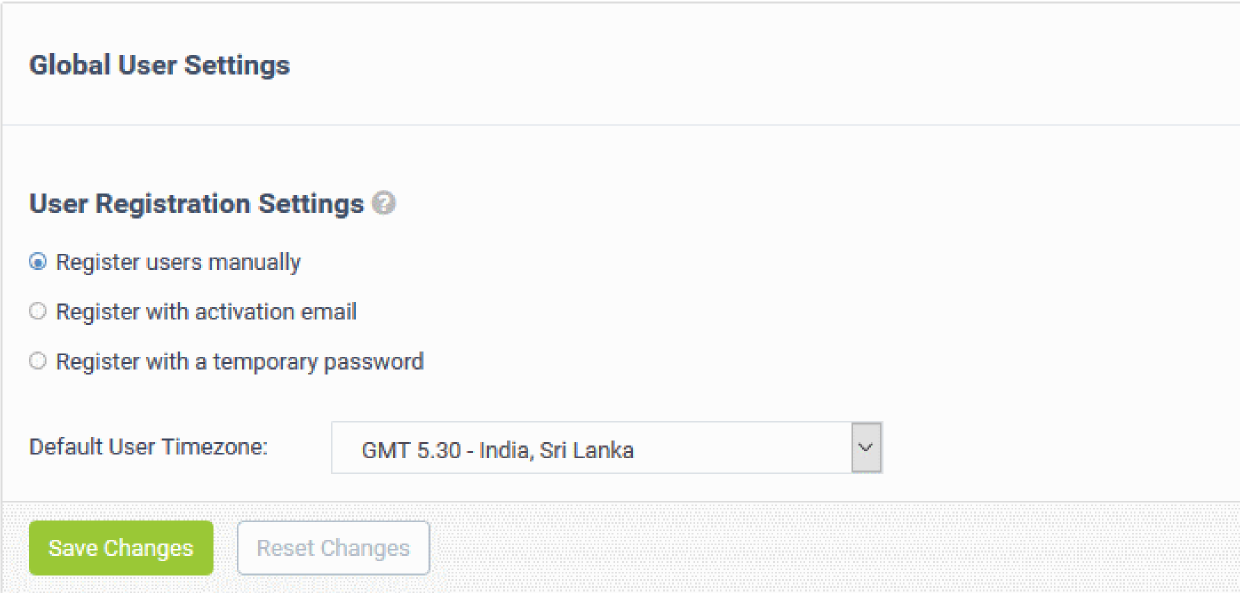
- Add file types that can be allowed as attachments, by entering the file extensions.Each file extension should be separated by a comma.
- Click the 'Save Changes' button for the changes to take effect.

2.2.4 User Registration Settings

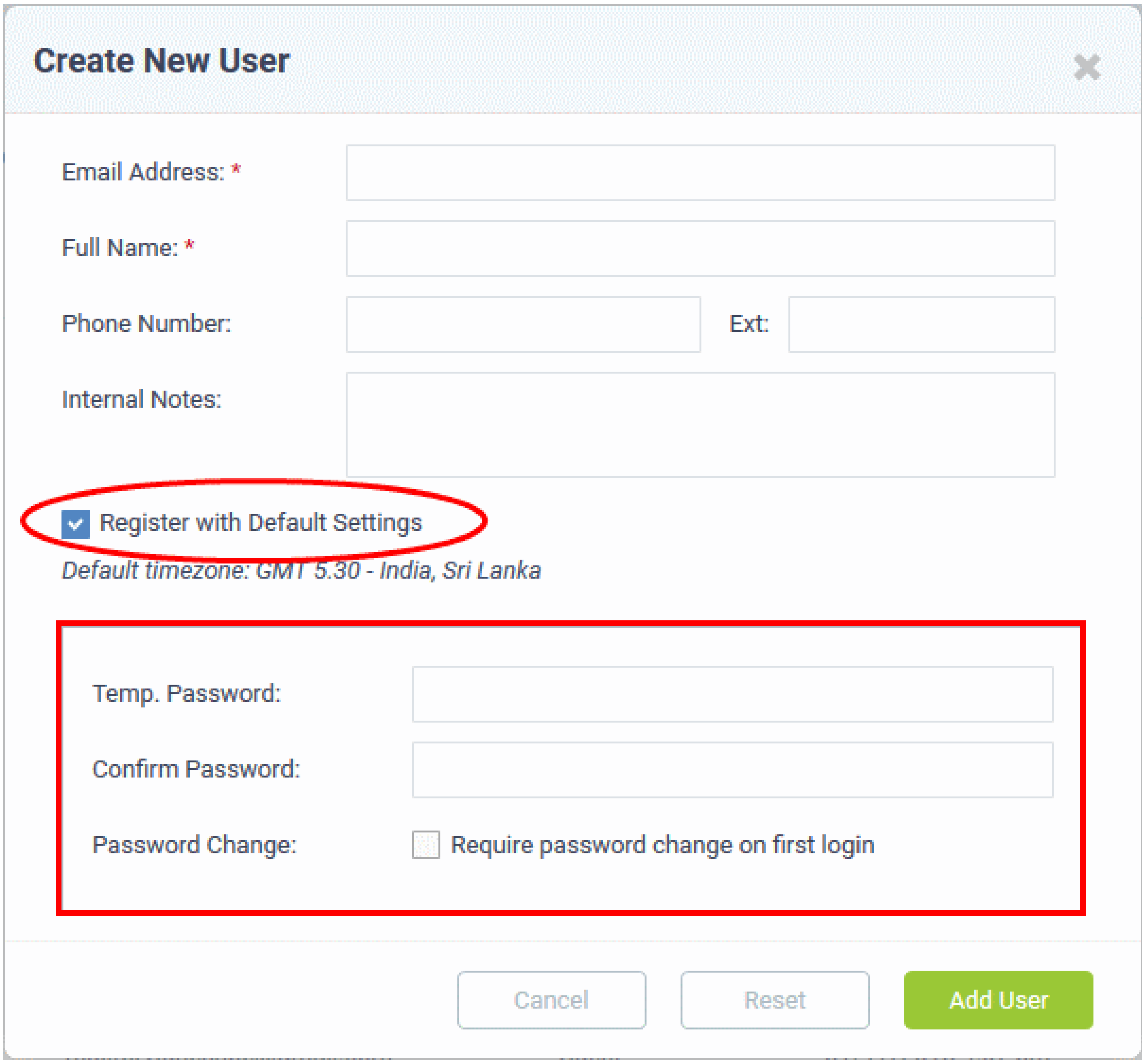
- Click 'Admin Panel' > 'Settings' > 'Users'
- 'Users' are the individuals who submit tickets to your support team. They can submit tickets via your support center interface or by email.
- The 'Global User Settings' interface lets you choose how to register new user accounts. You can register them manually, via activation mail, or with a temporary password.
- The setting you choose here will apply ***if*** 'Register with default settings' is enabled in the 'Create New User' dialog.
    - Click 'Staff Panel' > 'User Directory' > 'Add New User' to see the 'Create New User' dialog.
    - If you uncheck the 'Register with default settings' box then you can choose registration method on an individual basis.
- The settings in this interface only apply to users that you manually add, or import from CSV. These settings do not apply to:
    - Users who register themselves by signing up at the web portal. These users always receive an activation email.
    - Users who are automatically added when they create ticket in the ITSM console. These users are to be registered manually. See the explanation under **Register a User** in **Manage Users** for more details.

To configure default user registration settings

- Make sure you are in the 'Admin Panel' (see the last link on the left)
- Click 'Settings' on the left then 'Users'



- **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)



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.

    - Default User Timezone - Select the time zone to which the users belong from the drop-down

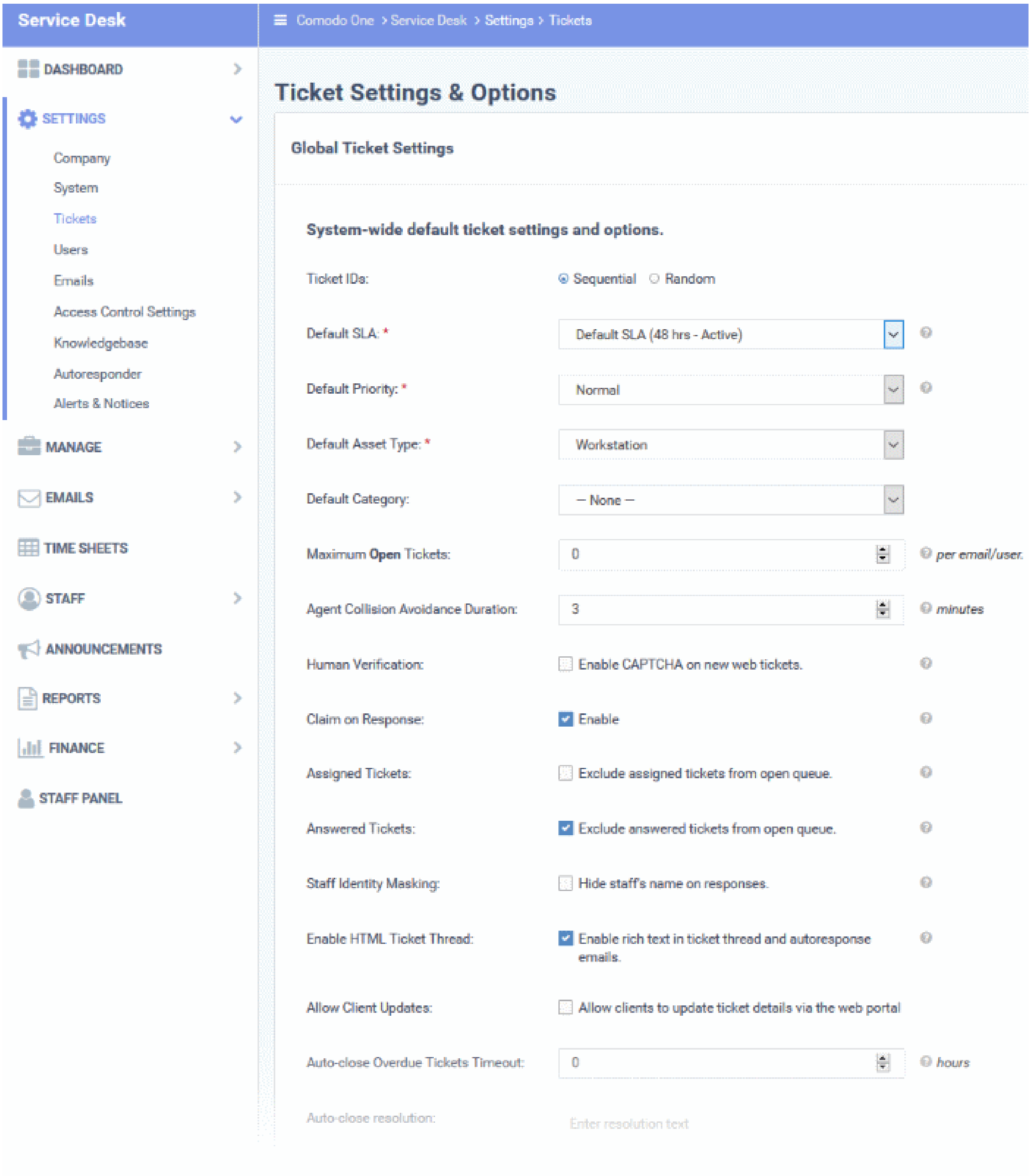
- Select your default user registration setting and click 'Save Changes'.

2.2.5 Email Settings and Options

- Click 'Admin Panel' > 'Settings' > Emails'
- The 'Email Settings & Options' interface lets you configure overall settings for system emails.
- Please note these global email settings can be overridden by settings at the department level.

To configure Service Desk Email Settings

- Make sure you are in the 'Admin Panel' (see the last link on the left)
- Click 'Settings' on the left then 'Emails'



Email Settings

- **Default Template Set**: Service Desk allows administrators to create and manage different email template sets for different customers, with each set consisting of templates for different types of email messages sent for various ticket activities. See **Email Templates** for more details. Administrators can choose which template set has to be used by default, from the Default Template Set drop-down. Please note that departments can be assigned a different email template set. See **Departments** for more details. See **Email Templates** about how to add/modify email templates.
- **Default System Email:** Select the default outgoing email address from which the emails are sent. Please note that departments can configure a different email address. See **Departments** for more details. See **Email Addresses** about how to add/modify email addresses.
- **Default Alert Email:** Select the default email address from which Alerts & Notices are sent to the admins/staff members. See **Email Addresses** about how to add/modify email addresses.

- **Admin's Email Address:** Enter the administrator's email address to which the System Errors and New Tickets alerts are sent. Please note this should be enabled in Alerts & Notices screen. See **Configuring Alerts and Notices** for more details.

Incoming Emails

- **Email Fetching:** Enabling this checkbox will allow IMAP/POP polling for configured and enabled Mail Boxes. See **Email Addresses** about how to enable fetching email via IMAP or POP.
- **Strip Quoted Reply:** If enabled, all previous correspondences in the email will be removed. If this feature is disabled, then the next setting Reply Separator Tag will be relevant.
- **Reply Separator Tag**: This is relevant only if the above Strip Quoted Reply is disabled. The text '---reply above this line---' will be displayed between the quoted original message and the reply. You can edit the separator line text in the text box.
- **Emailed Tickets Priority**: If enabled, tickets sent over email will have their priority set by the sender's email client.'
- **Accept All Emails:** If enabled, tickets can be raised by unregistered users also.
- **Accept Email Collaborators**: If enabled, email participants are included in the 'To' and 'CC' fields as ticket collaborators. Staff members can also add collaborator manually when viewing a ticket. See **Managing Tickets** for more details.

Outgoing Emails

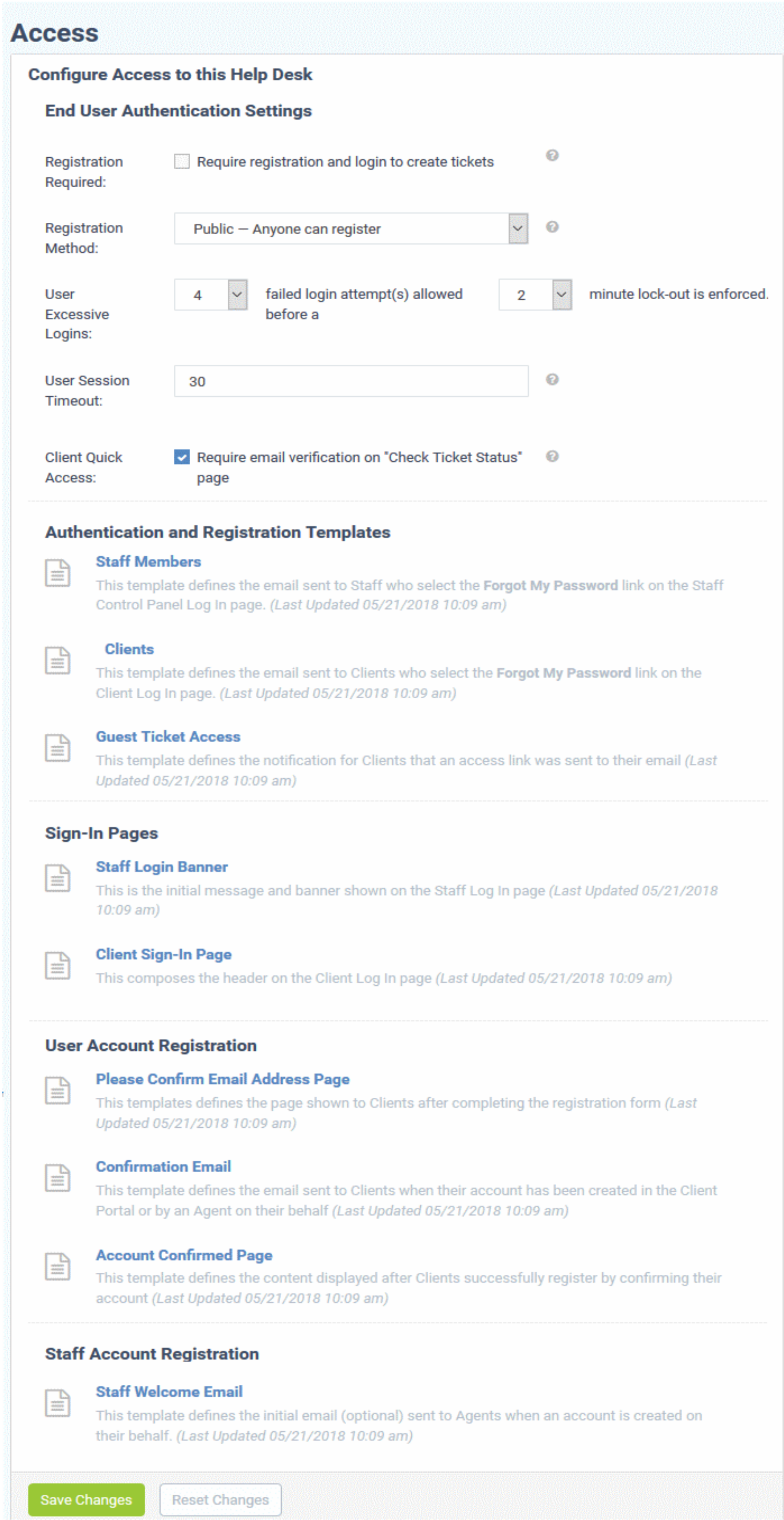
- Default MTA: Select the mail address whose Mail Transfer Agent (MTA) settings should apply to outgoing emails that do not have an SMTP setting.

Click the 'Save Changes' button to apply your changes.

2.2.6 Access Control Settings

The 'Access Control Settings' interface allows admins to configure the password policy for staff members, authentication settings for end users, and email templates for 'Forgot My Password' links. You can also configure settings for user account registration, staff account registration and banners for log-in pages.

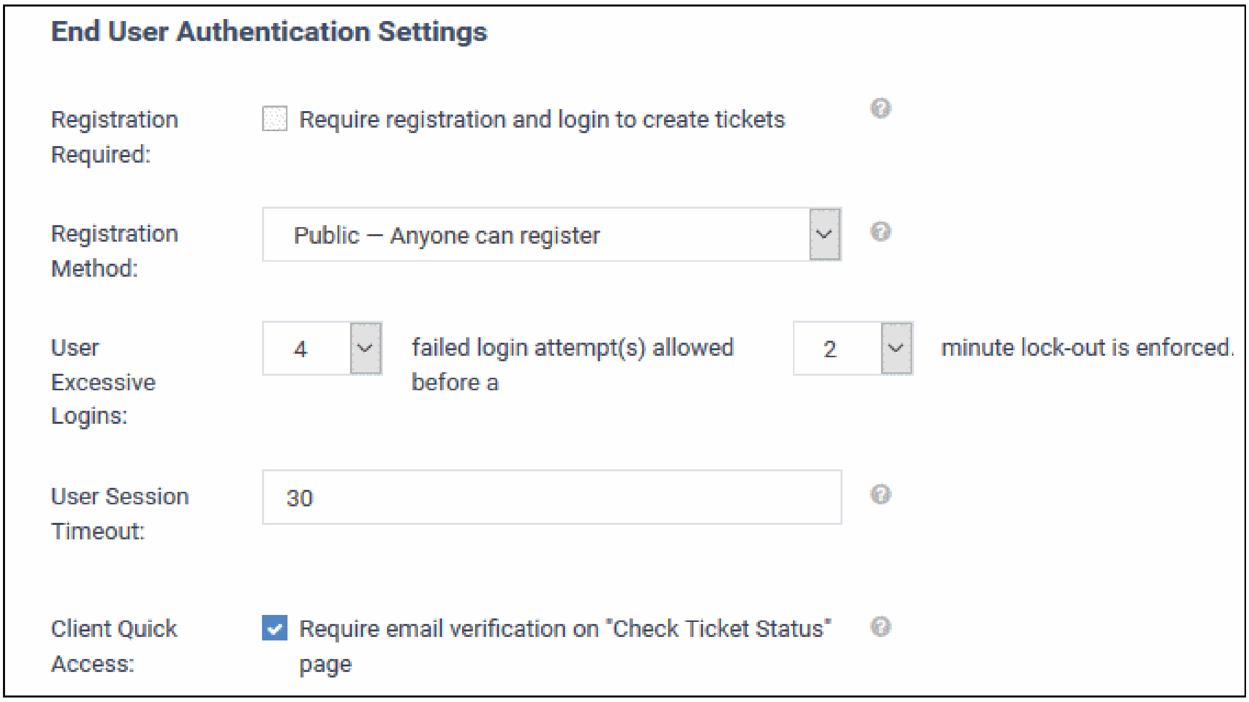
- Open the Admin Panel
- Click 'Settings' on the left then 'Access Control Settings'


Access
Configure Access to this Help Desk
End User Authentication Settings
Registration Required:
Require registration and login to create tickets
Registration Method:
Public — Anyone can register
User Excessive Logins:
4
failed login attempt(s) allowed before a
2
minute lock-out is enforced.
User Session Timeout:
30
Client Quick Access:
Require email verification on "Check Ticket Status" page
Authentication and Registration Templates
Staff Members
This template defines the email sent to Staff who select the Forgot My Password link on the Staff Control Panel Log In page. (Last Updated 05/21/2018 10:09 am)
Clients
This template defines the email sent to Clients who select the Forgot My Password link on the Client Log In page. (Last Updated 05/21/2018 10:09 am)
Guest Ticket Access
This template defines the notification for Clients that an access link was sent to their email (Last Updated 05/21/2018 10:09 am)
Sign-In Pages
Staff Login Banner
This is the initial message and banner shown on the Staff Log In page (Last Updated 05/21/2018 10:09 am)
Client Sign-In Page
This composes the header on the Client Log In page (Last Updated 05/21/2018 10:09 am)
User Account Registration
Please Confirm Email Address Page
This templates defines the page shown to Clients after completing the registration form (Last Updated 05/21/2018 10:09 am)
Confirmation Email
This template defines the email sent to Clients when their account has been created in the Client Portal or by an Agent on their behalf (Last Updated 05/21/2018 10:09 am)
Account Confirmed Page
This template defines the content displayed after Clients successfully register by confirming their account (Last Updated 05/21/2018 10:09 am)
Staff Account Registration
Staff Welcome Email
This template defines the initial email (optional) sent to Agents when an account is created on their behalf. (Last Updated 05/21/2018 10:09 am)
Save Changes
Reset Changes

Click the following links for more details on each category:

- **End User Authentication Settings**
- **Authentication and Registration Templates**
- **Sign-In Pages**
- **User Account Registration**
- **Staff Account Registration**

End User Authentication Settings



- **Registration Required** and **Registration Method** are used together to configure how users register and access the web portal of your help desk. The following table summarizes how the two settings work together:

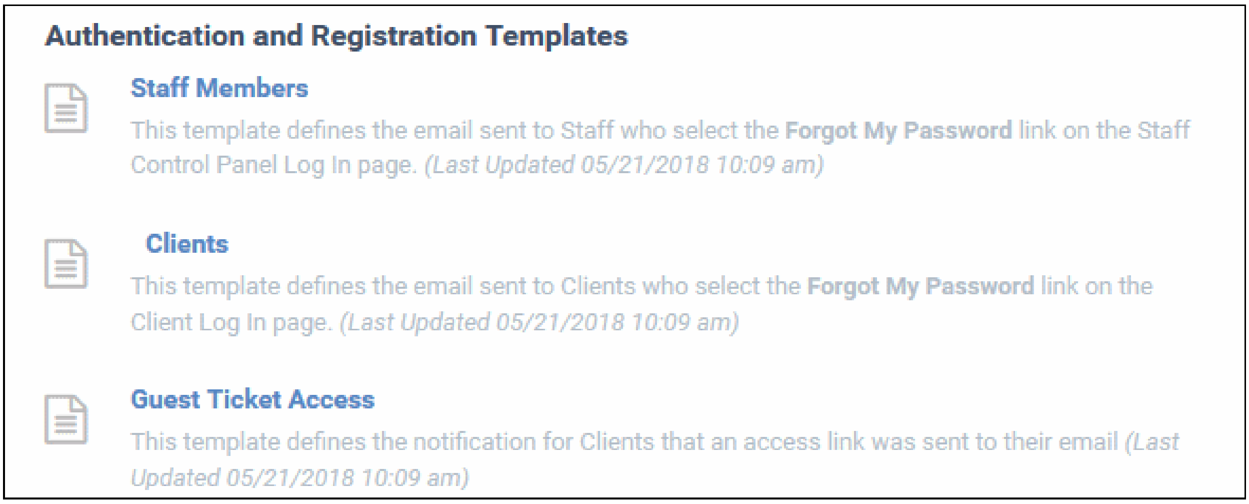
Registration Required	Registration Method	Result
No	Public	Registration is not required to create support tickets. Registration is, however, available and encouraged.
Yes	Public	Users must register to create support tickets.
No	Private	Anyone can create a ticket. Only staff members can register accounts.
Yes	Private	Users can only submit tickets after registering. Registration is by invitation only.
No	Disabled	No one can register for an account,

		but anyone can create a ticket.
Yes	Disabled	Users must register to submit tickets, but registration is disabled. Effectively disables new tickets via the web portal.

- **User Excessive Logins:** Select the number of times a failed logins attempts is allowed for users from the first option. If the number of failed login attempts exceeds this number, the user account will be temporarily locked. You can specify the lockout period by choosing it from the second drop-down.
- **User Session Timeout:** Enter the maximum idle time in minutes before a user is required to log in again. Enter 0 if no timeout is required.
- **Client Quick Access:** If disabled, the users can immediately access their tickets via the 'Check Ticket Status' login page. If enabled, users will be required to receive an email and follow a link in the mail to view the ticket. Disabling email verification might allow third parties (e.g. ticket collaborators) to impersonate the ticket owner).

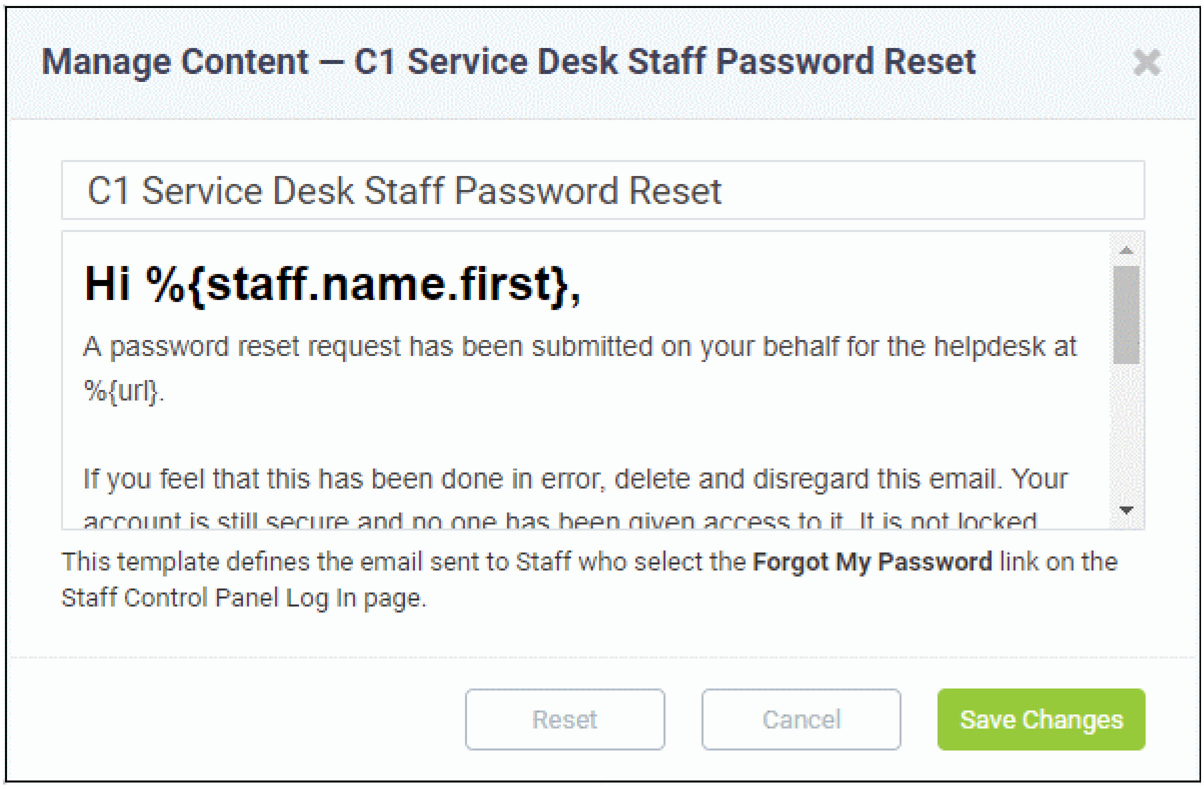
Authentication and Registration Templates

This section allows admins to edit the templates of emails that are sent to staff members and clients. You can also edit the template of the mail sent to guests to access their tickets.



Staff Members

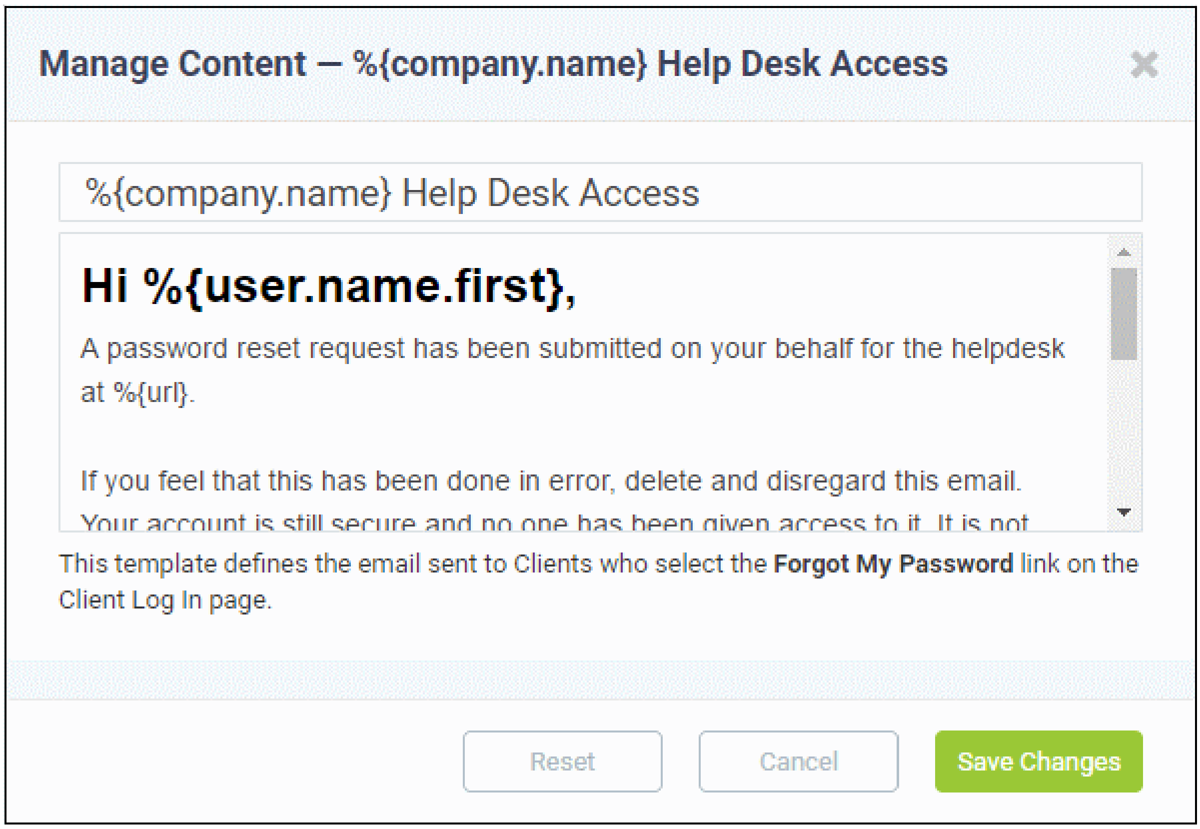
- Click the 'Staff Members' link to edit the template of the forgotten password mail sent to staff:



- Edit the template as required and click 'Save Changes'. Make sure the variables defined in the template are correct.

Clients

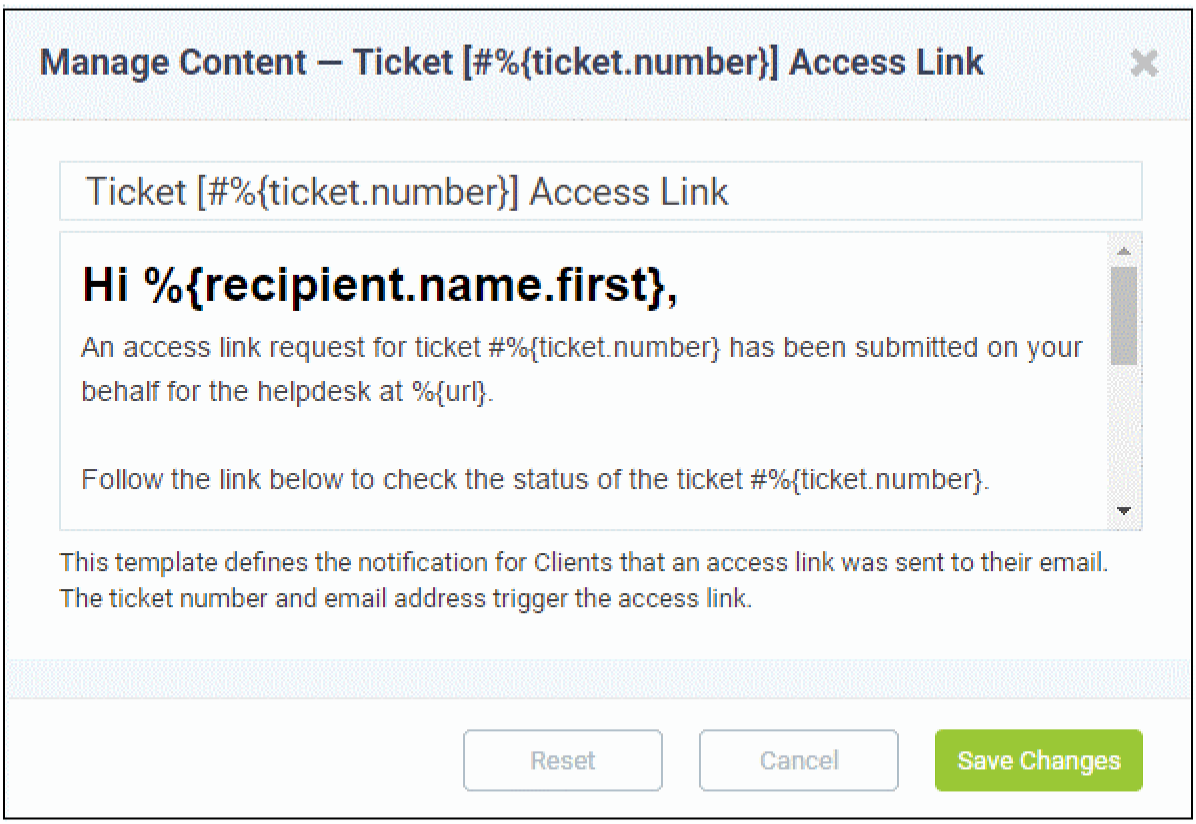
- Click the 'Clients' link, to edit the template of the forgotten password mail sent to clients:



- Edit the template as required and click 'Save Changes'. Make sure the variables defined in the template are correct.

Guest Ticket Access

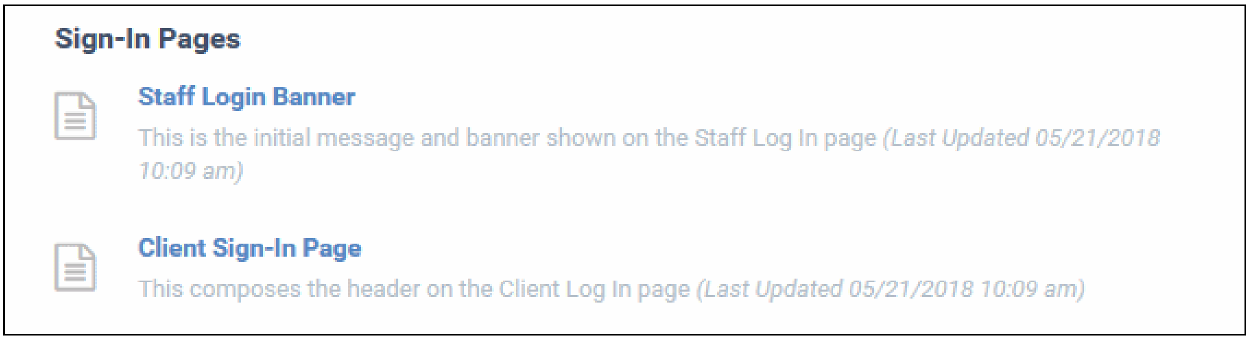
- Click the 'Guest Ticket Access' link, to edit the template of email notification that is sent to clients with access link to their tickets,



- Edit the template as required and click 'Save Changes'. Make sure the variables defined in the template are correct.

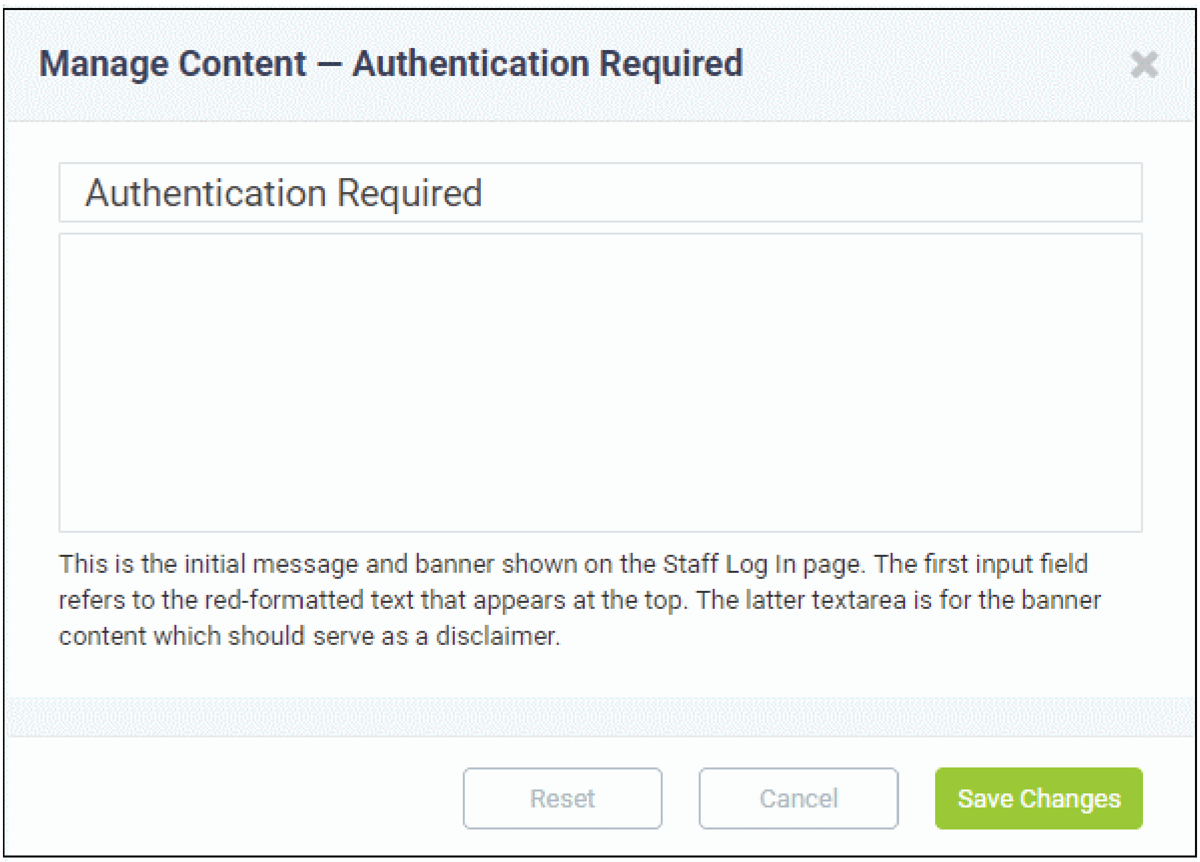
Sign-In Pages

This section allows administrators to edit the message and banner displayed on the staff member's Log In page and Client Sign-In page.



Staff Login Banner

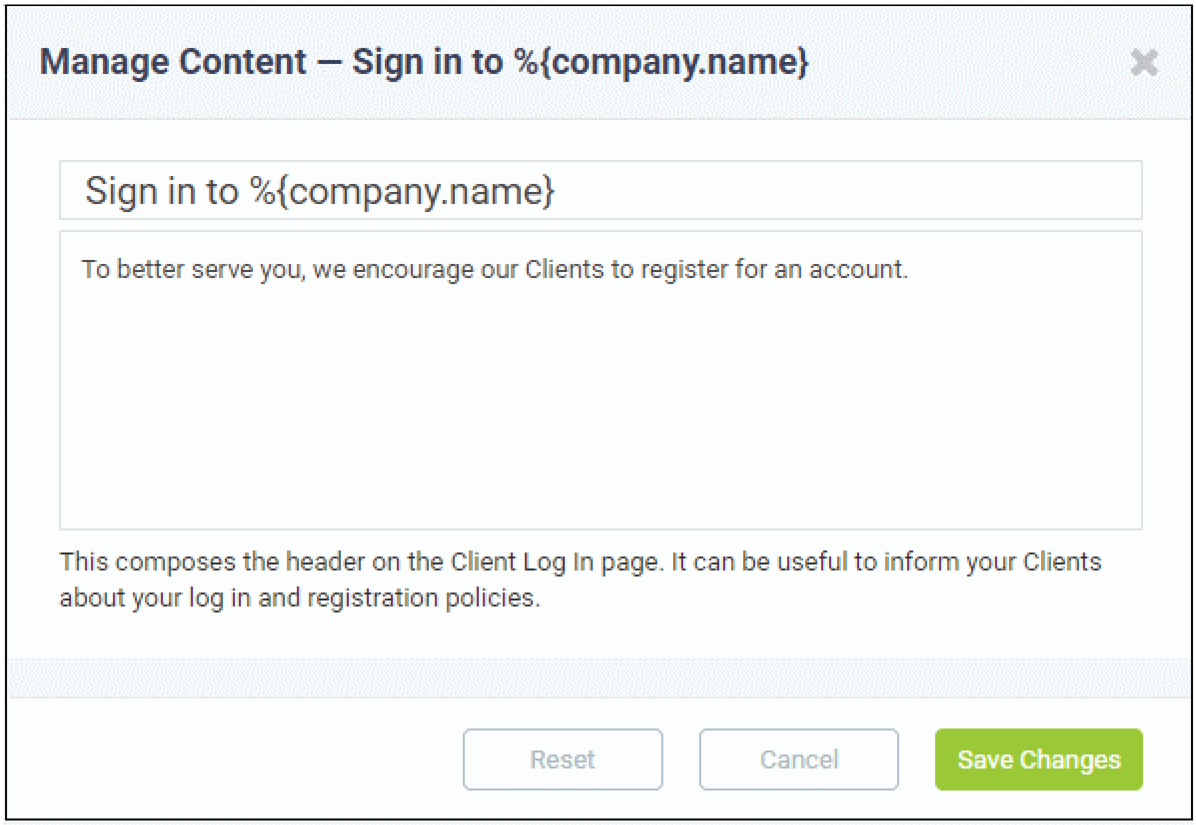
- Click the 'Staff Login Banner' link, to edit the message shown on the 'Staff Log In' page



- Edit the message as required. The text entered in the first field appears as red text at the top. The text area serves for the banner content.
- Click 'Save Changes' for the changes to take effect.

Client Sign-In Page

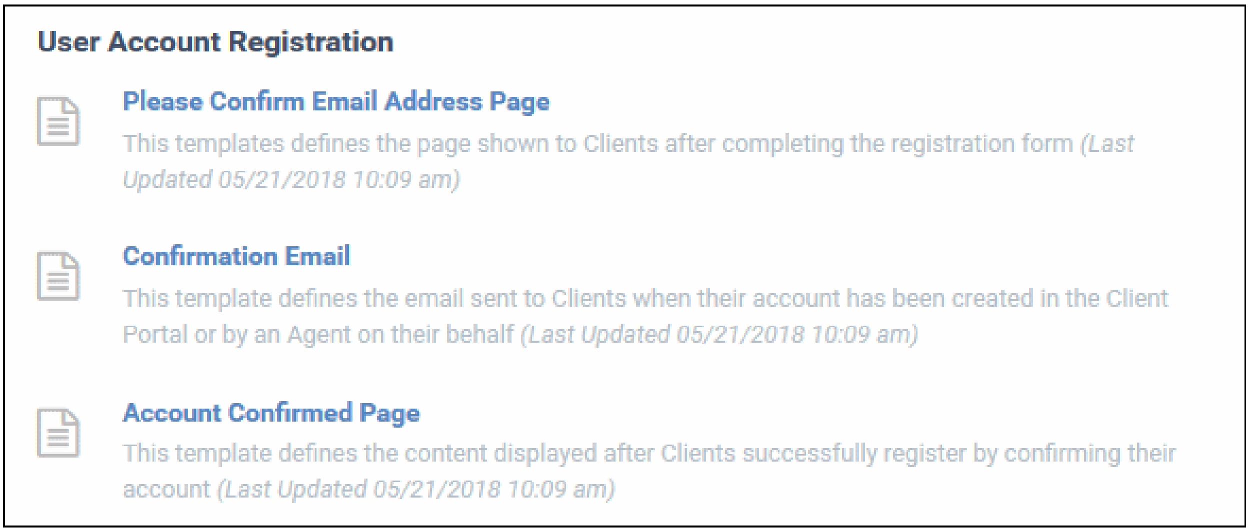
Click the 'Client Sign-In Page' link, to edit the header shown on the Client Log In' page



- Edit the message as required. The text entered in the first field appears as blue text below the menu bar. The text area serves for providing other information.
- Click 'Save Changes' for the changes to take effect.

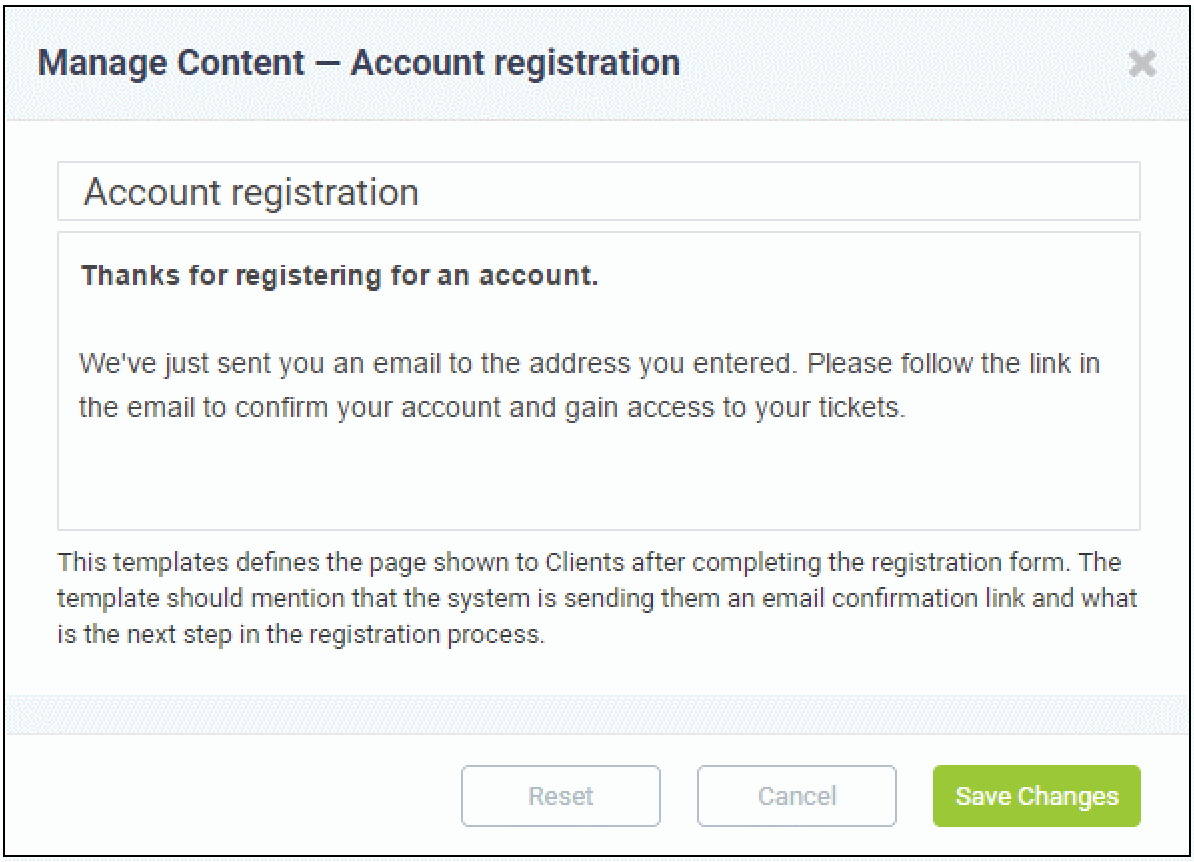
User Account Registration

This section allows you to edit the email templates that are sent to users for confirming their email address, account creation and account confirmed emails.



Confirm Email Address Page

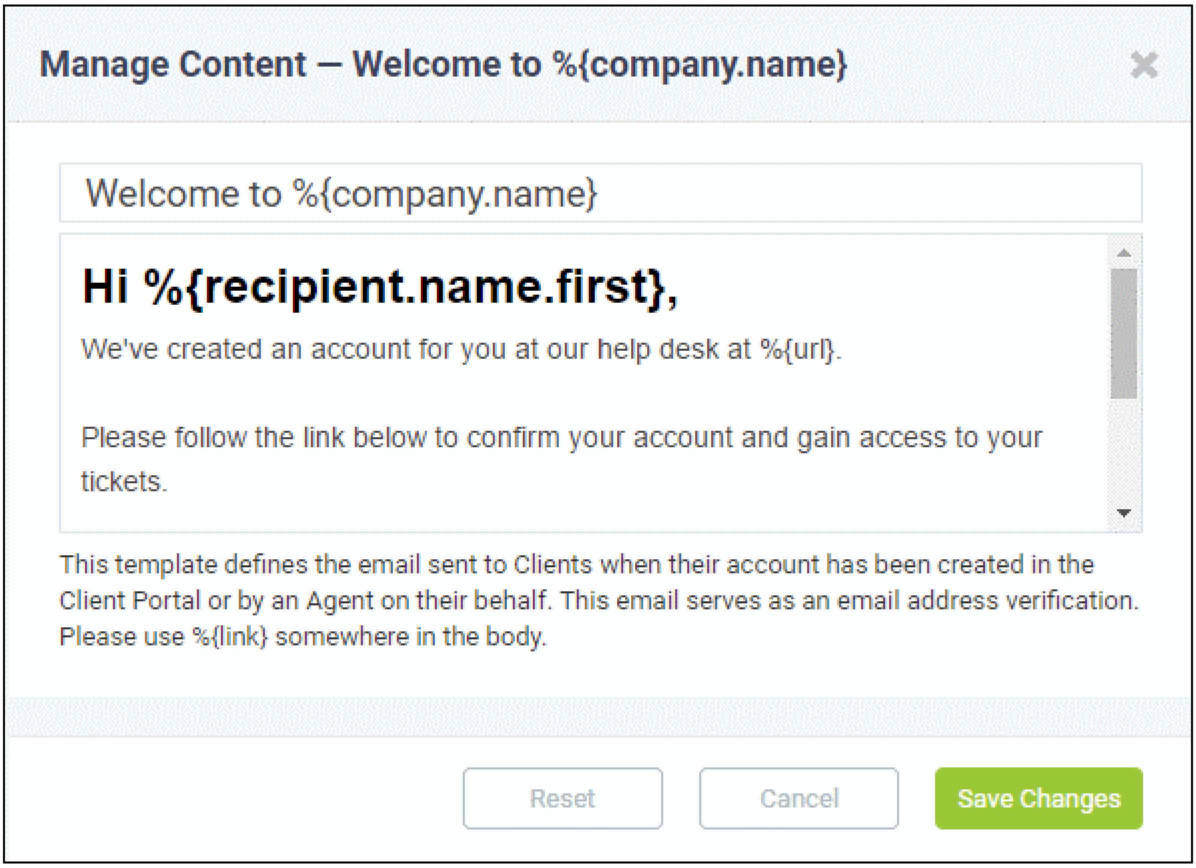
Click the 'Please Confirm Email Address Page' link, to edit the template of email that is sent to users after completing the registration form.



- Edit the message as required. Make sure to mention that the C1 Service Desk system is sending them a confirmation email link and the next steps for completing the registration process.
- Click 'Save Changes' for the changes to take effect.

Confirmation Email

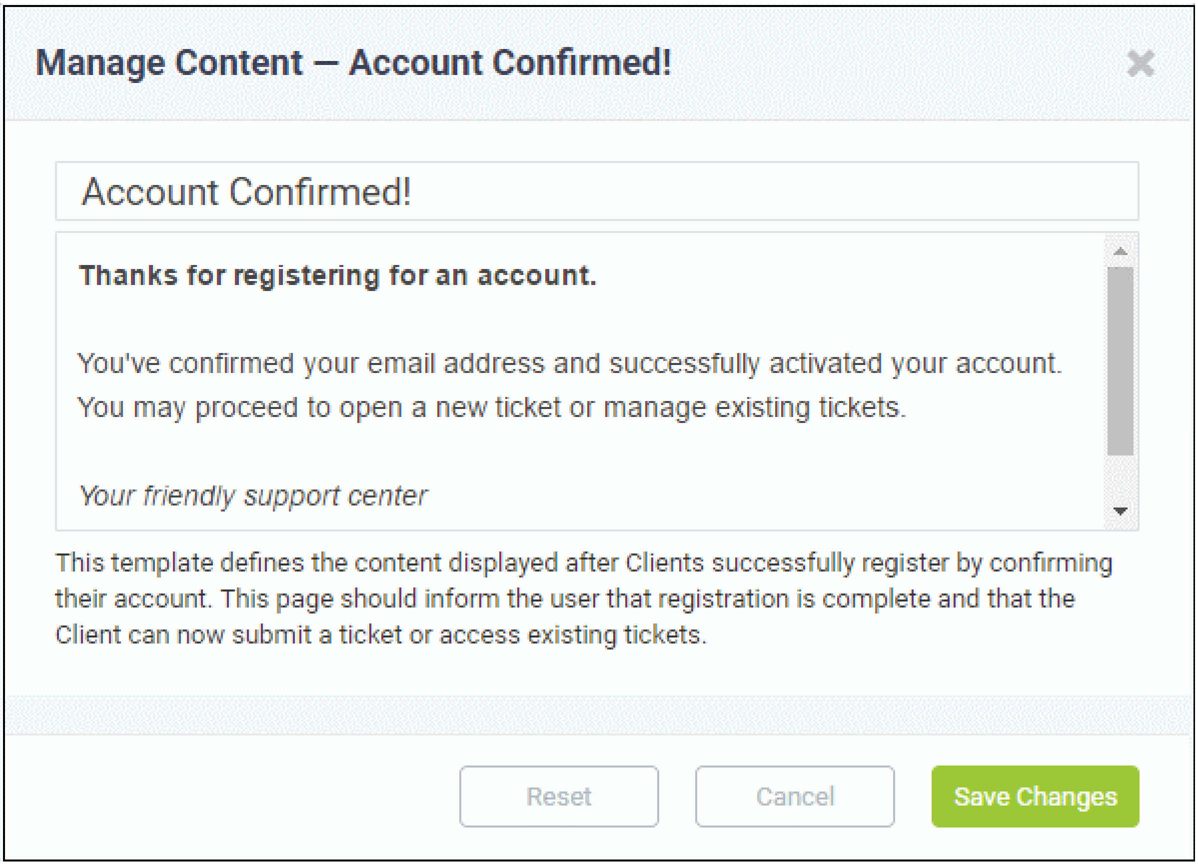
- Click the 'Confirmation Email' link, to edit the template of email that is sent to users after their account has been created.



- Edit the template as required and click 'Save Changes'. Make sure the variables defined in the template are correct.

Account Confirmed Page

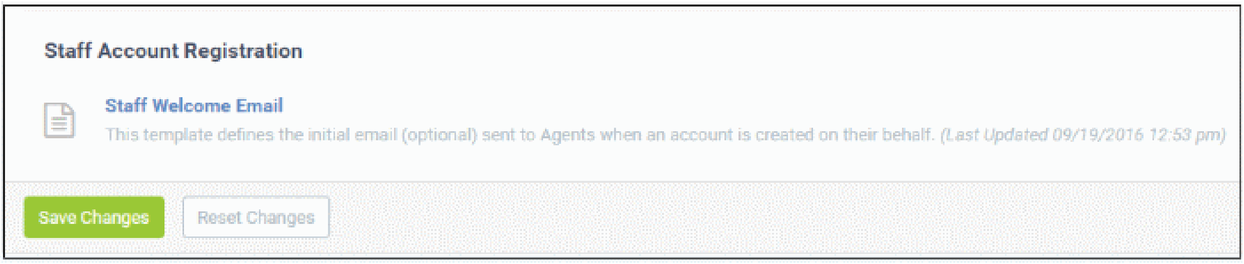
- Click the 'Account Confirmed Page' link, to edit the template of email that is sent to users after their account has been successfully registered.



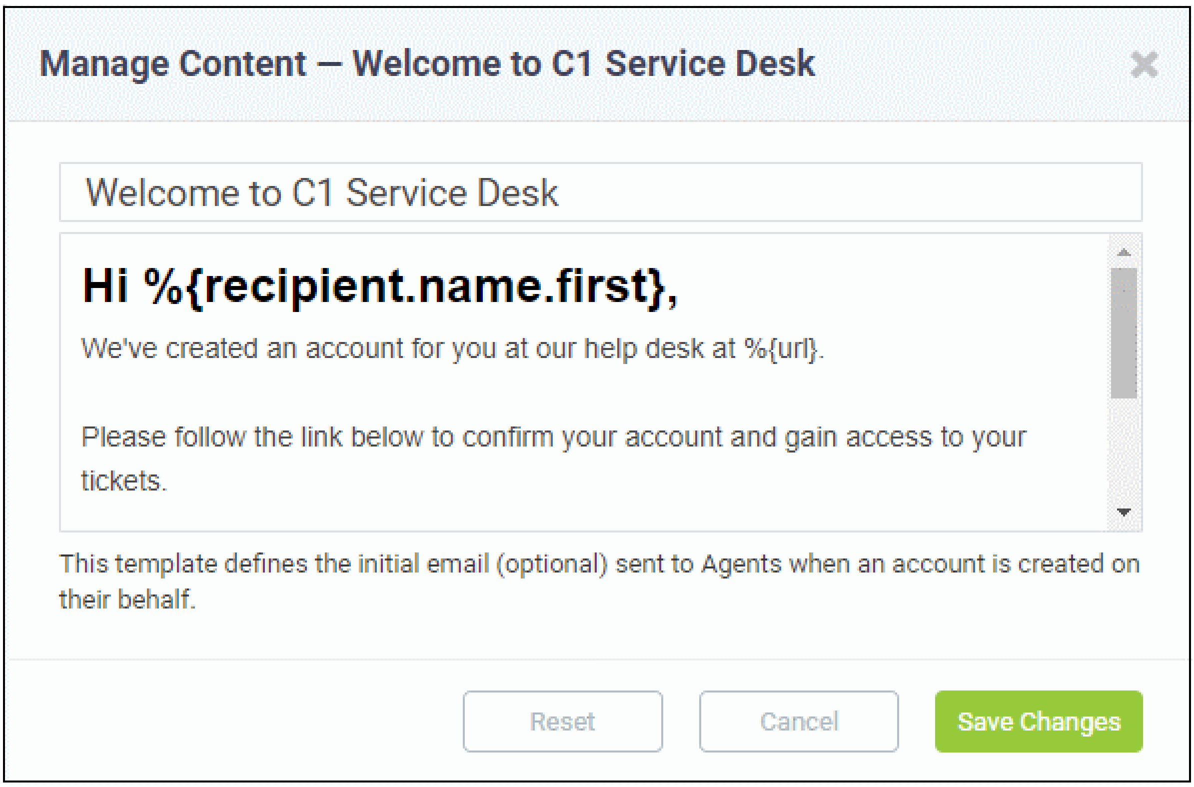
- Edit the template as required and click 'Save Changes'. Make sure the variables defined in the template are correct.

Staff Account Registration

This section allows administrators to edit the email template that is sent to Staff Members whose account is created by an administrator. This welcome email is optional and is configured in the 'Staff Members' page. See **Staff Members** for more details.



- Click the 'Staff Welcome Email' link, to edit the template of welcome email that is sent to staff members after their account has been successfully created by an administrator



- Edit the template as required and click 'Save Changes'. Make sure the variables defined in the template are correct.
    - Click 'Save Changes' at the bottom of the screen for the access control settings to take effect.

2.2.7 Knowledge Base Settings and Options

- Click 'Admin Panel' > 'Settings' > 'Knowledgebase'

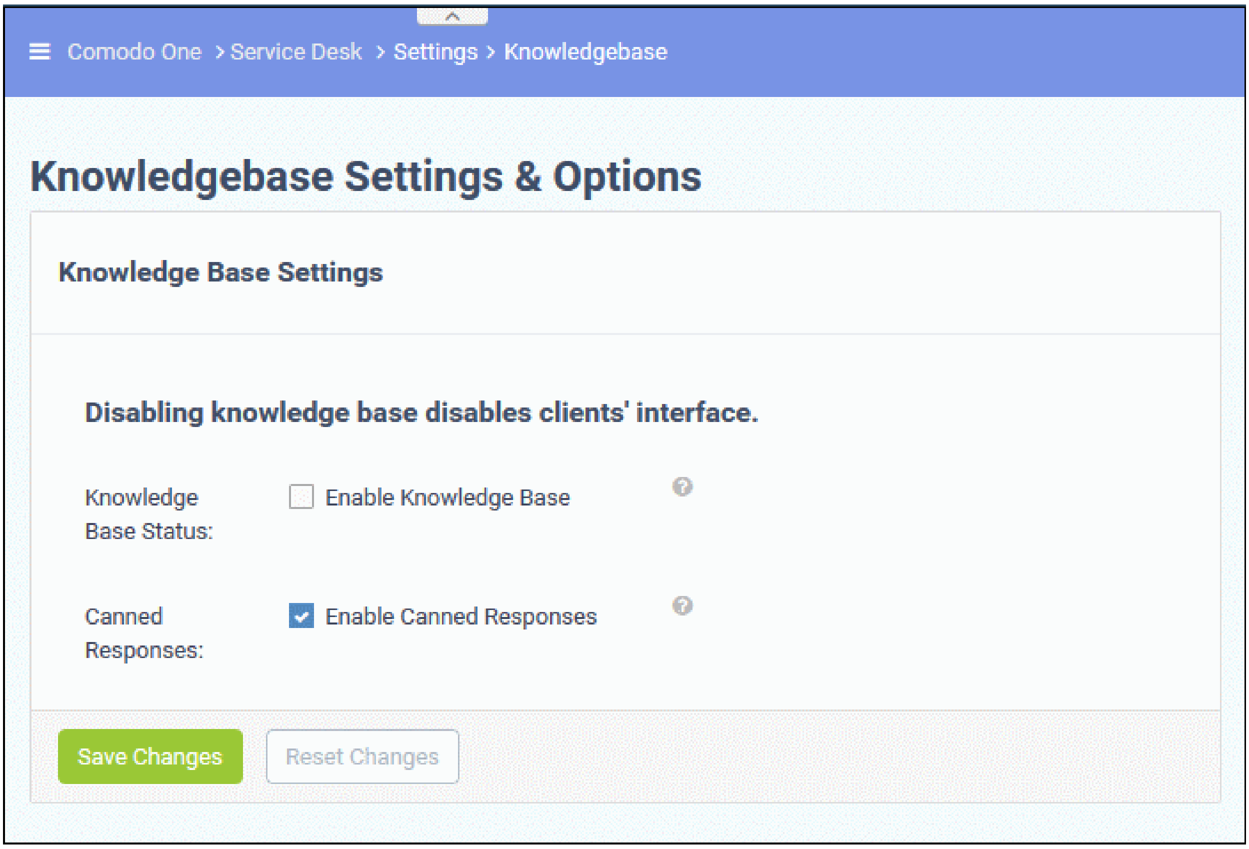
Admins and staff can create FAQs which can be published in the client portal for end-users.

FAQs help end-users find answers for frequently encountered problems. Apart from improving your customer service, this also means support staff can prioritize their time more effectively.

- FAQs can be made available for everyone, or only to admin/staff members. See **Managing Knowledgebase** for a description on how create FAQs.
- The settings in this interface determine whether or not the 'Knowledgebase' tab will be available in the user web portal.
- Administrators can also configure whether 'Canned Responses' should be made available.

To configure knowledge-base settings

- Make sure you are in the 'Admin Panel' (see the last link on the left)
- Click 'Settings' on the left then 'Knowledgebase'



- **Knowledge Base Status:** Makes FAQs available under the 'Knowledgebase' tab in the client portal. See **Managing Knowledgebase** for help to create categories and FAQs.
- **Canned Responses:** If enabled, admins and staff can use canned responses when replying to tickets. See **Canned Responses** for more details.
    - Click 'Save Changes' to apply your changes.

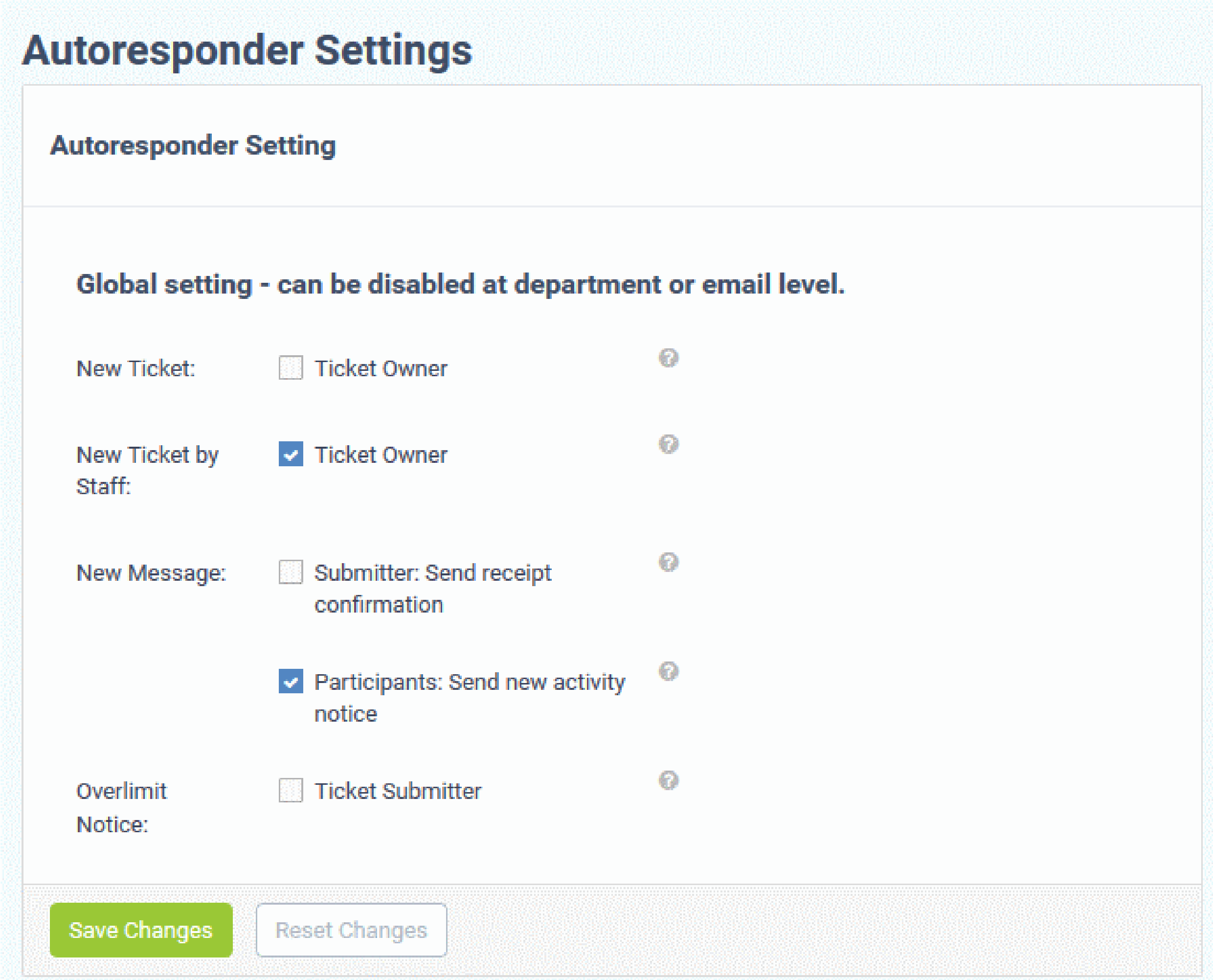
Note: Any setting/change you make in this interface will be added to Comodo One audit logs. You can view audit logs in the C1 portal ('Management' > 'Audit Logs'). See **https://help.comodo.com/topic-289-1-716-12456-View-Audit-Logs.html** for more details.

2.2.8 Autoresponder Settings

The Autoresponder Settings screen allows administrators to configure email auto-response settings for automated emails sent to users actions such as when a new ticket is raised, a new ticket is raised by an admin/staff member on their behalf, a new message is appended to an existing ticket and when the number of maximum open tickets is exceeded. This global setting can be disabled at department level or email level. See **Departments** and **Email Addresses** for more details about their respective auto-response settings.

The email messages will be sent to the agents/staff with the message templates and other parameters as configured in the 'Email Settings and Options' interface. See **Email Settings and Options** for more details.

- Open the 'Admin Panel'
- Click 'Settings' on the left then 'Autoresponder'



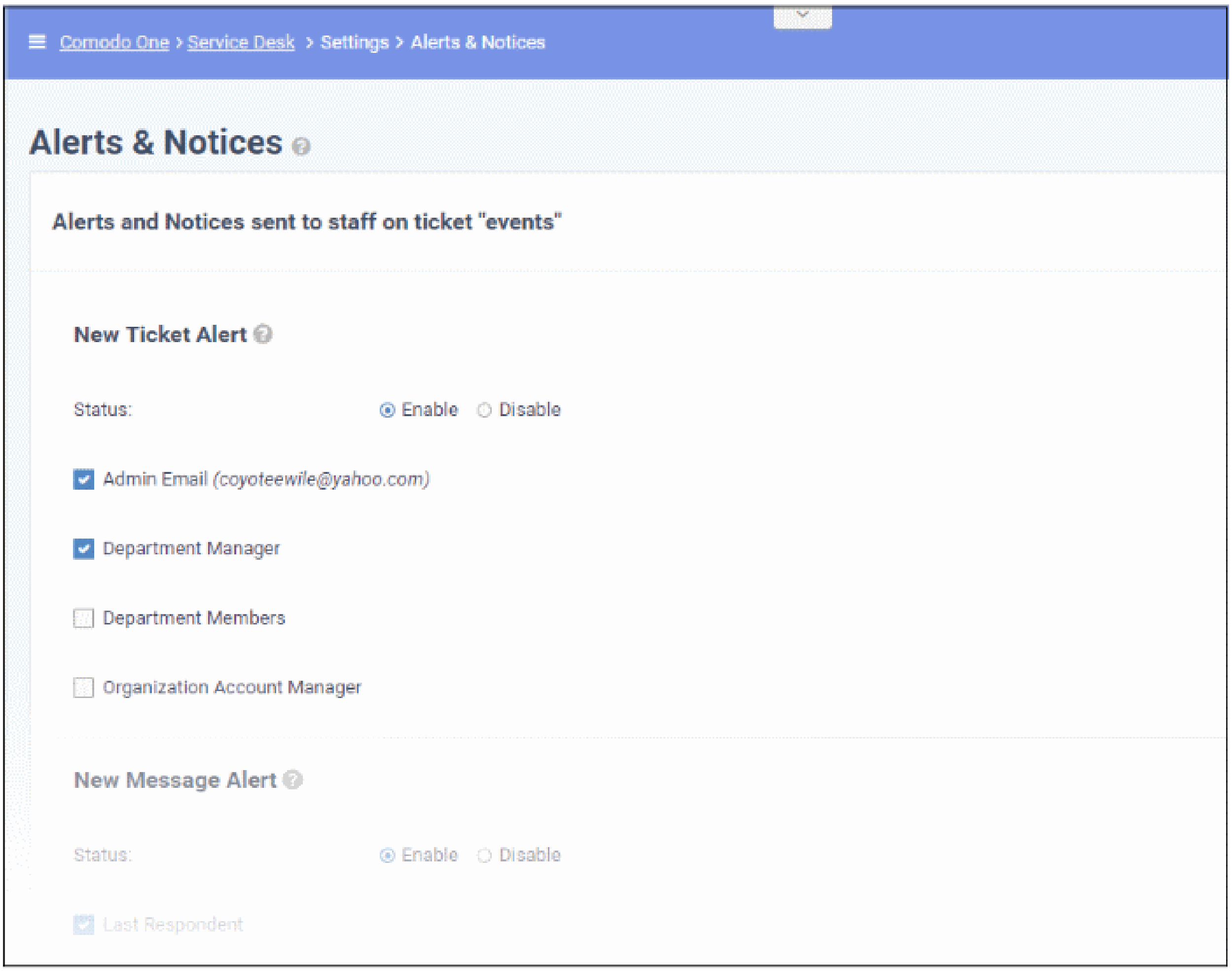
- **New Ticket:** If enabled, an autoresponse email will be sent to the ticket owner when a new ticket is raised by them. Please note the setting done in the **Ticket Category** screen overrides the setting done here.
- **New Ticket by Staff:** If enabled, an automatic email will be sent to the user when a ticket raised on behalf of him/her. The admin/staff member can choose to disable this option when creating new tickets. See **New Ticket** for more details.
- **New Message**
  - **Submitter: Send receipt confirmation:** If enabled, confirmation notice is sent when a new message is appended to an existing ticket.
  - **Participants: Send new activity notice:** If enabled, messages from submitter are sent to all participants on a ticket.
- **Overlimit Notice**: If enabled, 'Ticket Denied' notice will be sent to the user when the number of tickets raised by them and yet to be attended, exceeds the limit set as the Maximum Open Tickets parameter. See **Ticket Settings and Options** for more details.
    - Click 'Save Changes' at the bottom of the screen for the settings done in the page to take effect.

2.2.9 Configure Alerts and Notices

- Click 'Admin Panel' > 'Settings' > 'Alerts & Notices'
- The 'Alerts & Notices' screen lets you configure alerts for staff when specific events occur. Example events include when a new ticket is created, when a ticket is overdue and when a new internal note is added.
- Alerts are sent as emails and use the templates and settings specified in 'Email Settings and Options'. See **Email Settings and Options** for more details.

Note: Any setting/change you make in this interface will be added to Comodo One audit logs. You can view audit logs in the C1 portal ('Management' > 'Audit Logs'). See **https://help.comodo.com/topic-289-1-716-12456-View-Audit-Logs.html** for more details.

- Open the 'Admin Panel'
- Click 'Settings' on the left then 'Alerts & Notices'



- **New Ticket Alert:** Alerts will be sent to the selected persons when a new ticket is created. Please note the alert will not be sent to admins/staff members for the tickets that are auto-assigned via Ticket Category or Ticket Filter. See **Ticket Categories** and **Ticket Filters** for more details. The 'Status' option should be enabled for the settings to take effect.
- **New Message Alert:** Alerts will be sent to the selected persons when a new message is added to an existing ticket by the user. The 'Status' option should be enabled for the settings to take effect.
- **New Internal Note Alert:** Alerts will be sent to the selected persons when a new internal note is added to a ticket. The 'Status' option should be enabled for the settings to take effect.
- **Ticket Assignment Alert:** Alerts will be sent to the selected persons when a new ticket is assigned to them. The 'Status' option should be enabled for the settings to take effect.
- **Ticket Close Alert:** An alert will be sent to the selected persons when a ticket is closed. By default this setting is disabled.
- **Ticket Transfer Alert:** Alerts will be sent to the selected persons when a ticket is transferred from one department to another. The 'Status' option should be enabled for the settings to take effect.
- **Overdue Ticket Alert:** Alerts will be sent to the selected persons when a ticket breaches the SLA for the ticket. The 'Status' option should be enabled for the settings to take effect. Fore more details about SLAs,

see **Service Level Agreements**.

- **System Alerts:** System error alerts, SQL error alerts and excessive failed login attempt alerts will be sent to the administrator. The administrator's email address is set in the **Emails Settings and Options** screen.
    - Click 'Save Changes' at the bottom of the screen for the settings done in the page to take effect.

2.2.10 Configure Two Factor Authentication

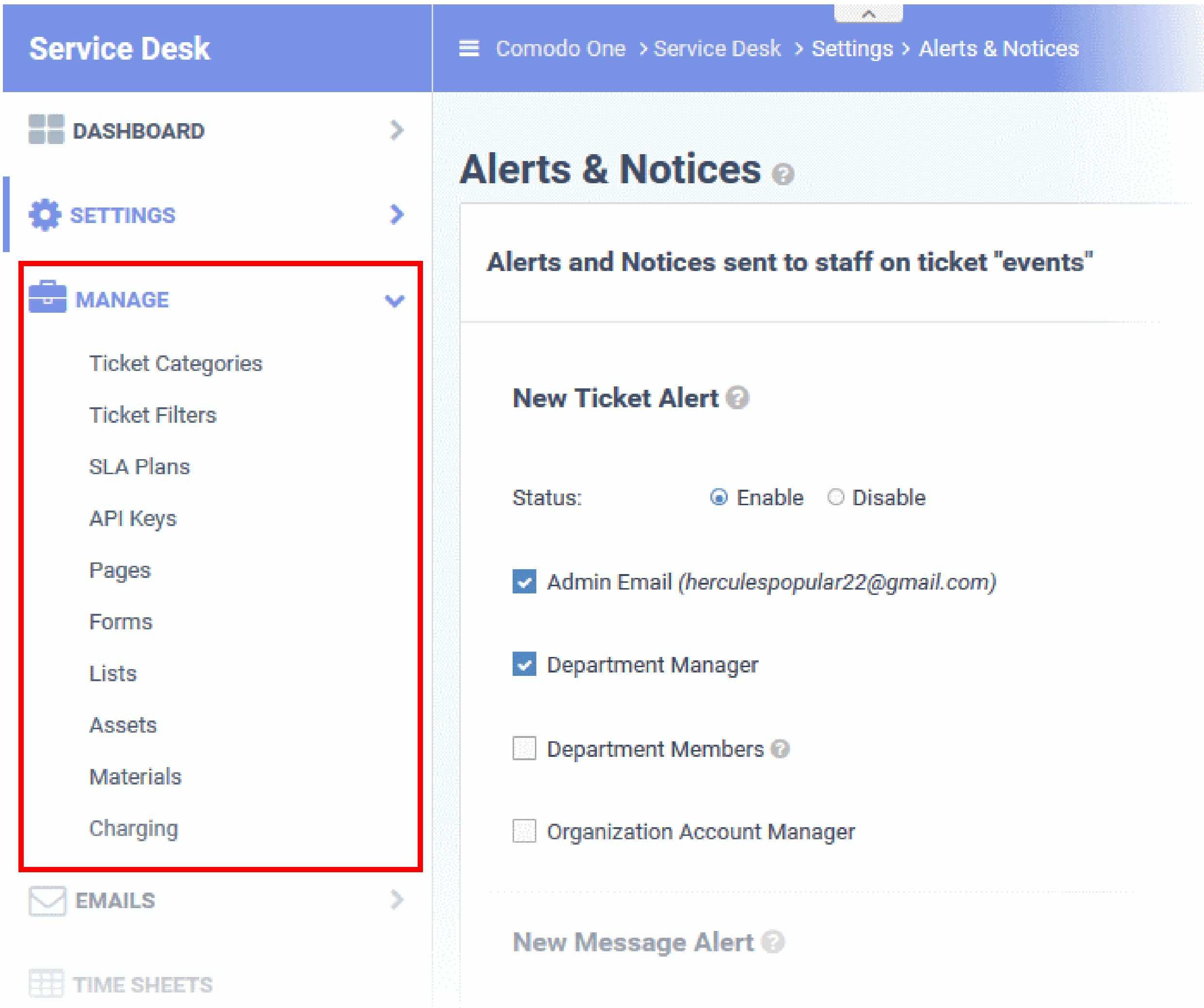
Two-factor authentication increases login security by requiring staff to present additional verification before they can access the service desk interface. Once setup, staff will need to enter a unique verification code in addition to their regular login credentials.

- Two factor authentication can be activated in the Comodo One application by clicking 'Management' > 'Account Security Details'.
- See **Setting up Two-Factor Login Authentication** in the C1 admin guide for help with this.

2.3 Manage Service Desk Components

The 'Manage' tab allows administrators to manage various components such as Ticket Categories, Ticket Filters, SLA Plans and more, that determine how the overall C1 Service Desk application should function. For example, Ticket categories that should be available for selection in the client portal can be created, managed and configured to assign a ticket to a specific staff member automatically from this interface.

- To configure service desk components, click 'Manage' on the left of the admin panel



Click the following links to find out more about each component:

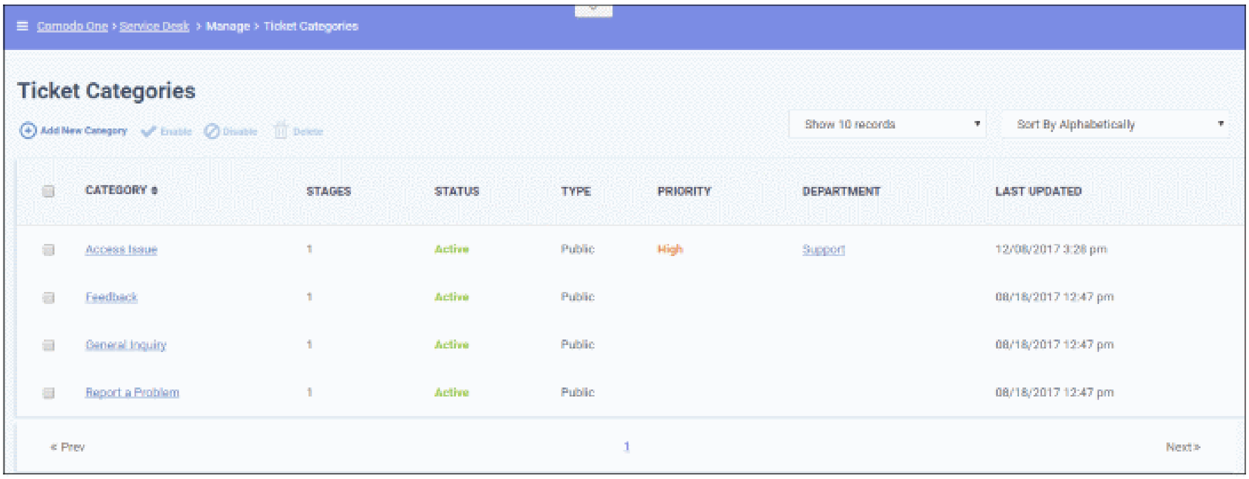
- **Ticket Categories:** The ticket categories that are made public are visible in the client portal used for raising tickets by end users. This helps to gather information from the user and to route tickets automatically to a particular department or an admin/staff member. See **Ticket Categories** for more details
- **Ticket Filters:** Create and manage rules based filters for the tickets and define the action to be taken for them. See **Ticket Filters** for more details.
- **SLA Plans:** Service Level Agreement (SLA) plans define the period before which a ticket should be attended and closed. Administrators can also configure warning level alerts if a SLA is breached. See **Service Level Agreements** for more details.
- **API Keys:** C1 Service Desk allows new tickets to be submitted via Application Programming Interface (API). API keys are generated and used to authenticate clients that are submitting new tickets via API route. See **API Keys** for more details.
- **Pages:** Add new site pages and configure them to be displayed as Landing Page, Offline Page and Thank-You Page. See **Client Portal Pages** for more details.
- **Forms:** Add new custom forms that will be visible in the client portal for users to input relevant data so that the tickets can be automatically routed to appropriate department or an admin/staff member. See **Forms** for more details.
- **Lists:** Create drop-down boxes with predefined options that can be added to a Custom Form and in a Ticket Filter. See **Custom Lists** for more details.
- **Assets**: Set hourly charge-rate for items or services that are fixed by support team.
- **Materials**: Add and manage materials like components, consumables and/or other expense types for adding to tickets.
- **Charging** - Create and manage charging plans with custom hourly rates for different types of services. Charging plans can be applied to service contracts associated with customers, to applying service charges for service sessions, that are not covered by pre-paid hours defined in the contract. See **Manage Charging Plans** for more details.

2.3.1 Ticket Categories

- 'Ticket Categories' are help topics that are presented to end-users to help them more easily select the area with which they need assistance. For example, your help page might have a menu which says 'Please select the area we can help you with', and offer categories such as 'Billing', 'Account Changes', 'Technical Support' and so forth.
- When combined with custom forms, ticket categories can be used to gather better, more targeted information from end-users.
- Ticket categories can also be used to route tickets to the appropriate entity and to setup specific auto-responders and thank-you pages.

To open the 'Ticket Categories' interface

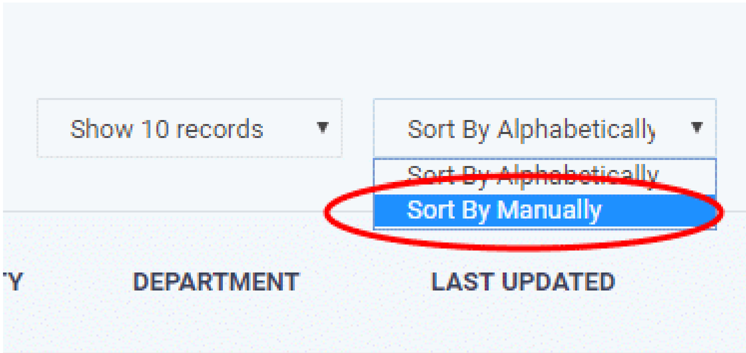
- Click 'Manage' on the left then 'Ticket Categories' in the Admin Panel



The screen allows you to add new ticket categories, edit existing categories and sort them manually or alphabetically.

Sorting items

The default sorting mode is 'Alphabetically'. Manual sorting allows you to drag and re-order the rows as required:

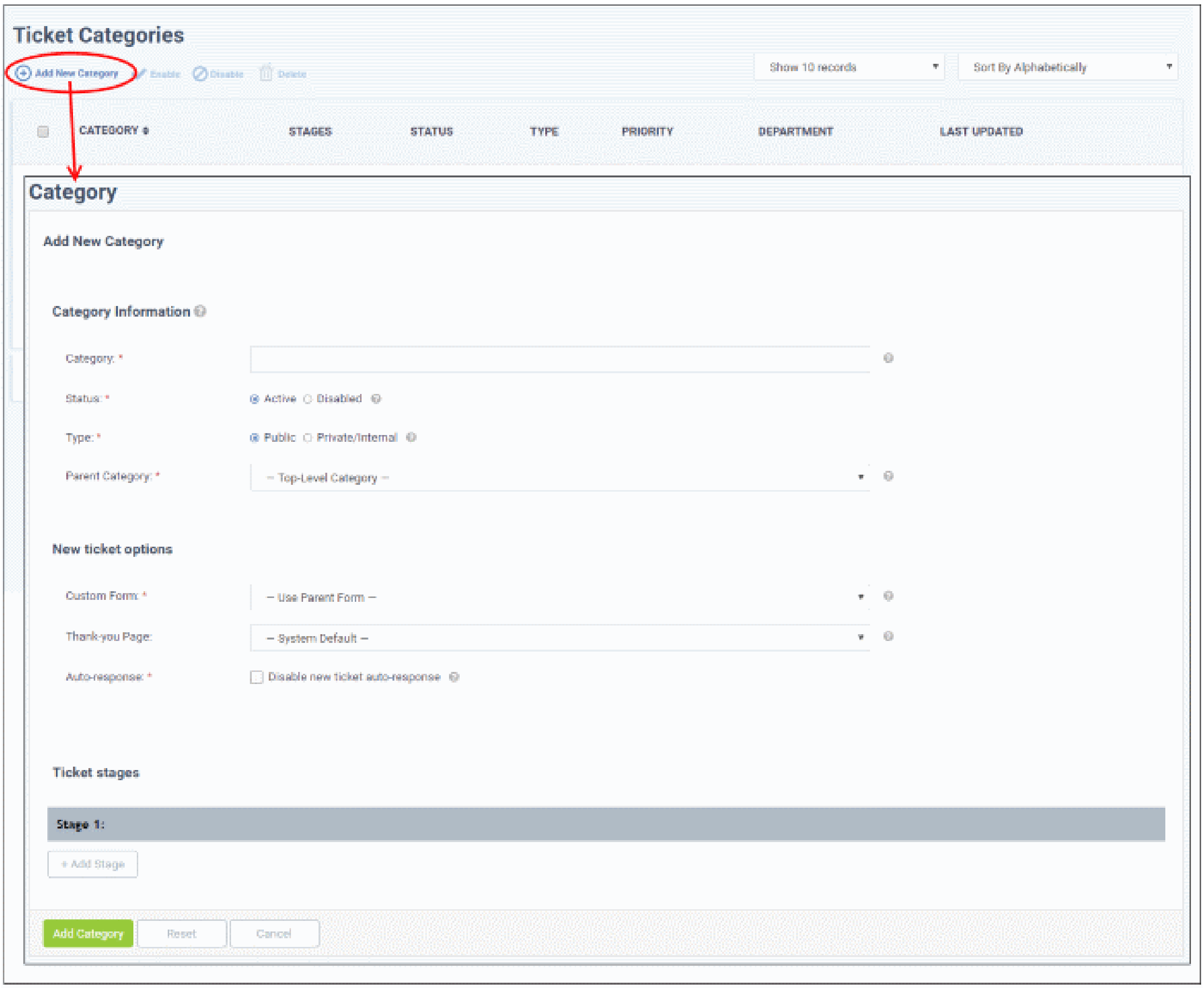


The 'Show records' drop-down on the right allows you to select the number of entries to be displayed per page. The options range from 10 records per page up to 100 records per page. You can navigate to different pages by clicking 'Next' and 'Prev' at the bottom.

To make a ticket category active/inactive, select it and click 'Enable' or 'Disable' at the top. Clicking the department link will take you to respective department. See '**Departments**' for more information.

To add a new ticket category

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



The 'Add New Category' screen will be displayed.

Category Information

- **Category:** Enter a unique name for the ticket category.
- **Status**: Select whether the ticket category should be active or not. Only active ticket categories can be published. You can change the status at any time using the 'Enable'/'Disable' links in the 'Ticket Categories' interface.
- **Type**: Select whether you want to make the category to available to both end users and staff or only to staff.
    - **Public -** The category will be available on your customer-facing support portal for users to select when creating a ticket. It will also be available in the staff panel for staff to select when creating a ticket.
    - **Private/Internal -** The category will be available only in the Staff Panel for selection by admins/staff members
- **Parent Category**: Choose a parent ticket category for this category if required. Choosing a parent category will mean this category becomes a child category of the parent.

New Ticket Options

- **Custom Form**: Select the form that should be displayed in the client portal when creating a new ticket. See **Forms** if you need more help with this.
- **Thank-You Page**: Select the confirmation page that the user will see after submitting a ticket under this ticket category. The page will be displayed to guest users only. See **Client Portal Pages** for more details about configuring client portal pages.

- **Auto-response**: Determines whether an auto-response email should be sent to the user. The setting done here overrides the auto-responder settings for the selected **Department** and **global Autoresponder** settings.

Ticket Stages

Ticket stages allow admins to set up a detailed 'step-by-step' process for dealing with requests on a particular ticket category. Each stage can be configured to route and prioritize the ticket at various phases of its life-cycle. Each stage allows admins to define the department, priority, SLA and person that the ticket should be assigned to. Admins can also configure ticket categories so that a ticket can be closed with a single stage, to be backward compatible with previous versions.

By default, each ticket category will have at least one stage. The stage attributes allow administrators to:

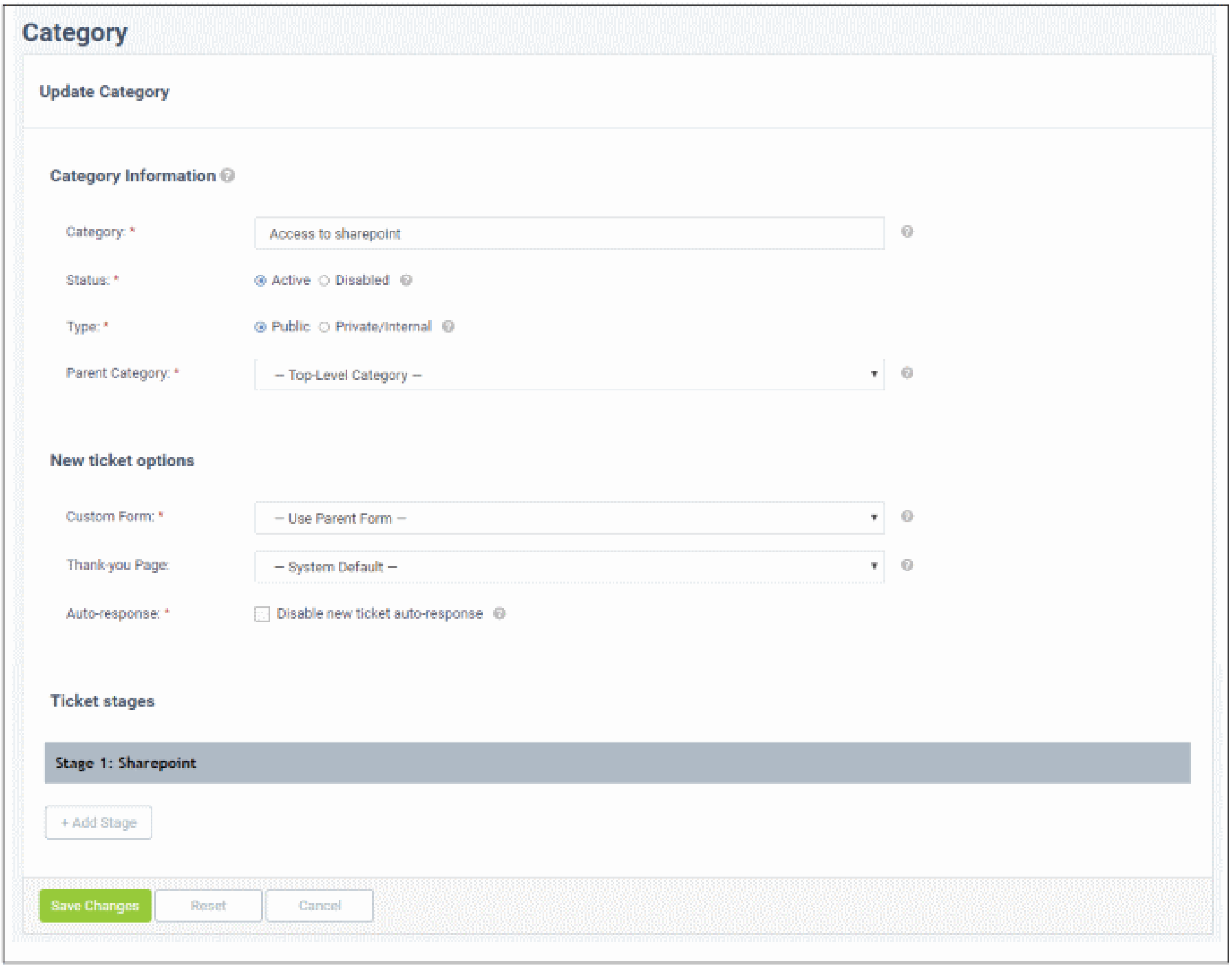
  - Route ticket to departments such as maintenance, sales or support
  - Change the priority to low, normal, high or critical.
  - Redefine SLA plan
  - Auto-Assign to staff members / agents

- Click the 'Stage' stripe to add/edit the following parameters:
  - **Stage Name:** Enter a name for the stage
  - **Department**: Select the department that the ticket will be assigned automatically if this ticket category is chosen by the user. For subsequent stages, the ticket will be assigned as per the selected department for those stages.
  - **Priority**: Select the priority level for this ticket category. The options available are Low, Normal, High and Critical. Please note the priority level configured in **Ticket Details** will override this setting done here.
  - **SLA Plan**: Select the SLA Plan for this category. The setting done here will override the SLA Plan configured for the selected **Department**.
  - **Auto-assign To**: Select the admin/staff member or team that the ticket under this category should be automatically assigned. For subsequent stages, the ticket will be assigned as per the selected admin / staff for those stages. Please note the assignments configured in **Ticket Details** will override this setting here.
  - **Admin Notes:** Add any notes related to the ticket category for internal purpose. This will not be visible in the client portal.
- Click 'Add Stage', to create a new stage for the ticket category
- Click the 'Add Category' button at the bottom of the screen for the settings done in the page to take effect.

To edit a ticket category

- Click the ticket category name

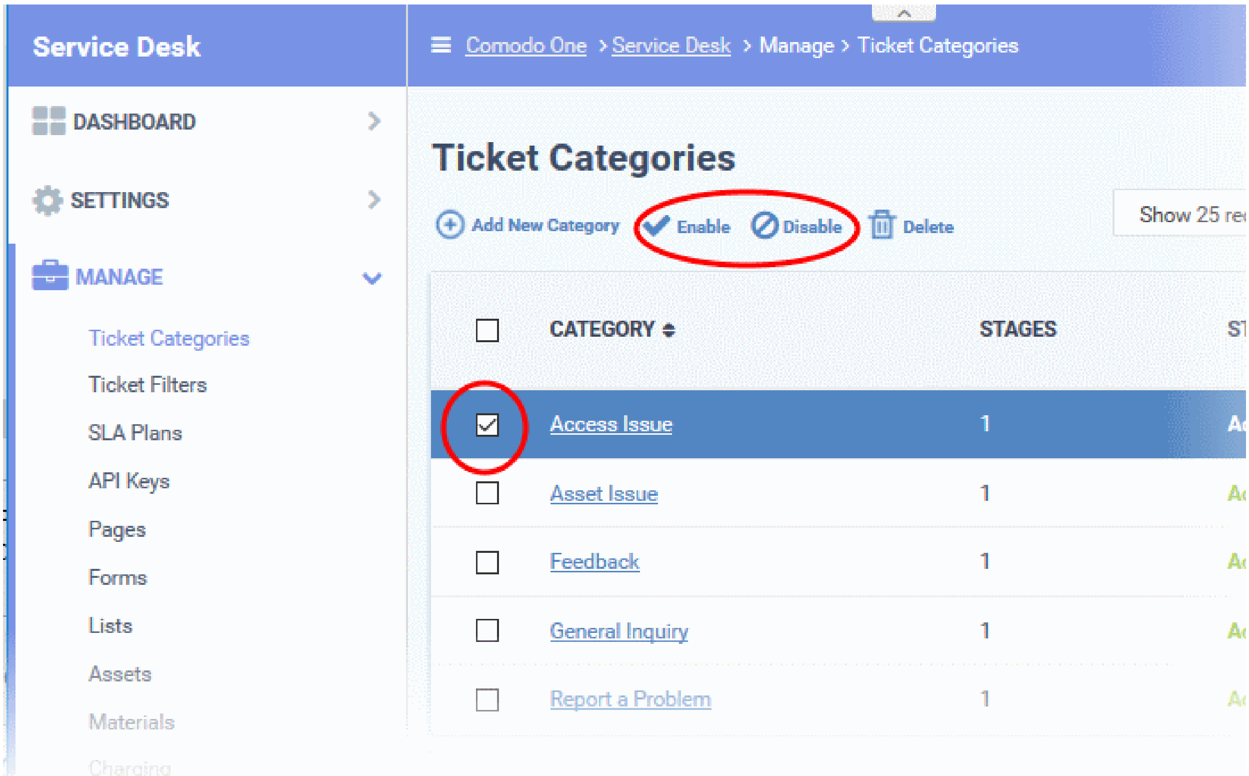
The 'Update Category' screen will be displayed.



The update procedure is same as explained above while **adding** a new ticket category.

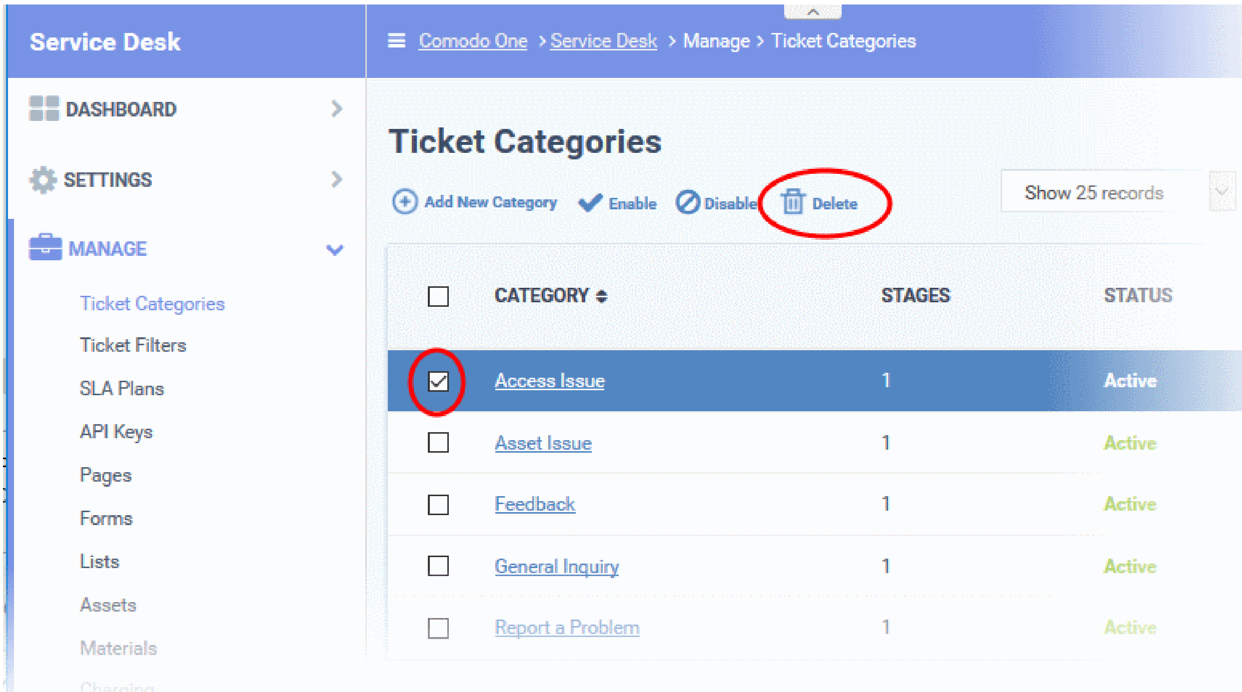
To enable/disable a ticket category

- Select the ticket category that you want to enable/disable from the list, click the 'Enable' or 'Disable' link at the top of the screen and confirm it.



To delete a ticket category

- Select the ticket category that you want to delete from the list > Click the 'Delete' link at the top of the screen > Confirm the deletion.



2.3.2 Ticket Filters

- Ticket filters allow you to create rules which implement specific actions on tickets if certain criteria are met.
- Actions include routing tickets to a specific department/admin/staff member, sending an auto-response, closing/rejecting a ticket, changing the ticket owner and more.
- Once saved and made active, the filter will be applied to all new tickets received by your organization.

- You can create multiple filters and prioritize them as required using the 'execution order' setting. Filters with a 'higher' execution order (e.g. '1', '2'...) will take precedence in the event of a conflict.

Examples:

1. Identify tickets with device names starting with 'Desktop' and change the users for those tickets to a specific user (for example, the network administrator).
2. Automatically assign tickets generated by other Comodo One modules to a specific staff member

The 'Ticket Filters' interface allows administrators to add and manage ticket filters and filter actions.

To open the 'Ticket Filters' interface

- Open the 'Admin Panel'
- Click 'Manage' on the left then 'Ticket Filters'

Ticket Filters - Column Descriptions	
Column Header	**Description**
Name	The name of the filter
Status	Indicates whether the filter is enabled or disabled
Order	Indicates the order of priority that the filter will be executed
Rules	Indicate the number of rules configured for the filter
Target	Indicates the source of the ticket
Date Added	The date on which the filter was created
Last Updated	The date and time the filter was edited and updated

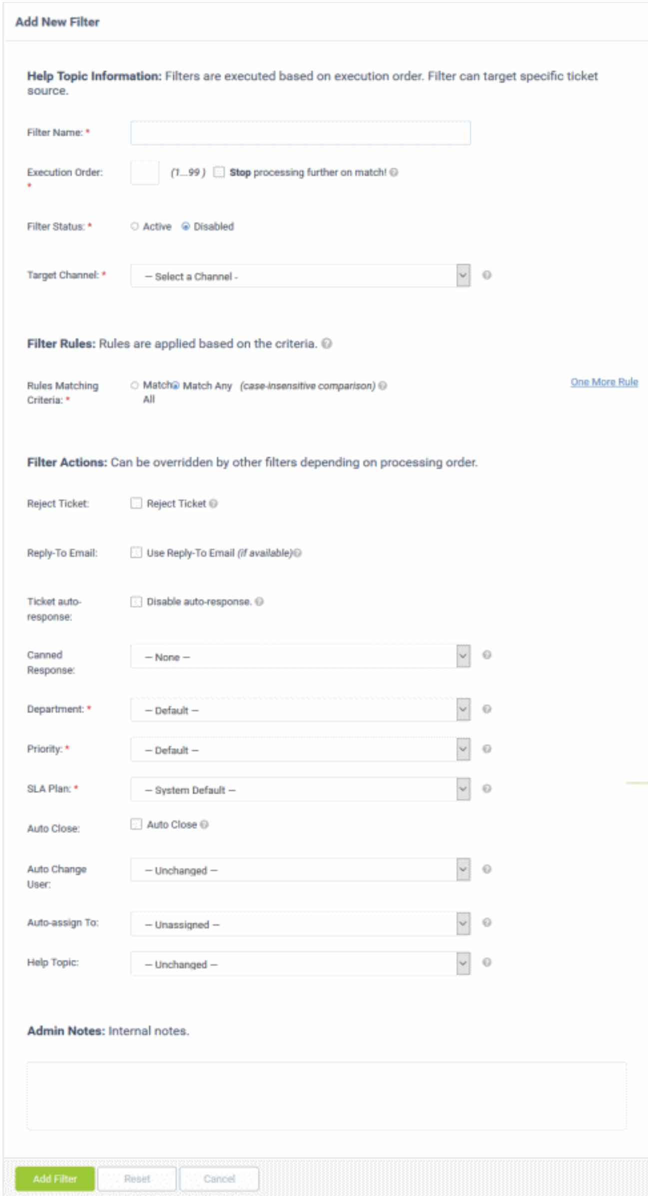
Sorting the items

- Clicking on a column header sorts the items in ascending/descending order.
- By default, 10 filters are displayed per page. To change the number of items displayed n a page, select the number from the 'Show records' drop-down on the top right. You can navigate to different pages by clicking 'Next' and 'Prev' at the bottom.
- To make a ticket filter active/inactive, select the check box beside it and click the 'Enable' or 'Disable' button.

To add a new filter

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

The 'Add New Filter' screen will be displayed.



Filter Information

- **Filter Name:** Enter a unique name for the filter
- **Execution Order:** Enter the priority number for this filter, the lower the number, the higher the priority. The filtering is executed based on the priority number regardless of other matching rules that follow, hence the priority order of the filter plays an important role in executing the filter. If you want to the filter to be applied last on a match, then select the 'Stop processing further on match!' check box.
- **Filter Status:** Select whether you want the filter to be enabled or disabled. You can change the filter status at anytime using the 'Enable'/'Disable' buttons in the 'Ticket Filters' interface.
- **Target Channel:** Select the source of the ticket for which the filter should apply after a match.

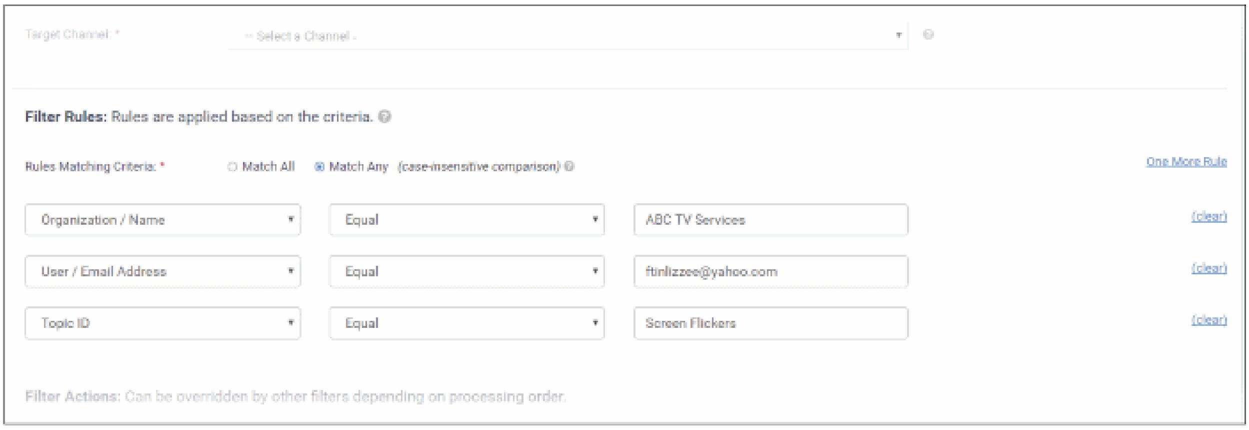
Filter Rules

You can define any number of rules to identify tickets which should be covered by the actions in a filter. If a ticket matches the parameters in the rules then your actions will be applied.

Each rule is constructed as an expression with a search condition and a search criteria. You can also define whether to apply the action(s) if all rules are met, or any one of the rules is met.

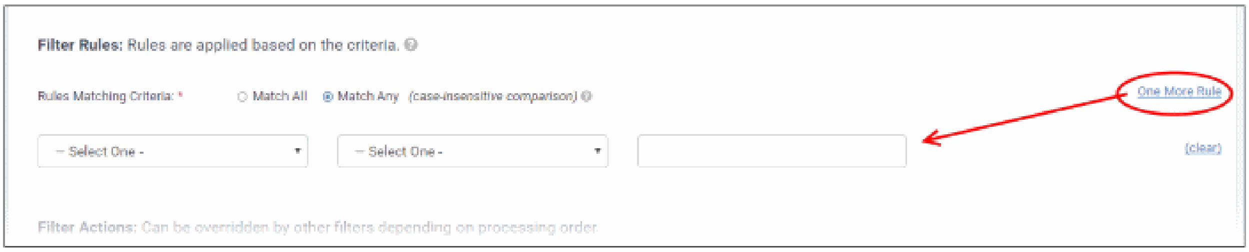
Rule Matching Criteria:

- Match All - Will only apply the actions to a ticket if every rule is met
- Match Any - Will apply the actions to a ticket if any single rule is met



To add a filter rule

- Click 'One More Rule'



- Define a search rule in the following format:

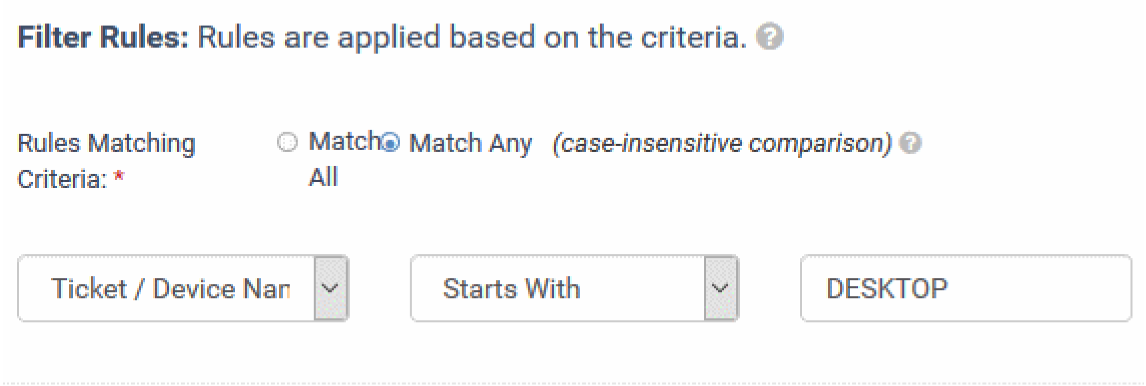
  <Search Parameter> <Relation operator> <Search Criteria>
- Choose the search parameter from the first drop-down. The available options are:

Category	Parameter
User	Email Address Full Name Phone Number Internal Notes
Ticket data	Issue Summary Issue Details Priority Level Asset Type Category Sub Category Device Name
Organization Data	Name

	Web Domain Address Phone Website Internal Notes
Ticket Category	Category ID
Email Meta Data	Reply-To Email Reply-To Name
User Information	Name Email

- Select the relation operator for from the second drop-down (Equal, Not Equal, Starts With, etc)
- Type the search criteria in the text field. What you type here depends on the search parameter you picked in the first drop-down, so it could be a specific email address, organization name, user, ticket category etc.

For example, the rule shown below will catch all tickets which contain a 'Device Name' that starts with 'DESKTOP'.



- Repeat the process to add more rules to the filter
- To remove a rule, click the 'Clear' link at the right of the rule.

Filter Actions

You can select the actions to be automatically taken on the tickets matching the rules configured as explained above. The available actions are:

- **Reject Ticket**: If enabled, the further process of the ticket will be stopped. The ticket will not be applied with other actions set for the filter. However, the ticket will not be rejected but it will be assigned as per other parameters defined in the ticket.
- **Reply-To Email**: If enabled, an automated reply email will be sent to the email address from which the ticket was generated. This is applicable only if the ticket source is 'Email'.
- **Ticket auto-response:** If selected, auto-response mails will be disabled. The setting done here will override the setting done in **Department** and **Autoresponde**r screens.
- **Canned Response:** Select the Canned Response that will be sent to the user. See **Canned Responses** for more details.
- **Department:** Select the support department that the ticket will be routed automatically. Refer to the section **Department** for more details.
- **Priority:** Select the priority level to be applied to the ticket. The options available are Low, Normal, High and

Critical. Please note the priority level configured here will override the settings done in **Department** and **Ticket Category**.

- **SLA Plan:** Select the SLA Plan to the tickets. See **Service Level Agreements** for more details.
- **Auto Close:** The ticket will be closed, regardless of the current state of the ticket. The status of the ticket will change to 'Closed' in the 'Tickets' interface and in the reports.
- **Auto Change User:** The ticket owner will be set as the user chosen from the drop-down. All further correspondence will be with the new user.
- **Auto-assign To:** Select the admin/staff to whom the ticket should be automatically assigned.
- **Category:** Select the ticket category that you want it to be applied for the ticket that matches this filter. See **Ticket Categories** for more details.

Admin Notes

Add any notes related to the ticket filter for internal purpose.

- Click the 'Add Filter' button at the bottom to save your new filter.

To edit a ticket filter

- Click on the ticket filter name in the list.

The 'Update Filter' screen will be displayed. The update procedure is same as explained above while **adding** a new Ticket Filter.

To delete a ticket filter

Select the check box beside the ticket filter that you want to delete from the list and click the 'Delete' button at the bottom of the screen and confirm the deletion in the Confirmation dialog.

2.3.3 Service Level Agreements (SLA)

Service Level Agreement (SLA) plans define the period before which a ticket should be attended and closed. Administrators can also configure warning level alerts if a SLA plan period is breached.

To open the 'SLA Plans' interface

- Click 'Manage' on the left then 'SLA Plans' in the Admin Panel

Sorting the items

- Clicking on a column header to sorts the 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 records per page. You can navigate to different pages by clicking 'Next' and 'Prev' at the bottom.

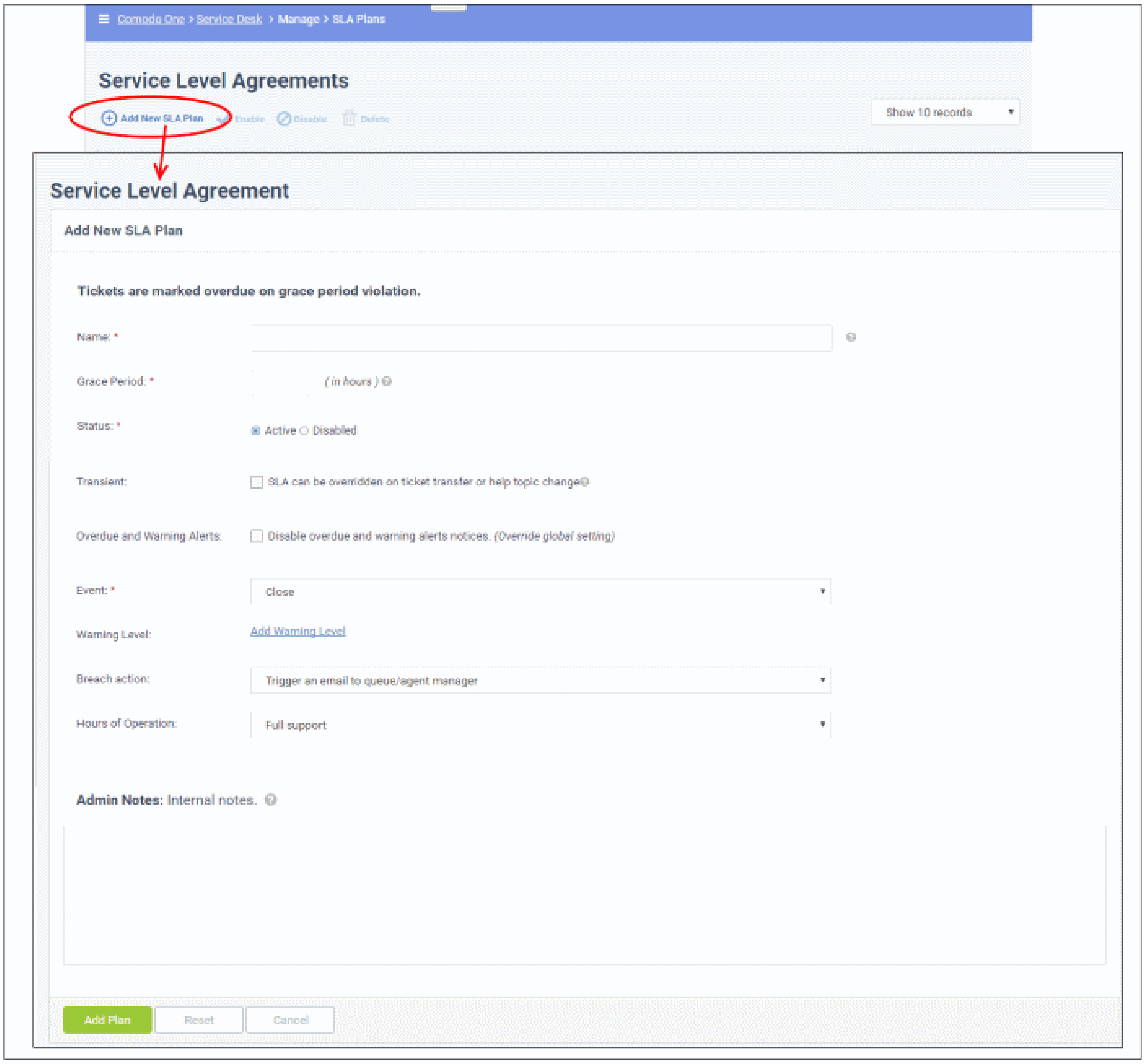
Column Headers

- **Name:** The name of the SLA Plan
- **Status:** Indicates whether the SLA Plan is enabled or disabled
- **Grace Period:** Indicates the period allowed for the ticket issue to be resolved after which it will be marked as Overdue.
- **Date Added:** The date on which the SLA Plan was created
- **Last Updated:** The date and time the SLA Plan was edited and updated

To make a SLA Plan active/inactive, select it and click 'Enable' or 'Disable' at the top.

To add a new SLA Plan

- Click the 'Add New SLA Plan' link at the top



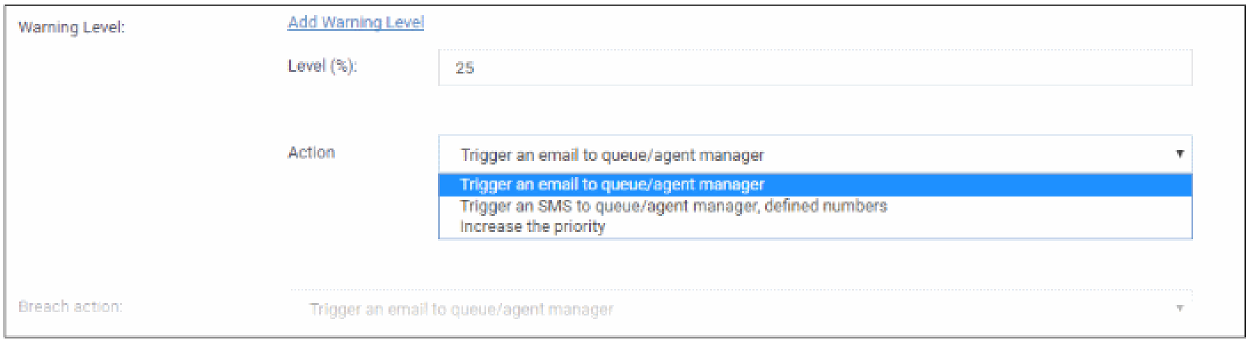
The 'Add New SLA Plan' screen will be displayed.

New SLA Plan

- **Name:** Enter a unique name for the SLA Plan
- **Grace Period:** Enter the time in hours after which a ticket will be marked as overdue. Please note the period is counted from the ticket created time.
- **Status:** Select whether the SLA Plan should be active or disabled

- **Transient:** Select if the SLA Plan should be marked as Transient SLA. These transient SLA Plans are temporary and if the ticket is transferred to another Department or its Ticket Category is changed, this plan will be overridden by non-transient SLA Plan of the Department or Ticket Category.
- **Overdue and Warning Alerts:** If enabled, overdue and warning alerts for the tickets that breached SLA Plan will not be generated.
- **Event:** The options available are 'First Response' and 'Close'. If the former is selected, then an alert will be sent to admins/staff members if a ticket is not replied within the grace period.If 'Close' is selected, then an alert will be sent to admins/staff members if the ticket is not closed within the grace period.
- **Warning Level:** Warning level settings generate alerts before the grace period ends. You can set as many alerts as required. To add a warning level, click 'Add Warning Level'.

    - Enter the warning level and select the action to be taken in case the ticket is not closed before first warning level period. For example, if the grace period for the SLA Plan is 8 hours and if the first warning level is configured as 25% and action as 'Trigger an email to queue/agent manager'. In case the ticket for which the SLA Plan is applicable is not closed before 2 hours, a warning alert email will be sent to the agent manager.



    - Click the 'Delete' link to remove a Warning Level

- **Breach Action:** Select the action to be taken if the ticket is not closed before the grace period.
- **Hours of Operation:** The options available are 'Full Support' and 'Business Hours'. If Full Support is chosen, then the support period is counted for full 24 hours per day. If 'Business Hours' is chosen, then the support period is chosen as per the business hours defined in **Settings > System** > Business hours section. For example, if in the SLA Plan the grace time is defined as 12 hours, the period will be calculated based on the business hours. Suppose if the business hours is fixed as 8 hours per day and if a ticket is raised on a Sunday, SLA will start count on Monday morning for 8 hours that day and then will continue to count on Tuesday morning. If the issue is not solved by Tuesday noon, then you will have a SLA breach.

Admin Notes

Add any notes related to the SLA Plan for internal purpose.

- Click the 'Add Plan' button to save your new plan.

To edit a SLA Plan

- Click on the SLA Plan name in the list.

The Update SLA Plan screen will be displayed. The update procedure is same as explained above while **adding** a new SLA Plan.

To delete a SLA Plan

- Select the SLA Plan that you want to delete from the list, click the 'Delete' button at the top of the screen and confirm it.

2.3.4 API Keys

- Comodo One (C1) contains several modules that help IT managers to keep their organization's computers running smoothly. Three of these modules, RMM, Patch Management and ITSM, are capable of automatically sending tickets to Service Desk via API.
- You can integrate Service Desk to your own applications through API. Once integrated, you can submit and manage tickets using your own interfaces.
- Service Desk requires API keys to authenticate C1 modules and custom applications that submit tickets.
- Administrators need to specify the IP addresses from which these applications can access Service Desk.
- Service Desk auto-generates API keys for these IP addresses to authenticate access requests.

The 'API Keys' interface lets administrators create and manage keys used to communicate with external devices that access Service Desk.

To open the 'API Keys' interface

- Make sure you are in the 'Admin Panel'
- Click 'Manage' on the left then 'API Keys'

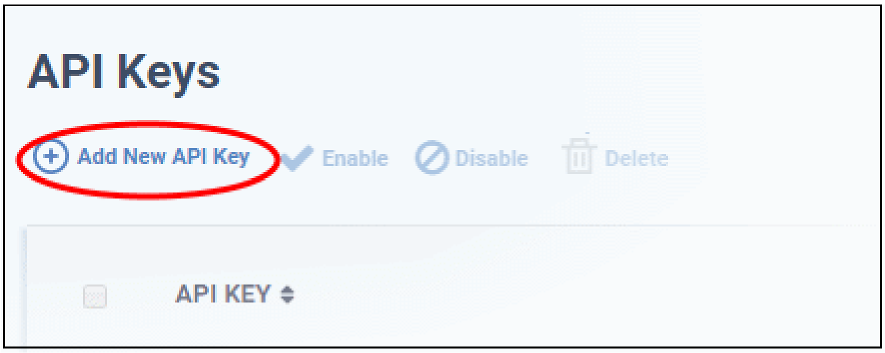
- **API Key**: The key generated for the IP address shown in the 2nd column
- **IP Addr**: IP address of the endpoint or network for which the key was generated
- **Status**: Indicates whether the key is enabled or disabled
- **Date Added**: The date on which the key was generated
- **Last Updated**: Time and date that the key was most recently edited.

To make a API key active/inactive, select it and click the 'Enable' or 'Disable' link at the top.

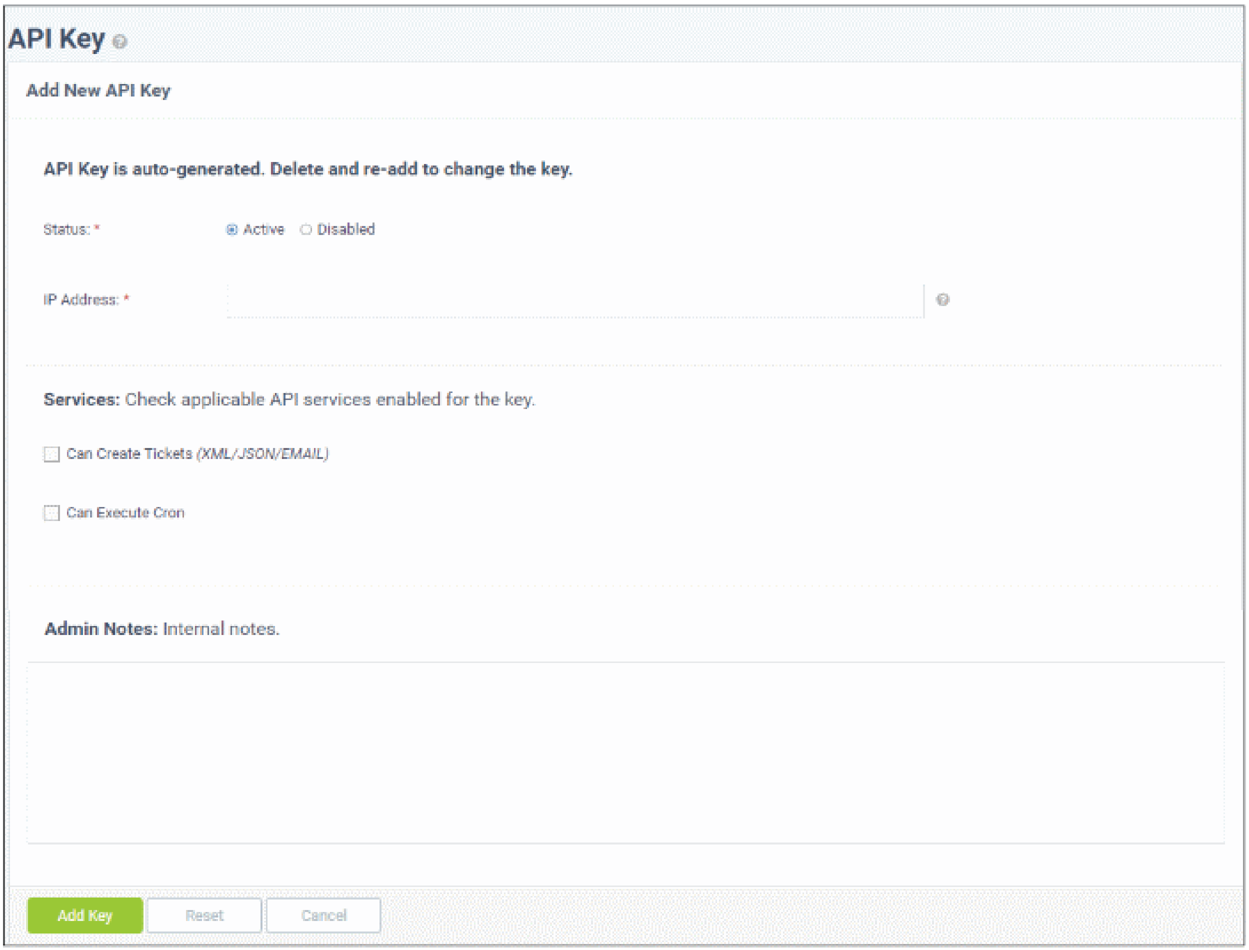
- Click a column header to sort items in ascending/descending order
- The 'Show records' drop-down on the right allows you to select the number of entries to be displayed per page.

To generate a new API key

- Click the 'Add New API Key' link at the top of the interface:



This will open the key configuration screen:



- **Status**: Activate or disable the key. Service desk will not accept connections from disabled keys.
- **IP Address**: Enter the IP address of the connecting client. A single API key can be shared by a group of clients by entering the '%' symbol at the end. For example, 10.10.0.% will cover all clients in the subnet 10.10.0.0/24.
- **Can Create Tickets (XML/JSONE/EMAIL)**: If enabled, clients can create and submit tickets using XML/JSONE scripts.
- **Can Execute Cron**: If enabled, Service Desk allows external schedulers to run (Linux crontab) for various tasks. The external scheduler can only be set by system administrators at the time of Service Desk installation.
- **Admin Notes:** Add any additional informational about the key. For example, you could use this space to leave configuration notes.
- Click 'Add Key' to save the key and make it available for selection

To edit a API Key

- Open the API Key management screen.
- Click a key in the list.
- This will open the update key screen. The configuration is the same as that for **adding** a new API Key.

To delete a API Key

- Select the key(s) that you want to delete then click the trash can icon above the table.

2.3.5 Client Portal Pages

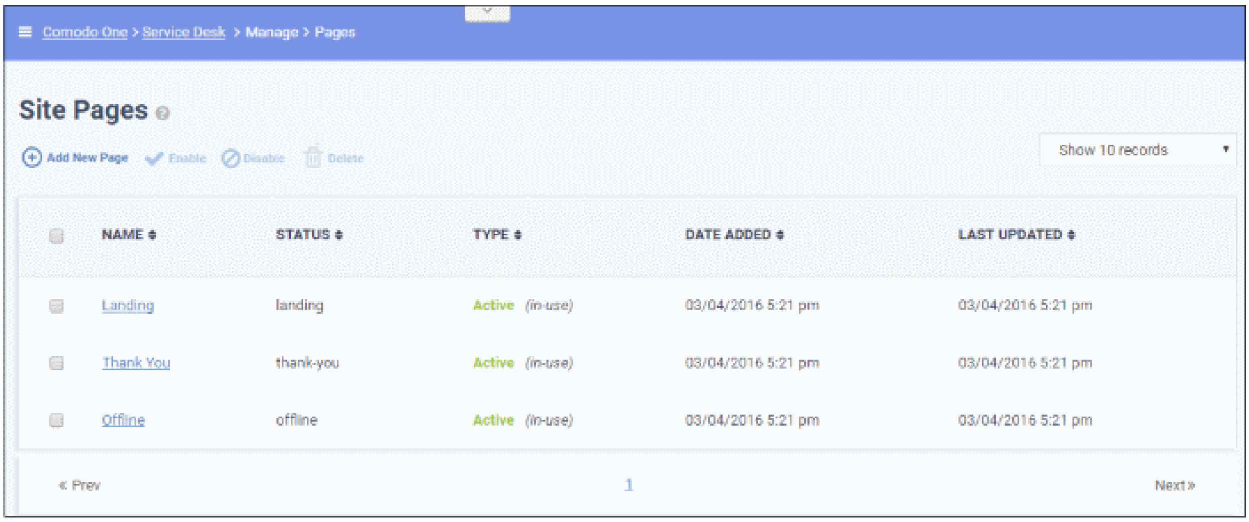
- The 'Client Portal' is the customer-facing support page which is accessed by end-users in order to submit tickets, track tickets or read your support content.
- This page will be automatically created once you sign-up for a Comodo One account. The URL of the page is: https://<your company name>.servicedesk.comodo.com

You can view your support center URL in 'Service Desk System Settings' (Admin Panel > 'Settings' > 'System'). See **C1 Service Desk System Settings** for more details.

- You can add knowledge articles and FAQs to your client portal to build a repository of information aimed at dealing with common issues. You can also add custom forms to more effectively route tickets to the correct department. See **Configure Your Support Center Page** for more details.
- The 'Site Pages' interface lets you view and manage the content of your support center page. There are four types of pages:
    - **Landing Page**: Home page of your customer support center.
    - **Offline Page**: Displayed when the service center is not available.
    - **Thank You Page**: The page that is displayed after a user submits a ticket.
    - **Other**: Pages that can be used for general content.
- Service Desk ships with one page of default content in each of the 'Landing', 'Offline and 'Thank you' page types. Administrators can edit these pages and create also multiple versions of each type. However, only one page of each type can be live at any time. This is configured in the **Settings > Company Profile** screen.

To open the 'Site Pages' interface

- Click 'Manage' on the left then 'Pages' in the Admin Panel



Sorting the items

- Clicking on a column header sorts the items in ascending/descending order of entries in that column.

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 records per page. You can navigate to different pages by clicking 'Next' and 'Prev' at the bottom.

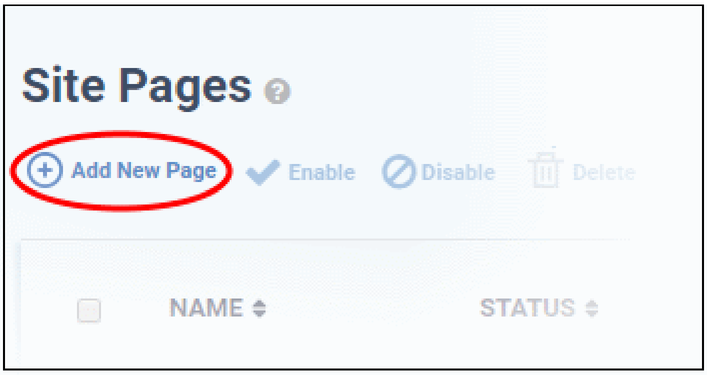
Column Headers

- **Name:** The name of the page entered during adding
- **Type:** Indicates the type of site page - Landing, Thank-You, Offline or Other.
- **Status:** Indicates whether the page is active or disabled
- **Date Added:** The date on which the page was added
- **Last Updated:** The date and time the page was edited and updated

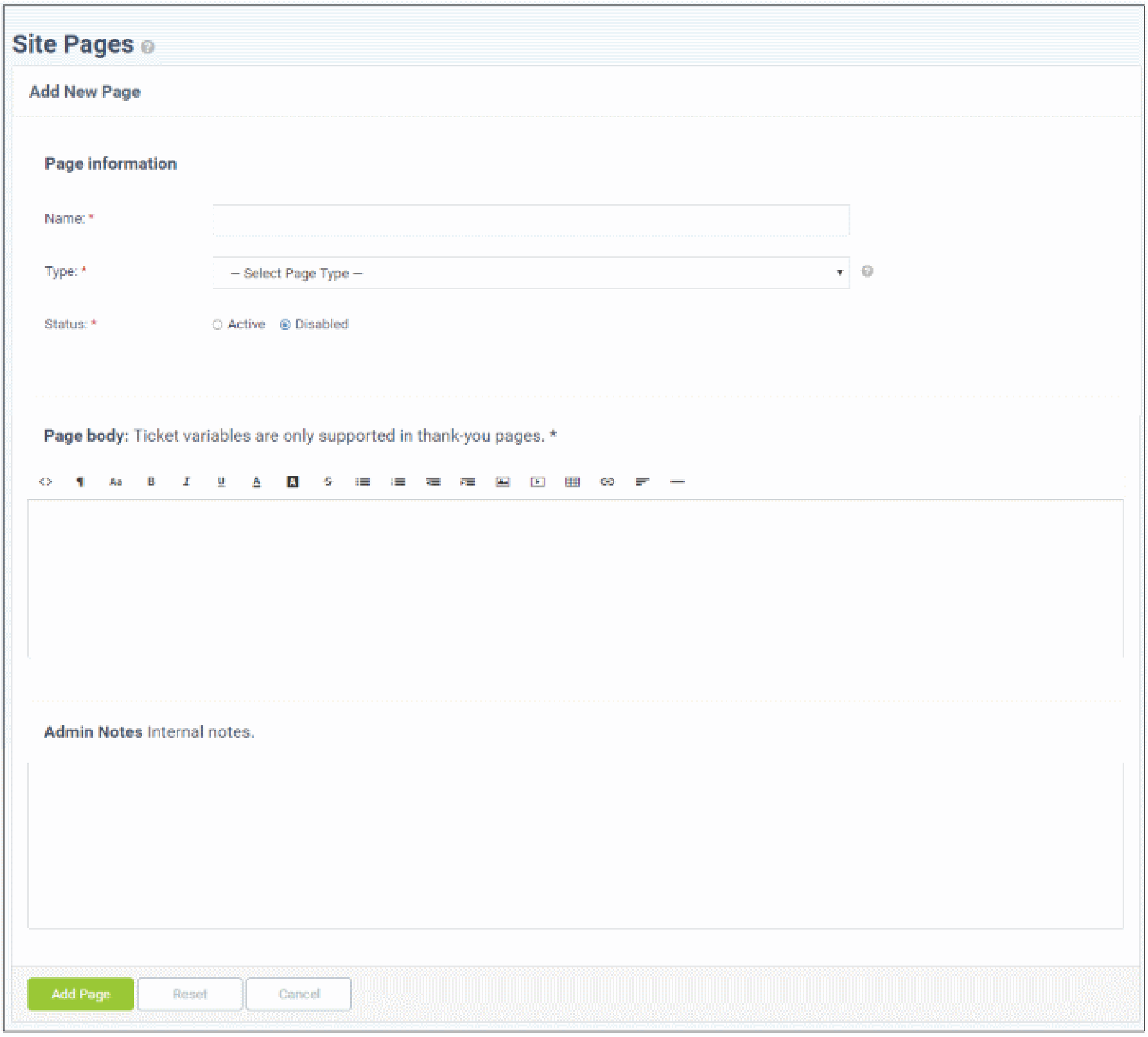
To make a site page active/inactive, select it and click the 'Enable' or 'Disable' link at the top.

To add a new site page

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



The' Add New Page' screen will be displayed:



Page Information

- **Name:** Enter the unique name for the page
- **Type:** Select the page type from the options
- **Status:** Select whether the page should be enabled or disabled

Page Body

Write the content for the selected page in the Rich text editor. Please note that the ticket variables are supported only in the 'Thank-you' pages.

Admin Notes

Add any notes related to the Site Page for internal purpose.

- Click the 'Add Page' button at the bottom of the screen for the settings done in the page to take effect.

To edit a site page

- Click on the site page in the list.

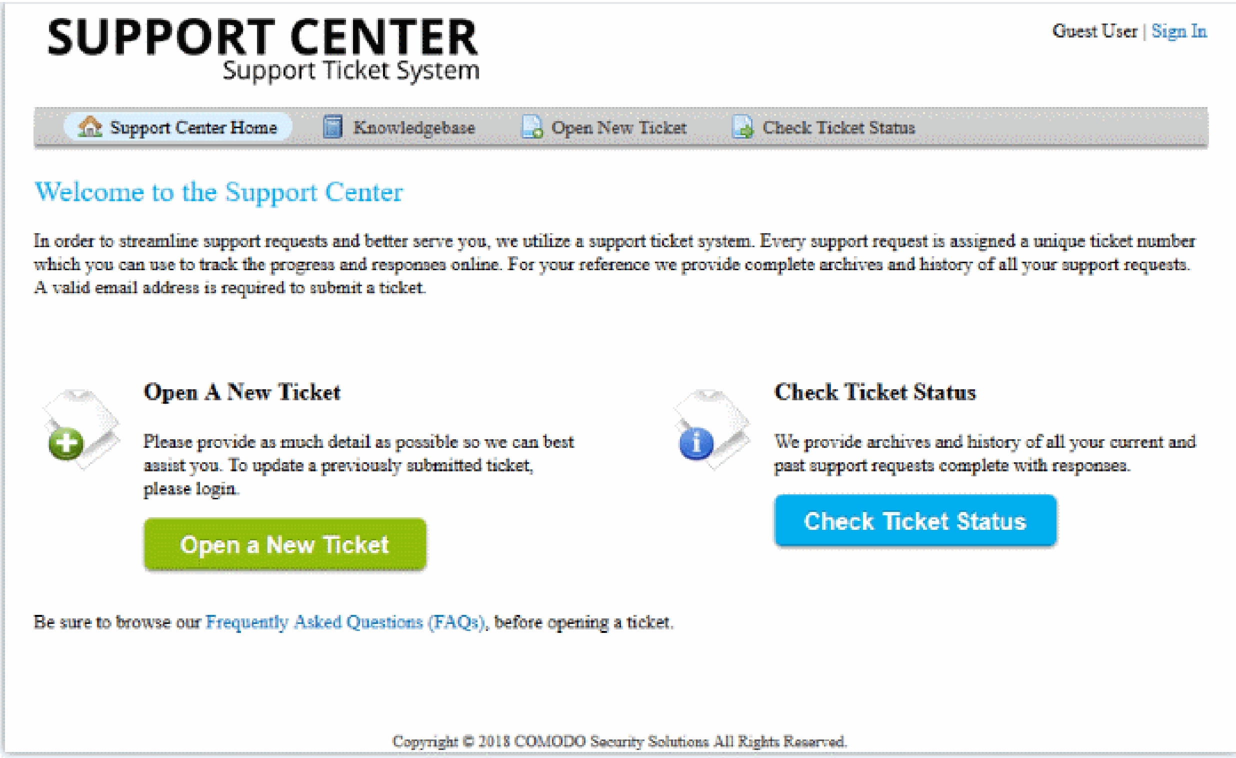
The Update Page screen will be displayed. The update procedure is same as explained above while **adding** a new Site Page.

To delete a site page

- Select the page that you want to delete from the list , click the 'Delete' link at the top of the screen and confirm the deletion in the 'Confirmation' dialog. Please note that pages that are active and being used (displays as Active (in-use)) cannot be deleted.

2.3.5.1 Configure Your Support Center Page

- Your support center page allows end-users to submit tickets, track tickets and read your support content.
- This page will be automatically created once you sign-up for a Comodo One account. The URL of the page is: https://<your company name>.servicedesk.comodo.com



- **Open and customize your Support Center home page**
- **Create knowledge-base articles and FAQs (optional)**
- **Create ticket categories and ticket stages to route tickets to the appropriate departments (optional)**
- **Create custom forms to gather information which is essential to answer a request (optional)**
- **Create canned responses so staff can quickly answer common questions (optional)**
- **Create custom 'Offline' and 'Thank you' pages (optional)**

Open and Customize your Support Center home page

- You can view your support center page at https://<your company name>.servicedesk.comodo.com
- If required, you can find your company name as follows:
  - C1 interface - Click 'Management' > 'Account'
  - Service Desk interface - Click 'Admin Panel' > 'Settings' > 'Company'.

  Please note, only the first word from your company name is used in the URL. For example, if your company name is 'Acme Corp', then your URL will be https://acme.servicedesk.comodo.com

The support center page has three tabs, 'Support Center Home', 'Open New Ticket' and 'Check Ticket Status' by default. The Knowledgebase tab will be available depending on the settings configured by the administrator.

- **Support Center Home** - Displayed by default when a user opens the support center. It contains links for users to create new tickets and view the progress of existing tickets.
- **Knowledgebase** - Allows users to read frequently asked questions (FAQs) on the area which they need

help. FAQs can help users to find solutions for common issues before generating a ticket.

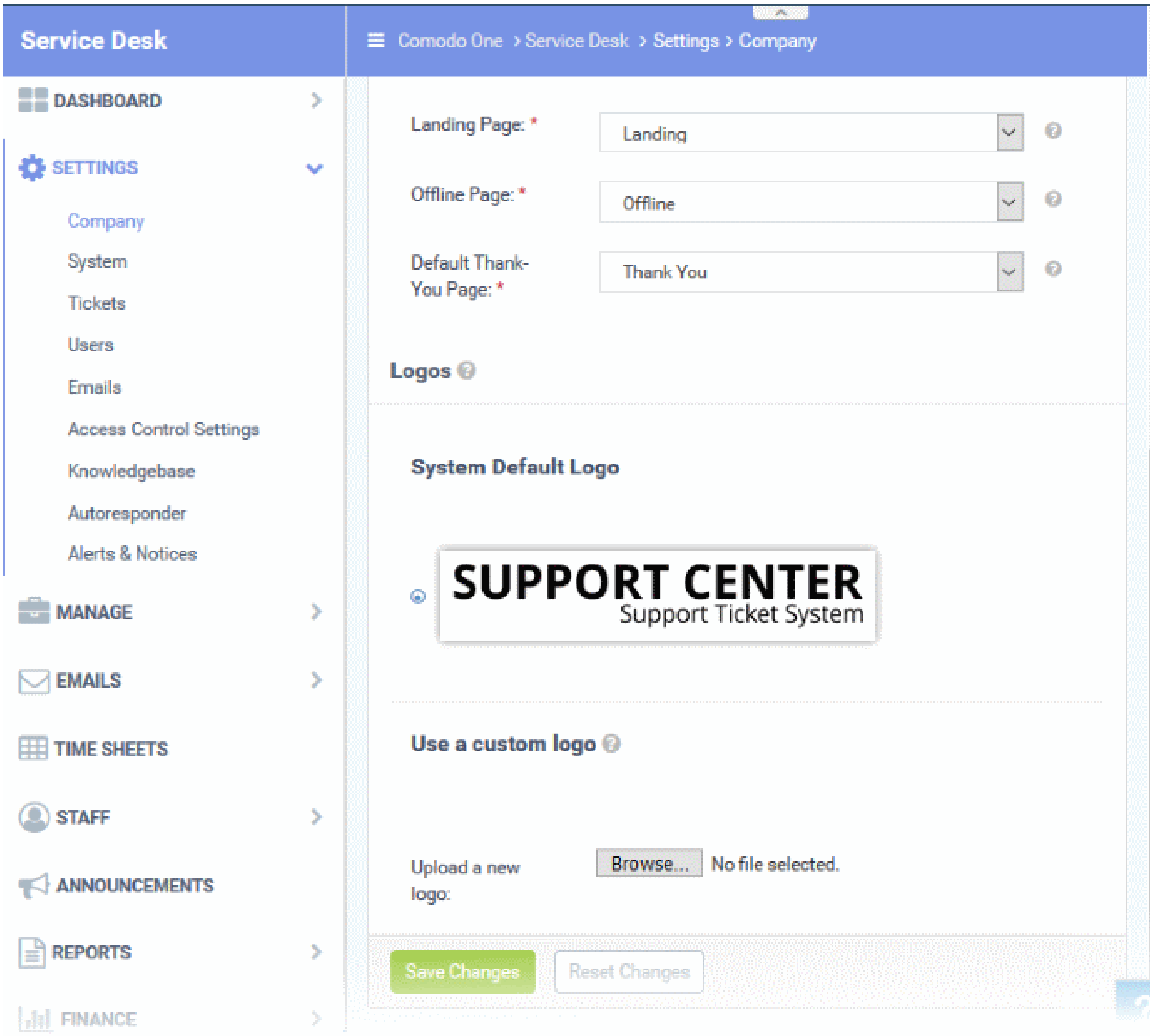
- **Open New Ticket** - Allows users to create new support tickets
- **Tickets** - Lets users view the details and progress of their tickets

You can customize the company logo and the content displayed on the 'Home' page.

Company Logo

The default logo shown on the page simply says 'Support Center - Support Ticket System'. You can replace it with your company logo as follows:

- Click 'Admin Panel'
- Click 'Settings' > 'Company'
- Scroll down to the 'Logos' section
- Choose 'Use a custom logo'
- Click 'Browse...' then locate and upload the image file you wish to use
- Click 'Save Changes' for your settings to take effect



See **Configuring Company Profile** if you need more help with this.

Welcome Message

The default welcome content on the home page explains how end-users can use the portal to submit and track tickets. You can customize this content by creating a new 'Landing Page'.

To create the new page content:

- Click 'Admin Panel'
- Click 'Manage' > 'Pages'
- Create a name for your page and select 'Landing Page' as the type. The landing page determines the content shown on the support desk 'Home' page.
- Select 'Active' as the status then enter your new content in the 'Page Body' field.
- Click 'Add Page' to save the page.

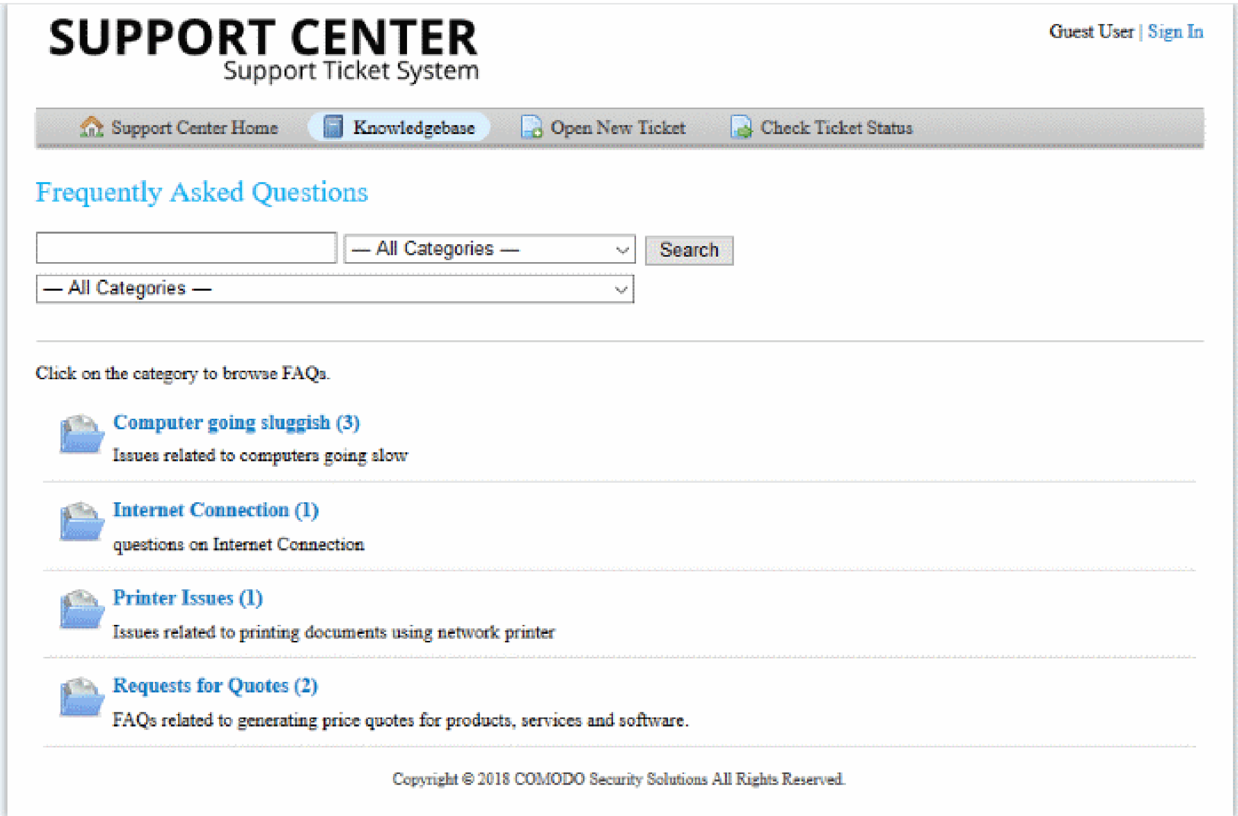
To apply the new content to the portal:

- Click 'Settings' > 'Company'
- Scroll down to the 'Site Pages' section
- Choose your new page in the 'Landing Page' drop-down
- Click 'Save Changes' at the bottom to put the content live

- You can follow a similar process to modify the content of the 'Offline' and 'Thank-You' pages.

Create knowledge-base articles and FAQs (Optional)

- The 'Knowledgebase' tab contains FAQs intended to help users find answers to common issues.
- FAQs are a good source of first-line support and can also reduce staff workload:



- You must first create an FAQ category then add individual FAQs to the category. For example, the category 'Internet Connectivity' may contain the FAQs 'How do I connect through a proxy server' and 'I can't connect to the internet'.
- **To create a category:**
    - Click 'Staff Panel' > 'Knowledgebase' > 'Categories'
    - Click 'Add New Category'

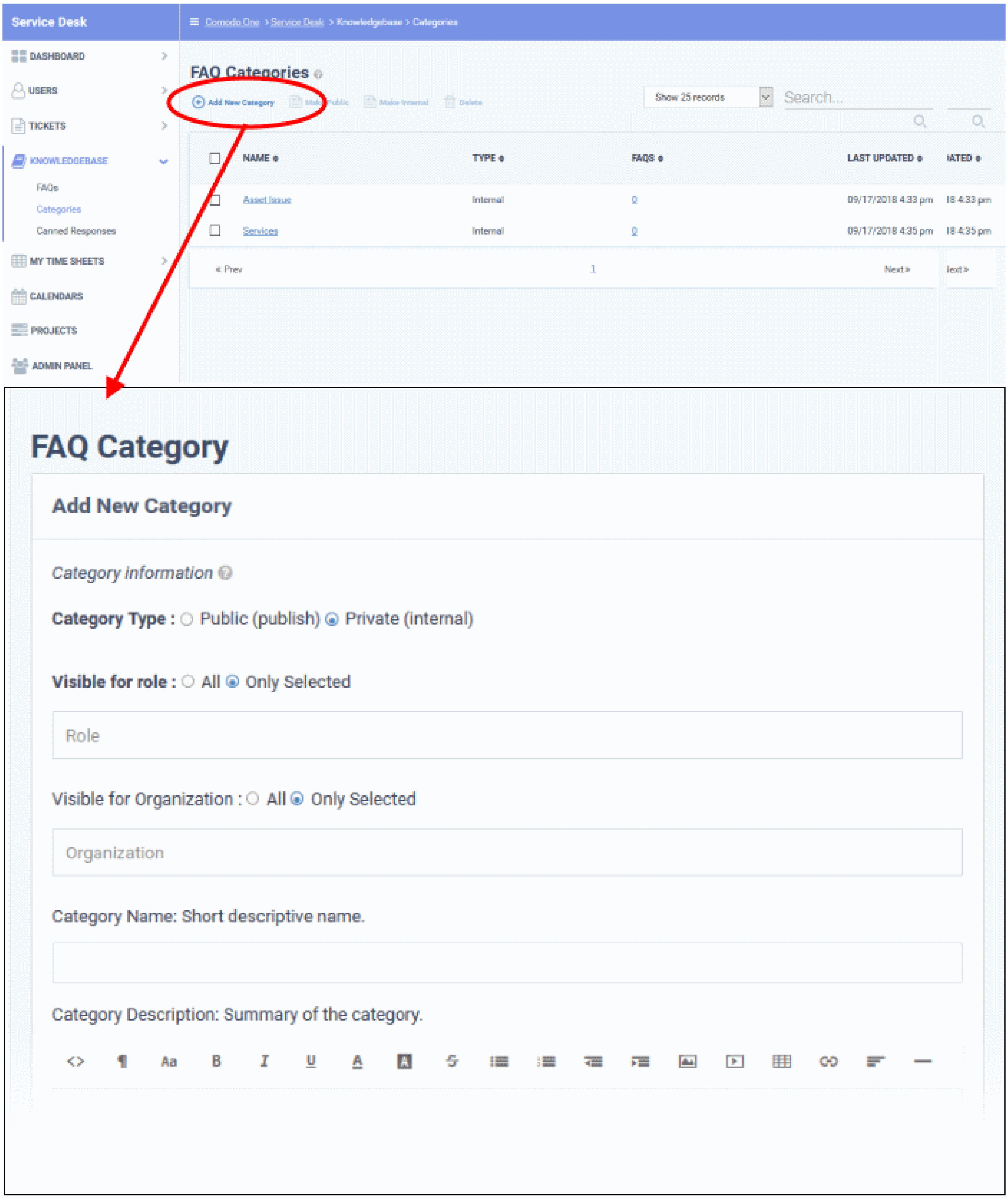
- Create the category name and description. Choose whether it should be a public or private category and select to whom the FAQ should be visible
- Click 'Add'.

- Once you have created your categories, you can add individual FAQ's in two ways:
  - **From A Ticket** - Staff can add tickets which they have successfully answered as knowledgebase entries.
    - Click 'Staff Panel' > 'Tickets' > 'Open' (or one of the other ticket categories)
    - Locate and open the ticket you wish to add as an FAQ
    - Click 'More' > 'Create KB Entry'
    - Select the category under which the FAQ should be placed.
    - Specify whether the FAQ should be internal or external.
    - Click 'Add FAQ'
    - Once saved, the entire ticket, including all replies and solutions will be posted as an FAQ
  - **From the Staff Panel** - Staff can manually add FAQs to categories as follows:
    - Click 'Staff Panel' > 'Knowledgebase' > 'FAQs'
    - Click on the appropriate FAQ category from the list in the lower half of the page
    - Click 'Add New FAQ'
    - Type the question label, select 'Public' or 'Internal' and type the answer (if you choose 'Internal' the FAQ will not be available for end-users)
    - Upload attachments and select related issues if required
    - Click 'Add FAQ'

The rest of the info in this step contains more help to create categories and individual FAQs:

To create and manage categories

- Open the 'Staff Panel'
- Click 'Knowledgebase' > 'Categories'



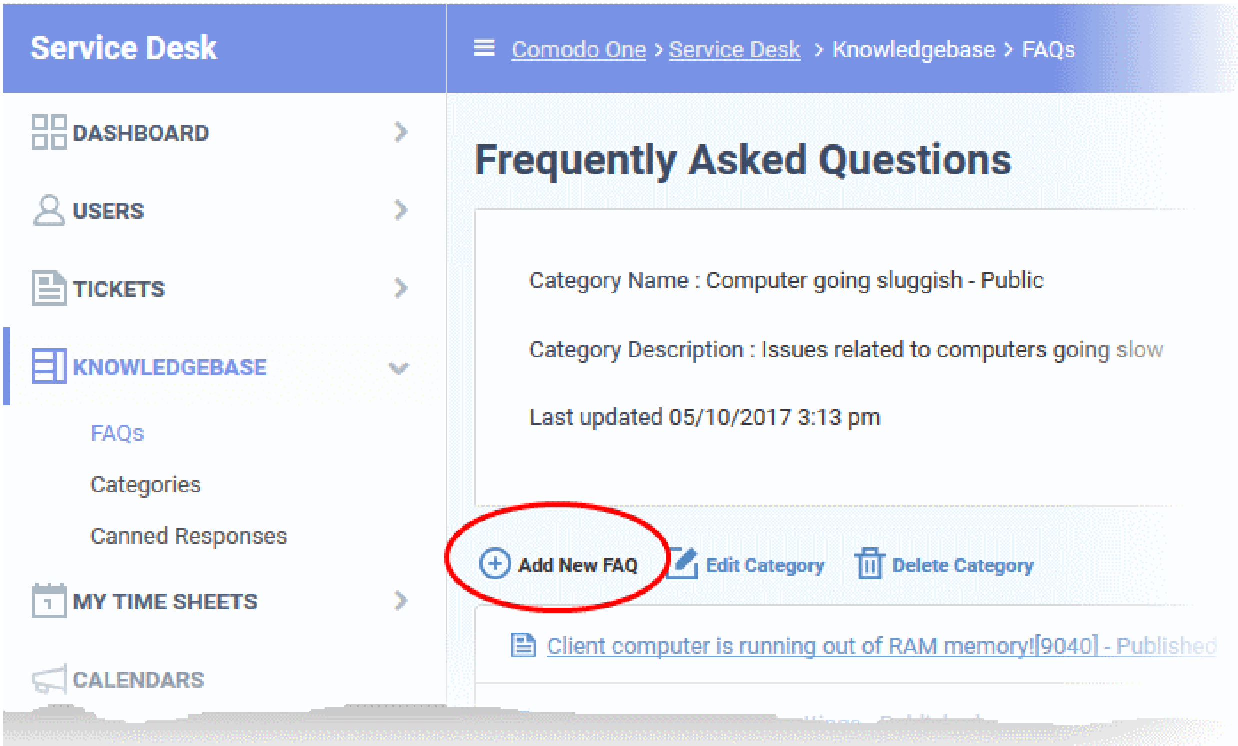
The 'Add New Category' screen will be displayed.

- **Category Type:** Choose 'Public' for the FAQs added under this category to be available in the support center page.
- **Visible for Role:** Choose 'All' to allow all staff members of any role and users to view the FAQs under this category
- **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.
- **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.

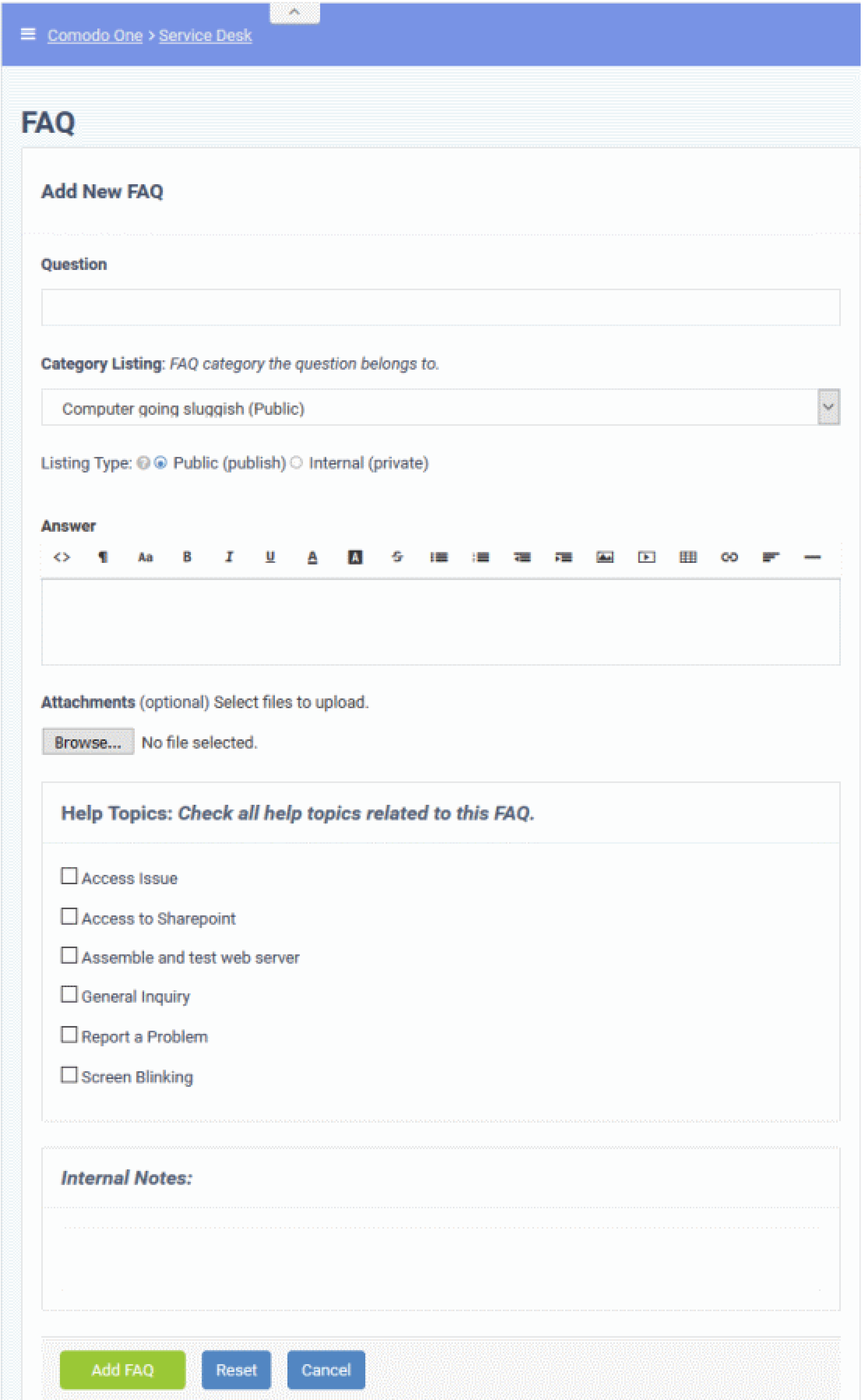
- Click the 'Add' button to save the category.
- Repeat the process to add more categories.

To add FAQs in a category

- Open the 'Staff Panel'
- Click 'Knowledgebase' > 'FAQs'
- Click the name of the category to which you want add a FAQ.
- Click on 'Add New FAQ'



The 'Add New FAQ' screen will be displayed.



- **Question:** Enter the question label. For example, 'How do I change my account password?'.
- **Category Listing:** By default the category chosen from the 'Settings > FAQs' page will be

selected. If you want to change the category, choose the new category from the drop-down

- **Listing Type:** Choose 'Public', for the FAQ to be visible to the users in the support center page.
- **Answer** : Enter the solution for the question in the text field.
- **Attachments:** Click 'Browse' to add attachments to the FAQ. Attachments you add here will be available for download from the support center page.
- **Categories:** 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 support center page.
- **Internal Notes:** Add internal notes, if any, for the FAQ. This will be visible only to the staff and the administrators.

- Click the 'Add FAQ' button at the bottom.

The FAQ entry will be added and published. It will be listed under the respective category in the support portal.

- Repeat the process for adding more FAQ entries.

Create ticket categories and ticket stages to route tickets to the appropriate departments (Optional)

- 'Ticket Categories' are help topics which end-users can select when creating a ticket.
- Ticket categories are placed at the ticket creation stage and are usually prefixed with statements like 'Please choose the type of support you need:'
- For example, you might have ticket categories called 'Billing', 'Technical Support', 'Account Changes', etc.

Ticket categories can help your business to:

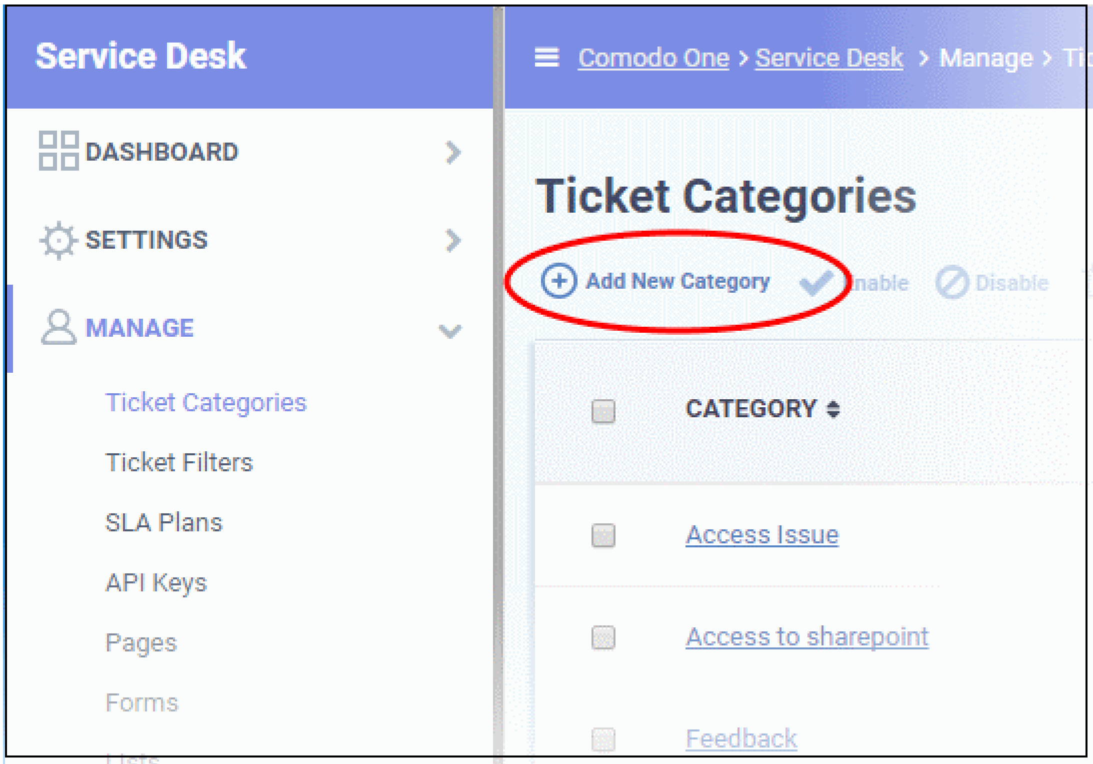
- Route tickets to the appropriate department and staff
- Choose which form is shown to the end-user. You can create custom forms to collect information specific to a certain request type. See later if you want help with this.
- Choose the service level agreement (SLA)
- Set the priority of the ticket
- Set which auto-responder and thank-you pages are shown after ticket creation
- You can also set certain ticket categories to generate multi-stage tickets, where two or more steps must be completed by your company before the ticket is resolved.

To add a Ticket Category

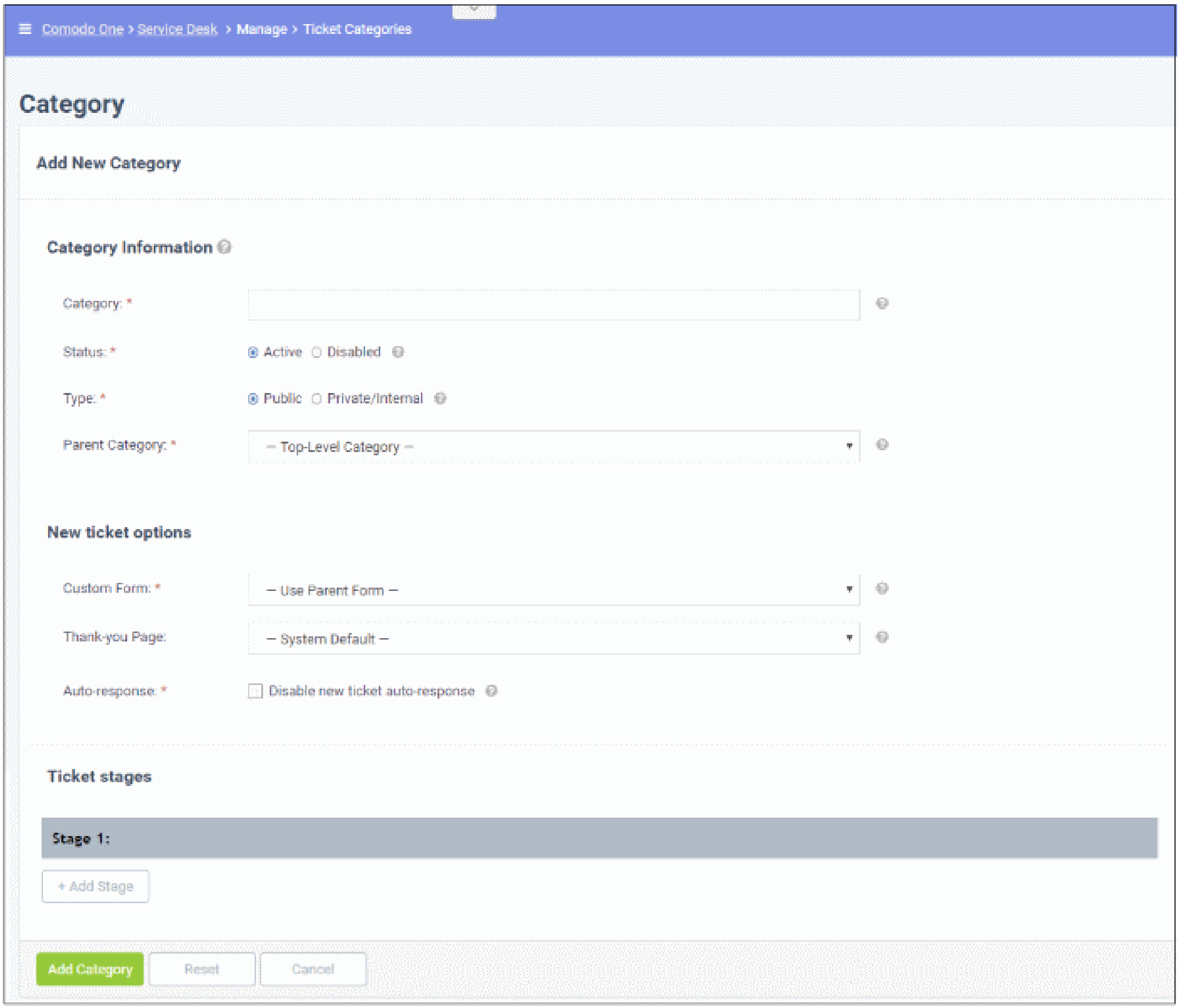
- Open the 'Admin Panel'
- Click 'Manage' > 'Ticket Categories'

The list of available 'Ticket Categories' will be displayed.

- Click 'Add New Category'



The 'Add New Category' screen will be displayed.



Category Information

- **Category**: Enter a unique name for the ticket category.
- **Status**: Select whether the ticket category should be active or not. Only active ticket categories will be available for selection. You can change the status at any time using the 'Enable'/'Disable' links in the 'Category' interface.
- **Type**: Choose 'Public' to make the ticket category available for selection on the support center page
- **Parent Category**: If you are creating a child ticket category then please specify the master category for the item. For example, you might create a parent category called 'Technical Support' which contains 'Operating System Issues' and 'Email Issues' as the child categories.

New Ticket Options

- **Custom Form**: Select the form that should be shown to users if they select this category. You can do this even after creating the ticket category. Custom forms are explained later in this section in **Create custom forms to gather information which is essential to answer a request (optional)**.
- **Thank-You Page**: Choose the confirmation page that will be shown after submitting a ticket with this category. Thank-you pages are shown to guest users only. See **Client Portal Pages** if you need help to configure client portal pages.
- **Auto-response**: Determines whether an automatic email should be sent to the user. This setting overrides the auto-responder settings for the selected **Department** and **global Autoresponder** settings.

Ticket Stages

- Ticket stages allow you to set up a 'step-by-step' process for dealing with requests on a particular category.
- Each stage can be configured to route and prioritize the ticket at various phases of its life-cycle. Each stage allows admins to define the department, priority, SLA and person that the ticket should be assigned to.

By default, each ticket category will have at least one stage. The stage attributes allow administrators to:

  - Route ticket to departments like maintenance, sales or support
  - Change the priority to low, normal, high or critical.
  - Redefine SLA plan
  - Auto-Assign to staff / agent

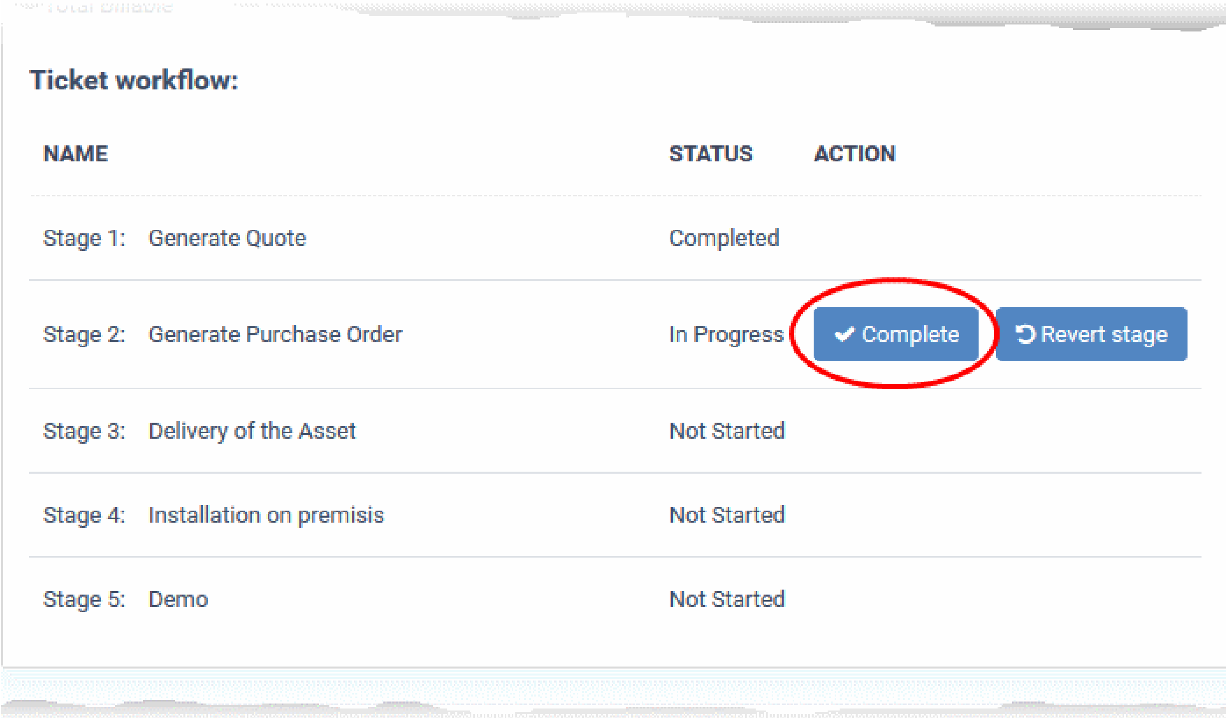
- Click the 'Stage Number' stripe to add/edit the following parameters:

  - **Stage name:** Enter a label for the stage. For example, 'Issue Evaluation' or 'QA & Testing'.
  - **Department**: Select the department that the ticket should be routed to at this stage in its lifecycle.

- **Priority**: Select the priority level for tickets with this ticket category. Options are Low, Normal, High and Critical.
- **SLA Plan**: Select the service level agreement associated with tickets on this category. See **Service Level Agreements (SLA)** for more details on SLAs
- **Auto-assign To**: Select the staff member or team that the ticket should be assigned to at this stage. Please note the assignments configured in **Ticket Details** will override this setting.
- **Admin Notes:** Add any notes related to the ticket category for internal purpose. This will not be visible in the client portal.

- Click 'Add Stage' to create another step for the ticket category

Note: The stages are listed under 'Ticket Workflow' in the 'Ticket Details' interface. On completion of a stage by the technician attending to it, the technician should click the 'Complete' button beside the stage.



The ticket will be automatically assigned to the Department/Staff member of the next stage. See **Ticket Details** for more details.

- Click the 'Add Category' button at the bottom of the screen for the settings done in the page to take effect.

See the section **Ticket Categories** for more details.

Create Custom Forms to gather information which is essential to answer a request (optional)

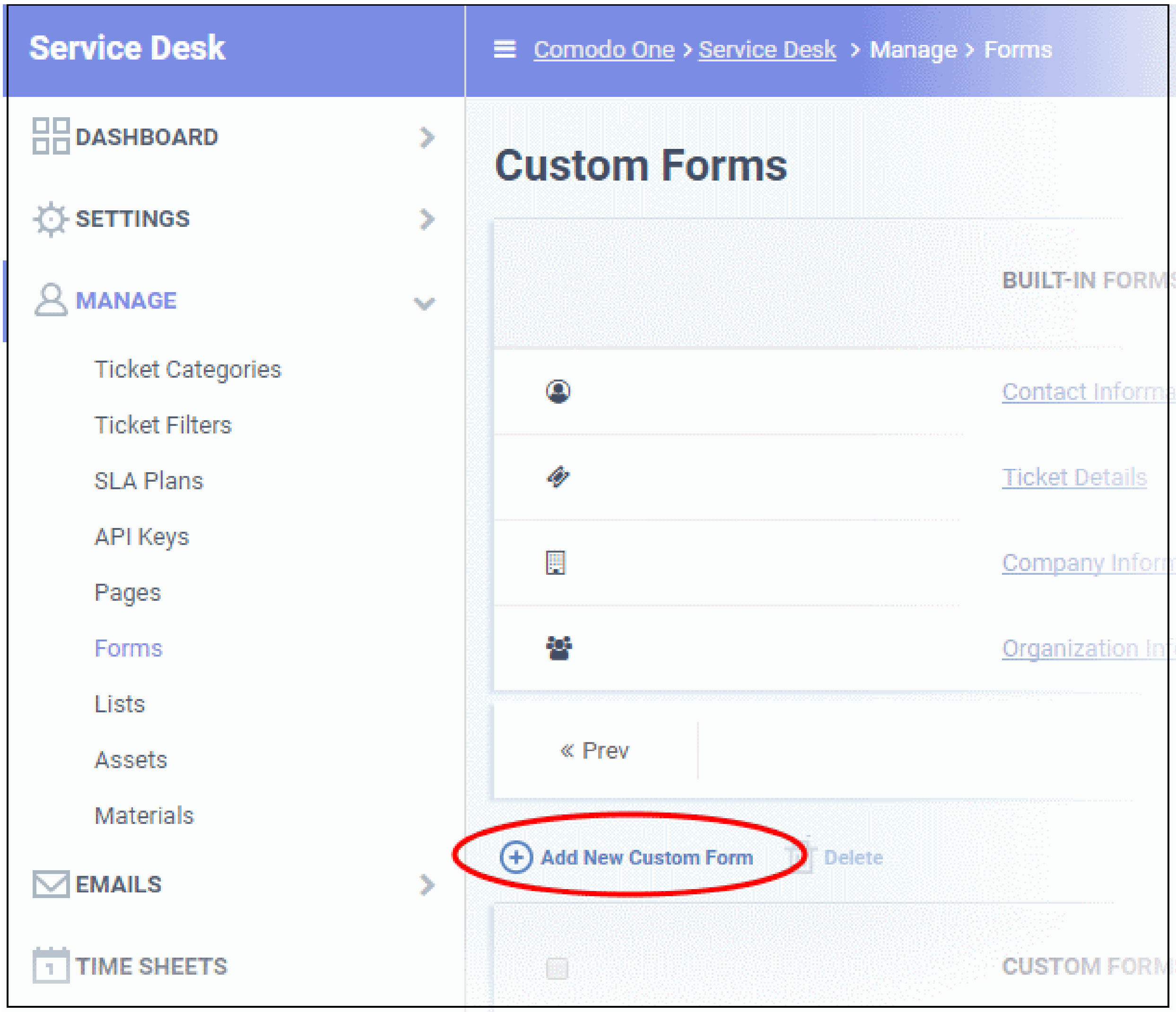
- You can configure service desk to show a custom form to users when they select a specific ticket category.
- You can modify the fields on a custom form to collect the exact information that your team will need to answer questions on a certain category.
- You can create custom forms in the 'Forms' interface and associate them with ticket categories in the 'Category' interface.

To create a custom form

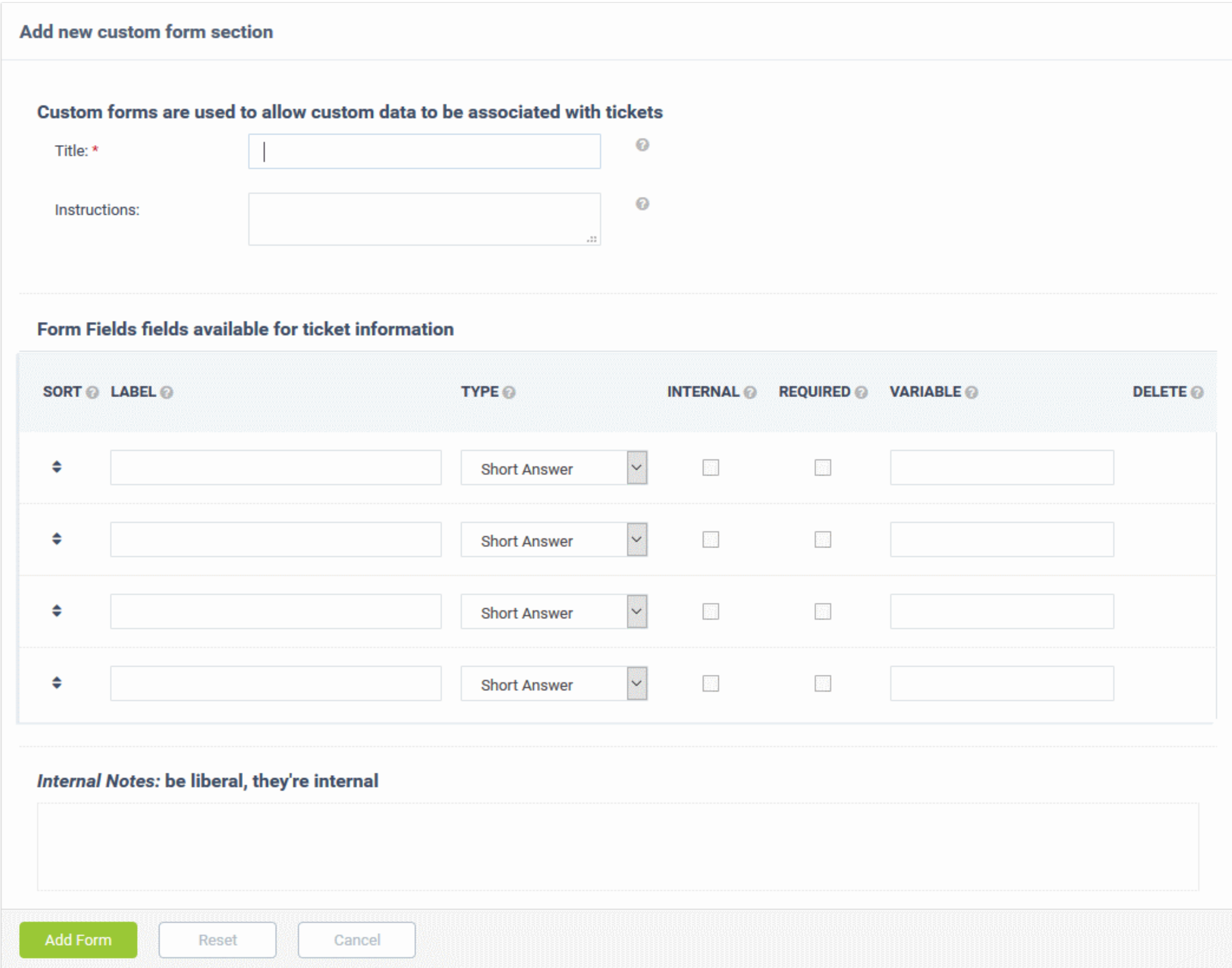
- Open the 'Admin Panel'
- Click 'Manage' > 'Forms'

The list of available 'Built-in' and 'Custom' forms will be displayed.

- Click on 'Add New Custom Form'



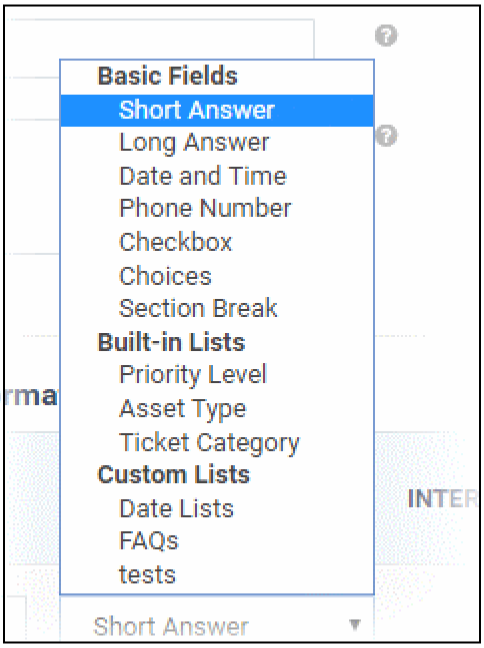
The 'Add new custom form section' interface will appear to create a form with required form fields:



- **Title:** Enter the title of the form. This will be displayed as the section title of the form in the 'Open a New Ticket' interface of the Support Center page.
- **Instructions:** Enter instructions to be shown to the user for filling the details in the form.

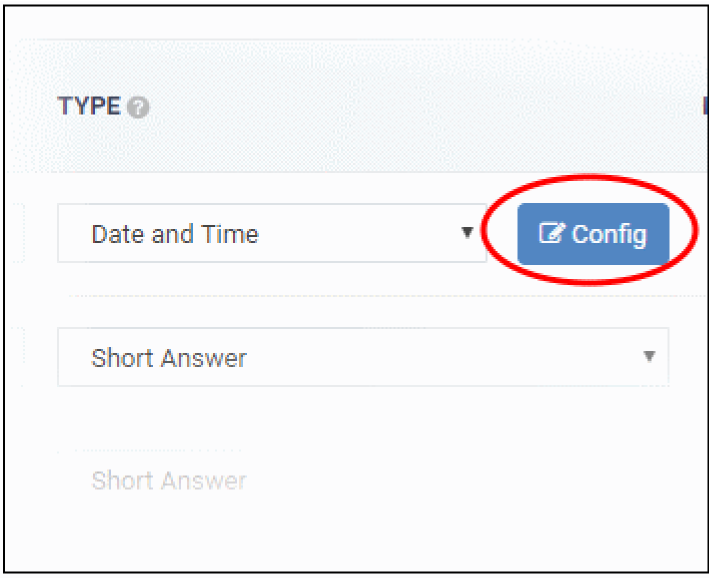
The list of fields to be included in the form is displayed as a table. Enter the details for each form field one-by-one as described below:

- **Sort:** Drag and drop to sort the field rows that will be displayed in the same order in the client portal for the ticket
- **Label:** Enter the name of the field label that will be displayed in the 'Open a New Ticket' interface
- **Type:** Select the type of input expected from the user. The options available are short answer, long answer, date and time, phone number, checkbox, choices and section break. In addition, you can select from built-in lists and custom lists. See **Appendix 1 - Field Types in Custom Forms and Custom Lists** for more details on field types.

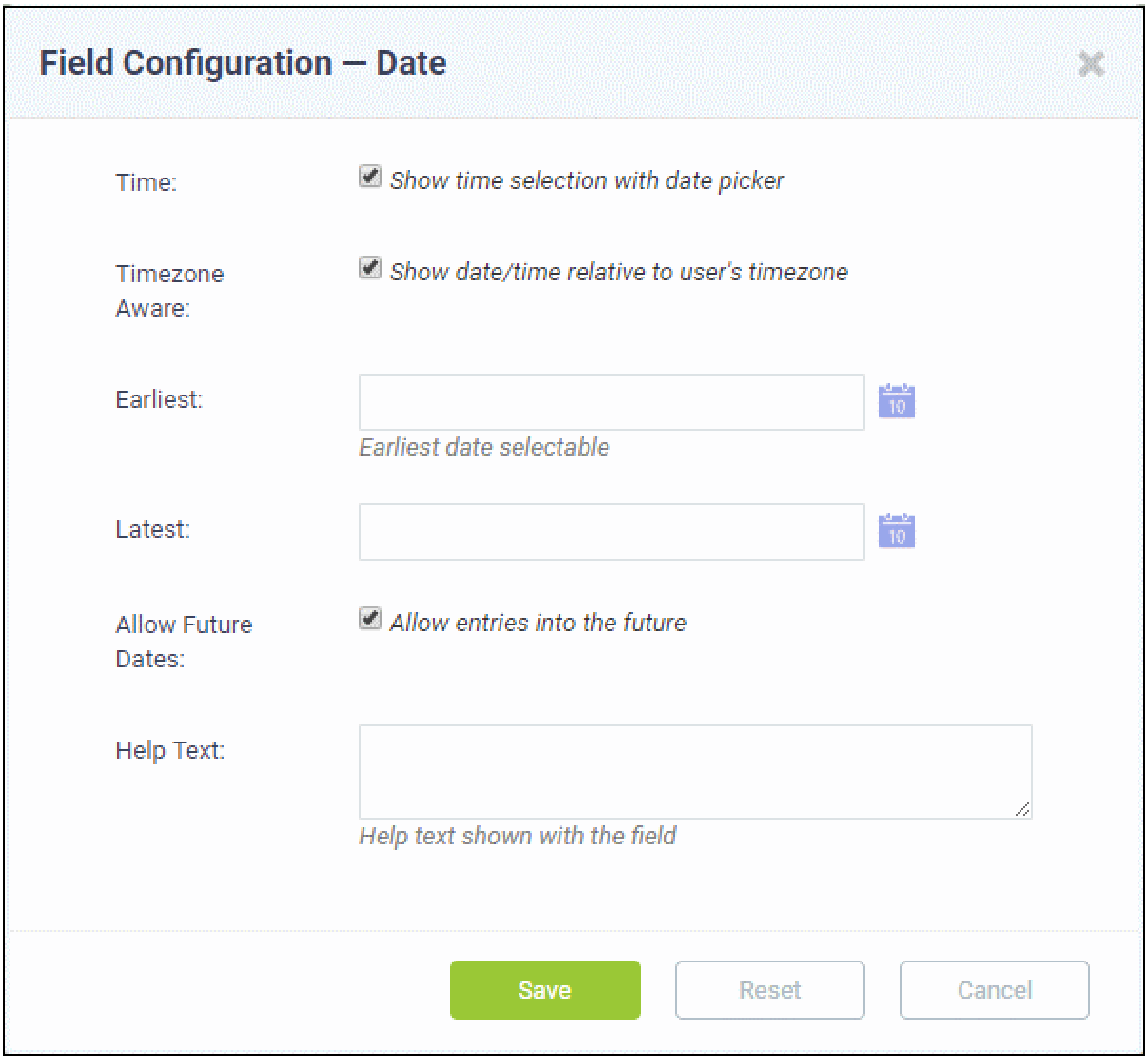


- **Internal**: Leave this option unselected for the form field to be available in the the 'Open a New Ticket' interface of the support center page.
- **Required:** If selected, the field is marked as mandatory. The ticket cannot be saved or submitted until valid data is entered/selected for the field.
- **Variable:** Enter the variable name for the field data that can be used in email templates for sending automated messages. For example if you use the variable name 'model' for the Model Number field, then the variable %{model} can be used in email templates for fetching the values entered in this field. See '**Email Templates**' for more details.
- **Delete:** To delete a field from the form, select the check box and click the 'Save Changes' button at the bottom to remove the selected form.
- Click 'Add Form' to save the form

After saving the form, the configuration option for each one of the form fields will be available.



- Clicking on the 'Config' button beside a form field will display the properties screen for the selected field. This property screen depends on the type of form parameter chosen. For example, the property screen for Date is shown below:



- Configure the field as required and click 'Save'

Repeat the process for configuring each field

- Click 'Save Form'

The from will be now available for associating with a ticket category.

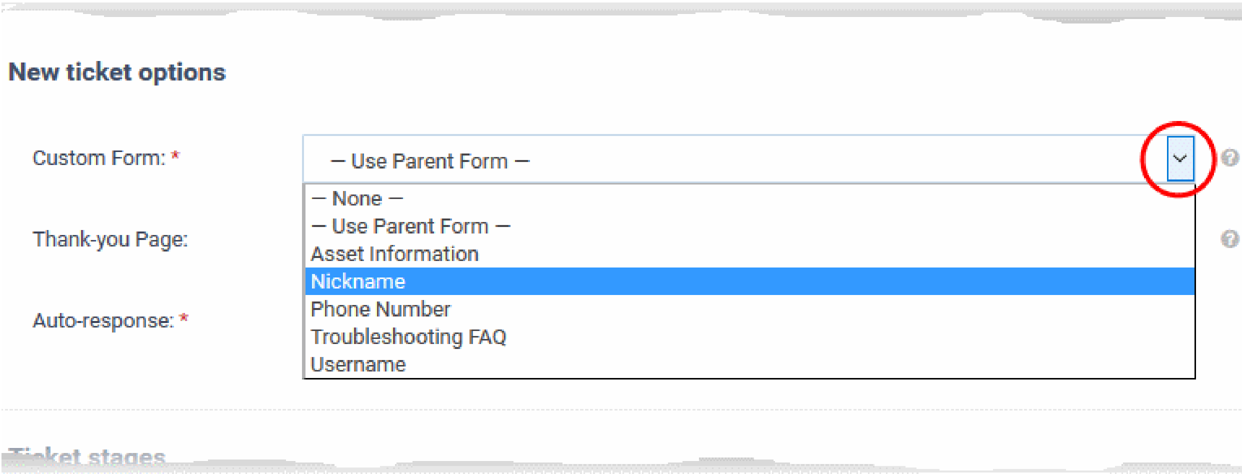
- Repeat the process to add more custom forms.

To associate a custom form to a ticket category

- Open the 'Admin Panel'
- Click 'Manage' > 'Ticket Categories'

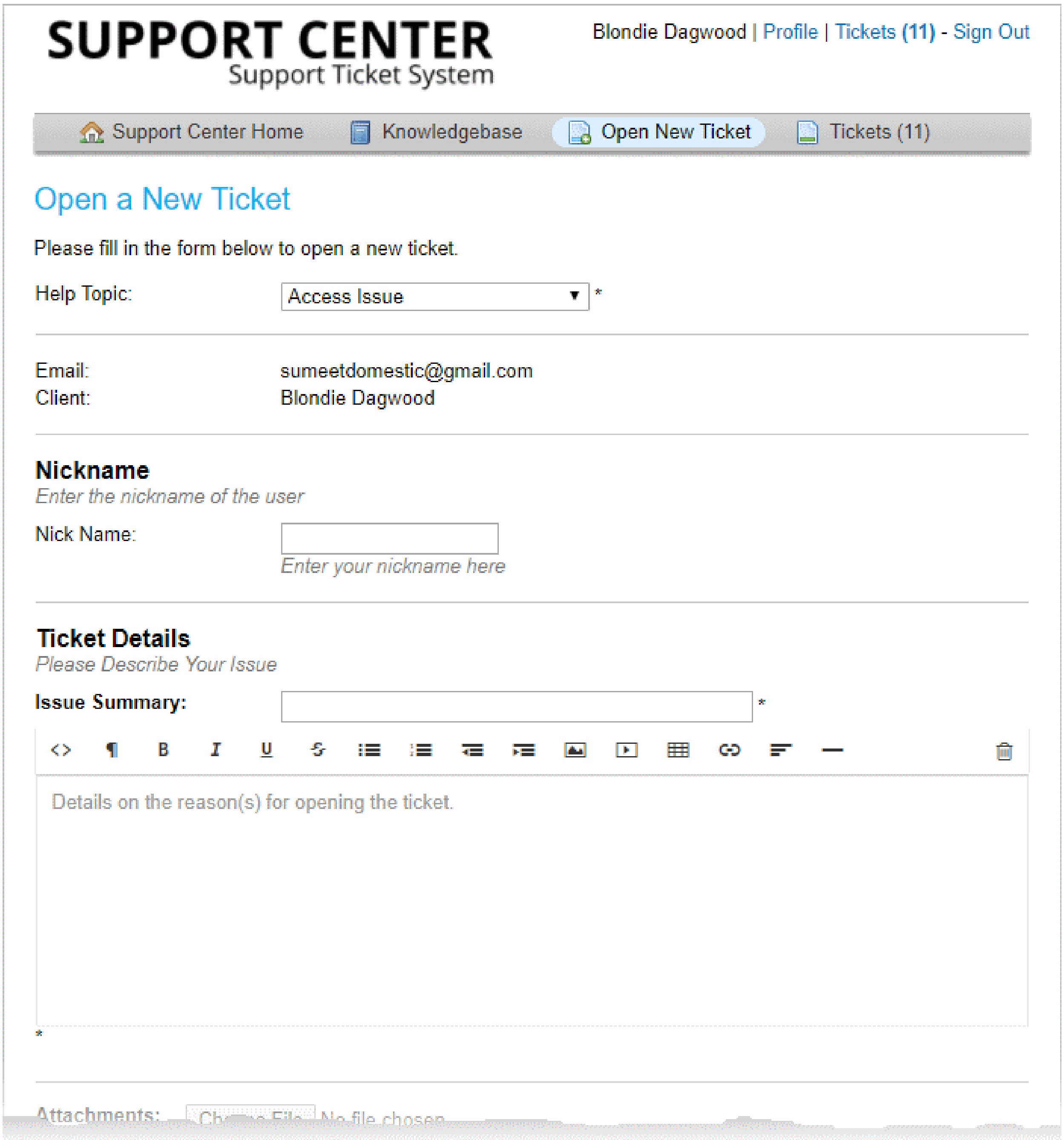
The list of available 'Ticket Categories' will be displayed.

- Click the ticket category to which you want to add a custom form
- Choose the custom form to be associated with the ticket category from the 'Custom Form' drop-down under 'New Ticket Options'



- Click 'Save Changes'

The selected form will be displayed along with the standard 'Built-in' form in the 'Add a New Ticket' interface of the support center page, when the user chooses the ticket category.



The data entered in these fields by the user will be displayed to the technician attending to the ticket, in the **Ticket Details** interface. Getting granular details specific to the issue type helps technicians to quickly diagnose the issue and resolve it.

Create canned responses so staff can quickly answer common questions (optional)

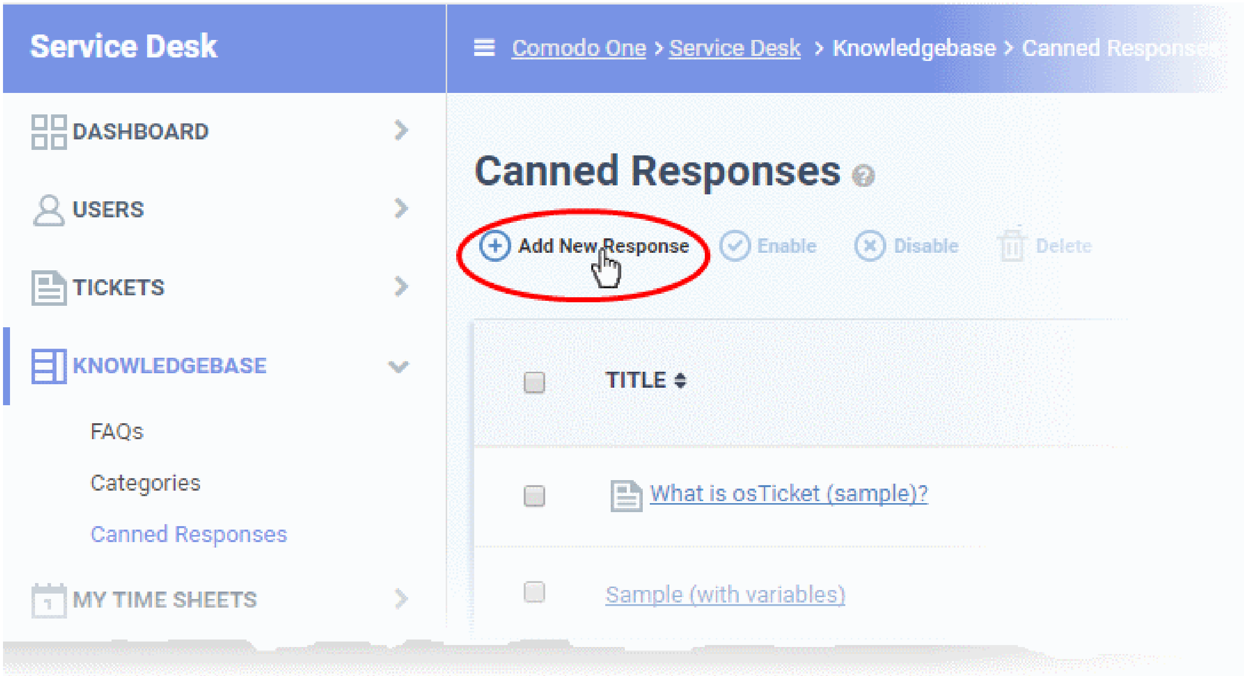
- Canned responses are pre-defined messages which can be used in reply to user support requests.
- Staff can quickly insert these messages as answers to common or routine issues when replying to a ticket.
- Service Desk allows admins and staff to create a repository of canned responses.
- You can also insert variables like user name and ticket number so that canned responses will contain values pertinent to each ticket.

To add and manage canned responses

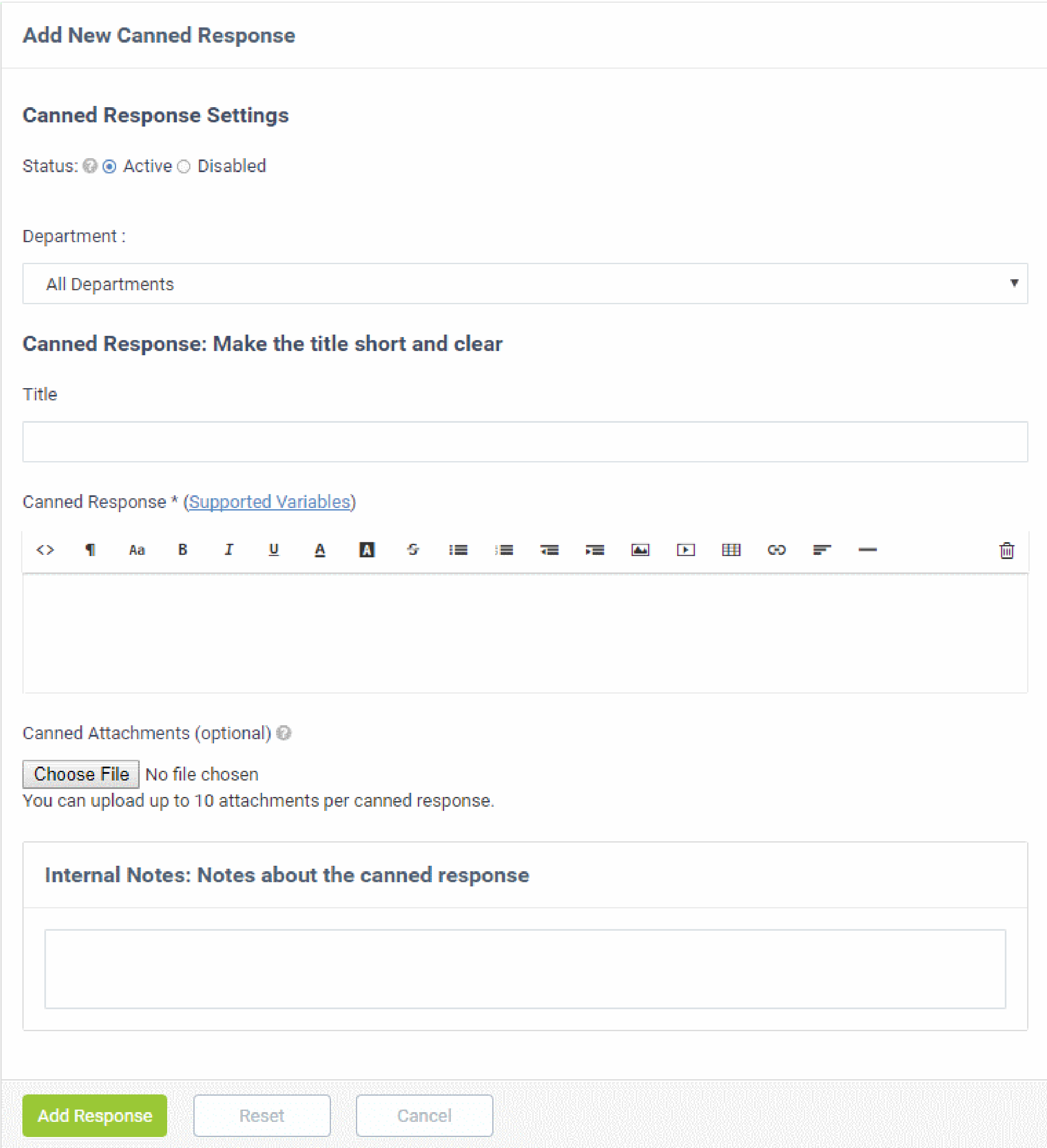
- Open the 'Staff panel'
- Click 'Knowledgebase' > 'Canned Responses' on the left

The list of canned messages will appear.

- Click 'Add New Response'



The 'Add New Canned Response' interface will open.



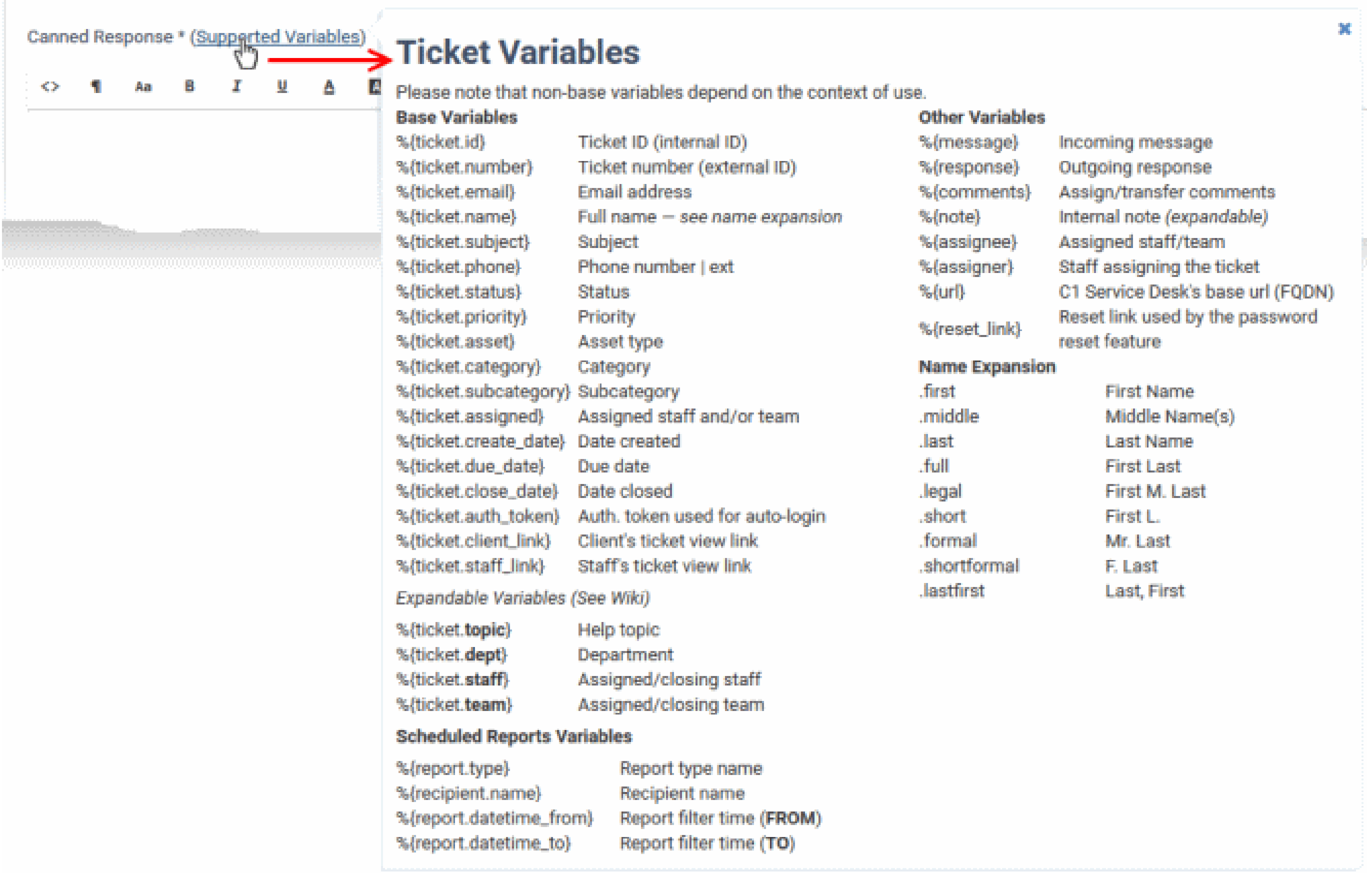
Canned Response Settings

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

Canned Response

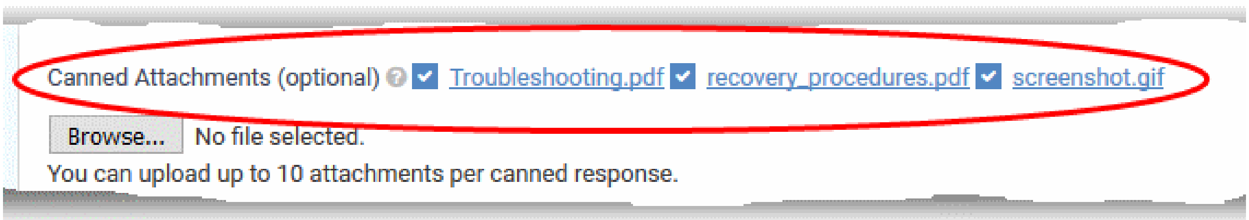
- **Title:** Enter a suitable title for the pre-made reply.

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



- To clear the text, click the trash can icon at the top right.

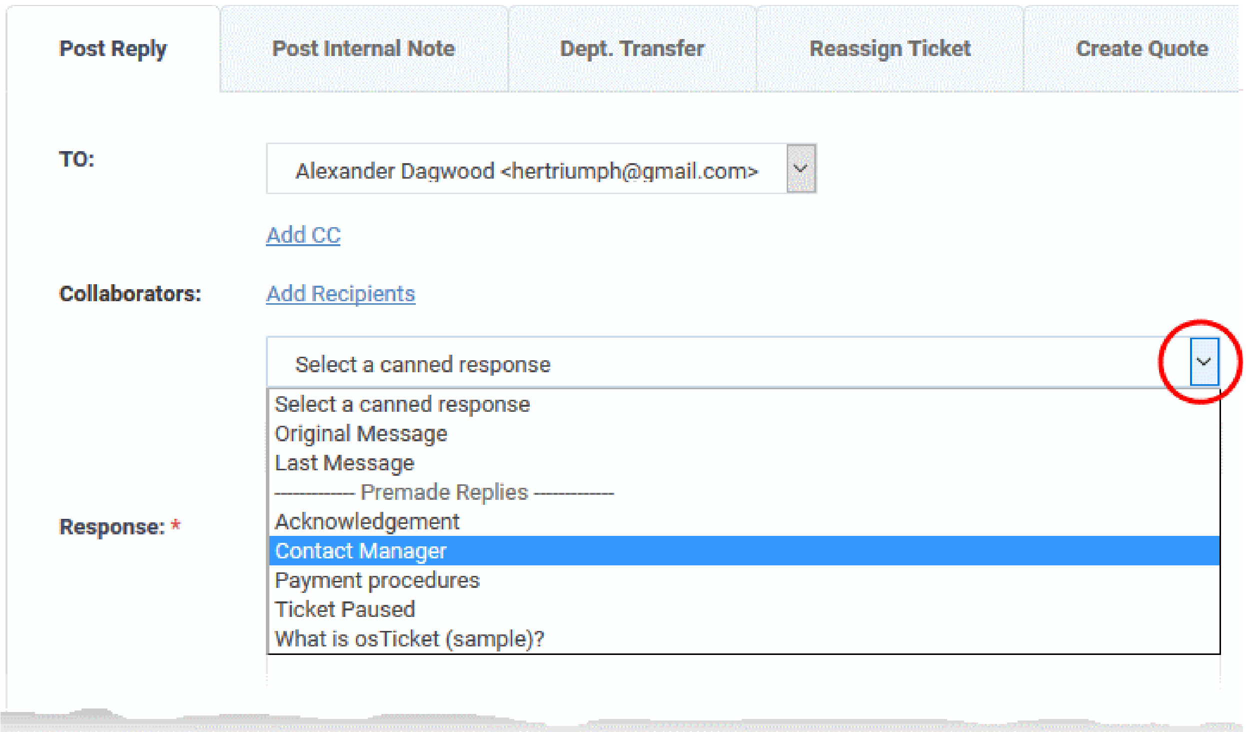
- **Canned Attachments**: To add attachments to the reply, click the 'Browse' button, navigate to the location of the file and select the file to be attached. You can attach a maximum of 10 files per 'Canned Response., but one at a time. To append more attachments, **edit** the 'Canned Response' and add the attachments one-by one.
  - To remove an attachment, clear the checkbox beside the attachment



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.
- Repeat the process to add more canned responses.

Canned responses will be available for selection in the 'Ticket Details' interface when a technician is attending to a ticket:

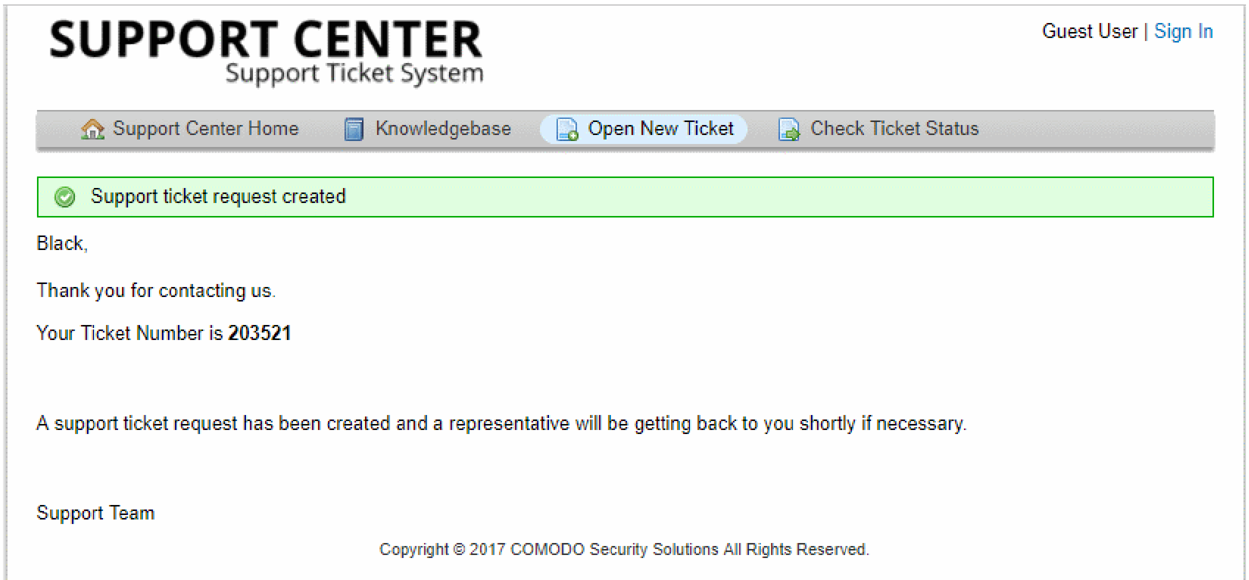


See **Ticket Details** for more details.

Create custom 'Offline' and 'Thank you' pages (optional)

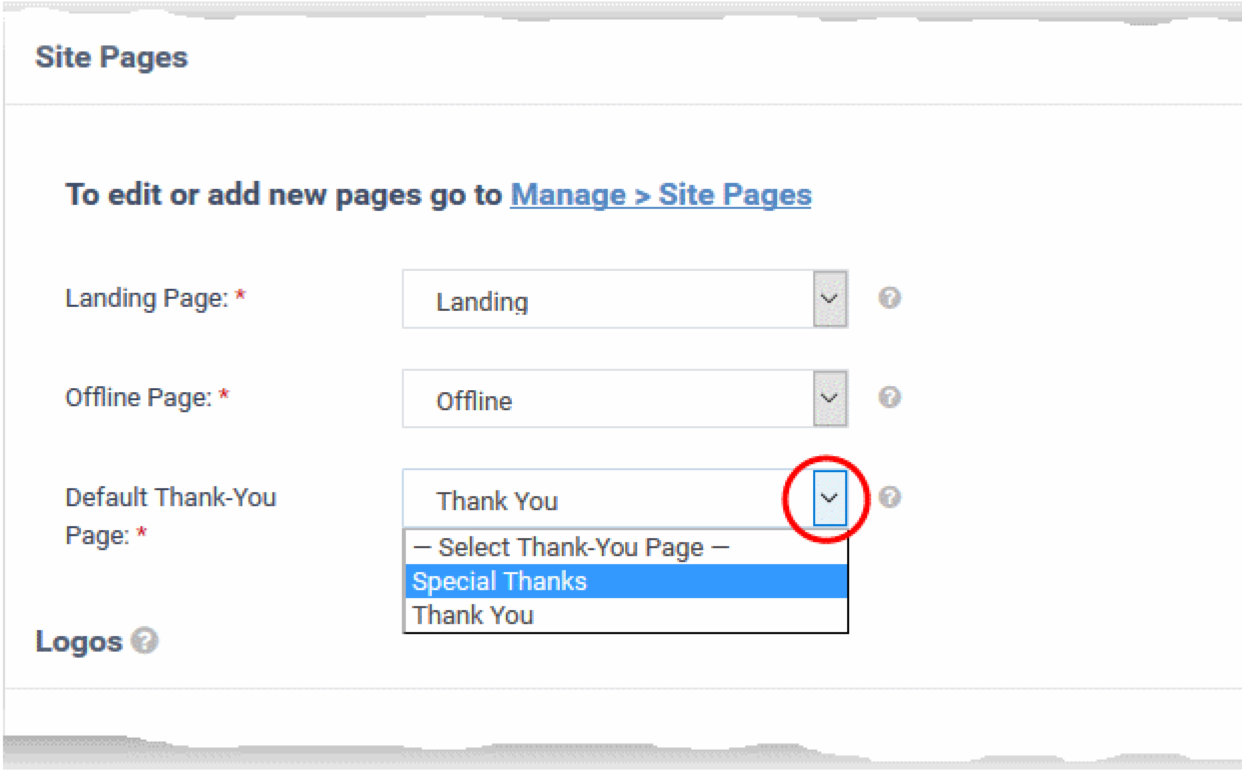
Thank You page

The Support Center displays a 'Thank you' message with a default content whenever a guest user submits a ticket. An example is shown below:



You can customize the message content as required.

- The 'Thank You' message is as defined in the 'Thank You' page configured for your company
- You can create several 'Thank You' pages with different content for different scenarios and choose one at a time, to be used .See **Client Portal Pages** for details on creation of 'Thank You' page messages
    - To select a 'Thank You' page, Click 'Settings' > 'Company' from the service desk admin interface.
    - Choose the page to be used for the thank you message from the 'Default Thank-You Page' drop-down under 'Site Pages'

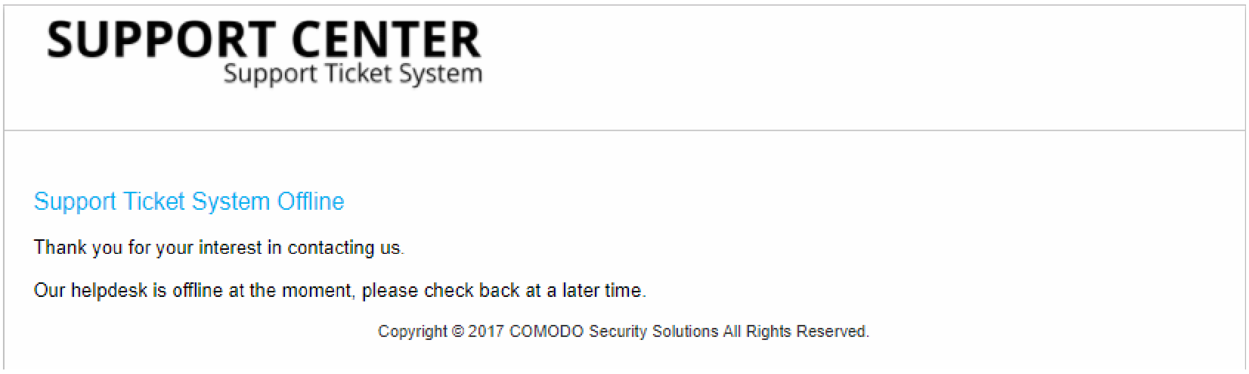


- Click 'Save Changes' for your settings to take effect

See the explanation of **Site Pages** in the section **Configuring Company Profile** for details on selection of the page to be displayed.

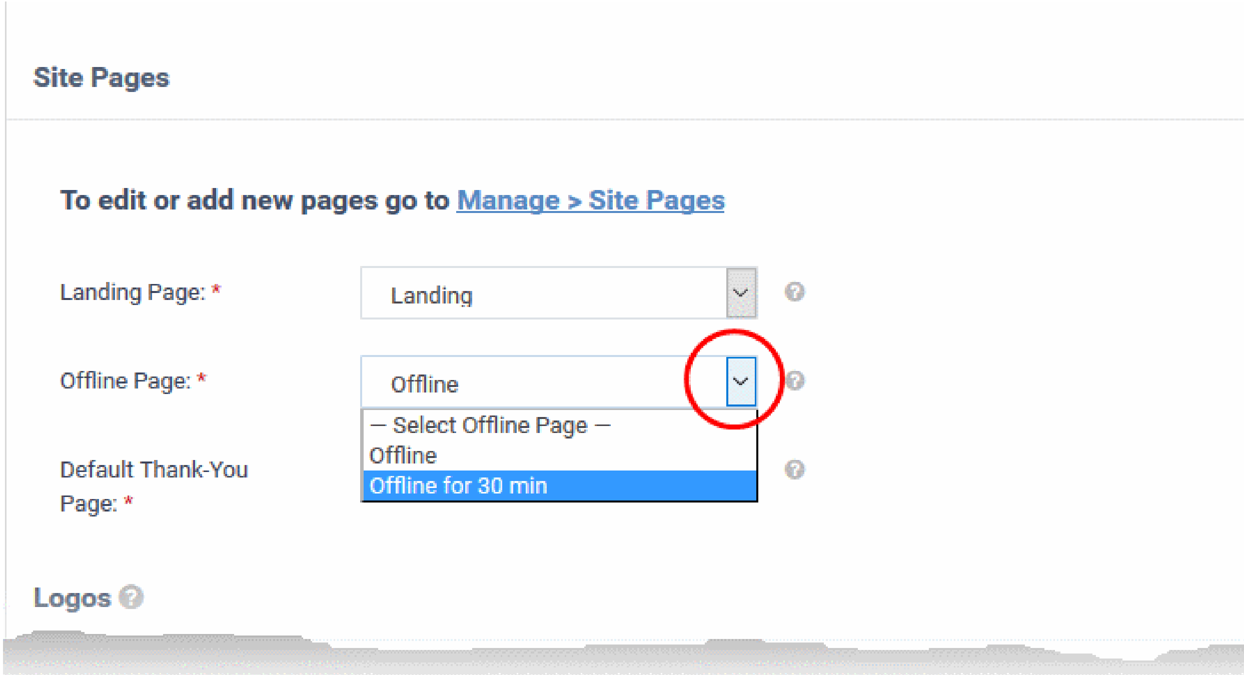
Offline Page

The Support Center page displays a message indicating that the support ticket system is offline, whenever the support center is disabled for some reasons. See **C1 Service Desk System Settings** for details on enabling and disabling the support center. An example offline page is shown below:



You can customize the message content for different situations and scenarios as required.

- The 'Offline' message is as defined in the 'Offline' page configured for your company
- You can create several 'Offline' pages with different content and choose one at a time, to be used .See **Client Portal Pages** for details on creation of 'Offline' page messages
    - To select a 'Offline' page, Click 'Settings' > 'Company' from the service desk admin interface.
    - Choose the page to be used for the offline message from the 'Offline Page' drop-down under 'Site Pages'



- Click 'Save Changes' for your settings to take effect

See the explanation of **Site Pages** in the section **Configuring Company Profile** for details on selection of the page to be displayed.

2.3.6 Forms

Service Desk has two kinds of forms that are used in various interfaces - Built-in Forms and Custom Forms.

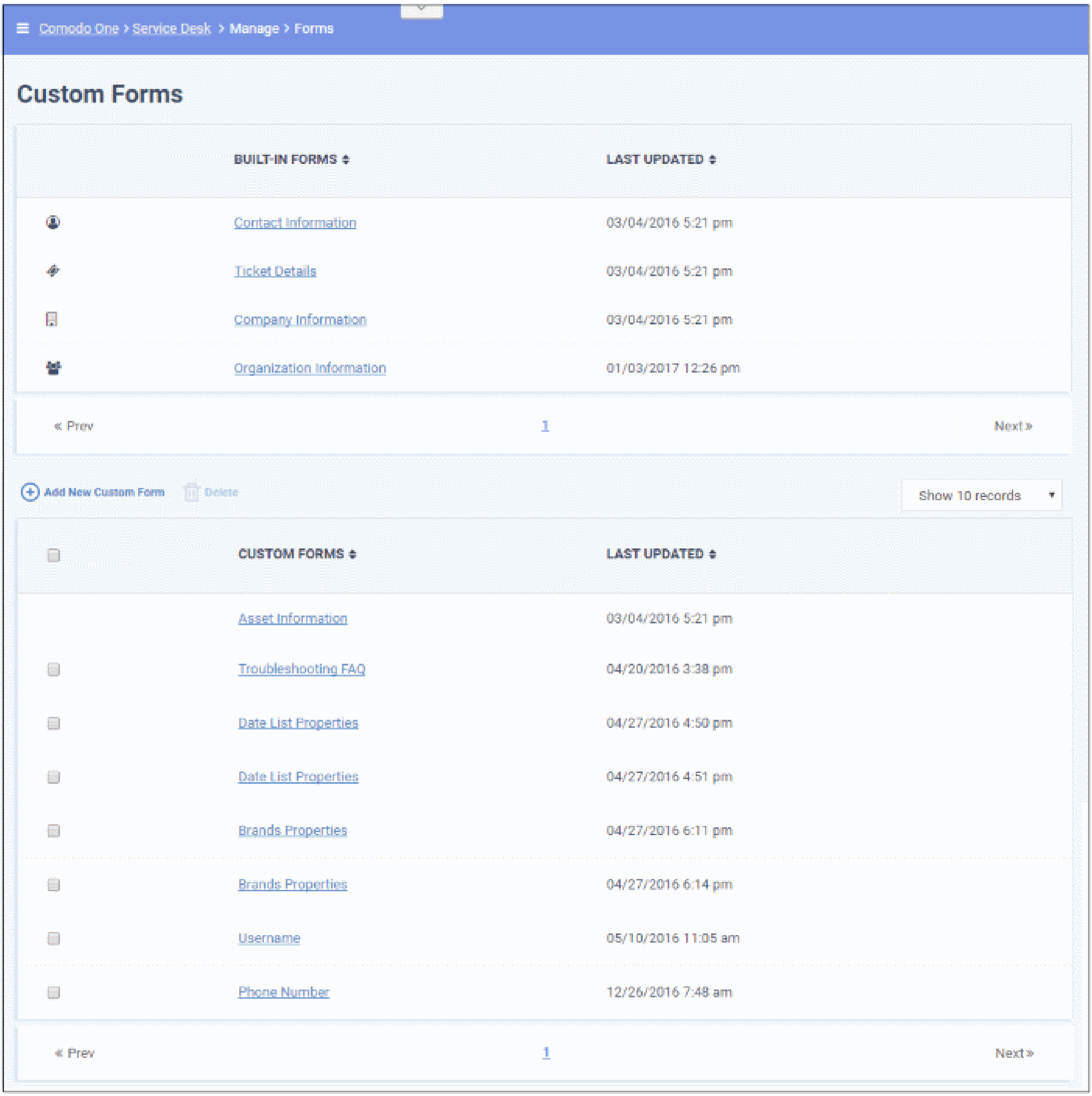
Built-in Forms can be edited to your needs and more fields can be added according to an organization's requirement. The built-in forms are available in the following categories:

- **Company Information** - Used in the **Company Profile** screen under the 'Settings' tab.
- **Organization Information** - Used in the Staff Panel for '**Managing Organizations**'
- **Ticket Details** - Displayed in the client portal while creating a ticket
- **Contact Information** - Displayed in the client portal while creating a ticket.

Custom Forms can be created to collect the specific data required by your organization.

To open the 'Custom Forms' interface

- Click 'Manage' on the left then 'Forms' in the Admin Panel



Column Headers

- **Built-in Forms:** The default built-in forms that can be only edited. **Click here** for details about editing built-in forms.
- **Custom Forms:** Displays the list of custom forms that can be edited or removed
- **Last Updated:** The date and time the form was edited and updated

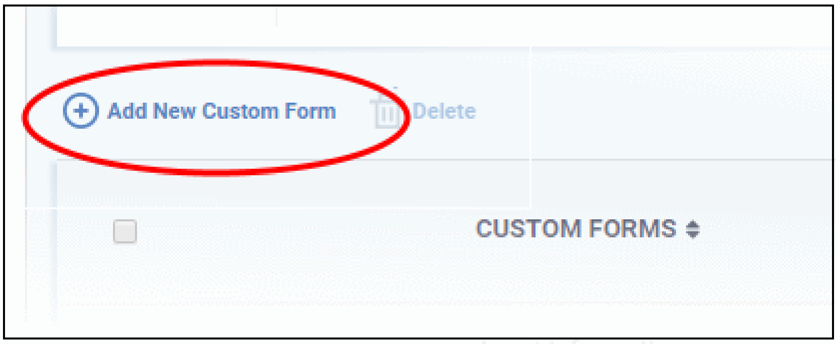
Sorting the items

- Clicking on a column header sorts the items in ascending/descending order of entries in that column.

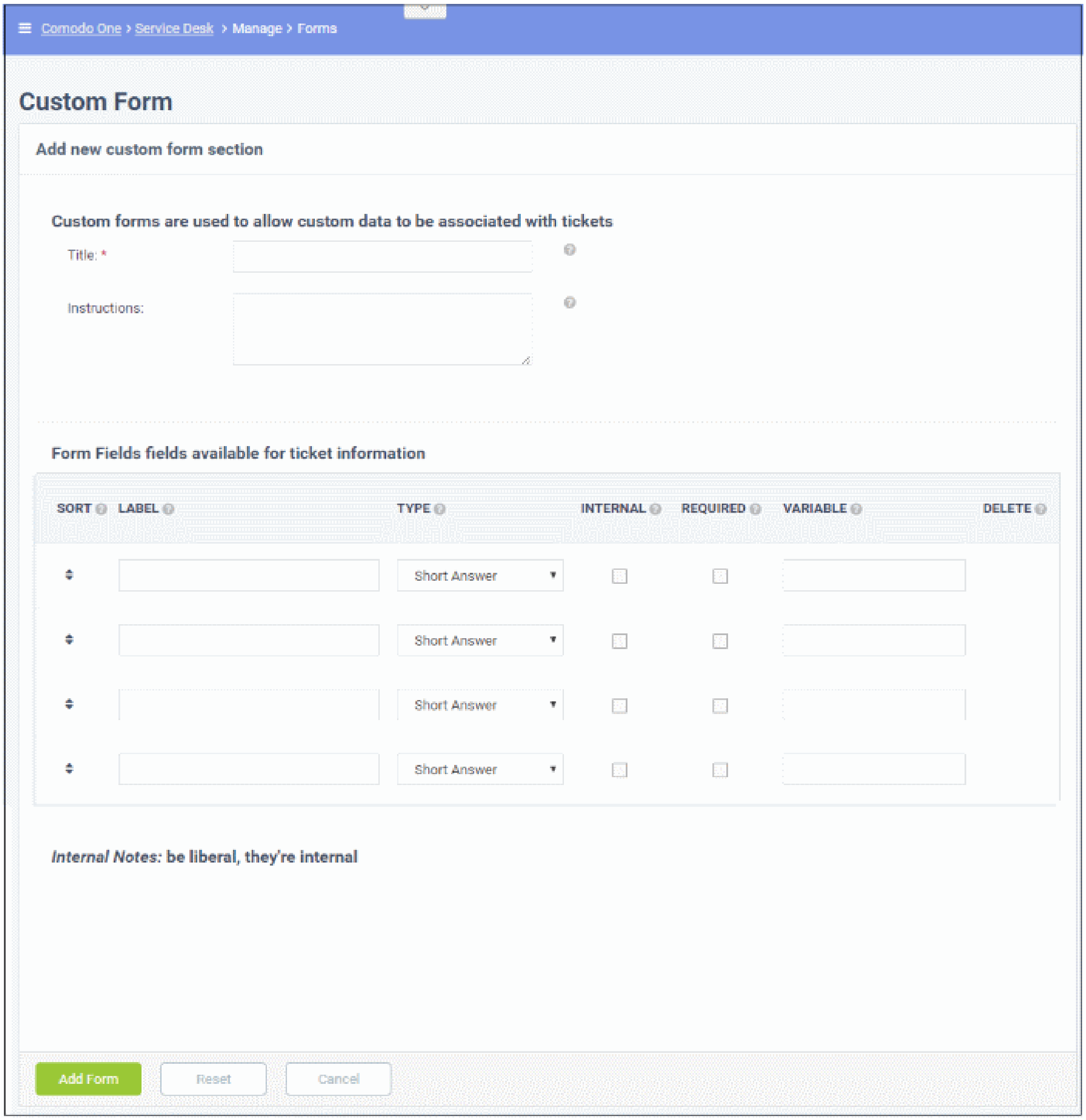
The 'Show records' drop-down on the right of Custom Form section allows you to select the number of custom forms to be displayed per page. The options range from 10 forms per page up to 100 forms per page. You can navigate to different pages by clicking 'Next' and 'Prev' at the bottom.

To add a new custom form

- Click the 'Add New Custom Form' link at the top



The' Add New Custom Form Section' screen will be displayed:

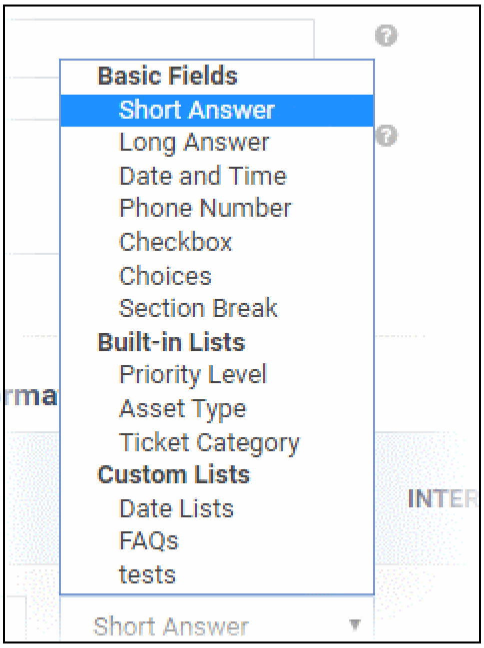


New Custom Form

- **Title:** Enter the title of the form. This will be displayed as the section title of the form in the ticket.
- **Instructions:** Enter the text to provide useful instructions for the user such as 'Please select the options' or Please fill the fields below'.

Form Fields

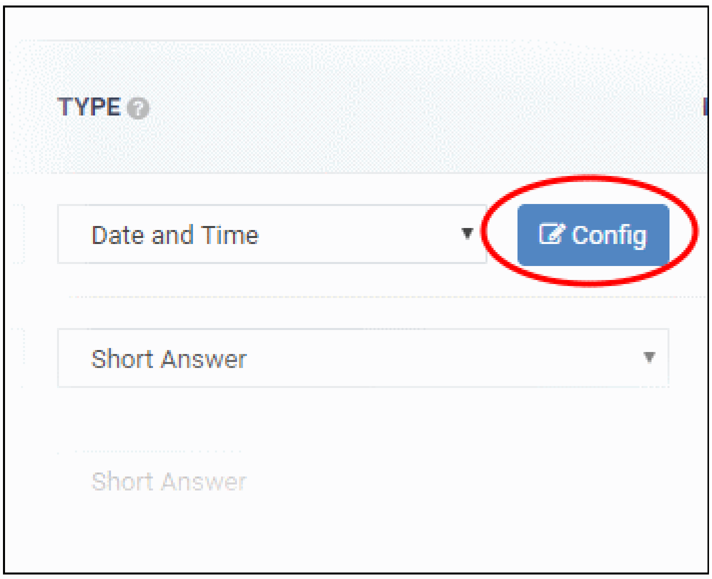
- **Sort:** Drag and drop to sort the field rows that will be displayed in the same order in the client portal for the ticket
- **Label:** Enter the name of the field label that will be displayed in the client portal for the ticket
- **Type:** Select the type of input expected from the user. The options available are short answer, long answer, date and time, phone number, checkbox, choices and section break. In addition, you can select from built-in lists and custom lists. See **Appendix 1 - Field Types in Custom Forms and Custom Lists** for more details on field types.



Built-in lists cannot be edited but can be made public or kept internal. Administrators can add new custom lists and each item can be further defined with required parameters. See **Custom Lists** for more details.

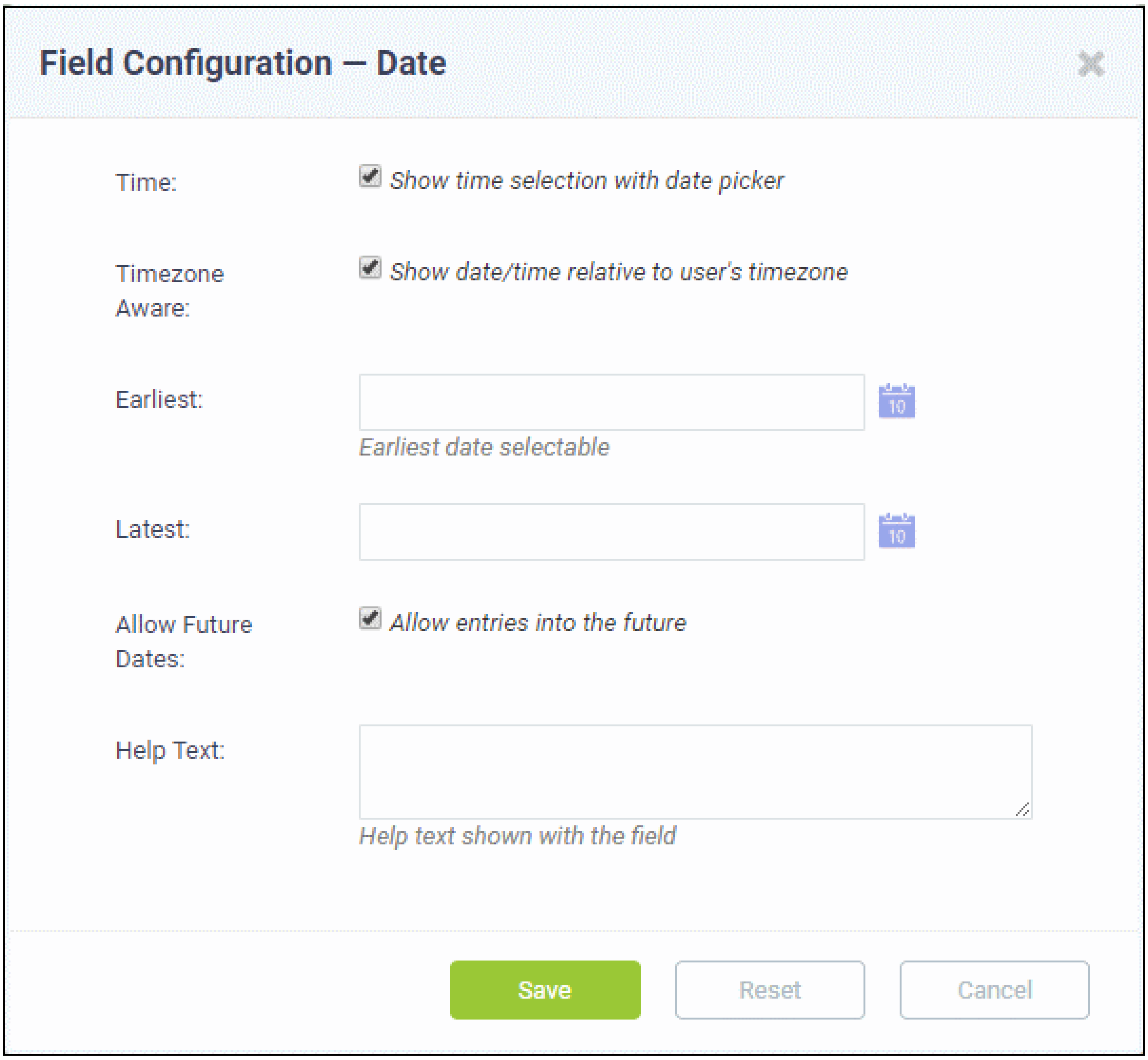
- Click 'Add Form' to save the form

After saving the form, the configuration option for each one of the form fields will be available.



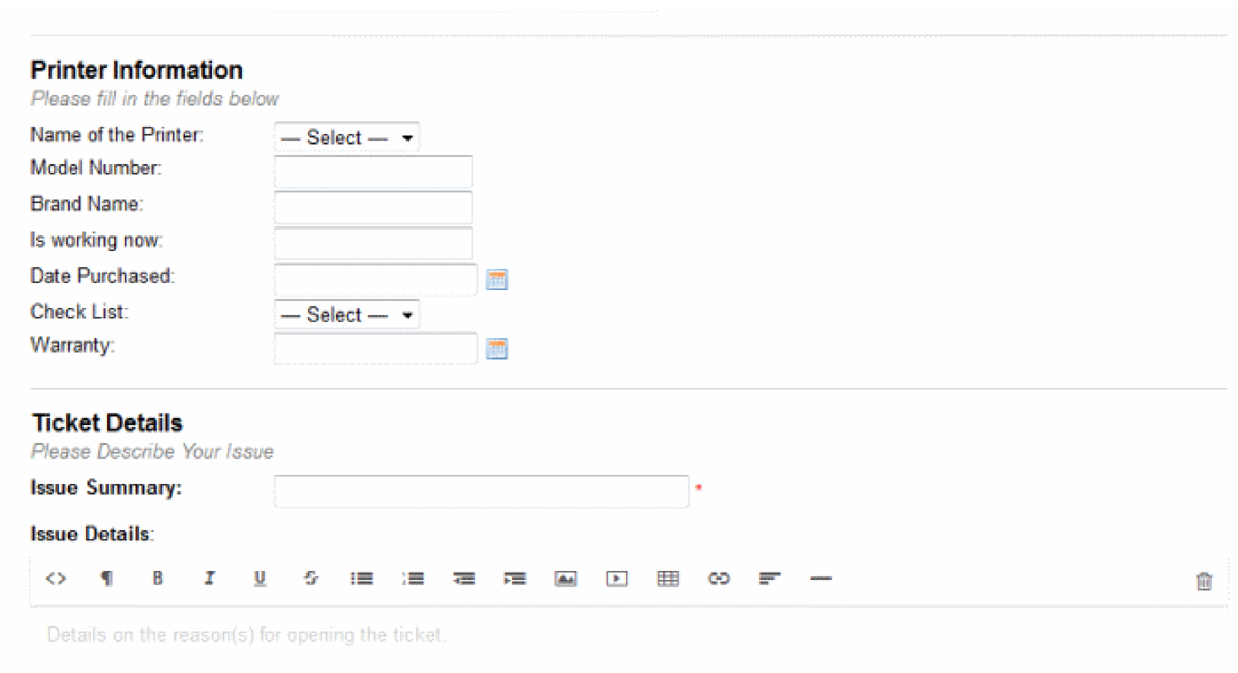
- Clicking on the 'Config' button beside a form field will display the properties screen for the selected field. This property screen depends on the type of form parameter chosen. For example, the property screen for

Date is shown below:



The property options selected for the lists will be displayed in the client portal for tickets.

- **Internal** - Select this check box if the fields should be available only for tickets that are created internally. If left unchecked, the fields will be displayed in the client portal that is used for ticket creation by the users. An example is shown below:



- **Required:** If selected, the field is marked as mandatory. The ticket cannot be saved or submitted until valid data is entered/selected for the field.
- **Variable:** Enter the variable name for the field data that can be used in email templates for sending automated messages. For example if you use the variable name 'model' for the Model Number field, then the variable %{model} can be used in email templates for fetching the values entered in this field. See '**Email Templates**' for more details.
- **Delete:** To delete a field from the form, select the check box and click the 'Save Changes' button at the bottom to remove the selected form.

To edit a custom form

- Click on the name of the form in the list.

The 'Update Custom Form Page' screen will be displayed. The update procedure is same as explained above while **adding** a new Custom Form.

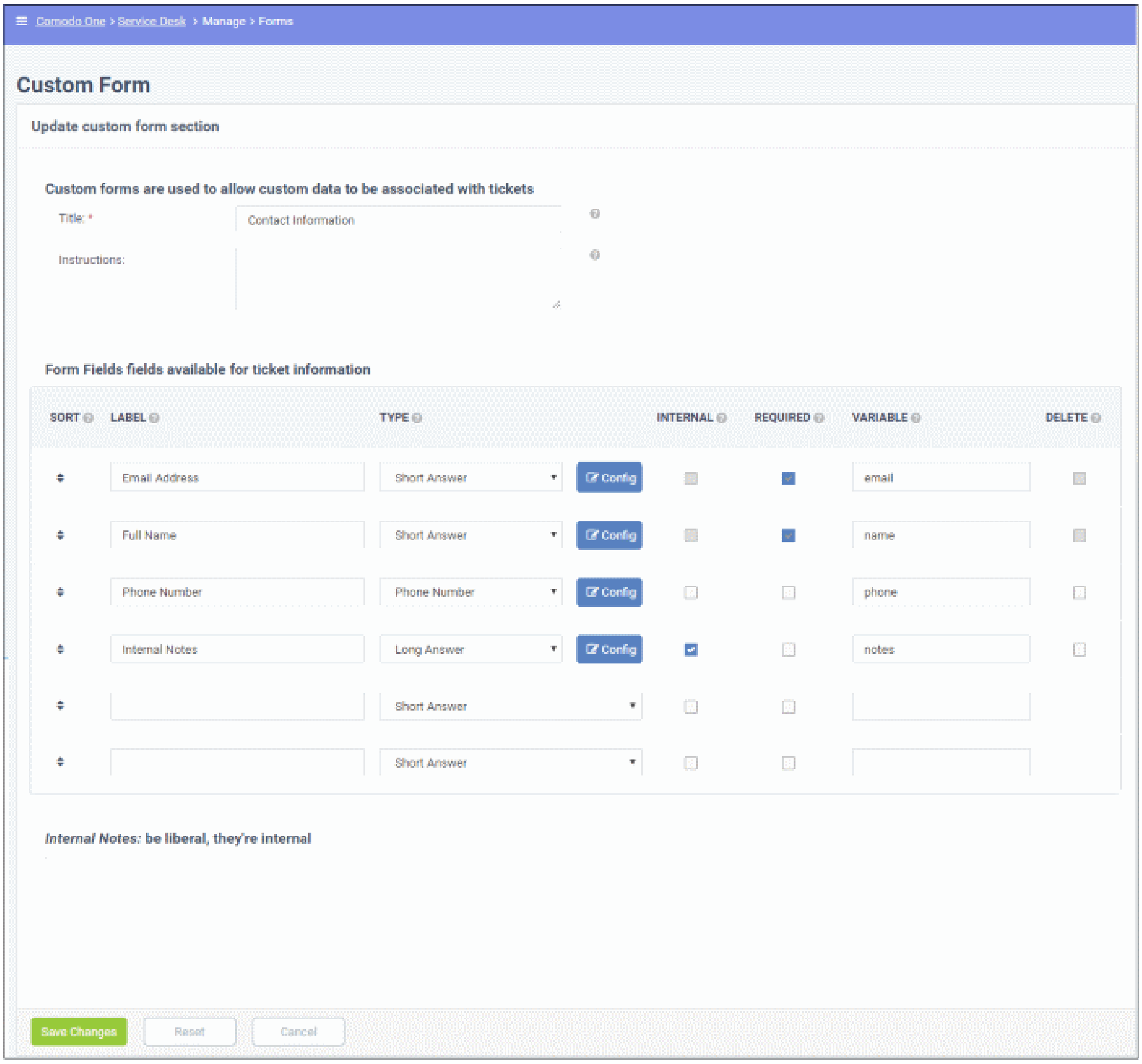
To delete a custom form

- Select the custom form that you want to delete from the list, click the 'Delete' button at the top of 'Custom Form' section in the screen and confirm the deletion in the 'Confirmation' dialog. Please note that built-in forms cannot be deleted.

To edit a built-in form

- The fields that can be edited for a built-in form depends on its type.

The Contact Information built-in form is shown below as an example:



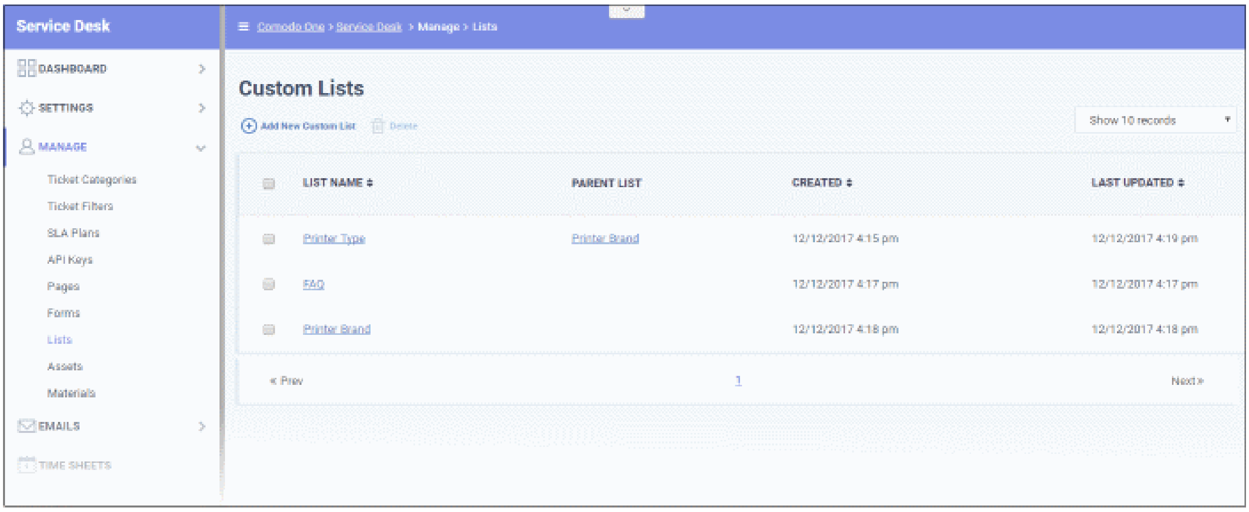
- Update the editable fields as required. This is same as editing the custom forms explained above.
- Please note the updated details will be reflected in all applicable interfaces such as ticket screens as well as in the end-user portal form. For example if you change the 'Email Address' label' to 'Email Information', this will be applied to all applicable forms.

2.3.7 Custom Lists

- The 'Custom Lists' interface lets you create and manage new drop-down menus.
- Once created, these drop-down lists can be added to built-in and custom forms which are used in various service desk interfaces. For example, they can be added to the forms used to create a new user, to add a new organization or to create a new ticket. See **Forms** for more details for built-in and custom forms.
- Custom lists can have a multi-level 'parent-child' structure. The contents of a child list can dynamically change depending on the item selected in the parent list.

To open the 'Custom Lists' interface

- Click 'Manage' on the left then 'Lists' in the Admin Panel



Column Headers

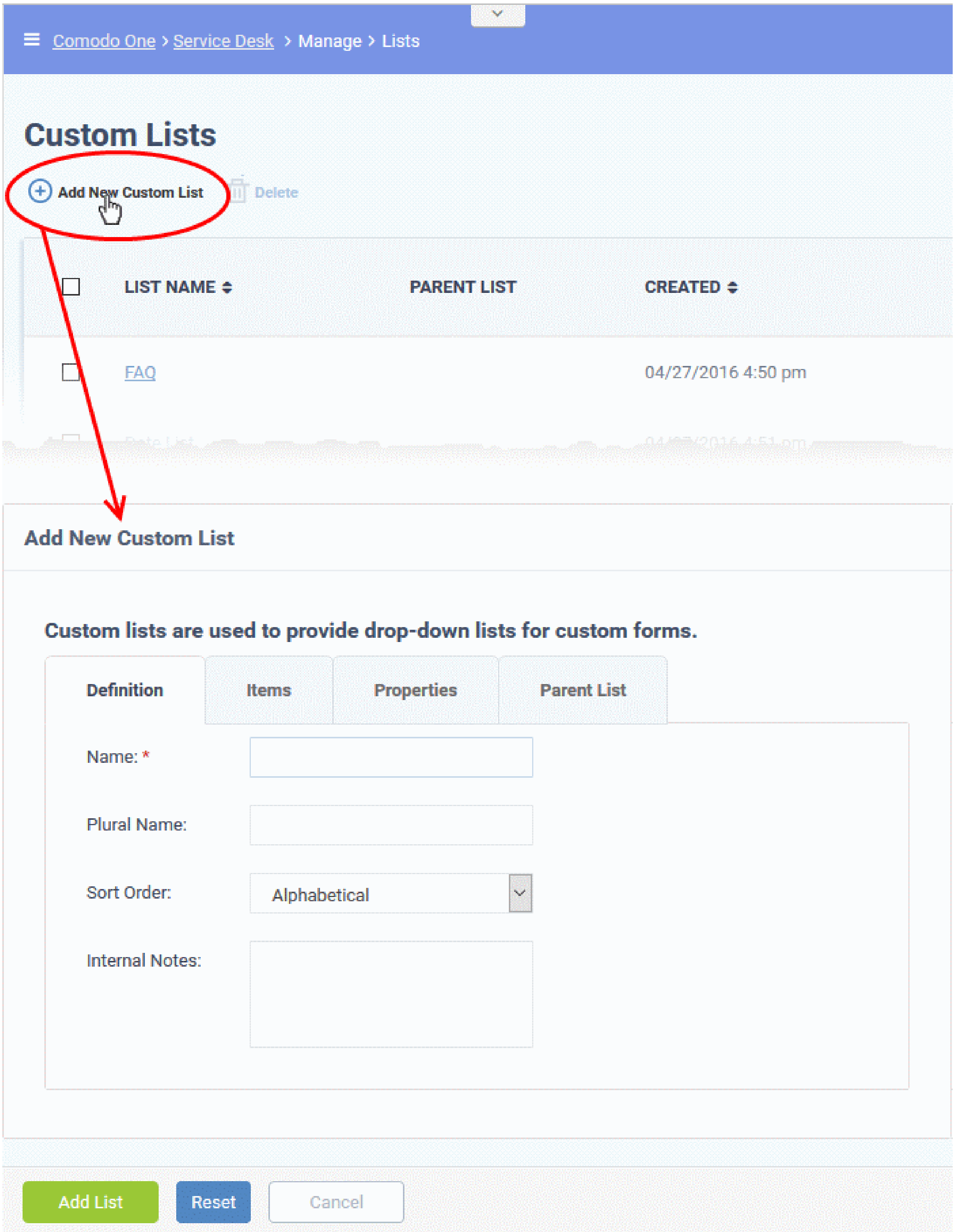
- **List Name**: List label. Choose a label which describes the type of items in the list.
- **Parent List**: If this is a child list then this column shows the name of the parent list. Please note that one parent list can have only one child list. A child list can be a parent of the next level child list.
- **Created**: Date and time on which the list was added
- **Last Updated**: Date and time the list was most recently edited.

Sorting items

- Click a column header to sort items in ascending/descending order of entries in that column.
- The 'Show records' drop-down lets you choose the number of items shown per page from 10 to 100. You can navigate to different pages by clicking 'Next' and 'Prev' at the bottom.

To add a new custom list

- Click the 'Add New Custom List' link at the top

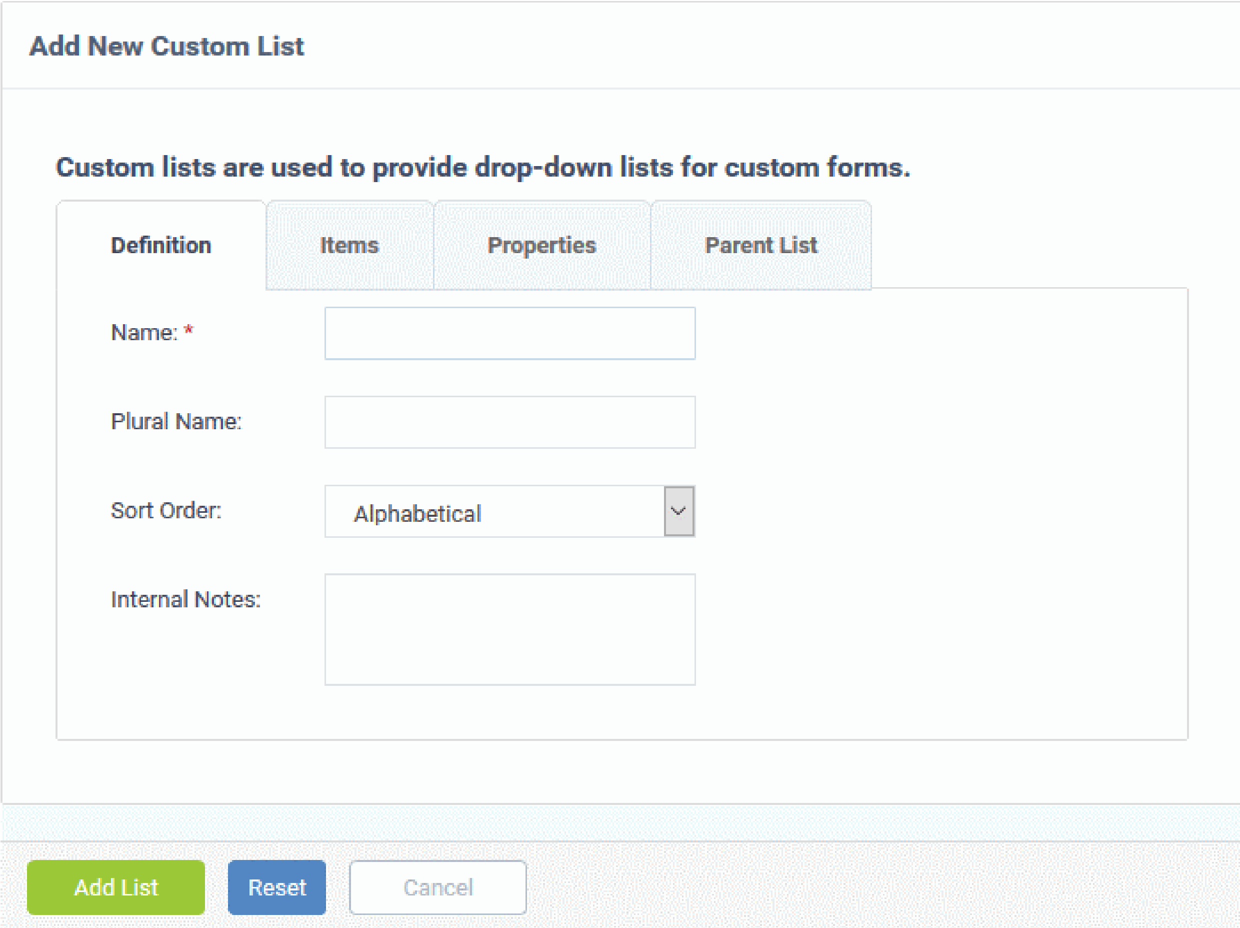


Creating a new custom list involves the following steps:

- **Step 1 - Enter a name of the custom list and define sorting order of items in the list**
- **Step 2 - Add items to the list**
- **Step 3 - Define characteristic properties for the category of items covered in the list (optional)**
- **Step 4 - Enter the values of the parameters as properties for each item in the list (optional)**
- **Step 5 - Choose Parent list and map parent items for each item in the list (optional)**

Step 1 - Enter a name of the custom list and define sorting order of items in the list

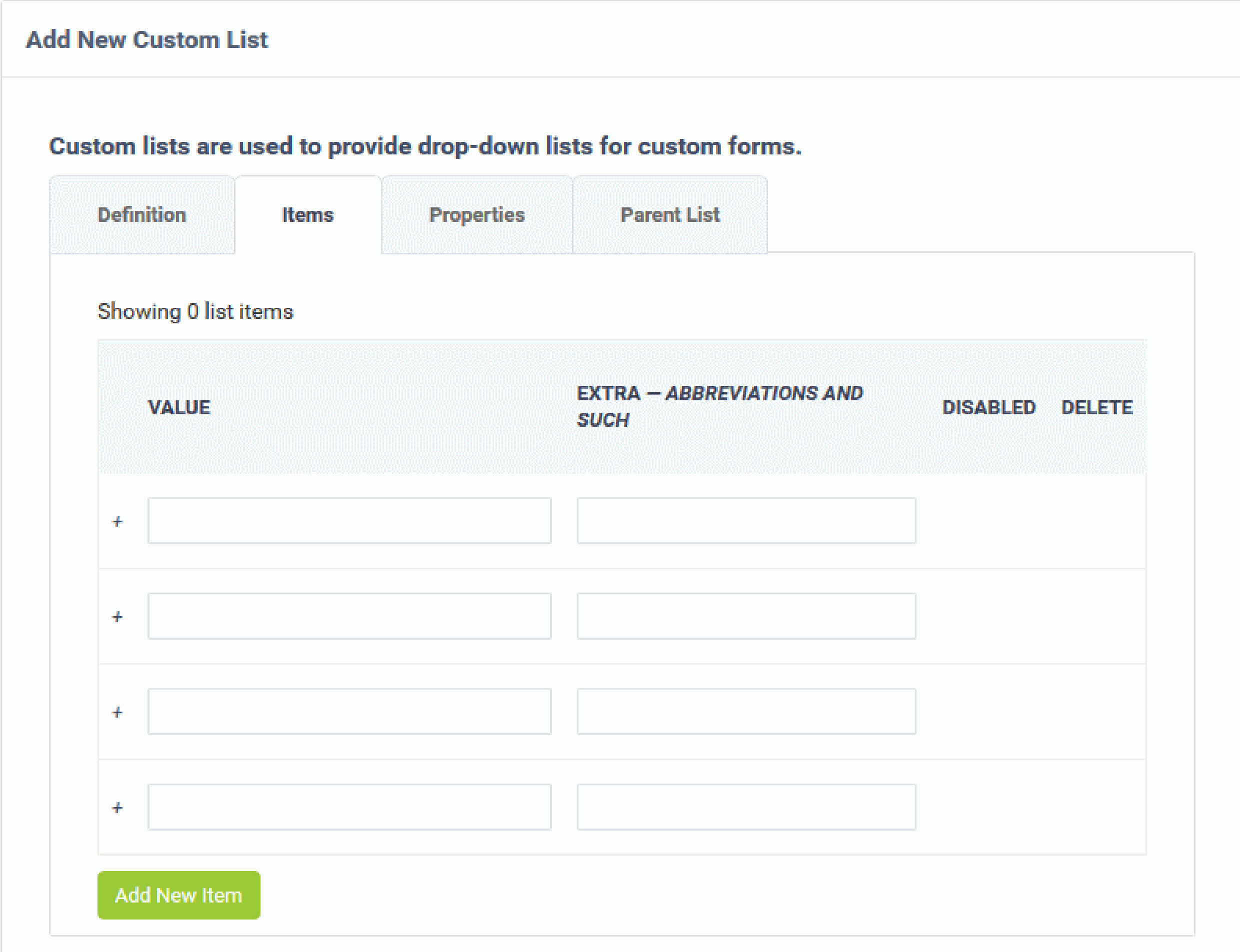
- Click the 'Definition' tab in the 'Custom List' screen.



  - **Name**: Enter a label for the custom list, indicating the category of items in the list
  - **Plural Name**: Enter the plural form of the name of the list. This will be displayed under 'Custom Lists' in the 'Type' drop-down when configuring a field in the 'Forms' interface. This is optional. If you leave this field blank, the 'Type' interface will show the 'Name' Field.
    - See the explanation of **Form Fields** in the previous section **Forms** for more details.
  - **Sort Order**: Choose how list items should be displayed (alphabetical, reverse alphabetical, or sorted manually). The options selected here will be applied to the items in the 'Items' tab.
  - **Internal Notes**: Add notes for the list that are for internal purpose only.
- Click 'Add List' to save the list

Step 2 - Add items to the list

- Click the 'Items' tab.



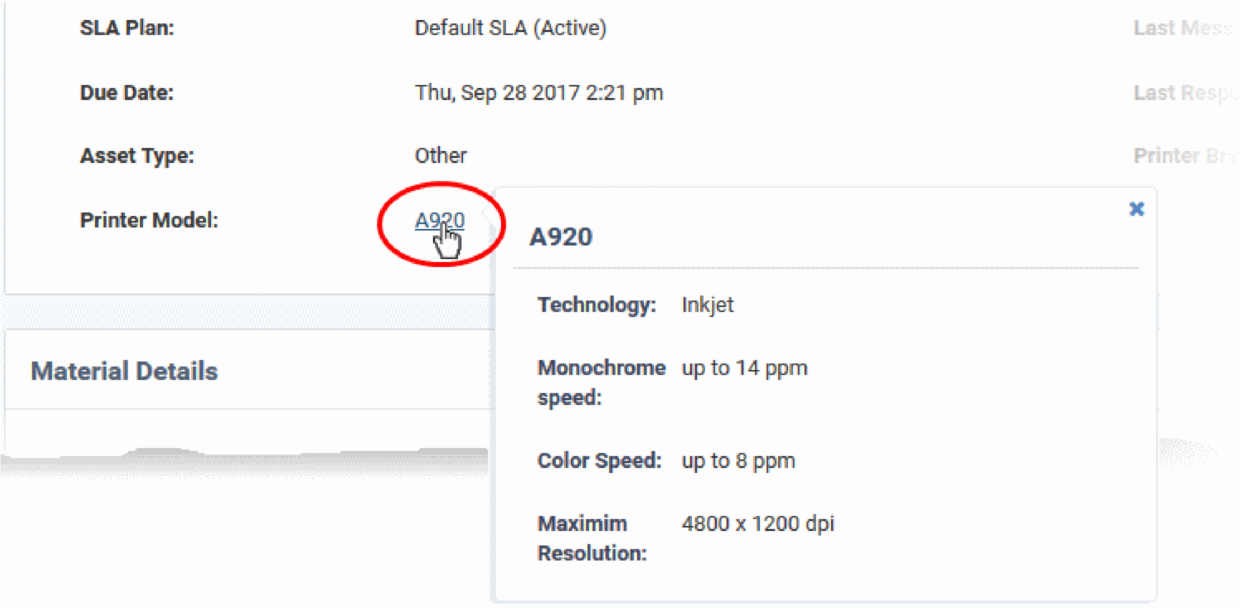
- Enter the items you want to show in the list
  - Value - Enter the name of the item
  - Extra - Abbreviations and such. Abbreviations will be included when users start typing the name.
  - Disabled - Enable or disable the item. Disabled items will not be displayed in the drop-down on the form to which the list is added.
  - Delete - Remove the item.
  - Click 'Add New Item' to add items to the list

Note: The 'Disabled' and 'Delete' check-boxes will become active after you save the list.

- Click 'Save Changes' to save the list

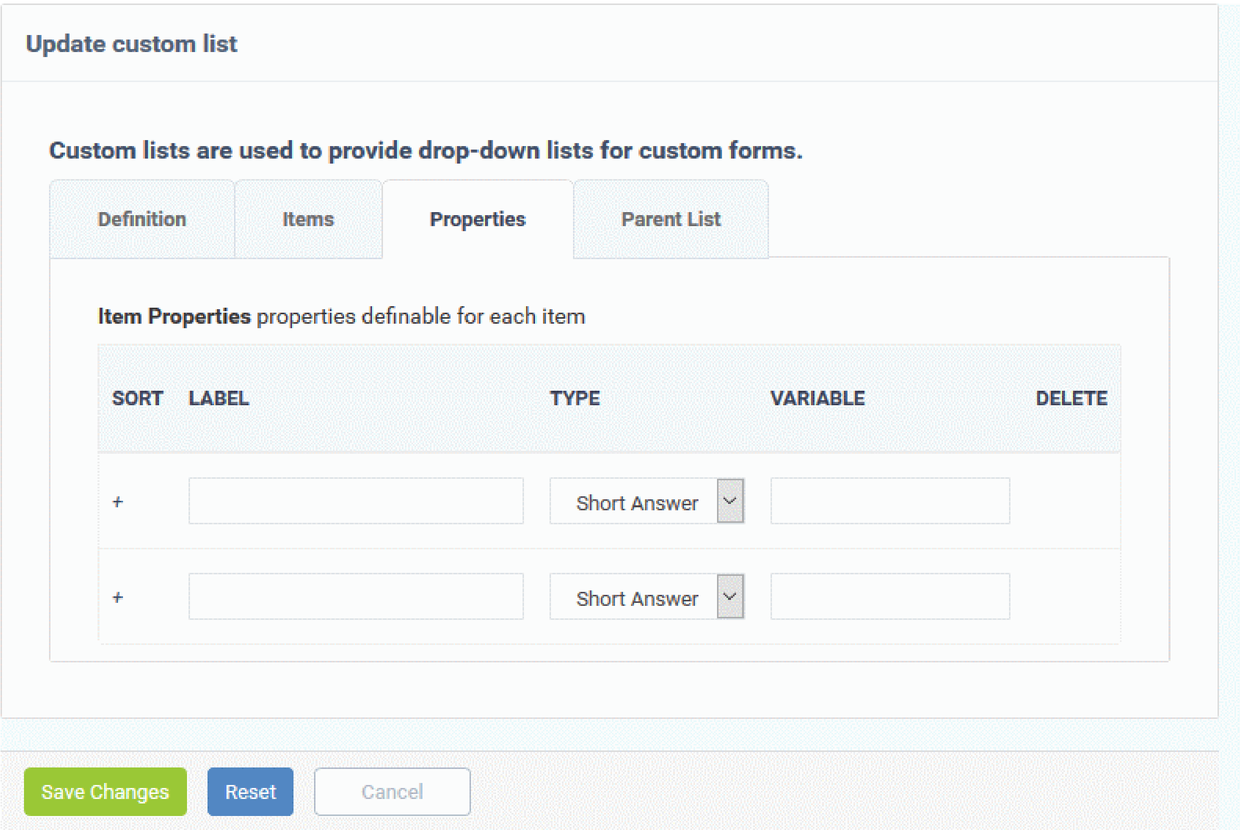
Step 3 - Define characteristic parameters as properties for the category of items covered in the list (Optional)

- The 'Properties' tab lets you define characteristics, or specs for the category of items in your list.
- For example, if your list contains various printer models, you could create properties such as 'Technology', 'Monochrome Speed', 'Color Speed', 'Maximum Resolution' etc. You can then define values for each printer model.
- After creating your properties, you should save the list. You can then go to the 'Items' tab, click the properties' link next to an item and enter its specific values. This information will be displayed as a tool-tip when a user selects the item on the target page.
- For example, if a user reports a problem and chooses their printer model when creating a ticket, the tool-tip is displayed in the 'Ticket Details' interface:

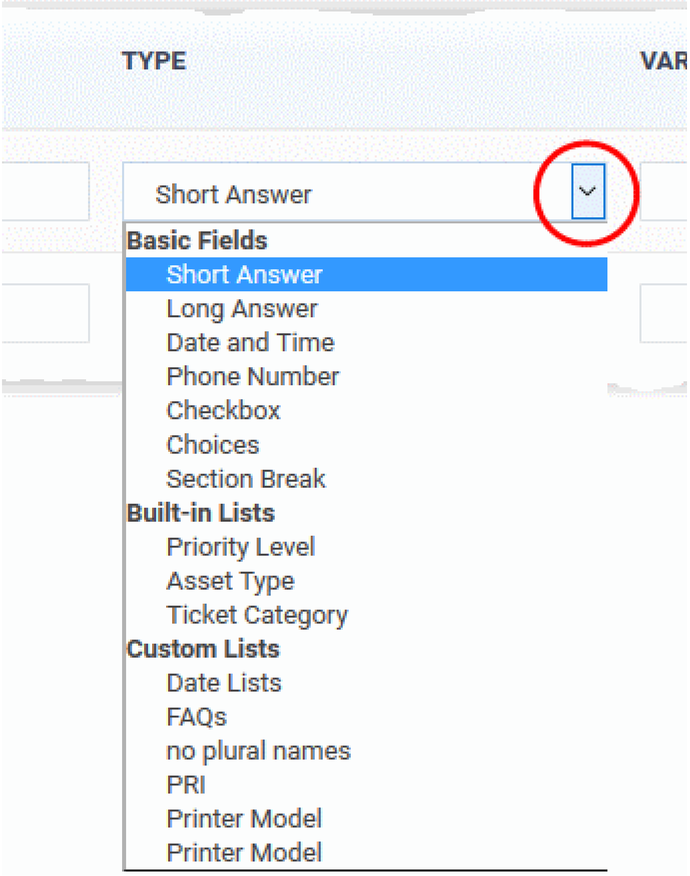


To add a list of properties

- Click the 'Properties' tab



- Enter the parameters to be added to the properties list one by one
  - Label: Enter the name of the parameter
  - Type: The parameter will appear as a field while configuring the properties for each item in the 'Items' tab. Select how the value of the parameter has to be entered, from the drop-down. See **Appendix 1 - Field Types in Custom Forms and Custom Lists** for more details on field types.

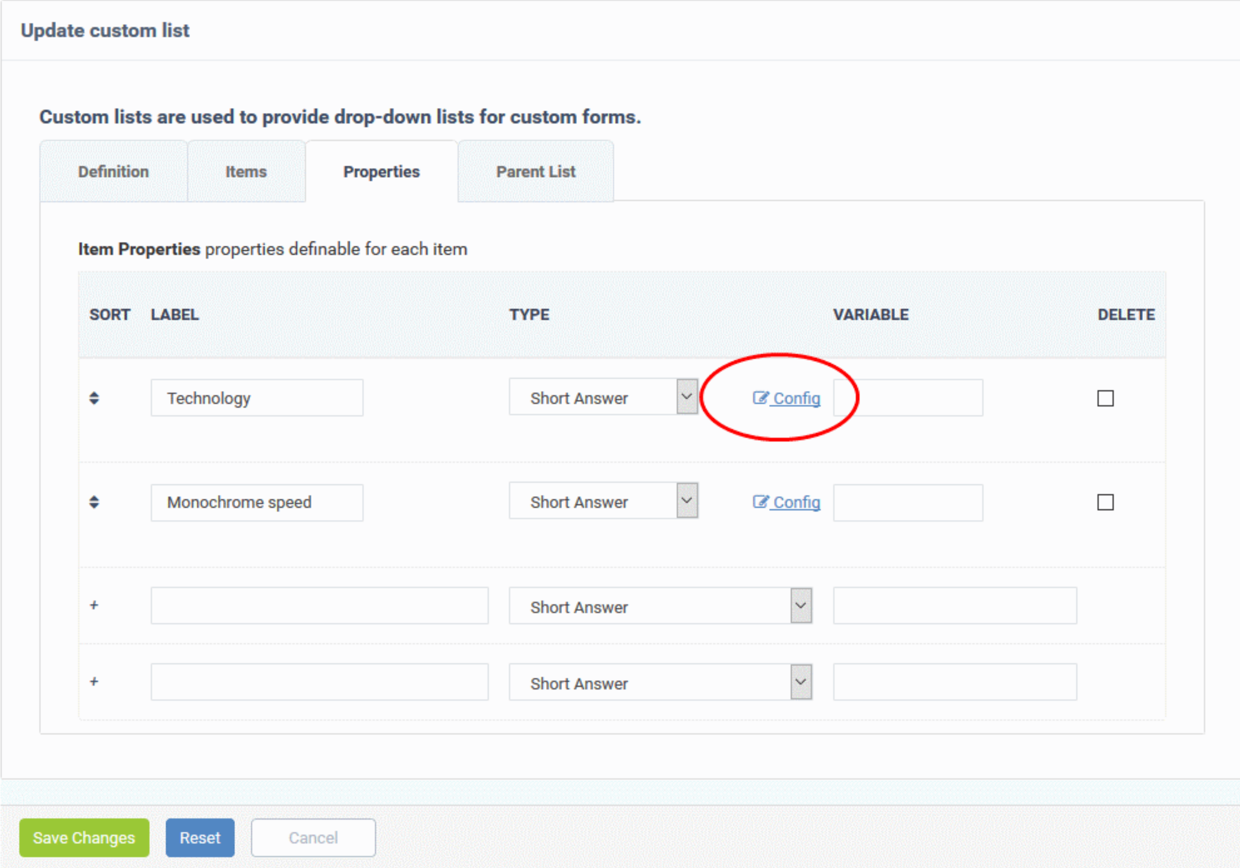


Tip: If required, you can create a custom list and select that as drop-down to be included for entering the values for the parameter for the items.

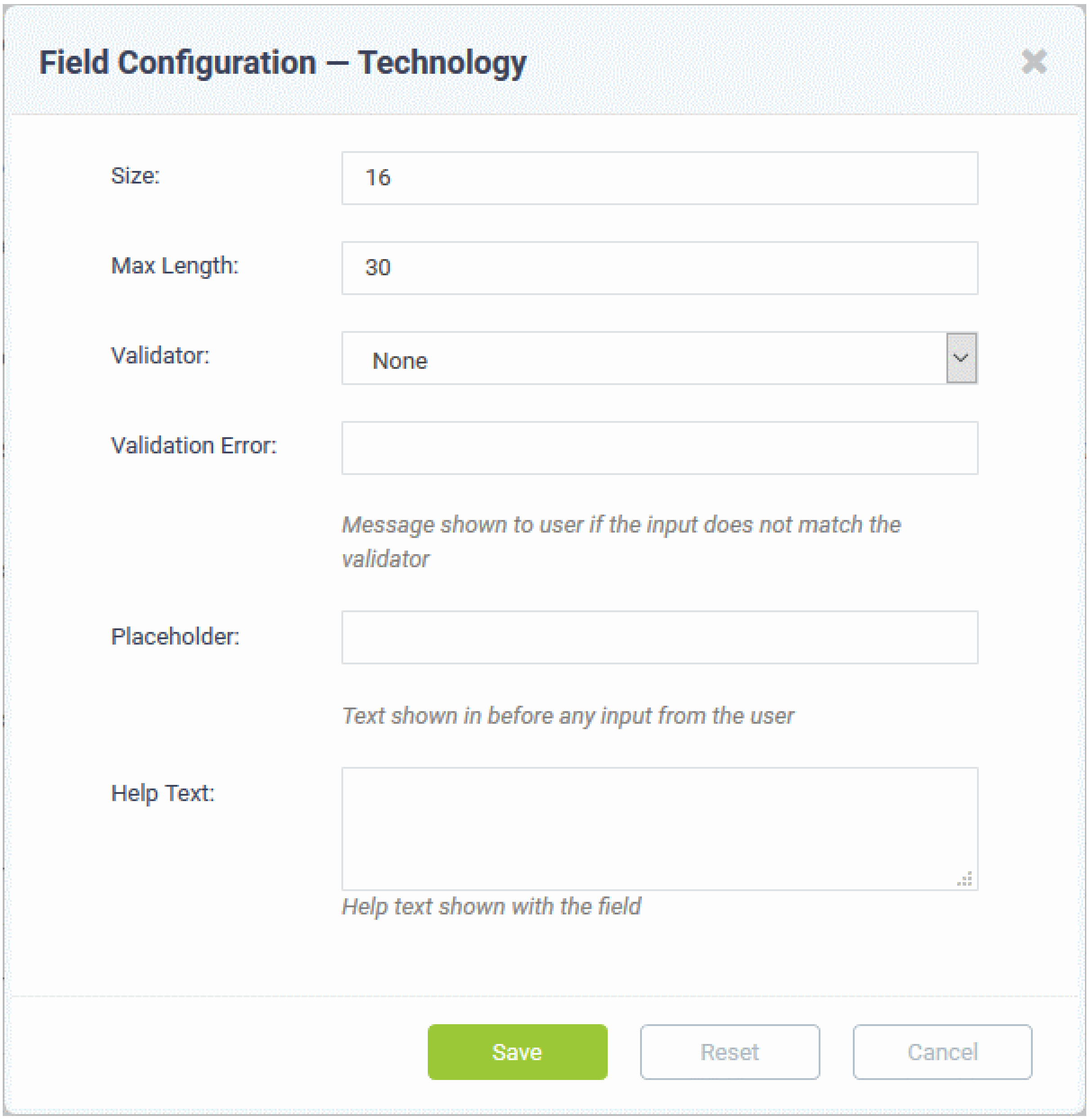
- Variable - Allows you to enter the variable name for the field data.
- Delete - Allows you to remove the parameter while editing the list.

Note: The 'Variable' and 'Delete' options will be active after you save the list.

- Click 'Save Changes' to save the list
- Reopen the 'Properties' tab after saving the list.



- Config: Click the 'Config' button in the row of a parameter to configure how the field is to be displayed for entering the values, depending on the Field Type chosen in the previous step. You can also set the limits, specify help text to be displayed under the field, lead text to be displayed inside the field and so on. The example below shows the configuration screen for the 'Short Answer' type field



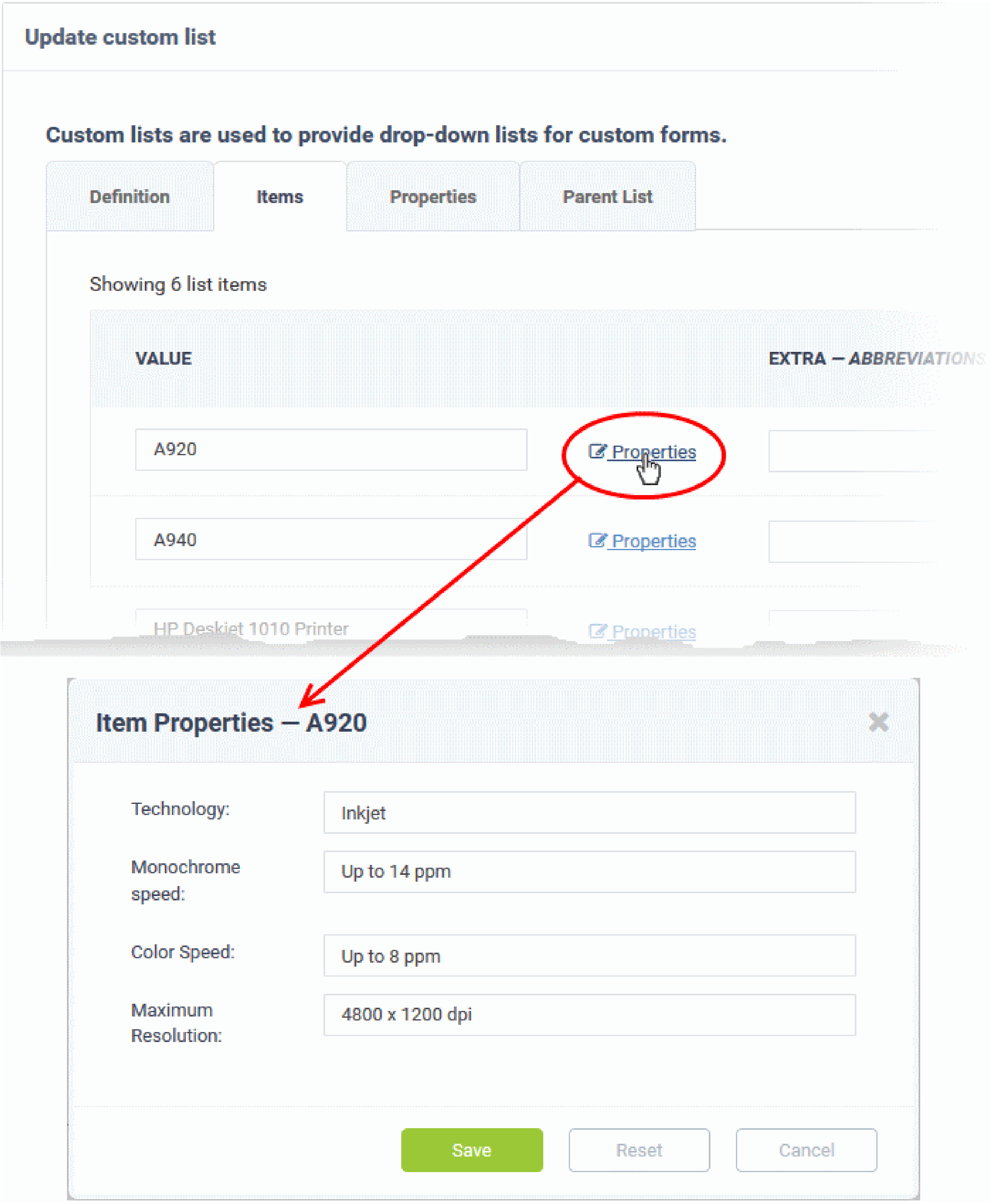
- Configure the field and click Save
- Repeat the process for configuring other fields

Tip: You can add more parameters using the new blank items appearing in the interface and repeating the process. Also you can manually sort the items to the order in which they have to appear in the 'Properties' tool tip, by dragging the icon in the Sort column to required position.

  - Variable: Enter the variable name for the field data that can be used in email templates for sending automated messages. For example if you use the variable name 'printer_tech' for the 'Technology' field, then the variable %{printer_tech} can be used in email templates for fetching the values entered in this field. See '**Email Templates**' for more details.
  - Delete: Allows you to remove a parameter from the properties list by selecting the checkbox
- Click the 'Save Changes' to save the properties list.

Step 4 - Enter the values of the parameters as properties for each item in the list (Optional)

- Click the 'Items' tab after saving the properties list
- Click the 'Properties' link in the row of the item to enter its properties



The 'Item Properties' dialog for the item will appear. The parameters configured under the 'Properties' tab in the **previous step** will appear as fields in this dialog.

- Enter the values for the parameters and click 'Save'
- Repeat the process to specify properties for all items
- Click 'Save Changes' to save the entered properties for the items

Step 5 - Choose Parent list and map parent items for each item in the list (optional)

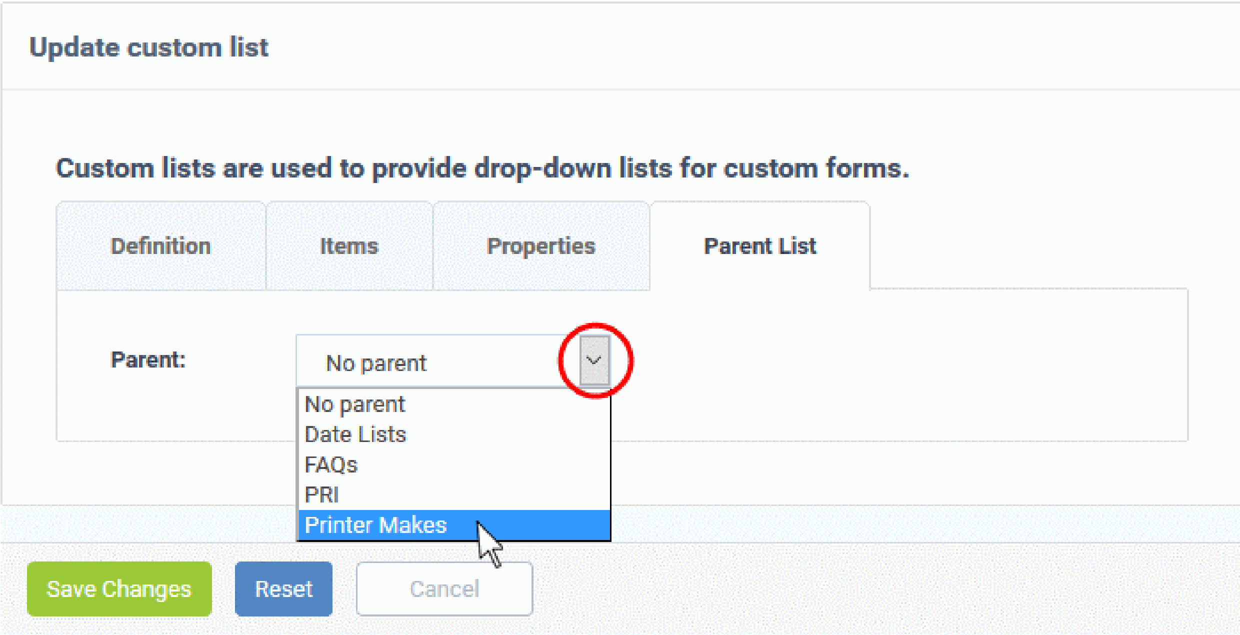
Custom lists can be constructed to have a multi-level 'parent-child' structure. When the parent and child lists are selected for successive fields in a custom form, the contents of a child list can dynamically change depending on the item selected in the parent list.

The 'Parent List' tab allows you to choose a parent list, if the currently configured list is a child list.

- Once a parent list is chosen, options for selecting the parent item for each item in the currently configured list will appear
- The parent and child lists can be added for successive fields in a custom form
- When an item is chosen from the parent field drop-down in the interface where the form is used, the successive child field drop-down will display only the child items for the chosen parent item from the child list and so on

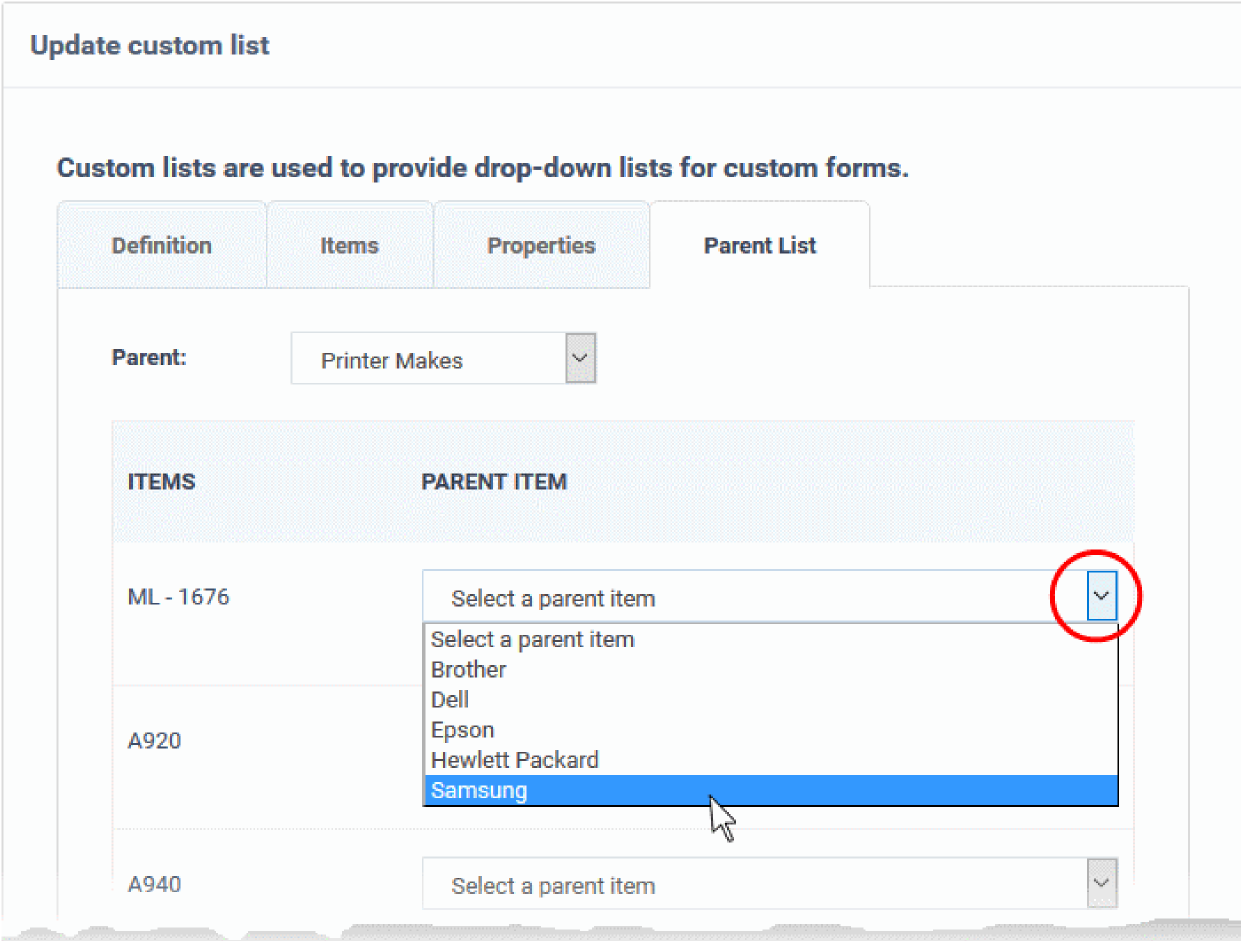
To configure patent items for currently configured list

- Click the 'Parent List' tab



- Choose the parent list for the currently configured list from the drop-down

After selecting the parent list, the list of items in the currently configured list will appear with a drop-down menu beside each (under 'Parent Item'). Each drop-down contains the list of all items included in the chosen parent list.



- Choose the respective parent item or each item in the currently configured child list one by one, from the 'Parent Item',
- Click 'Save Changes'

The custom list will be added and will be available for adding to custom field drop-downs in custom forms.

To edit a custom list

- Click the name of the custom list in the screen

The 'Update Custom List Page' screen will be displayed. The update procedure is same as explained above while adding a new Custom List.

To delete a custom list

- Select the custom list that you want to delete from the list, click the 'Delete' button and confirm the deletion in the 'Confirmation' dialog.

2.3.8 View and Manage Asset Types

- Click 'Admin Panel' > 'Manage' > 'Assets'
- An asset is an item or service added to a ticket in order to charge custom rates for specific types of work.
- For example, a 'Printer' may be one of your assets. You may want to charge a different rate for work done on printers. Add the printer asset to all tickets that involve printers.
- Only items in the 'Assets' interface will be available for selection in tickets.

Asset rates are charged as follows:

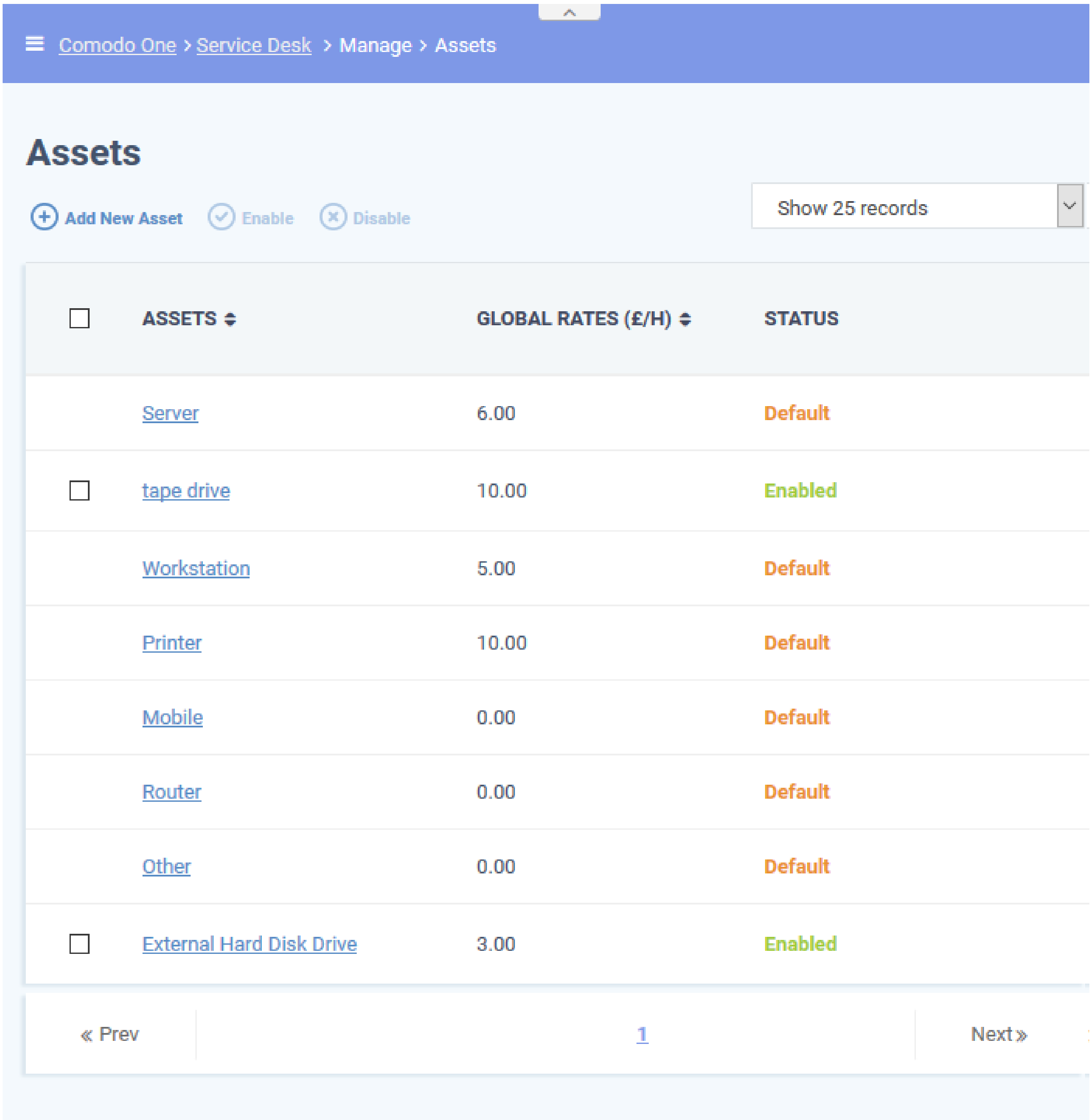
- Default charging plan - The 'global' rate for an item. This rate will be charged if:

- The organization does not have a contract
- The contract with the organization does not include a charging plan
- Custom charging plans - Assign a charging plan to a customer's contract. The charging plan can include specific hourly rates for certain assets.

See **Appendix 3 - How charging works in Service Desk** for more details on charging plans and contracts.

To view asset types and default rates

- Make sure you are in the 'Admin Panel' (see the last link on the left)
- Click 'Manage' on the left then 'Assets'



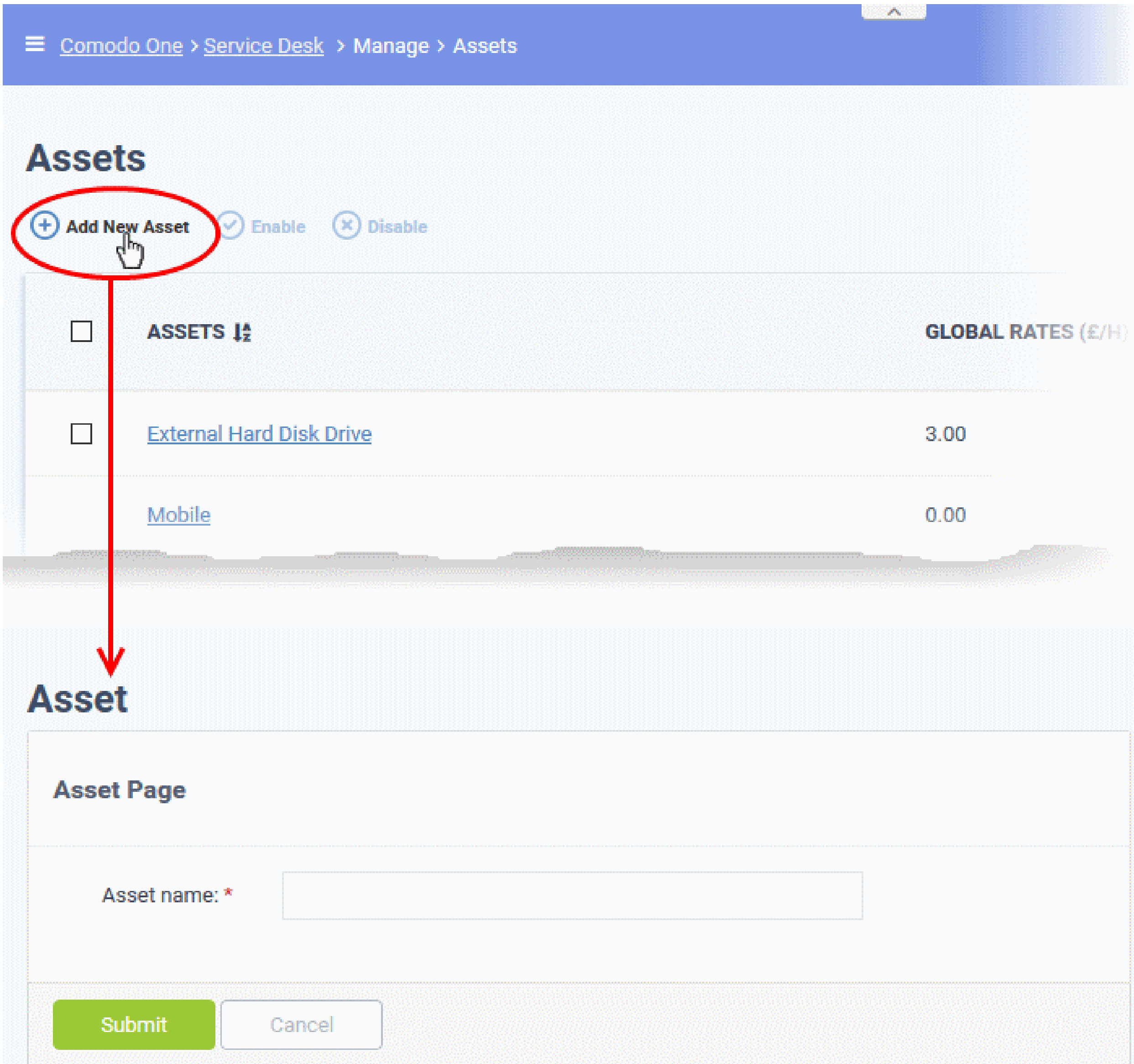
Assets - Column Descriptions	
Column Header	**Description**
Assets	The name of the asset

Global Rates	The hourly service rate for the asset type as set in the default charging plan. You can set the global rate by editing the default charging plan ('Admin Panel' > 'Manage' > 'Charging'). See **Manage Charging Plans** for more details.
Status	Whether the asset is available for selection or not. Predefined assets cannot be disabled and show as 'Default'. Custom assets can be enabled or disabled.

- Click 'Assets' or 'Global Rates' column header to sort the items in ascending/descending order of entries in that column.
- Use the 'Show records' drop-down on the top right to select the number of items to be displayed per page.

Add a new asset type

- Make sure you are in the 'Admin Panel' (see the last link on the left)
- Click 'Manage' on the left then 'Assets'
- Click 'Add New Asset' at the top

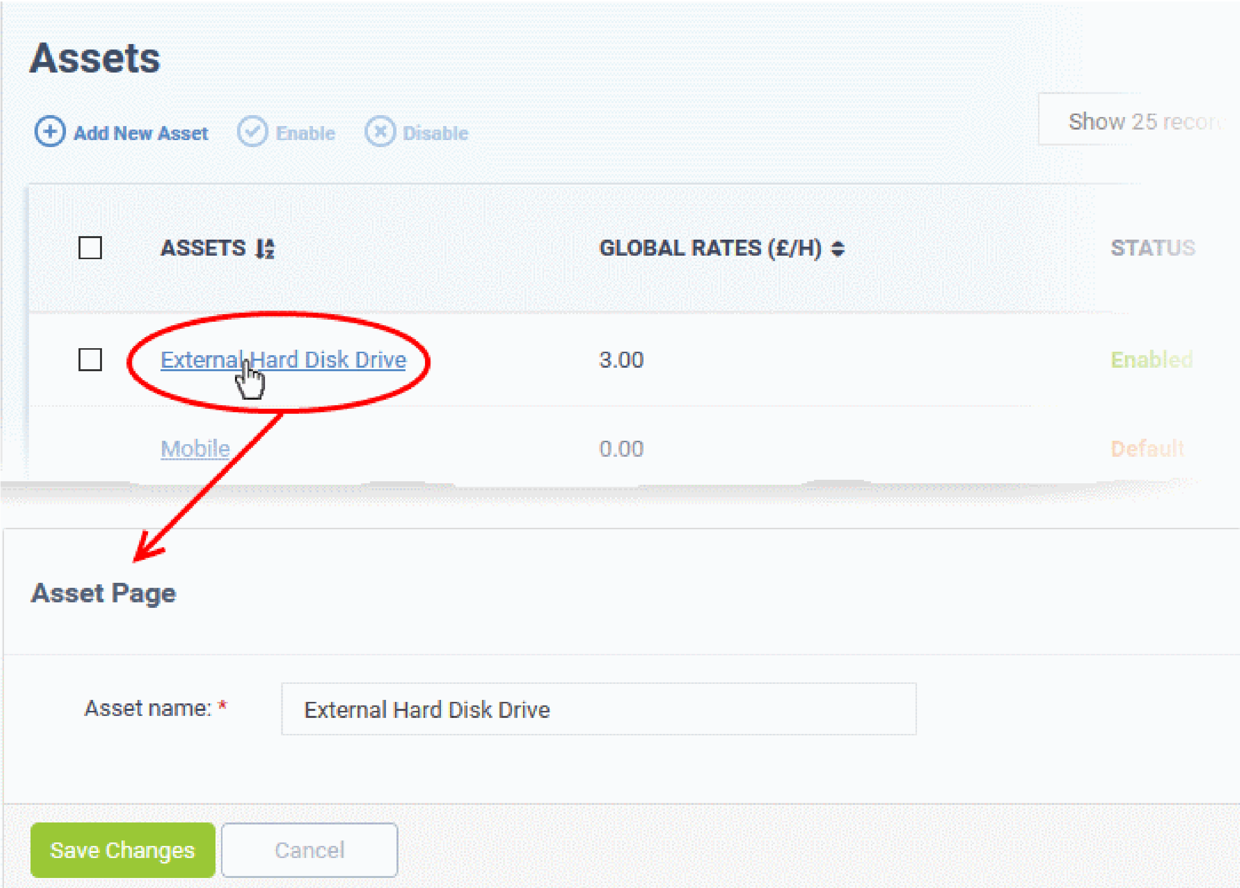


- Enter a label for the asset in the 'Asset name' box
- Click 'Submit'
- The new asset type will be added with status = 'Enabled'.

- You can set hourly rates for the asset in a charging plan ('Admin Panel' > 'Manage' > 'Charging' > 'Add New Charging').
- You can then apply the charging plan to a customer contract.

To edit an asset type

- Click on the name of the 'Asset Type'



- Edit the name of the asset, if required, in the 'Asset name' text box and click 'Save Changes'.

Note: You can edit only the name of custom added assets and not pre-configured asset types.

To enable / disable an item from the 'Assets' list

- Select an item and click 'Enable' or 'Disable' at the top. Please note you cannot disable default asset types.
- Choose 'Yes, Do it' from the confirmation dialog

Disabled asset types will not be available in the 'Asset Type' drop-down in the 'Ticket Details' interface. Tickets generated previously for this asset type will remain.

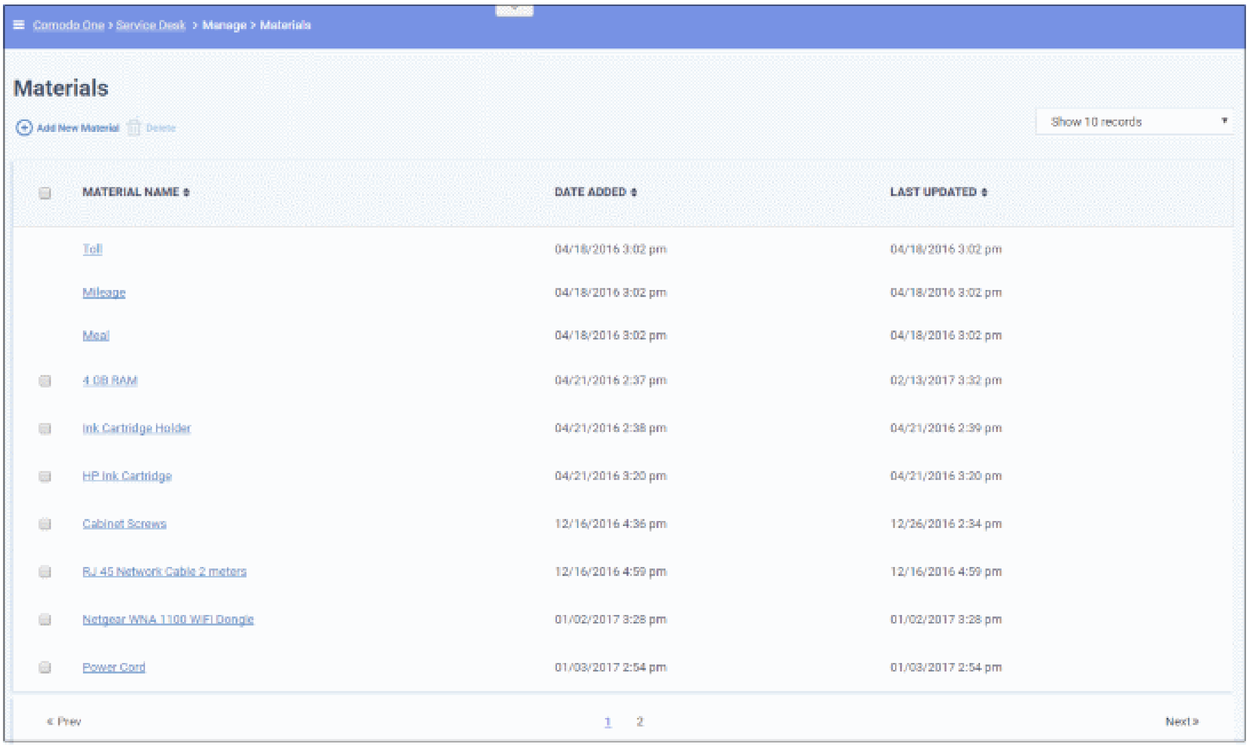
2.3.9 Manage Materials and Expense Items

The 'Materials' interface allows you to manage an inventory of materials and expense items. These items can be added to tickets by staff members who can also apply costs for each material.

Material costs and other expenses added by staff need to be approved by an administrator. After approval, the cost will be billed to the customer. See **Material Approval** for more details.

To open the 'Materials' interface

- Click 'Manage' on the left then 'Materials' in the Admin Panel

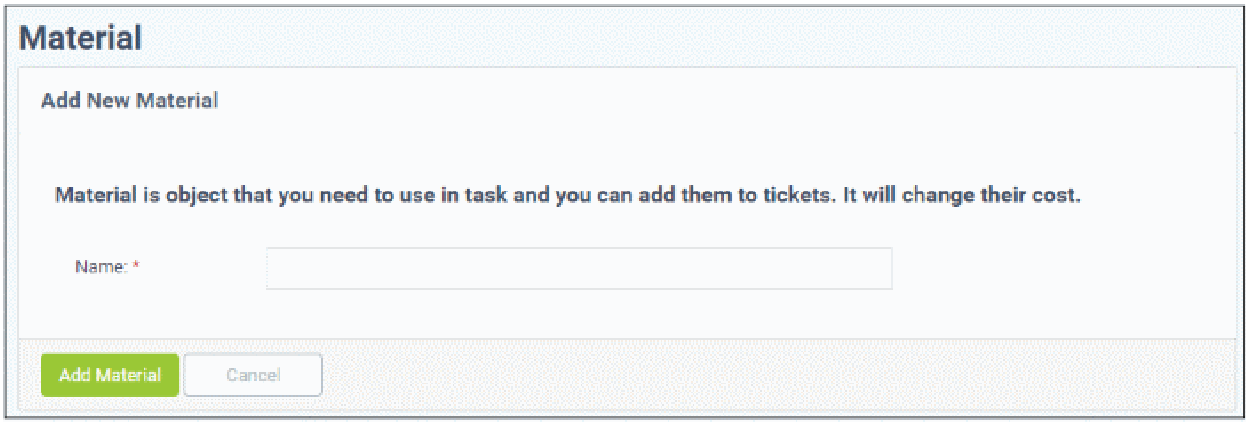


The 'Materials' interface displays a list of existing materials along with the dates they were added and last updated.

To add a new material or expense item

- Click 'Add New Material' at the top

The 'Add New Material' interface will open.

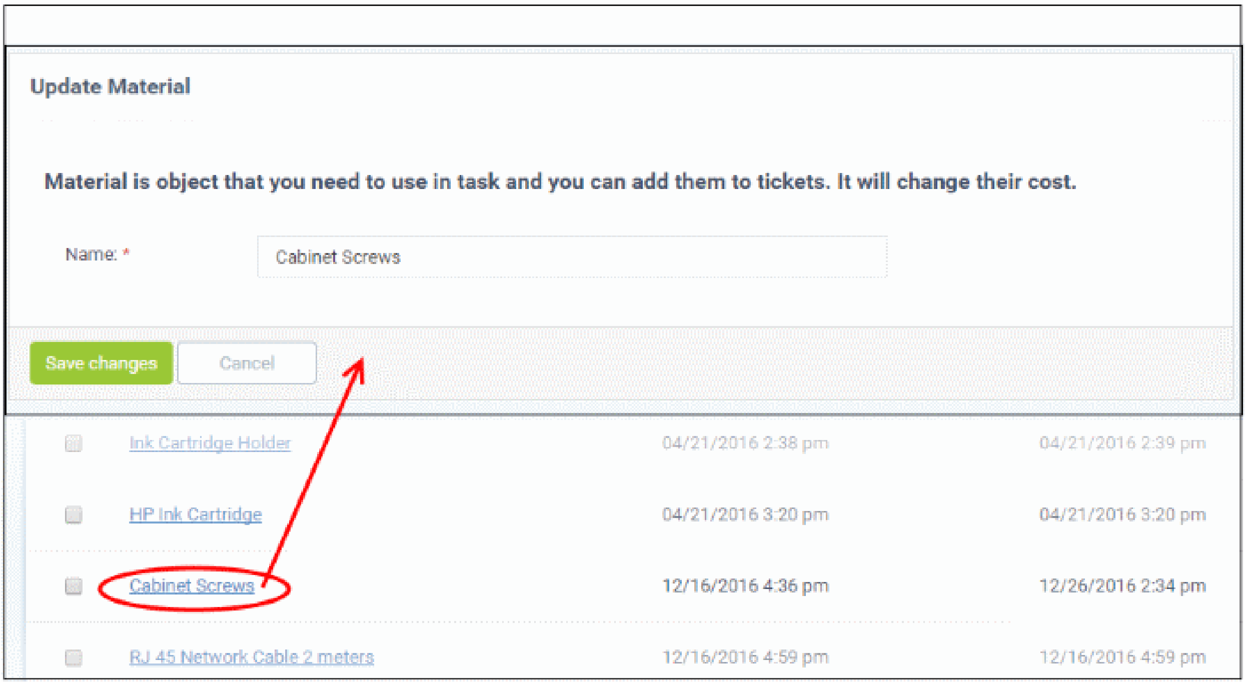


- Enter the name of the material or expense item and click 'Add Material'

The item will be added to the list and will be available for selection in the 'Add/Edit Materials' dialog in the ticket details interface. See **Adding Materials to the ticket** in the section **Ticket Details** for more details.

To update a material

- Click the name of the material



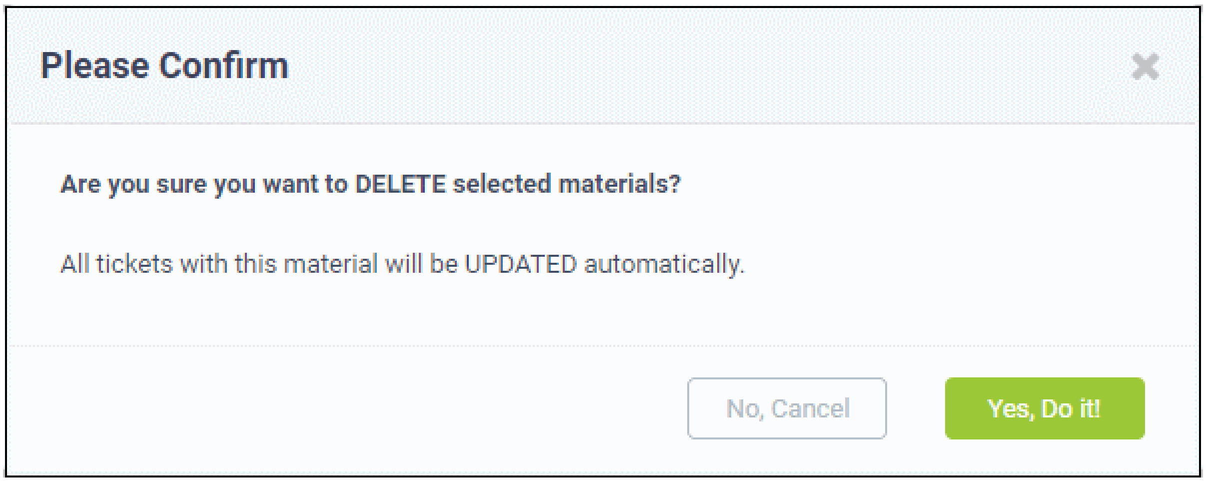
The 'Update Material' screen will be displayed.

- Update the name as required and click 'Save changes'

To remove a material or expense item

- Select the item and click 'Delete' at the top

A confirmation dialog will appear.



- Click 'Yes, Do it'

The item will be removed and will not be available for selection in the 'Add/Edit Materials' dialog in the ticket details interface.

2.3.10 Manage Charging Plans

- Click 'Admin Panel' > 'Manage' > 'Charging'
- Charging plans let you define hourly rates for work on specific assets (printers, routers, mysql etc), or work of a specific type (remote, on-site, telephone). Charging plans can be applied to customer contracts.
- Each custom charging plan allows you to define:
  1. A 'default' hourly rate which is applied to sessions not covered by a variable rate.

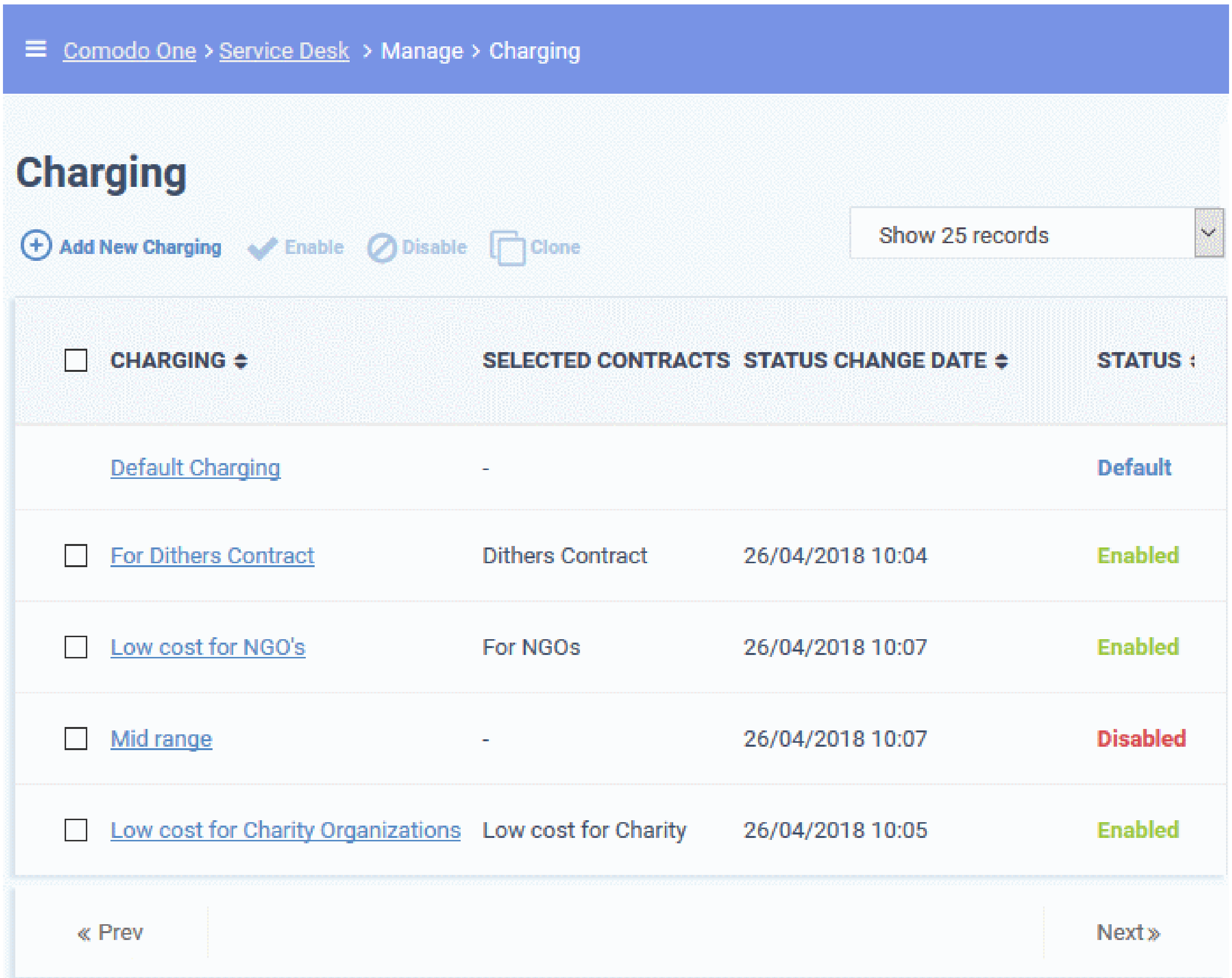
2. Variable rates for specific types of service (optional). Variable rates are defined by creating a rule with the following criteria:
    - A specific duration (e.g. 'Longer than 20 minutes', 'Greater than an hour')
    - A service type ('Telephone', 'Remote', 'On-site' or 'All'),
    - An asset (e.g. 'Printer', 'Server' or 'All')
    - An hourly rate
  - Service sessions which meet the criteria of the rule will be charged at the rate you set in the rule.
  - Sessions which do not meet the criteria of any rules will be charged at the 'default' hourly rate.
  - You can add as many rules to a charging plan as required.
- Service Desk also ships with a default charging plan which is used if you do not apply a custom plan to a customer. The default plan charges the global rates.
  - You can modify the global rates as required by configuring 'Default Charging' in 'Admin Panel' > 'Manage' > 'Charging'.
  - The global rates will be charged to the customer if:
    - The organization does not have a contract
    - The contract with the organization does not include a charging plan

Notes:

- Click 'Admin Panel' > 'Manage' > 'Charging' to create a charging plan and assign it to a contract(s).
- You can assign a plan to a contract when creating a *new* contract ('Staff Panel' > 'Contracts' > 'Add Contract')
- You cannot edit an existing contract to change/add a charging plan. You must use the 'Charging' interface to assign a plan to an existing contract.
- See **Manage Contracts** if you wish to know more about contracts.
- See **Appendix 3 - How charging works in Service Desk** for more details on calculation of charges for time spent of tickets.

To view the 'Charging' interface

- Make sure you are in the 'Admin Panel' (see the last link on the left)
- Click 'Manage' on the left then 'Charging'
- The 'Charging' interface allows you to view, enable/disable, clone and create new and edit charging plans.



The interface allows you to view, enable/disable, clone and create new charging plans.

Charging Patterns - Column Descriptions	
Column Header	**Description**
Charging	Name of the charging plan. • Click a plan name to view and edit plan details.
Selected Contracts	Contracts which are using this plan.
Status Change	Date and time at which the plan was last updated.
Status	Whether or not the plan has been activated. Options = Enabled or Disabled. • Select 'Enable after saving' to activate a plan when creating or editing a plan.

- Click any column header to sort items in ascending/descending order of entries in that column

The following sections explain more about:

- **Default charging plan**
- **Create a new custom charging plan and assign it to contract(s)**
- **Edit a charging plan**
- **Enable/Disable a charging Plan**

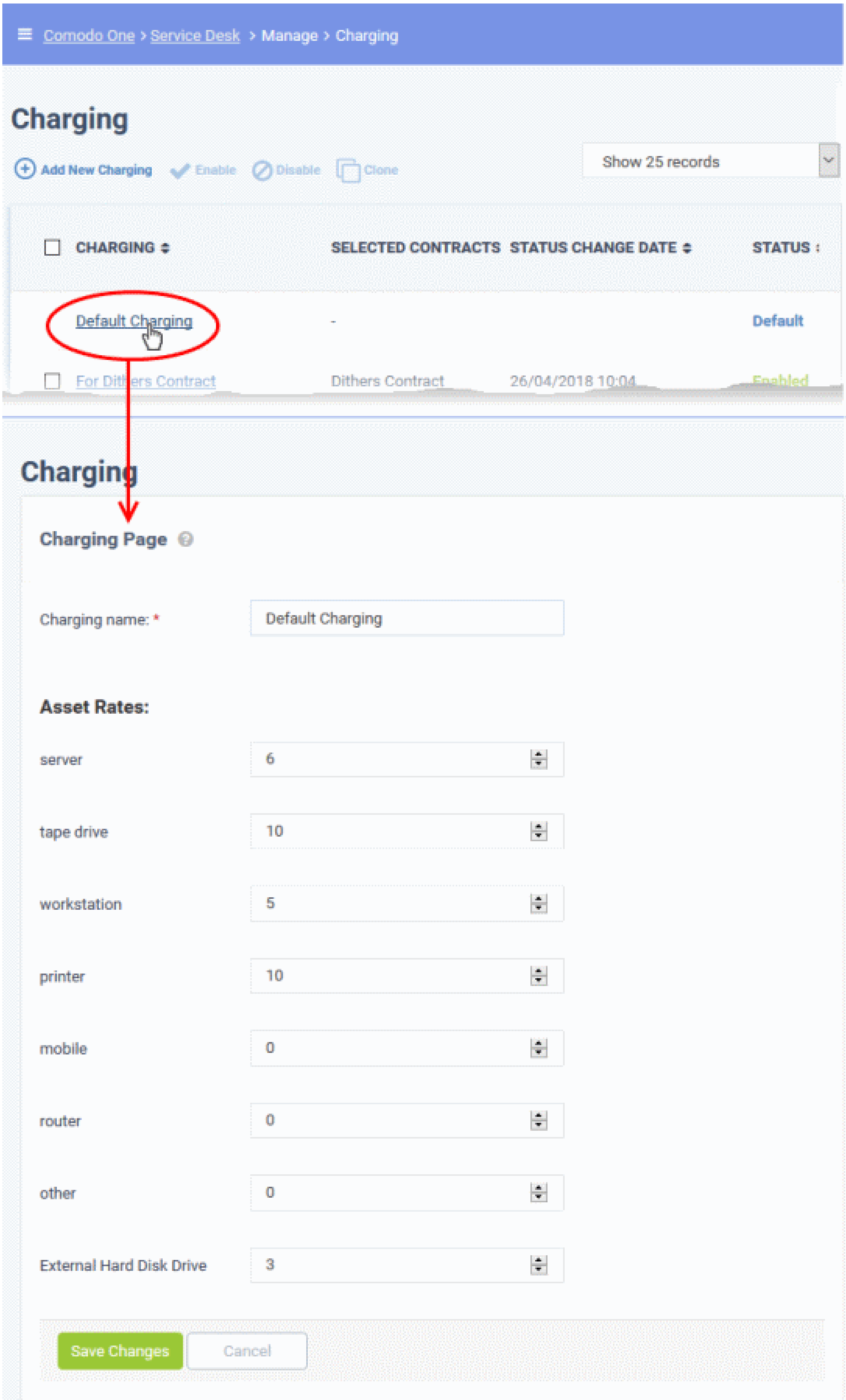
Default Charging Plan

The 'Default Charging Plan' defines global charging rates for different asset types.

- You can edit the default charging plan to set/change the global asset rates at anytime
- The charges set here will be displayed as global asset rates in the 'Manage' > 'Assets' interface
- Asset types can be added only through the 'Manage' > 'Assets' interface. If a default rate is to be assigned to a new item, first add it in the 'Manage' > 'Assets' interface the define a rate for it in the default charging plan. See **View and Manage Asset Types** for guidance on adding new items.
- You cannot assign the default charging plan to any contract
- The global rates will be applied to customers without service contract or if the service contract of the customer does not include a charging plan

To edit the default charging plan

- Make sure you are in the 'Admin Panel' (see the last link on the left)
- Click 'Manage' on the left then 'Charging'
- Click 'Default Charging' from the list of charging plans



- Charging Name - The label of the default charging plan. You cannot edit the label.
- Asset Rates - The list of assets added to the 'Manage' > 'Assets interface.

  - Set the global hourly charging rate for each asset type in respective combo box. The rate should be defined in the default currency set for your SD account in the 'Admin Panel' > 'Settings' > 'System' interface. See **C1 Service Desk System Settings** for more details.
- Click 'Save Changes'

The global asset rates will be saved.

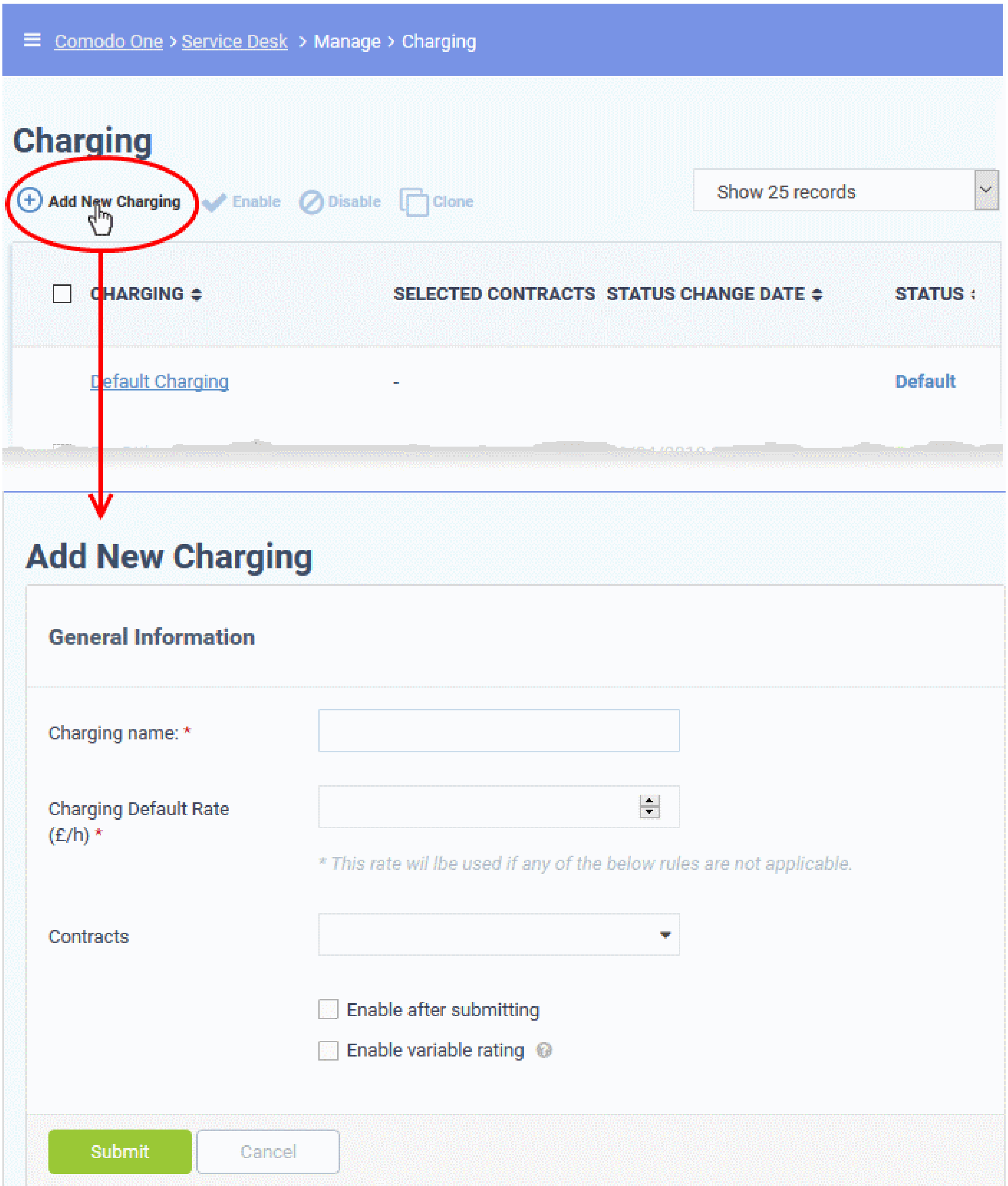
Create a New Custom Charging Plan and Assign it to Contract(s)

New charging plans can be added in two ways:

- **Manually create a charging plan**
- **Clone an existing charging plan to create a new plan**

Manually create a charging plan

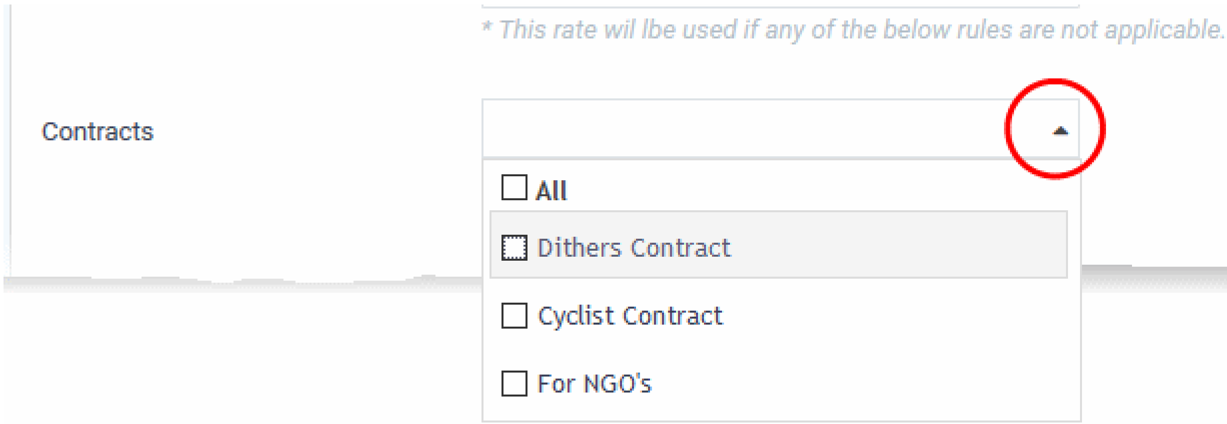
- Open the 'Admin Panel' (see last link on the left)
- Click 'Manage' then 'Charging'
- Click 'Add New Charging' at the top of the 'Charging' interface:



Complete the form as follows:

General Information

- **Charging Name** - Create a short label for the plan. The plan name will appear in the details page of all contracts to which it is applied.
- **Charging Default Rate** - The 'regular' per-hour rate that you will charge under this plan. The default rate is applied to all sessions that are not covered by any 'variable' rates that you create.
- **Contracts** - Select the customer contract(s) to which the charging plan should apply.
  - A contract is applied to a specific customer. Click 'Management' > 'Customer' in the C1 interface if you have not yet defined any customers.
  - Click 'Staff Panel' > 'Contracts' to create and manage contracts. See **Manage Contracts** if you need help with this.



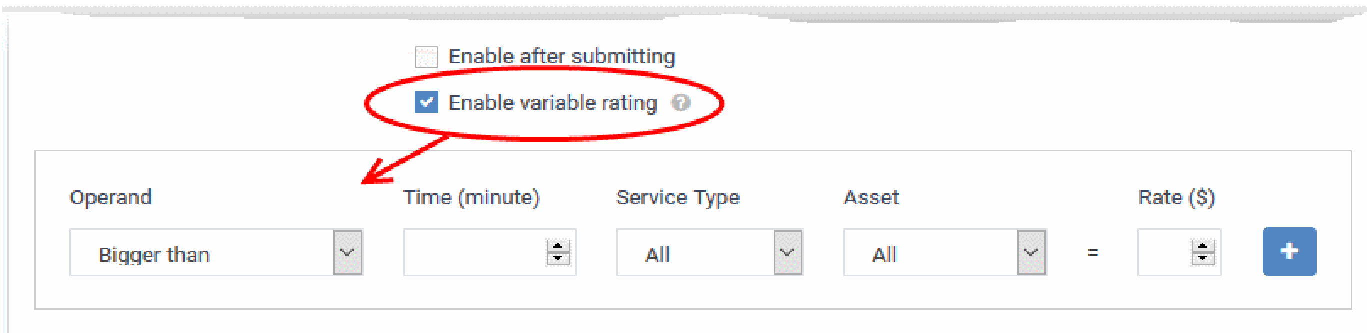
- **Enable after submitting** - The charging plan will become active immediately after saving. By enabling a plan, you activate it for all contracts that you have specified. Leave this deselected if you want to enable the plan at a later time. See '**Enable/Disable a Charging Plan**' for more details.
- **Enable variable rating** - Create custom hourly rates for specific types of service. For example, you might want to charge a different rate for on-site visits, or for work on a particular type of asset.
  - Variable rates are defined by creating a rule with specific conditions. If the conditions are met then the variable rate kicks in.
  - You can add multiple rules to a charging plan.
  - The 'default' rate is applied to sessions which do not meet the criteria of any rules.

Once saved and enabled:

- You can return to 'Admin Panel' > 'Manage' > 'Charging' to edit the plan if required.
- You can assign a plan to a contract when creating a *new* contract ('Staff Panel' > 'Contracts' > 'Add Contract')
- You cannot edit an existing contract to change/add a charging plan. You must use the 'Charging' interface to assign a plan to an existing contract.

To create a variable rate rule

- Select 'Enable variable rating'



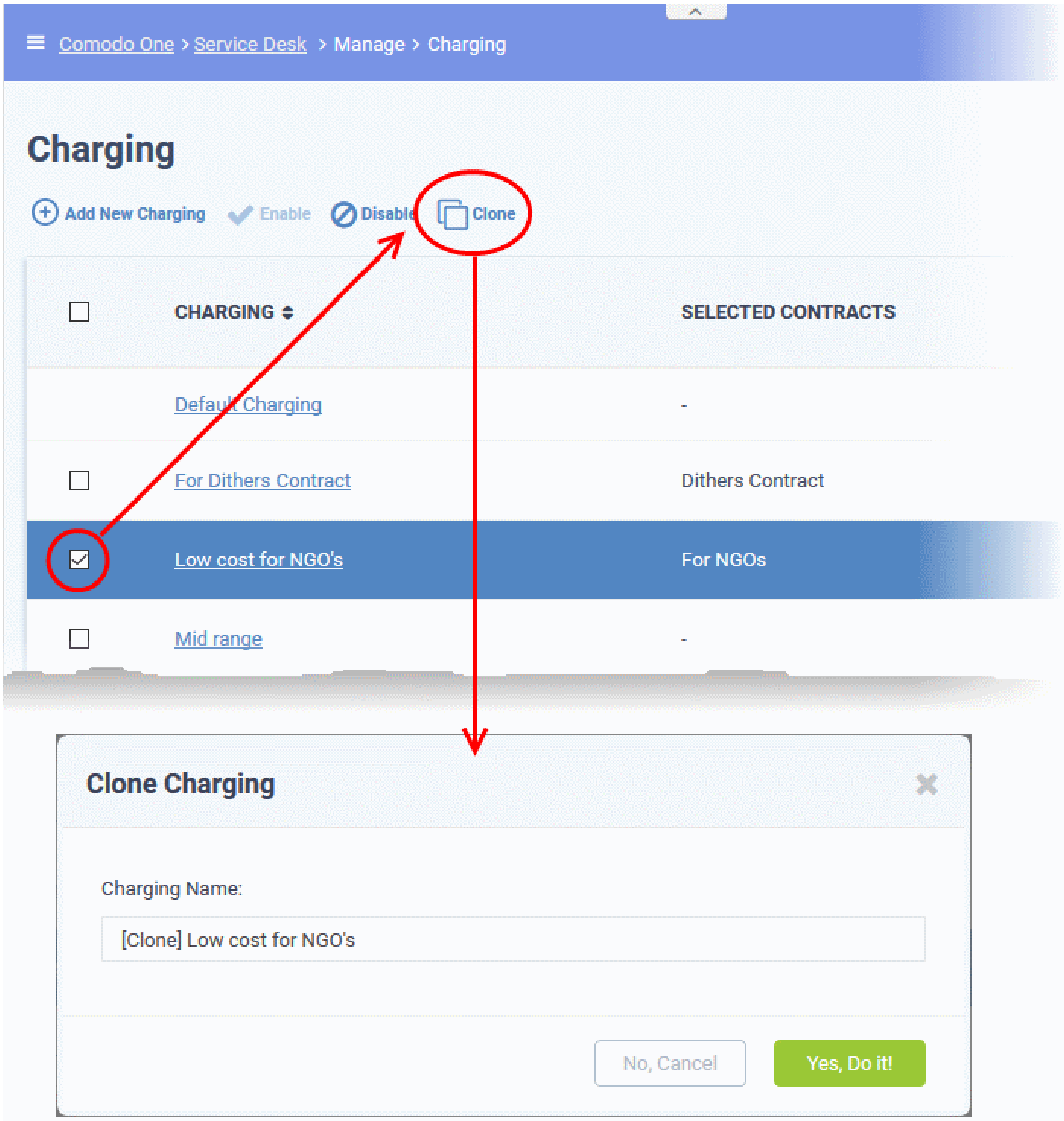
The options for creating a rule are as follows:

- Operand and Time - The condition for the duration of the service session. Select the relationship operator from the operand drop-down and enter the duration (in minutes) in the 'Time' combo box. For example, you can set the duration as 'Bigger than 120 minutes, Smaller than 60 minutes' and so on.
- Service Type - Choose the service type offered during the session. The available options are:
  - Remote
  - Telephone
  - On-site

- All (work of any type will be covered by the rule)
- Asset - The type of item that is worked on. The drop-down contains the default assets and custom assets added to your Service Desk account.
- Rate - Specify the per-hour rate to be charged if the above conditions are met.
- Click the '+' button to add more rules
- Click 'Save Changes' to save the plan. If enabled, it will be automatically applied to any contracts that you specified.

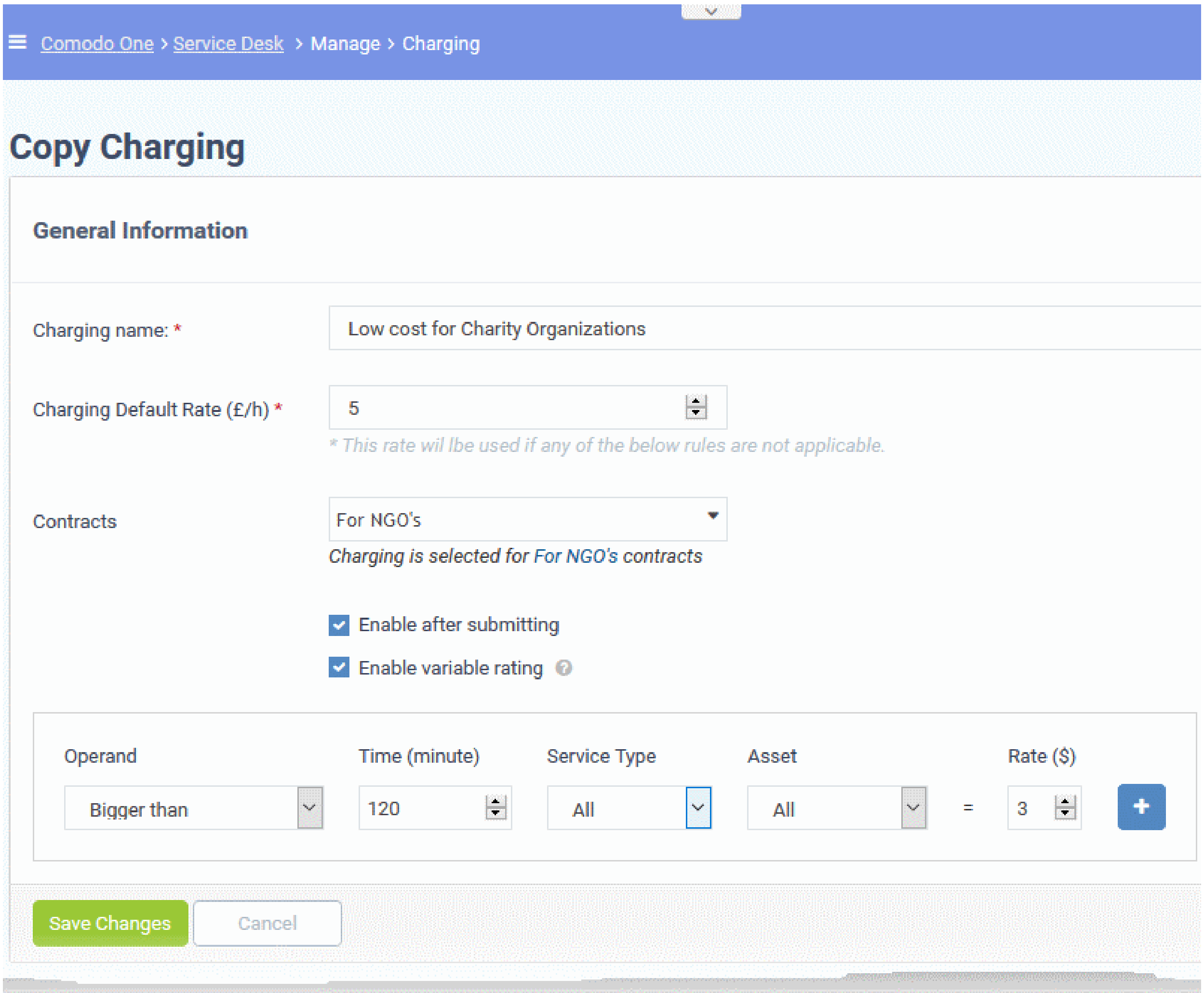
Clone an existing charging plan to create a new plan

- Open the 'Admin Panel' (see last link on the left)
- Click 'Manage' then 'Charging'
- Select a charging plan which you want to use as a template and click 'Clone'



- Enter a name for the new charging plan and click 'Yes, Do it!'

The 'Copy Charging' interface will open with values from the original plan. You can edit these as required for your new plan.

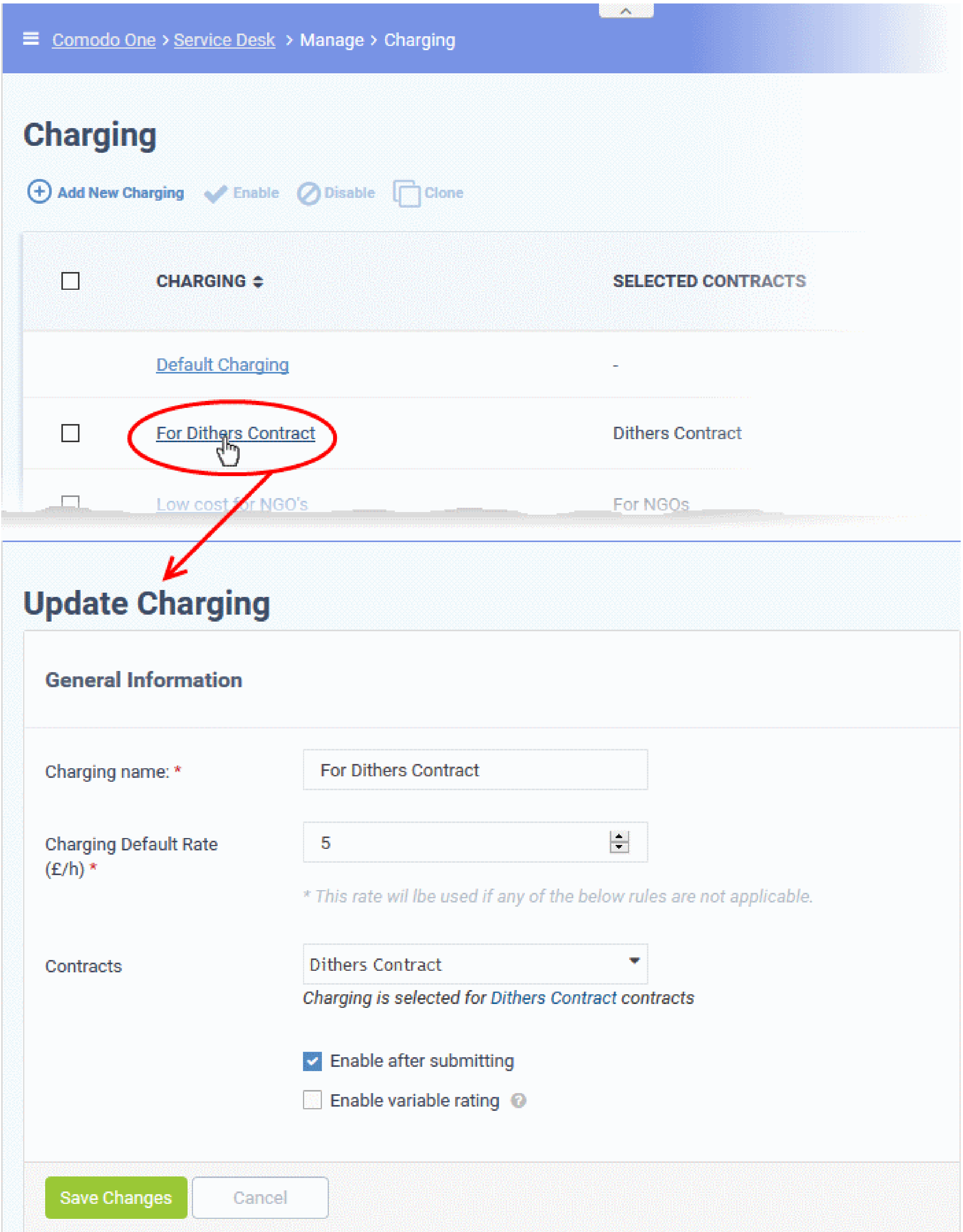


- Edit the default and variable rates as required. See **Manually create a charging plan** for more details on the options in this interface.
- The 'Contracts' field shows the contracts to which the source charging plan is applied. Modify the contracts to which new plan will apply as required.
- Variable rating. Configure any variable pricing you wish to implement on your new plan. See **Manually create a charging plan** and **Manage Charging Plans** for more advice on variable plans.
- Click 'Save Changes' to add the plan.

Edit a Charging Plan

You can edit a custom charging plan to change the default plan rate, variable hourly rates for assets and the contract(s) to which it is associated.

- Open the 'Admin Panel' (see last link on the left)
- Click 'Manage' then 'Charging'
- Click the name of the charging plan you want to edit



- Edit the default and variable rates as required. See **Manually create a charging plan** for more details on the options in this interface.
- The 'Contracts' field shows the contract(s) to which the charging plan is currently applied. Modify the contracts to which the plan will apply as required.
- Variable rating. Configure any variable pricing you wish to implement on your new plan. See **Manually create a charging plan** and **Manage Charging Plans** for more advice on variable plans.
- Click 'Save Changes' to save the plan.

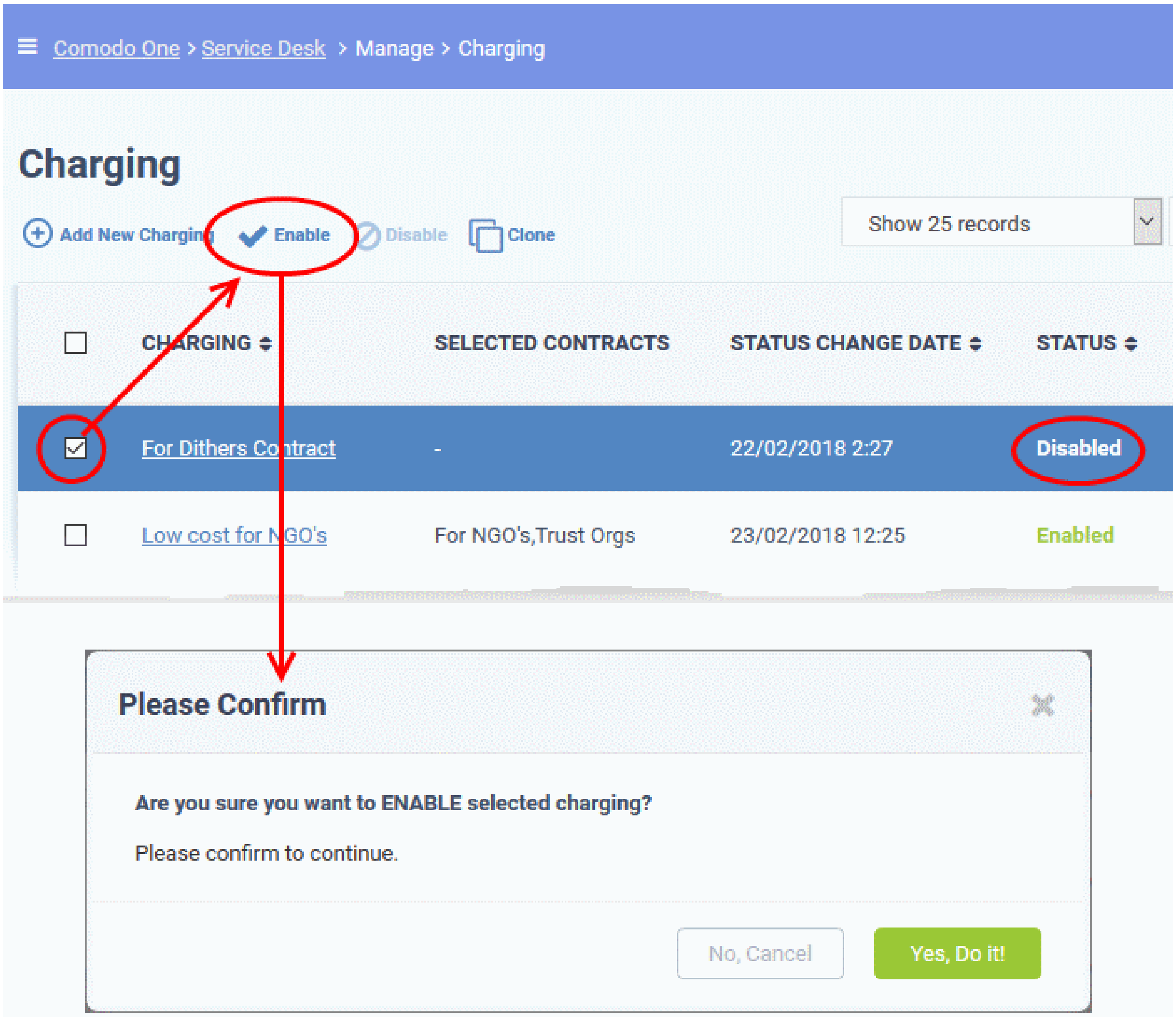
The changes will be applied to the contracts from the time of saving.

Enable/Disable a Charging Plan

- Click 'Admin Panel' > 'Manage' > 'Charging' > select a plan > click the 'Enable' or 'Disable' button above the table.
- A plan must be enabled before it will apply to a contract.
- If a charging plan is disabled, it will be removed from the contracts to which it was applied. The contracts will be set for default charging as configured in them.
- Disabling a plan will also deselect the contracts in the plan details page. You cannot just re-enable the plan, you must go into the plan details page and re-select the contract(s) you require. See **Edit a Charging Plan** for more details on the options in this interface.

To enable or disable a charging plan

- Open the 'Admin Panel' (see last link on the left)
- Click 'Manage' then 'Charging'
- Select a charging plan with 'Disabled' status and click 'Enable' at the top to enable it



- Click 'Yes, Do it! In the confirmation dialog
- Select a charging plan with 'Enabled' status and click 'Disable' at the top to disable it. Click 'Yes, Do it! In the

confirmation dialog.

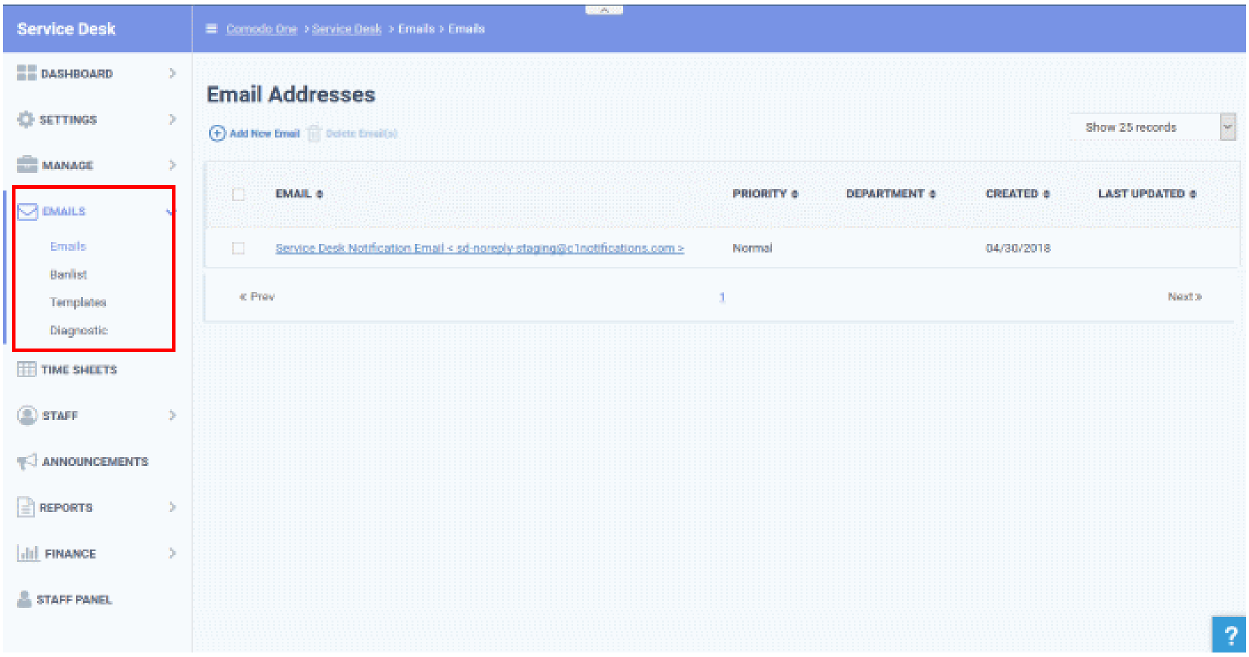
2.4 Email Management

Click 'Admin Panel' > 'Emails' to access the email management sections.

- **Emails** - Specify addresses that can be used to send system emails. Examples include welcome emails and notifications.
    - Addresses added here will be available in **Settings > Email Settings and Options** for you to select as system and alert email addresses.
- **Banlist** - Mail from banned addresses will be automatically rejected.
- **Templates** – Define templates for alerts, announcements and end-user tickets.

Service desk can also send notifications in batches after a certain period of time, or after a certain quantity of notifications has built up. Please contact your account manager if you wish to enable this feature.

- Click 'Admin Panel' > 'Emails':



If you are logged into service desk then emails will be fetched every 3 minutes. If you are not logged in then mails are fetched every ten minutes.

The following sections explain more about:

- **Email Addresses**
- **Banned Emails**
- **Email Templates**
- **Testing Outgoing Email Settings**

2.4.1 Email Addresses

- End users can create tickets by sending an email to your support email address. The 'Email Addresses' area allows you to add and manage your support email address(es). All messages sent to these addresses will be converted to a support ticket and automatically assigned to a particular department.
- The addresses you add here will also be available for selection in **Settings > Email Settings and Options** as the addresses from which system emails are sent.

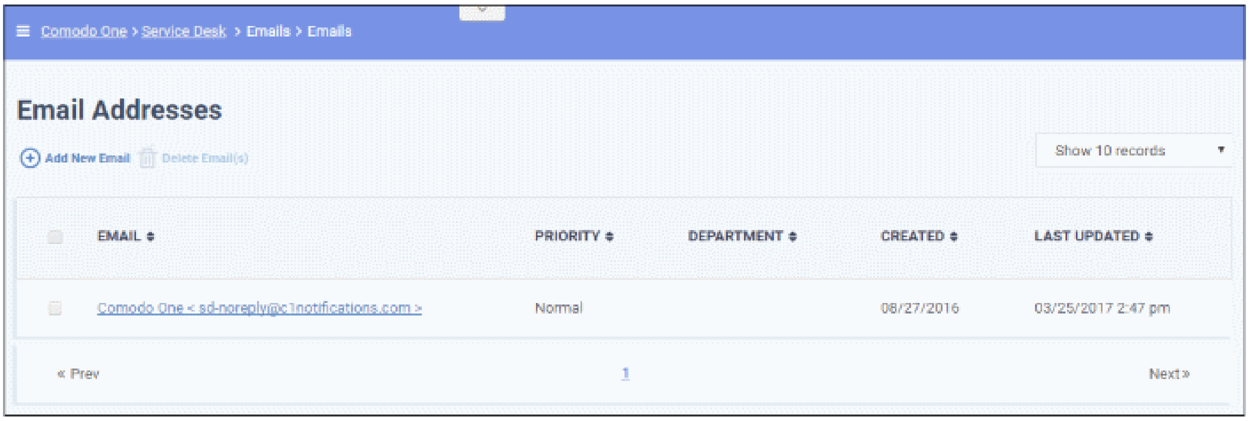
- The default notification email address which ships with Service Desk cannot be deleted or edited. However, you can create your own addresses which can, of course, be edited or deleted. You can edit, but not delete, addresses which are currently being used to send system and alert emails.

Emails sent to these addresses can be fetched for ticket creation in two ways:

- **Fetching emails via forwarding** - Service Desk creates a specific email address for forwarding. You can implement a rule in your mail account to forward mails to this new address. Mails received at the address will be converted into tickets.
- **Fetching email via IMAP or POP** - You can configure Service Desk to fetch mails from the email account directly by specifying its MTA parameters.

To open the 'Email Addresses' interface

- Click 'Emails' on the left then 'Emails' in the Admin Panel



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'.

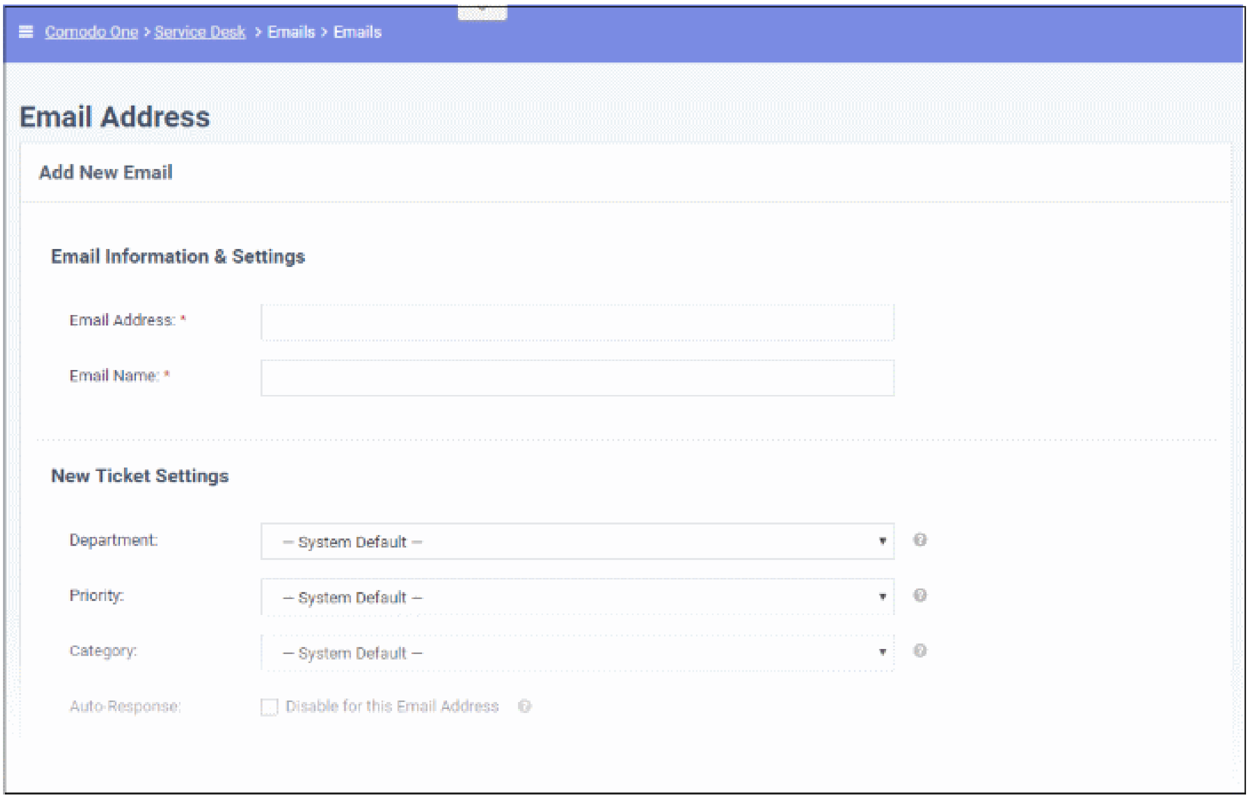
Column Headers

- **Email**: The name specified for the email address and the email address
- **Priority:** Priority level assigned to tickets created by sending an email to the address in the 'Email' column.
- **Department**: The department that the ticket will be assigned to when a user sends an email to the address in the 'Email' column. The default email will apply to a department if no custom email is set.
- **Created:** The date on which the email address was added
- **Last Updated:** The date and time the email was edited and updated

To add a new email address

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

The 'Add New Email' screen will be displayed:



Email Information & Settings

- **Email Address:** Enter the email address of the account to which users should send emails for creating tickets or the email address from which the system and alert emails are to be sent.
- **Email Name:** Enter a unique name for the address to identify the address

New Ticket Settings

- **Department:** Select the department to which the ticket created via this email will be automatically assigned. See **Departments** for more details.
- **Priority**: Select the priority level to be assigned to the ticket created via this email address
- **Category:** Select the ticket category that should be associated for tickets created via this email address. See **Ticket Categories** for more details.
- **Auto-Response:** If selected, auto-response mails will not be sent the users when a new ticket is created via this email address

Email Login Information

- **Username**: The username of the email account. This is usually the same as the email address.
- **Password:** The password for the email account

The email account credentials will be used by the Service Desk to fetch emails from the given address for incoming mails from IMAP/POP and to send mails via SMTP.

Fetch Email via Forwarding

- Use this option if you want Service Desk to create tickets from mails forwarded to a specific address.

A specific email address will be created for your MSP account and displayed in the 'Email for forwarding' field.

- Configure the your mail box to forward emails to this address.

Note:

- To confirm that you can receive mail at the forwarding address, some mail boxes send a verification code to the new address.

- This verification code should be pasted in the mailbox configuration page to complete the forward configuration.
- You can view the verification code sent by your mailbox as a ticket in the 'Tickets' interface. See **Managing Tickets** for more details.

To view the verification code

- Open the 'Staff Panel' and click 'Tickets' > 'Open' on the left

A new ticket will be created containing the verification code.

- Copy the verification code and enter it to the mail box configuration page.

Fetch Email via IMAP or POP

- Enable this option if you want Service Desk to receive emails directly from your mail box for ticket creation
- Enter the MTA parameters in the respective fields.

Sending Email via SMTP

- Use this option if you want Service Desk to send outgoing system emails using this email address
- Enter the MTA parameters in the respective fields.

Internal Notes

Add any notes related to the email address for internal purpose.

- Click the 'Submit' button

If the status in the incoming and outgoing mail settings are enabled, then the Service Desk will check all the parameters and if found correct, the email address will be added to the list.

To edit an email address

- Click on the Email address in the list.

The 'Update Email' screen will be displayed. The update procedure is same as explained above while **adding** a new Email address.

To delete an email address

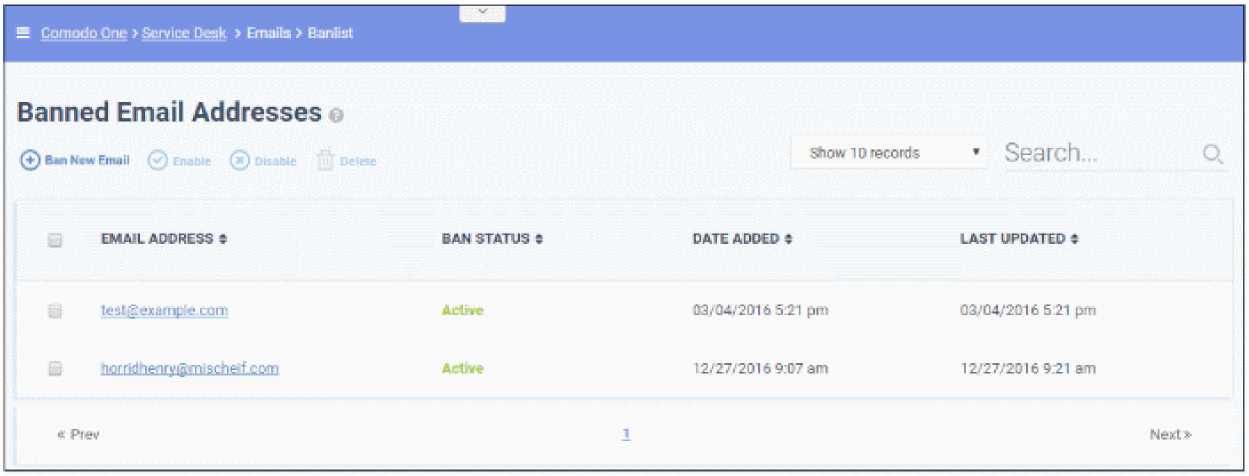
- Select the email address that you want to delete from the list , click 'Delete Email' at the top. Please note you cannot delete emails that are associated with **Departments**.

2.4.2 Ban List

You can configure Service Desk to reject tickets from certain senders by banning their email address. Banned users can still login to the client portal but they will not be able to create tickets.

To open the 'Banned Emails' interface

- Make sure you are in the 'Admin Panel'
- Click 'Emails' on the left then 'Banlist'

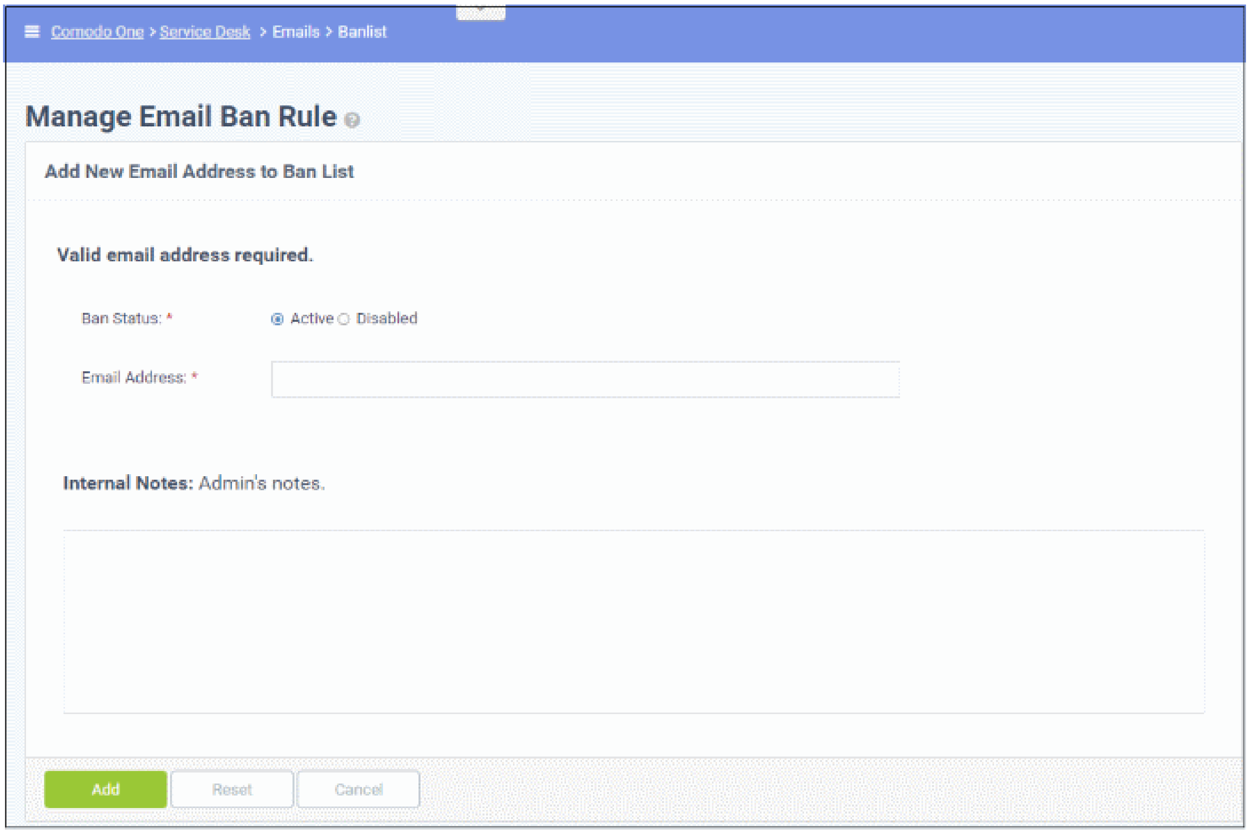


'Enable' and 'Disable' buttons - Enforce or relax the ban on selected emails.

To add a new email address to the ban list

- Click the 'Ban New Email' button along the top

The new ban rule screen will open:



- **Ban Status:**
    - Active - mails from this email address will be rejected.
    - Disabled - mails from this address will be permitted.
- **Email Address:** The email address you want to add to the rule
- Click the 'Add' button to create the new rule

The email address will be added to the banned list.

- You can edit the rule at any time by simply clicking the address link in the 'Email Address' column.

- You can delete a rule by selecting it in the list then clicking the 'Delete' button above the table.

2.4.3 Email Templates

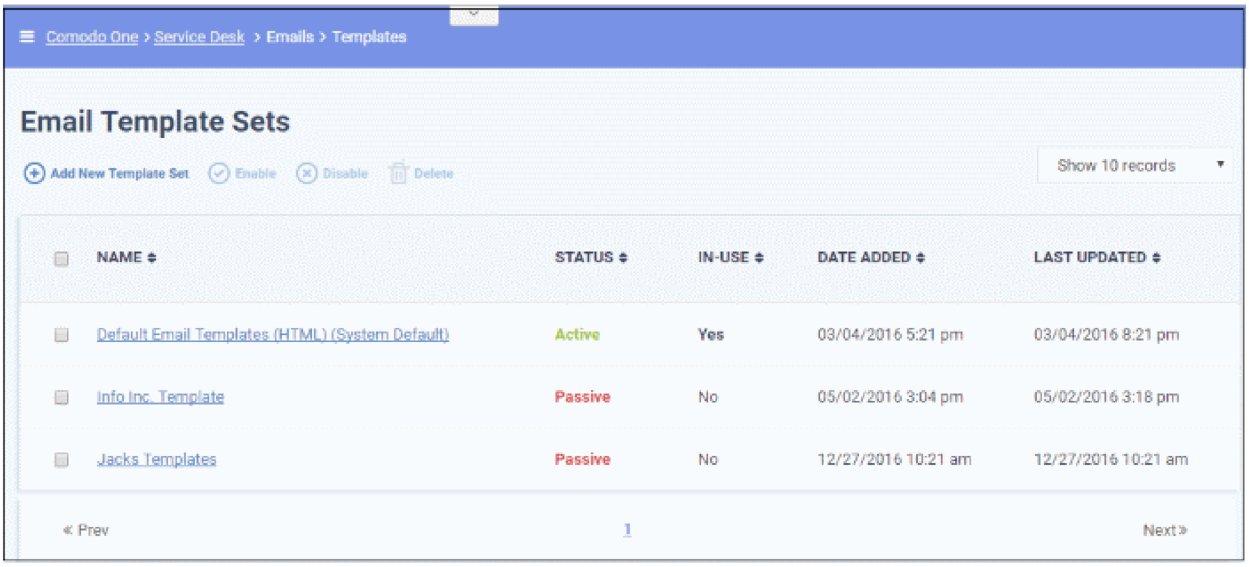
- Template sets can be used to standardize announcements, report notifications, staff tickets and user tickets.
- Custom email templates can be created by cloning an existing set then editing the templates as required.
- Template sets will be available for selection in **Settings > Emails** and **Staff > Departments**.

There are four email template sets:

- **Scheduled Reports Templates:** Templates for mails sent to staff members who receive scheduled reports
- **System Management Templates:** Templates for announcements sent to staff members
- **Staff Ticket Templates:** Templates for alert emails sent to staff members when a predefined setting is triggered
- **End-User Ticket Templates:** Templates for automatic emails sent to end-users.

To open the 'Email Template Sets' interface

- Open the 'Admin Panel'
- Click 'Emails' on the left then 'Templates'



Sorting the items

- Clicking on a column header sorts the 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 records per page. You can navigate to different pages by clicking 'Next' and 'Prev' at the bottom.

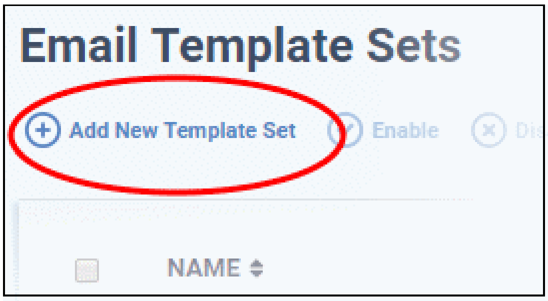
Column Headers

- **Name:** The name of the email template
- **Status:** Indicates whether the template is enabled or disabled. Active templates will be available for selection in **Settings > Email Settings and Options** and **Staff > Departments**.
- **In-use**: Indicates whether the template is being used in **Settings > Email Settings and Options** or **Staff > Departments**.
- **Date Added:** The date on which the email template was added

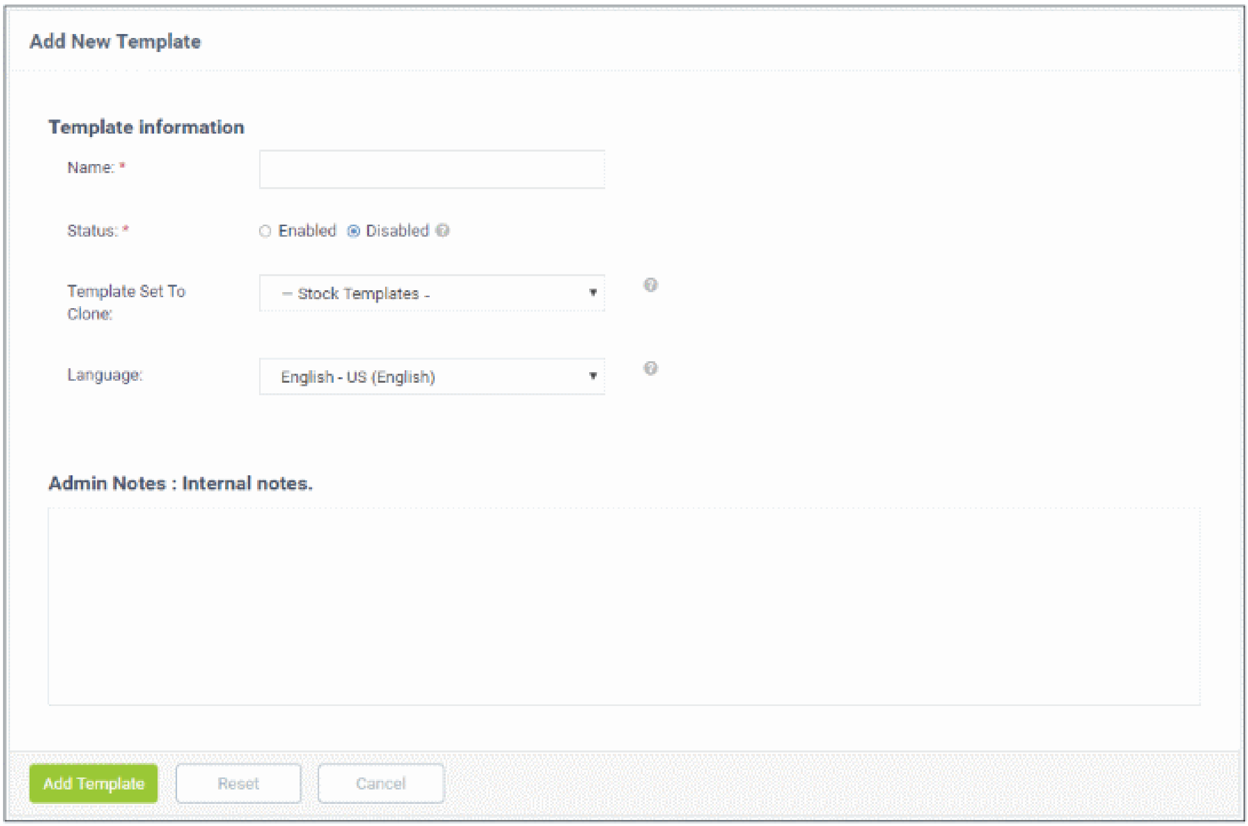
- **Last Updated:** The date and time the email template was edited and updated

To add a new email template set

- Click the 'Add New Template Set' link at the top



The 'Add New Template' screen will open:



Template Information

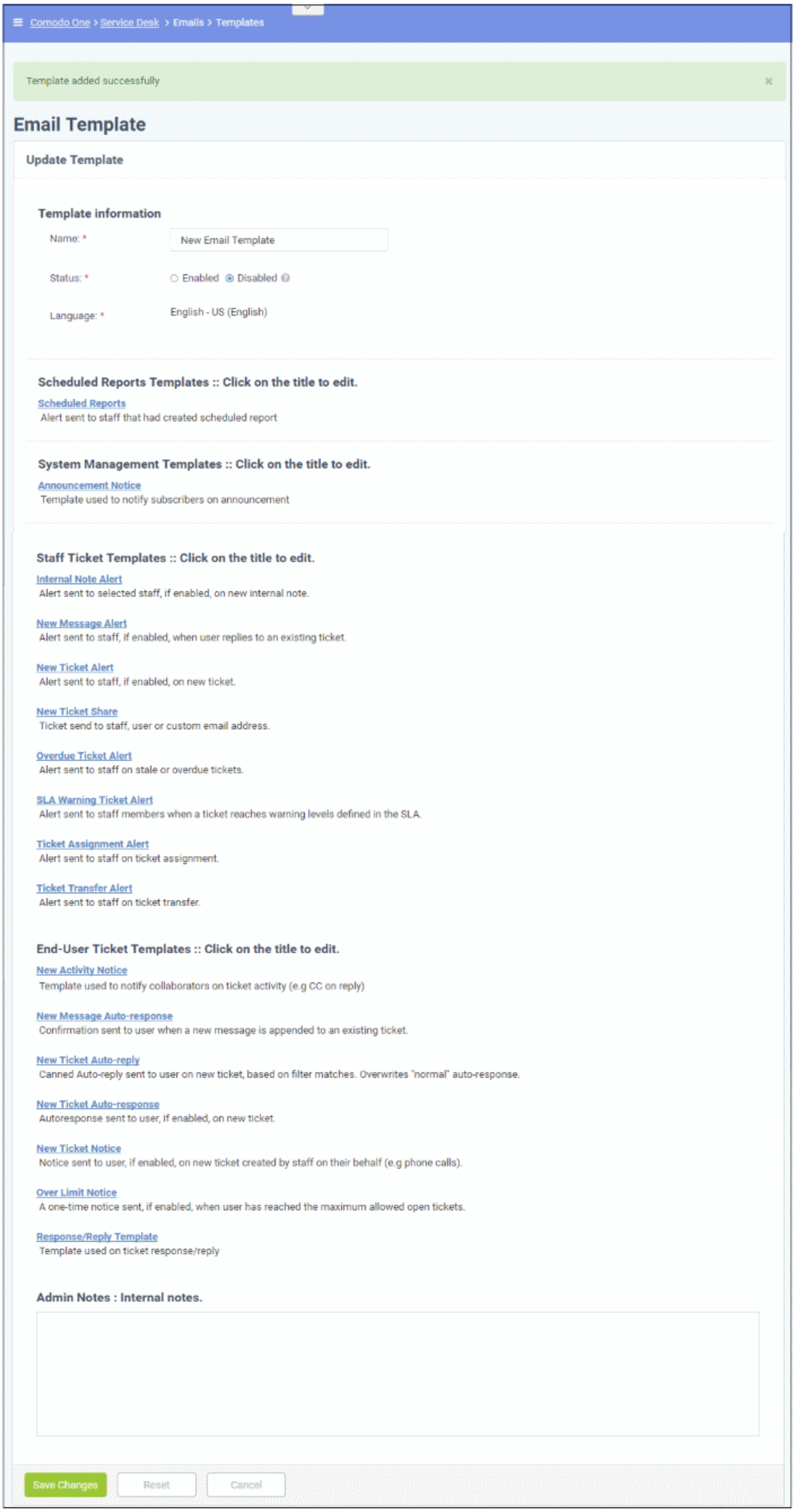
- **Name:** Enter a label for the template set
- **Status:** Select whether the template set should be active or disabled. Active templates will be available for selection in **Settings > Email Settings and Options** and **Staff > Departments**.
- **Template Set To Clone:** Select an existing template set to be used as the starting point. The new template set will be a clone of the chosen set.
- **Language:** Select the language for the new email template set

Admin Notes:

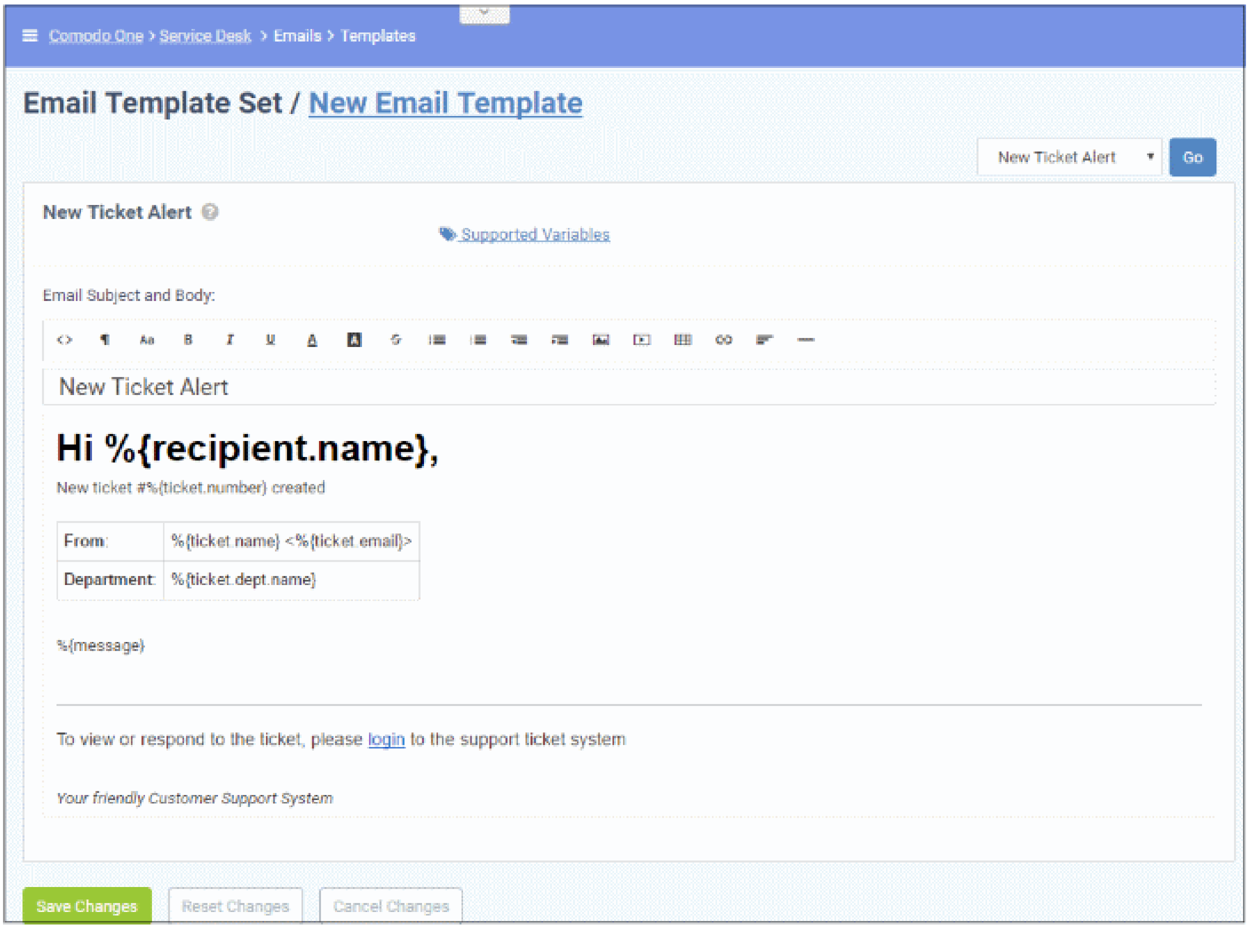
Add internal notes about the set.

- Click the 'Add Template' button at the bottom of the interface

The template set will be created. The set will contain message template messages same as the chosen stock template set. You can edit the templates for each of the categories: Scheduled Reports Templates, System Management Templates, Staff Ticket Templates and End-User Ticket Templates.



Clicking on any template will open the email subject and body for you to edit. For example, the following screenshot shows the 'New Ticket Alert' template in the 'Staff Ticket Template' category:



You can select other email templates by clicking the drop-down button located on the right and clicking the 'GO' button.

Scheduled Reports Templates

- **Scheduled Reports:** Template used to notify staff members that a report is ready.

System Management Template:

- **Announcement Notice:** Email template used for staff **Announcements**.

Staff Ticket Templates:

- **Internal Note Alert:** Sent to selected staff members when a new internal note is added to a ticket. This can be enabled or disabled in 'Admin Panel' > 'Settings' > 'Alerts & Notices' in the 'New Internal Note Alert' section.
- **New Message Alert:** Sent to staff members when a user replies to an existing ticket. The alert can be enabled or disabled in 'Admin Panel' > 'Settings' > 'Alerts & Notices' in the 'New Message Alert' section.
- **New Ticket Alert:** Sent to staff members when a new ticket is created. This can be enabled or disabled in 'Admin Panel' > 'Settings' > 'Alerts & Notices' in the 'New Ticket Alert' section.
- **Overdue Ticket Alert:** Sent to staff members when a ticket has is overdue. This can be enabled or disabled in 'Admin Panel' > 'Settings' > 'Alerts & Notices' in the 'Overdue Ticket Alert' section.
- **SLA Warning Ticket Alert:** Sent to staff members when warning levels defined in **Service Level Agreements (SLA)** are triggered for a ticket.
- **Ticket Assignment Alert:** Sent to staff members when a ticket is assigned to them. This can be enabled or disabled in 'Admin Panel' > 'Settings' > 'Alerts & Notices' in the 'Ticket Assignment Alert' section.

- **Ticket Transfer Alert:** Sent to staff members when a ticket is transferred to them. This can be enabled or disabled in 'Admin Panel' > 'Settings' > 'Alerts & Notices' in the 'Ticket Transfer Alert' section.

End-User Ticket Template:

- **New Activity Notice:** Sent to end-users when there is a new response to one of their active tickets.
- **New Message Auto-response:** Sent to end-users after they post a new message to a ticket.
- **New Ticket Auto-reply:** Sent to end-users for new tickets with canned response based on **ticket filter** matches.
- **New Ticket Auto-response:** Sent to end-users when a new ticket is created by them. The alert can be enabled or disabled in Admin Panel > Settings > Autoresponder.
- **New Ticket Notice:** Sent to end-users when a new ticket is created by an admin/staff on their behalf. The alert can be enabled or disabled in Admin Panel > Settings > Autoresponder.
- **Over Limit Notice:** Sent to end-users when maximum allowed open tickets is reached. This is configured in Admin Panel > Settings > Tickets > 'Maximum Open Tickets' under Global Ticket Settings section. The alert can be enabled or disabled in Admin Panel > Settings > Autoresponder.
- **Response/Reply Template:** Sent to end-users with canned response/reply alerts for active tickets.

Edit the email template as required and click the 'Save Changes' button at the bottom of the interface.

2.4.4 Test Outgoing Email Settings

Administrators to check whether the alerts and notices for various settings are sent successfully to users and staff members. The email delivery depends on the server settings and/or SMTP settings of the email account used for sending out these emails.

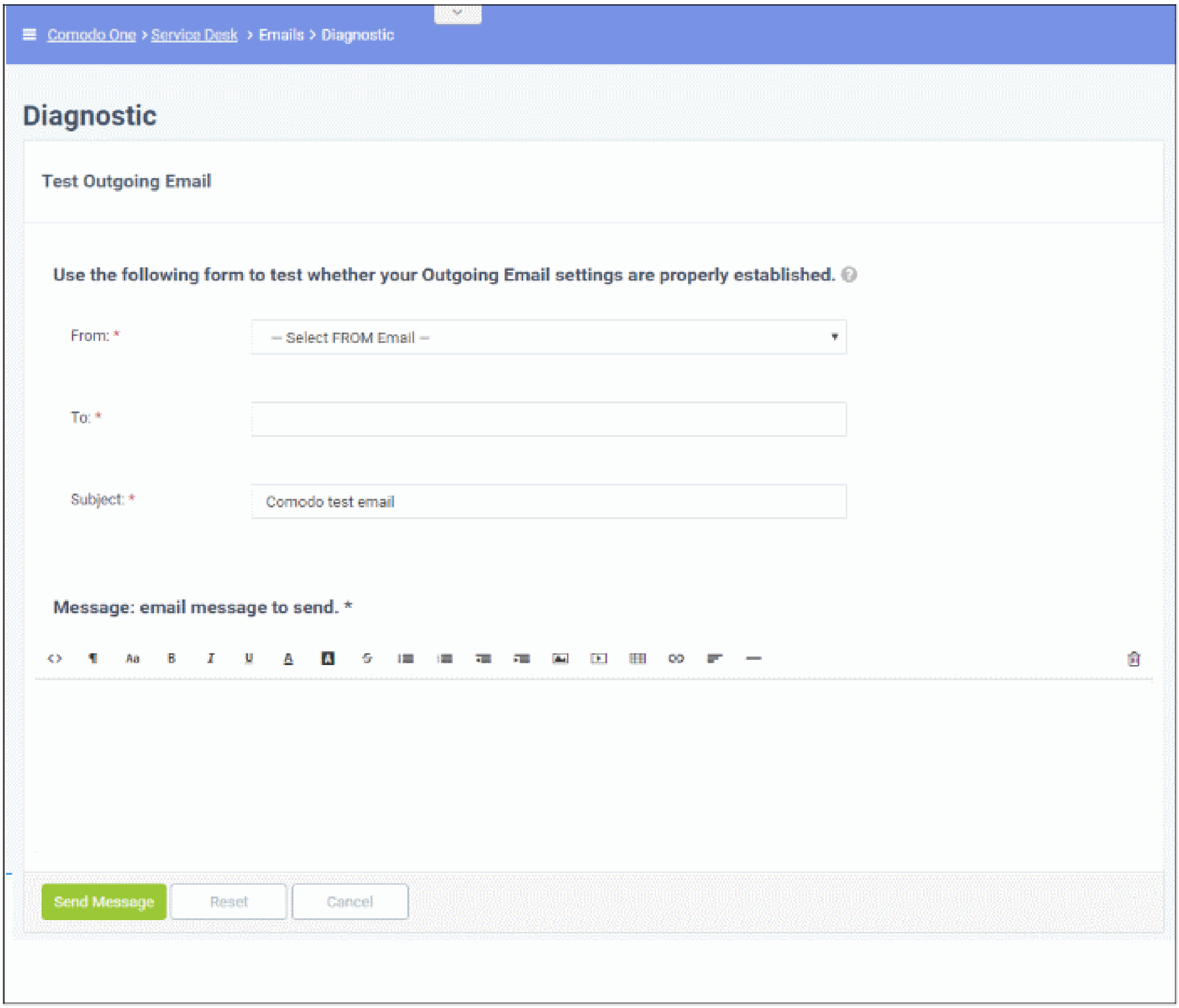
- The email accounts for sending system and alert emails are selected from the Settings > Emails interface. See **Email Settings and Options** for more details.
- The MTA settings for the SMTP server for the emails are configured from the Emails > Emails interface. See **Email Addresses** for more details.

The 'Test Outgoing Email' interface allows administrators to send test mails from the email accounts configured for sending outgoing emails to the email addresses which they can access, to check whether their SMTP settings are valid and active.

To test the outgoing email settings

- Click 'Emails' on the left then 'Diagnostic' in the Admin Panel

The 'Test Outgoing Email' screen will be displayed:



- **From**: Select the outgoing email address to be tested. The drop-down displays the email addresses added in Emails section. Refer to the section **Email Addresses** for more details.
- **To:** Enter the email addresses that you want to receive the test email from the Service Desk
- **Subject:** Enter the subject line for the test mail.
- **Message:** Enter a message for email.

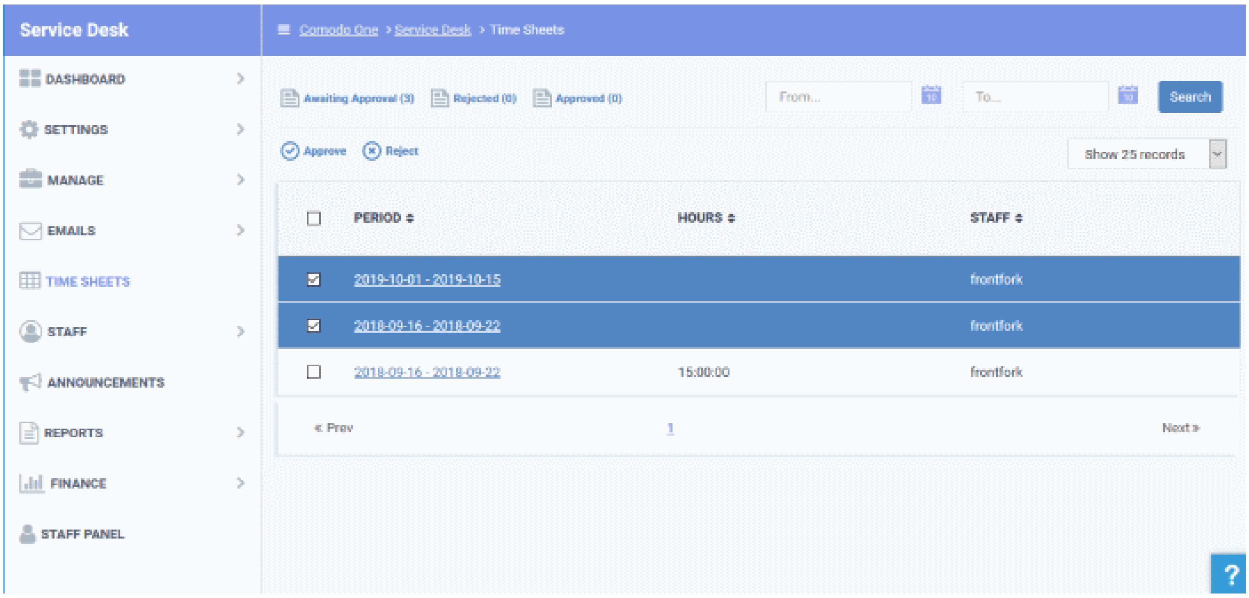
- Click the 'Send Message'. If the outgoing mail settings are configured correctly, then the mail will be delivered successfully.

2.5 Manage Time Sheets

- Click 'Admin > 'Timesheets' to open this interface
- Service Desk staff/agents can create time sheets to record time spent on tickets and other tasks.
  - Staff should click 'Staff Panel' > 'My Time Sheets' to create or update a sheet. See **Manage Staff Time Sheets** if you need more help on this.
- Admins can evaluate submitted timesheets and approve or reject as appropriate.
- Approved sheets are saved for future reference. Rejected time sheets can be updated and re-submitted by staff.
  - You can also generate a report on staff tickets, billable time and materials used. Go to 'Admin Panel' > 'Reports' > '**Agents**' to do so.

To open the 'Timesheets' interface

- Click 'Timesheets' on the left of the Admin Panel



The category options at the top allow you to view the time sheets with different statuses.

- **Awaiting Approval -** Displays time sheets that were submitted but have yet to be analyzed and approved/rejected.
- **Rejected -** Displays time sheets that were rejected by administrators. The rejected sheets can be edited by the staff and re-submitted for approval.
- **Approved -** Displays time sheets that have been approved by administrators. Clicking on a time sheet allows you to view notes from the administrator and the details in the sheet. Approved sheets cannot be deleted.

Column Headers

The column headers for the lists of all categories are the same.

- **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 for analysis.
- **Hours -** Displays the total hours spent by the staff member on the tickets and other tasks, within the time period.
- **Staff -** Indicates the staff to whom the time sheet belongs.

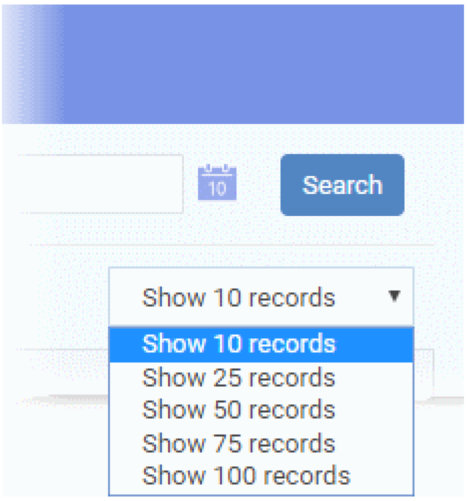
Sorting Options:

- Clicking on any column header sorts the items in ascending/descending order of the entries in that column

Search Options:

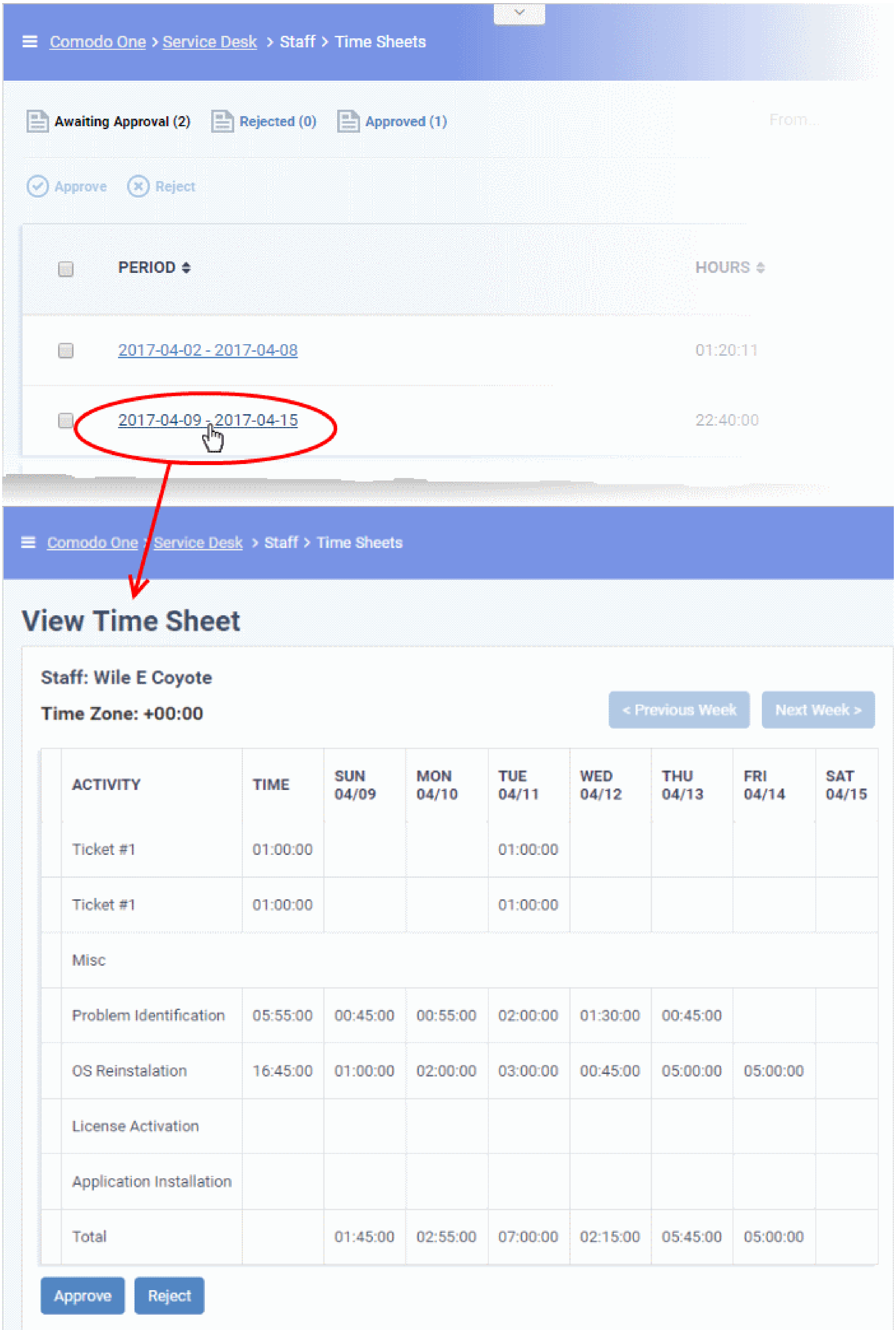
You can search for time sheets that fall within a specific date range.

- Enter the 'From' and 'To' dates using the calendar icons beside the respective fields and click the 'Search' button
- 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 at the top.
- By default, the interface displays 10 items per page. To increase the number of items displayed on a single page, choose the number from the drop-down at the top right.



To view, approve or reject a time sheet

- Click the time sheet to be viewed



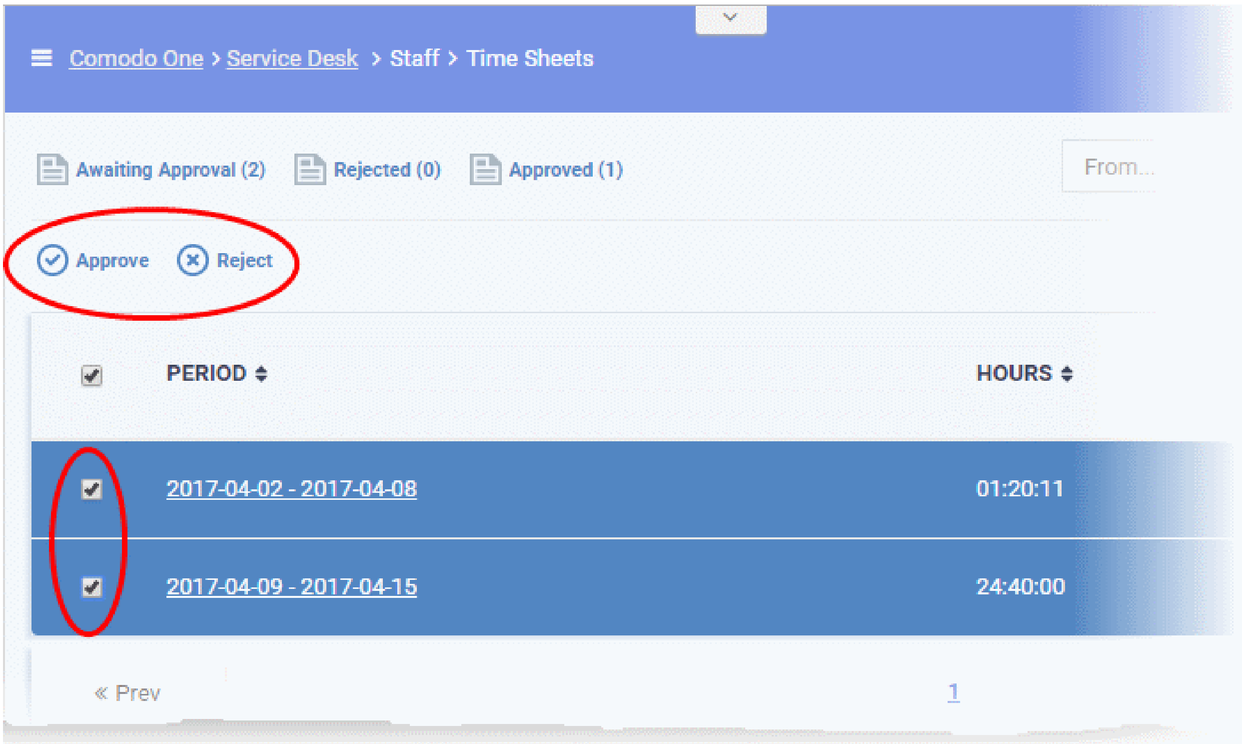
The 'View Time Sheet' screen will appear with the details of tickets and miscellaneous jobs attended by the staff member with spent on them on each day, within the period covered by the sheet. By default, the first week of the period will be displayed. You can navigate through successive weeks using the 'Previous Week' and 'Next Week' buttons at the top right. You can evaluate the performance of the staff using various factors like time spent on the tickets, total working hours on each day and so on.

- To approve the time sheet, click the 'Approve' button
- To reject the time sheet, click the 'Reject' button

The sheet will be moved under respective category.

Alternatively, you can approve more than one sheet at once from the Time Sheets interface.

- To accept several sheets at once, select the sheets from the 'Timesheets' interface and click 'Approve'
- To reject several sheets at once, select the sheets from the 'Timesheets' interface and click 'Reject'



The approved time sheets will be moved to the 'Approved' category and the rejected time sheets will be moved to the 'Rejected' category. You can view those sheets by clicking the respective categories at the top of the interface.

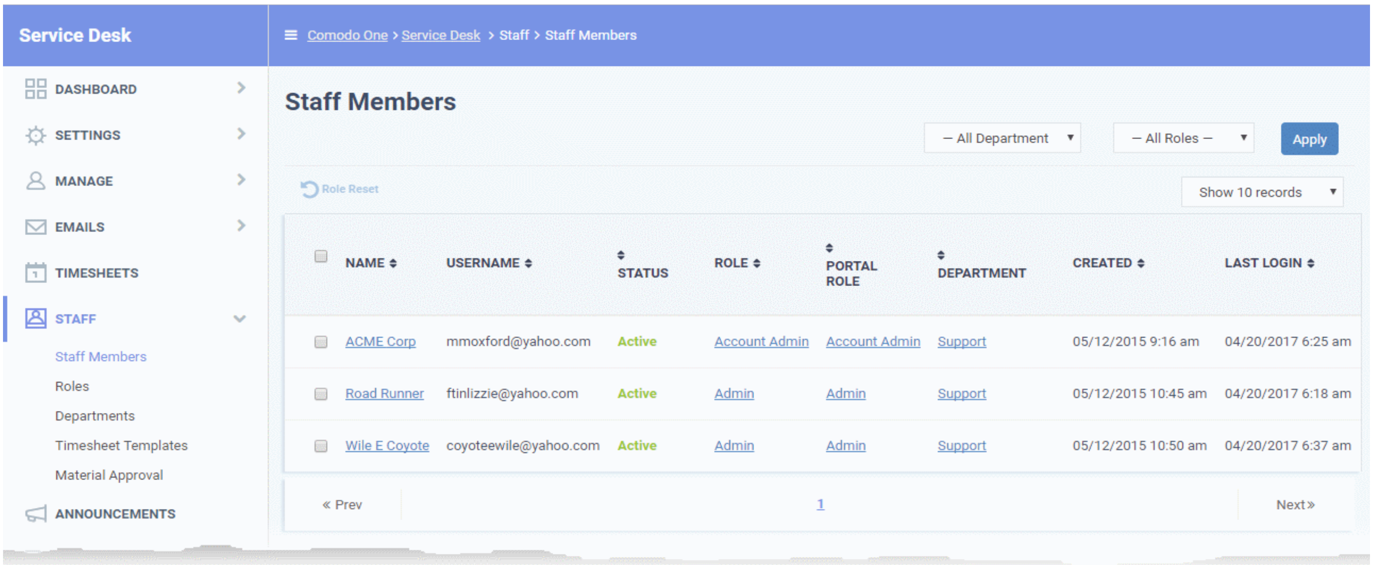
The rejected time sheets will also be displayed under the 'Rejected' category in the 'Staff Panel' for the staff member, to view and edit. See **Updating a Time Sheet** in **Managing Staff Time Sheets** for more details.

After they correct and re-submit a time sheet, it will appear under the 'Awaiting Approval' category. Administrators can review the sheet again and approve or reject it.

2.6 Manage Staff

- Staff Members are the support personnel that attend to tickets created by users in the client portal. In addition to attending to tickets, staff members can also create new tickets on behalf of users. Staff may also be referred to as 'agents'.
- Staff members can be added from the Comodo One interface and assigned with specific roles. Those assigned the 'Administrator' role can access both the 'Admin Panel' and 'Staff Panel'. See Comodo One help at **https://help.comodo.com/topic-289-1-716-8482-Managing-Administrators-and-Roles.html** for details about creating staff.
- Staff permissions are taken from their Comodo One 'Role'. You can also create custom roles with specific privileges in Service Desk itself.

- The 'Staff' option lets admins update staff details, create new roles and departments, create time-sheet templates and review material/expense items.
- Newly added staff will be assigned to the department set as 'System Default' ('Admin Panel' > 'Settings' > 'System'). You can create new departments and assign staff to different departments as required.
  - See **C1 Service Desk System Settings** for help to set a department as the default
  - See **Departments** for more details on creating new departments
  - See **Update a staff member** in **Staff Members** for help on assigning staff to a department
- Click 'Admin Panel' > 'Staff'



Following sections explain more about:

- **Staff Members**
- **Staff Roles**
- **Departments**
- **Timesheet Templates**
- **Material Approval**

2.6.1 Staff Members

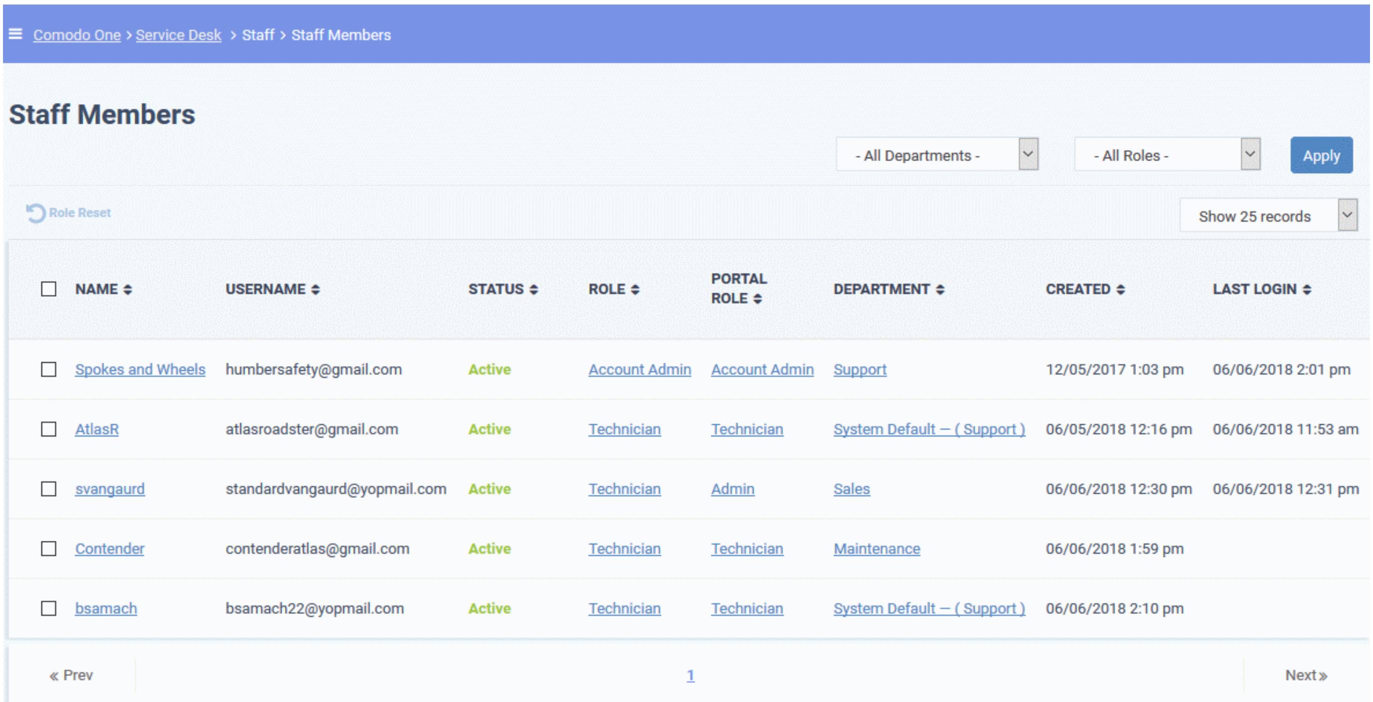
- Click 'Admin Panel' > 'Staff' > 'Staff Members'
- The 'Staff Members' interface you to view and manage staff members (a.k.a. 'Agents'), update their details, assign them to respective departments, change their roles and more.

Notes:

- You can only add new staff members through the Comodo One interface. See **https://help.comodo.com/topic-289-1-716-8482-Managing-Administrators-and-Roles.html** for help to create staff.
- Newly added staff will be assigned to the department set as 'System Default' ('Admin Panel' > 'Settings' > 'System'). You can create new departments and assign staff to different departments as required. See **C1 Service Desk System Settings** for more details.
- Service Desk also imports staff members with their roles from C1. The role determines their permissions with the Service Desk interface. You can also create custom roles for staff in Service Desk.
- You can assign staff to different departments as required.

To manage staff members

- Open the 'Admin panel' (see last link on the left)
- Click 'Staff' on the left then choose 'Staff Members'



Sorting the items

- Click a column header to sorts the items in ascending/descending order of entries in that column.

Filters

- Select a Department and/or Role from the drop-downs and click 'Apply' to filter staff members by department/role.
- To display all staff members, select 'All Departments' and 'All Groups' then click the 'Apply' button.
- By default, the interface displays 10 staff members per page. To increase the number of staff members displayed on a single page, choose the number from the drop-down at the top right.

Column Headers

- **Name**: The full name of the staff member. Clicking a name will open the 'Update Staff' screen which allows you edit their details and change their role. See **Update a staff member** for more information.
- **User Name:** The C1 Service Desk login username that was entered in the Username field while adding the staff member.
- **Status**: Indicates whether the staff member is active (able to access service desk), or locked (unable to access service desk).
- **Role**: Indicates the role assigned to the staff member with respect to Service Desk. The staff member will have privileges and access to various features, depending on the permissions enabled for the role. You can change the role assigned to the staff member from the 'Update Staff' dialog. See **Update a staff member** for more details.
  - Click a role name view and edit the permissions for that role. See **Staff Roles** for details.
- **Portal Role -** Indicates the role assigned to the staff member in the Comodo One Portal. Staff access to the C1 console and other C1 modules depends on the permissions enabled for the role. There are three default roles in C1 that are not editable:
  - Account Administrator

    - Administrator
    - Technician

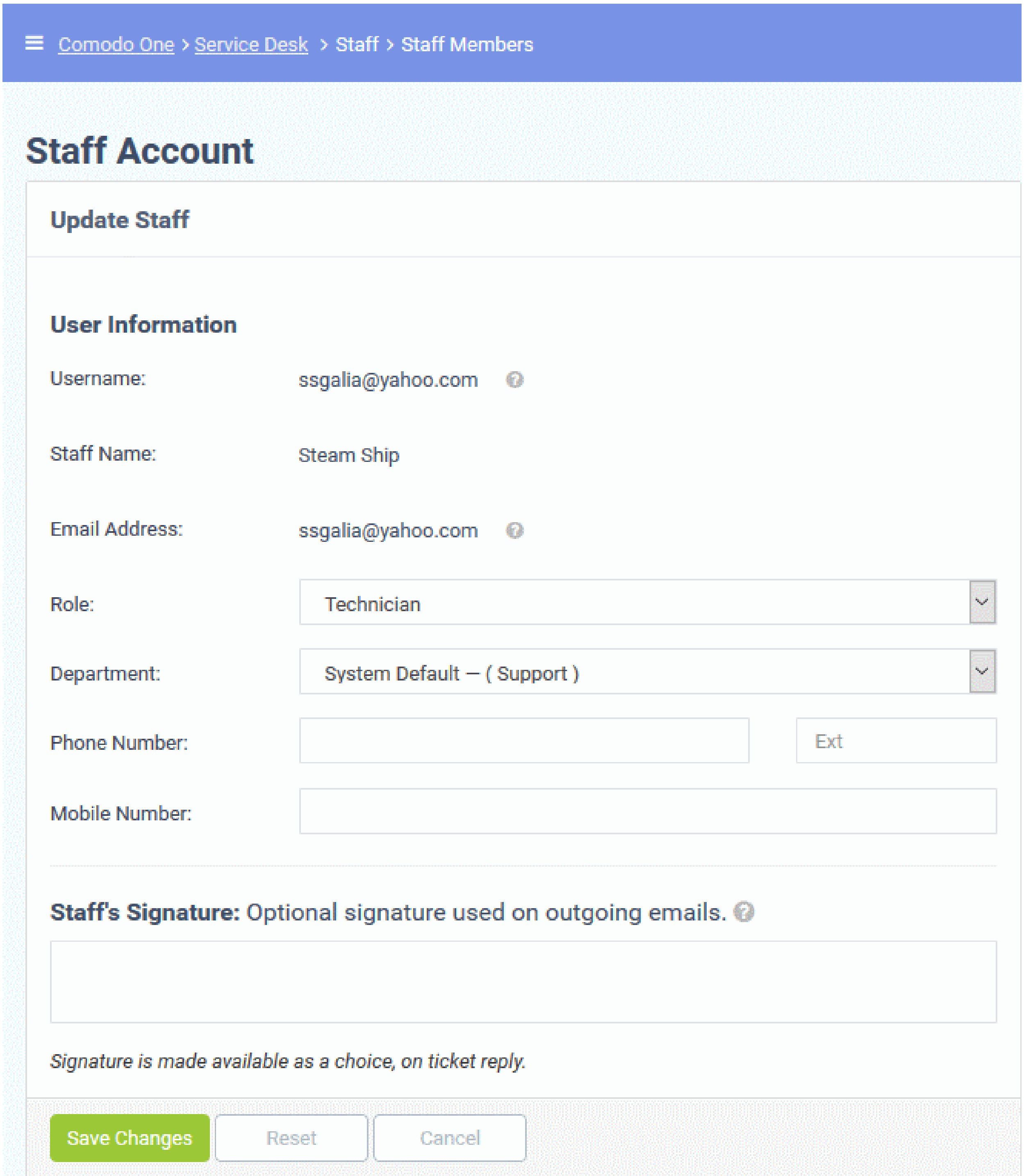
  C1 also allows administrators to create custom roles by cloning a default role then edit its permissions. If a staff member is assigned with a custom role in C1, the portal role column displays the default role from which the custom role was created.

- See online help page at **https://help.comodo.com/topic-289-1-716-11210-Managing-Roles.html** for more details.
- **Department**: Indicates the department to which the staff member belongs. You can change the department to which a staff member belongs, by updating the staff details. See **Update a staff member** for more details.
    - Click a department name to view and edit the details of the department. See **Departments** for details.
- **Created**: The date at which the staff member was added to Comodo One.
- **Last Login**: The date and time the staff member most recently logged into Service Desk.

Update a staff member

- Click the name of the staff member.

The 'Update Staff' screen will appear:



The 'Update Staff' interface allows you to view and edit the staff member's phone number, department and role. You can also edit the signature appended to the outgoing response mails for the tickets attended by the staff member.

User Information:

- **User Name -** The username with which the staff member can log into Comodo One and Service Desk
- **Staff Name -** The full name of the staff member
- **Email Address -** The email address of the staff member

Note: The username and the email address cannot be edited. If required, the Account Administrator can edit the staff name from the Comodo One console. For details see online help page of Comodo One at **https://help.comodo.com/topic-289-1-716-11209-Managing-Administrators.html**.

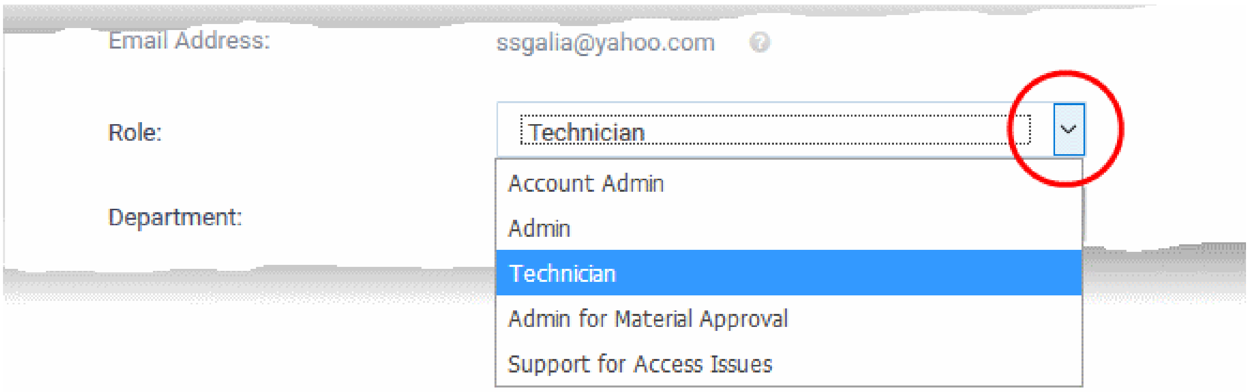
- **Role -** The role assigned to the staff member in service desk. Staff added through the Comodo One console will inherit the role (and permissions) assigned to them in C1. By default, three roles are available in C1.

- Account Administrator
- Administrator
- Technician

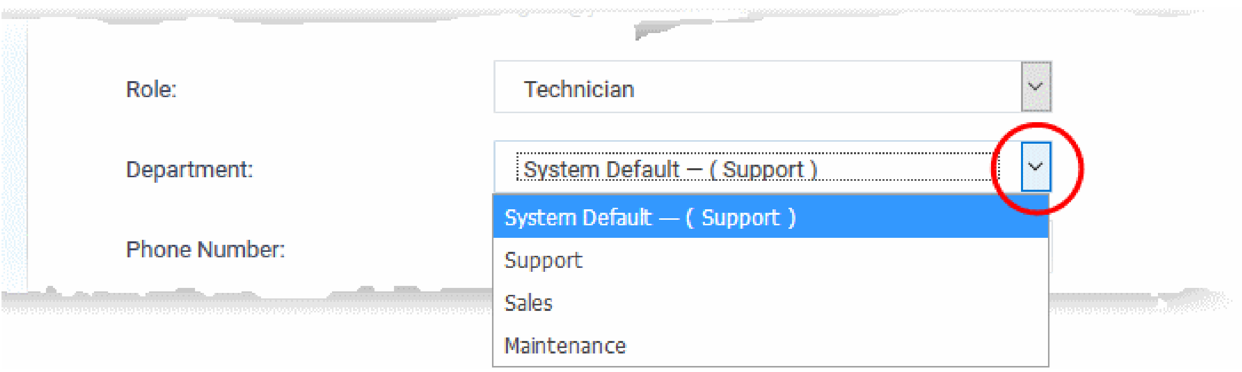
But the role can be changed for a staff member with respect to Service Desk from this interface. The new role will be effective only in Service Desk and will not apply in other Comodo One modules. For more details, see **Staff Roles**.

Tip: You can also revert the role assigned for a staff from service desk to the role originally assigned from the C1 console through the Staff Members interface. See **Reset the Role Assigned to a Staff** for more details.

- To change the role, choose the new role from the 'Role' drop-down



- **Department -** The department to which the staff member belongs.
  - Staff members newly added through Comodo One will be auto-assigned to the department set as 'System Default' in 'Service Desk'. See **C1 Service Desk System Settings** for more guidance on setting default department.
  - Service Desk ships with three default departments.
    - Support
    - Sales
    - Maintenance
  - You can add any number of departments as required. See **Departments** for more guidance on managing departments.
  - You can change the department for the staff member as required.
  - To change the department, select the department from the 'Department' drop-down.



- **Phone Number**: Enter the contact desk phone number and extension number, if any, of the staff member
- **Mobile Number**: Enter the mobile phone number of the staff member

Staff's Signature

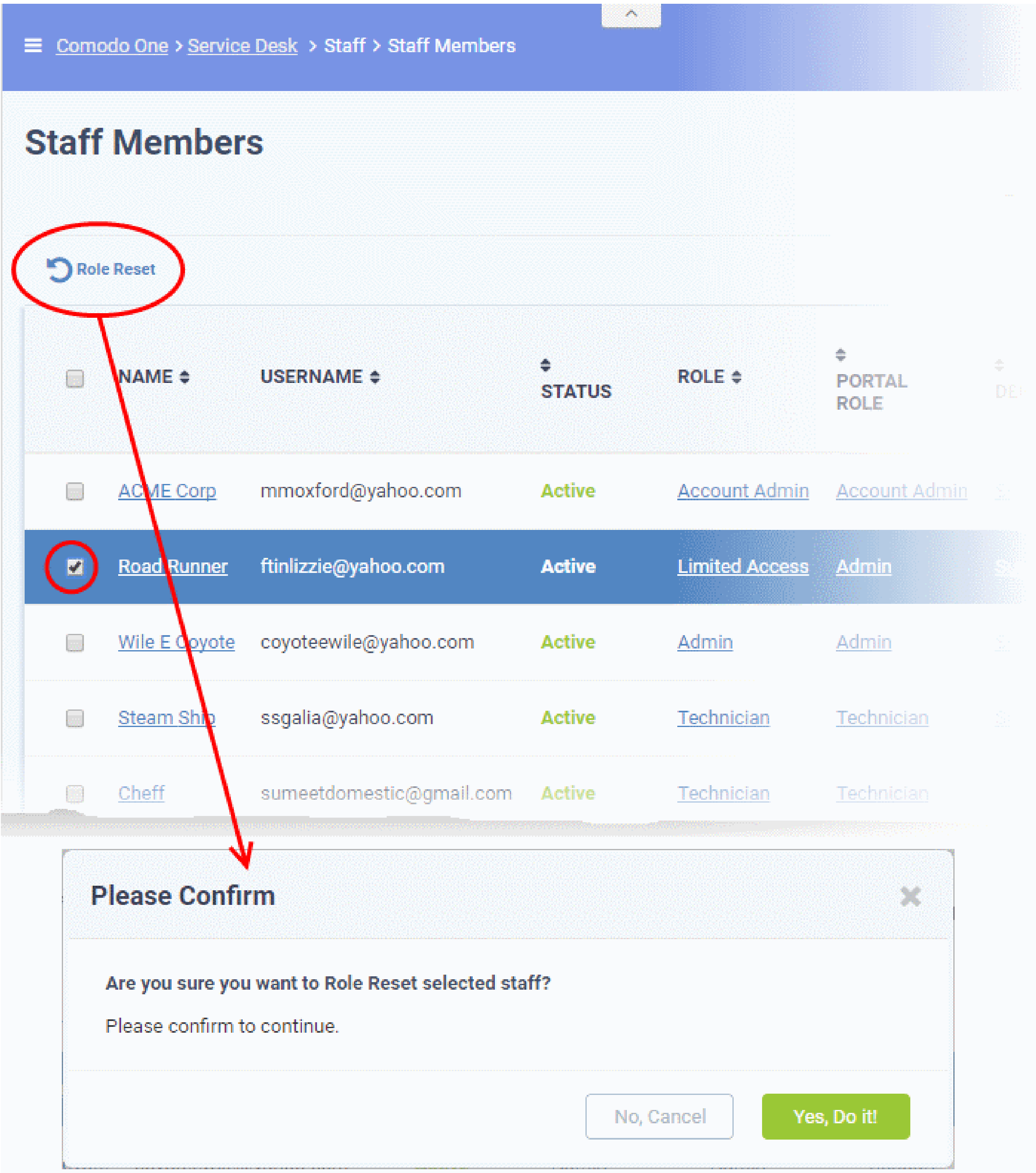
- Paste the signature that should be displayed in the staff member's email responses to customers. The option to include the signature is available in the 'Ticket Details' interface of the 'Staff Panel'.
- Click the 'Save Changes' button to update the staff member details.

Reset the Role Assigned to a Staff

A staff member inherits the role assigned to him/her through the C1 console for accessing the Service Desk module. However, Service Desk allows administrators to create new roles and assign them to the staff members selectively. If required at a later time, administrators can re-assign staff members with their original roles as assigned through the C1 interface by resetting the role.

To reset the role assigned to a user

- Select the user(s) from the 'Staff Members' interface and click 'Role Reset' at the top left.



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

The role assigned to the user will be reverted to the role as assigned through the C1 console.

2.6.2 Staff Roles

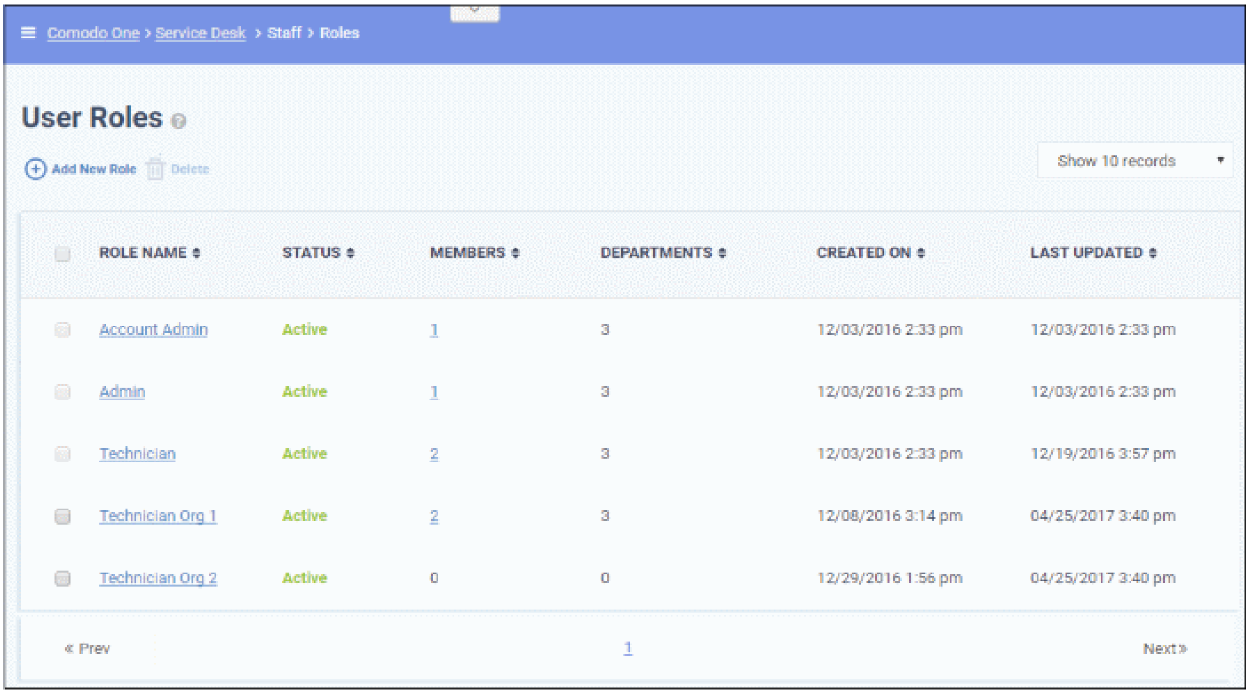
- Click 'Admin Panel' > 'Staff' > 'Roles'
- Staff roles determine the permissions and access rights that staff members have within the service desk interface.
- Service Desk inherits three default roles from Comodo One:
    - Account Administrator
    - Administrator
    - Technician
- You can also create custom roles with different permissions
- Roles can be configured to provide access to **departments** other than a staff member's primary department.
- The 'Account Administrator' and 'Administrator' roles inherited from Comodo One cannot be deleted. These roles initially have access to all areas and full control over all departments. The roles can be edited at anytime. See **editing a role** for more details.

New staff members added in Comodo One will be placed in the role assigned to them in Comodo One.

Admins can move staff to another role through the 'Staff Members' interface. See **Update a staff member** for more details.

To open the 'User Roles' interface

- Open the 'Admin Panel'
- Click 'Staff' on the left then 'Roles'



Column Headers

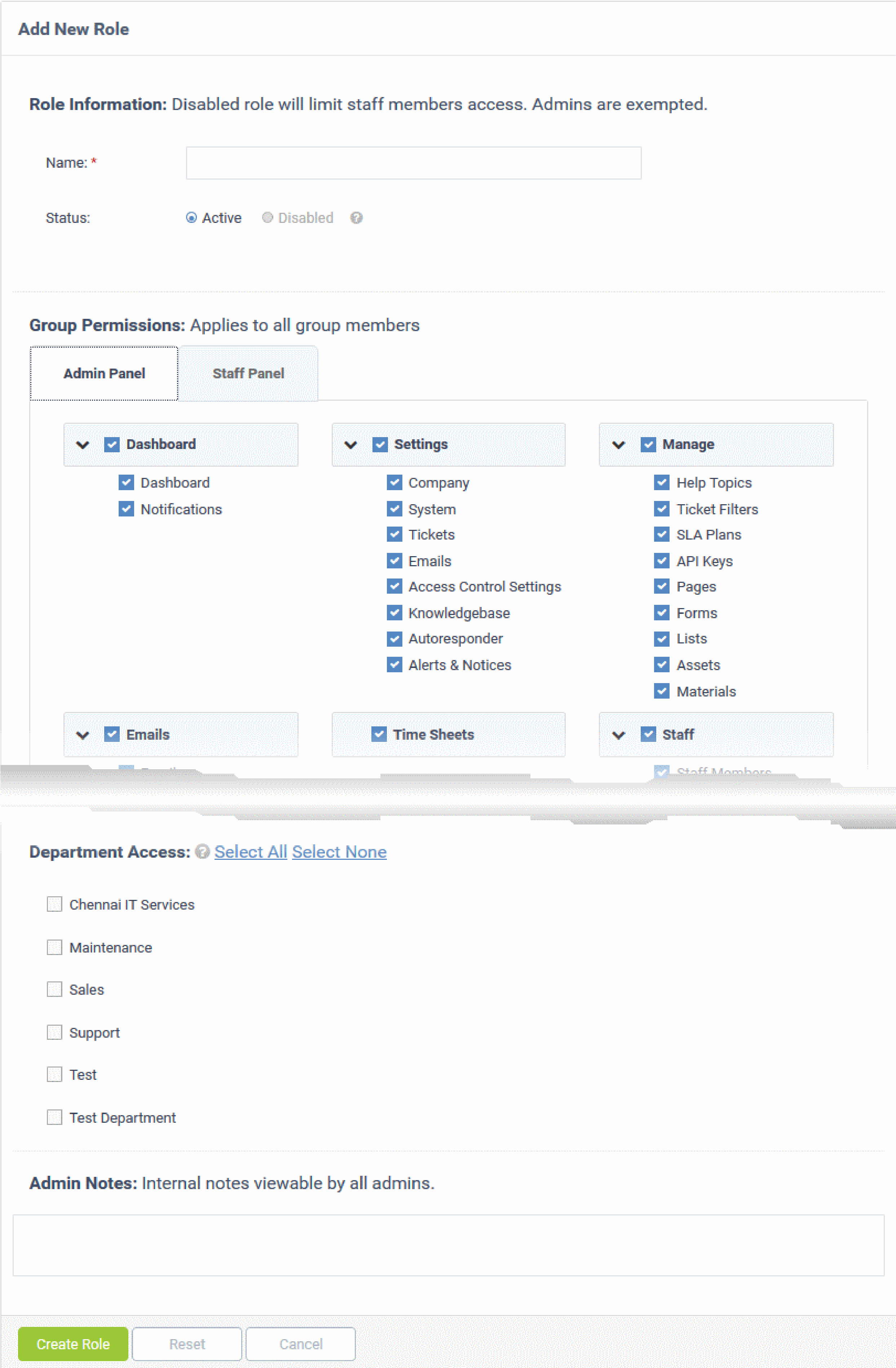
- **Role Name**: The role label. Click the role name to open the **Update Role** screen.
- **Status**: Indicates whether the role is enabled or disabled.

- **Members**: The number of staff members assigned to the role. Click the number to view the member list.
- **Departments**: The number of departments that can be accessed by role members.
- **Created On**: The date on which the role was created.
- **Last Updated**: The date and time the role was last modified.

To activate or deactivate a role, select the check-box beside a role and click the 'Enable' or 'Disable' button.

To add a new role

- Click the 'Add New Role' link at the top
- From top-to-bottom, role permissions are split in to three main groups:
    - Access permissions - which areas of the staff/admin panels are available to role members.
    - Functional permissions - what actions role members can or cannot do.
    - Department access - which departments role members are allowed to access.


Add New Role
Role Information: Disabled role will limit staff members access. Admins are exempted.
Name: *
Status:
Active
Disabled
Group Permissions: Applies to all group members
Admin Panel
Staff Panel
Dashboard
Dashboard
Notifications
Settings
Company
System
Tickets
Emails
Access Control Settings
Knowledgebase
Autoresponder
Alerts & Notices
Manage
Help Topics
Ticket Filters
SLA Plans
API Keys
Pages
Forms
Lists
Assets
Materials
Emails
Time Sheets
Staff
Department Access:
Select All
Select None
Chennai IT Services
Maintenance
Sales
Support
Test
Test Department
Admin Notes: Internal notes viewable by all admins.
Create Role
Reset
Cancel

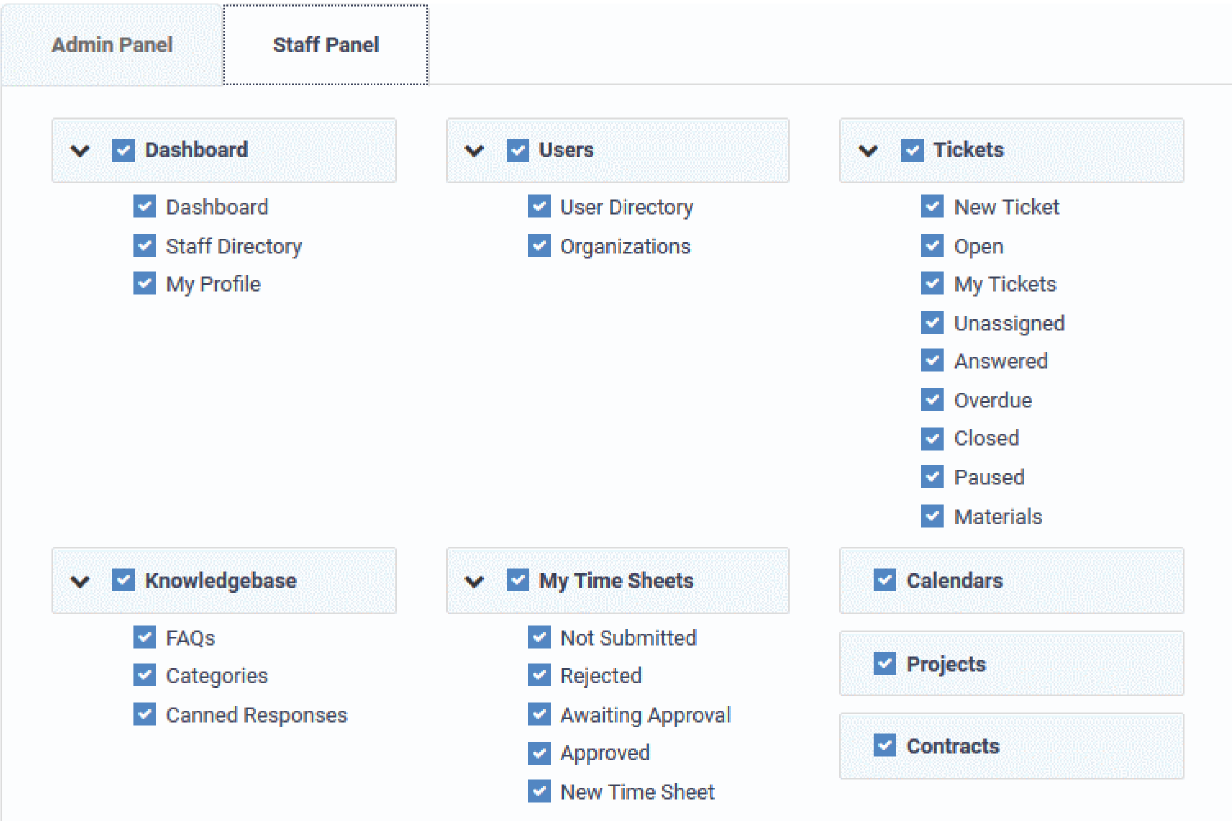
The ' Add New Role' screen contains the following fields and options:

Role Information

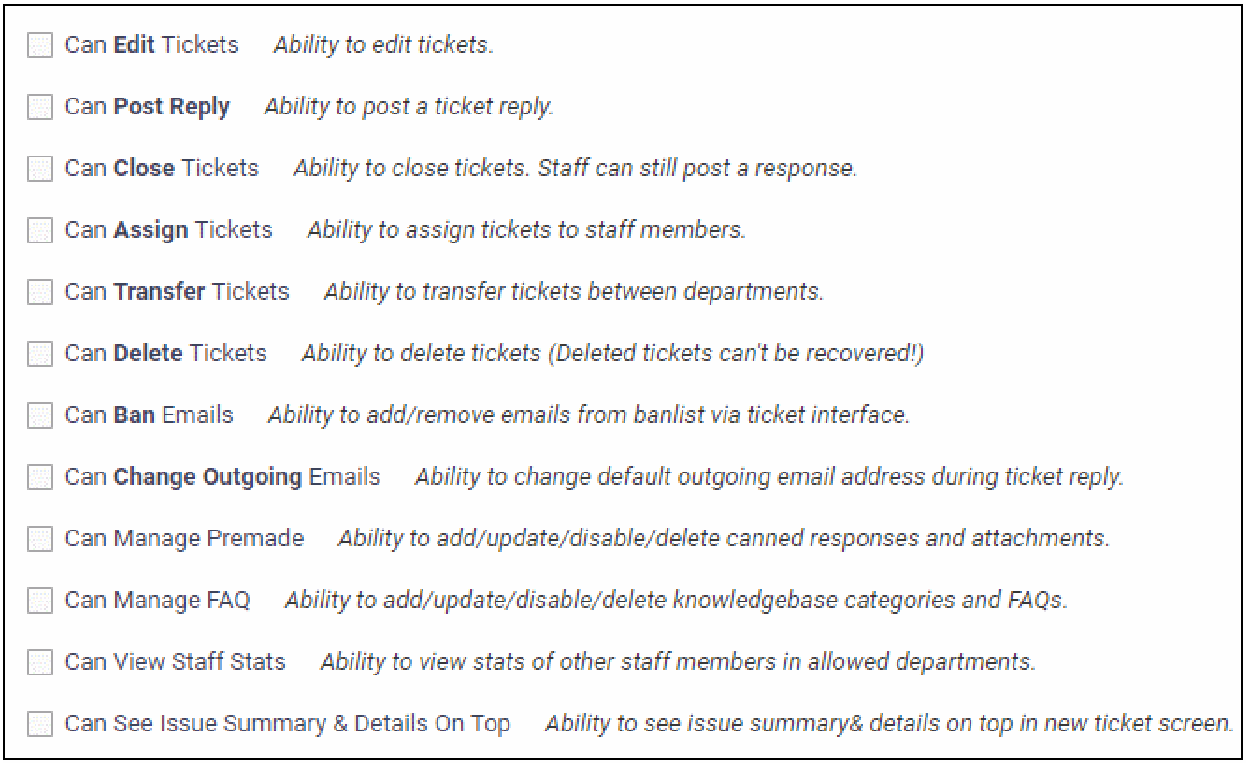
- **Name**: Enter a descriptive label for the role.
- **Status**: Select whether the members of a specific role should be active or locked. If disabled, the members of that role cannot login to Service Desk and will not receive department alert & notices.

Group Permissions

- 'Group Permissions' let you set access rights to features for the role. You can set permissions for both the admin and staff panels.
- Disabled features will not be visible to staff assigned to the role.



- The area directly underneath lets you choose the functions that role members can perform:



Department Access

- Select which departments can be accessed by role members. These departments are additional to the primary department to which the staff member belongs.

Admin Notes

- Create notes related to the role for the reference of other admins.
- Click the 'Create Role' button to save your new role.

To edit a role

- Click the role name in the list.
- The 'Update Role' screen will be displayed. The update procedure is same as explained above while **adding** a new role.

To delete a role

- Select the role that you want to delete from the list, click the 'Delete' button and confirm the deletion in the 'Confirmation' dialog. Please note roles inherited from C1 cannot be deleted. Roles that are assigned to staff members also cannot be deleted.

2.6.3 Departments

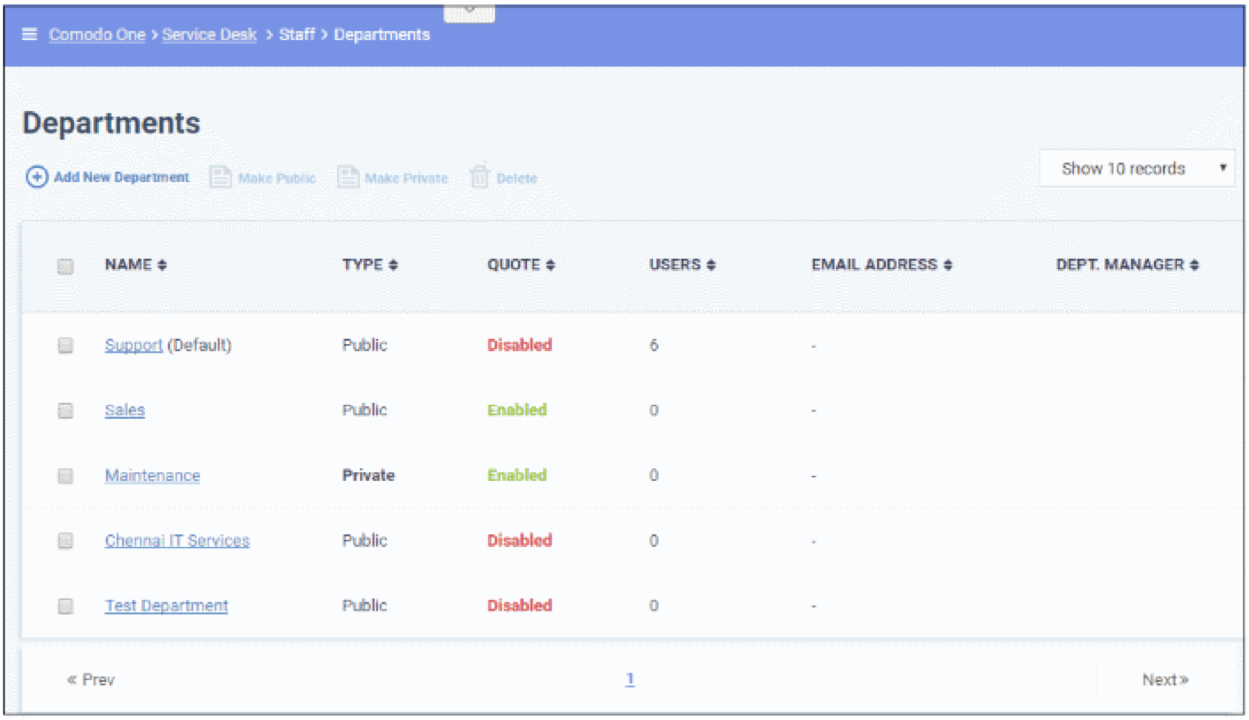
- Click 'Admin Panel' > 'Staff' > 'Departments'
- Service Desk ships with three default departments:
    - Maintenance
    - Support (default)
    - Sales
- All new staff are initially assigned to the default, 'Support' department. You can change the default department at anytime in 'System Settings & Preferences' ('Admin Panel' > 'Settings' > 'System')
    - Tickets will also be assigned to the default department if they are not already routed to a different department. Tickets can be re-routed by a ticket category, by incoming email settings, or by ticket

filter settings. See '**Ticket Settings and Options**' for more details.

- You can create additional departments based on your requirements. For example, a department called 'Computer Maintenance' could be populated with staff who have the required skill set to deal with such tickets. **Ticket Categories** and **Ticket Filters** can be configured to route new tickets to staff members in the appropriate department.

To manage departments

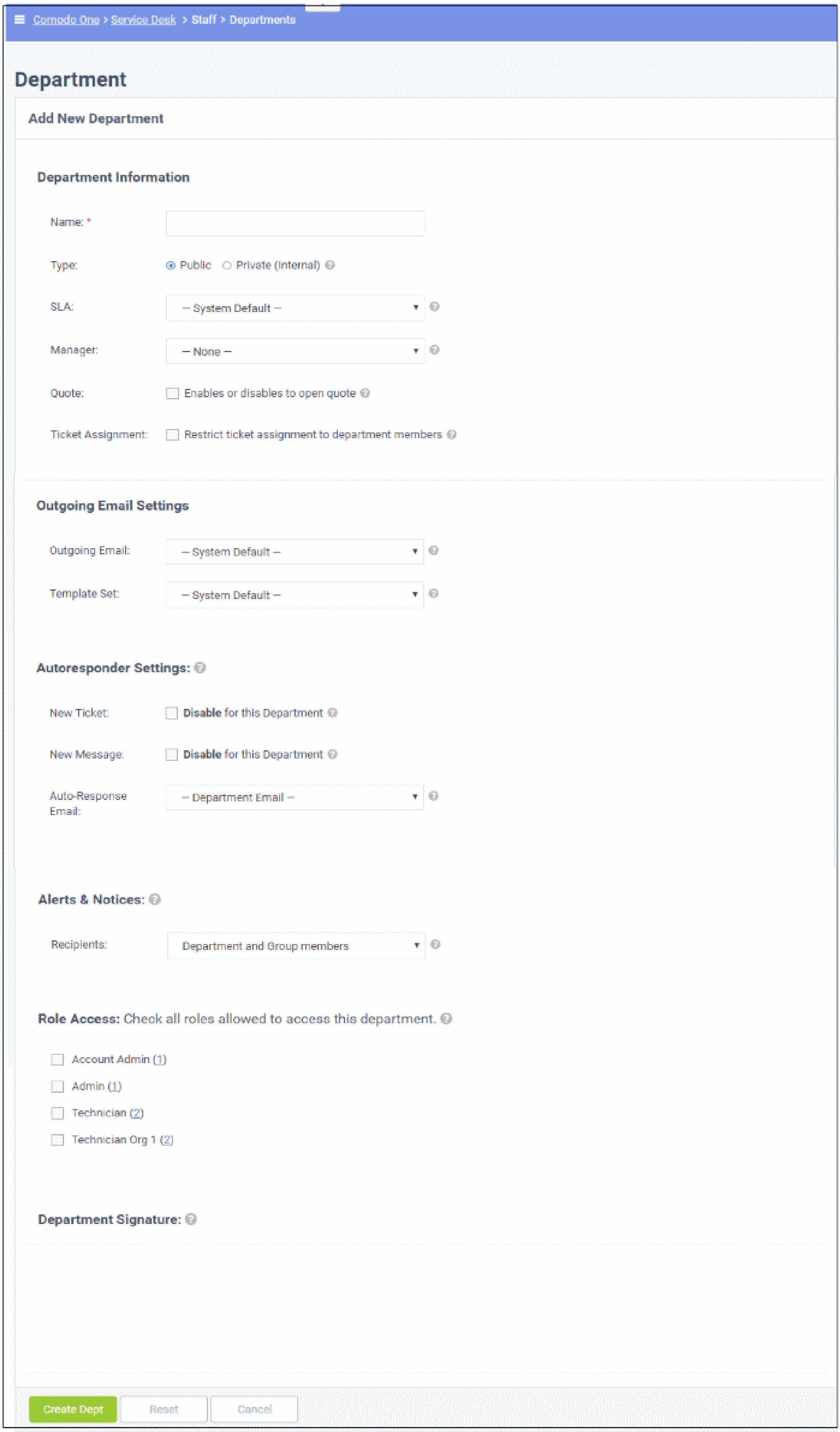
- Open the 'Admin Panel' (see last link on the left)
- Click 'Staff' > 'Departments' in the left-hand menu



- **Name**: The department label.
- **Type**: 'Public' or 'Private'. 'Users can submit tickets to a private department, but will not be able to view the department name. The department signature will not be included in email replies.
    - Click a department name to open its settings and switch its type between public and private.
    - The default department *must* be public. Go to 'Admin Panel' > 'Settings' > 'System' to set the default department.
- **Quote**: If enabled, staff can create price quotes for the cost of the ticket from within the ticket itself.
- **Users**: The number of staff that have access to the department. Click the number to view all entitled staff members.
- **Email Address**: The outgoing email address configured for the department.
- **Dept. Manager**: The staff member/admin assigned to manage the department. Click the name to open the 'Update Staff' screen.

To add a new department

- Open the 'Admin Panel' (see last link on the left)
- Click 'Staff' > 'Departments' in the left-hand menu
- Click the 'Add New Department' link:



Department Information

- **Name**: Enter a label for the department
- **Type:** 'Public' or 'Private'.

- 'Public' - Users can submit support tickets to public departments. Users can view the assigned department in the client portal.
- 'Private' - Users can submit support tickets to private departments, but cannot view the assigned department in the client portal. The department signature is not shown in email replies.

- **SLA:** Select the **Service Level Agreement (SLA)** for the tickets routed to this department.
- **Manager:** Select a manager for this department from the list of staff members. Managers have the right to unassign tickets and can be configured to receive special alerts. See **Configuring Alerts and Notices** for more details.
- **Quote**: Choose whether the department should be allowed to generate quotes for billable products and services from the Service Desk console. If enabled, staff members attending to a ticket assigned to the department can initiate a quote from the 'Ticket Details' interface. See **explanation of quote generation** in the section **Ticket Details** for more details.
- **Ticket Assignment:** If enabled, new tickets created can be assigned to staff members belonging to this department only and staff members of different groups having access to this department.

Outgoing Email Settings

- **Outgoing Email:** Select the outgoing email address that should be used for this department's replies to users in response to their tickets. See **Email Addresses** for details about how to add/edit email addresses.
- **Template Set:** Select the email template set that should be used for sending auto-responses and alerts & notices for tickets routed to this department. See **Email Templates** for details about how to add/edit email templates.

Autoresponder Settings

- **New Ticket:** If selected, auto-response emails on creation of new tickets and routed to this department is not sent. This setting overrides the global settings configured in **Autoresponder Settings** screen.
- **New Message:** If selected, auto-response emails to users to confirm newly posted messages for tickets in this department is not sent. This setting overrides the global settings configured in **Autoresponder Settings** screen.
- **Auto-Response Email:** Select the auto-response email address that should be used for this department. Refer to the section **Email Addresses** about how to add/edit email addresses.

Alerts & Notices

- **Recipients:** Select the recipients from the drop-down options who should receive the **configured alerts & notices** on ticket events.

Role Access

This section displays the list of staff roles and the number of members in each. Select the roles so that the staff with those roles can access the tickets assigned to the department, and to participate in departmental activity.

Department Signature

Enter the signature of the department that will be displayed in the ticket reply emails. The option to select this is available in the Staff Panel in ticket related screens.

- Click the 'Create Dept' button at the bottom of the screen for the settings done in the page to take effect.

To edit a department details

- Click on the department name in the list.

The 'Update Department' screen will be displayed. The update procedure is same as explained above while adding a new department.

To delete a department

- Select the department that you want to delete, click 'Delete' at the top and confirm the deletion in the 'Confirmation' dialog. Please note that the default department is public and therefore cannot be deleted.

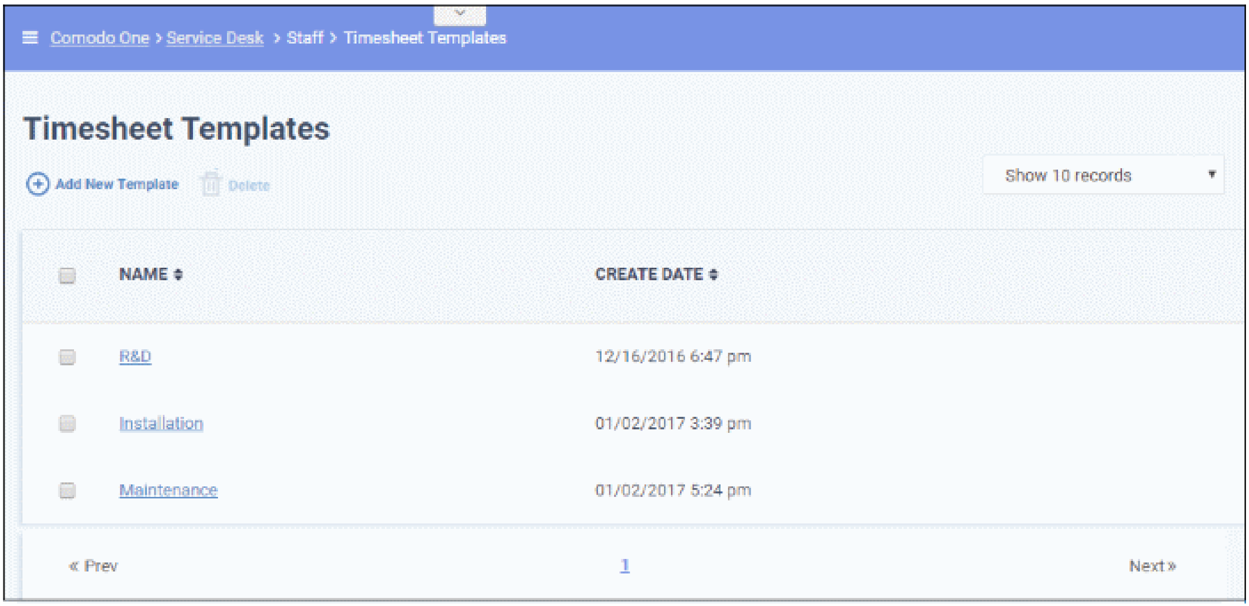
2.6.4 Time Sheet Templates

- Timesheets let staff record time spent on tickets and other tasks. See **Manage Staff Time Sheets** if you want background information on this item.
- Timesheet templates let you create sheets with activities tailored to your business.
- Once saved, staff can choose the template as the basis of a new time sheet in 'Staff Panel' > 'My Time Sheets'. Staff just need to enter the time spent on each activity.
- Admins can review, approve or reject submitted timesheets.

Manage Staff Time Sheets

The 'Timesheet Templates' interface allows administrators to create and manage timesheet templates. To open the interface:

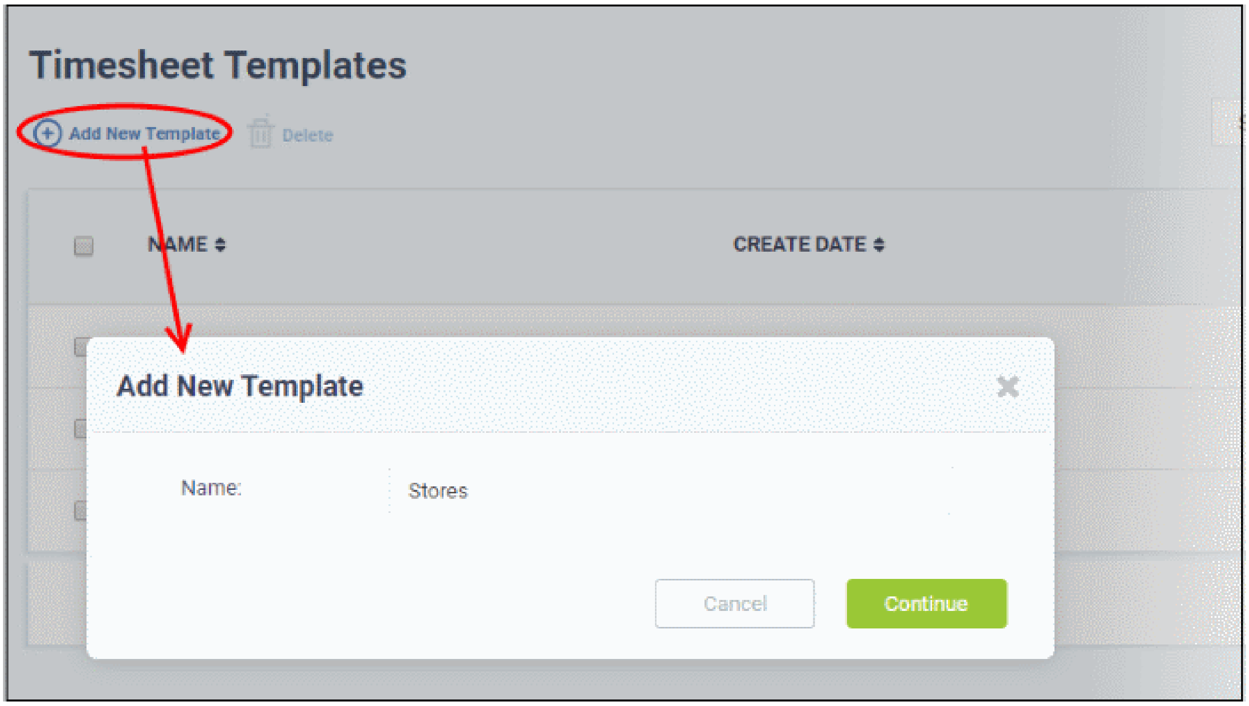
- Click 'Staff' on the left then 'Timesheet Templates' in the Admin Panel



- **Name**: The name of the timesheet template. Clicking on a template name will open the template activities screen. Template activities are the individual tasks included in a template.
- **Create Date**: Date on which the template was created.

To add a new timesheet template

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

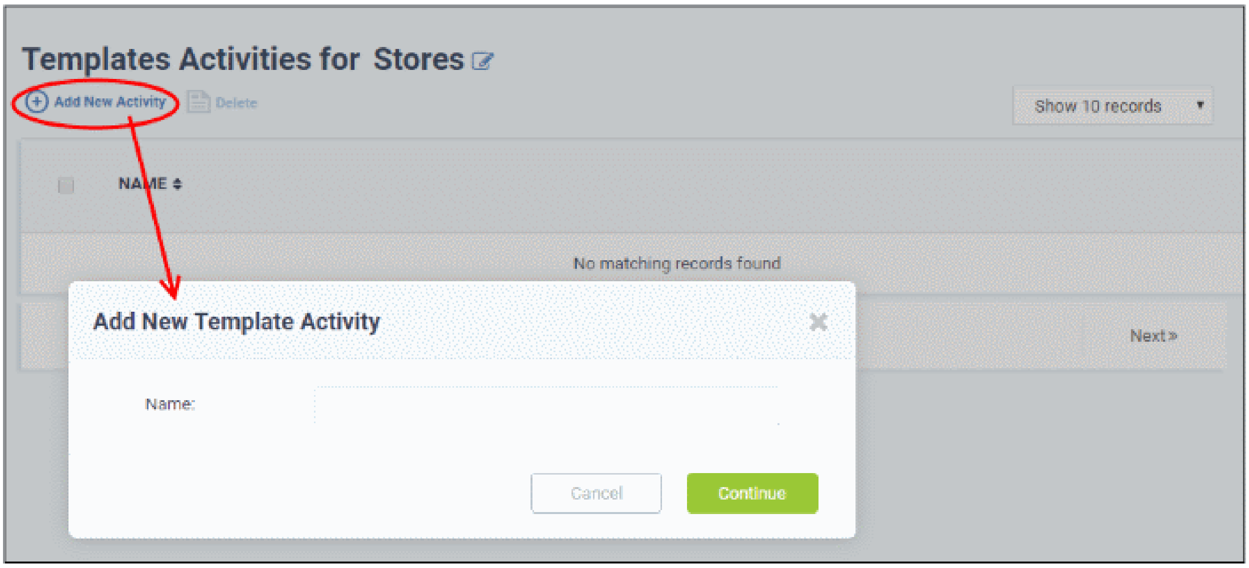


The 'Add New Template' dialog will appear. Each template name should describe a broad category of task type. For example, 'Server Installation' or 'System Maintenance'. You can define sub-tasks within the template as 'Activities' later.

- Enter a name for the new template shortly describing the task and click 'Continue'.

The next step is to add activities to the template. Each activity should be a constituent task of the template.

- Click 'Add New Activity' at the top of the timesheet template

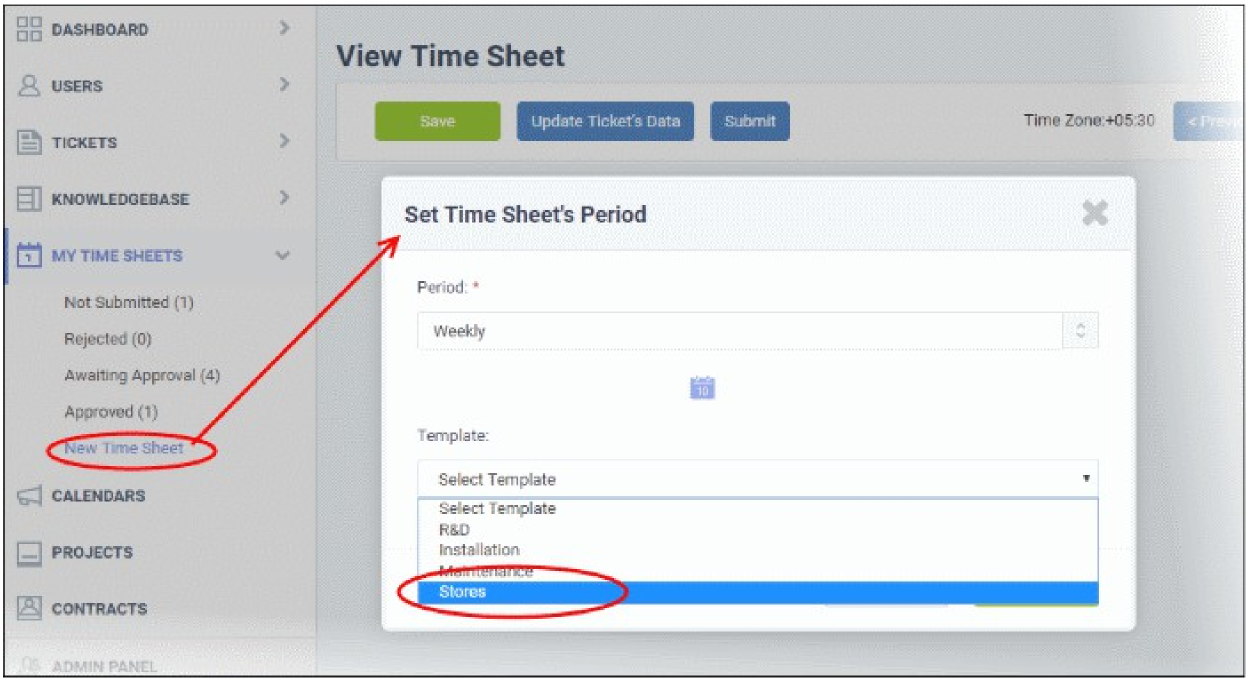


- Enter the name of the activity in the 'Add New Template Activity' dialog and click 'Continue'

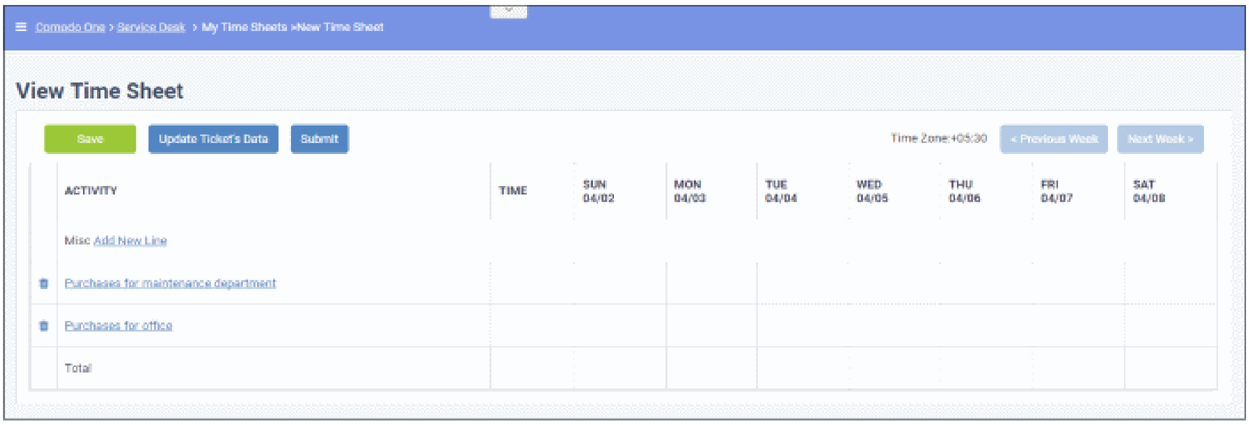
The Activity will be added to the list.

- Repeat the process to add more activities to the list
- To remove an activity, select it and click 'Delete' at the top

The template will be available for selection when a staff member creates a time sheet in the Staff Panel.



On selecting the template, the time sheet will be automatically populated with all activities in the template.

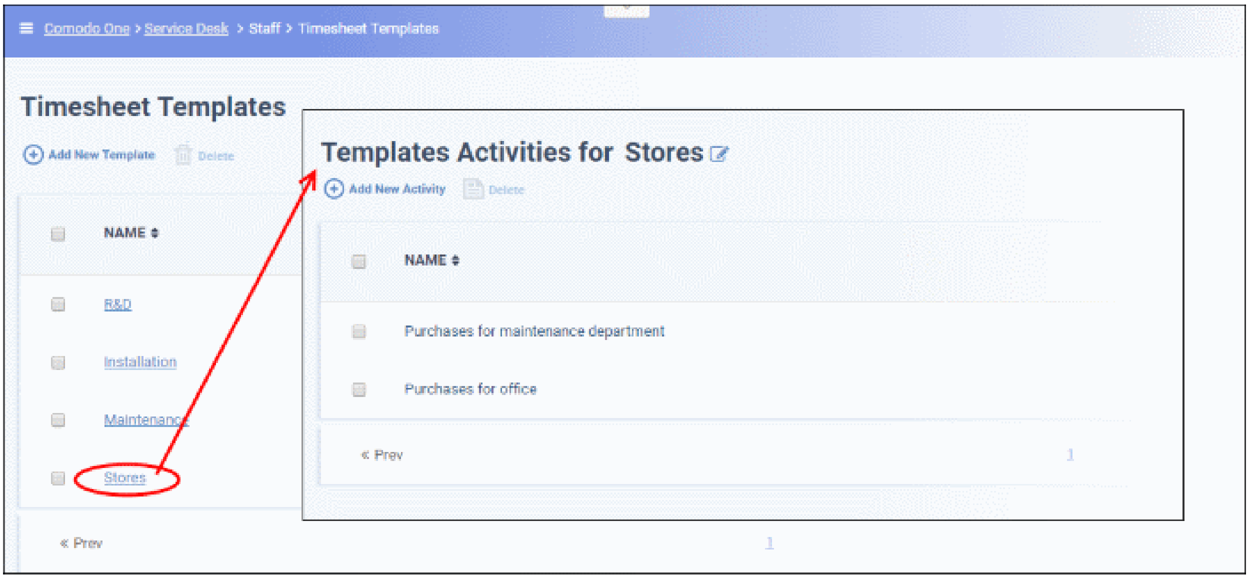


Staff can enter the time spent per day on each activity. If required, staff can add new activities to the time sheet by clicking 'Add New Line'. For more details on creating and managing time sheets, refer to the section **Managing Staff Time Sheets**.

To edit or update a time sheet template

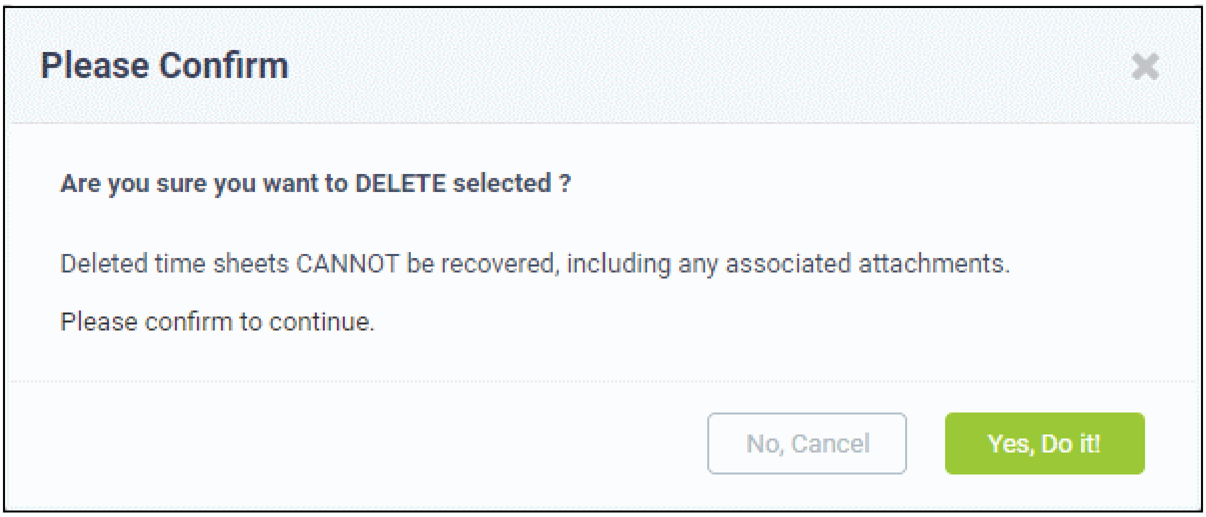
- Click the name of the template from the 'Timesheet Templates' interface

The 'Template Activities' interface for the selected template will open.



You can change the name of the template and add or remove activities. The process is similar to adding a new template as described **above**.

- To remove a template, select it and click 'Delete' at the top



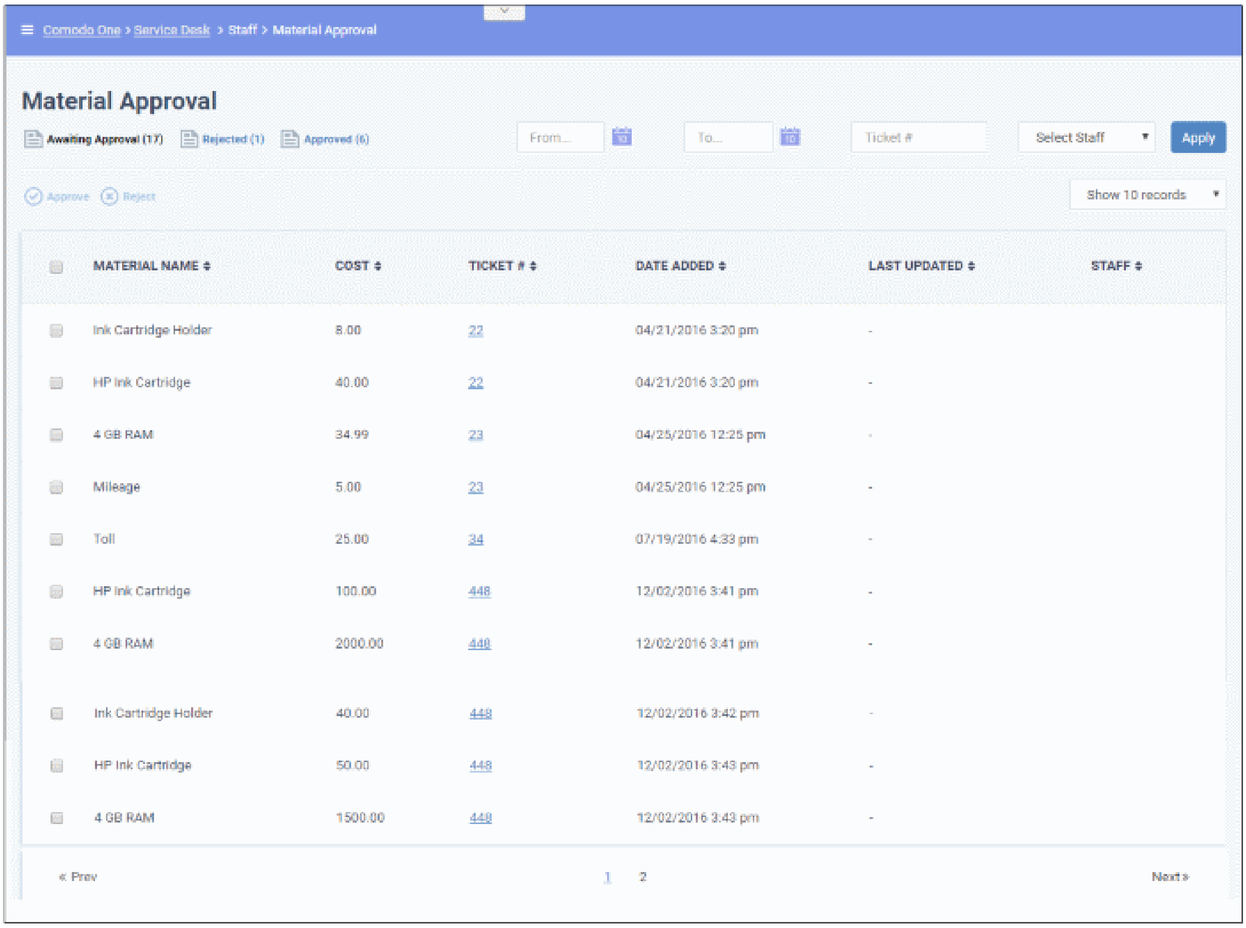
- Click 'Yes, Do it!' in the confirmation dialog.

2.6.5 Material Approval

- Staff can add a list of expenses and costs to a ticket which were incurred while resolving an issue.
- Material costs and expenses need to be approved by an administrator before they are included in a customer's bill.
- The 'Materials Approval' screen lets admins approve or reject costs added to tickets by staff.

To open the 'Materials Approval' interface

- Click 'Staff' on the left then 'Material Approval' in the Admin Panel



The links at the top allow you to filter material requests by:

- **Awaiting Approval** - Displays materials that were added by staff but have yet to be approved/rejected.
- **Rejected** - Displays materials that were rejected by administrators.
- **Approved** - Displays materials that have been approved by administrators.

Column Headers

- **Material name** - Displays the name of the material or expense added to the ticket. A 'Material' doesn't always have to be a physical item. It could also describe an expense item related to a ticket, such as highway toll fees.
- **Cost** - Material cost as entered by the staff member.
- **Ticket #** - Indicates the ticket number to which the material/expense has been added. Clicking the ticket number opens the ticket details page. See **Ticket Details** for more details.
- **Date Added** - Indicates the date and time at which the material/expense was added to the ticket. This column is only visible for materials in the 'Awaiting Approval' category.
- **Last Updated** - Indicates the date and time at which the material/expense details were last modified. This column is only visible for materials in the 'Awaiting Approval' category.
- **Staff** - Indicates the staff member who added the material to the ticket
- **Reason** - Displays the reason mentioned by the administrator for rejecting the material cost/expense. (Available only for 'Rejected' category)

To view, approve or reject a material/expense item

- Click the 'Awaiting Approval' link.
- Use the filter options to search for a specific item if required.
- Select an item or items using the check-boxes on the left.
- Click the 'Approve' or 'Reject' link at the top.

The status of the material/expense item will be updated immediately in the ticket details page of the respective ticket.

Search Options:

- Use the calendar icons beside the 'From' and 'To' date fields to search for materials/expenses added within a certain date range. Click 'Apply'.
- To search for materials/expenses added by a particular staff member, select the staff member from the 'Staff' drop-down (default = all). Click 'Apply'.
- To search for materials/expenses added to a specific ticket, enter the ticket number in the 'Ticket #' field. Click 'Apply'.
- You can use more than one filter at a time to search for specific items
- To display all results again, clear all fields / choose 'Select Staff' in the 'Staff' drop-down then click 'Apply'. Alternatively, click the category link at the top ('Awaiting Approval', 'Rejected' or 'Approved')

Sorting Options:

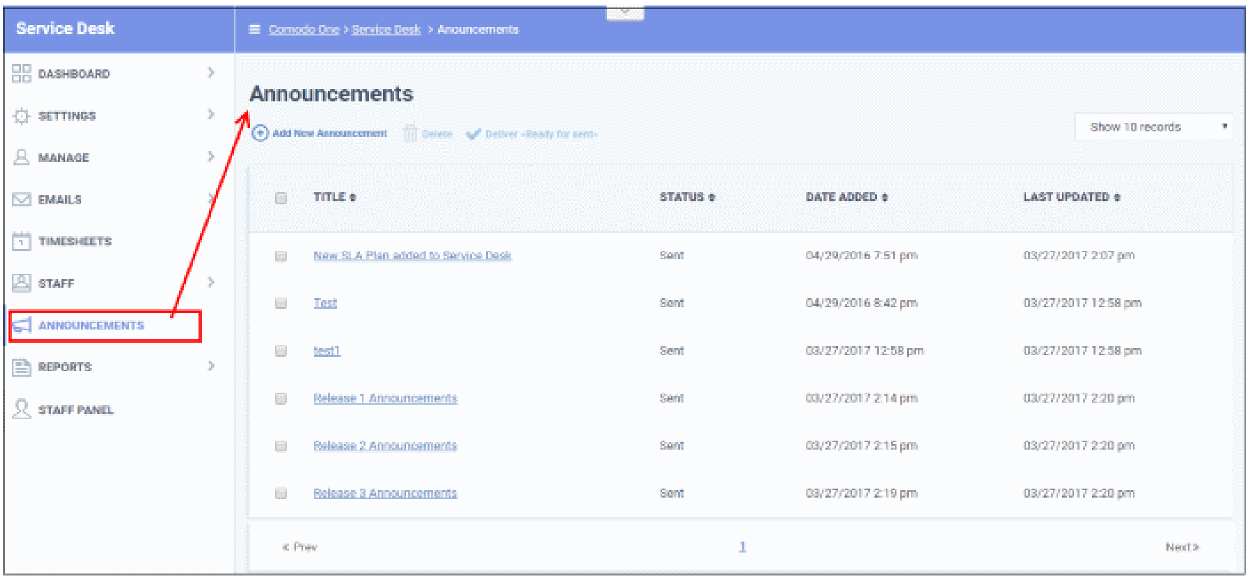
- Click a column header to sort items in ascending/descending order
- The 'Show records' drop-down on the right allows you to select the number of entries to be displayed per page. The options range from 10 records per page up to 100.

2.7 Manage Announcements

The 'Announcements' screen allows administrators to send email notifications containing important information to all staff members. Announcements can be about items such as changes to work flows, upcoming server maintenance, reminders to close tickets within the stipulated time and so on.

To open the Announcements screen:

- Make sure you are in the 'Admin Panel'
- Click 'Announcements' on the left:



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'.

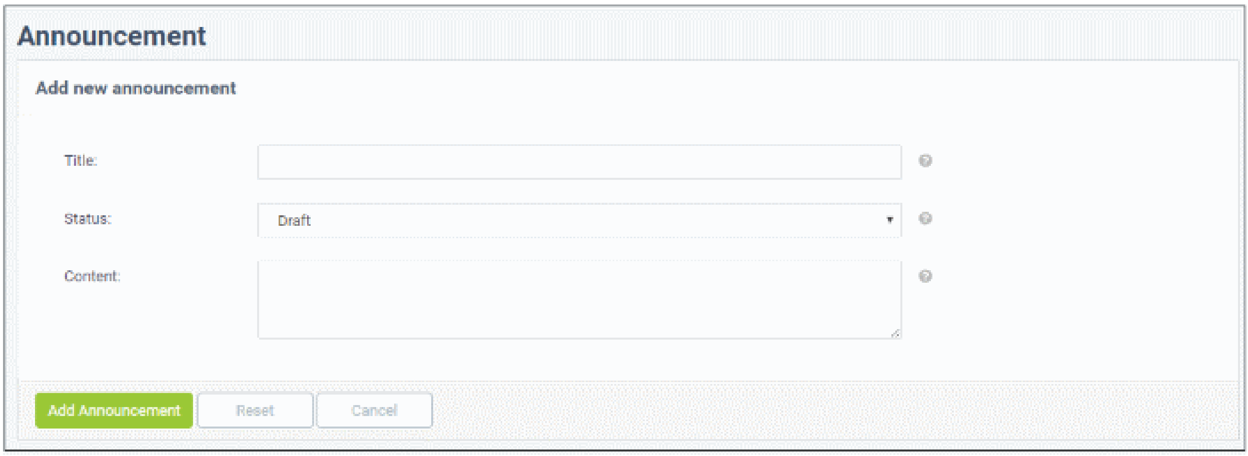
Column Headers

- **Title:** The subject of the announcement.
- **Status:** Indicates whether the announcement has been sent, is ready to send, is saved as a draft, or is in the process of being sent.
- **Date Added:** The date when the announcement was added to C1 Service Desk.
- **Last Updated:** The date and time when the announcement was added/edited.

To add a new announcement

- Click 'Add New Announcement' at the top

The' Add New Announcement' screen will be displayed:

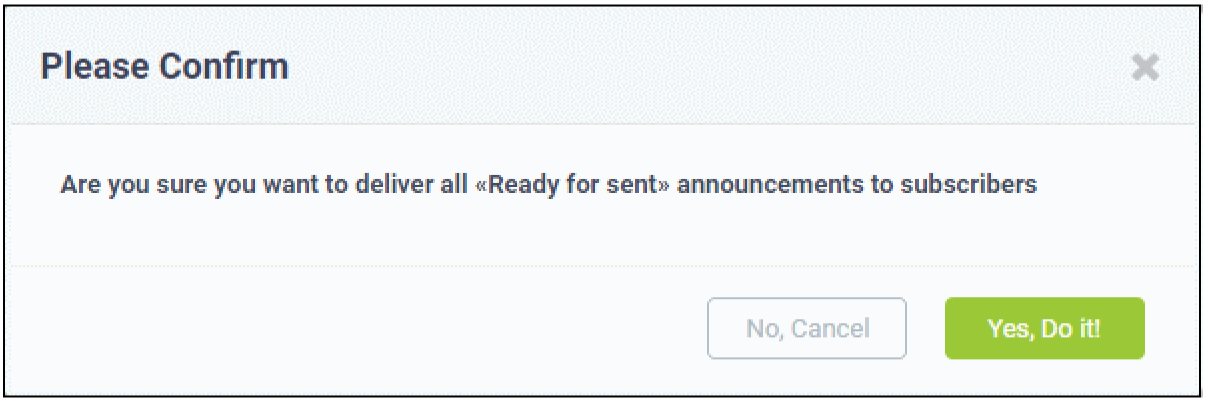


- **Title:** Enter the title for the announcement
- **Status:** Select the status of the announcement. The options available are:
  - **Draft:** Announcements that are incomplete and can be saved as draft. These cannot be sent to staff members.
  - **Ready for sent:** Announcements that are ready for sending to staff members.
- **Content:** Enter the message you wish to send to staff members.

Clicking the 'Reset' button clears the 'Title' and 'Content' fields. Click the 'Add Announcement' button to add the announcement in the list.

- To send the announcements to the staff members, click 'Deliver <Ready for sent>'.

A confirmation screen will be displayed:



- Click 'Yes, Do it' to send the announcement(s). The Status column for the announcement(s) will show 'In Progress' then 'Sent' when complete.

To edit an announcement

- Click the announcement name in the list.

The 'Add new announcement' screen will be displayed. Edit the announcement title and/or content and click the 'Update Announcement' button.

To delete an announcement

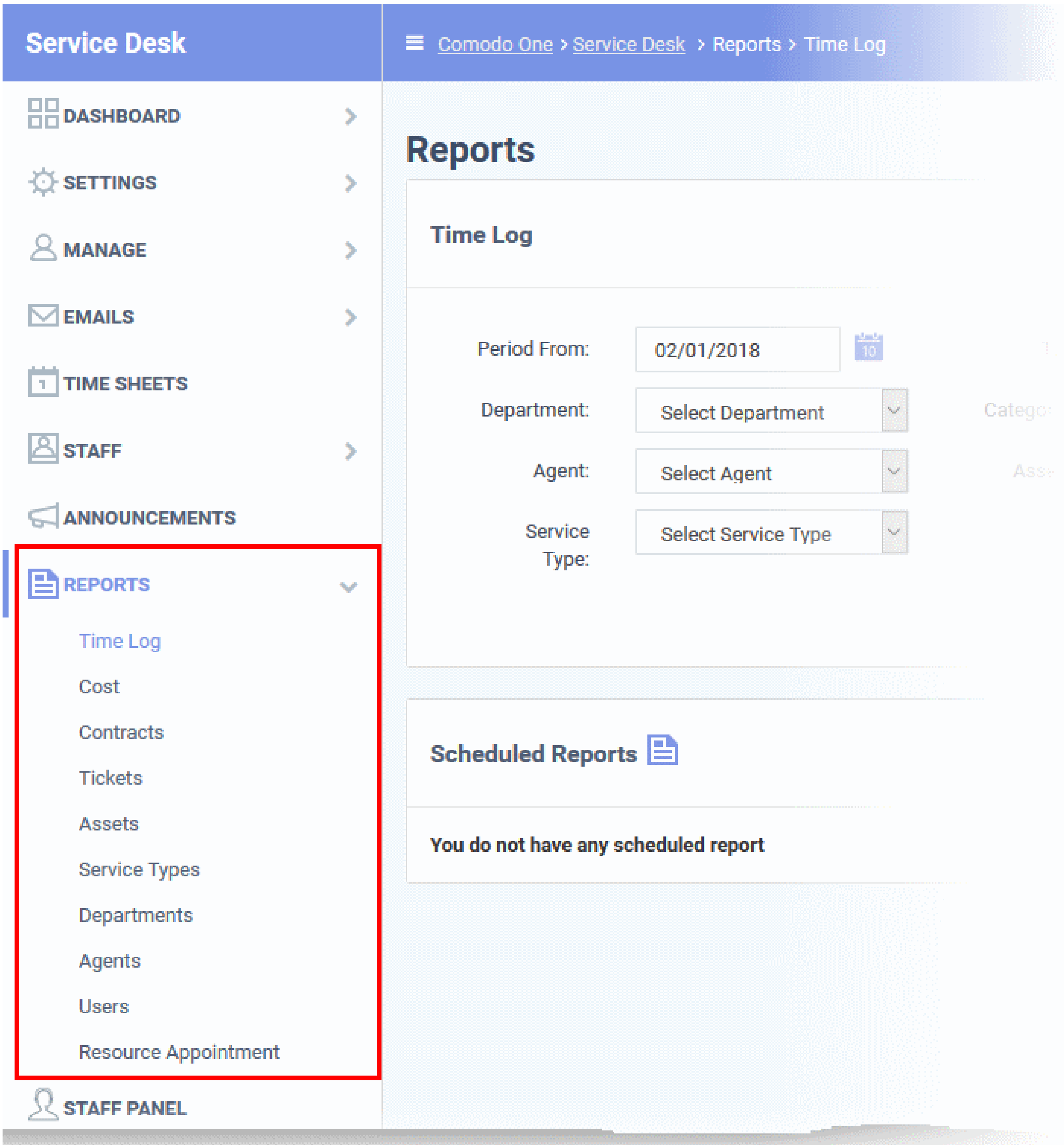
- Select the announcement that you want to delete, click 'Delete' at the top of the screen and confirm the deletion in the 'Confirmation' dialog.

2.8 Generate Reports

- Service Desk can generate comprehensive and highly informative reports for all ticket activities.
- These include billing reports, department reports, time-log reports, asset reports, agent reports (admin/staff members) and user reports.
- You can also schedule reports to be automatically generated at set times and sent to selected recipients.

To open the 'Reports' screen:

- Make sure you are in the 'Admin' panel
- Click 'Reports' on the left:



Report Types

- **Time Log:** Information on ticket activities such as ticket ID, to which department it was assigned, ticket category chosen, name of the assigned staff, asset type and the status of the ticket.
- **Tickets:** Complete information on ticket activities such as created time, billable time, time spent on a ticket by an admin/staff member and so on.
- **Assets:** Information on asset category selected for tickets and its statuses such as the number of tickets that are open, closed, assigned, overdue, billable time, spent time, material cost and billable time cost.
- **Service Types**: A report on the time spent working on a particular service type, and the charges applied for that work. Service types are 'Remote', 'Telephone' and 'On-Site'. The report also details the specific assets that have been worked on.
- **Departments**: Ticket information by departments such as number of tickets that are open, closed, assigned overdue, billable time, spent time, material cost and billable time cost.
- **Agents:** Ticket information by agents (admin/staff member) such as number of tickets assigned to them, closed, overdue, paused, open, billable time, spent time, material cost and billable time cost.

- **Users:** Ticket information by end users such as number of tickets raised by them, tickets that are open, overdue, closed, assigned, paused, billable time, spent time, material cost and billable time cost.
- **Resource Appointment:** Information about appointments and amount of time spent for each appointment.

See '**Scheduled Reports**' to know how to configure and schedule periodical report generation.

2.8.1 Time Log Reports

- Make sure you are in the 'Admin Panel' (see the last link on the left)
- Click 'Reports' > 'Time Log'
- 'Time Log' reports provide information on ticket activities during selected periods.
- Reports include the date/time of ticket creation, ticket ID, the ticket assignee, the asset type that the ticket concerns, and the status of the ticket.
- Reports can be exported to PDF and CSV formats.

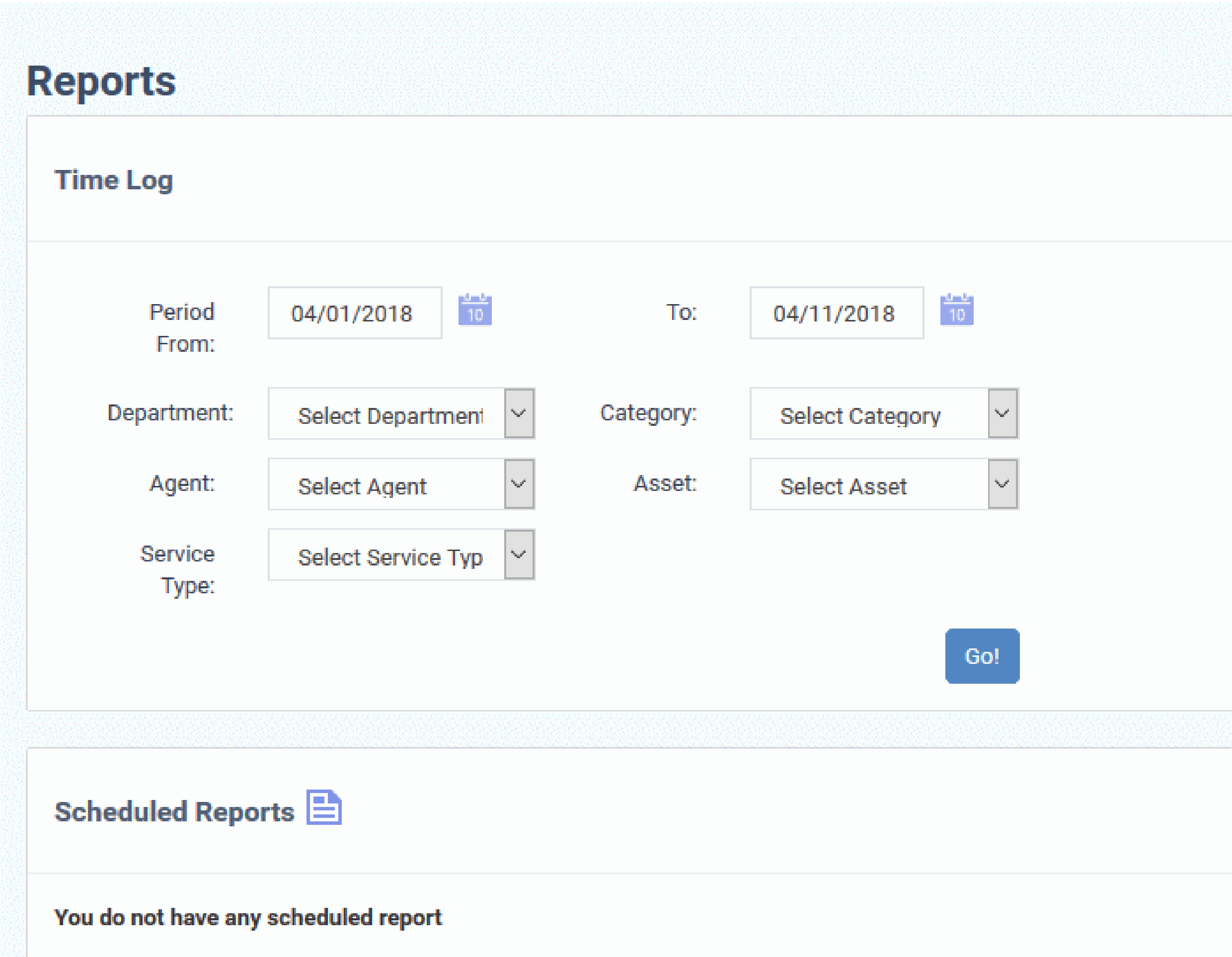
Tip: You can also view Service Desk logs in the Comodo One portal.

- Click 'Management' at the top of the C1 interface and select 'Audit Logs'

For more help with this, see the online help page **https://help.comodo.com/topic-289-1-716-12456-View-Audit-Logs.html**.

To generate a time log report

- Open the 'Admin' Panel
- Click 'Reports' on the left then 'Time Log'



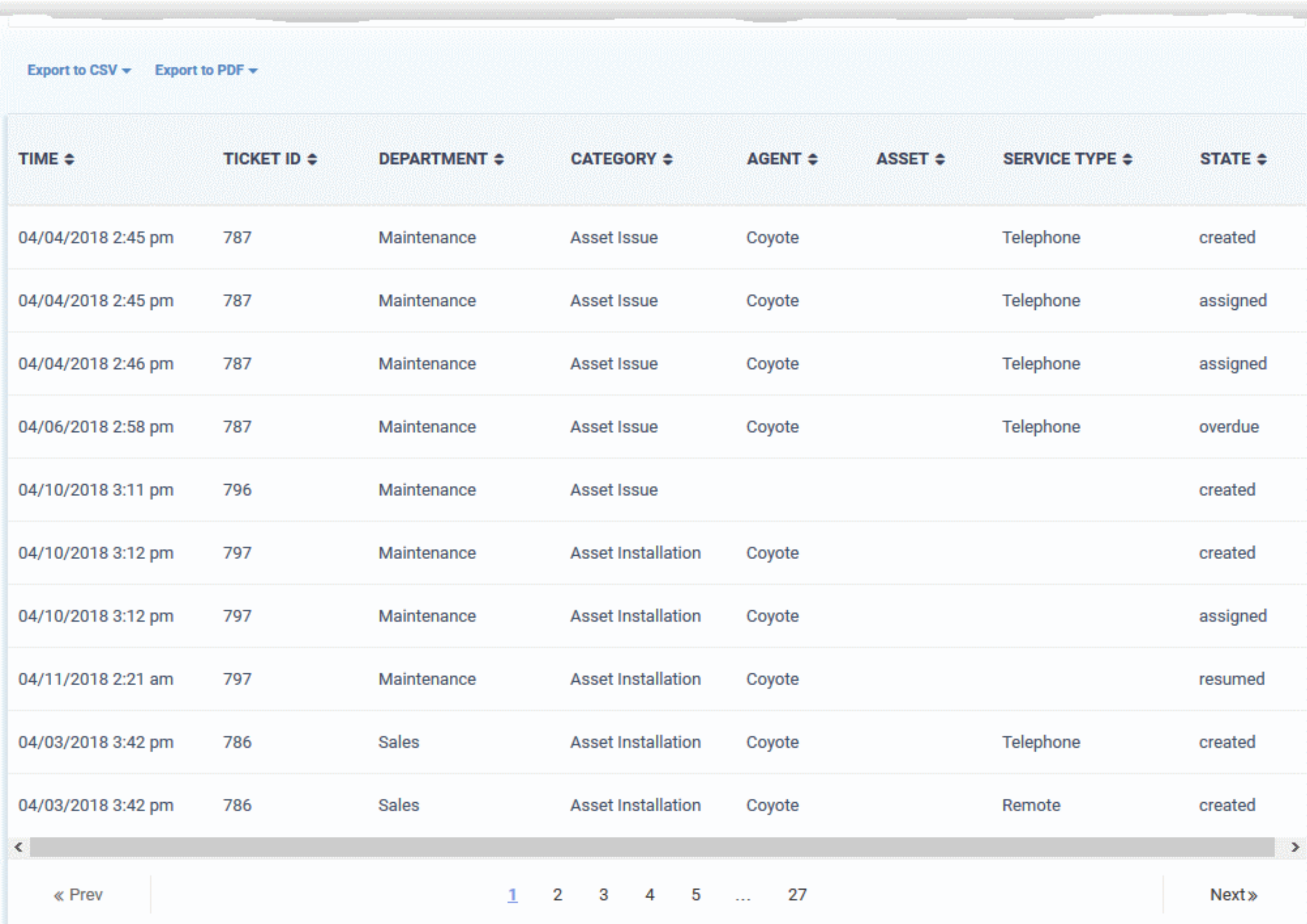
The default time period for reports is from the first day of the current month to the current date. You can select a different period by selecting or entering the dates in the 'From' and 'To' date range fields. The drop down filters allow you to filter reports by department/Queue, ticket category, staff and asset. You can clear a filter by leaving choosing the default 'Select...' option in the drop down. You can also schedule periodical report generation and configure the recipients to whom it should be sent.

Filter Options

- **Period From**: Select the start date of the report period.
- **To**: Select the end date of the report period.
- **Department**: Filter by the department to which the ticket is assigned. Manage departments in 'Admin Panel' > 'Staff' > 'Departments'.
- **Category**: Filter by the type of issue that was worked on. Manage ticket categories in 'Admin Panel' > 'Manage' > 'Ticket Categories'.
- **Agent**: Filter by the staff member to whom the ticket is assigned. Manage staff in 'Admin Panel' > 'Staff' > 'Staff Members'.
- **Asset**: Filter by the type of item that was worked on. Manage assets in 'Admin Panel' > 'Manage' > 'Assets'.
- **Service Type** - Filter logs by the kind of support service that was provided. Types = 'Remote', 'On-Site' and 'Telephone'.

- Click the 'Go!' button to generate the report for the selected period and filters.

If no filters are selected, the full report for all ticket activities within the period will be generated and displayed.



Export to CSV ▾ Export to PDF ▾

TIME	TICKET ID	DEPARTMENT	CATEGORY	AGENT	ASSET	SERVICE TYPE	STATE
04/04/2018 2:45 pm	787	Maintenance	Asset Issue	Coyote		Telephone	created
04/04/2018 2:45 pm	787	Maintenance	Asset Issue	Coyote		Telephone	assigned
04/04/2018 2:46 pm	787	Maintenance	Asset Issue	Coyote		Telephone	assigned
04/06/2018 2:58 pm	787	Maintenance	Asset Issue	Coyote		Telephone	overdue
04/10/2018 3:11 pm	796	Maintenance	Asset Issue				created
04/10/2018 3:12 pm	797	Maintenance	Asset Installation	Coyote			created
04/10/2018 3:12 pm	797	Maintenance	Asset Installation	Coyote			assigned
04/11/2018 2:21 am	797	Maintenance	Asset Installation	Coyote			resumed
04/03/2018 3:42 pm	786	Sales	Asset Installation	Coyote		Telephone	created
04/03/2018 3:42 pm	786	Sales	Asset Installation	Coyote		Remote	created

« Prev 1 2 3 4 5 ... 27 Next »

Time Log Report - Column Descriptions

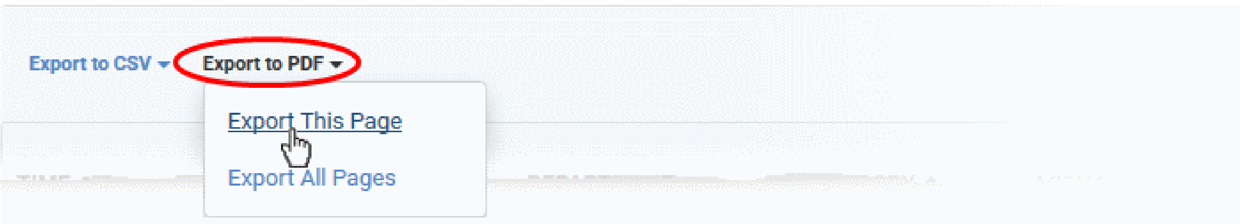
Column Header	Description
Time	The date and time of the ticket activity.
Ticket ID	The identification number assigned to the ticket.
Department	Department to which the ticket was assigned.
Category	The ticket category that was selected while creating the ticket.
Agent	Staff member to whom the ticket was assigned.
Asset	The hardware, software or service that is the subject of the ticket. User's specify the asset type when creating the ticket.
Service Type	The kind of service rendered during the service session. The possible values are: • Onsite • Remote • Telephone
State	The activity on the ticket. The possible activities are: • Created - The ticket was created. • Assigned - The ticket was assigned to a staff. • Paused - The ticket was paused. • Resumed - The ticket activity was resumed. • Closed - The ticket was closed. • Reopened - The ticket was reopened. • Overdue - The ticket was not closed within the stipulated time. • Warning - Warnings flagged for the ticket per the SLA plan. • Transferred - The ticket was transferred to another staff member.

- Click any column header to sort items in ascending/descending order of entries in that column.
- Each page of the report contains ten log entries
- You can navigate to successive pages using the 'Prev', 'Next' and page number options at the bottom.

Download the Report

You can download the report in PDF and CSV formats.

- Click 'Export to PDF' and/or 'Export to CSV' at the top of the table to download the report in the respective format:



- Select 'Export this page' to download the csv or pdf file containing only the currently displayed page
- Select 'Export all pages ' to download the csv or pdf file containing the full report

Scheduled Reports

You can schedule that reports are periodically generated and sent to selected staff/agents. Click the icon beside 'Scheduled Reports' to start the process. See '**Scheduling Periodical Report Generation**' for more details.

2.8.2 Tickets Reports

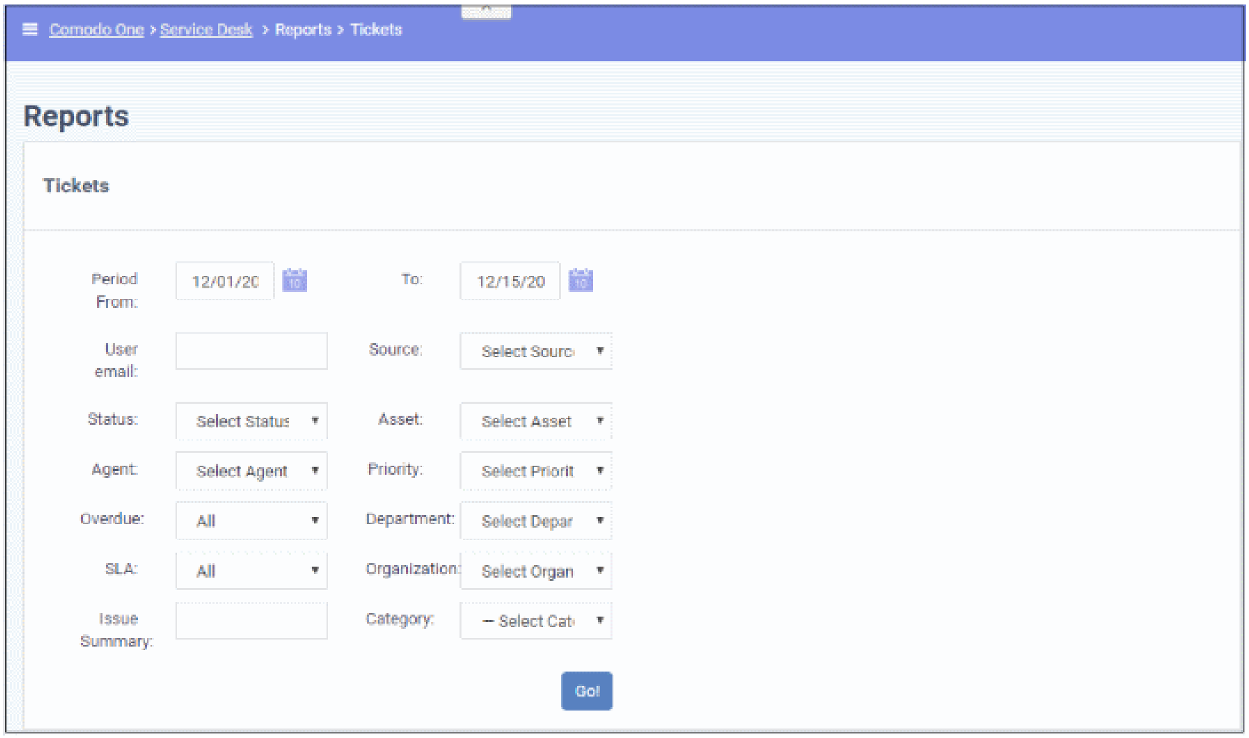
The 'Tickets' report provides comprehensive information on all ticket activities for the selected period. Information includes ticket ID, the date and time of ticket creation, user's name and email address and the staff member assigned to the ticket. Reports can be exported to PDF and CSV formats.

Tip: You can also view logs on ticket activities from the Comodo One portal.

- Click 'Management' at the top of the C1 interface and select 'Audit Logs'

For more help with this, see the online help page **https://help.comodo.com/topic-289-1-716-12456-View-Audit-Logs.html**.

- To open the 'Tickets' report screen, click 'Reports' on the left from the 'Admin Panel' then 'Tickets'.



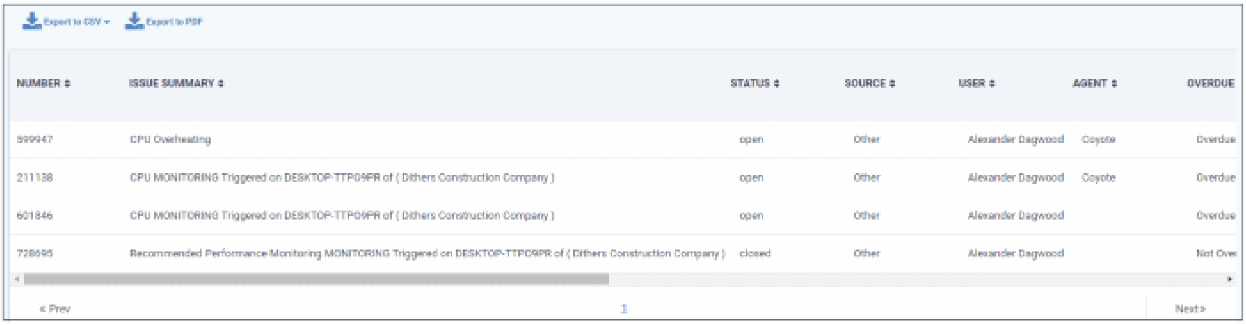
- The default period for reports is from the first day of the present month to the current date. You can select a different period by selecting or entering the dates in the 'From' and 'To' date range fields.
- You can also filter reports by staff, asset, priority and more.
- Click the 'Go!' button to generate a report for the selected period.

Filter Options

- **Period From:** Select the start date of the report period.
- **To:** Select the end date of the report period.
- **User email:** Filter the report by user. Select the user's email address in the field or leave the field blank to include tickets for all users.
- **Source:** Filter the report by ticket source. Leave as 'Select Source' to include tickets from all sources in the report.

- **Status:** Filter the report by status. Leave as 'Select Status' to include tickets for all statuses in the report.
- **Asset:** Filter the report by asset. Leave as 'Select Asset' to include tickets for all assets in the report.
- **Agent:** Filter the report by staff/agent. Leave as 'Select Agent' to include tickets for all agents in the report.
- **Priority:** Filter the report by ticket priority. Leave as 'Select Priority' to include tickets for all priorities in the report.
- **Overdue:** Filter the report by overdue status. Leave as 'All' to include tickets for all overdue statuses in the report.
- **Department:** Filter the report by department. Leave as 'Select Department' to include tickets assigned to all departments.
- **SLA:** Filter the report by SLA plan. Leave as 'All' to include tickets for all SLA plans in the report.
- **Organization:** Filter the report by organization. Leave as 'Select Organization' to include tickets for all organizations in the account.
- **Issue Summary:** Filter the report by issue summary. Enter the issue summary partly or in full. Leave the field blank to include tickets for all issue summaries.
- **Category**: Filter the report by ticket category. Leave as 'Select Category' to include tickets for all ticket categories.

- Click the 'Go!' button to generate the report for the selected period and filters. If no filters are selected, then the full report for all ticket activities will be generated and displayed.



Sorting the items

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

Column Headers

- **Number:** The identification number (ID) of the ticket.
- **Issue Summary**: The summary of the issue as entered during its creation.
- **Status:** The current status of the ticket, whether open or closed.
- **Source:** The source through which the ticket was created.
- **User**: The name of the user with email ID, who created the ticket or on behalf of whom, the ticket as created by a staff member.
- **Agent:** The name of the staff member that was assigned the ticket.
- **Overdue:** Indicates whether the ticket is open beyond the stipulated closing time.
- **Asset:** The asset category selected for the ticket.
- **Priority:** Indicates the priority of the ticket.
- **Organization:** The name of the organization for which the ticket was raised.
- **Dept**: The name of the department to which ticket was assigned.

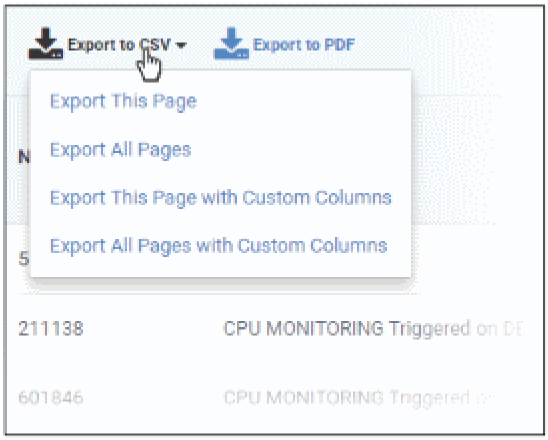
- **SLA:** The SLA plan selected for the ticket.
- **Created:** The date and time the ticket was created.
- **Closed:** The date and time the ticket was closed.
- **Billable Time**: The billable time spent on resolving the issues(s) mentioned in the ticket by staff member.
- **Spent Time:** Actual time spent for resolving the ticket.
- **Materials:** The total cost of any materials used to resolve the ticket
- **Billable Time Cost:** The bill cost for attending to the ticket.
- **Category:** The ticket category selected for the ticket.

Downloading the Report

- Click 'Export to PDF' or 'Export to CSV' to generate the report.

You have the option to include custom fields, if any, for a ticket report.

- Click 'Export to CSV'



  - Export this page - Create a report for the tickets in the current page
  - Export all pages - Create a report for tickets in all pages
  - Export this page with custom columns - Create a report for the tickets in the current page with custom fields, if any. See '**Forms**' and '**Custom Lists**' for info about adding custom fields.
  - Export all pages with custom columns - Create a report for the tickets in all pages with custom fields, if any. See '**Forms**' and '**Custom Lists**' for info about adding custom fields.

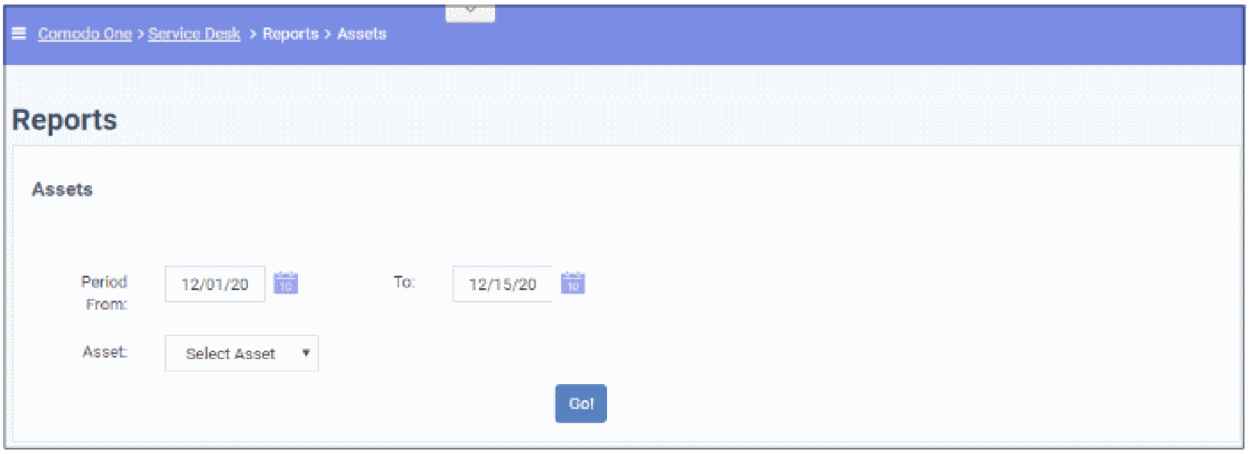
Scheduled Reports

- Allows you to schedule automatic reports and configure recipients.
- Click the icon beside 'Scheduled Reports' to start the process. See '**Scheduled Reports**' for more details.

2.8.3 Assets Reports

- The 'Assets' report shows the number of tickets that are open, closed, assigned and overdue for an asset category. Asset categories include items such as 'Printers', 'Routers', 'Servers' etc.
- This can help you see which asset categories are in most demand and provide insight into where support infrastructure could be strengthened.
- Asset information also includes time spent, billable time, material cost and billable time cost.
- The 'Asset' report can be generated for all asset categories or for a single asset category. Reports can be exported to PDF and CSV formats.

- Click 'Reports' > 'Assets' in the admin panel to open the asset report interface.



By default, the period for the report will be from first day of the present month to the current date. You can select a different period by selecting or entering the dates in the 'From' and 'To' date range fields. You can also use the filter option to generate the report asset category wise. If you click the 'Go!' button without using the asset filter option, then the 'Assets' report will be generated for all the asset categories. You can also schedule periodical report generation and configure the recipients to whom it should be sent.

Filter Options

- **Period From**: Select/enter the start date of the report period.
- **To**: Select/enter the end date of the report period.
- **Asset**: Choose the asset category for which the report has to be generated. Leave as 'Select Asset' to include all asset categories in the report.

- Click the 'Go!' button to generate the report for the selected period and filter.

If an asset is not selected, then the full report for all asset categories will be generated for the time period and displayed.

ASSET	OPEN	CLOSED	ASSIGNED	OVERDUE	ALL TICKETS	BILLABLE TIME	SPENT TIME	MATERIALS($)	BILLABLE TIME COST
server	0	2	2	0	2	0 hrs 36 min	0 hrs 31 min	25	60.00
workstation	3	1	2	3	4	0 hrs 37 min	0 hrs 35 min	65	49.33
printer	6	0	5	6	6	1 hrs 52 min	1 hrs 43 min	20	121.32
mobile	0	0	0	0	0	0 hrs 0 min	0 hrs 0 min	0	0
router	0	1	1	0	1	24 hrs 8 min	24 hrs 6 min	275	2654.67
other	0	0	0	0	0	0 hrs 0 min	0 hrs 0 min	0	0

« Prev 1 Next »

Sorting the items

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

Column Headers

- **Asset:** The name of the asset category.
- **Open:** Number of tickets that are open for the asset category.
- **Closed:** Number of tickets that are closed for the asset category.
- **Assigned:** Number of tickets that are assigned the asset category.

- **Overdue:** Number of tickets that are assigned the asset category and not closed within the stipulated time.
- **All tickets:** Total number of tickets that are assigned the asset category, that is, the sum of open and closed tickets for it.
- **Billable Time:** Time spent on tickets for the asset category which can be charged to the customer.
- **Spent Time:** Total time spent resolving tickets for the asset category.
- **Materials:** The total cost of materials used in tickets for the asset category.
- **Billable Time Cost:** The total charge for time listed in the 'Billable Time' column.

Download the Report

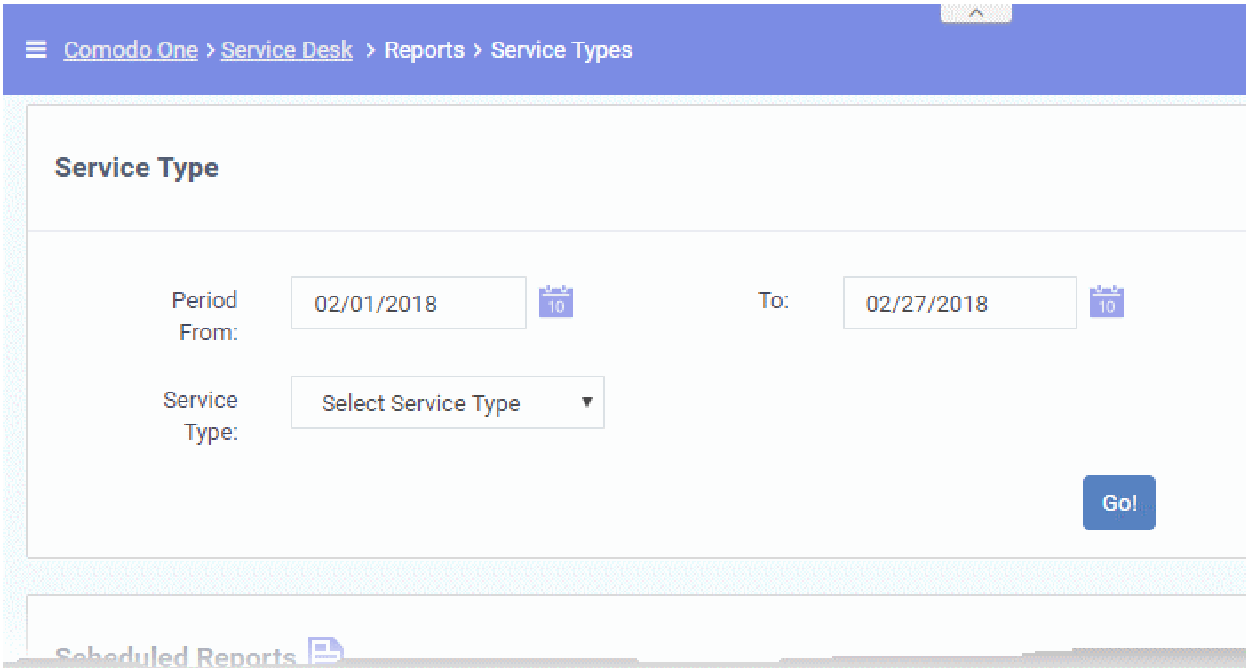
- You can download reports in PDF and CSV formats.
- Click 'Export to PDF' and/or 'Export to CSV' at the top of the table to obtain reports.

Scheduled Reports

- Click the icon beside 'Scheduled Reports' to schedule a report and configure recipients. See '**Scheduled Reports**' for more details.

2.8.4 Service Types Reports

- The 'Service Types' report shows the number of service sessions involving the selected service type, total time spent, billable time spent for the service type, cost calculated and so on.
- This can help you see which service types are in most demand and provide insight into where support infrastructure could be strengthened and set pricing in future.
- The 'Service Types' report can be generated for all service types or for a single service type. Reports can be exported to PDF and CSV formats.
- Click 'Reports' > 'Service Types' in the admin panel to open the 'Service Types' report interface.



By default, the period for the report will be from first day of the present month to the current date. You can select a different period by selecting or entering the dates in the 'From' and 'To' date range fields. You can also use the filter option to generate the report service type wise. If you click the 'Go!' button without using the 'Service Type' filter option, then the 'Service Type' report will be generated for all service types. You can also schedule periodical report generation and configure the recipients to whom it should be sent.

Filter Options

- **Period From**: Select/enter the start date of the report period.
- **To**: Select/enter the end date of the report period.
- **Contract**: Choose the service type for which the report has to be generated. Leave as 'Select Service Type" to include all service types in the report.

- Click the 'Go!' button to generate the report for the selected period and service type(s).

If a service type is not selected, then the full report for all service types will be generated for the time period and displayed.

SERVICE TYPES	THREADS	TICKETS	TOTAL TIME SPENT	BILLABLE TIME	BILLABLE TIME COST($)	SERVER	WORKSTATION	PRINTER	MOBILE	ROUTER	OTHER	SERVER1
Remote	6	1	0 hrs 0 min	0 hrs 0 min	0.5	1	-	-	-	-	-	-
Telephone	-	0	0 hrs 0 min	0 hrs 0 min	-	-	-	-	-	-	-	-
Onsite	9	1	3 hrs 12 min	3 hrs 12 min	320.47	1	-	-	-	-	-	-

« Prev 1 Next»

- Click 'Service Type' column header to sort items in ascending/descending order.

Column Headers

- **Service types**: The name of the service type .Possible values are:
  - Remote,
  - Onsite
  - Telephone
- **Threads**: The total number of service sessions involving the service type within the report period.
- **Tickets**: The total number of attended tickets involving the service type within the report period.
- **Total Time Spent**: The total time spent on the service type.
- **Billable Time** : The net chargeable time spent on the service type excluding the pre-paid hours defined in the service contracts bound to the customers.
- **Billable Time Cost**: The total charge calculated for the billable time, based on the hourly rates defined in the contracts and charging plans associated with them.
- **Asset Types** (Server, Workstation etc.): A breakup of time spent providing the type of service on different asset types within the report period.

Download the Report

- You can download reports in PDF and CSV formats.
- Click 'Export to PDF' and/or 'Export to CSV' at the top of the table to obtain reports.

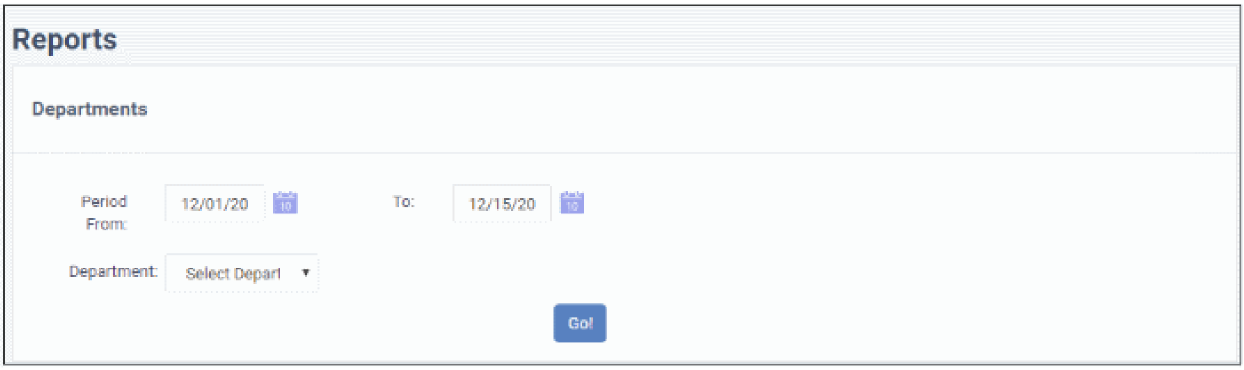
Scheduled Reports

- Click the icon beside 'Scheduled Reports' to schedule a report and configure recipients. See '**Scheduled Reports**' for more details.

2.8.5 Department Ticket Reports

- The 'Departments' report shows the status of all tickets at the department level.
- This includes the number of open and closed tickets per department, the number of those tickets that have been assigned to staff members and the number of overdue tickets.
- Report also includes time spent, billable time and material cost for the department.

- The 'Departments' report can be generated for all departments or for a single department. The generated report can also be saved as PDF and CSV formats.
- Click 'Reports' > 'Departments' in the 'Admin Panel' to open this screen



By default, the period for the report will be from first day of the present month to the current date. You can select a different period by selecting or entering the dates in the 'From' and 'To' date range fields. You can generate reports for specific departments by using the 'Department' drop-down filter. If you click the 'Go!' button without using the department filter option, then the 'Department' report will be generated for all the departments. You can also schedule periodical report generation and configure the recipients to whom it should be sent.

Filter Options

- **Period From**: Select the start date of the report period.
- **To**: Select the end date of the report period.
- **Department**: Choose the department for which the report has to be generated. Leave as 'Select Department' to include tickets assigned to all departments in the report.

- Click the 'Go!' button to generate the report for the selected period and filter.

If a department is not selected, then the full report for all departments will be generated for the selected period and displayed.

DEPARTMENT ⇕	OPEN	CLOSED	ASSIGNED	OVERDUE	ALL TICKETS	BILLABLE TIME	SPENT TIME	MATERIALS($)	BILLABLE TIME COST
Maintenance	0	0	0	0	0	0 hrs 0 min	0 hrs 0 min	0	0
Sales	0	0	0	0	0	0 hrs 0 min	0 hrs 0 min	0	0
Support	9	4	10	9	13	27 hrs 13 min	26 hrs 57 min	385	2885.32

Sorting the items

- Click the 'Department' column header to sorts the items in ascending/descending order.

Column Headers

- **Department:** The name of the department.
- **Open:** Number of tickets assigned to the department and in open status.
- **Closed:** Number of tickets assigned to the department and have been closed.
- **Assigned:** Total number of tickets are assigned to the department.
- **Overdue:** Number of tickets assigned to the department and not closed within the stipulated time.
- **All tickets:** Total number of tickets that are assigned to the department (sum of open and closed tickets).

- **Billable Time:** Time spent on tickets for the department which can be charged to customers.
- **Spent Time:** Total time spent resolving tickets for the department.
- **Materials:** The total cost of materials used in tickets for the department.
- **Billable Time Cost:** The total charge for time listed in the 'Billable Time' column.

Download the Report

- You can download reports in PDF and CSV formats.
- Click 'Export to PDF' and/or 'Export to CSV' at the top of the table to obtain reports.

Scheduled Reports

- Allows you to schedule automatic reports and configure recipients.
- Click the icon beside 'Scheduled Reports' to start the process. See '**Scheduled Reports**' for more details.

2.8.6 Agent Reports

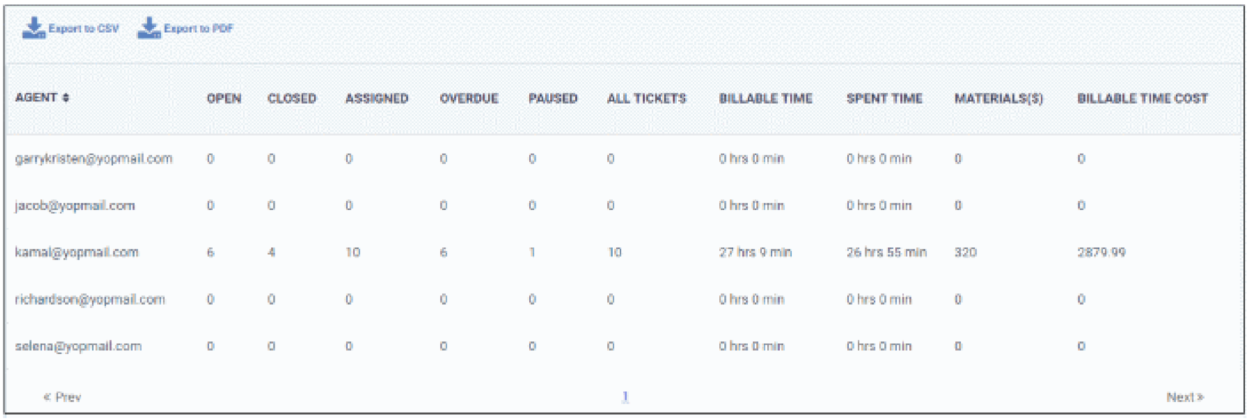
- The 'Agents' report provides information on the numbers of tickets that are open, closed, assigned, paused and overdue for a selected staff member.
- Report also includes information about billable time, spent time, material cost and billable time cost which helps for better productivity analysis.
- The 'Agents' report can be generated for all staff members or for a single member. Reports can be exported to PDF and CSV formats.
- Click 'Reports' > 'Agents' in the 'Admin Panel' to open the interface.

- The default time period for reports is from the first day of the current month to today's date.
- You can select a different period by selecting or entering the dates in the 'From' and 'To' date range fields.
- You can also use the filters to generate reports on individual staff.
- If you click the 'Go!' button without using the agent filter option, then the 'Agent' report will be generated for all staff members.
- You can also schedule automatic reports and configure recipients

Filter Options

- **Period From**: Select the start date of the report period.
- **To**: Select the end date of the report period.
- **Agent**: Choose the staff member for whom the report has to be generated. Leave as 'Select Agent' to generate report for all staff members.

- Click the 'Go!' button to generate the report for the selected period and filter.



Export to CSV   Export to PDF

AGENT ⇕	OPEN	CLOSED	ASSIGNED	OVERDUE	PAUSED	ALL TICKETS	BILLABLE TIME	SPENT TIME	MATERIALS($)	BILLABLE TIME COST
garrykristen@yopmail.com	0	0	0	0	0	0	0 hrs 0 min	0 hrs 0 min	0	0
jacob@yopmail.com	0	0	0	0	0	0	0 hrs 0 min	0 hrs 0 min	0	0
kamal@yopmail.com	6	4	10	6	1	10	27 hrs 9 min	26 hrs 55 min	320	2879.99
richardson@yopmail.com	0	0	0	0	0	0	0 hrs 0 min	0 hrs 0 min	0	0
selena@yopmail.com	0	0	0	0	0	0	0 hrs 0 min	0 hrs 0 min	0	0

« Prev   1   Next »

Sorting the items

- Click the 'Agent' column header to sort the items in ascending/descending order.

Column Headers

- **Agent**: The name of the staff member.
- **Open**: Number of tickets assigned to a staff member and in open state.
- **Closed**: Number of tickets assigned to the staff member that have been closed.
- **Assigned**: Total number of tickets assigned to the staff member.
- **Overdue**: Number of tickets assigned to the staff member and not closed within the stipulated time.
- **Paused**: Number of tickets paused temporarily by the staff member.
- **All tickets**: Total number of tickets assigned to the staff member (sum of open and closed tickets).
- **Billable Time:** Time spent on tickets by the staff member which can be charged to the customer
- **Spent Time:** Total time spent resolving tickets for the by the staff member.
- **Materials:** The total cost of materials used in tickets worked on by staff members.
- **Billable Time Cost:** The total charge for time listed in the 'Billable Time' column.

Download the Report

- You can download reports in PDF and CSV formats.
- Click 'Export to PDF' and/or 'Export to CSV' at the top of the table to obtain reports.

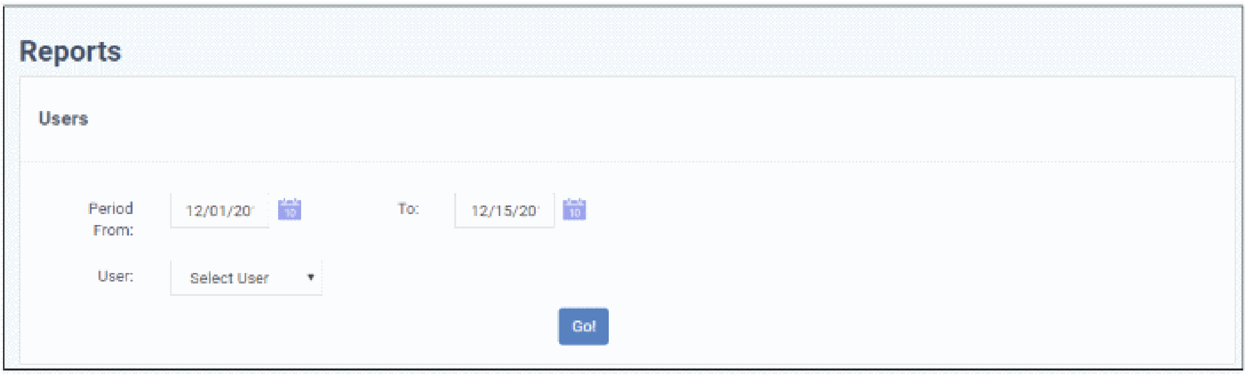
Scheduled Reports

- Allows you to schedule automatic reports and configure recipients.
- Click the icon beside 'Scheduled Reports' to start the process. See '**Scheduled Reports**' for more details.

2.8.7 Users Reports

- The 'Users' report provides information on tickets created by/created on behalf of registered and guest users.
- The report also includes details about the billable time, spent time, material cost and billable time cost for the users' tickets.
- The 'Users' report can be generated for all users or for a single user. Reports can be exported to PDF and CSV formats.

- Click 'Reports' > 'Users' in the admin panel to open this interface.



- The default time period for reports is from the first day of the present month to current date.
- You can select a different period by selecting or entering the dates in the 'From' and 'To' date range fields.
- You can also use the filters to generate reports for specific users.
- If you click the 'Go!' button without a filter then the report will be generated for all users.
- You can also schedule automatic reports and configure recipients.

Filter Options

  - **Period From**: Select/enter the start date of the report period.
  - **To**: Select/enter the end date of the report period.
  - **User**: Choose the user for whom the report has t be generated. Leave as 'Select User' to generate report for all the users.
- Click the 'Go!' button to generate the report for the selected period and filter.

If the user filter drop-down is left as 'Select User', then all users will included in the report.

Export to CSV Export to PDF

USER	OPEN	OVERDUE	CLOSED	ASSIGNED	PAUSED	ALL TICKETS	BILLABLE TIME	SPENT TIME	MATERIALS($)	BILLABLE TIME COST
selena@yopmail.com	1	1	1	1	0	2	24 hrs 12 min	24 hrs 9 min	275	2660.00
john@yopmail.com	5	5	2	6	1	7	0 hrs 45 min	0 hrs 42 min	65	56.99
sathish.pachaiyappan@comodo.com	2	2	1	3	0	3	2 hrs 16 min	2 hrs 5 min	45	168.33
kamal@yopmail.com	1	1	0	0	0	1	0 hrs 0 min	0 hrs 0 min	0	0.00

« Prev 1 Next »

Sorting the items

- Click the 'User' column header to sort the items in ascending or descending order.

Column Headers

- **User**: The name of the registered or guest user.
- **Open**: Number of tickets created by the user and yet to be resolved.
- **Overdue**: Number of tickets created by/for the user that have not been closed within the stipulated time.
- **Closed**: Number of tickets that are created by/for the user and closed by the assigned staff member.
- **Assigned**: Total number of tickets created by/for the user that are assigned to a staff member.
- **Paused**: Number of tickets that are paused temporarily by the assigned staff member.
- **All tickets**: Total number of tickets that were created by/for the user (sum of open and closed tickets).

- **Billable Time:** Time spent on tickets for the selected users which can be charged to the customer.
- **Spent Time:** Total time spent resolving tickets for the selected users.
- **Materials:** The total cost of materials used in tickets for the selected users.
- **Billable Time Cost:** The total charge for time listed in the 'Billable Time' column.

Download the Report

- You can download reports in PDF and CSV formats.
- Click 'Export to PDF' and/or 'Export to CSV' at the top of the table to obtain reports.

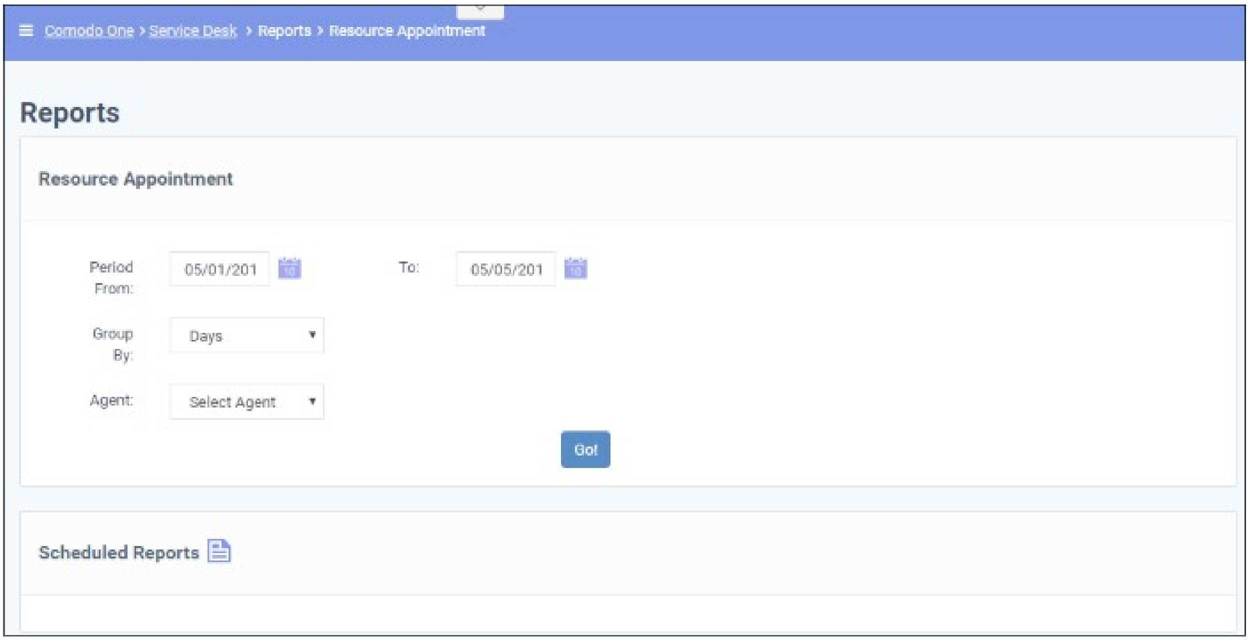
Scheduled Reports

- Allows you to schedule automatic reports and configure recipients.
- Click the icon beside 'Scheduled Reports' to start the process. See '**Scheduled Reports**' for more details.

2.8.8 Resource Appointment Reports

The 'Resource Appointment' report provides information about staff appointments fixed via **calendars**, including shared calendars. The report provides an overview of upcoming commitments to scheduled tasks by staff members.

- To open the 'Resource Appointment' report screen, click 'Reports' on the left from the 'Admin Panel' then 'Resource Appointment'.



The default time period for reports is from the first day of the present month to current date. You can select a different period by selecting or entering the dates in the 'From' and 'To' date range fields. You can also use the filter option to generate reports for specific appointments. If you click the 'Go!' button without using the user filter option, then the 'Resource Appointment' report will be generated for all the appointments. You can also schedule periodical report generation and configure the recipients to whom it should be sent.

Filter Options

- **Period From**: Select the start date of the report period.
- **To**: Select the end date of the report period.
- **Group By:** Select how the report should be grouped, that is, by days, weeks, months, quarters or by years.

- **Agent**: Filter the report by staff member. Leave as 'Select Agent' to include resource appointments related to all staff in the report.
- Click the 'Go!' button to generate the report for the selected period and filter. The following example shows report by months.

RESOURCE NAME	WORK (H)	APR 2017	MAY 2017
Coyote MPerformanceBackupConnectionMaintenanceadde...	6.5 6 6 8 7 15	6.5 6 6 8 7 0	15

« << Prev 1 « Next >>

Download the Report

- You can download reports in PDF and CSV formats.
- Click 'Export to PDF' and/or 'Export to CSV' at the top of the table to obtain reports.

Scheduled Reports

- Allows you to schedule automatic reports and configure recipients.
- Click the icon beside 'Scheduled Reports' to start the process. See '**Scheduled Reports**' for more details.

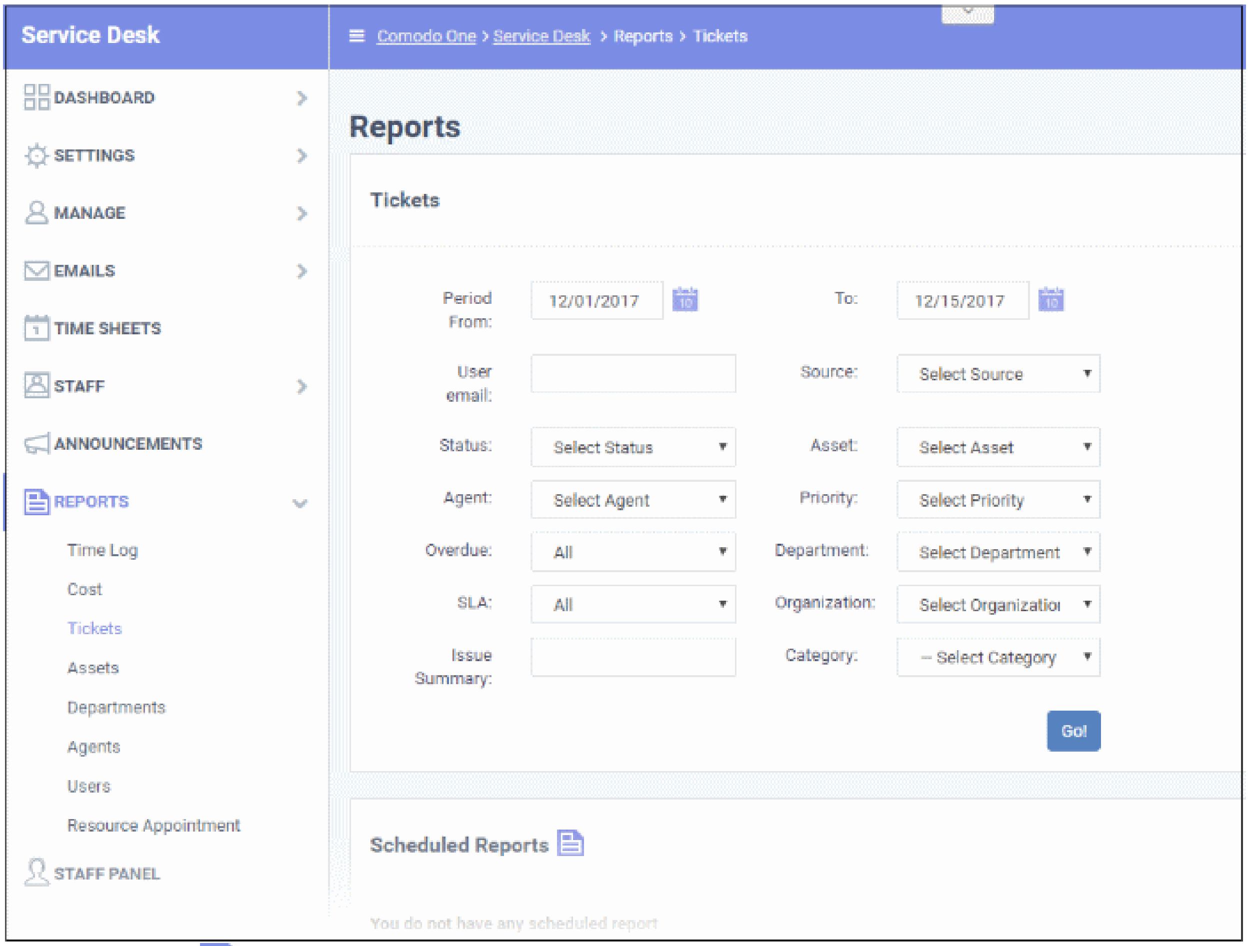
2.8.9 Scheduled Reports

- You can configure Service Desk to automatically generate and send reports to specific staff members at regular time-intervals.
- Reports that can be scheduled include **Time Log**, **Cost**, **Tickets**, **Assets**, **Departments**, **Agents**, **Users** and **Resource Appointments**.
- The scheduling process is explained below (filters for specific report types may vary).

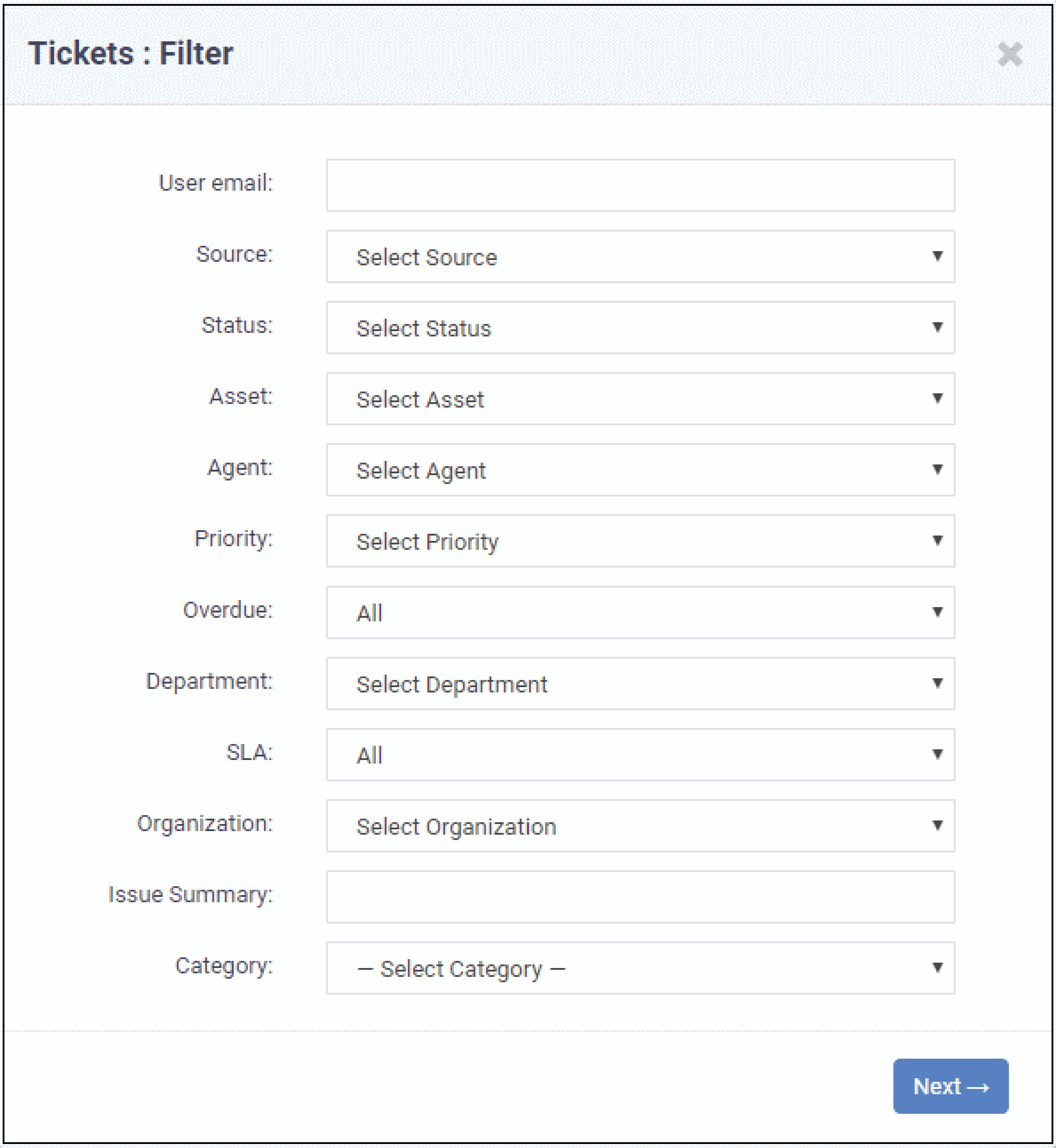
To schedule report generation

- Open the Admin Panel
- Click 'Reports' on the left
- Select the type of report you want to schedule from the sub-menu

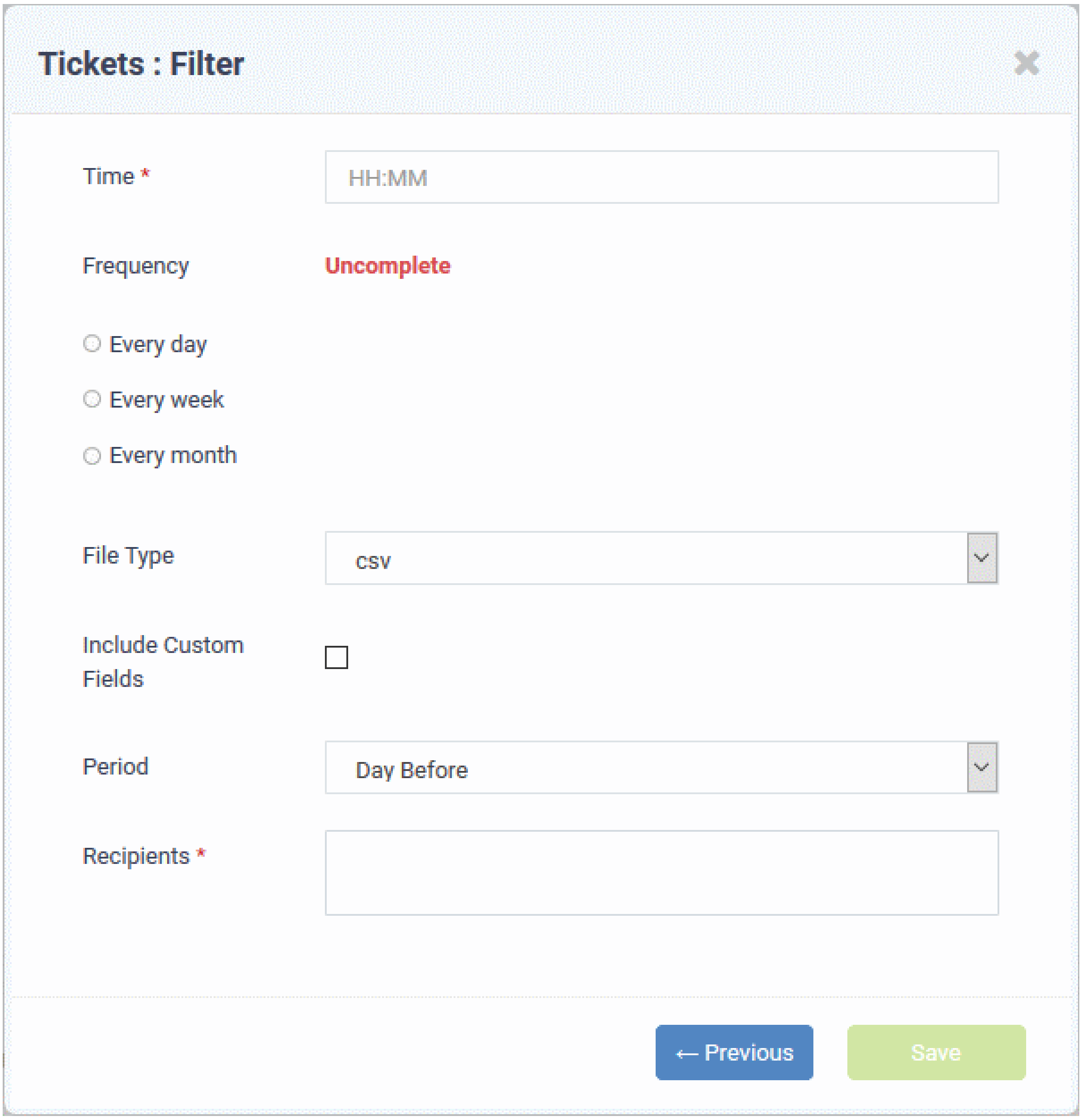
The screenshot below is the 'Tickets' report:



- Click the  icon beside 'Scheduled Reports'
- This will start the report configuration wizard
- The first step is to configure the report filters. Please note the filters will vary depending on the type of report:

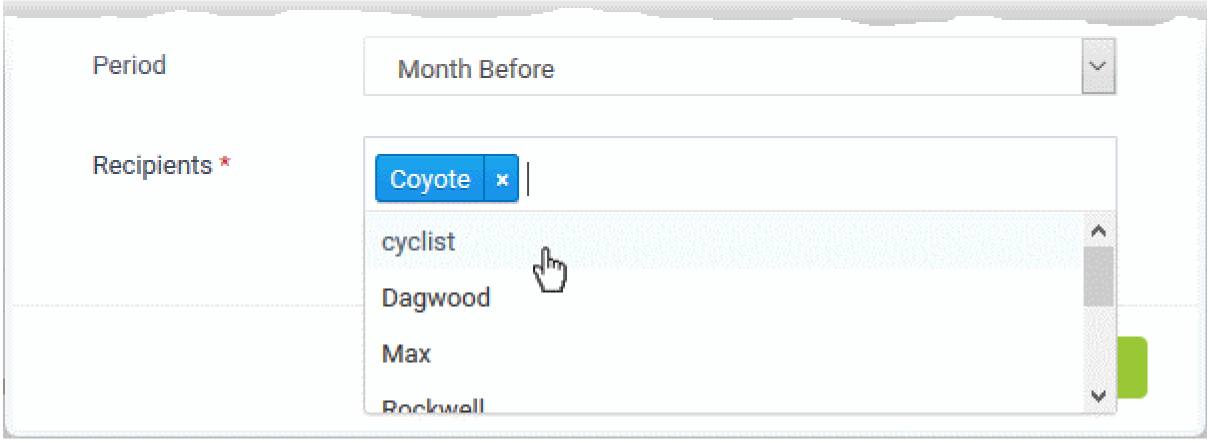


- Configure each filter according to the data you wish to see in the final report. For details about the filters in each type of report, see **Generating Reports**.
- Leave the filters at default values to generate a full, unfiltered report.
- Click Next' to configure report send time, frequency, time-period and recipients:



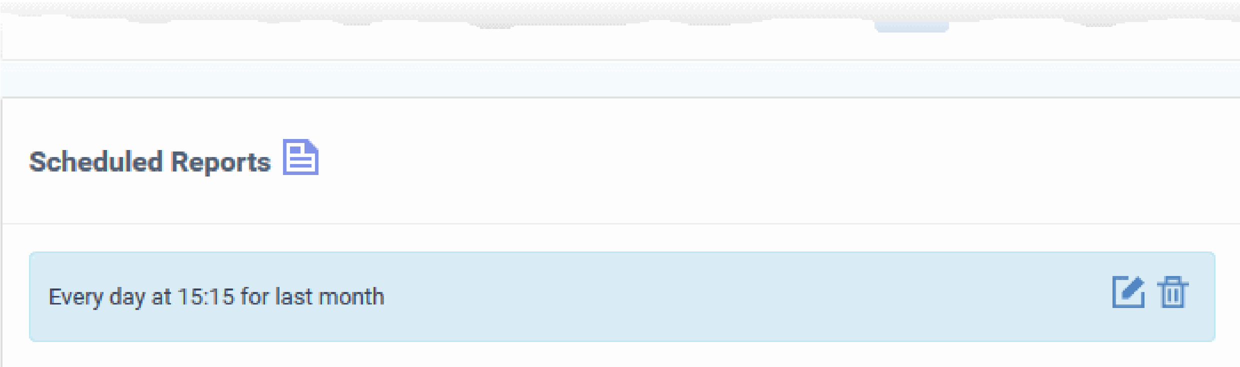
- **Time -** Time of day at which the report should be generated and sent
- **Frequency -** How often the report should be generated and sent:
  - Every day - The report will be sent daily
  - Every week - Select the day(s) of the week on which the report should be sent.
  - Every month - Select the day(s) of the month on which the report should be sent.
- **File Type -** File format of the report. The report will be delivered to recipients in the format you choose here. The available options are:
  - CSV
  - PDF
- **Include Custom Fields -** Specify whether or not the report should contain the custom field values in the details of the item for which the report is generated.
- **Period -** The report coverage period. The options available are:
  - Day Before - Creates a report for the 24 hours preceding the time of report generation
  - Week Before - Creates a report for the 7 days preceding the time of report generation
  - Month Before - Creates a report for the month preceding the time of report generation

- **Recipients -** Select staff/agents to whom the reports should be sent.



- Click 'Save'

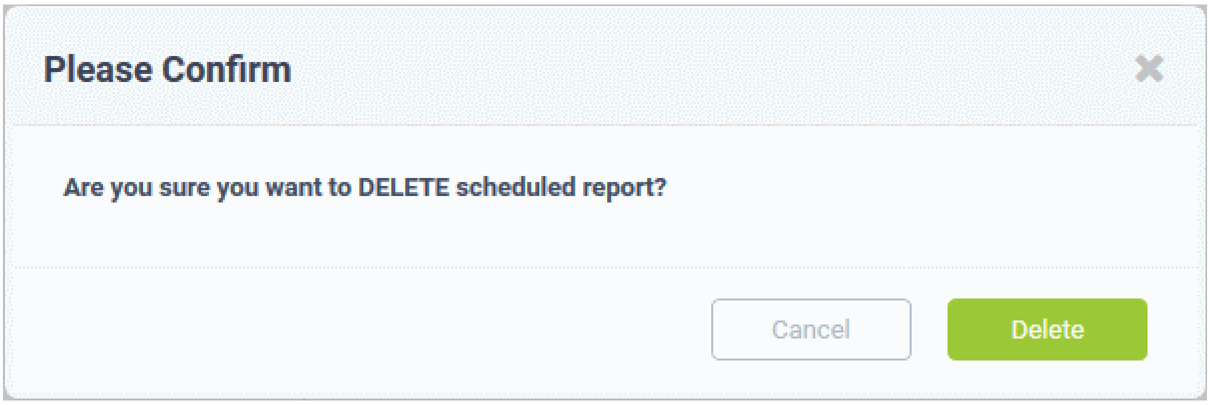
The schedule will be saved and displayed at the bottom of report screen.



The reports will be automatically sent to the configured recipients per the selected frequency.

- To edit a scheduled report, click the edit icon beside the schedule. The filter parameters screen will be displayed. Follow the same add procedure as **explained above** to edit the schedule.
- To delete a schedule, click the trash can icon beside the schedule.

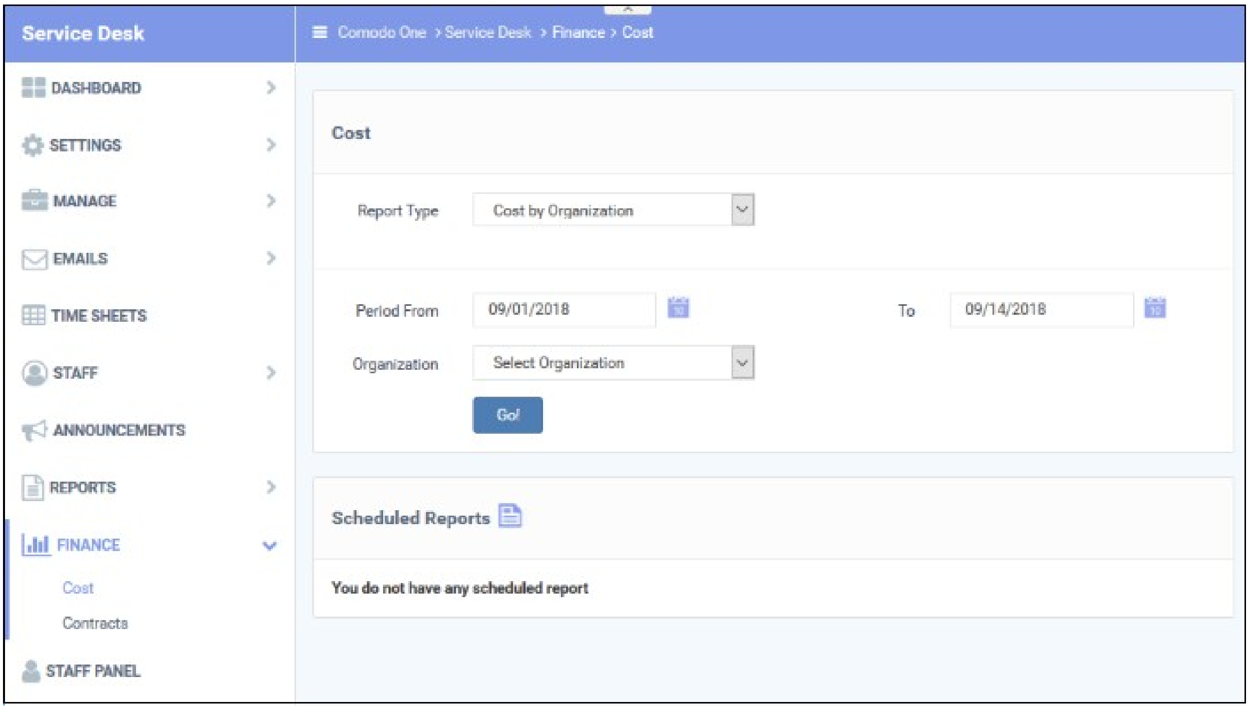
A confirmation dialog will appear.



- Click 'Delete' to remove the report schedule.

2.9 Finance

- The 'Finance' section lets you generate cost reports and manage contracts.
- Click 'Admin Panel' > 'Finance' to open this section



- Cost reports allow you to manage all costs expenses and contracts
- You can also schedule those reports that are automatically generated and send to selected recipients.
- You can generate the reports you want by adding filters. Filters include date range, organization, department, agent, ticket status, asset type and much more.
- You can also set up scheduled reports which are automatically generated at a specific time and sent to recipients of your choice.

To open the 'Reports' screen:

- Make sure you are in the 'Admin' panel
- Click 'Reports' on the left:
- Click 'Cost' in the reports menu

Report Types

- **Cost Reports:** Information about billable time for each organization including asset per hour rate, ticket ID, monthly fee charged for organizations and material cost incurred.
- **Contract Reports** - A report on the current charges accruing to customers operating under a specific contract. The report also shows ticket activity and threads by those customers.

2.9.1 Cost

- Click 'Admin Panel' > 'Finance' > 'Cost'

Cost reports allow you to view billing details for a selected time period for any organization. The report includes per-contract fees for the selected time period, any charges for additional hours and any material/expense costs.

Service Contract

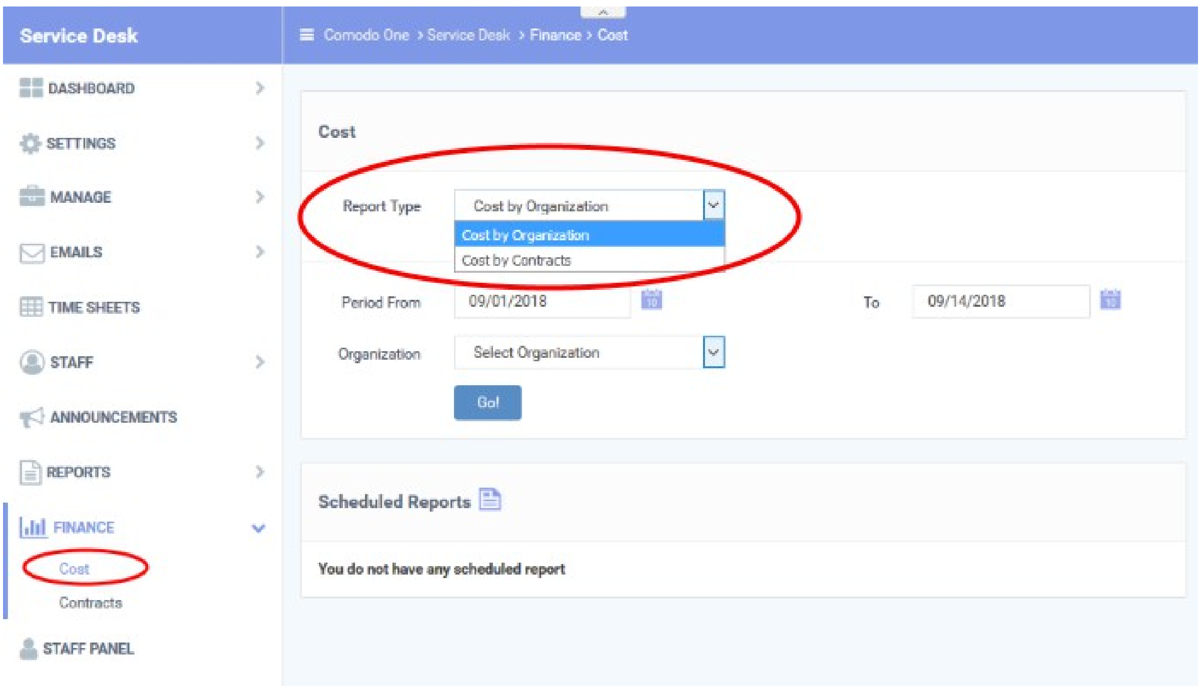
You can create service contracts with customer organizations as required. Contracts can include:

- 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 that exceeds the pre-paid hours (optional). Charging plans include:
  - 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.
  - If no charging plan is applied then the global rates as per default charging plan are applied. The default charging plan can be managed in the **'Admin Panel' > 'Manage' > 'Charging'** interface.
  - See **Contracts**, for more details on the service contracts,

Cost reports can be generated for all organizations in Service Desk, or for an individual organization. Reports can be exported to PDF and CSV formats.

To open the cost report screen,

- Click 'Admin Panel' > 'Finance' > 'Cost'



- The default report period is from the first day of the current month to the current date. You can choose a different period by modifying the dates in the 'From' and 'To' fields.
- You can filter reports by customer organization. If you click the 'Go' button without filtering by organization, then the cost report is for all organizations.

- You can also schedule automatic report generation, and have these reports sent to recipients of your choice.

Filter Options

- **Report Type**: Choose the type of report
    - **Cost by Organization**: Opens filters to fetch cost reports
- **Period From**: Choose the start date of the report period.
- **To**: Choose the end date of the report period.
- **Organization**: Select the organization for which the report should be generated. To include all organizations enrolled on your account, leave as 'Select Organization'.

- Click the 'Go!' button to generate the report.

If no organization filter is selected then the full cost report for all organizations will be generated. A typical report for multiple organizations looks as follows:

ORGANIZATION	MONTH FEE(£)	TICKET#	ASSETS	ASSET HOUR RATE(£/H)	SERVICE TYPES	BILLABLE TIME(HH:MM)	BILLABLE TIME COST(£)	MATERIALS(£)	SUM(£)
Antony Orpanage	1.73 Orpanage paid(2.00/m)	786	Server	5	Onsite	0 months	-	-	1.73 **1.73**
Brake Shoes Kanchi	0.00	820	Workstation	5	Remote	0 months	-	-	0.00 **0.00**
Cycle Trust	13.00 Low cost for Charity(15.00/m)	861	Printer	-	Onsite	0 months	-	-	13.00 **13.00**
Cyclists Inc.	0.00 Cyclist Contract(0.00/m)	-	-	-	-	0 months	-	-	0.00 **0.00**
Dithers Construction Company	43.33 Dithers Contract(50.00/m)	-	-	-	-	0 months	-	-	43.33 **43.33**
Spokes and Wheels	0.00	-	-	-	-	0 months	-	-	0.00 **0.00**

« Prev Next »

* The calculations are made partially. The cost of agreed hours is 0 while hours exceeding the contract limit are calculated using asset rate.

Column Headers

- **Organization**: The name of the organization.
- **Monthly Fee**: Displays the contracted fee amount for the organization. Contracted fees include any fixed weekly/bi-weekly/monthly/annual subscription fees agreed with the organization. The column also displays the name of the contract. If no contract is created for the organization, the monthly fee will be displayed as '0.00'.
- **Tickets #**: The IDs of any ticket(s) that include billing for the organization
- **Assets**: The asset type that was attended as per the ticket.
- **Asset Hour Rate**: The per hour charge-rate set for the asset category as per the contract
- **Service Type**: The kind of services rendered during the service sessions, accounted for billing
- **Billable Time**: Time spent by staff members on resolving each closed ticket.
- **Billable Time Cost**: Charges calculated for billable time (in default currency set for your Service Desk). No charges will be applied here until billable time exceeds the pre-paid hours covered by the contract. Charges for additional hours will be shown here. Charges are calculated based the asset rates defined in the contract. If the asset rates are not defined in the contract, then the global rates will be applied.

- **Materials:** Total cost of materials used/expenses incurred for resolving the issue(s) as mentioned in the ticket.
- **Sum**: Displays the amount chargeable for each ticket and the total amount for the organization.

Download Reports

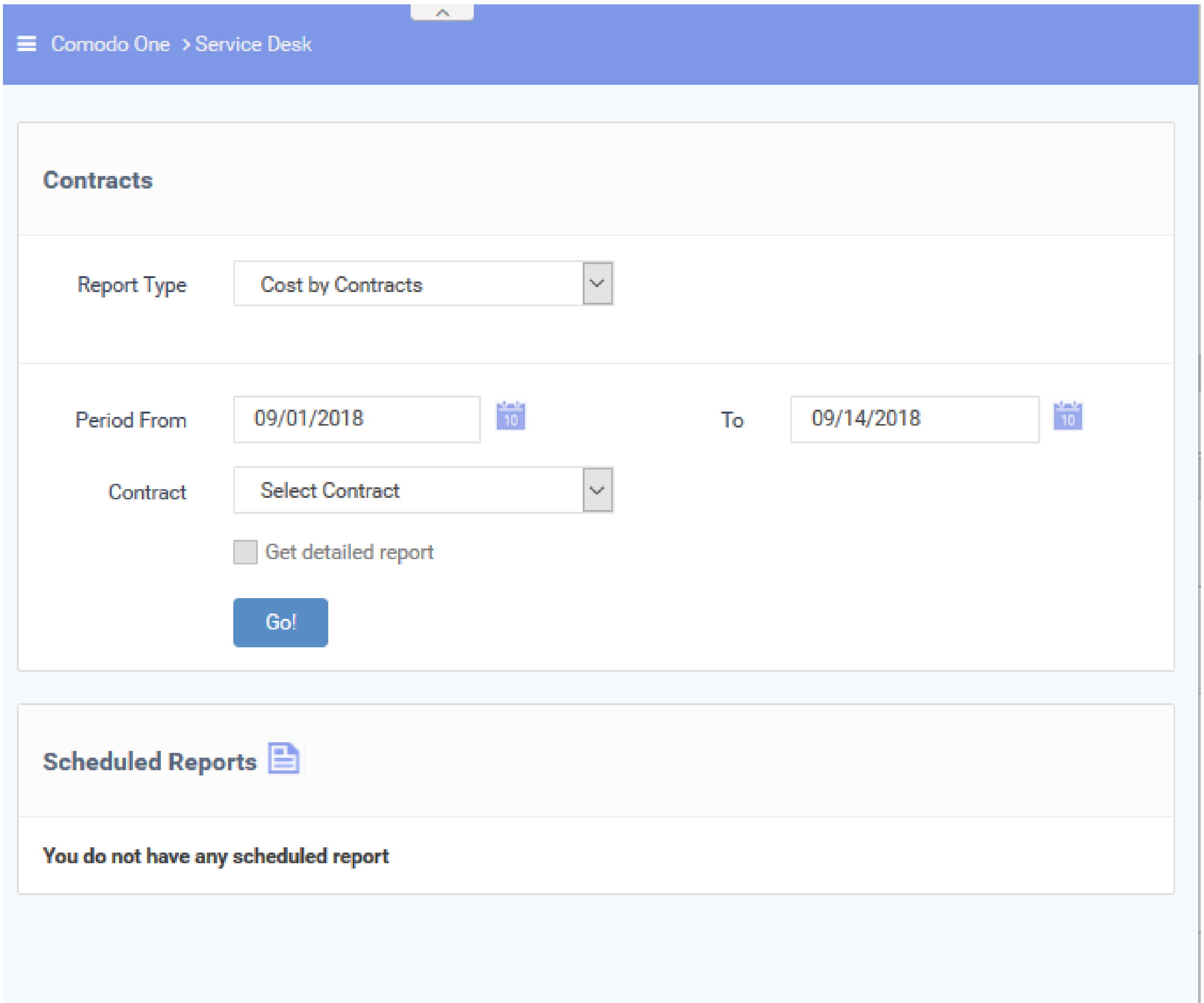
- You can download reports in PDF and CSV formats.
- Click 'Export to PDF' and/or 'Export to CSV' at the top of the table to obtain reports.

Scheduled Reports

- Allows you to schedule automatic reports and configure recipients.
- Click the icon beside 'Scheduled Reports' to start the process. See '**Scheduled Reports**' for more details.

Contract Reports

- Click 'Admin Panel' > 'Finance' > 'Cost' > select 'Cost by Contracts' as the report type.
- A contract report shows the charges accruing to customers who are on specific contracts. The report also shows the number of tickets and support sessions handled for the customer.
- Reports can be generated for all contracts or specific contracts
- Reports can be exported to PDF and CSV formats.
- Click 'Admin Panel' > 'Finance' > 'Contracts' to open the 'Contracts' report interface.



You can generate:

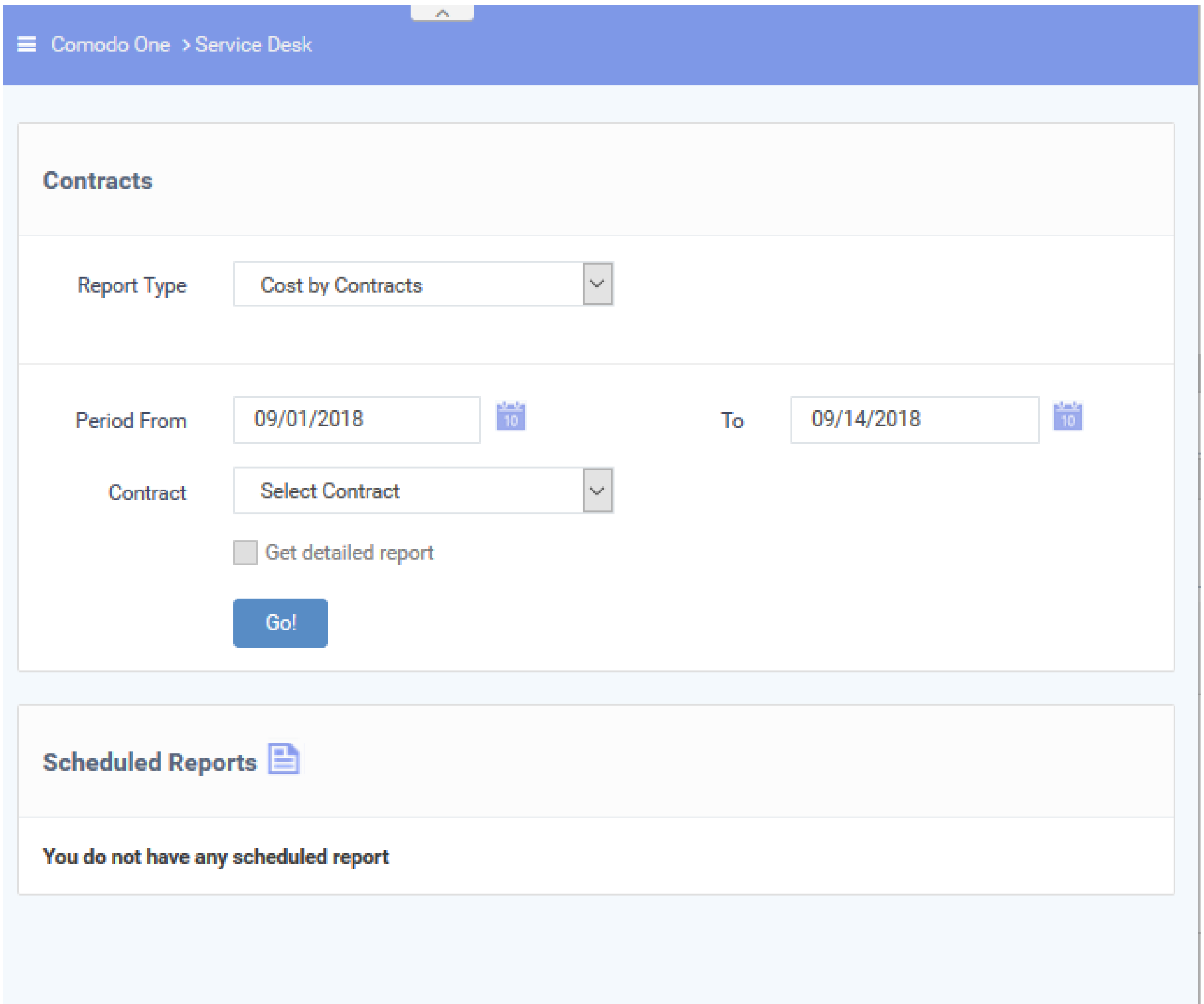
- **Report covering selected period of time**
- **Detailed report for a selected contract**

Generate Report for Selected Period

- The default period for reports is from the first day of the current month to the current date.
- You can select a different period by entering dates in the 'From' and 'To' fields.
- Reports can be generated for a selected contract or for all contracts.
- You can also schedule automatic reports and configure recipients. See **Scheduled Reports** for more details.

To generate a report

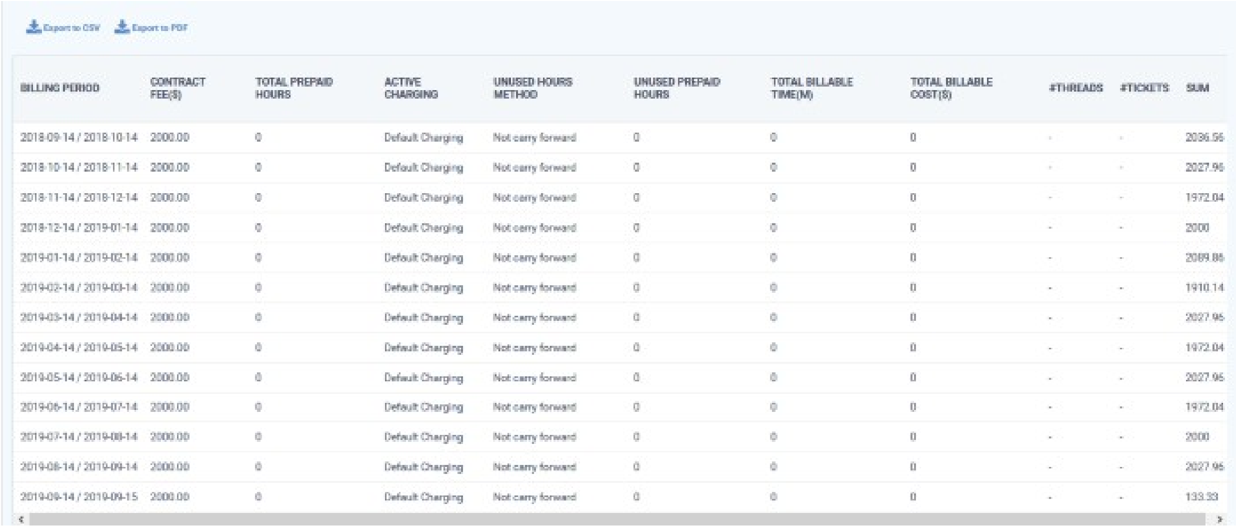
- Click 'Admin Panel' > 'Finance' > 'Cost' > 'Cost by Contracts'



- **Report Type**: You can choose the type of report
  - **Cost by Contracts**: Opens filters to fetch cost reports
- **Period** - Use the calendars to enter the start date and end date of the report period in the 'From' and 'To' fields.
- **Contract -** Choose the service contract for which the report has to be generated. Leave as 'Select Contract' to include all contracts in the report.
- **Get detailed report –** Detailed reports are for all time. Leave this option unselected to generate a report for a specific period.

- Click the 'Go!' button to generate the report for the selected period and filter.

The example shown below is a report for all contracts:



Export to CSV Export to PDF

BILLING PERIOD	CONTRACT FEE($)	TOTAL PREPAID HOURS	ACTIVE CHARGING	UNUSED HOURS METHOD	UNUSED PREPAID HOURS	TOTAL BILLABLE TIME(M)	TOTAL BILLABLE COST($)	#THREADS	#TICKETS	SUM
2018-09-14 / 2018-10-14	2000.00	0	Default Charging	Not carry forward	0	0	0	-	-	2036.56
2018-10-14 / 2018-11-14	2000.00	0	Default Charging	Not carry forward	0	0	0	-	-	2027.96
2018-11-14 / 2018-12-14	2000.00	0	Default Charging	Not carry forward	0	0	0	-	-	1972.04
2018-12-14 / 2019-01-14	2000.00	0	Default Charging	Not carry forward	0	0	0	-	-	2000
2019-01-14 / 2019-02-14	2000.00	0	Default Charging	Not carry forward	0	0	0	-	-	2089.86
2019-02-14 / 2019-03-14	2000.00	0	Default Charging	Not carry forward	0	0	0	-	-	1910.14
2019-03-14 / 2019-04-14	2000.00	0	Default Charging	Not carry forward	0	0	0	-	-	2027.96
2019-04-14 / 2019-05-14	2000.00	0	Default Charging	Not carry forward	0	0	0	-	-	1972.04
2019-05-14 / 2019-06-14	2000.00	0	Default Charging	Not carry forward	0	0	0	-	-	2027.96
2019-06-14 / 2019-07-14	2000.00	0	Default Charging	Not carry forward	0	0	0	-	-	1972.04
2019-07-14 / 2019-08-14	2000.00	0	Default Charging	Not carry forward	0	0	0	-	-	2000
2019-08-14 / 2019-09-14	2000.00	0	Default Charging	Not carry forward	0	0	0	-	-	2027.96
2019-09-14 / 2019-09-15	2000.00	0	Default Charging	Not carry forward	0	0	0	-	-	133.33

Column Headers

- **Contract Fee**: The fee for the billing cycle as set out in the contract.
- **Billing Period**: Billing cycle defined in the contract.
- **Active Charging**: The charging plan applied to the contract.
    - Click 'Admin Panel' > 'Manage' > 'Charging' to view and manage charging plans.
- **Total Prepaid Hours** : The total pre-paid hours defined in the contract across all service types.
- **Unused hours Method**: Whether or not the contract states unused pre-paid hours should be carried forward to the next billing period.
- **Unused Prepaid Hours**: The amount of 'pre-paid' time which is still unused by customers on the contract.
- **Total Billable Time**: Time which is chargeable to the customer for working on their tickets. Time becomes billable after all 'pre-paid' hours are used up. If you have assigned a charging plan to the contract, then they will be charged at the default/variable rates set out in the plan. If no plan is assigned to the contract then work will be charged at the global asset rates.
    - Click 'Admin Panel' > 'Charging' to view and manage charging rates.
    - Click 'Admin Panel' > 'Assets' to view and manage global asset rates.
- **Total Billable Cost**: The total cost calculated for the billable time
- **#Threads**: The total number of service sessions attended for the company to which the contract is bound, within the report period.
- **#Tickets**: The number of tickets attended for the company within the report period.
- **Sum**: The total of the 'Total Billable Cost' and the 'Current Fee'.

Download the Report

- You can download reports in PDF and CSV formats.
- Click 'Export to PDF' and/or 'Export to CSV' at the top of the table to obtain reports.

Scheduled Reports

- Click the icon beside 'Scheduled Reports' to schedule a report and configure recipients. See '**Scheduled Reports**' for more details.

2.9.2 Contracts

Click 'Admin Panel' > 'Finance' > 'Contracts'

- Service Desk allows you to create service contracts for customer organizations as required.
- Admins can define weekly, bi-weekly, monthly or annual subscription fees, and offer 'pre-paid hours' that are covered by the fee.
- Each contract can also include a custom charging plan to charge specific prices for certain types of service.
- Click 'Admin Panel' > 'Finance' > 'Cost' to generate reports for contracts. See 'Cost' to find out more about contract reports.

Each contract includes the following components:

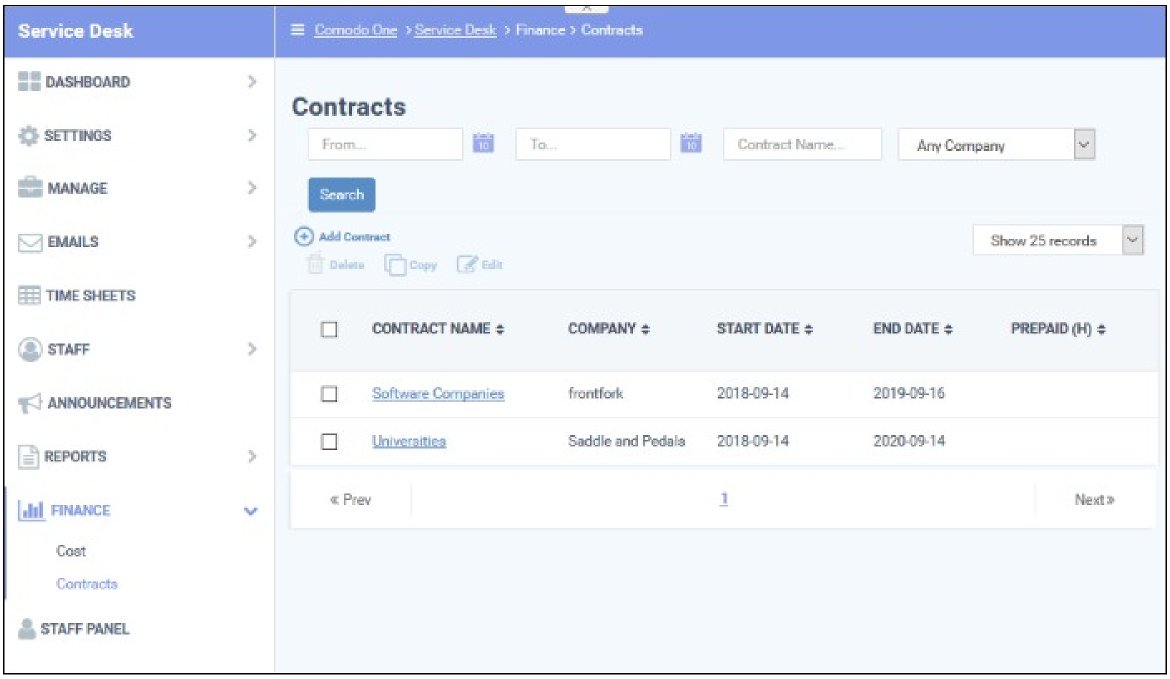
- The contract period.
- Subscription fee (optional).
- Billing period for the subscription.
- Pre-paid hours for different service types ('On-site', 'Remote' and 'Telephone'). Work done under prepaid hours is not added to the monthly bill.
- Option to carry forward unused pre-paid hours to the next billing cycle.
- Option to specify a charging plan in the contract. A 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).

    Notes:

    - Charging plans are only applied after any pre-paid hours have been used up.
    - If no custom charging plan is applied then the global rates are applied.
        - Global asset rates can be managed by configuring 'Default Charging' in 'Admin Panel' > 'Manage' > 'Charging'.
        - For more details see **Default Charging Plan** in **Manage Charging Plans**.
- For more details, see **Appendix 3 - How charging works in Service Desk**.

To open the contracts interface:

- Open 'Admin Panel' > ' Finance' > 'Contracts'



The interface allows you to view, enable/disable, clone and create new contracts.

Charging Contracts - Column Descriptions	
Column Header	**Description**
Contract Name	Contract label. • Click a contract name to view and edit its details See '**Manually create a new contract**.' for more details on this interface.
Company	The customer organization with whom the contract is associated.
Start Date	The date from which the contract is effective.
End Date	The expiry date of the contract.
Pre-Paid	The number of hours for which the customer will not be charged.

The following sections explain more about creating new new contracts and viewing details of a contract:

- **Create new contracts**
- **View / Edit contract details**
- **Remove a Contract**
- **Sorting and filtering options in the 'Contracts' interface**

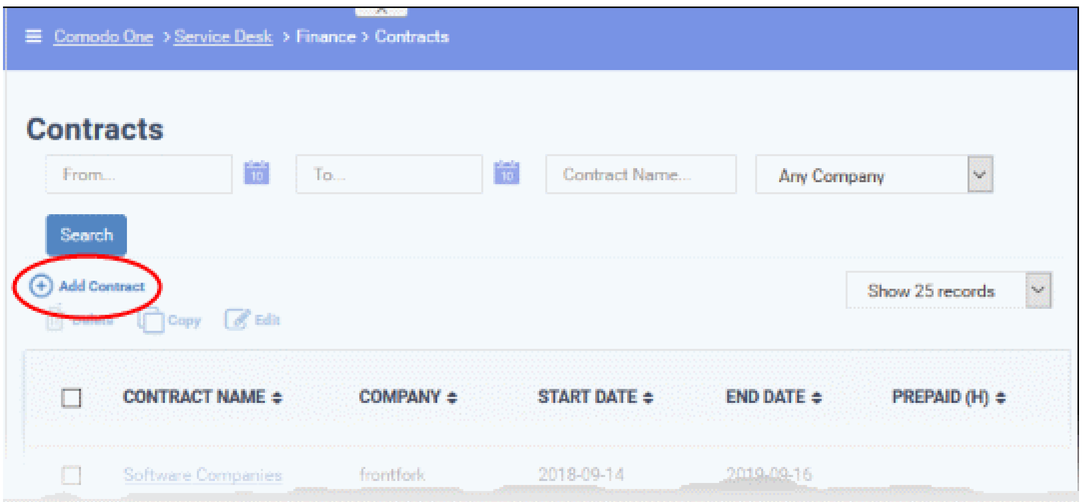
Create New Contracts

New contracts can be added in two ways:

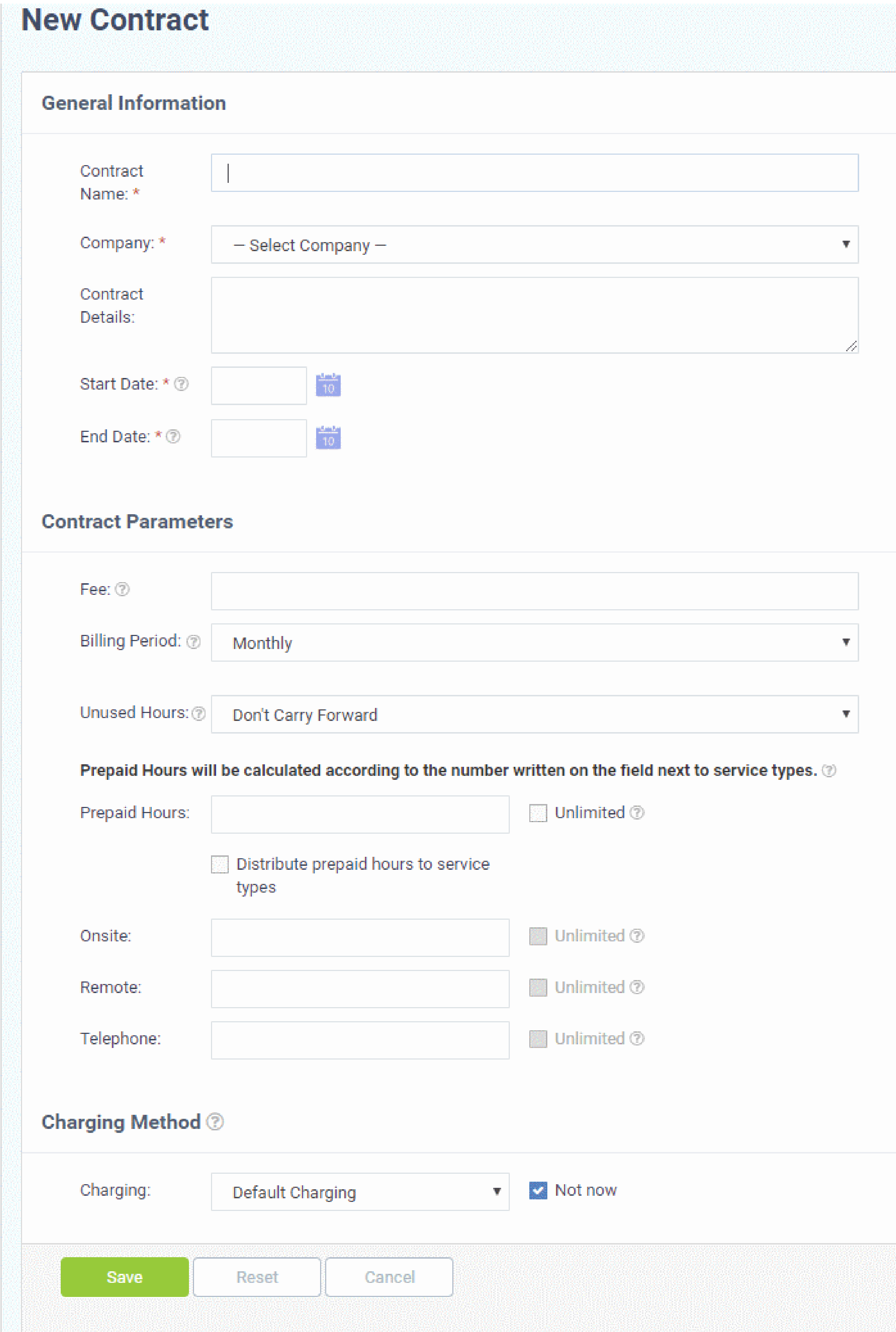
- **Manually create a new contract.**
- **Clone an existing contract which can be modified to create a new contract.**

Manually create a new contract

- Open 'Admin Panel' > 'Finance' > 'Contracts'
- Click 'Contracts' on the left
- Click 'Add Contract' at the top of the 'Contracts' interface



The 'New Contract' form will open:



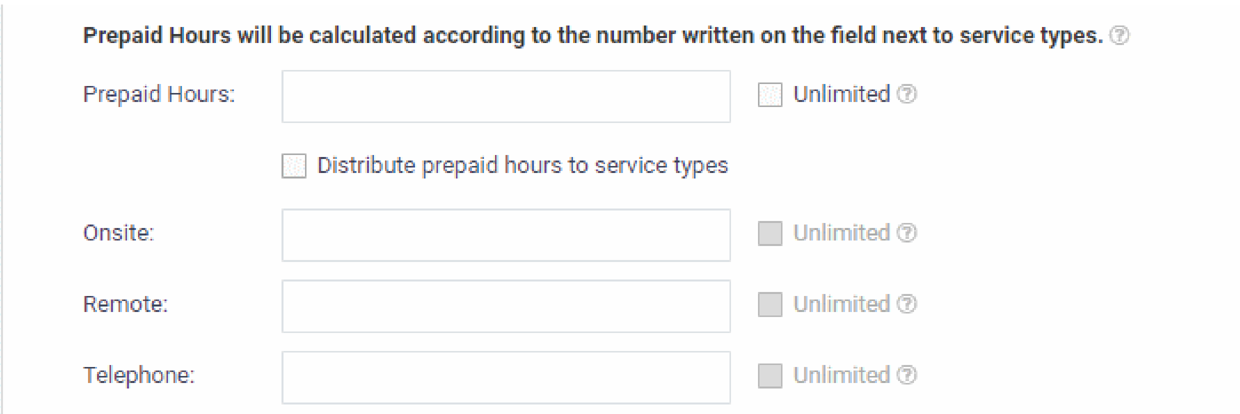
- Complete the form as follows:

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 for 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 standard subscription fee will be charged. The charges for the service sessions will be calculated based on other parameters defined in the contract
- **Billing Period** - Enter the subscription period. The available options are:
  - Weekly
  - Bi-Weekly
  - Monthly
  - Yearly
- **Unused Hours** - Choose whether or not any remaining pre-paid hours at the end of a billing cycle are carried over to the next cycle. 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** - 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

Charging Method

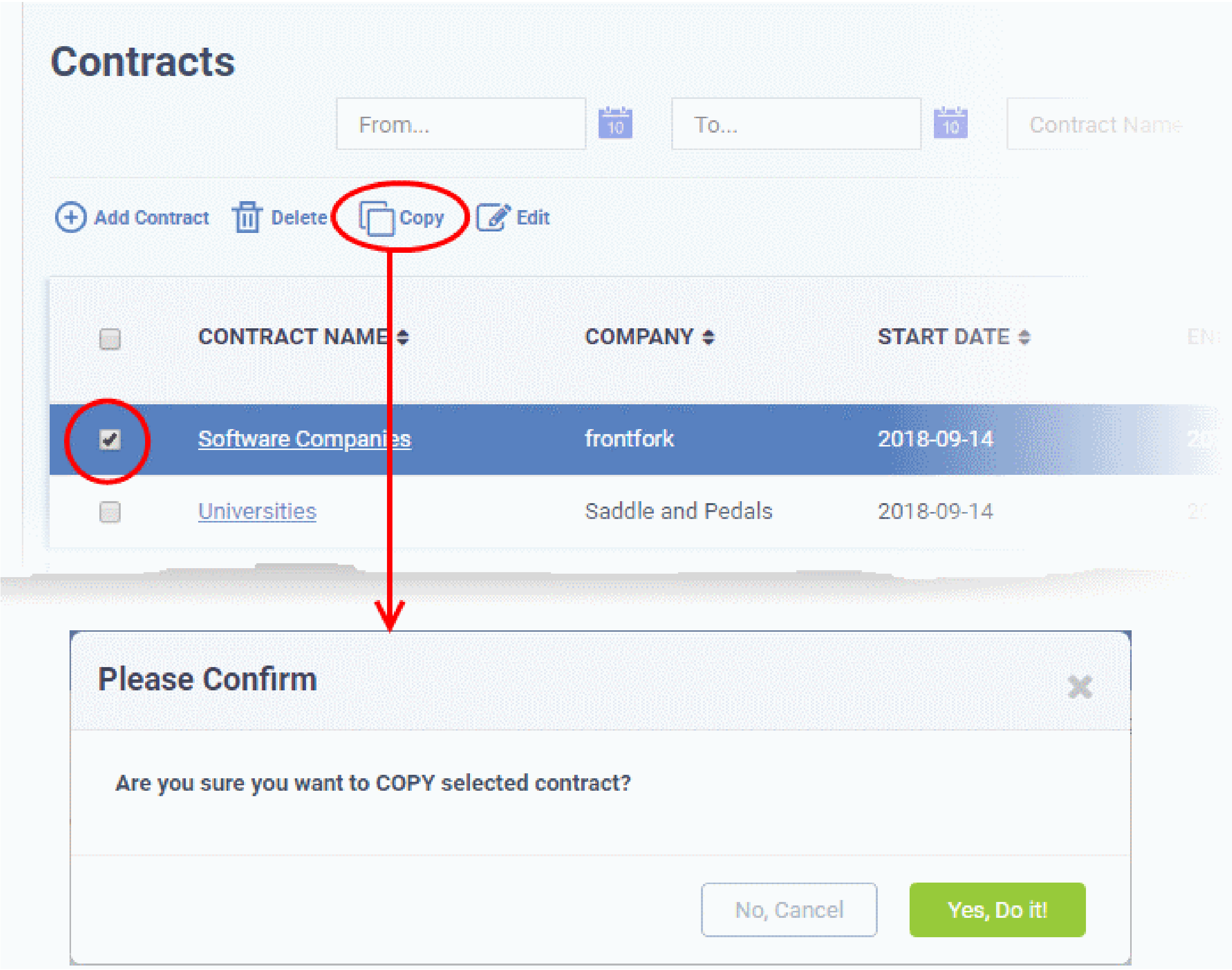
- **Charging** - Select a 'Charging plan' for the contract. If you do not want to choose a charging plan at this moment, select 'Not now'.
  - Charging plans allow you to set a default hourly rate and custom rates for specific types of work. Admins can create creating plans in 'Admin Panel' > 'Manage' > 'Charging'.

- Admins can associate the contract with a charging plan at any time. See Manage **Charging Plans** for more details.
- If you do not apply a charging plan, then the asset rates as per the default charging plan will be applied for sessions that exceed the pre-paid hours. For more details, see **Default Charging Plan** in **Manage Charging Plans**..

- 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.

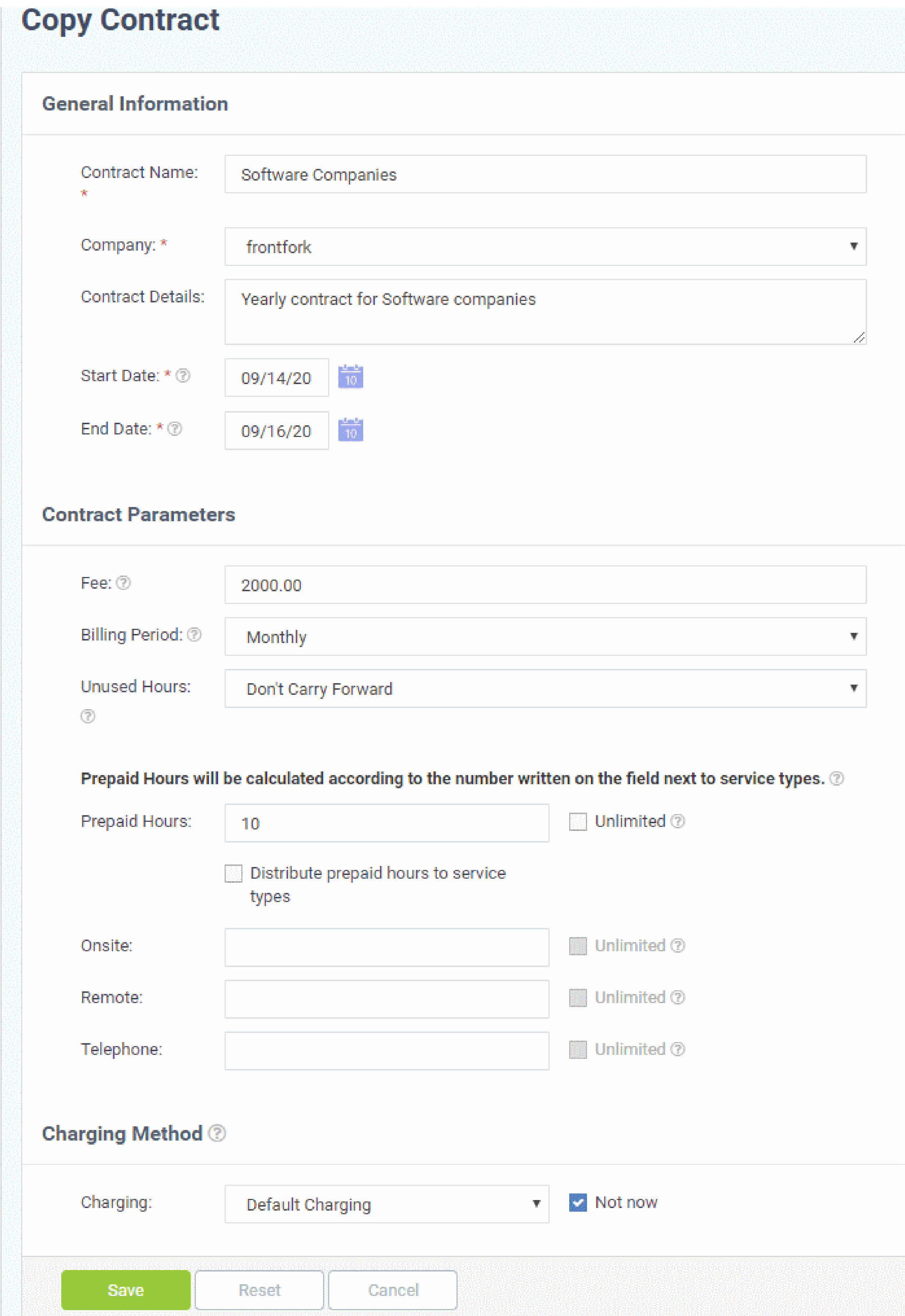
Clone an existing contract to create a new contract

- Open 'Admin Panel' > 'Finance' > 'Contracts'
- Click 'Contracts' on the left
- Select the contract which you want to use as a template from the 'Contracts' interface and click 'Copy'



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

The 'Copy Contract' form will appear. The general information, contract parameters and pre-paid hours are pre-populated with the values of those in the source contract.



- Enter a new name, choose the organization and edit the contract parameters and select a new charging plan (optional) for the contract, as explained **above**.

- Click 'Save' to add the new contract.

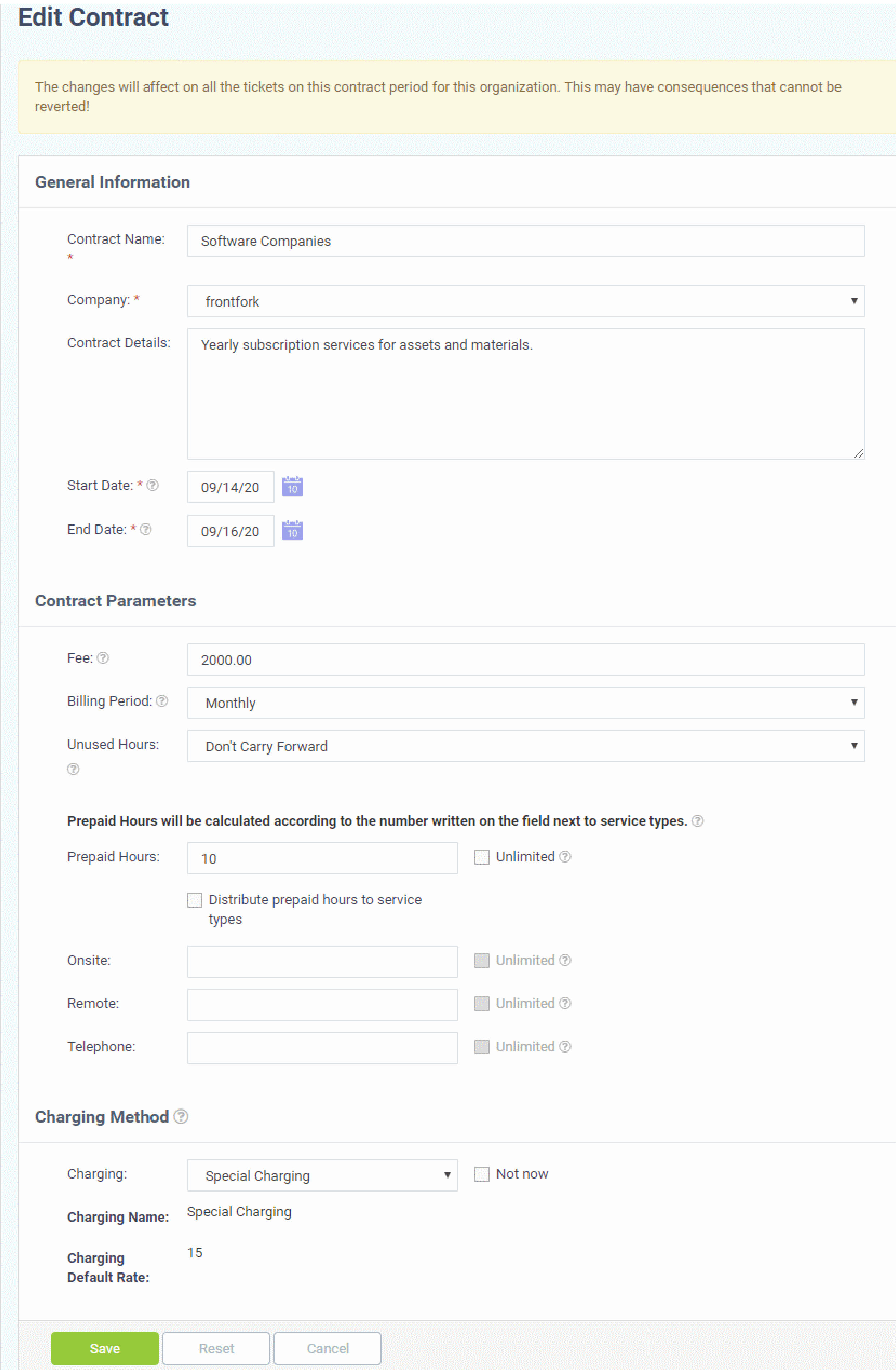
View and Edit Contract Details

The 'Edit Contract' interface lets you view details such as the company associated with the contract, the duration of the contract, the contract fee and any charging plans.

To view the details of a contract

- Open 'Admin Panel' > 'Finance' > 'Contracts'
- Click the name of a contract

  Or
- Select a contract and click 'Edit' on the top


Edit Contract
The changes will affect on all the tickets on this contract period for this organization. This may have consequences that cannot be reverted!
General Information
Contract Name: *
Software Companies
Company: *
frontfork
Contract Details:
Yearly subscription services for assets and materials.
Start Date: *
09/14/20
End Date: *
09/16/20
Contract Parameters
Fee:
2000.00
Billing Period:
Monthly
Unused Hours:
Don't Carry Forward
Prepaid Hours will be calculated according to the number written on the field next to service types.
Prepaid Hours:
10
Unlimited
Distribute prepaid hours to service types
Onsite:
Unlimited
Remote:
Unlimited
Telephone:
Unlimited
Charging Method
Charging:
Special Charging
Not now
Charging Name:
Special Charging
Charging Default Rate:
15
Save
Reset
Cancel

The 'Edit Contract' interface shows general information, contract parameters, pre-paid hours and the details of the charging method applied to the contract. You can edit the details if required. See **Manually create a new contract.** for more details on the parameters.

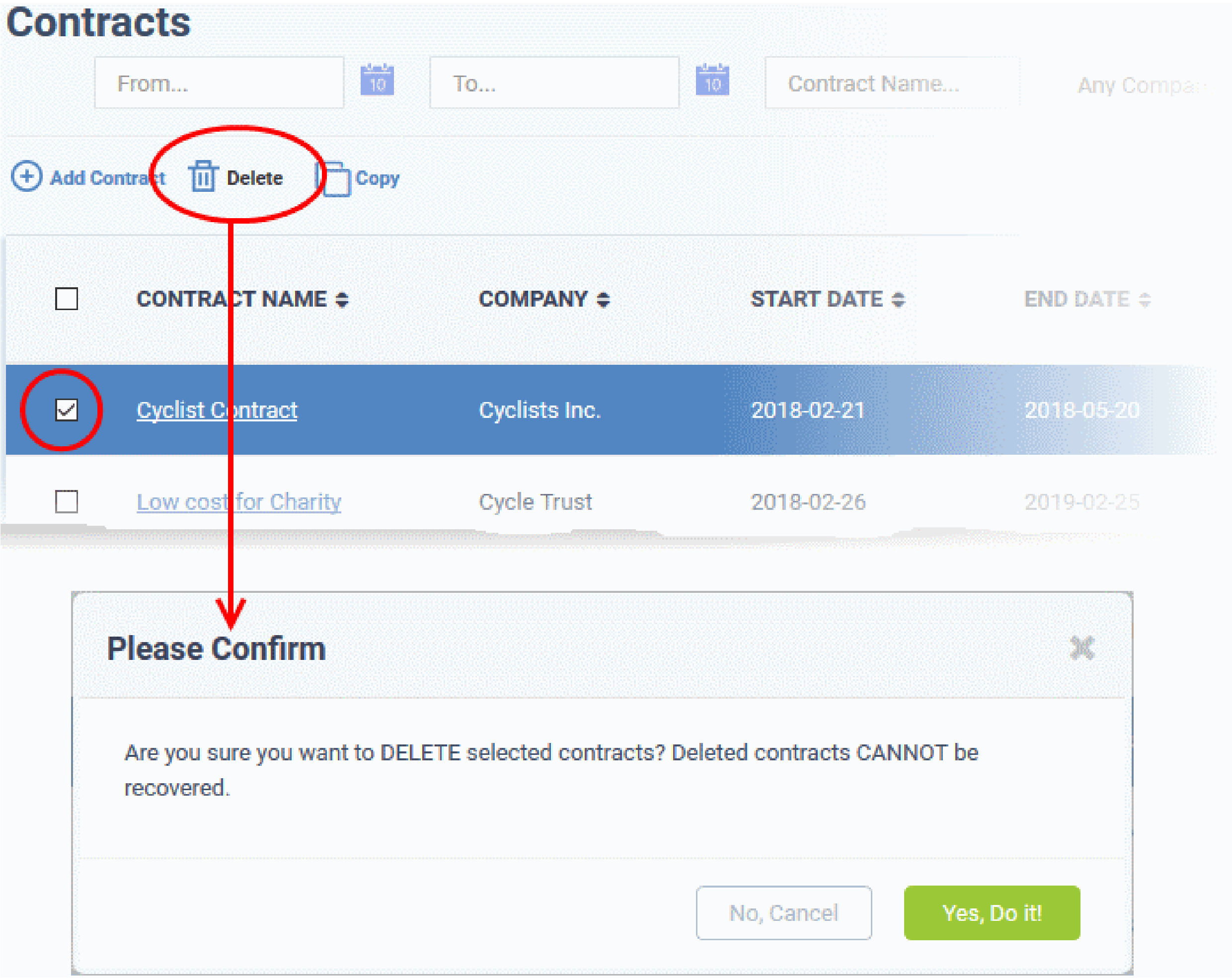
- Click Save for your changes to take effect.

The changes will be applied to all tickets belonging to the organizations to which the contract is applied.

Remove a Contract

You can remove any unwanted/out-dated contracts from Service Desk

- Open 'Admin Panel' > 'Finance' > 'Contracts'
- Click the name of a contract to be removed
- Click 'Delete'



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

The contract will be removed from the company.

Sorting and filtering options in the 'Contracts' interface

Sorting Options:

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

Search Options:

You can search for contracts based on their coverage period, name and organization.

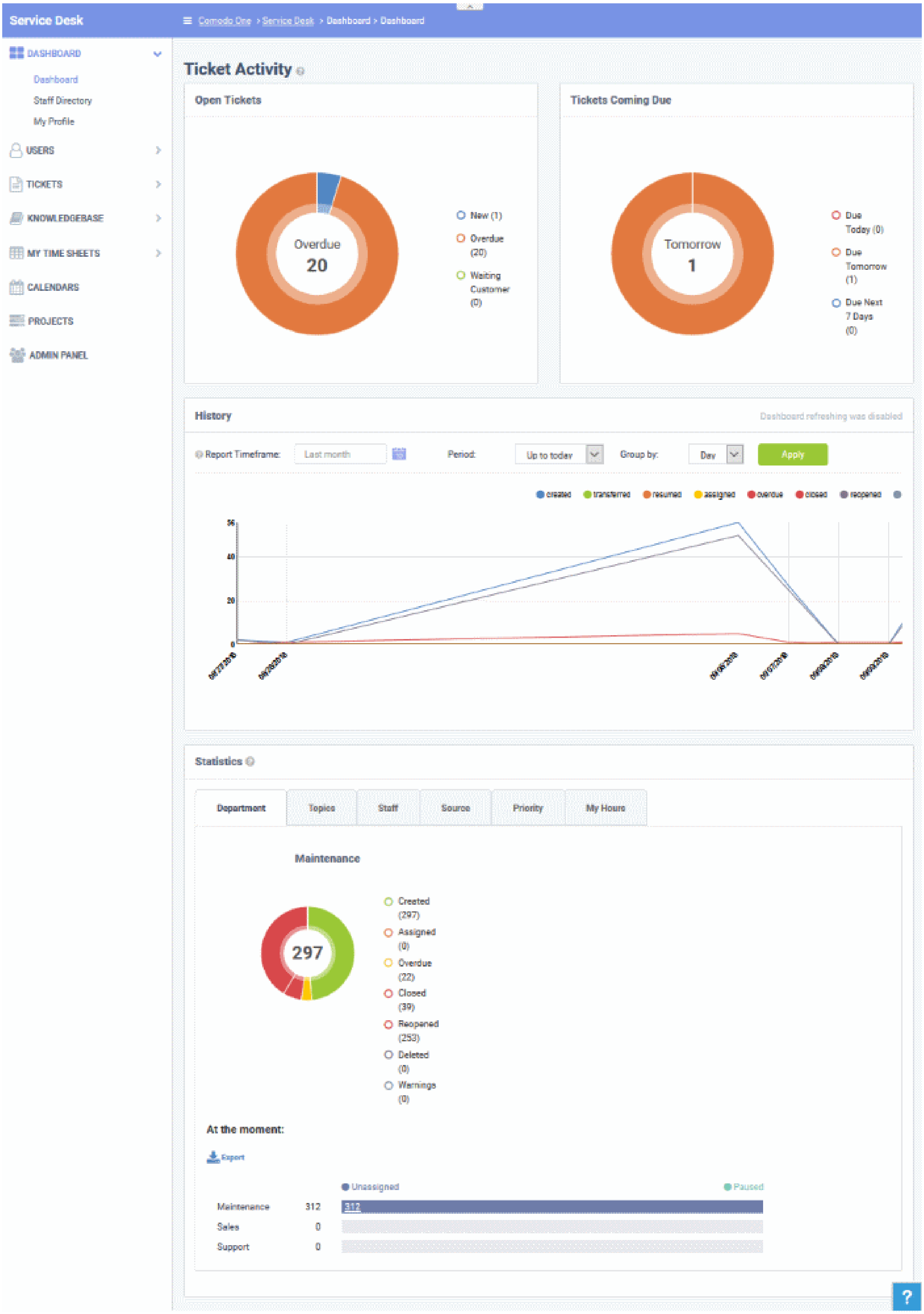
- Use the 'From' and 'To' fields to search for contracts that are valid between specific date ranges.
- To search by contract name, type a contract name in the 'Contract Name' field.
- Use the 'Company' drop-down to filter contracts by specific company.
- Click the 'Search' button apply your filter.
- To clear all filters, simply click 'Contracts' on the left.

3 Service Desk Staff Panel

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

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

Main Functional Areas



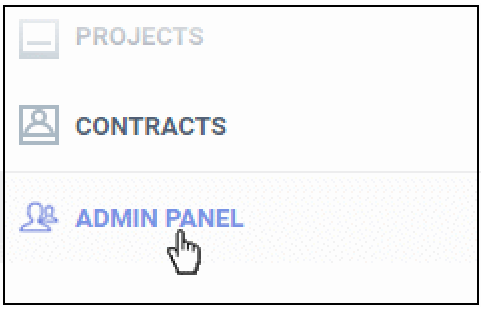
- **Dashboard -** Allows staff to view a graphical summary of ticket activity, including their assigned, closed and due tickets. Tickets are also sorted by department, ticket category, staff member, source and priority. See **Staff Panel Dashboard** for more details.
- **Users -** Allows staff to add/import users and 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.
- **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 be shared with and tracked by other staff members. See '**Managing Calendars**' for more details.
- **Projects** - Allows staff to create task-orientated projects which span multiple tickets, departments and agents. See **Managing Projects** for more details.

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

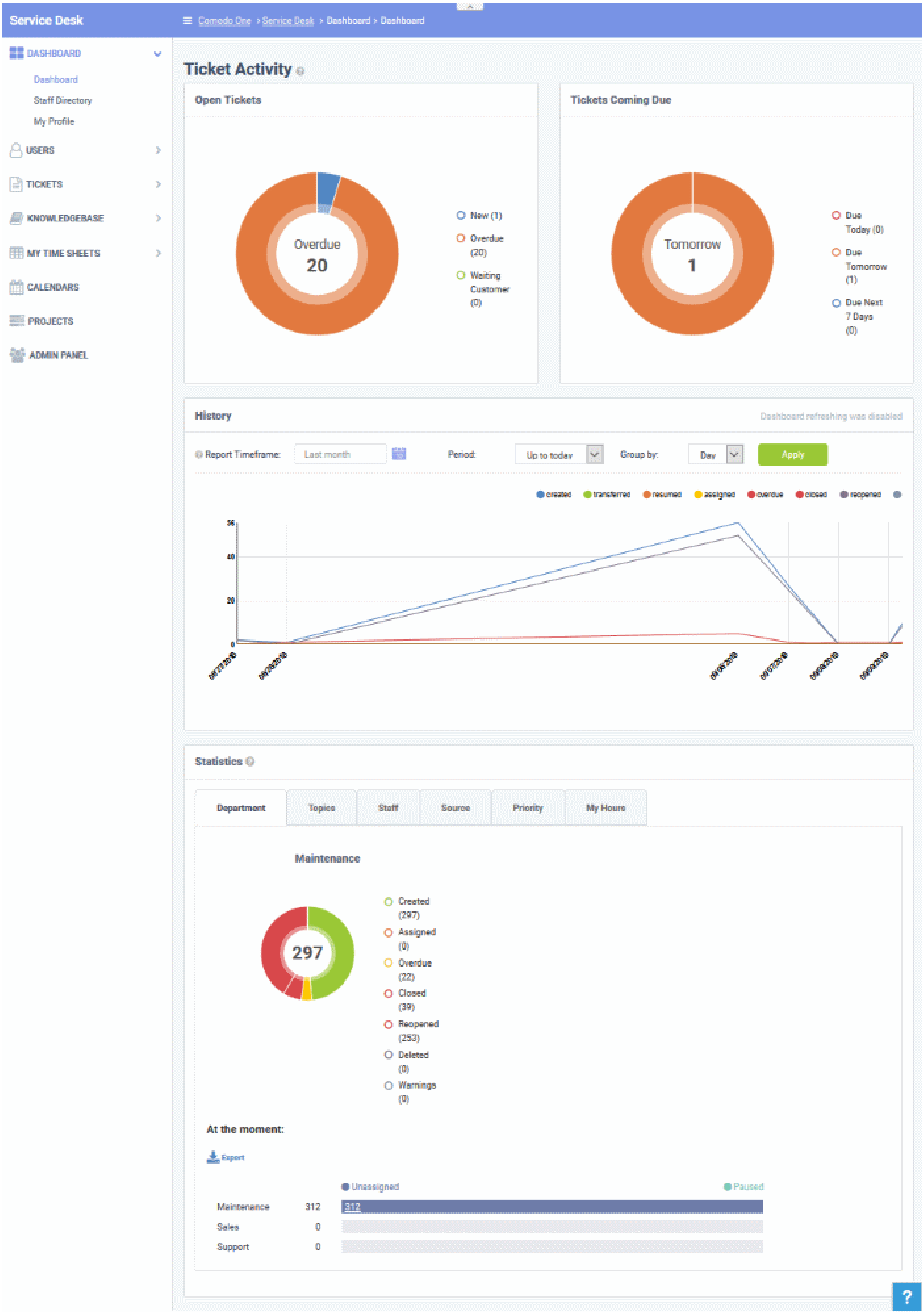
Click the link at the bottom of the left-hand menu to switch between the admin and staff panels. This is only available to staff members that also have admin rights.



3.1 Staff Panel Dashboard

The staff panel dashboard contains three areas:

- Dashboard - A graphical overview of ticket activity and related statistics.
- Staff Directory - The names of all staff enrolled into Service Desk.
- My Profile - Allows staff to configure their contact details, time zone, preferred language and more.

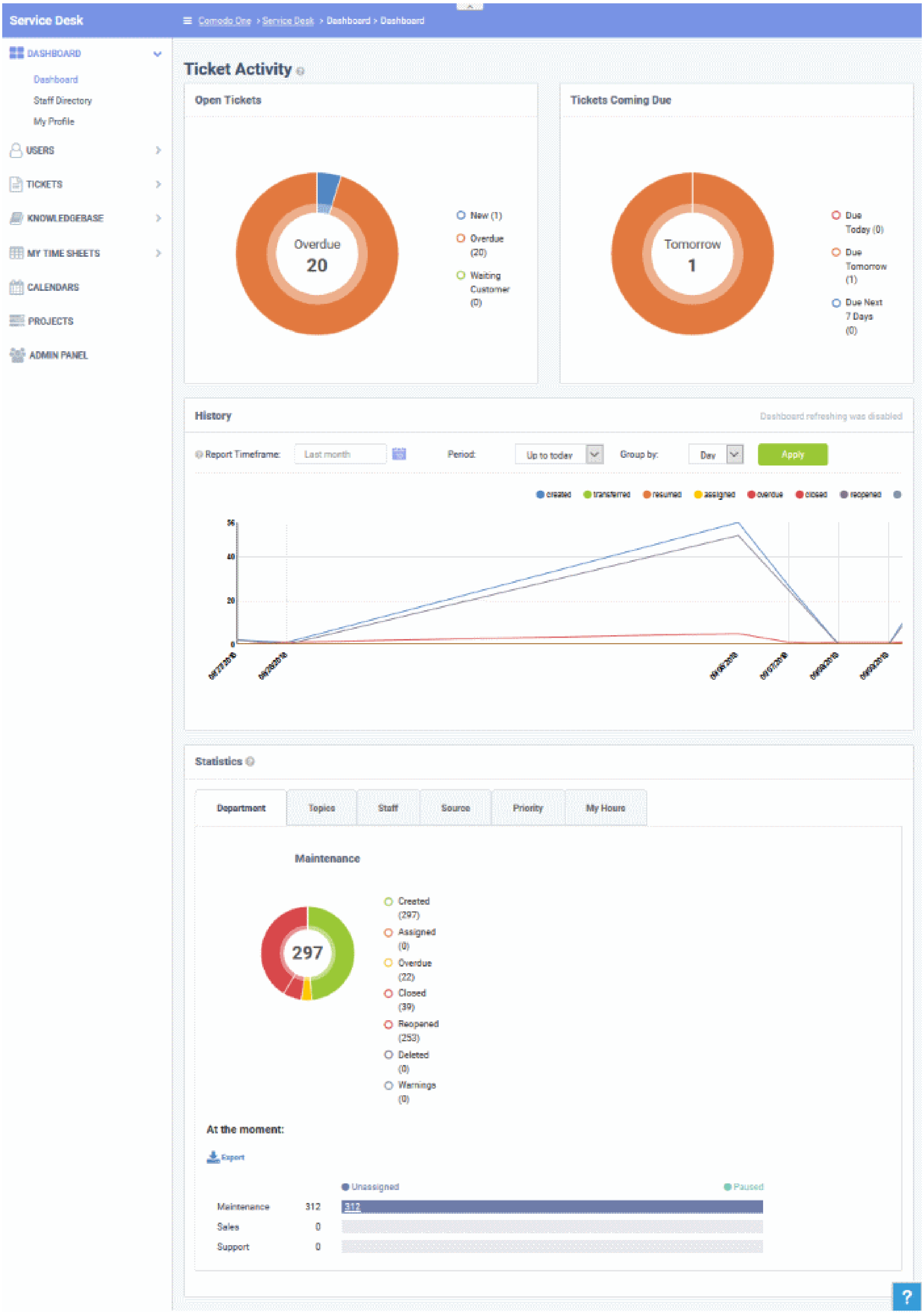

Service Desk
Comodo One > Service Desk > Dashboard > Dashboard
DASHBOARD
Dashboard
Staff Directory
My Profile
USERS
TICKETS
KNOWLEDGEBASE
MY TIME SHEETS
CALENDARS
PROJECTS
ADMIN PANEL
Ticket Activity
Open Tickets
Overdue
20
New (1)
Overdue (20)
Waiting Customer (0)
Tickets Coming Due
Tomorrow
1
Due Today (0)
Due Tomorrow (1)
Due Next 7 Days (0)
History
Dashboard refreshing was disabled
Report Timeframe:
Last month
Period:
Up to today
Group by:
Day
Apply
created
transferred
resumed
assigned
overdue
closed
reopened
Statistics
Department
Topics
Staff
Source
Priority
My Hours
Maintenance
297
Created (297)
Assigned (0)
Overdue (22)
Closed (39)
Reopened (253)
Deleted (0)
Warnings (0)
At the moment:
Export
Unassigned
Paused
Maintenance 312
312
Sales 0
Support 0

The following sections explain more about:

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

3.1.1 View the Dashboard and Export Reports

- Click 'Staff Panel' > 'Dashboard' > 'Dashboard' to open this interface.
- 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 stats and charts about tickets assigned to the staff member.



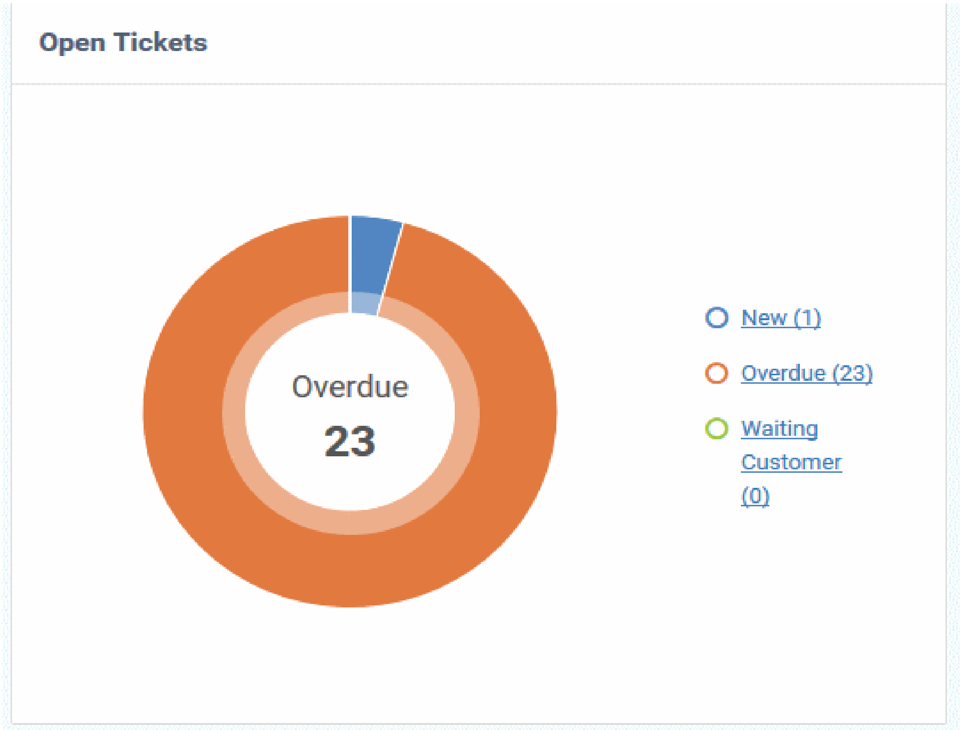
Ticket Activity

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

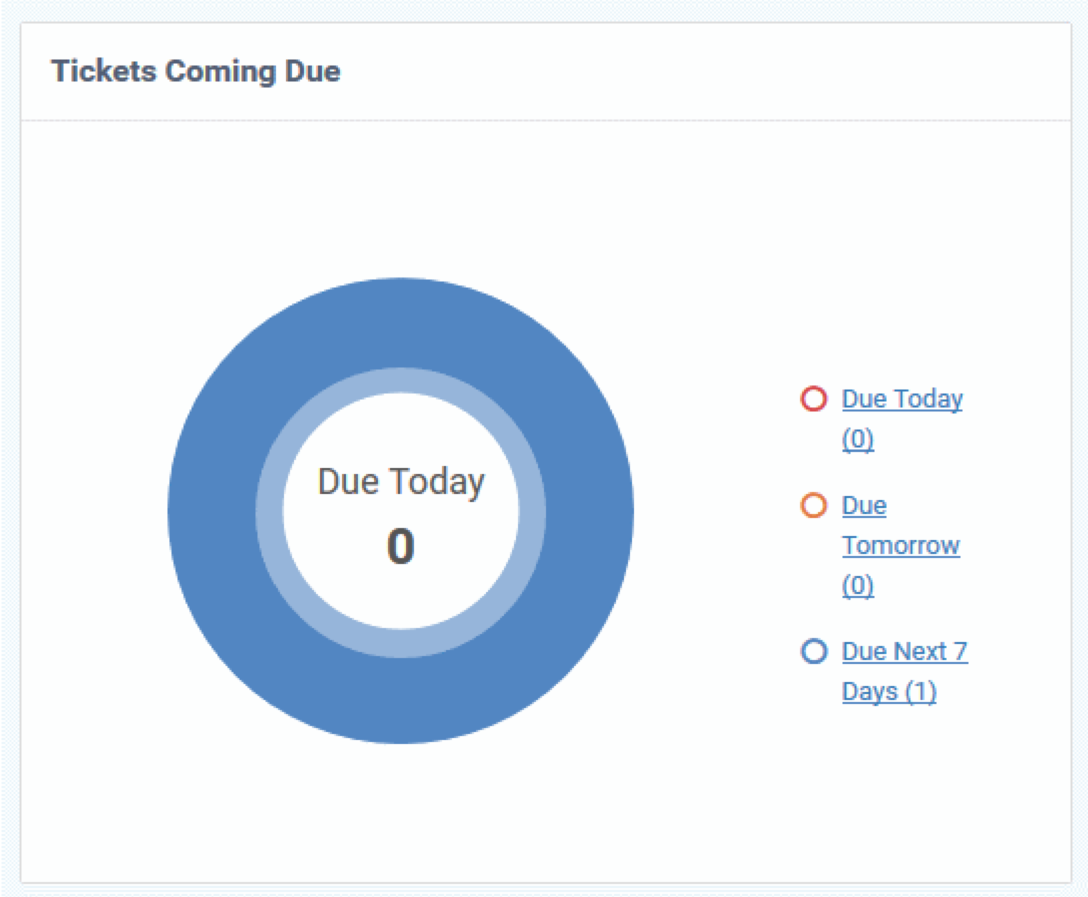
The total number of unresolved tickets. The pie chart breaks this down into tickets that are yet to be attended (new), overdue and awaiting customer response.



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

Ticket Coming Due

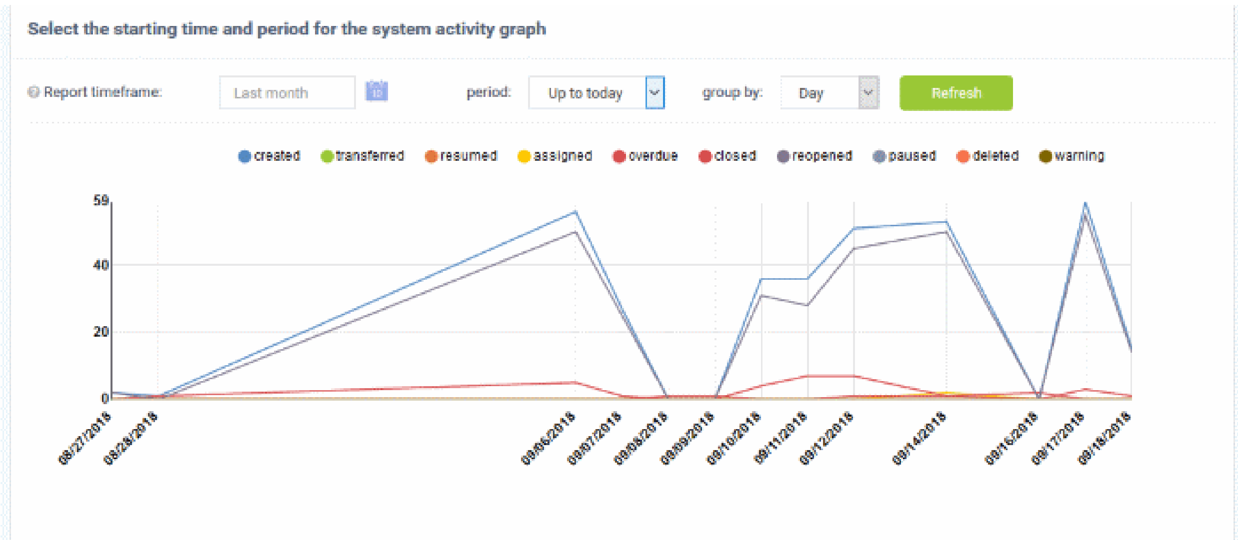
A heads up on tickets that are due in the near future:



- 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.



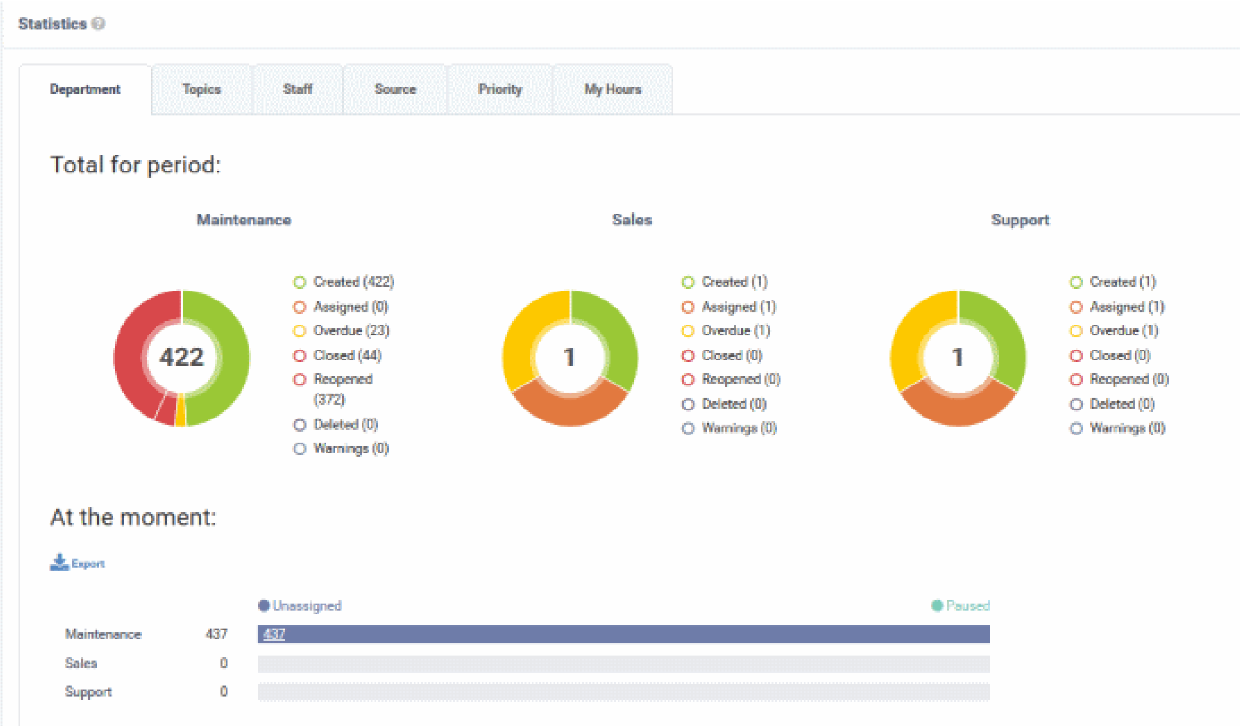
By default, the graph shows details for the previous 30 days. Use the 'Report timeframe' options to change the time-period. Click 'Refresh' to implement your changes.

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

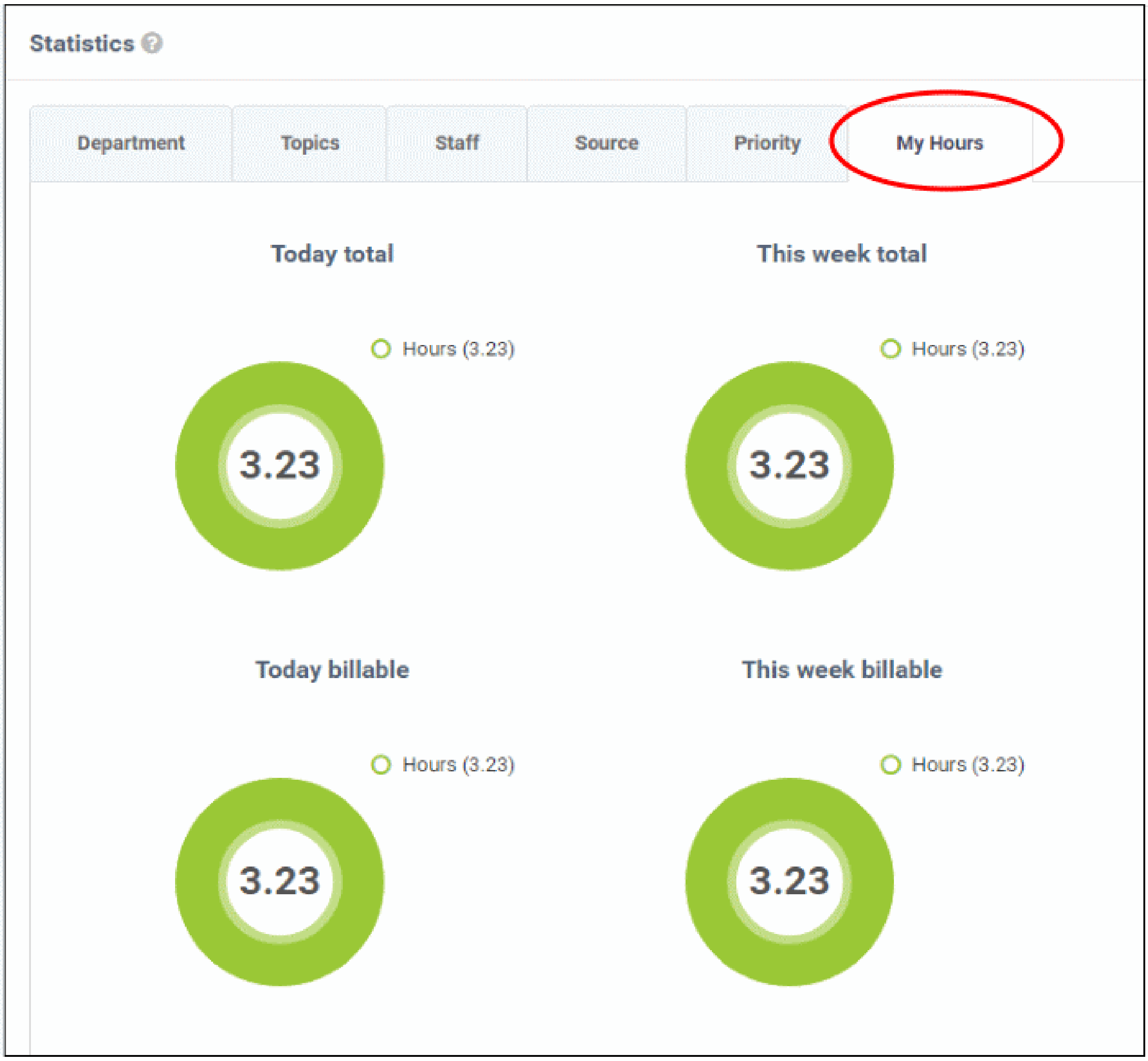
Statistics

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.



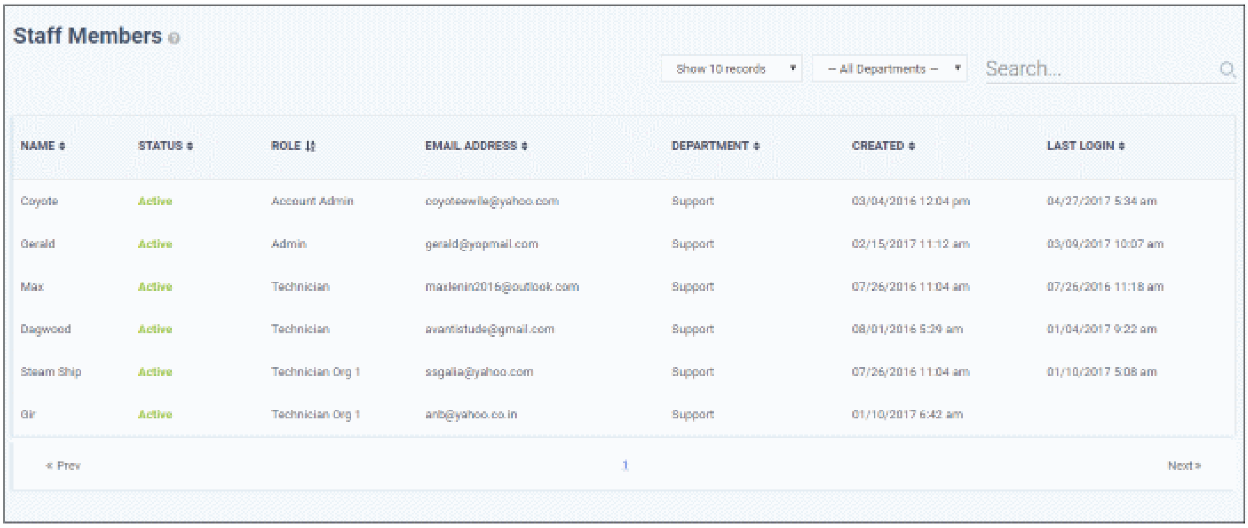
Exporting Statistics to a CSV file

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.

3.1.2 View Staff Members

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

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



Staff Members

Show 10 records | – All Departments – | Search...

NAME	STATUS	ROLE	EMAIL ADDRESS	DEPARTMENT	CREATED	LAST LOGIN
Coyote	Active	Account Admin	coyoteewile@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	maxlenin2016@outlook.com	Support	07/26/2016 11:04 am	07/26/2016 11:18 am
Dagwood	Active	Technician	avantistude@gmail.com	Support	08/01/2016 5:29 am	01/04/2017 9:22 am
Steam Ship	Active	Technician Org 1	ssgalia@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

- 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

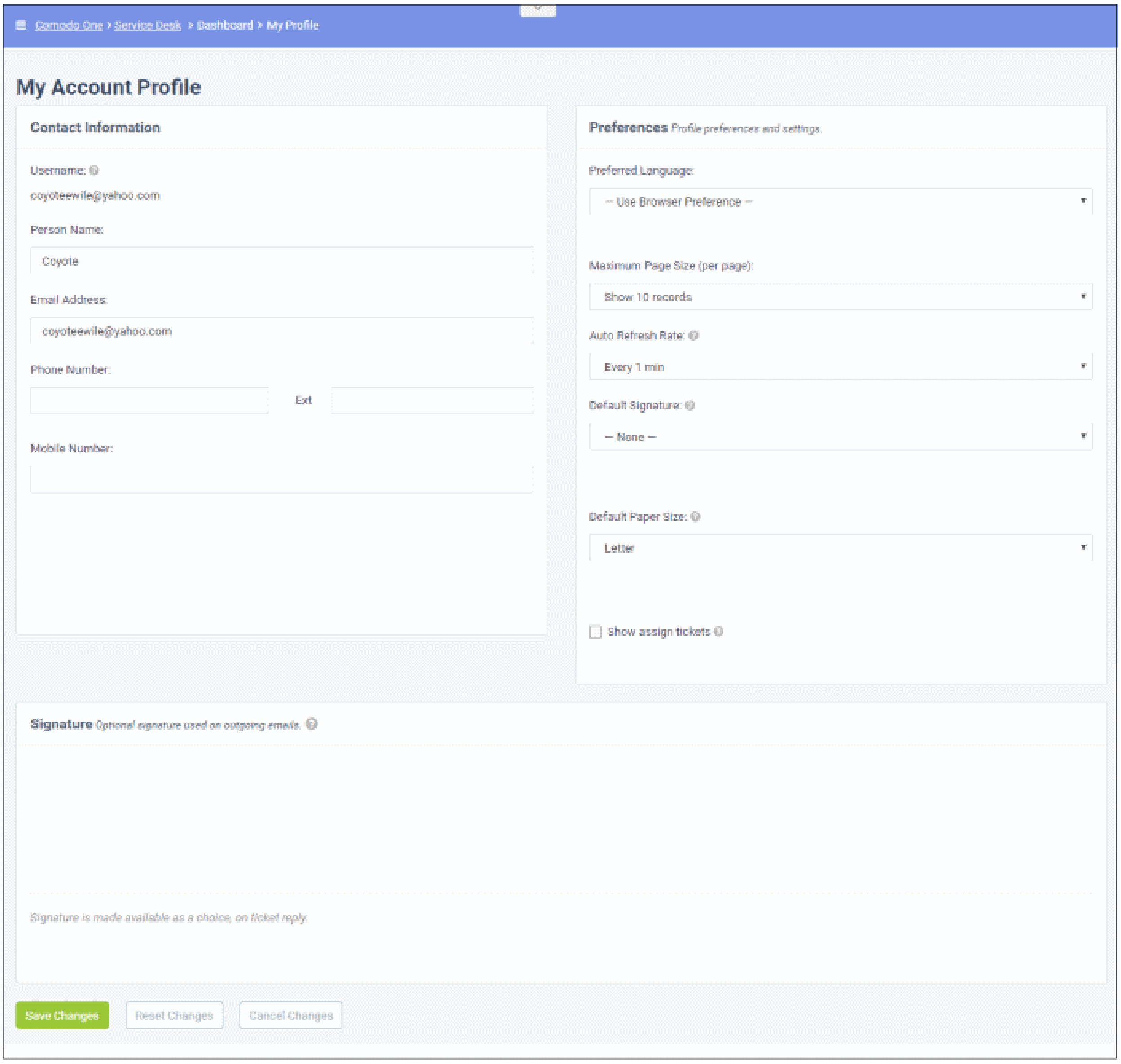
- **Name:** The name of the staff member.
- **Status:** Indicates whether the staff member is active or inactive
- **Role:** Staff roles determine the permissions they have within the service desk console. Roles are configured by admins in 'Admin Panel' > 'Staff' > 'Roles'.
- **Email Address:** Email 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.

3.1.3 My Profile

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

- Click 'Staff Panel' > 'Dashboard' > 'My Profile' to open this page.



Contact Information

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

Preferences

- **Preferred Language:** Select the language which will be used in the interface.
- **Maximum Page Size:** Number of records that should be shown per page. For example, the number of tickets that should be shown per page. If 'system default' is selected, then the settings chosen by the administrator will take effect. See **C1 Service Desk System Settings** for more details.
- **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.

Tip: Administrators can set a signature messages for responses from different department from the 'Admin Panel', through 'Staff' tab > 'Departments'. See **Departments** for more details. Staff members can also change the signature in tickets screen.

- **Default Paper Size:** Set 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.

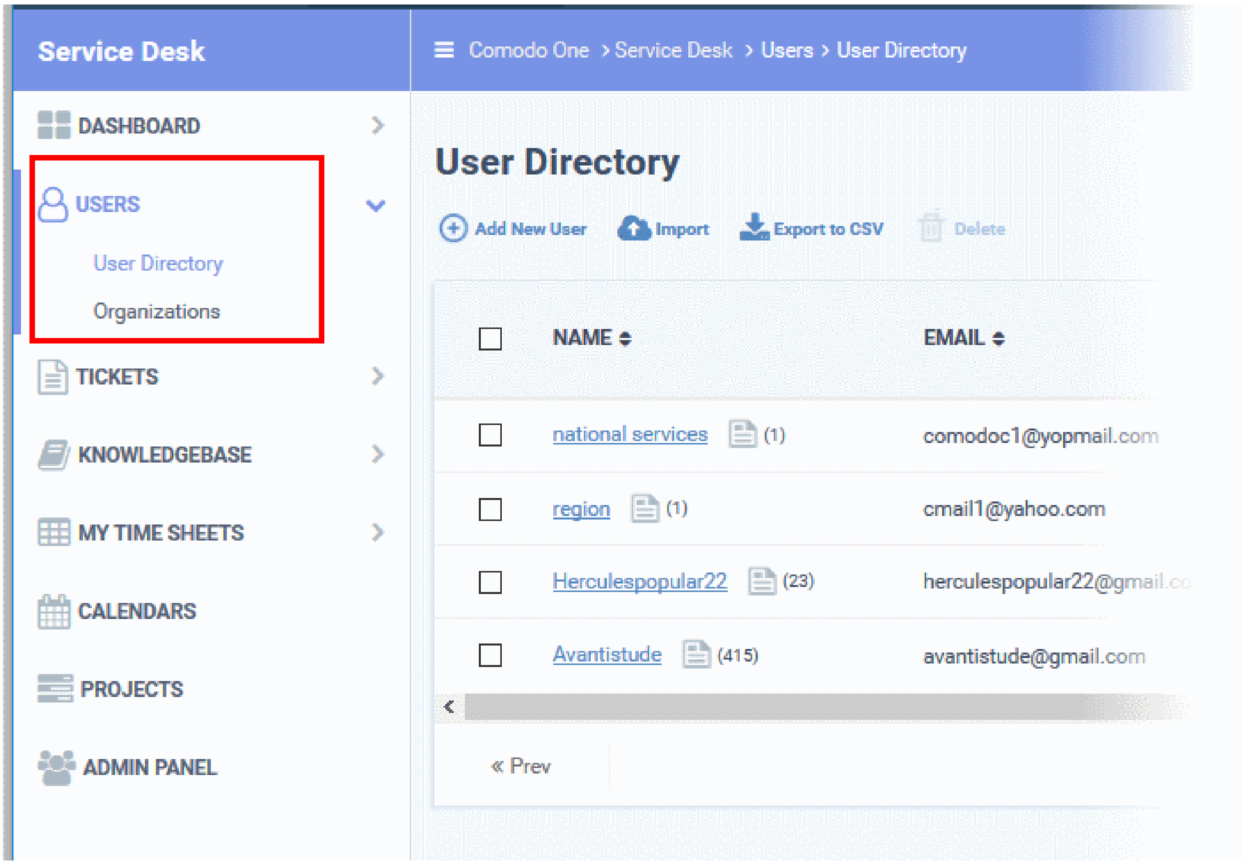
Signature

- 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.

3.2 Manage Users and Organizations

- Click 'Staff Panel' > 'Users' to open the users area
- 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 the links below for more details:

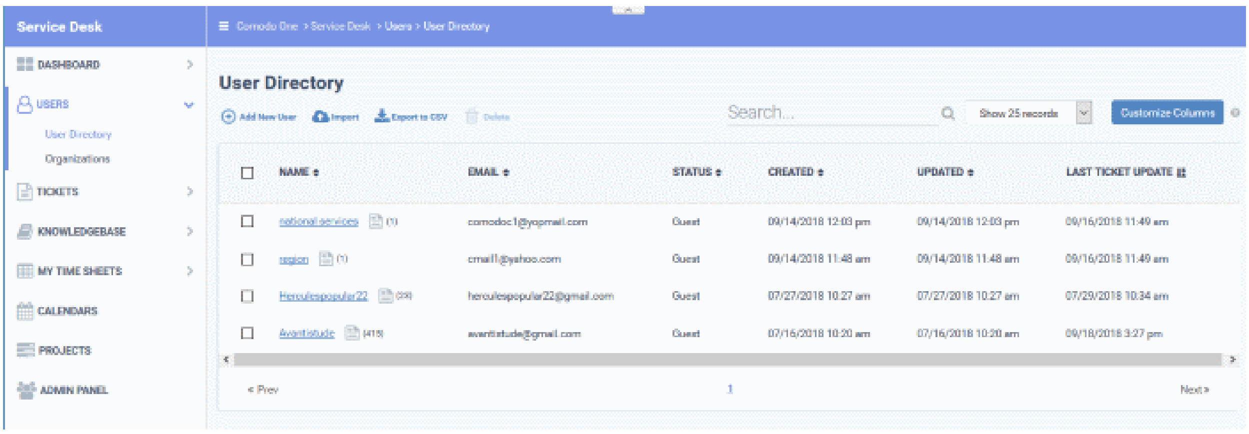
- **Managing Users**
- **Managing Organizations**

3.2.1 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. You must also have allowed login abilities in **Access Control Settings** ('Admin Panel' > 'Settings' > 'Access Control Settings')
    - 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.



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 all 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 Options

- The 'Search' field lets you filter users by name, email address or phone number. Start typing your search term to see a list of suggestions.
- Clear the search field to return to the all-user view (or simply click the 'User Directory' link on the left).

Add Users

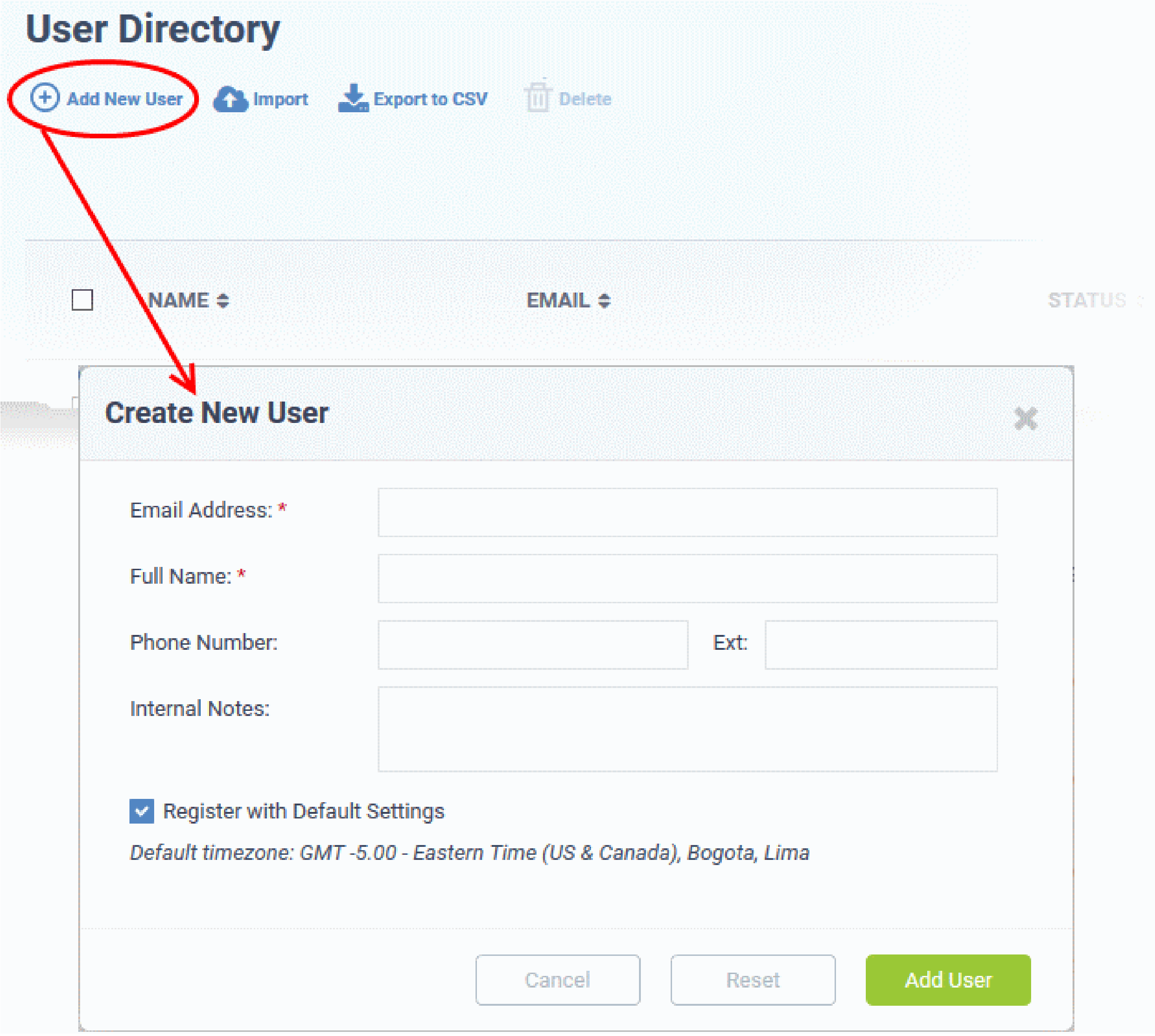
- Users can be added manually or imported from a list
- A non-registered user that raises a ticket in the support center will also be added as a guest user.
- You can create new support tickets on behalf of new users. The user will be automatically added as guest user to Service Desk
- Guest users can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

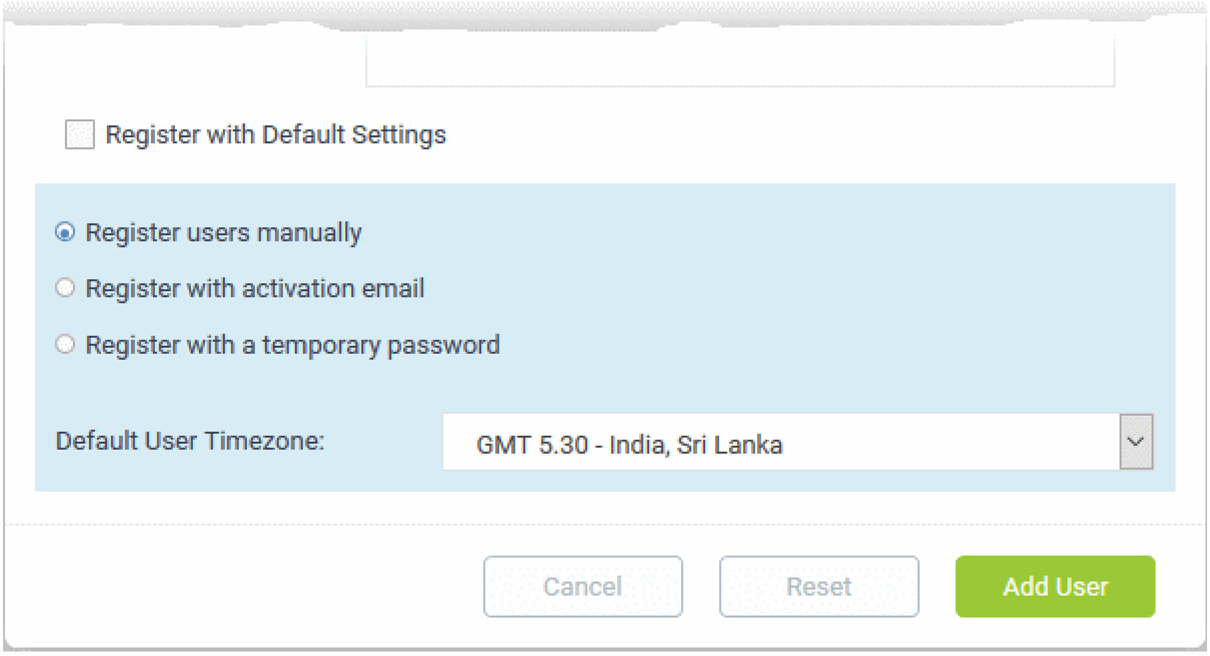
- Open the 'Staff Panel' if it isn't open already (last link in the left-hand menu)
- Click 'Users'
- Click the 'Add New User' link at the top



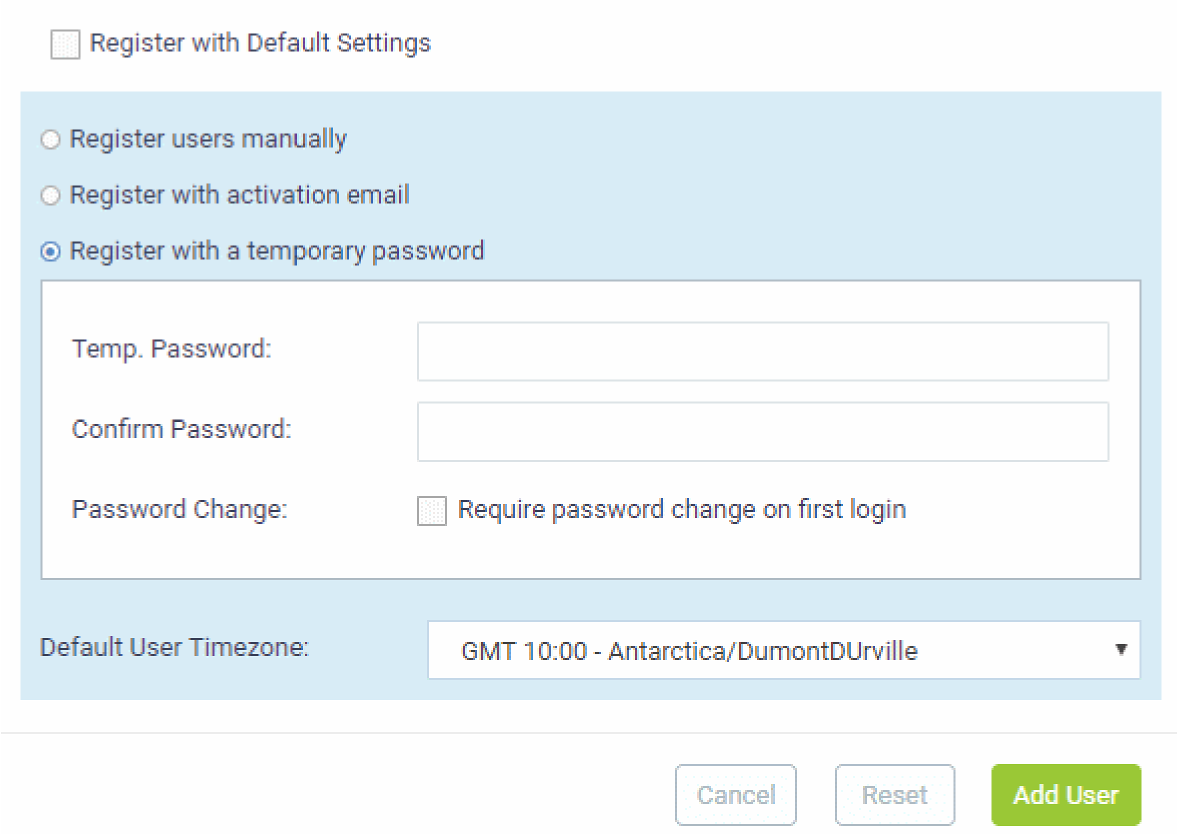
The 'Create New User' screen will open:

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'
  - Leave selected if you want to use the default settings.
  - Deselect to choose a different registration method.
  - See **User Registration Settings** if you need more help with this.



- **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)



- 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.

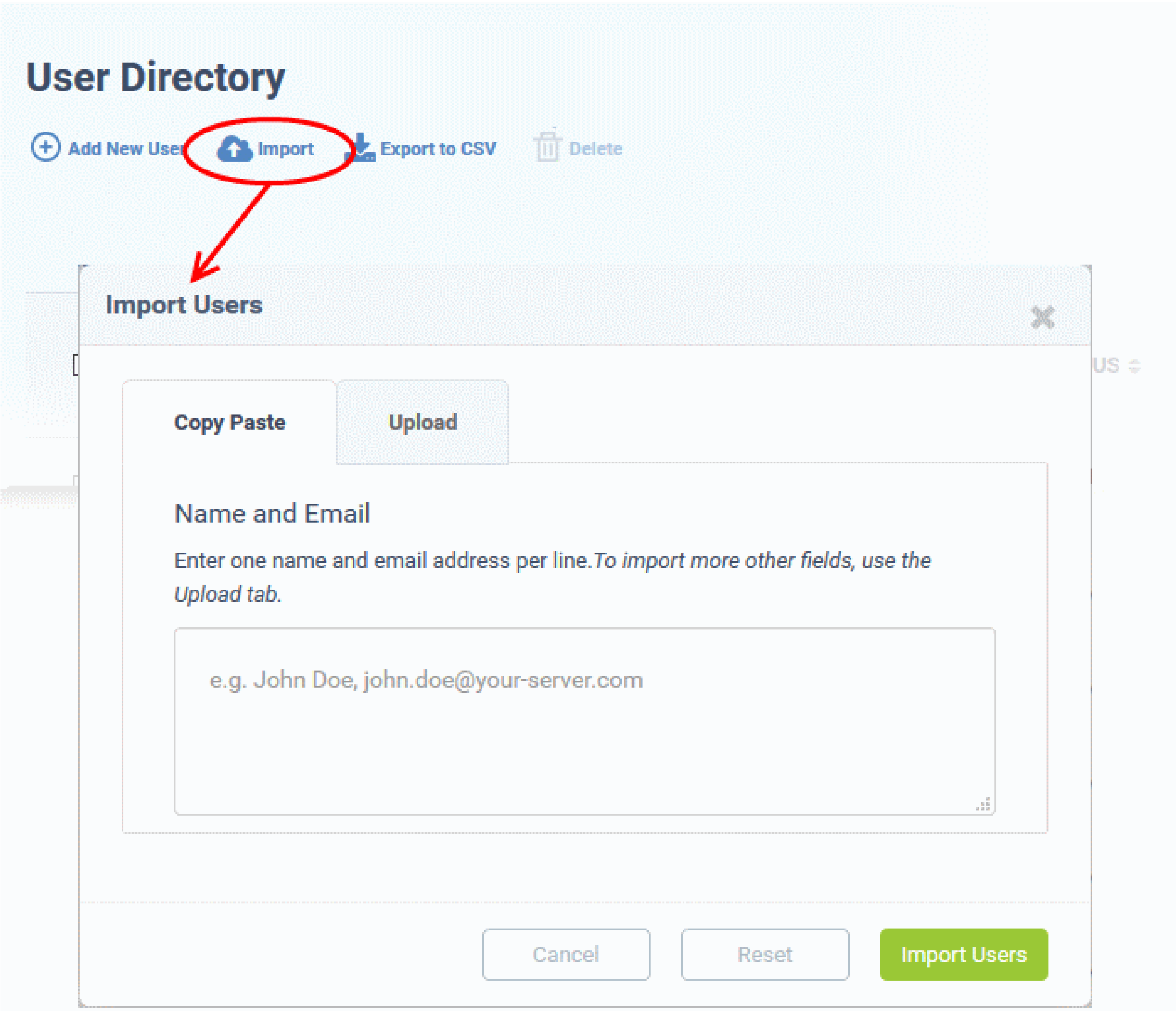
- **Default User Timezone** - Select the time zone to which the user belongs from the drop-down

- 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.

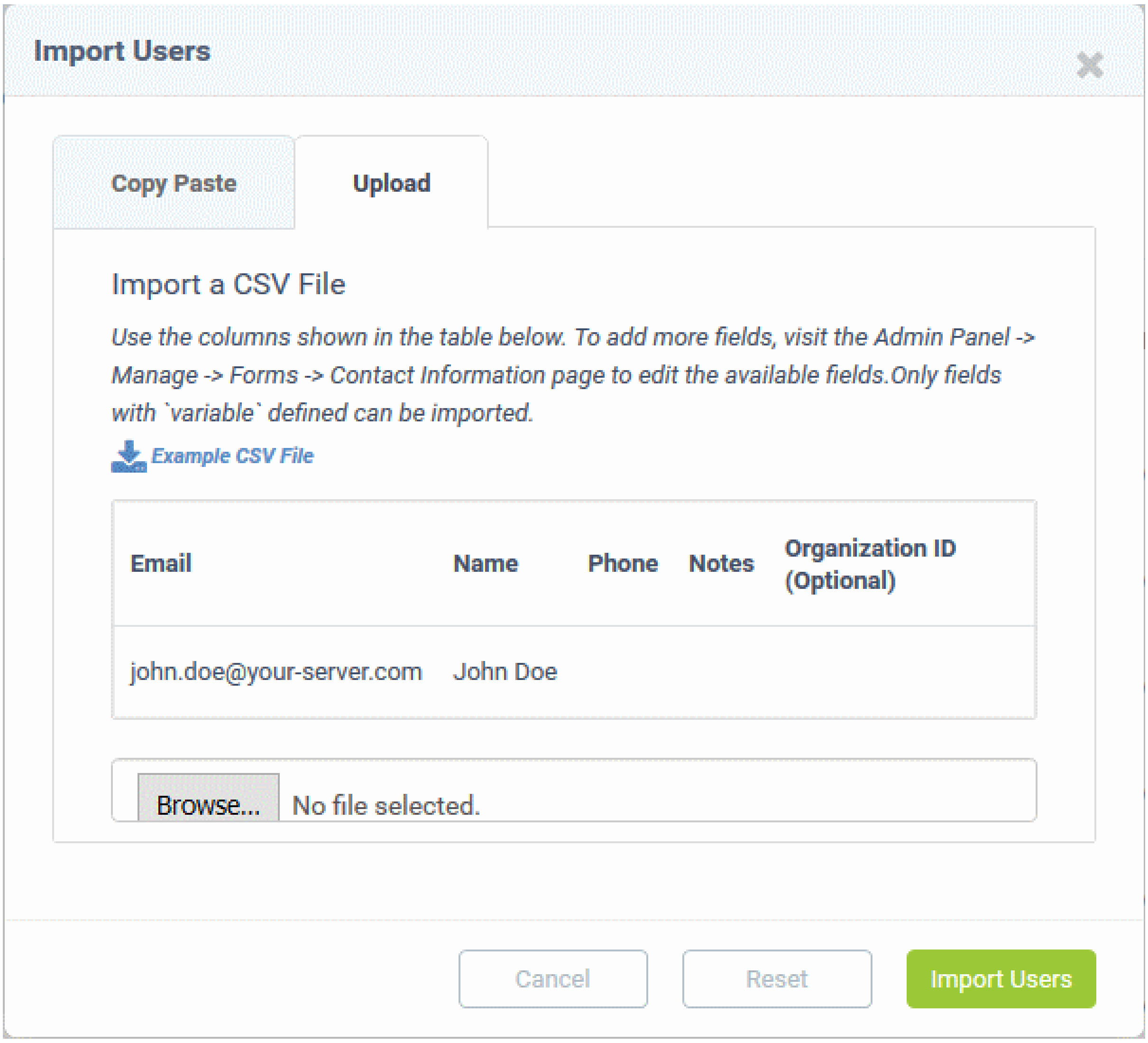
The 'Copy Paste' method allows you to import users with name and email details only.

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

Tip : Click the 'Example CSV File' to download a sample .csv file with fields to be filled-in for each line in the CSV file.

- 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.



- 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** for more details.

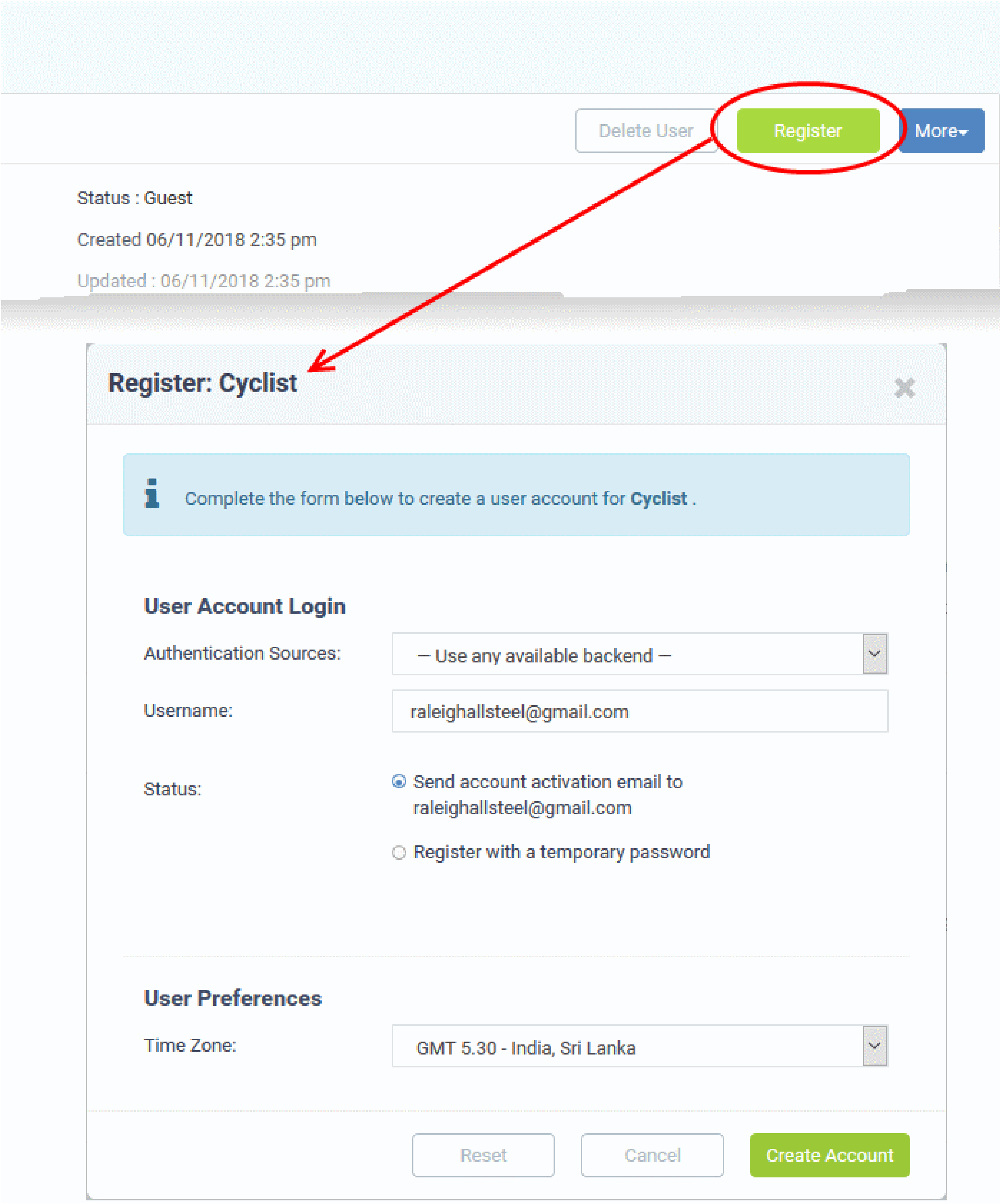
Register a user

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 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.

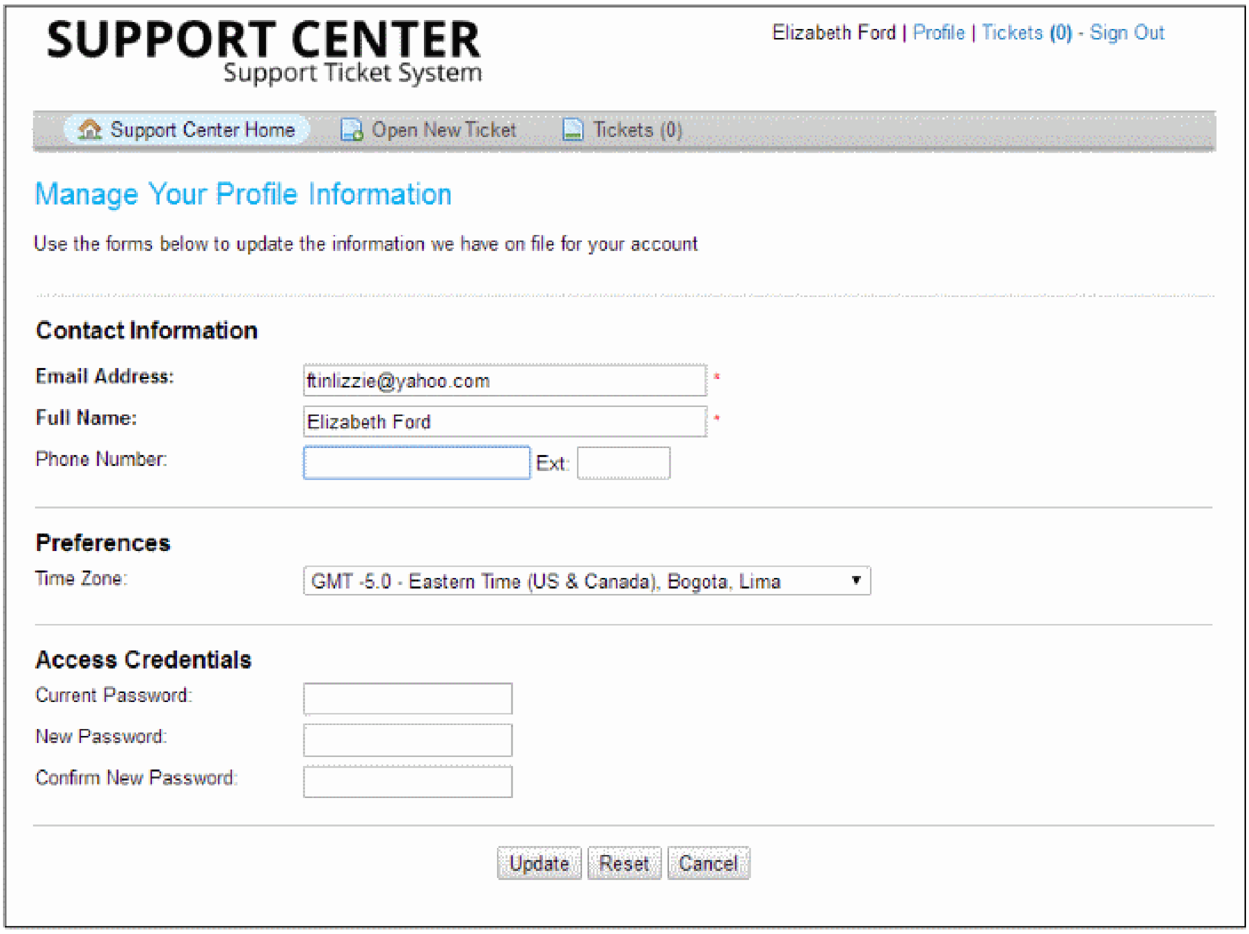
  Activation can be done in two ways:

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

User Account Activation through Activation Email

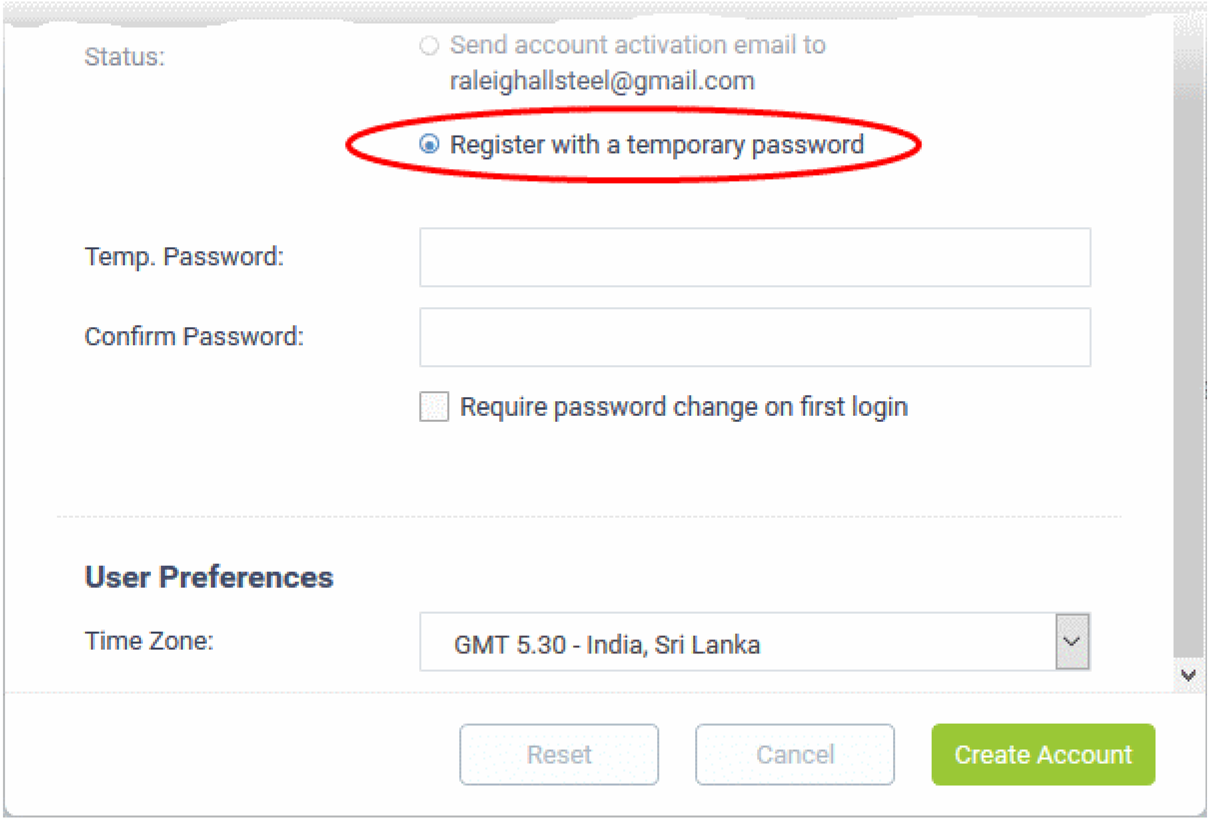
- Select 'Send account activation email...'
- Select the time zone to which the user belongs
- Click 'Create Account'

  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)'.



User Account Activation using a temporary password

- Select 'Register with a temporary password'



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

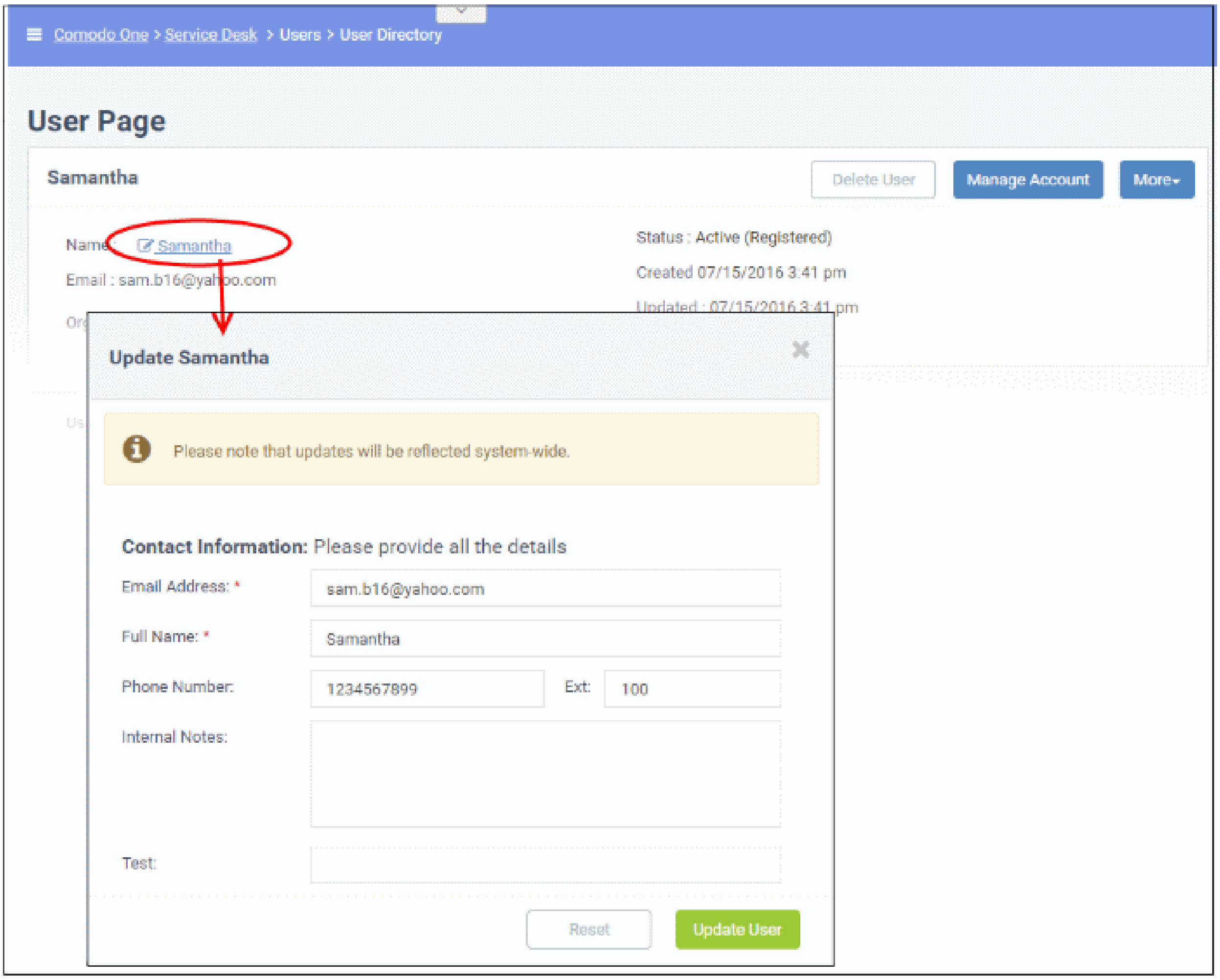
- Click 'Create Account'

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

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

Edit a user

- 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 '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.

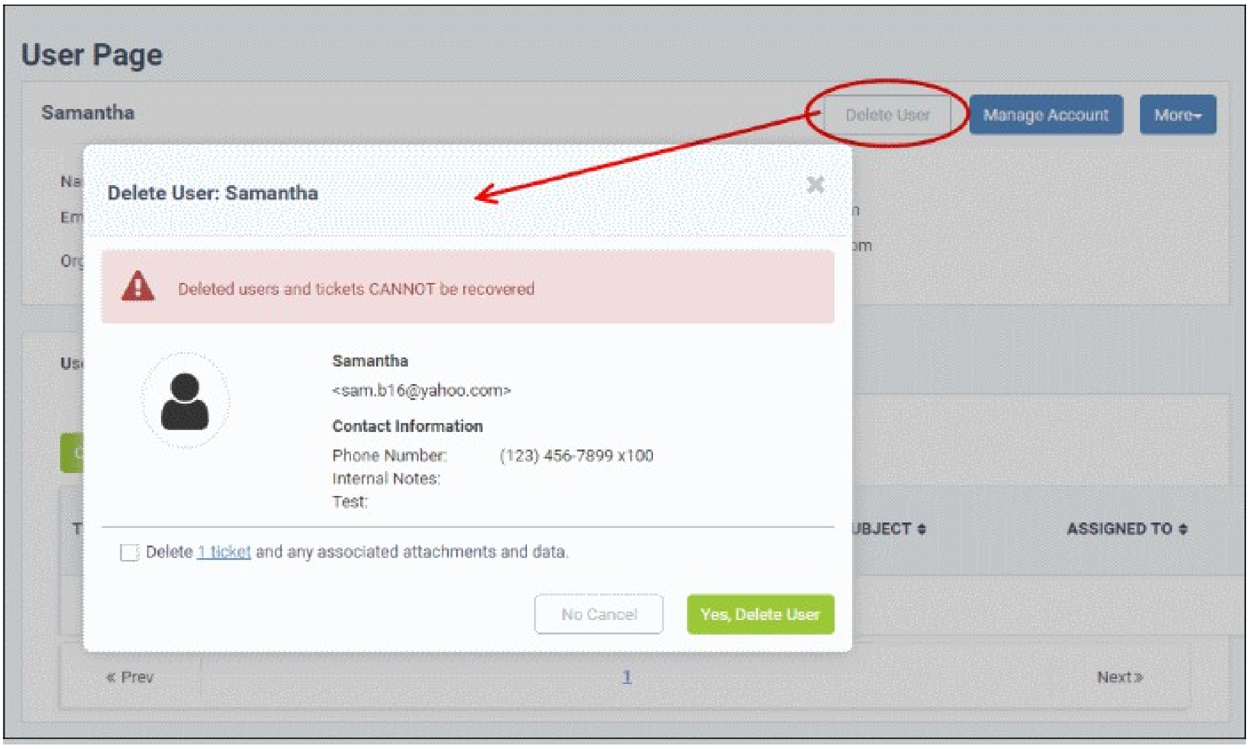
Delete a user

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.

Note: 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**.

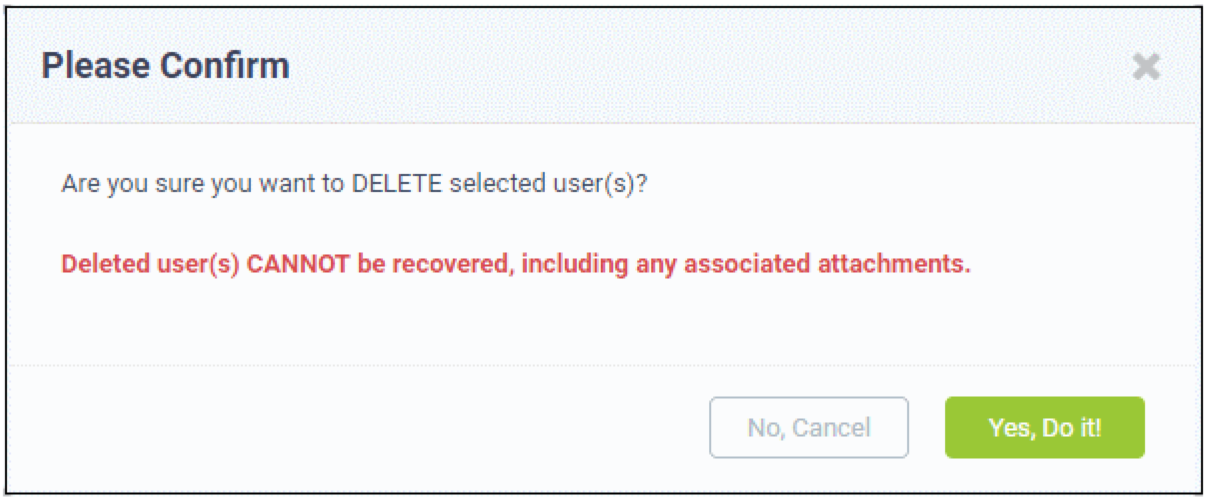
Note: You cannot remove a user who still has tickets associated with them.



- 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.

Warning: All tickets associated with removed users will also be automatically deleted.

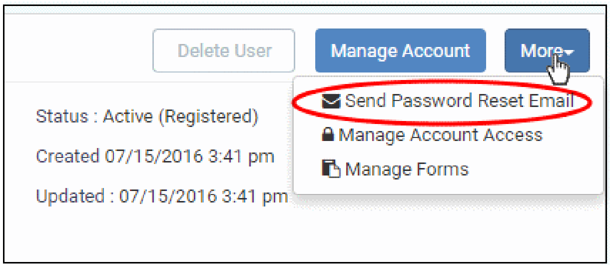
Send password reset / activation email to the user

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

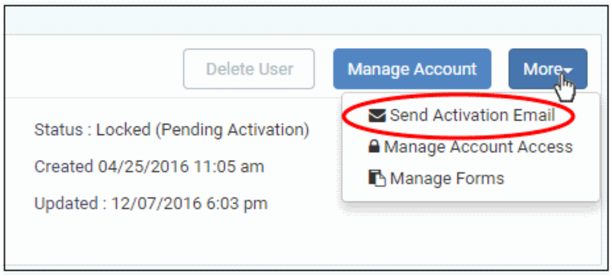
- Click 'Staff Panel' (if required) > 'Users' > 'User Directory'
- Click the name of the user whose password you wish to reset/to whom you wish to send an activation mail

- Click the 'More' button on the upper-right of the user details screen:

Registered Users

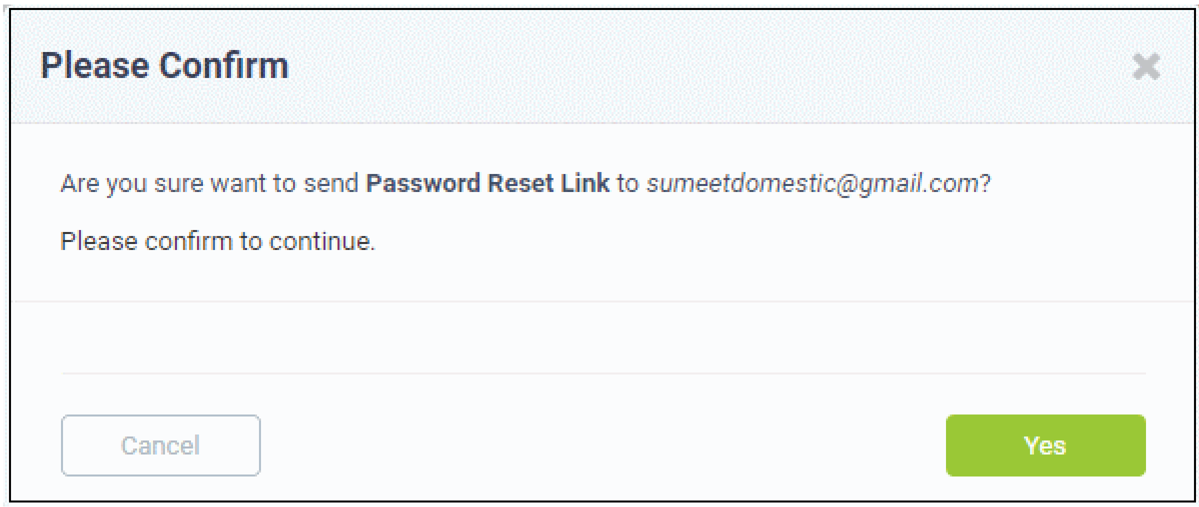


Locked (Pending Activation) Users



To reset a password

- Click the 'Send Password Reset Email' link

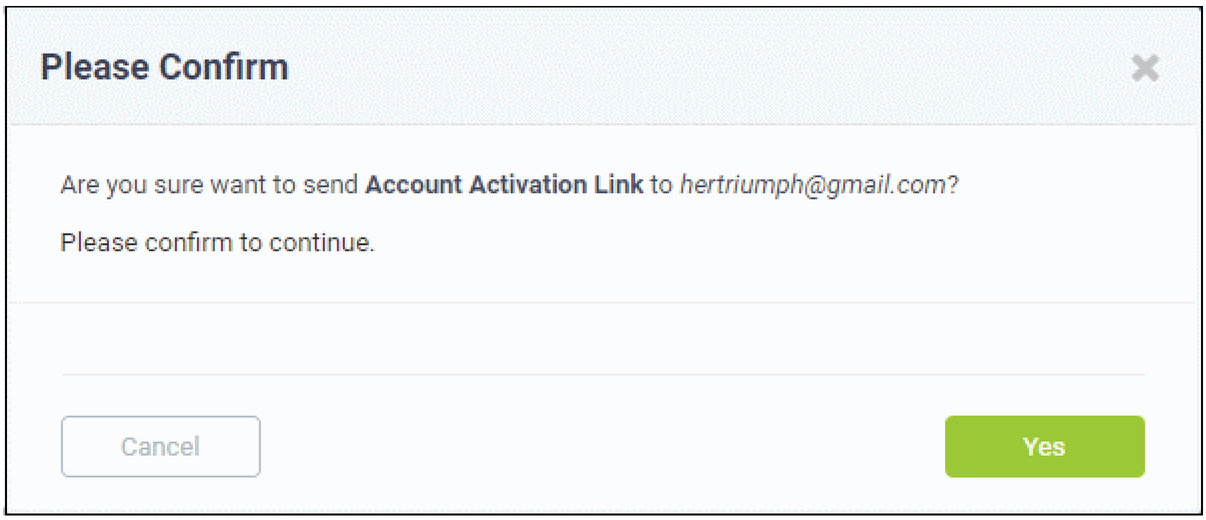


- Click 'Yes' to confirm sending the password reset email to the user.

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



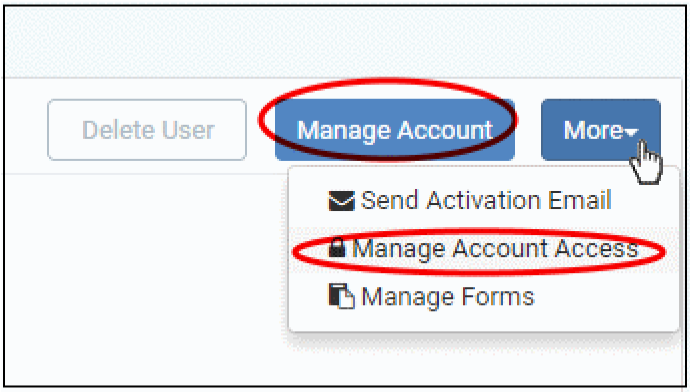
- Click 'Yes' to confirm and send the activation mail.

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)'.

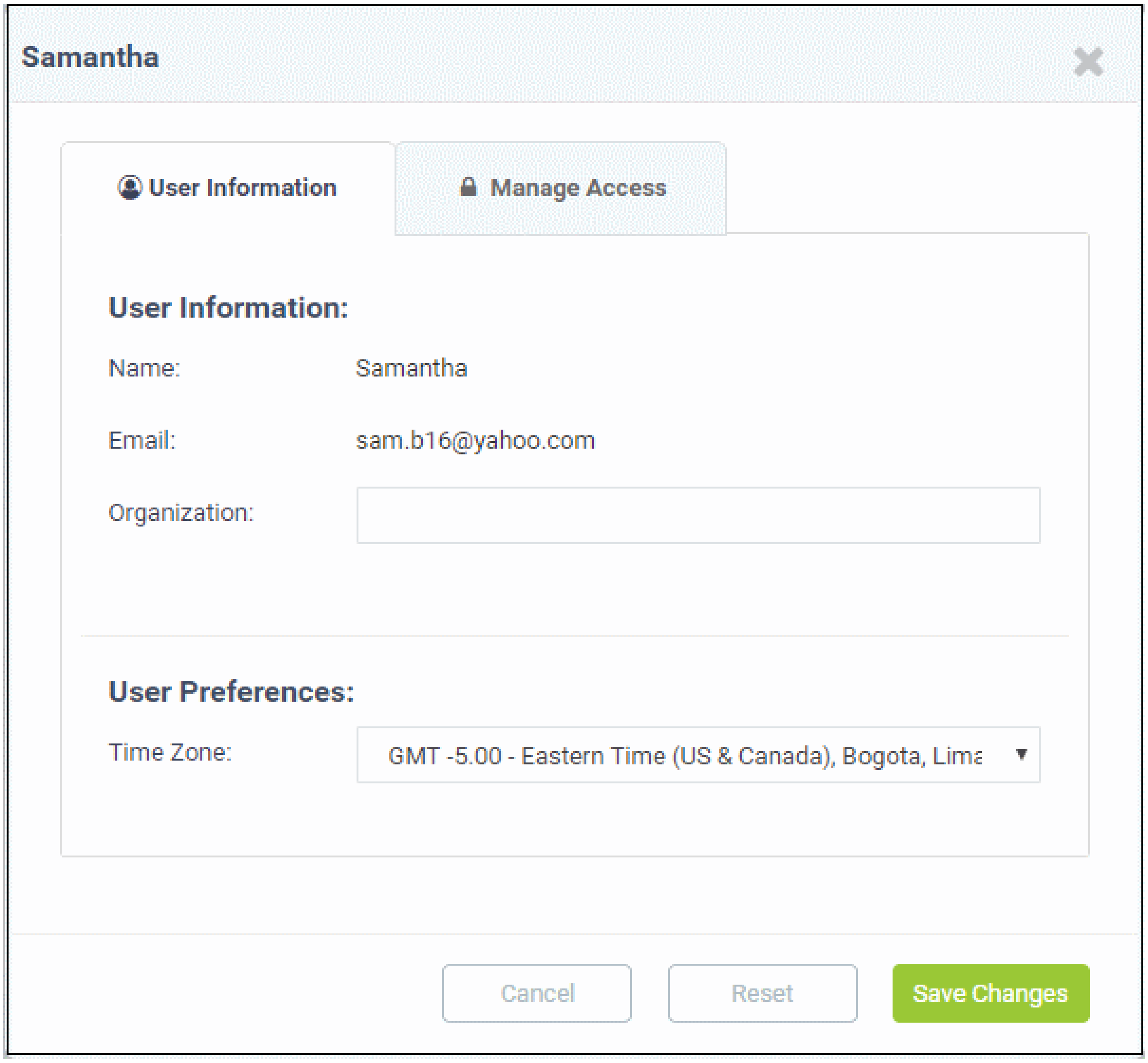
Manage account access / User Information

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

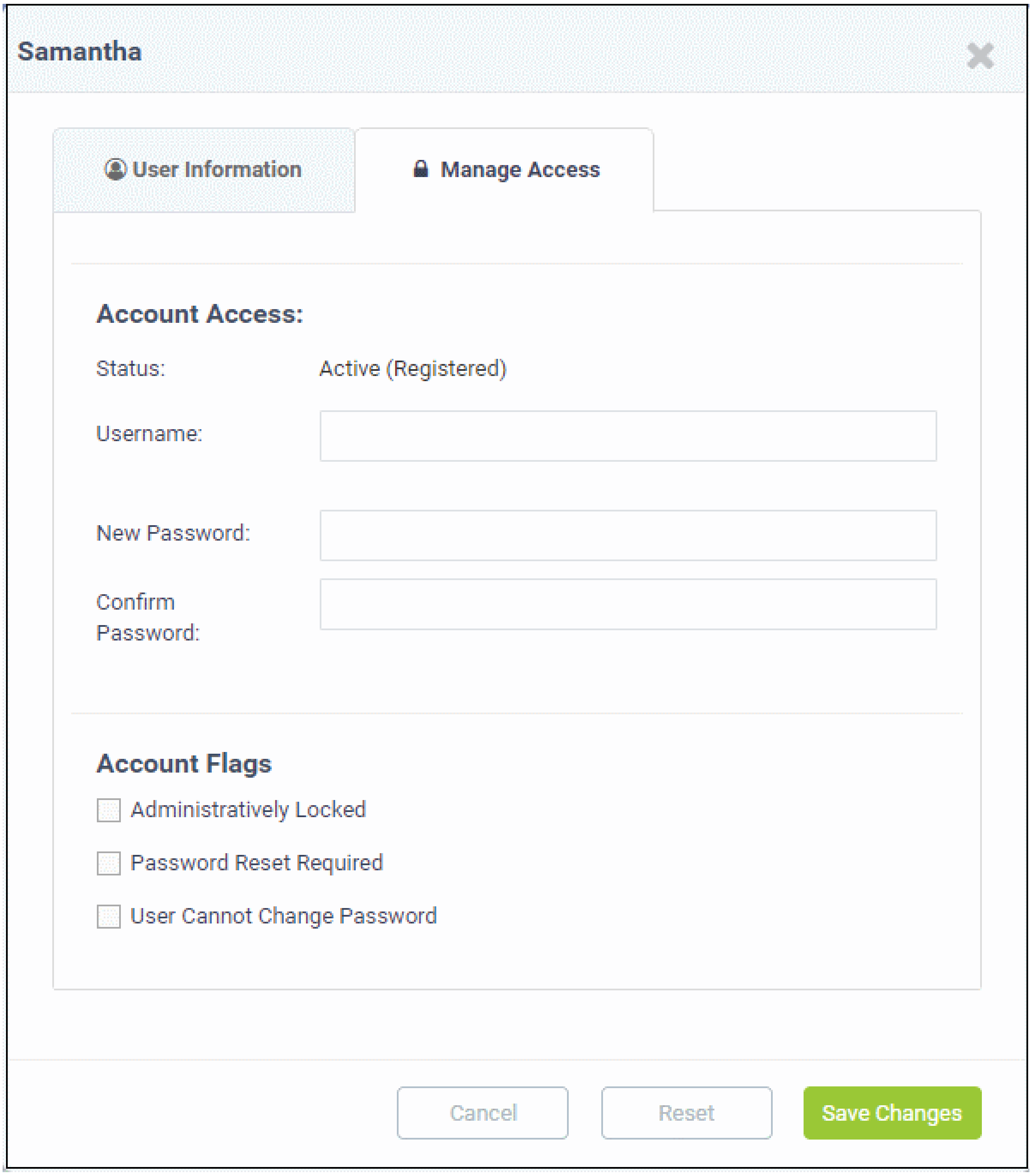
- To manage account access for a user, click their name then the 'More' button. Alternatively, click the 'Manage Account' button:



The 'User Information' tab allows staff members to change a user's Organization and time zone:



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



Account Access

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

Account Flags

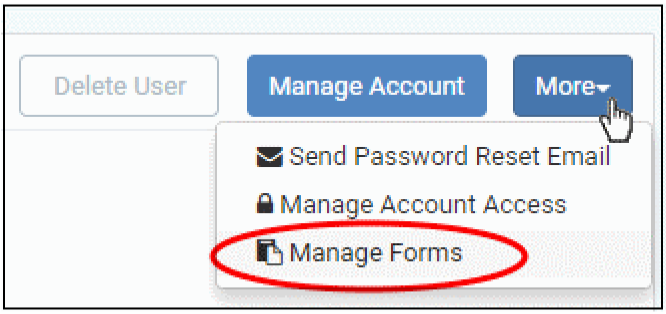
- **Administratively Locked:** If enabled, the user cannot access the web portal. However, the user can raise tickets via email.
- **Password Reset Required:** If enabled, a reset password screen will be displayed when the user logs into the web portal.
- **User Cannot Change Password:** If enabled,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

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

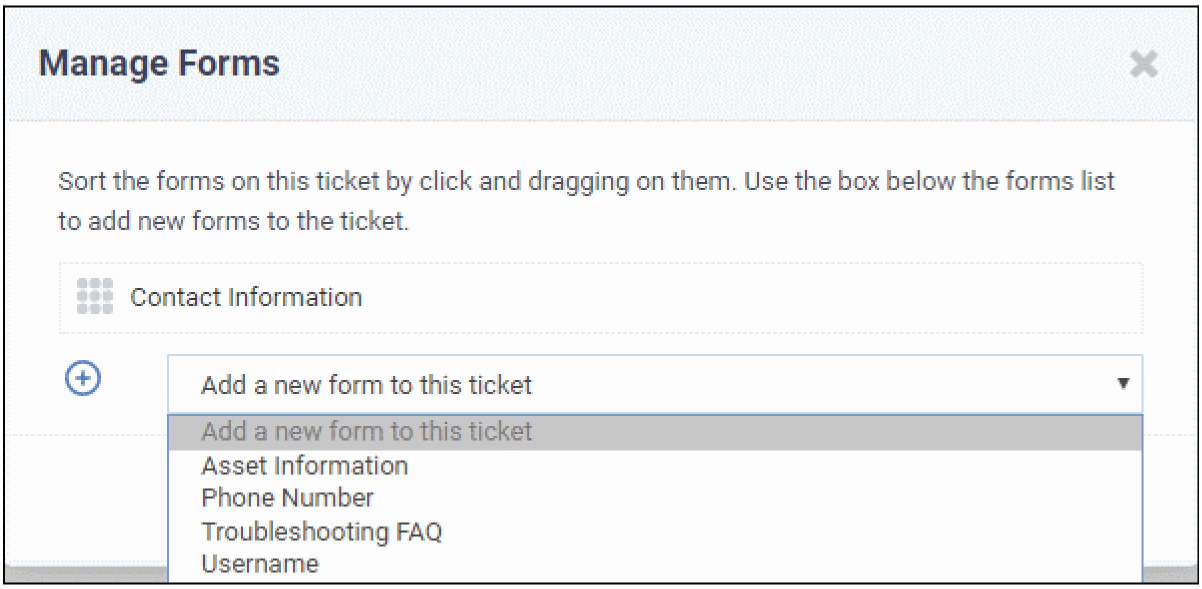
Add forms

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

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

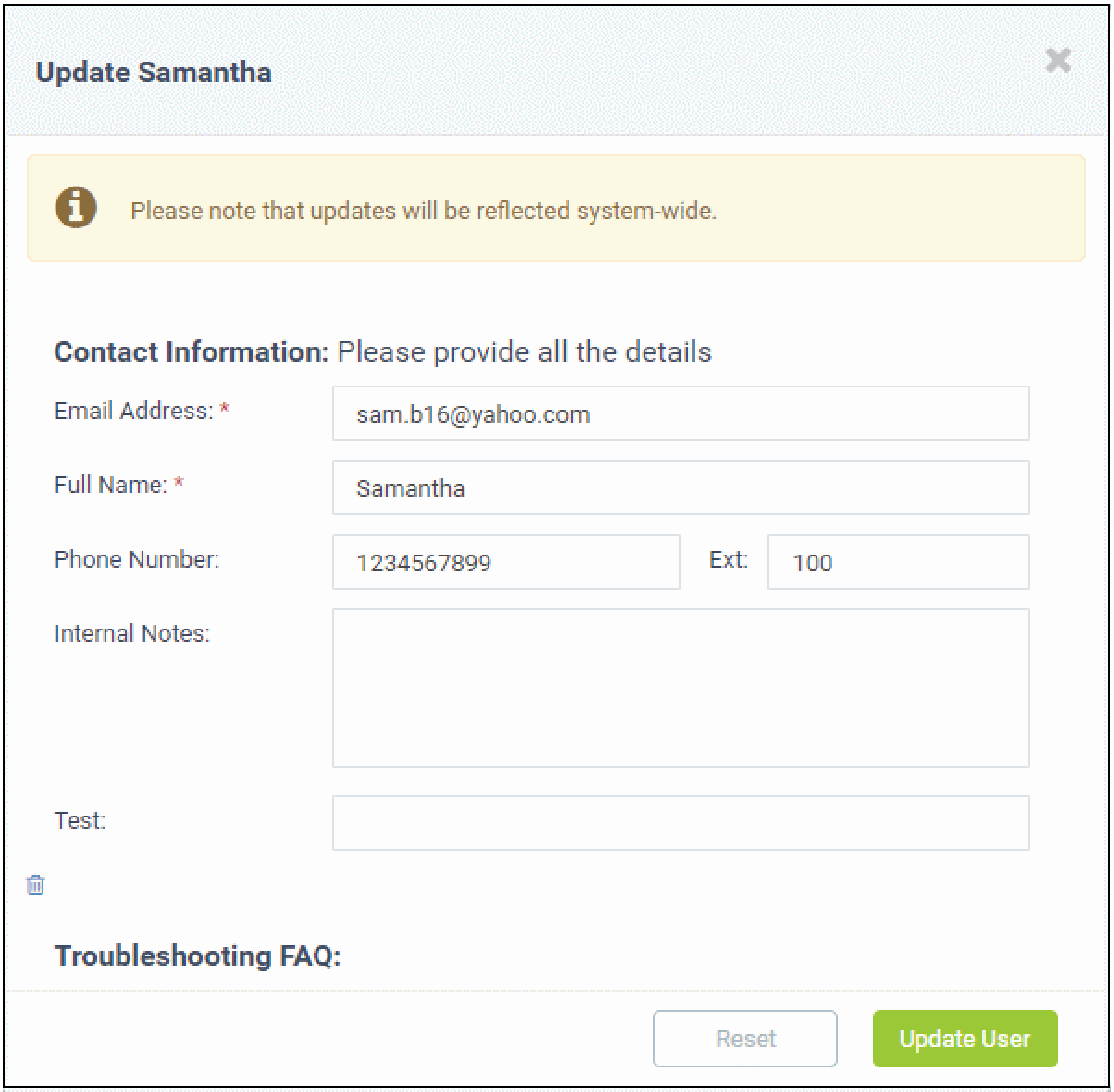


The 'Manage Forms' for the selected user screen will be displayed.

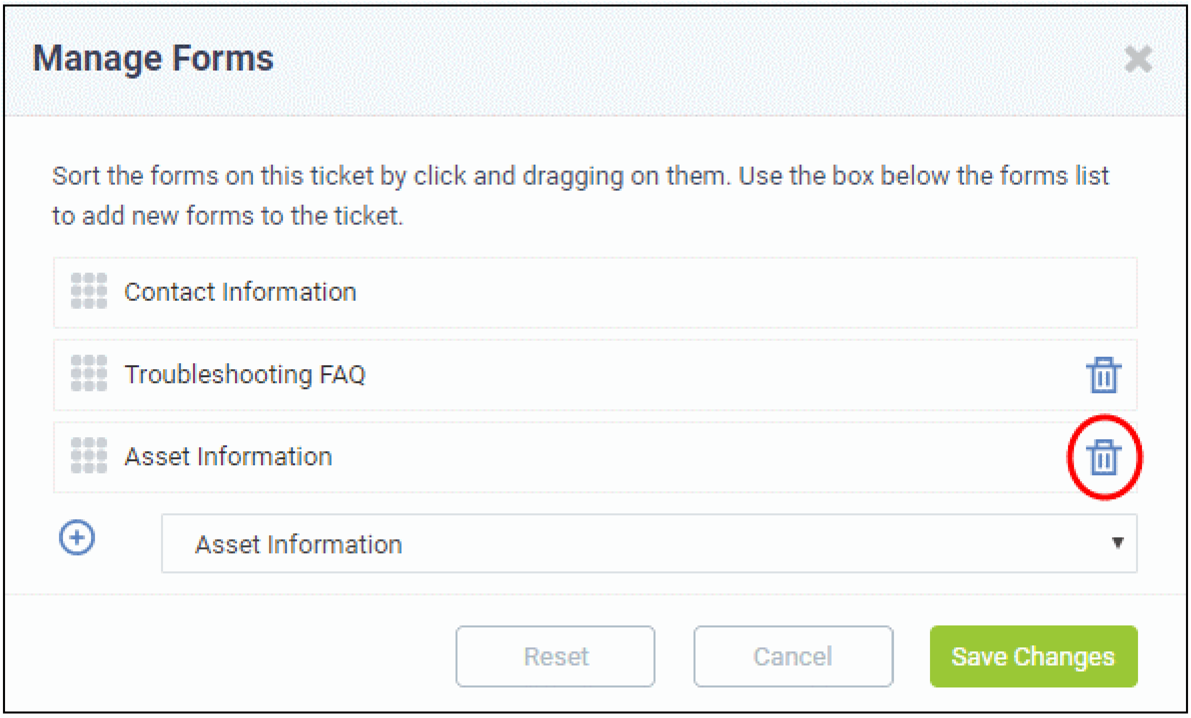


- Select the required form to be added for the user from the drop-down. The forms that are listed here can be configured in Admin Panel > Manage > Forms > Add Custom Form. See **Forms** for more details.
- Click the 'Save Changes' button.

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



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



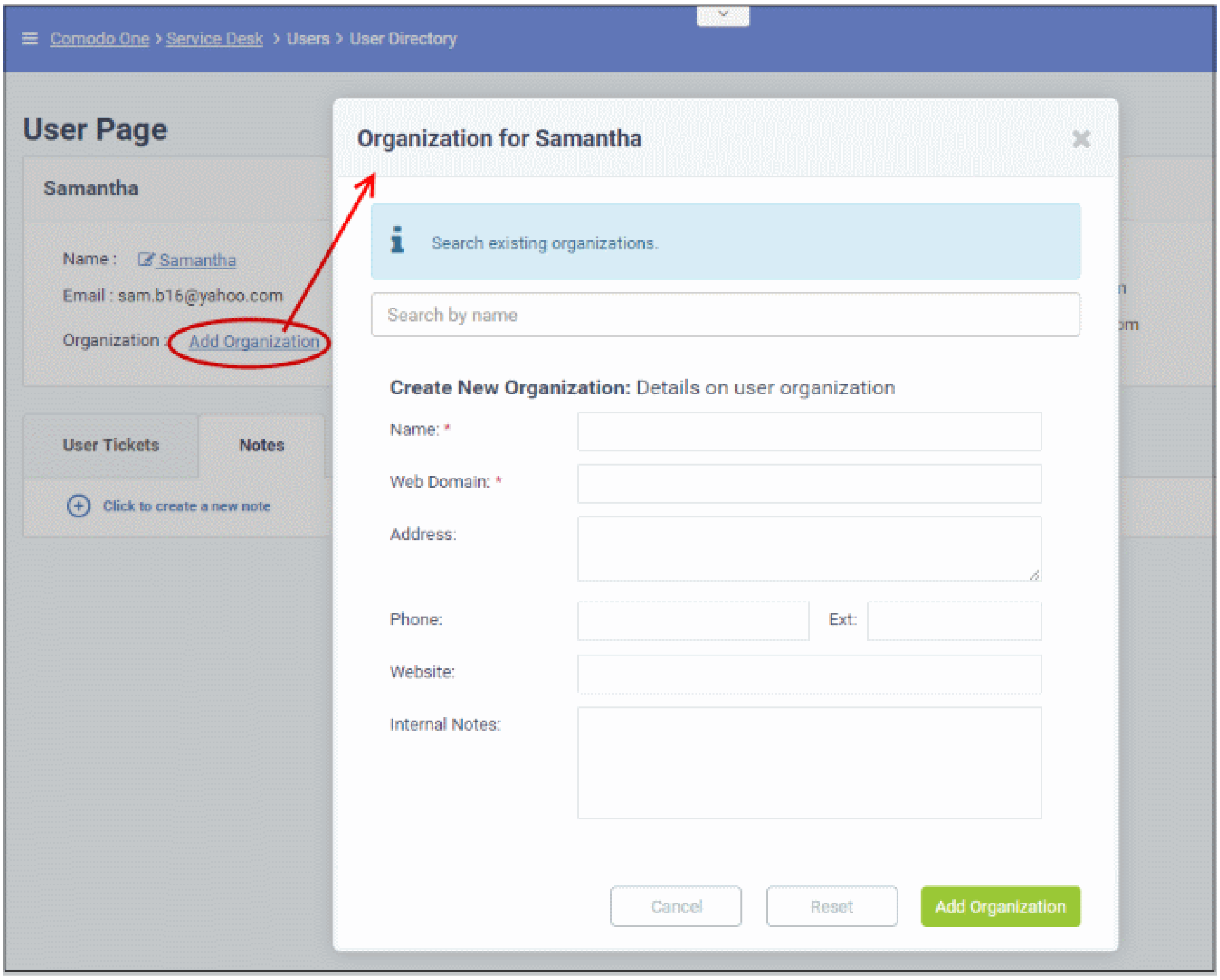
- Click the 'Save Changes' button at the bottom.

Add a user to 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.

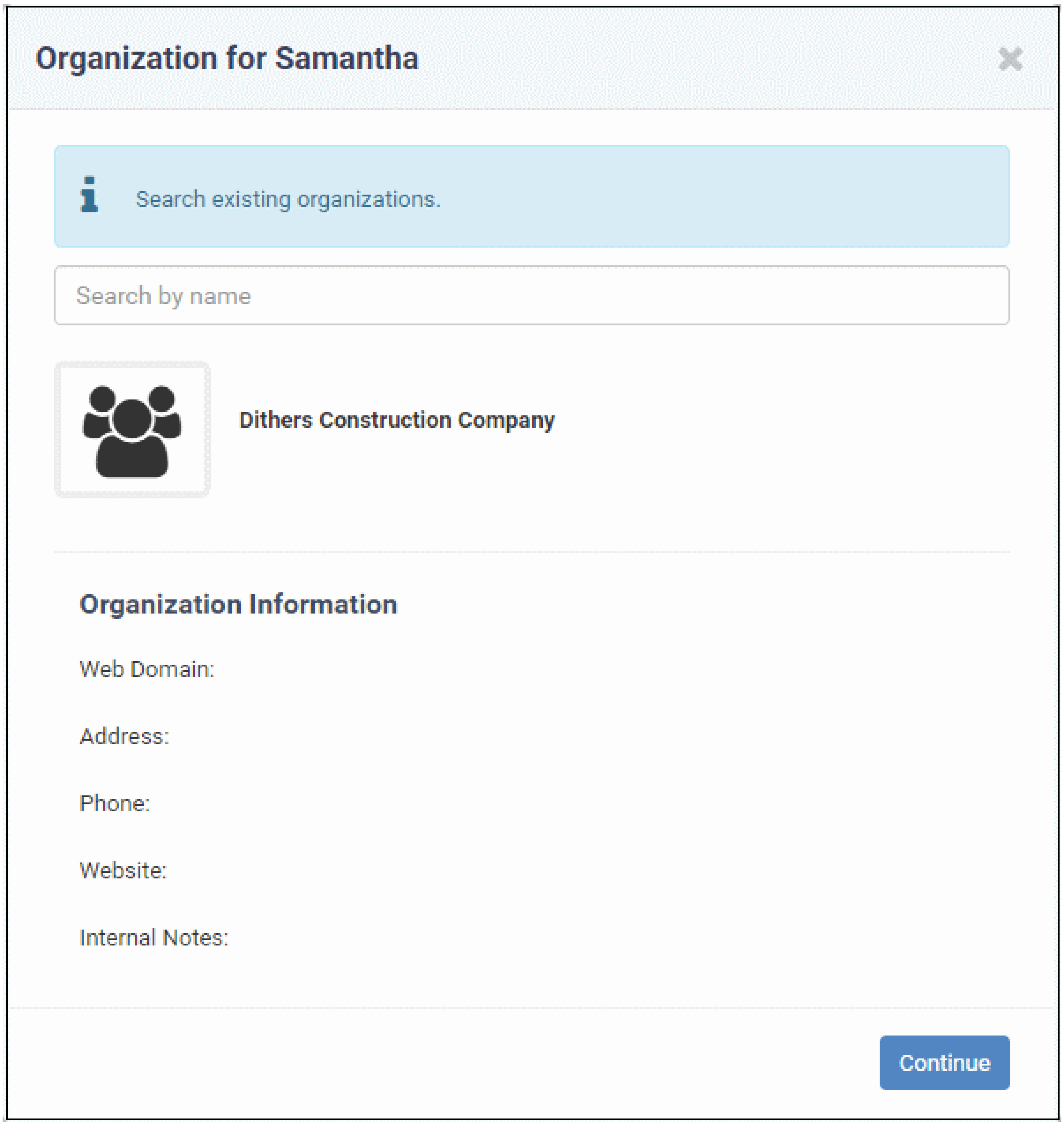
- To add a user to an organization, click their name in the 'User Page' interface, then click 'Add Organization'.



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.

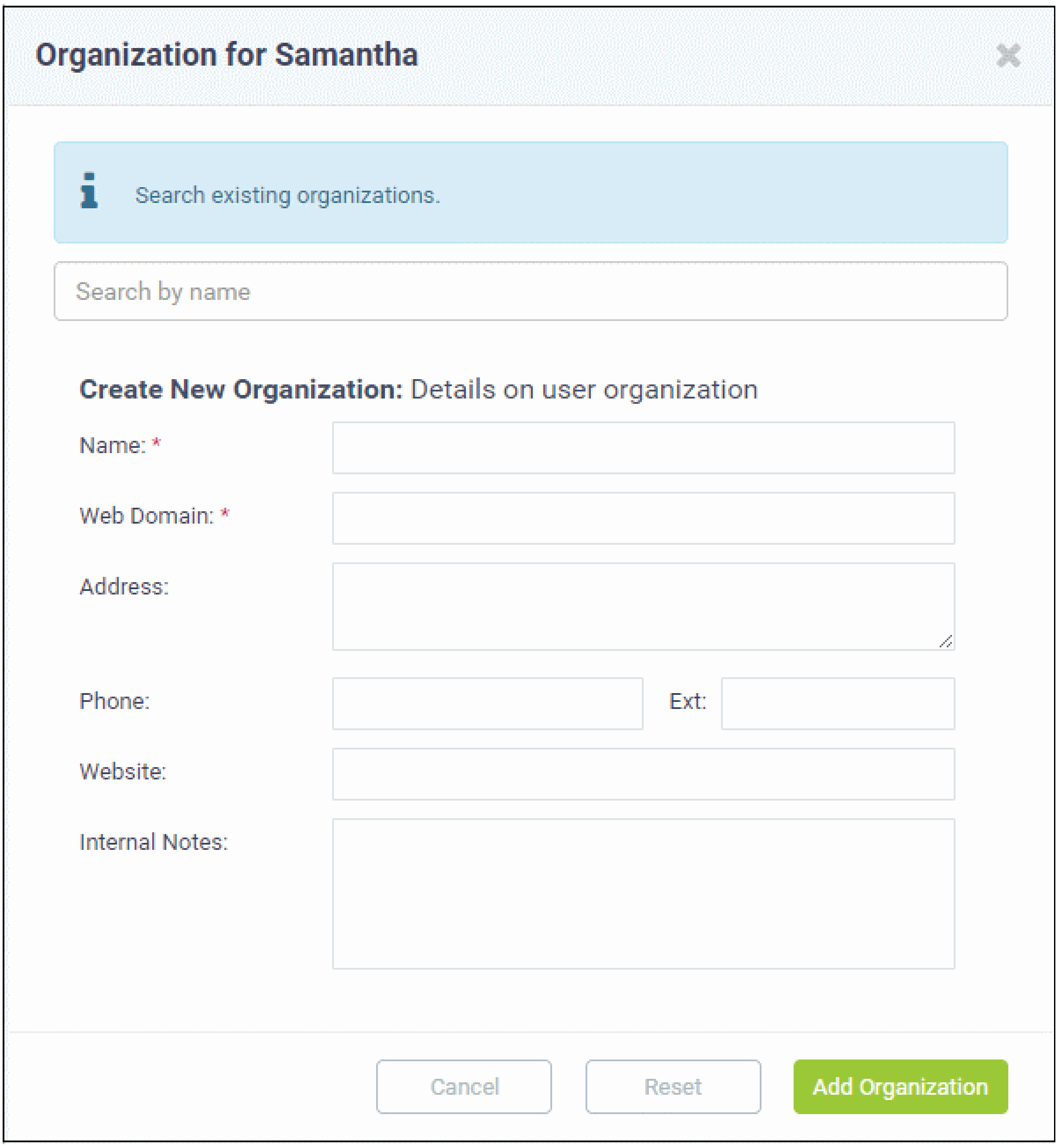
After choosing an Organization, the following confirmation dialog will appear:



- 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'.



See '**Managing Companies**' and '**Managing Organizations**' for more details about the details to be entered on adding a new organization.

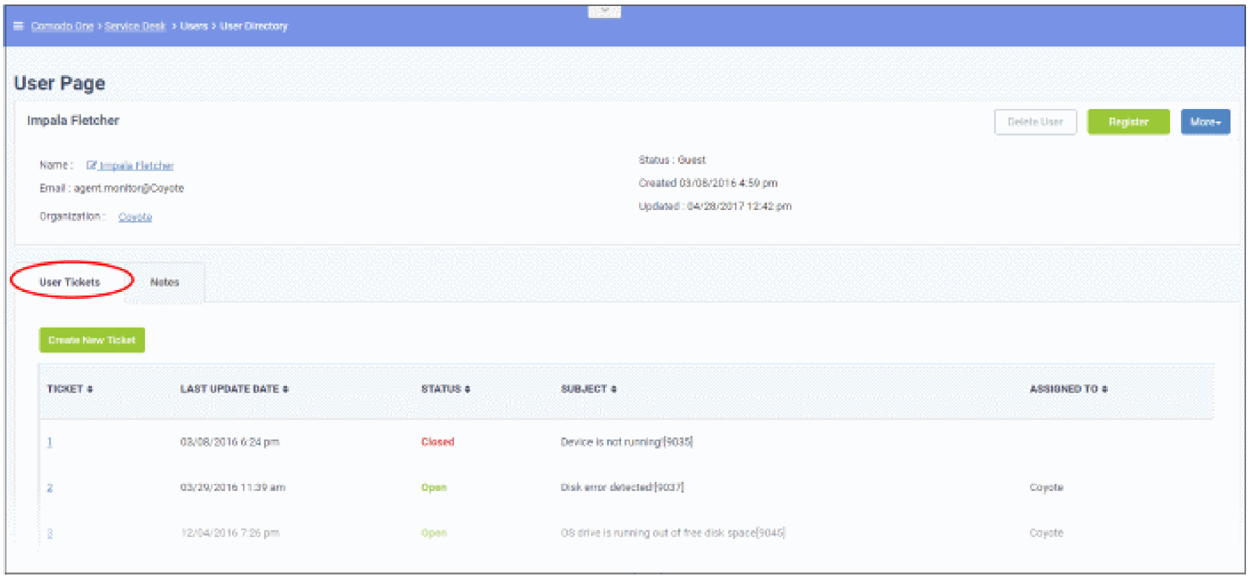
- Click 'Add Organization'

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.



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.

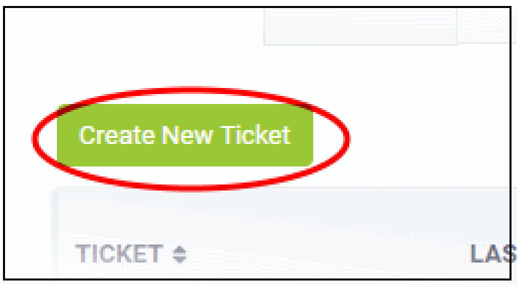
The ticket preview allows staff members to view the details and the links at the bottom to manage it. See '**Managing Tickets**' for more details.

Create new ticket on behalf of a user

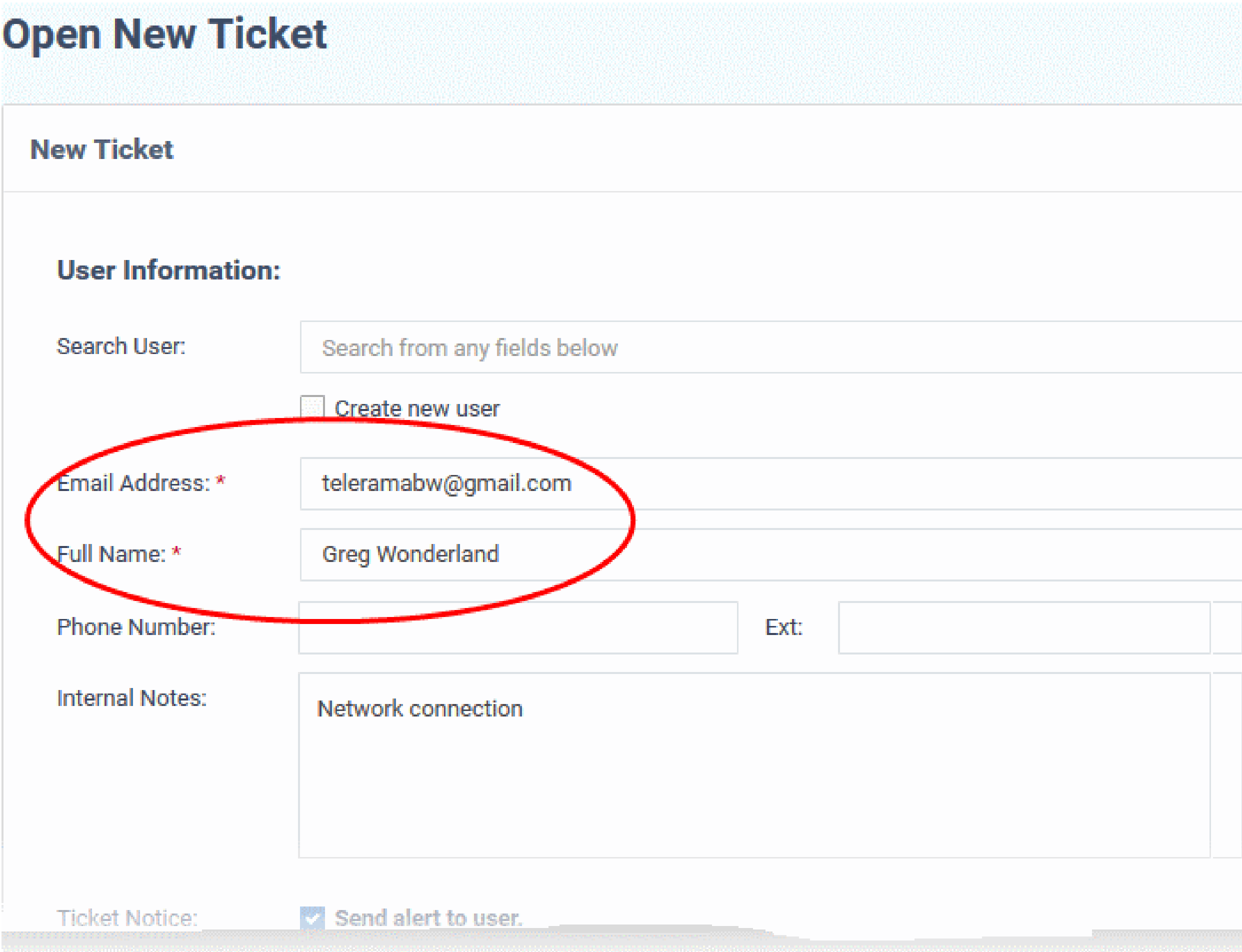
Users may contact staff over the phone about an issue. Afterwards, the staff member has the option to create a ticket on behalf of the user to track the issue.

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:



The interface is same as 'New Ticket' created by a staff member from the Tickets interface except the user name in this screen comes pre-selected. See '**Create a new ticket on behalf of a user**' in **Manage Tickets** for more details.

Export users list to a CSV file

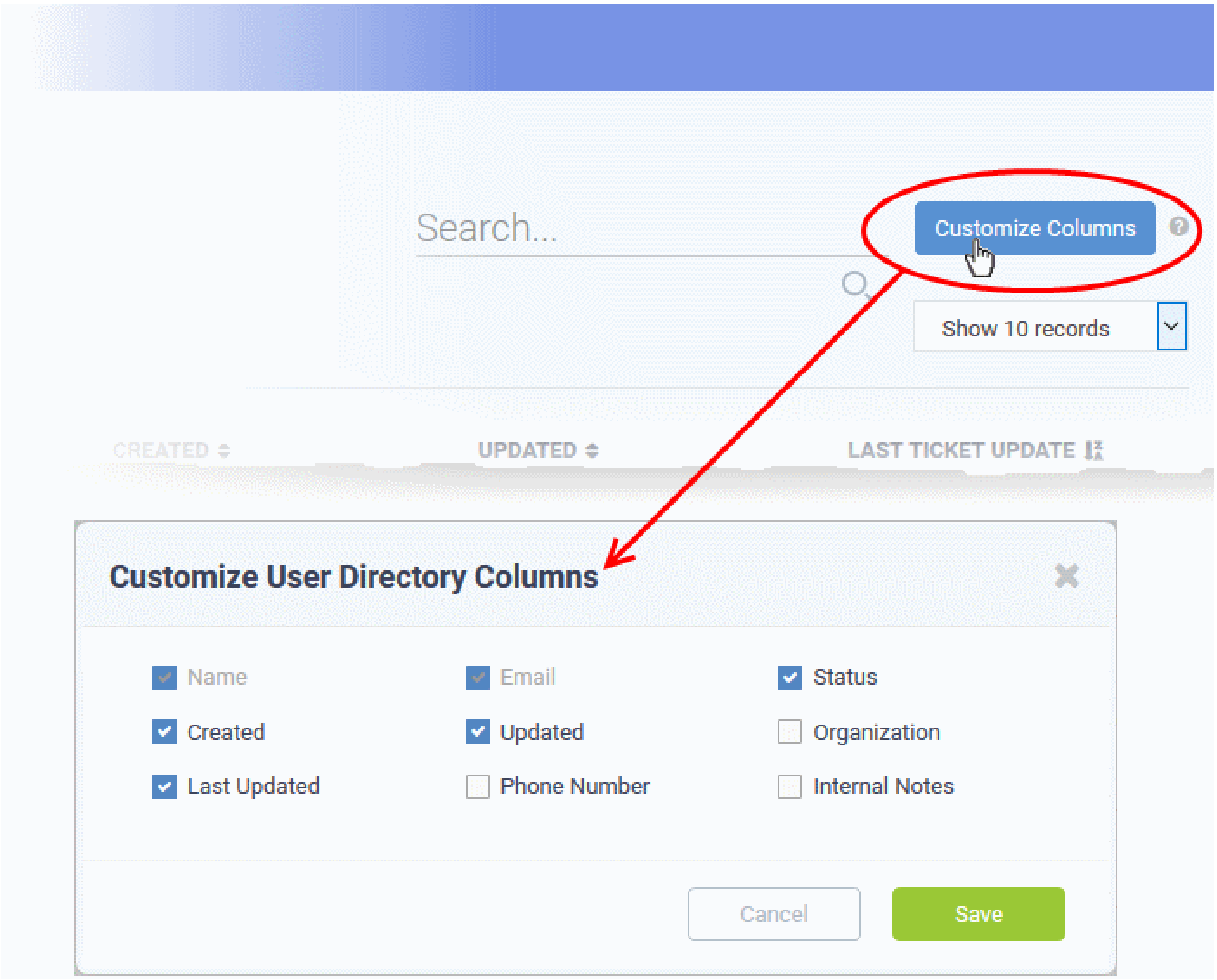
- To download a full list of current users, click the Export to CSV' link at the top of the 'User Directory' interface.

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

3.2.2 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 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.

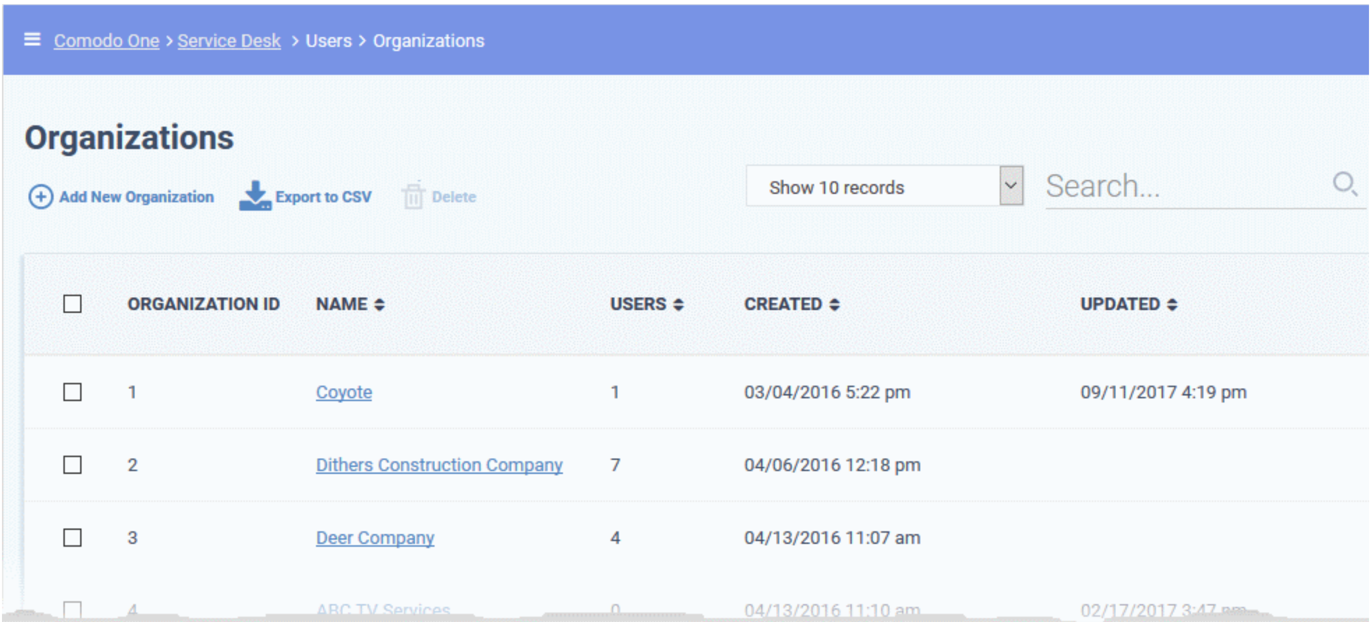
Notes

- 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):



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: • **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.

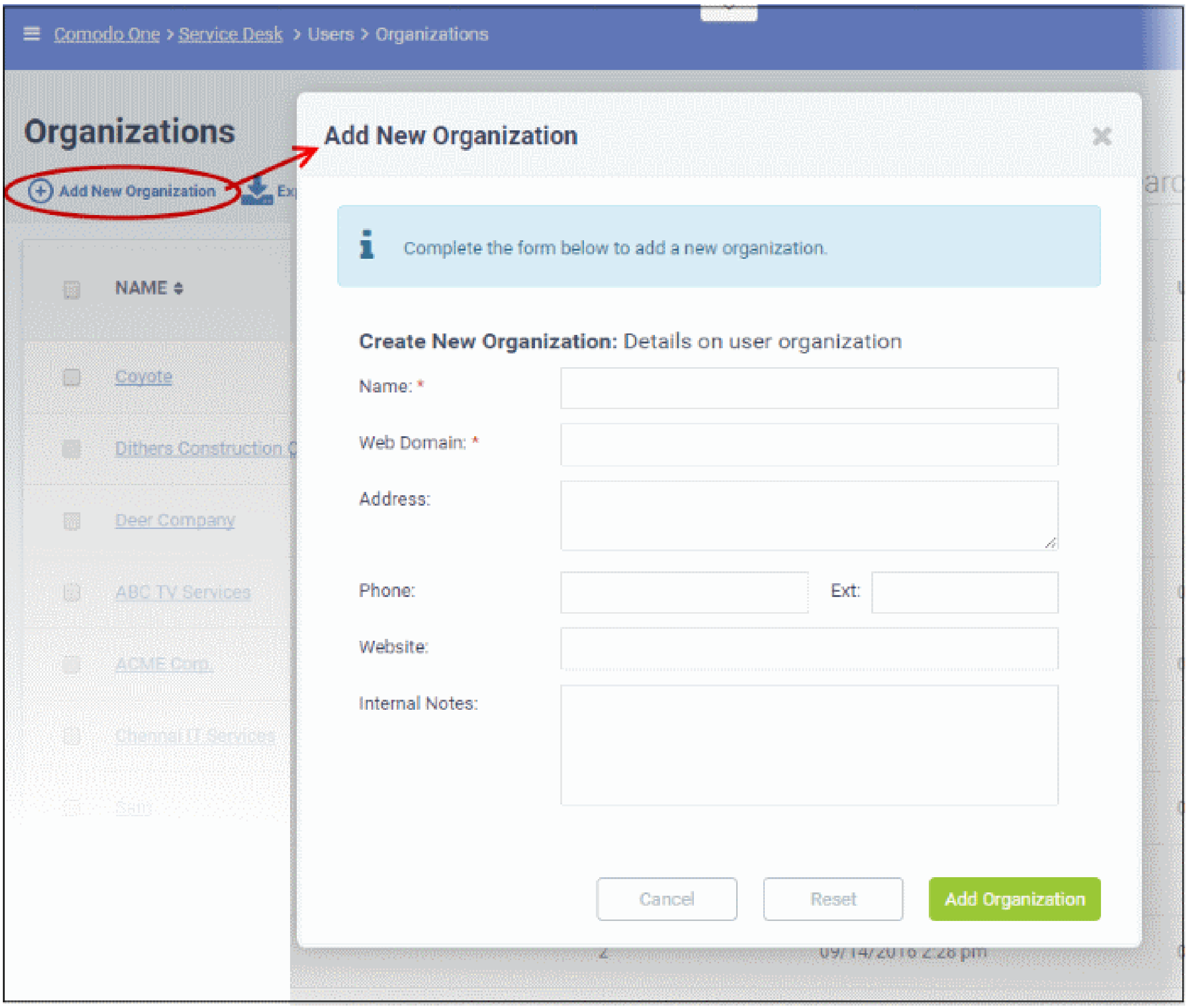
Add an organization

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

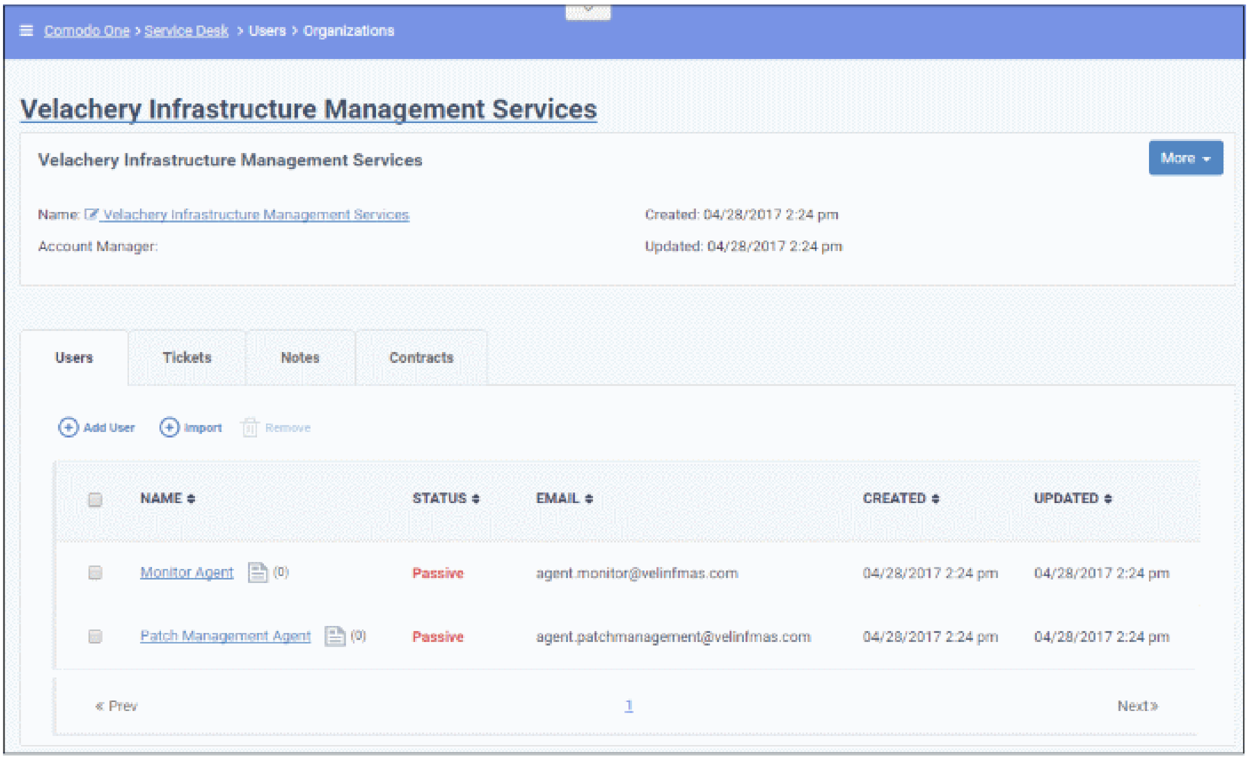


The 'Add New Organization' screen will appear:

- **Name**: Enter the name of the new 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.

Note: The field labels shown are default field labels. You 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. See **Forms** for more information.

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.



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. Refer to **API Keys** for more details.

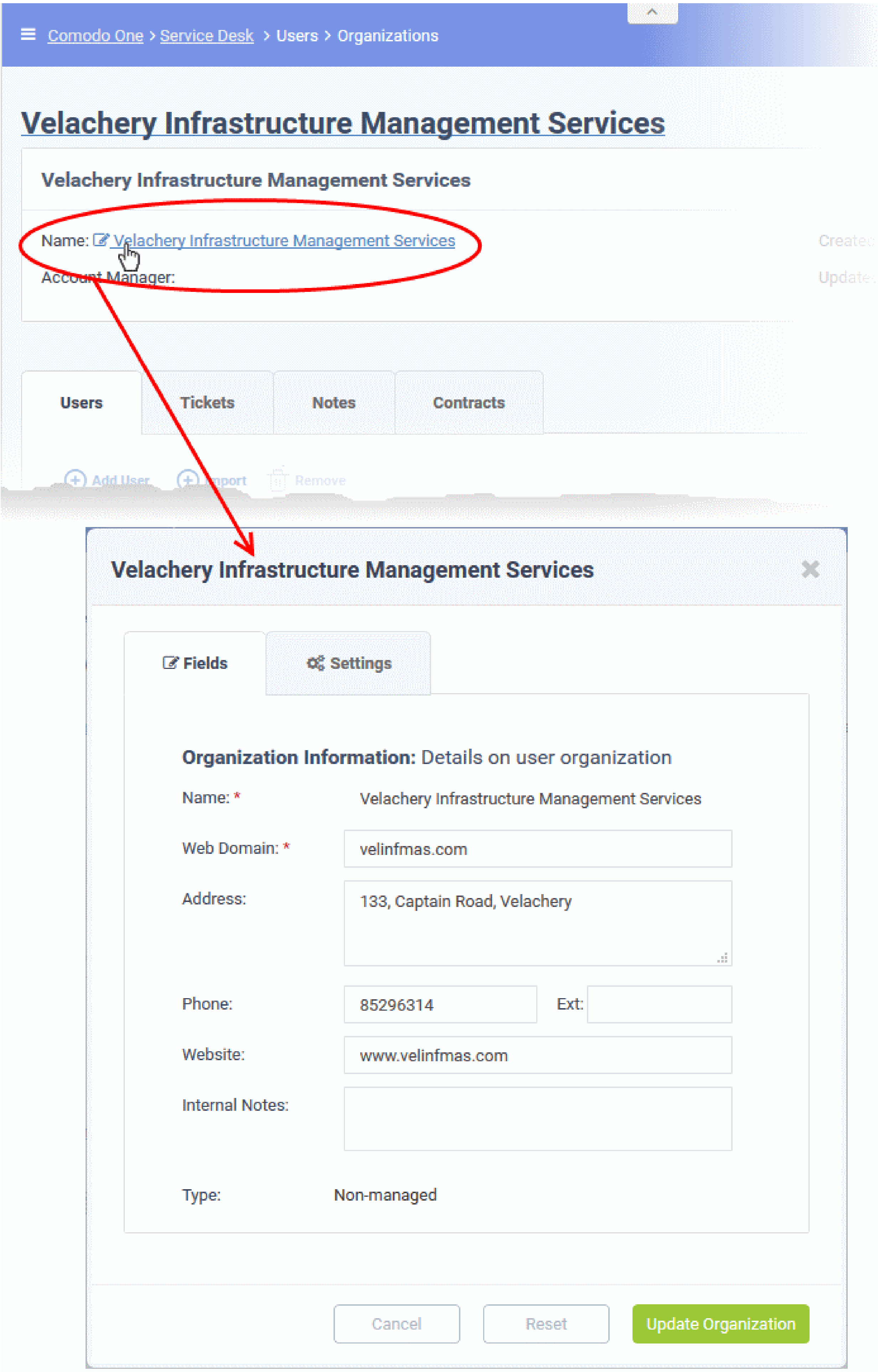
Manage Organization Details

- 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.


Comodo One > Service Desk > Users > Organizations
Velachery Infrastructure Management Services
Velachery Infrastructure Management Services
Name: Velachery Infrastructure Management Services
Account Manager:
Users
Tickets
Notes
Contracts
Add User
Import
Remove
Velachery Infrastructure Management Services
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

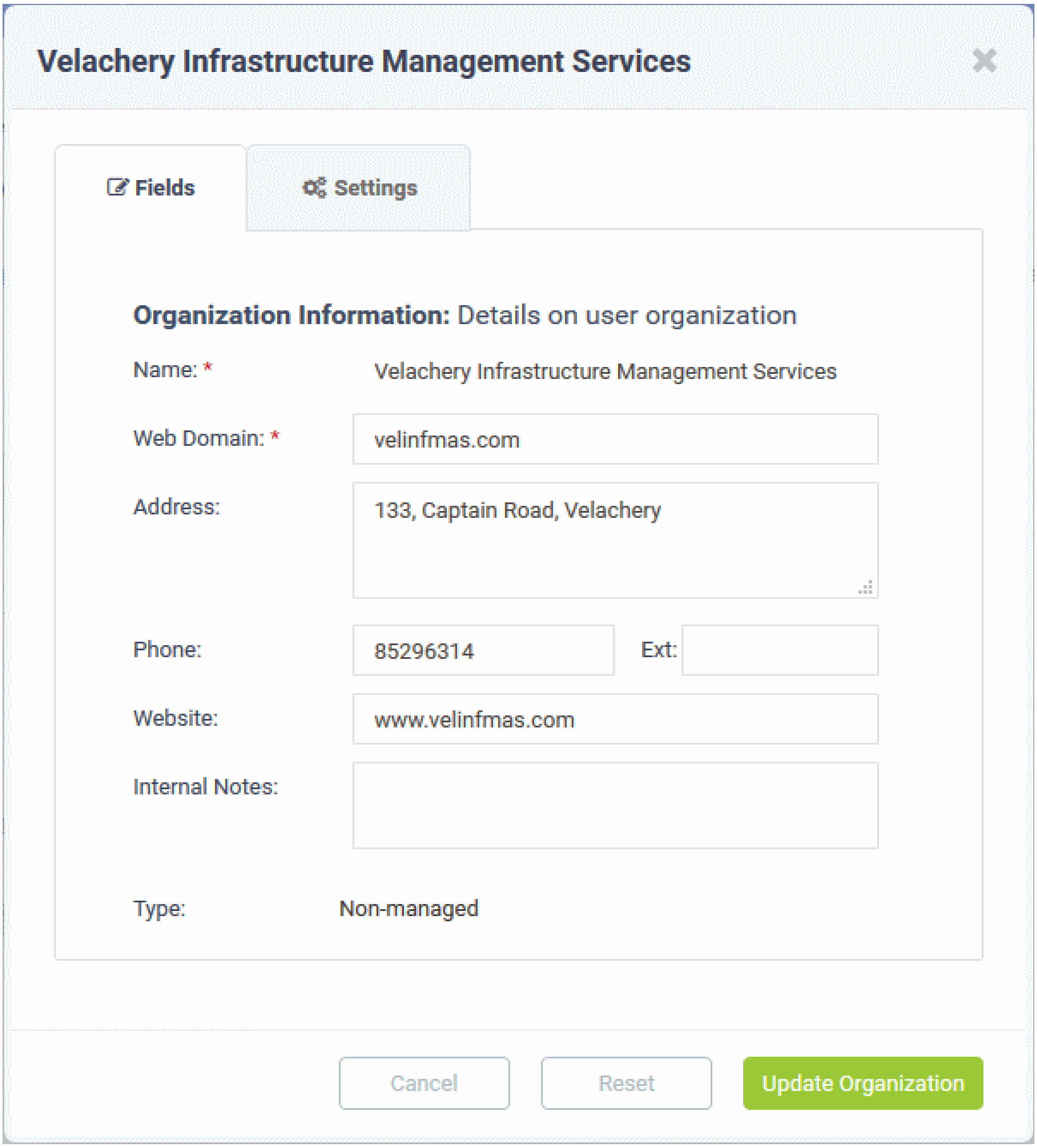
It contains two tabs:

- **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.

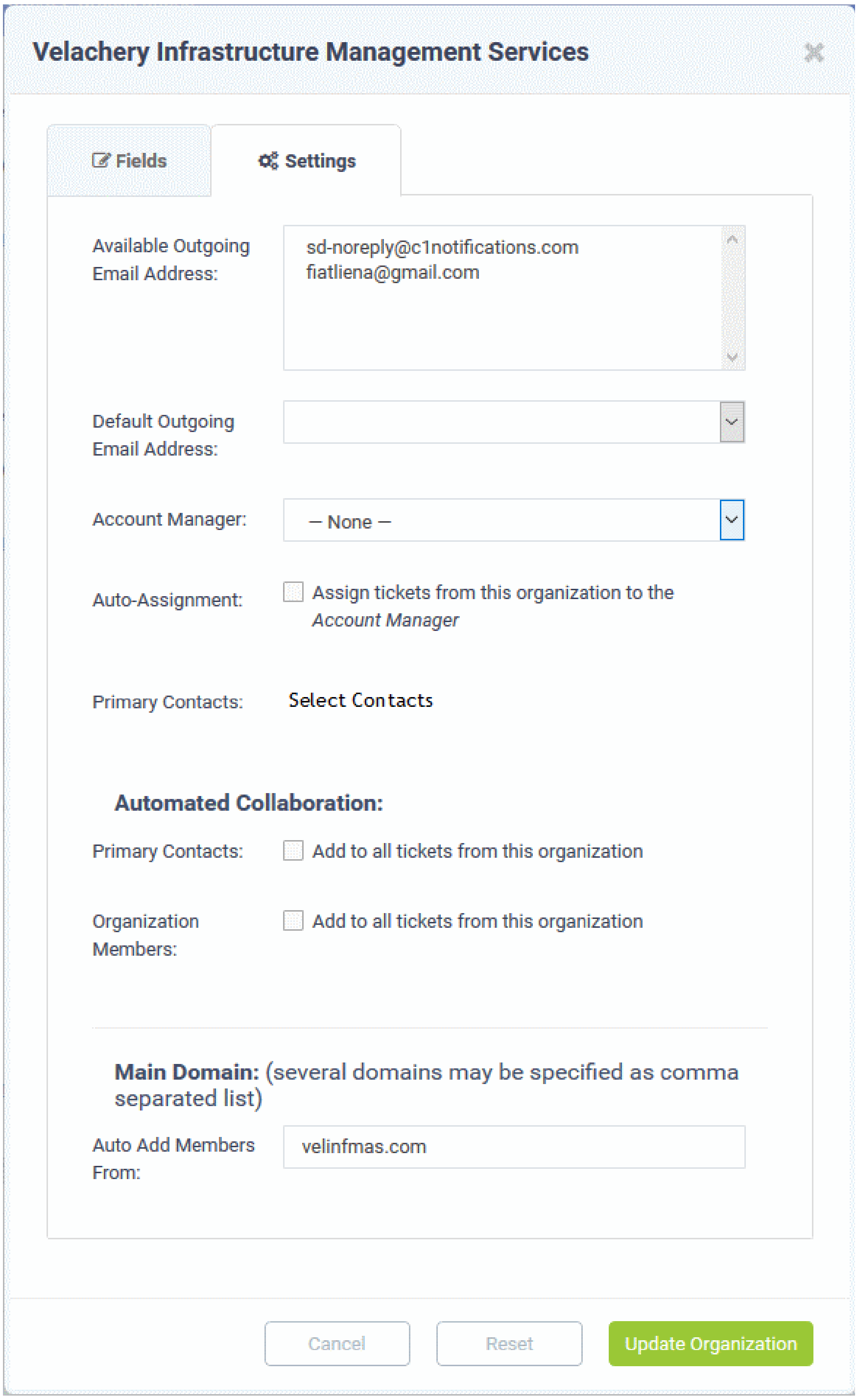


The 'Fields' tab - Form Parameters	
Parameter	**Description**

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



The 'Settings' tab - Form Parameters	
Parameter	**Description**
Available Outgoing Email Address	The 'Available Outgoing Email Address' field displays all available email addresses added for receiving ticket requests and sending outgoing mails in Service Desk.. 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. **Background Note**: Email addresses for receiving ticket requests and sending outgoing mails are configured in the 'Admin Panel' > 'Emails' > 'Emails'

	interface. See **Email Addresses** for more details.
Default Outgoing Email Address	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. The 'Default Outgoing Email Address' drop-down displays only those email addresses selected form the 'Available Outgoing Email Address' field.
Account Manager	The drop-down displays a list of all administrators and staff members added to service desk Choose the account manager responsible for the organization to manage their service desk account and tickets generated by the users .
Auto Assignment	Choose whether or not the tickets generated by the users of the organization are to be automatically assigned to the account manager.
Primary Contacts	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.
Automated Collaborations	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. • 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:	Allows you to specify the domains to import the users from, for the organization.

- 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 also 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:

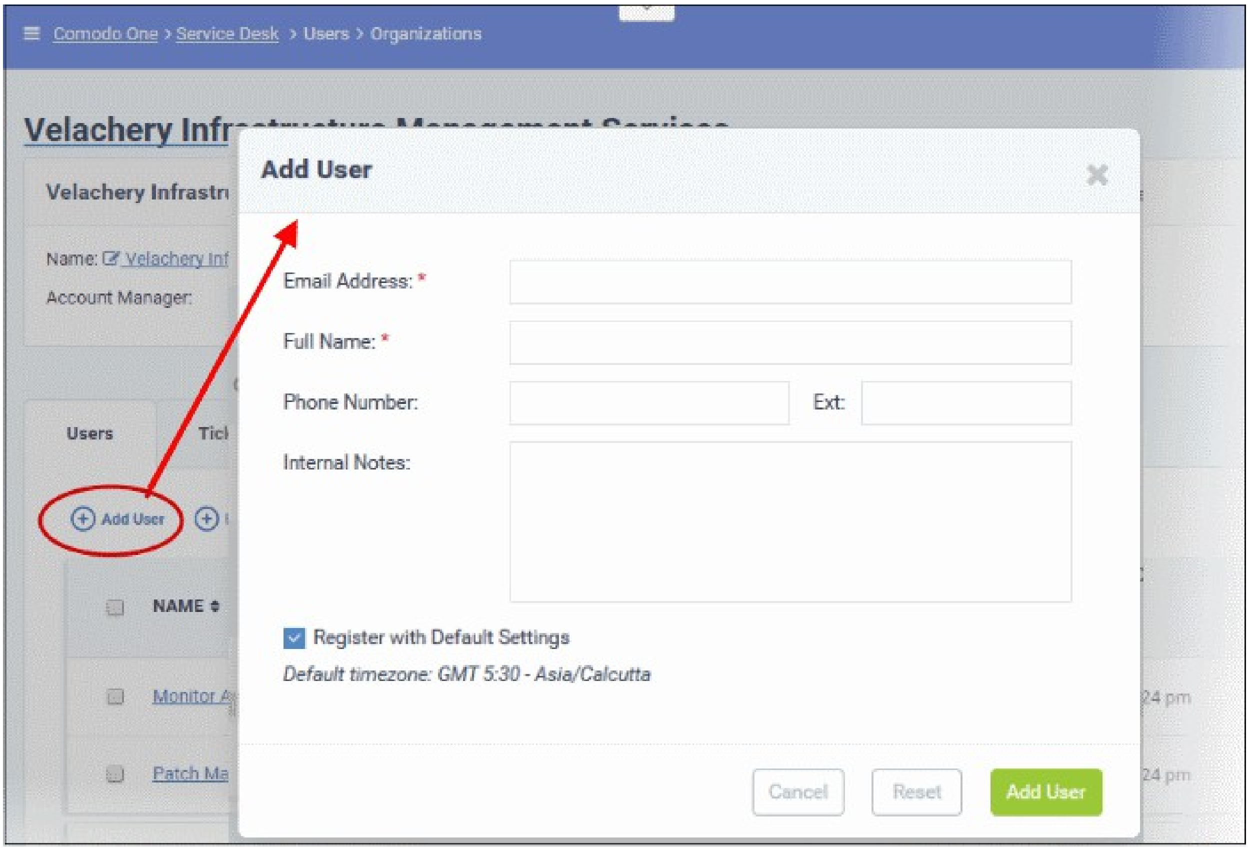
- **Manually add users to an organization**
- **Import users from a list**
- **Remov users from an organization**

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' link at the top

The 'Add User' screen will open:



- **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.

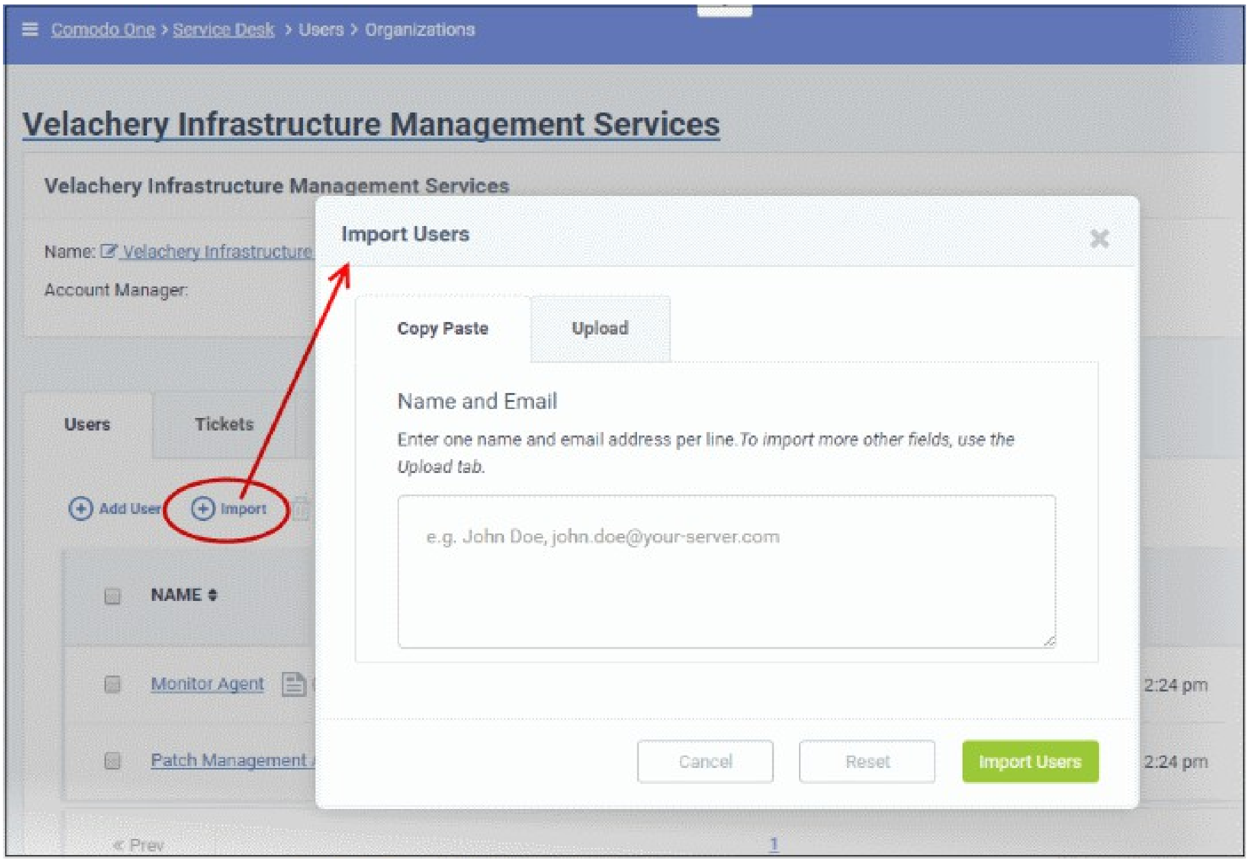
The fields available in the form above are fetched from the built-in 'Contact Information'. This screen can be accessed via Admin Panel > Manage > Forms > Contact Information. See '**Forms**' for more details.

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

To import users to an organization

- Click the 'Users' tab from the Staff Panel and choose '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

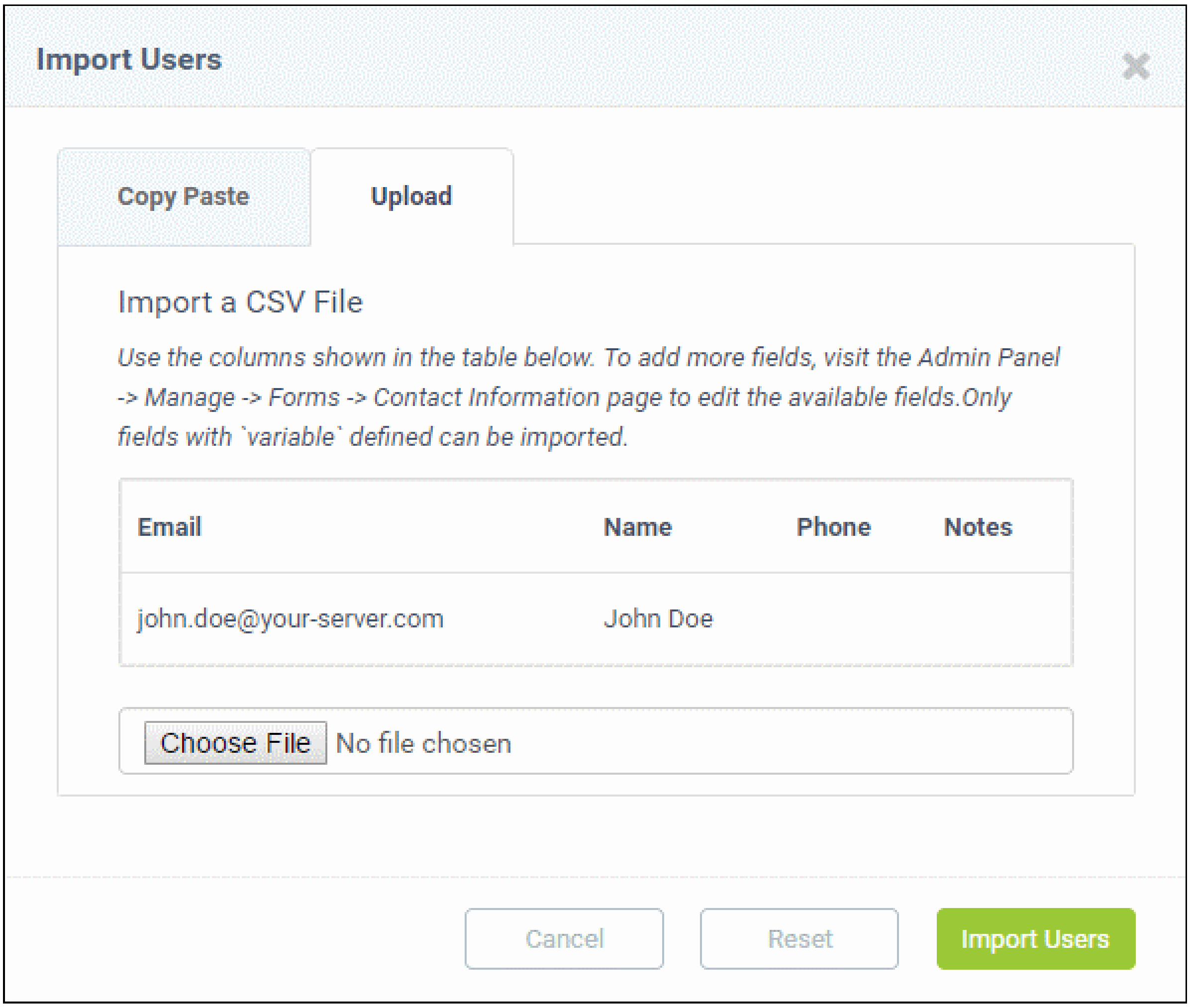
The 'Import Users' screen will open:



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.

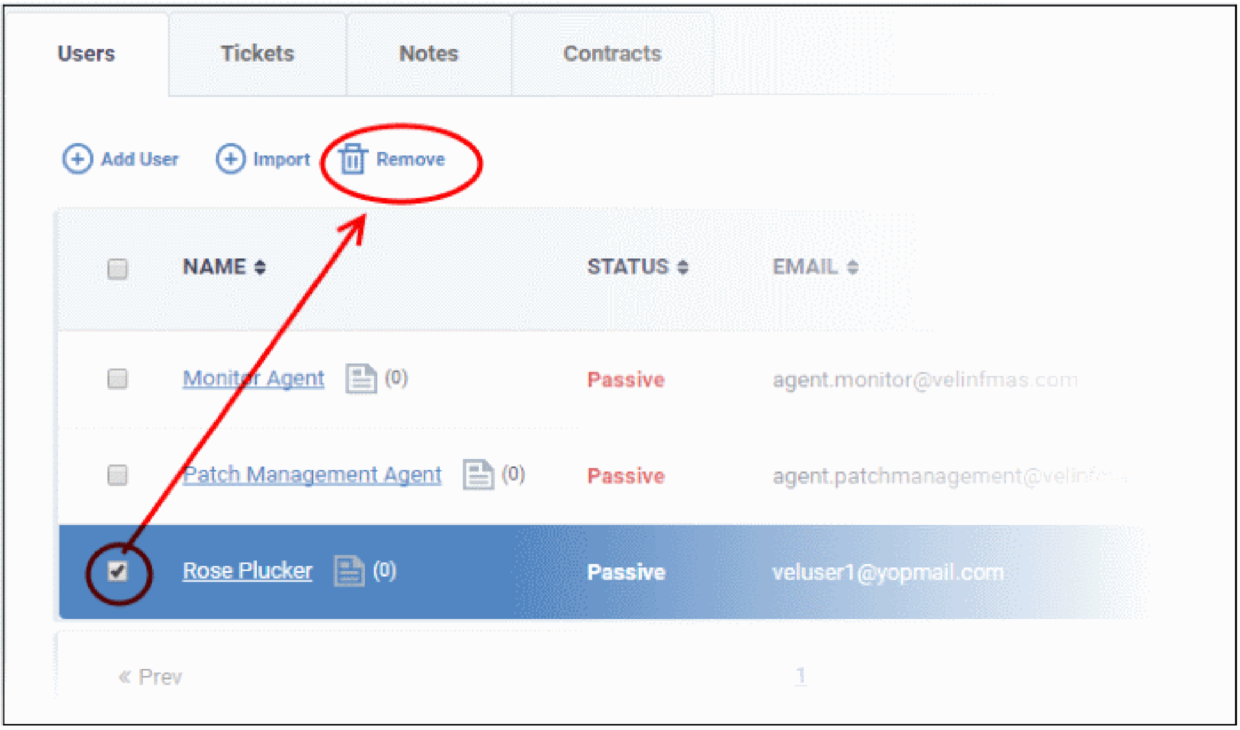


You can add more fields for the users from the 'Admin Panel' > 'Manage' > 'Forms' > 'Custom Form' interface. See **Forms** for more details.

- 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.

To 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 the 'Users' tab to view a list of users belonging to the organization.
- Select the users you want to delete and click the 'Remove' button



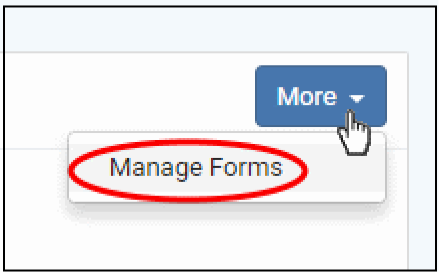
- Click 'Yes, Do it' in the confirmation dialog to remove the user.

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

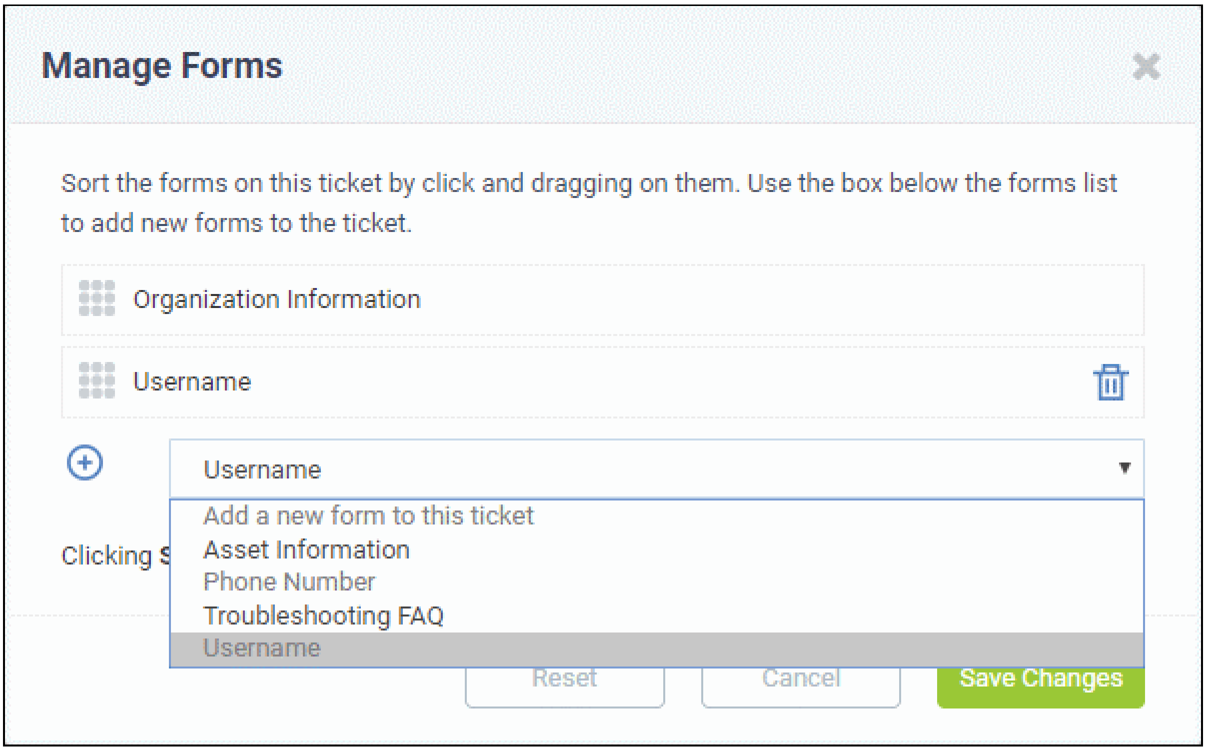
Manage Forms for the Organization

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'

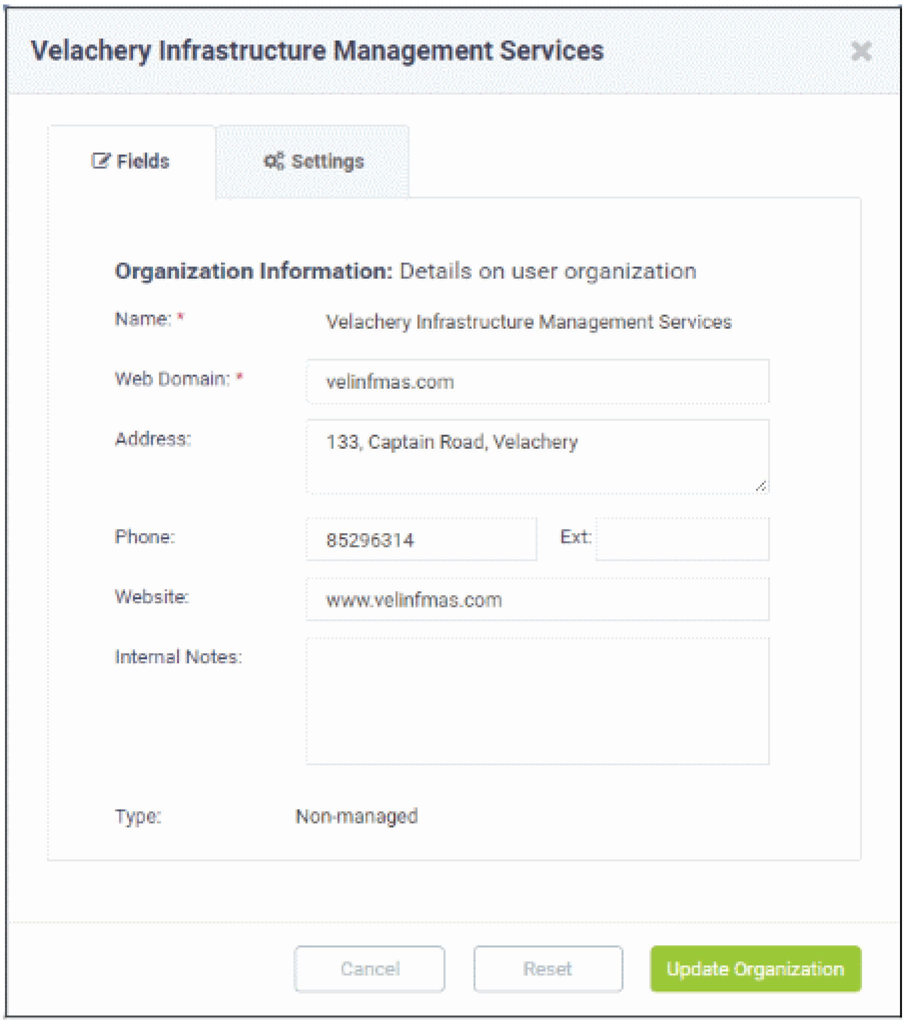


The 'Manage Forms' dialog will open:

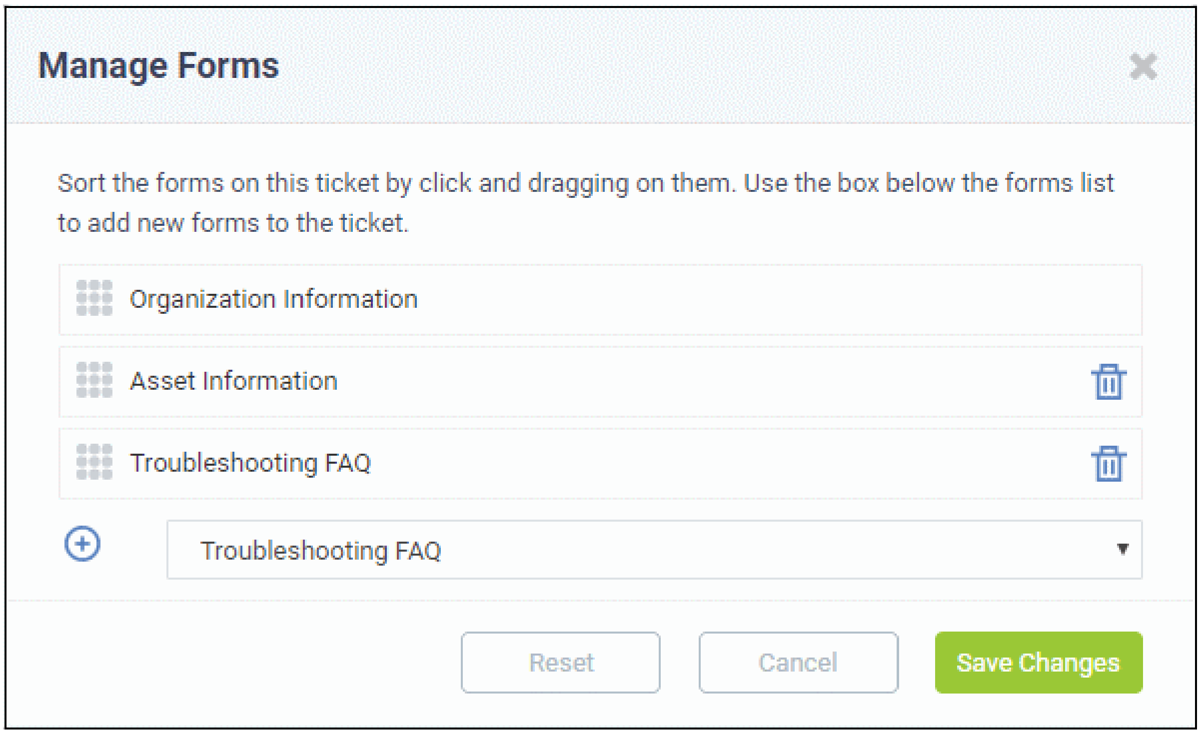


- Select the required form to be added for the organization from the drop-down. The 'Forms' that are listed here can be added by Administrators in the admins in 'Admin Panel' > 'Manage tab' > 'Forms' > 'Add Custom Form'. See '**Forms**' for more details.
- Click the 'Save Changes' button.

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



- Complete the form and click the 'Update Organization' button at the bottom.
- Remove a form from the organization - Click 'More' in the 'Organization Details' screen and click the trash can icon beside the form name.

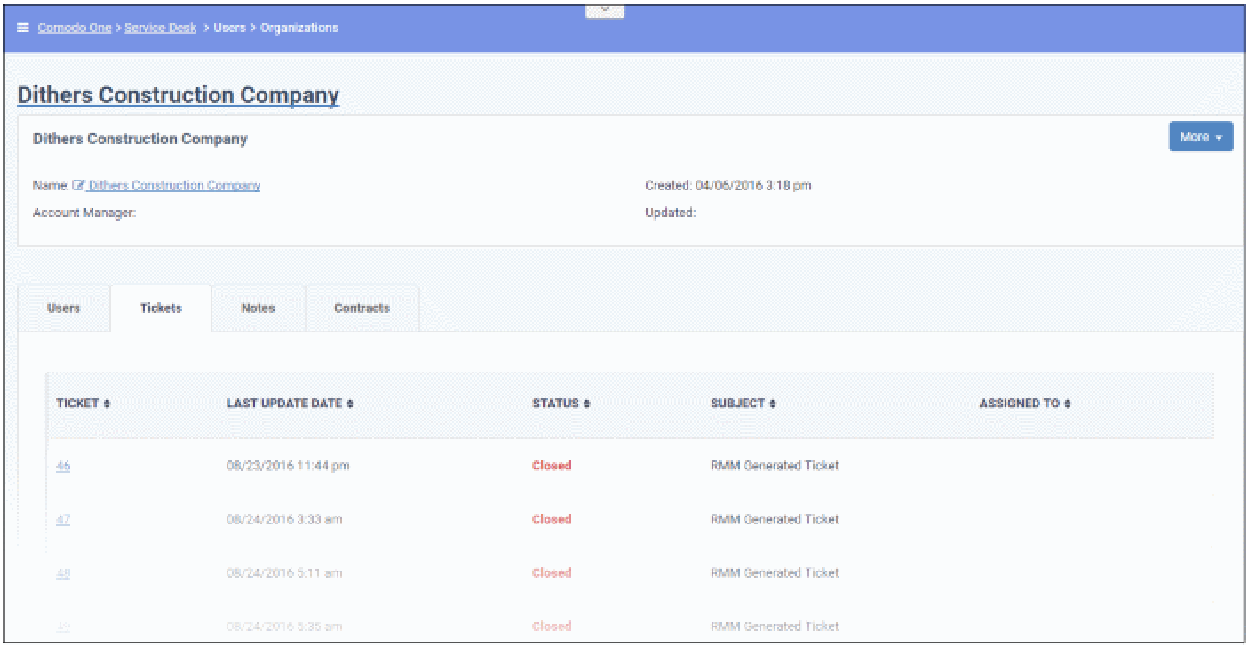


- Click the 'Save Changes' button at the bottom.

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 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:** The current status of the ticket - 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.

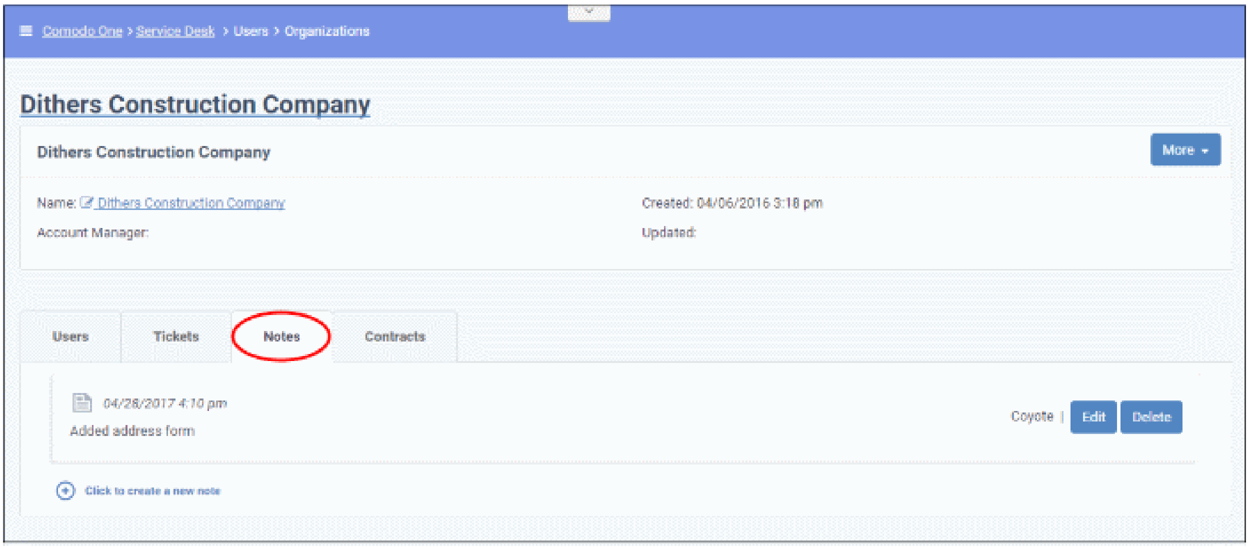
Placing the mouse cursor over a ticket number will display a call out providing the details of the ticket.

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.

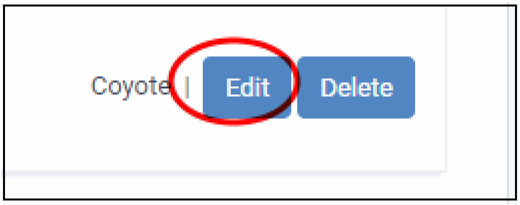
Manage notes

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 to view contracts associated with an organization.

Service Contract

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

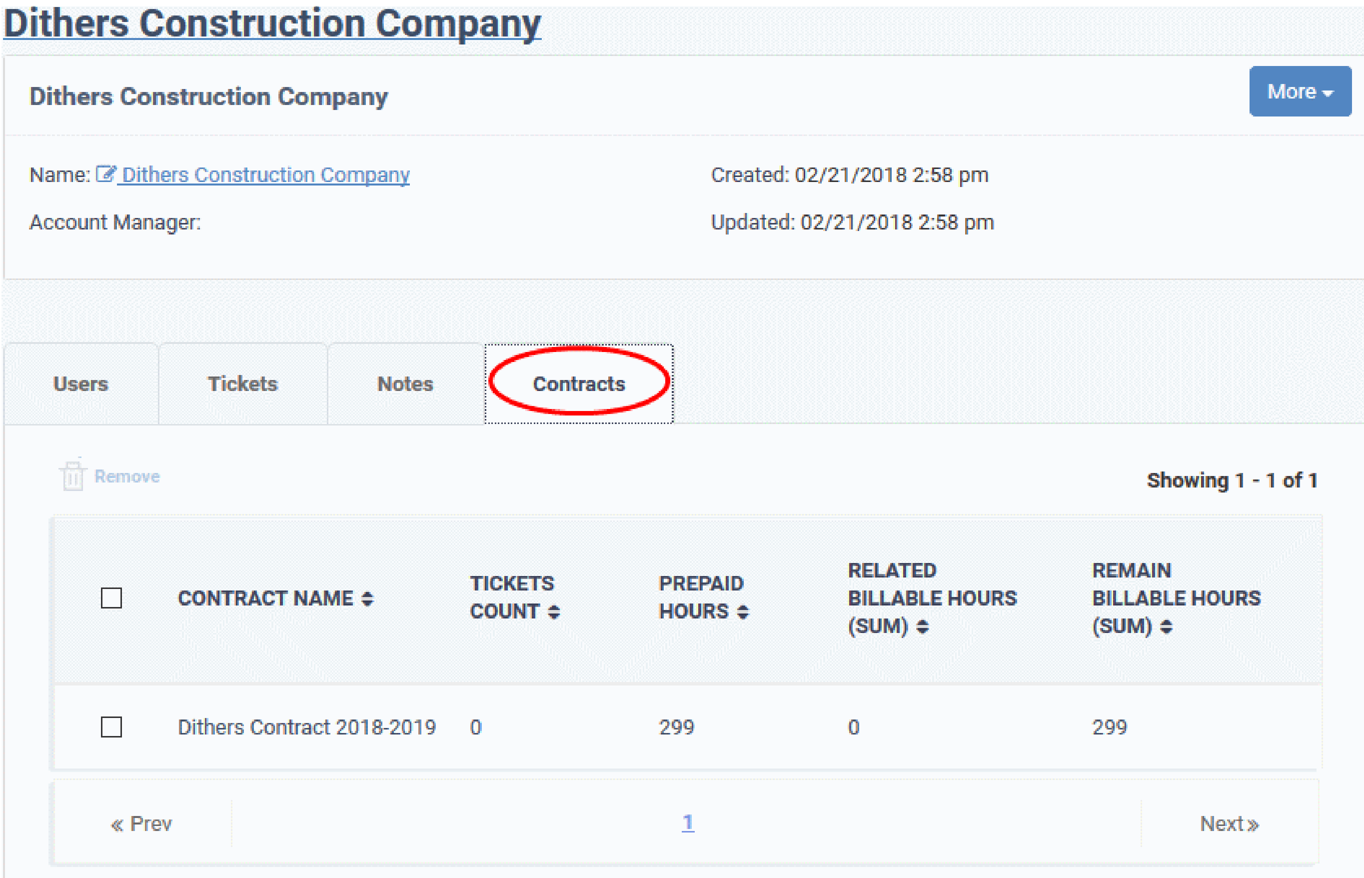
- A weekly/bi-weekly/monthly/yearly fee
- Pre-paid hours for different service types ('On-site', 'Remote' and 'Telephone'). Work done under prepaid hours is not added to the monthly bill.
- A charging plan for time spent on service sessions that exceed the pre-paid hours (optional). The charging

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.
- If no custom charging plan is applied then the default plan is applied. The default charging plan can be managed in **'Admin Panel' > 'Manage' > 'Charging'**.
- For more details on the service contracts, refer to **Managing 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



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

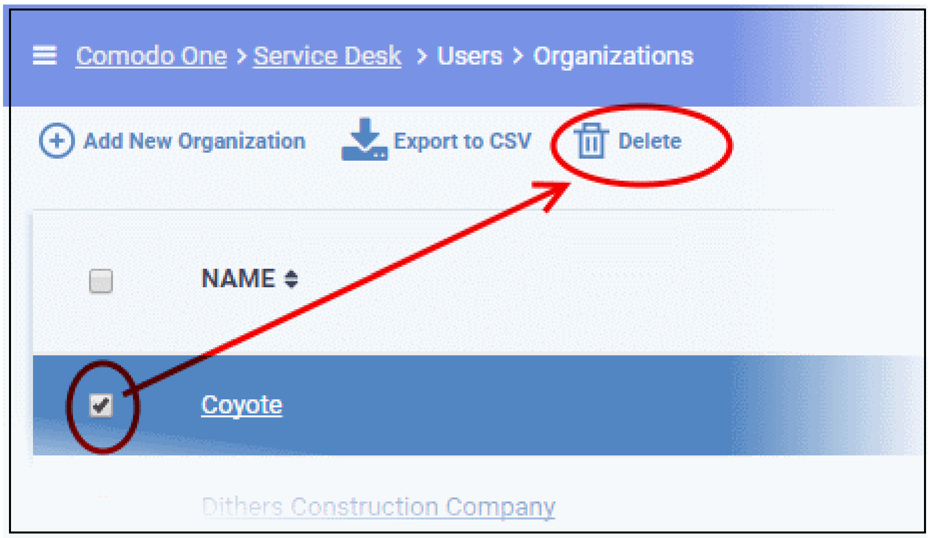
- Organizations added via the C1 interface are assigned 'Managed' status and automatically imported into Service Desk. 'Managed' organizations cannot be removed because they are also enrolled into other products like Endpoint Manager.
- Organizations which are added via the Service Desk interface are 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

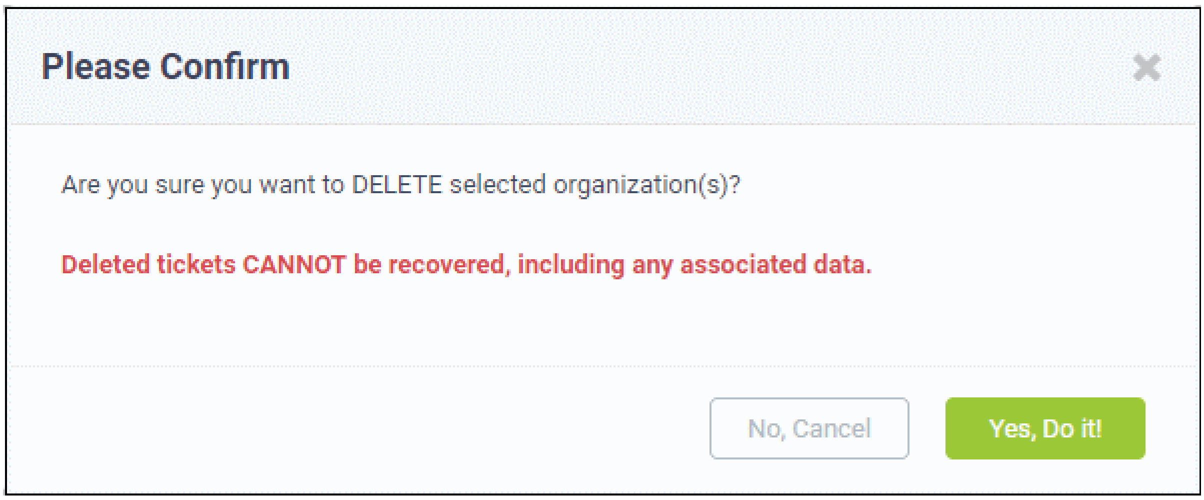
- Click ' Staff Panel' (if required) > 'Users' > 'Organizations' to open the 'Organizations' interface
- Select the organizations you want to remove
- Click the 'Delete' link

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.

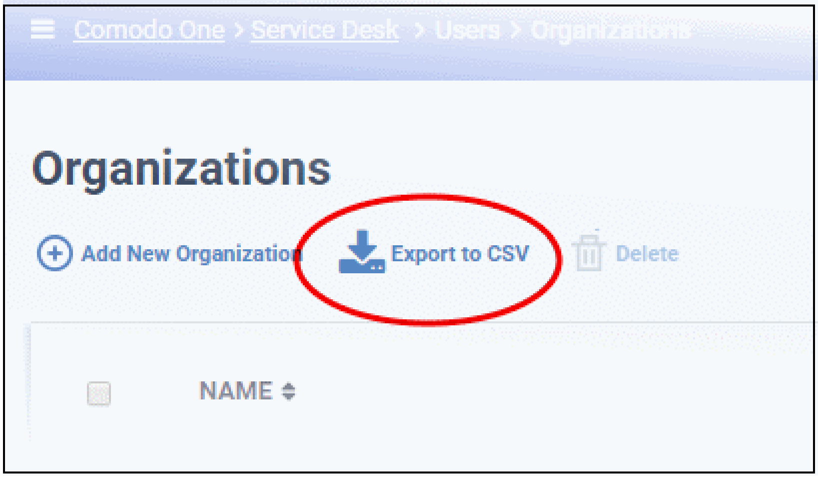


- Click 'Yes, Do it!' in the confirmation dialog to remove the unmanaged organization



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.

3.3 Manage Tickets

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

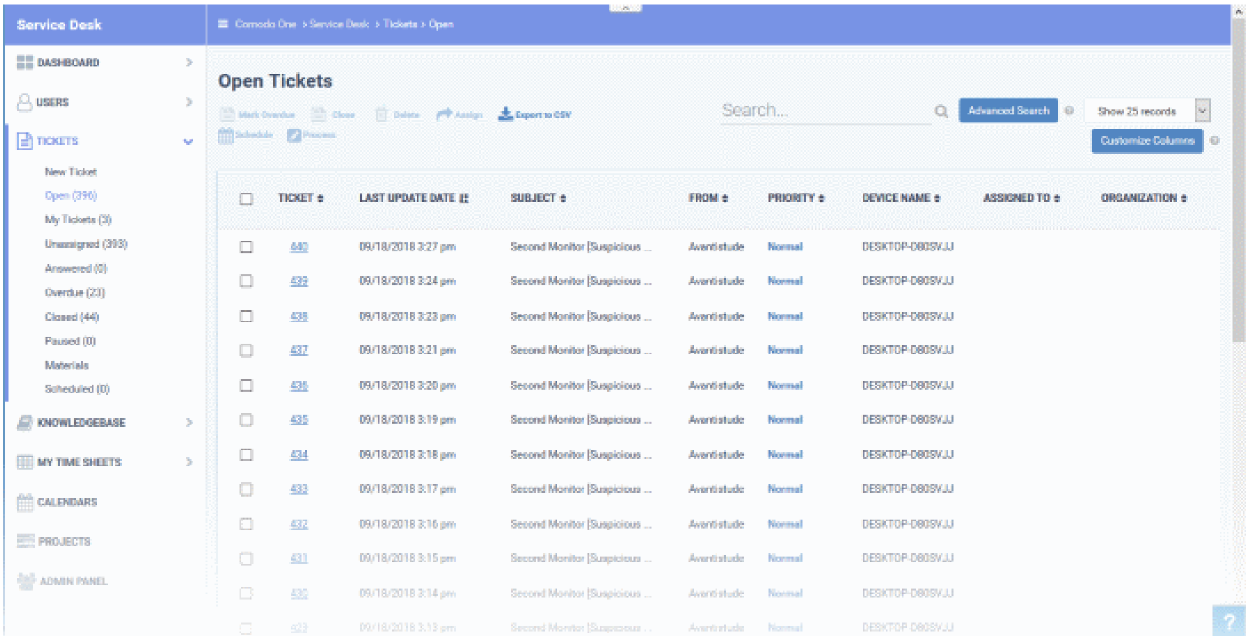
Tickets can be submitted to C1 using the following interfaces:

- **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 so enabled by an administrator.
- **Email** - Users can create tickets by sending an email to the default 'System Email' for the help desk.
- **Staff Panel** - Staff and administrators can create tickets from the staff panel 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 will be added with a 'Closed' status.
- **C1 modules** - Tickets can be automatically generated by ITSM, RMM and Patch Manager upon specific events.
  - ITSM endpoint users can 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:
  - My Tickets
  - Unassigned
  - Answered
  - Overdue
  - Closed
  - Scheduled

- Paused



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

- **New Ticket**: Allows the currently logged-in staff member or admin to create a ticket on behalf of a user. See **Create a new ticket on behalf of a user** for more information.
- **Open**: Tickets that are not yet resolved. 'Assigned' and 'Answered' tickets may be excluded from this view by configuring options in the '**Ticket Settings and Options**' interface. 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. Admins can assign tickets to staff members by clicking the ticket number/subject then clicking the 'Assign' link at the top. See **Bulk assignment of tickets to a staff 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 are not closed within the stipulated period per the SLA plan. Overdue tickets will be closed automatically if set in the '**Ticket Settings and Options**' interface.
- **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 details of material costs and other expense items added to tickets by staff, with their approval status. See **View Details of Materials/Expense Items added to Tickets** for more details.

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

Tickets - Table of Column Descriptions	
Column Header	**Description**

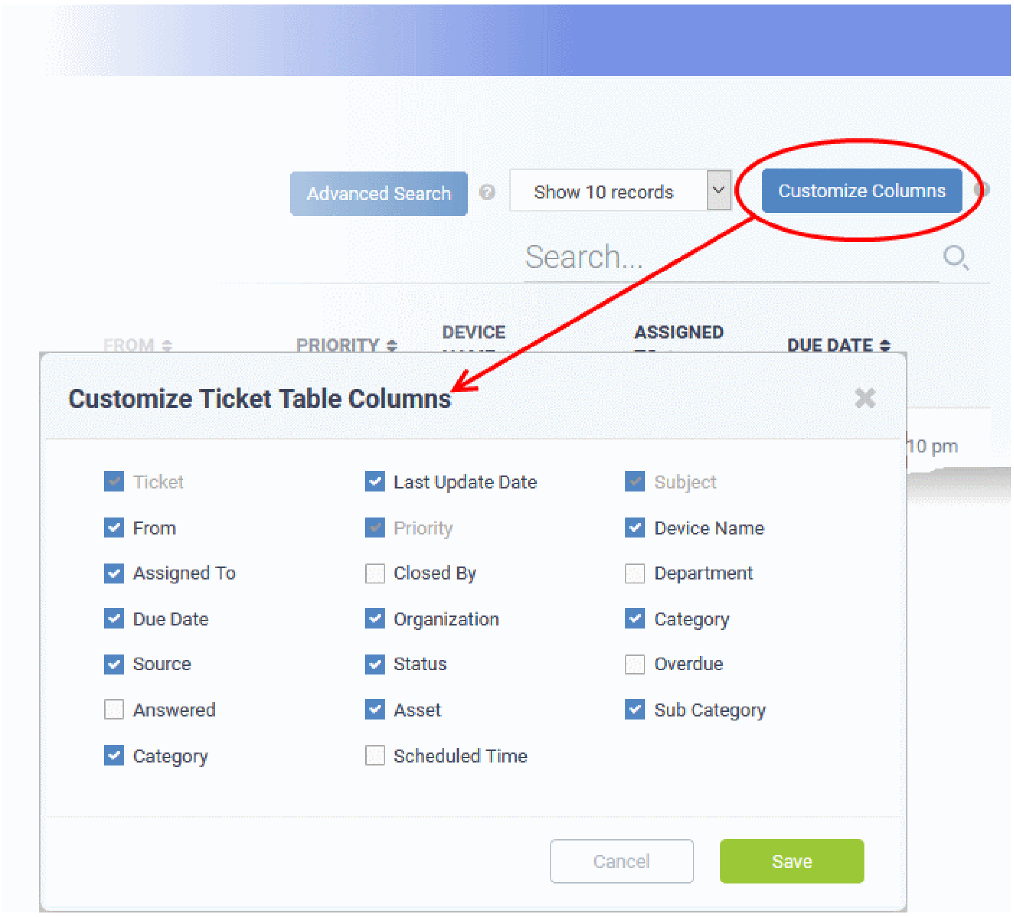
Ticket	The number assigned to the ticket. Clicking the ticket number will open the 'Ticket Details' screen. • - Tickets that were raised via the web portal. • - Tickets that were raised via email. • - Tickets that were raised by staff members on behalf of users.
Last Update Date	The date and time at which ticket was created, reopened, last updated or closed.
Subject	A brief description of the issue. • In many cases, the subject will have been specified by the user or staff member who created the ticket. This is done in the 'Issue Summary' field of the 'New Ticket' interface. • The subject of tickets that were created by another C1 module will simply say which module spawned the ticket. For example, 'RMM Generated Ticket'. The icons in the subject column indicate the status of the ticket. • - 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	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'. • Assigned To: The name of the staff member to whom the ticket is assigned • Department: The name of the department to which the ticket is assigned
Organization	The organization/company of the user who raised the ticket
Source	The channel through which the ticket was created. Possible channels are: • Phone

	• Email • Other • Web • API
Sub Category	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: • Open • Answered • Overdue • Closed • Paused
Ticket Category	Displays the help topic on which the user requested support. See **ticket category** for more details.
Overdue	Indicates whether the ticket was not closed on or before the due date.
Answered	Indicates whether a response has been given to the user for the reported issue.
Asset	Indicates the asset type for which the issue was reported.
Category (Ticket Type)	The support category of the ticket. The possible values are: • Alert • Order • Problem
Sub-Category	Specific issue type as chosen by the person who created the ticket. For example, 'Overheating' may be a sub-category of 'Problem'.
Scheduled Time	Date and time at which the ticket will be attended to.

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:



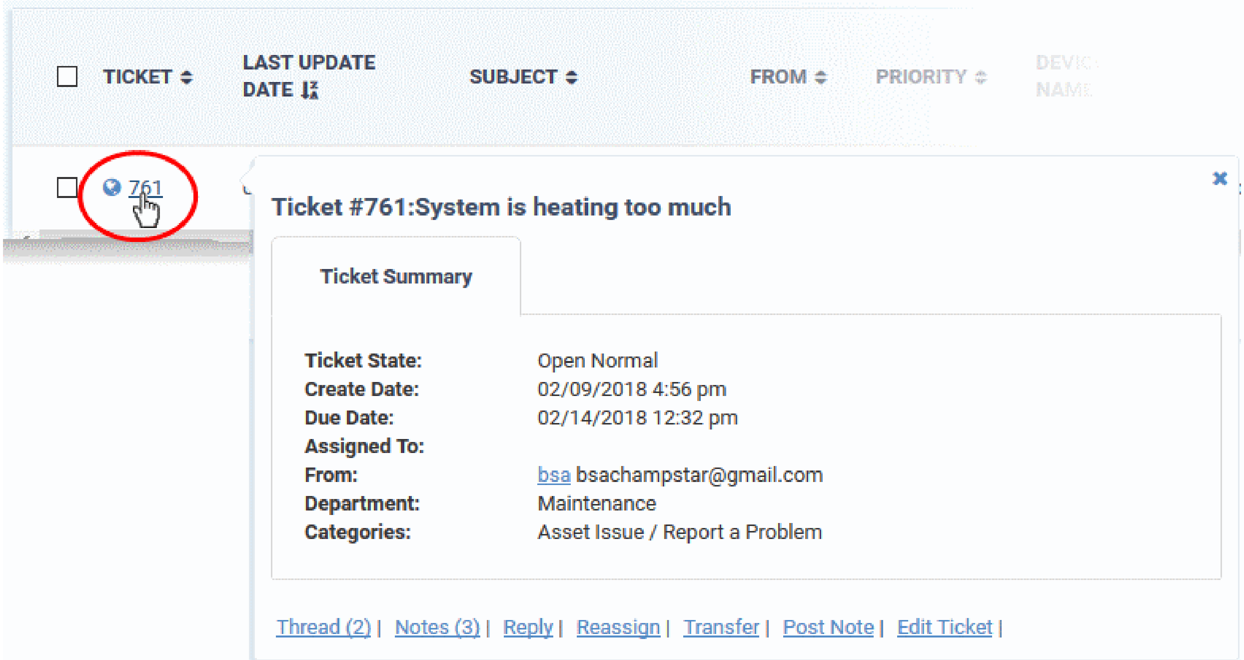
- Use the check-boxes to enable or disable columns as required
- Certain columns are mandatory for certain views
- Click 'Save' to add/remove the selected columns to the list

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:



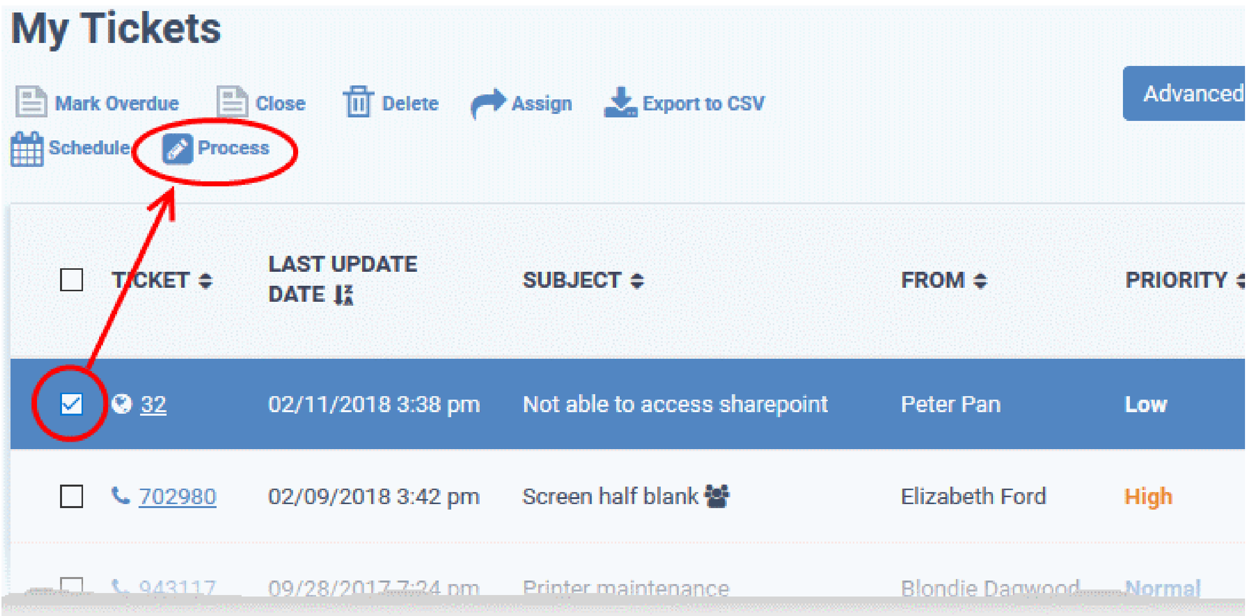
The links at the bottom allow staff members to manage the ticket. See '**Ticket Details**' for more details.

Process a Ticket

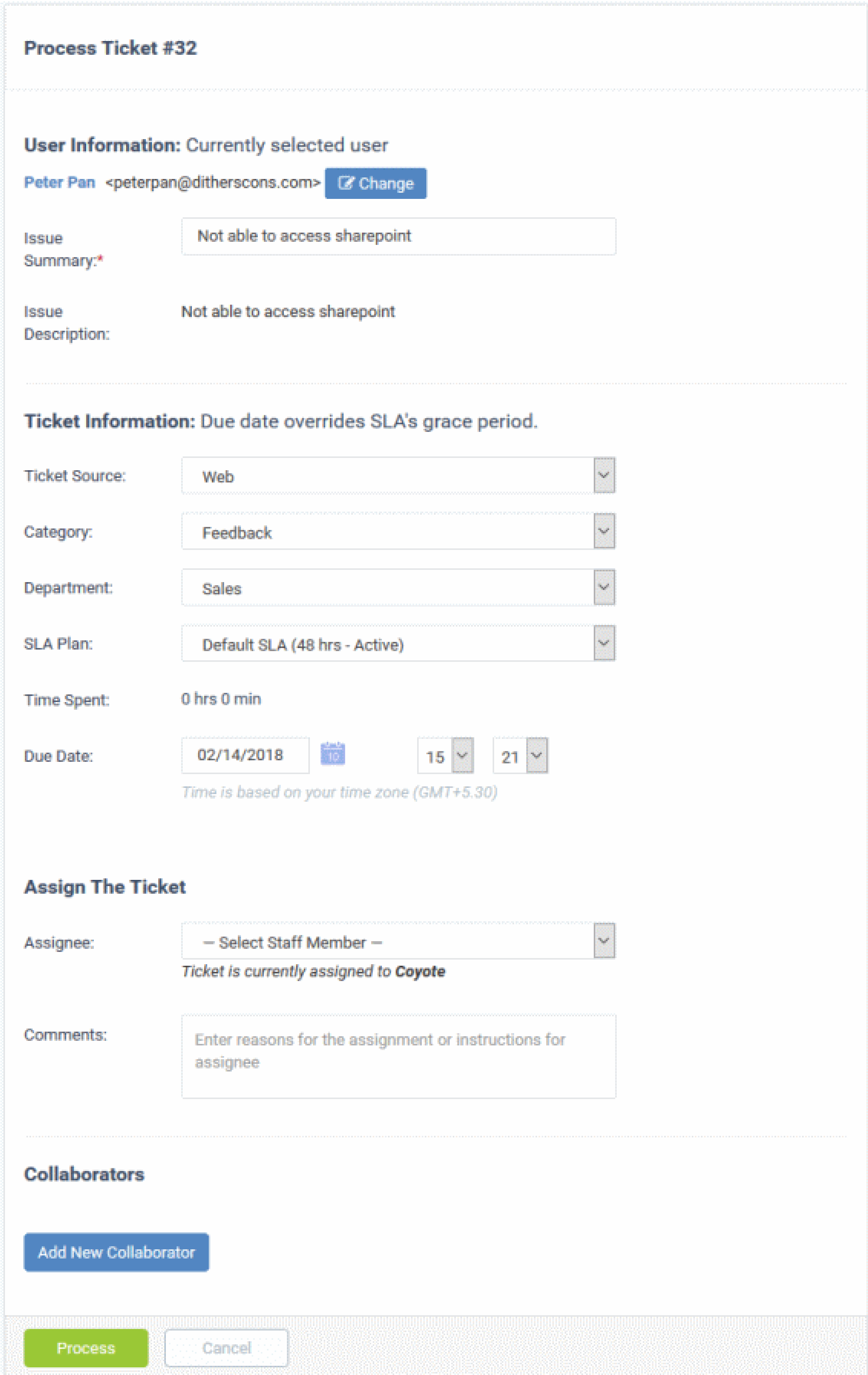
- The 'Process' feature allows you to quickly update ticket details. You can reassign ticket to a different staff/administrator, update items such as user information, ticket category, department, collaborators and more.
- Alternatively, you can also edit individual tickets by opening the ticket and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

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:



The 'Process Ticket' screen will open:



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 to the ticket is currently assigned. This is pre-populated and can be updated if required. See '**Departments**' 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 a session and time manually added by administrator/staff.
- **Due Date:** The date and time by which the ticket should be closed. Change the date and time if required. This will override the date generated by default.

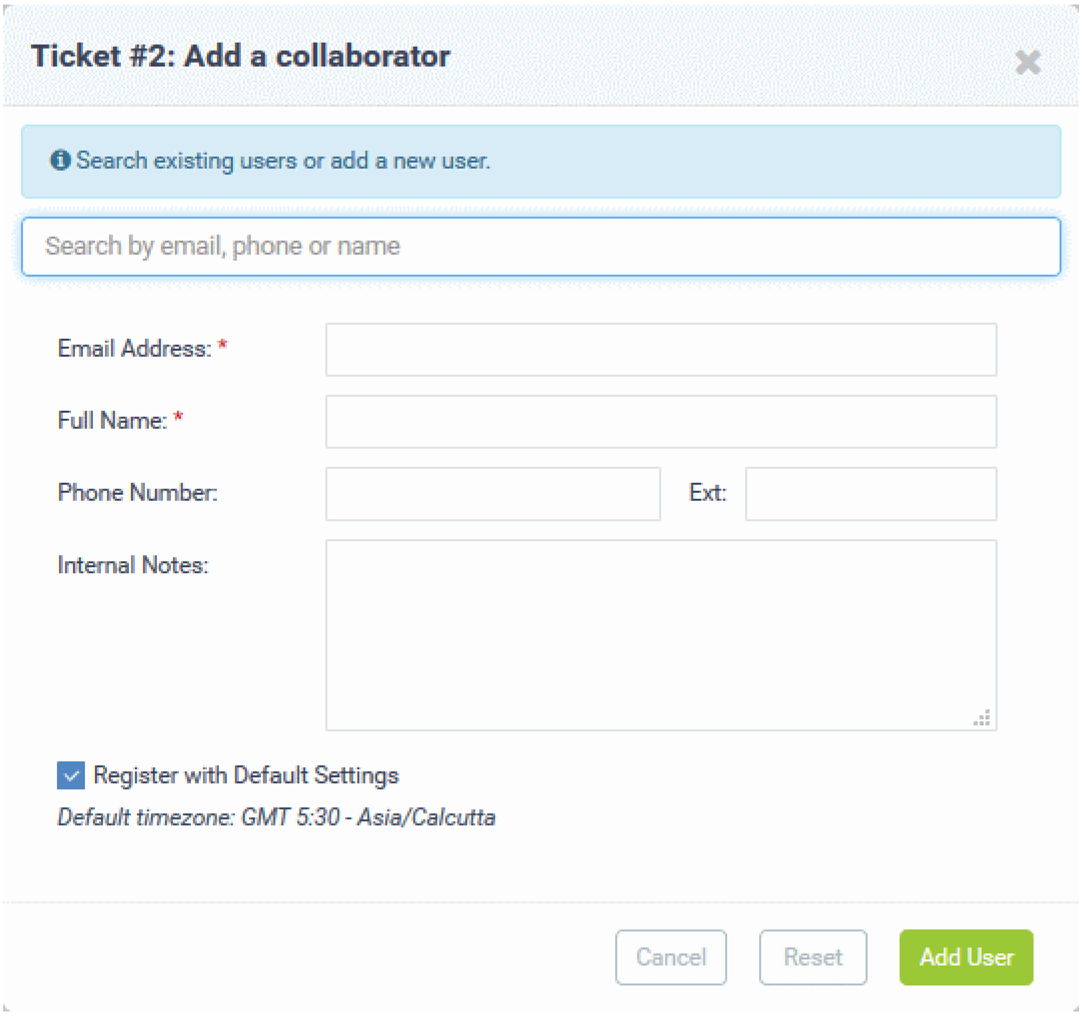
Assign the Ticket

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

Collaborators

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

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



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

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

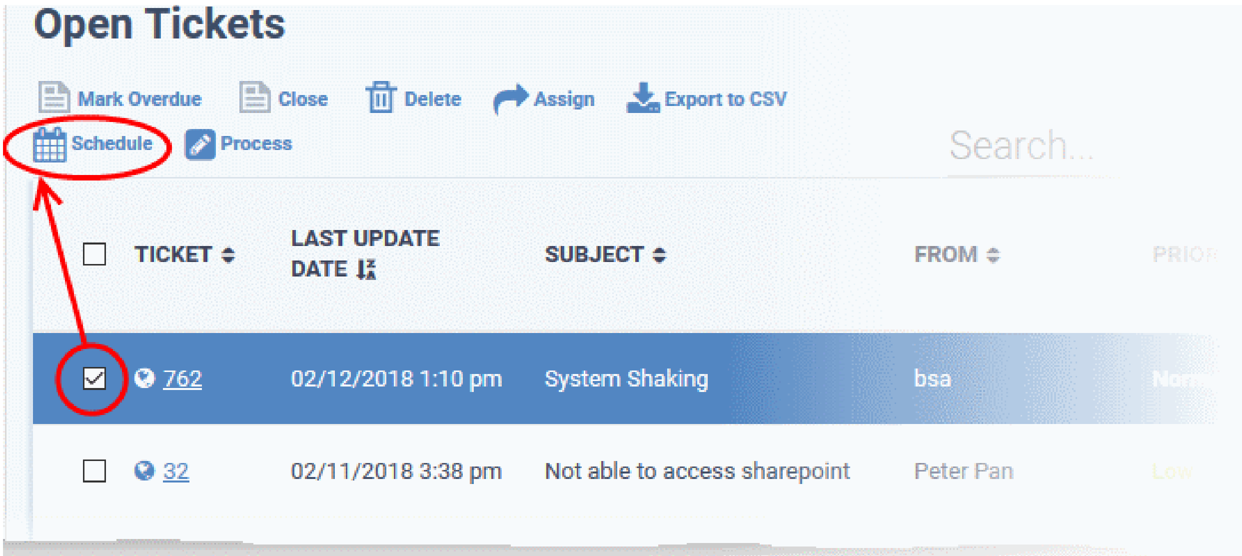
Schedule a Ticket

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

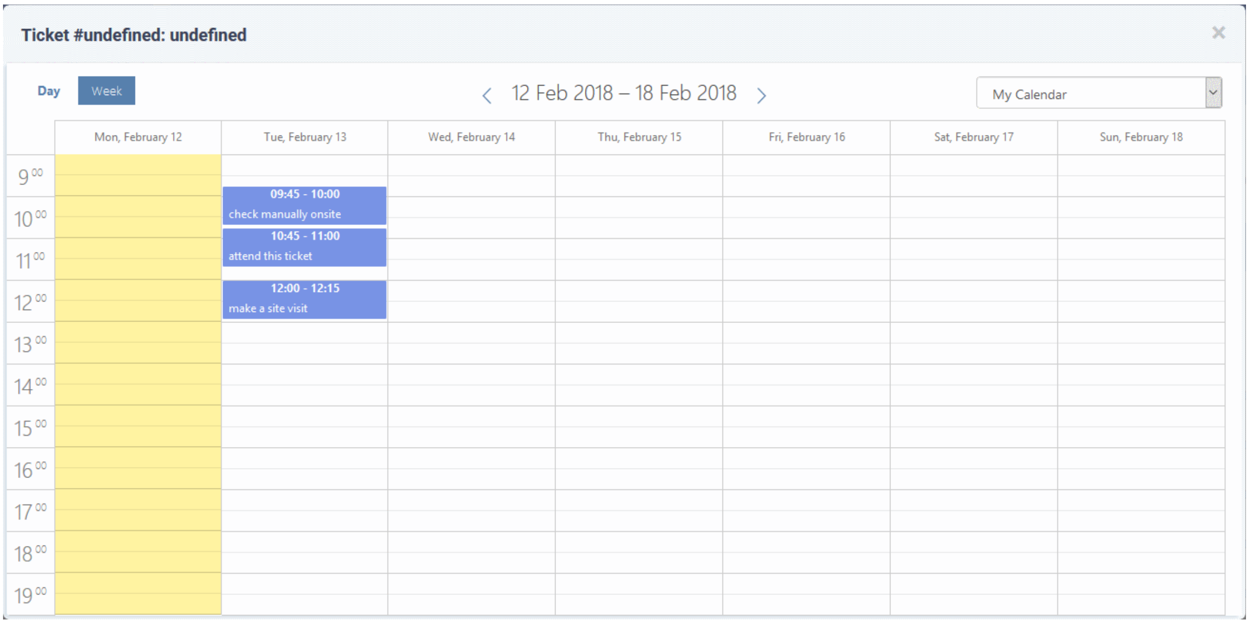
- The schedule will be added to the calendar of the currently logged-in administrator/staff.
- The ticket will be assigned to the person who creates the schedule, even it it is currently assigned to someone else.
- The ticket can be rescheduled to a different time period from the 'Ticket Details' interface.

To create a schedule for a ticket

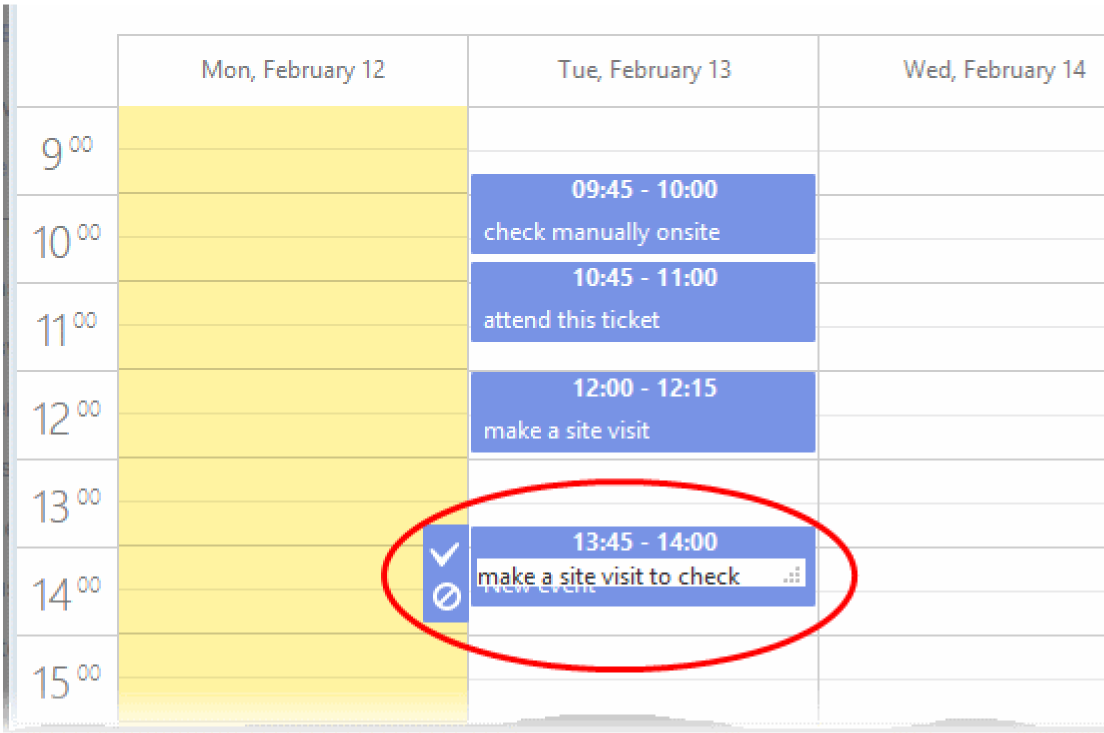
- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Select a ticket and click 'Schedule' at the top:



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



  - By default, the current week will be displayed. You can view the current week or day by clicking the respective button above the calendar.
  - To move to next week/day, use the '>' buttons on the top
- Double click on the cell that represents the time slot on which you wish to fix appointment for the ticket
- Enter a short description for the task to be executed.



- Click the tick mark to save the schedule

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

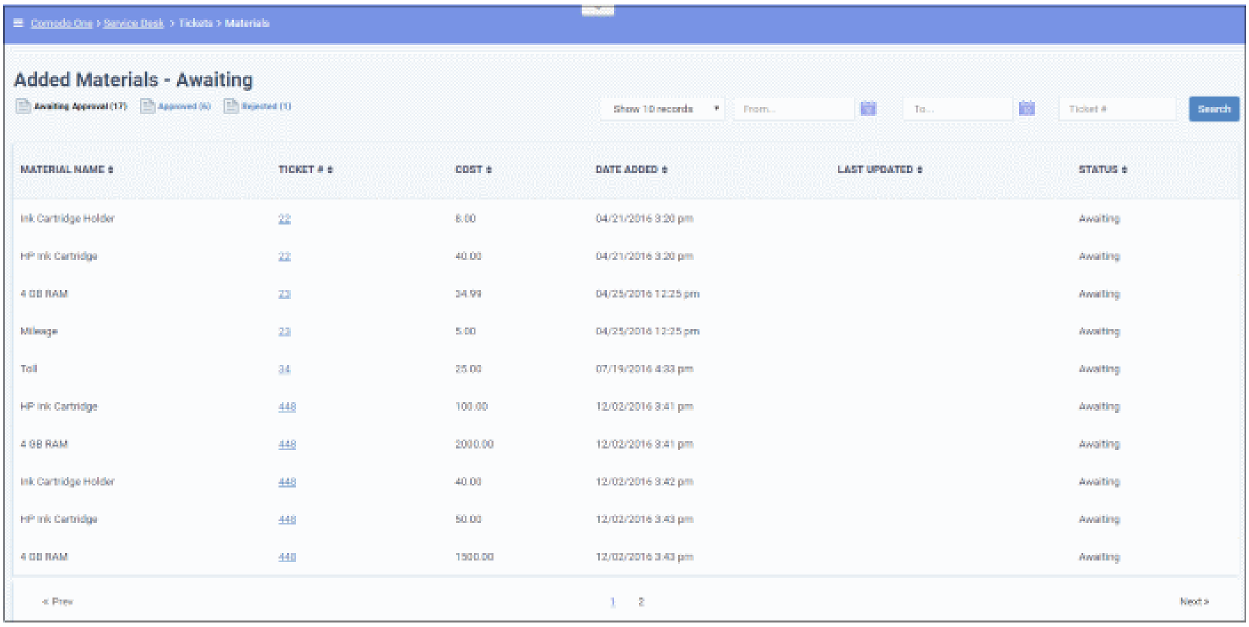
The ticket will be moved to the list under the 'Scheduled' category on the left.

View Materials/Expense Items added to a Ticket

The 'Tickets' section allows staff and admins to view any 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	1500.00	12/02/2016 3:43 pm		Awaiting

« Prev 1 2 Next »

Column Headers

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

Sorting and Filtering Options

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

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

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

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

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

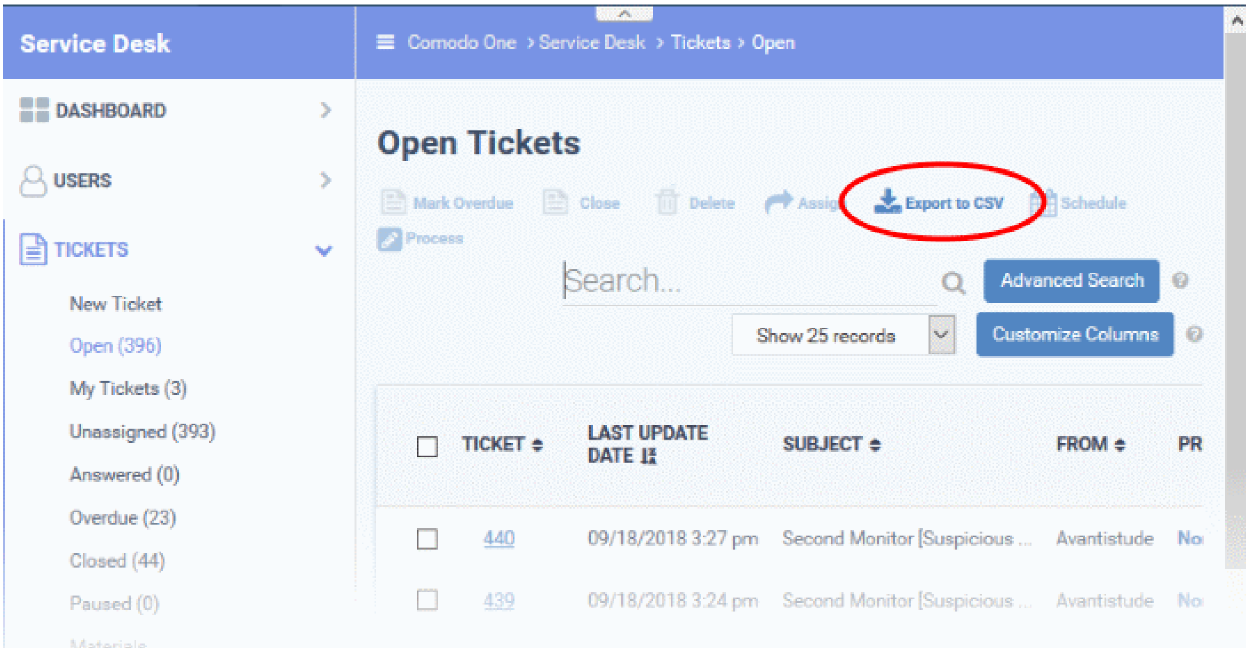
The 'Show records' drop-down on the right allows you to select the number of entries to be displayed per page. The options range from 10 records per page up to 100. The default value can be set in the '**My Profile**' interface. You can navigate to different pages by clicking 'Next' and 'Prev'.

Export tickets to a CSV file

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

To save the list of tickets

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



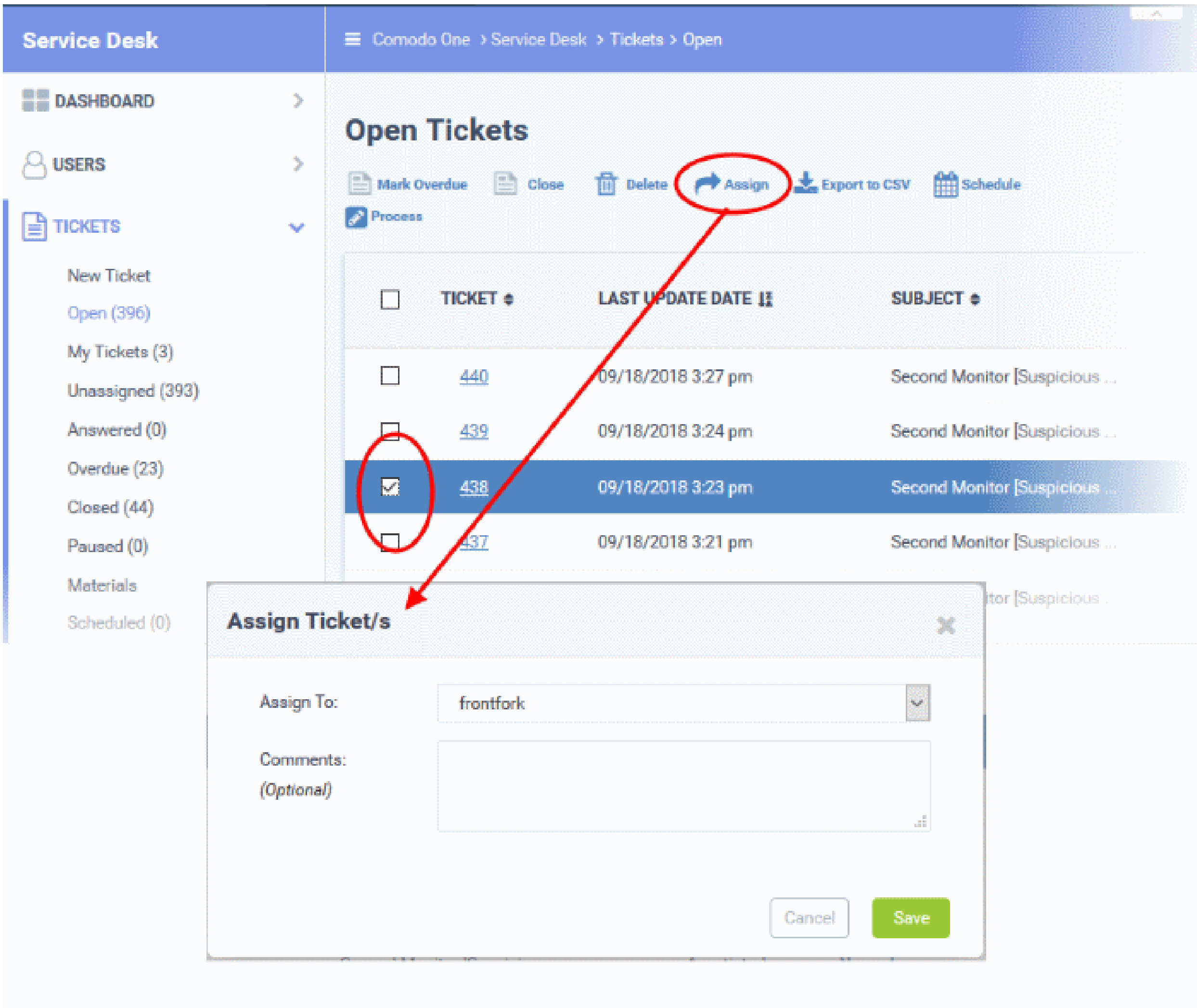
The list will be downloaded as a .csv file. The file can be opened with spreadsheet applications like Microsoft Excel and OpenOffice Calc.

Assign Tickets to a Staff Member

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

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

- Click 'Save'

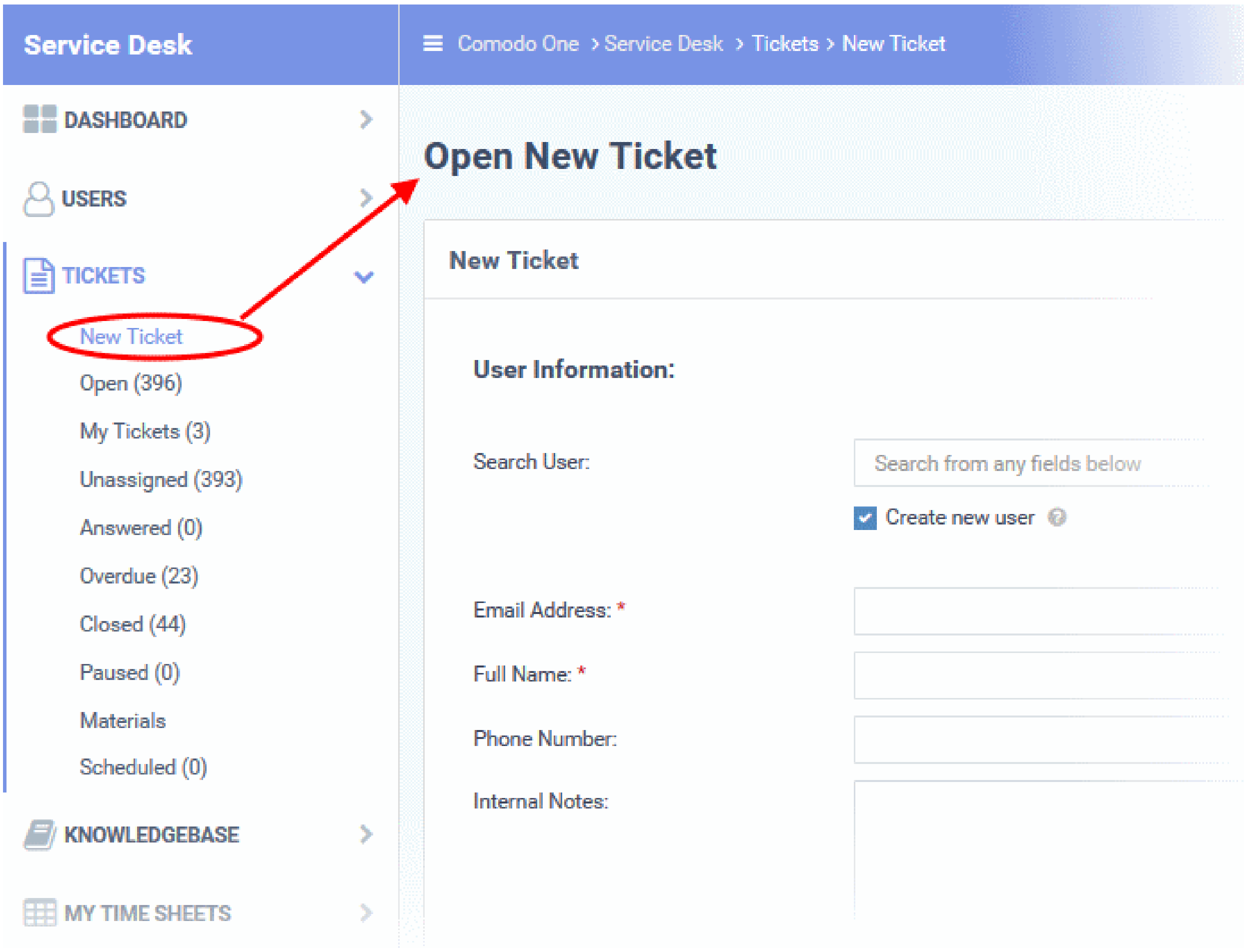
Create a new ticket on behalf of a user

- 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:

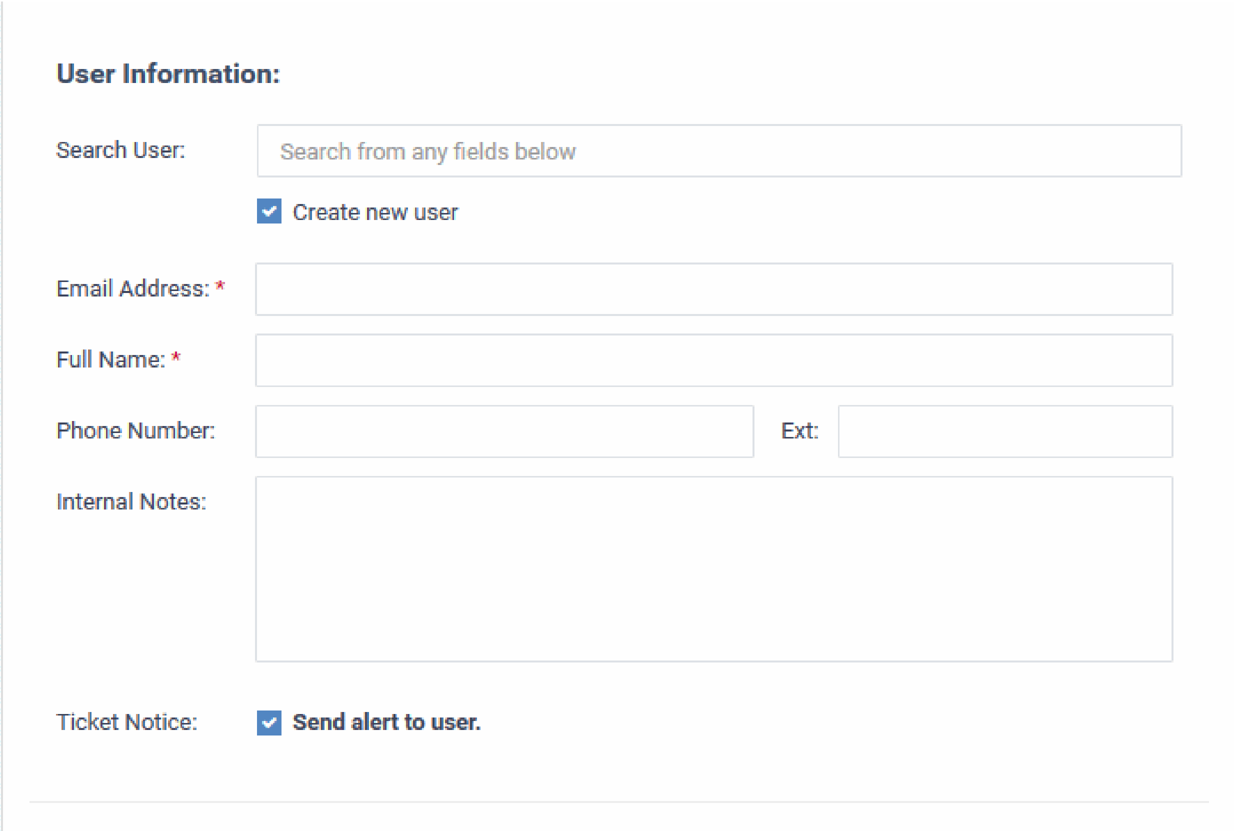


It contains the following sections:

- **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

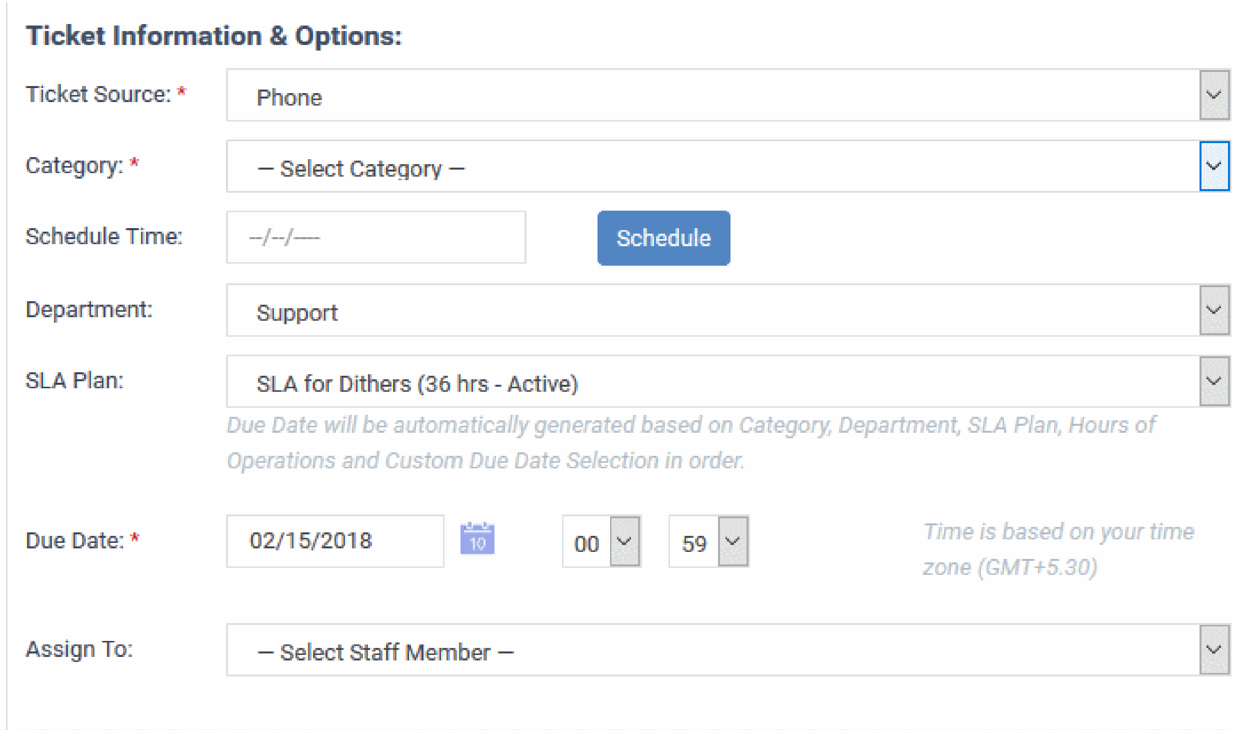


- To create a ticket for an existing user:
  - Start typing the user name or email ID in the search field and choose the user from the suggestions.
  - The details like email address, username, phone number will be auto-populated.
- To create a ticket for a new user
  - Enter the email address, full 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 **Manage Users** for more details.

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

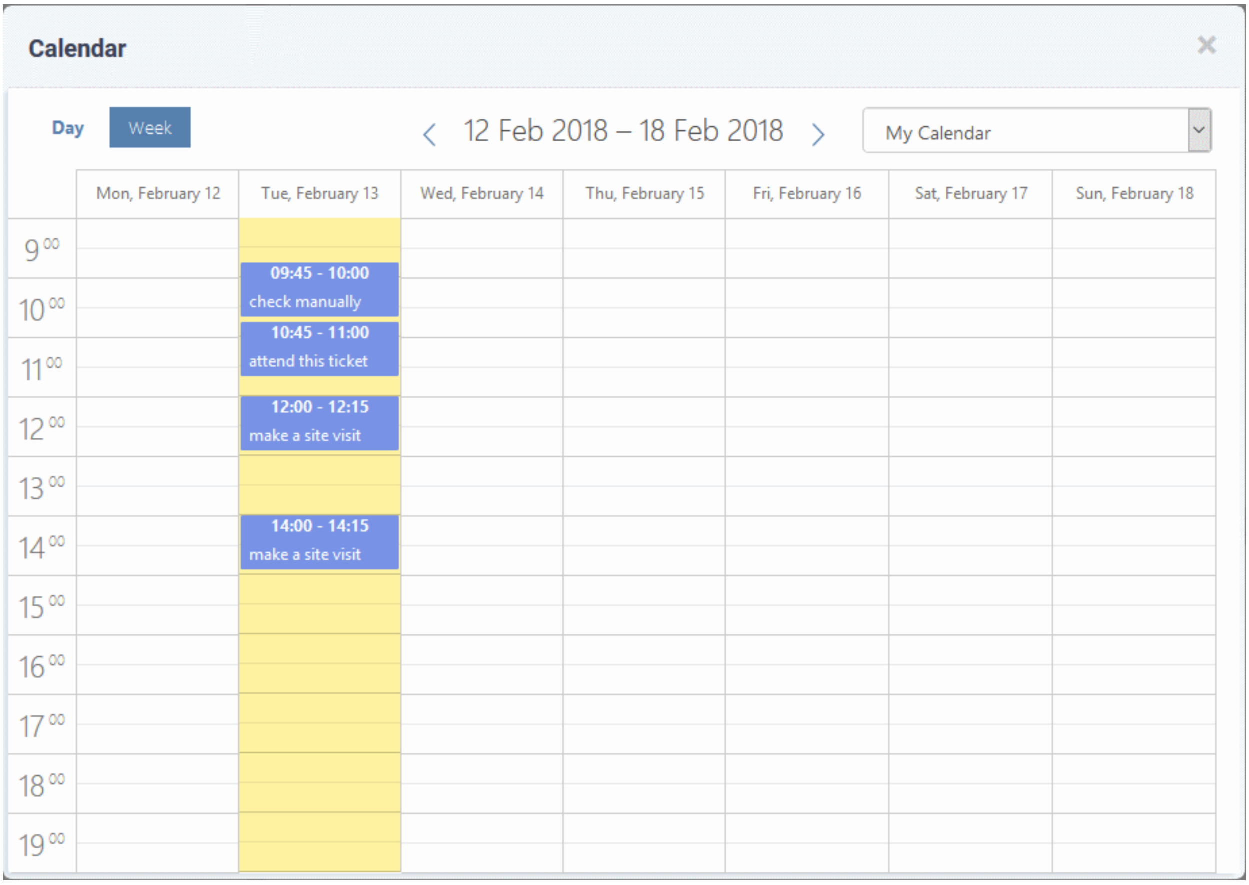
Ticket Information & Options



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

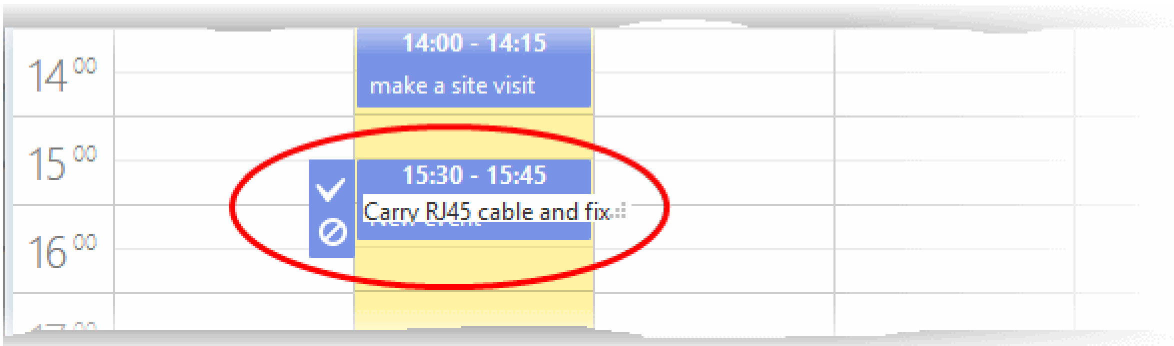
To set a schedule

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

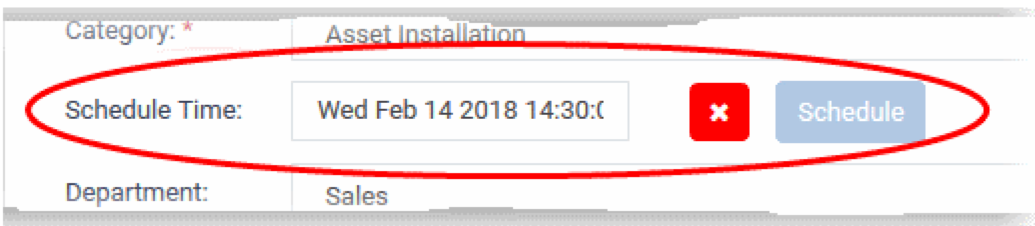


- The current week is shown by default. You can view the current week or day by clicking the respective button above the calendar.
- To move to next week/day, use the '>' buttons on the top

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



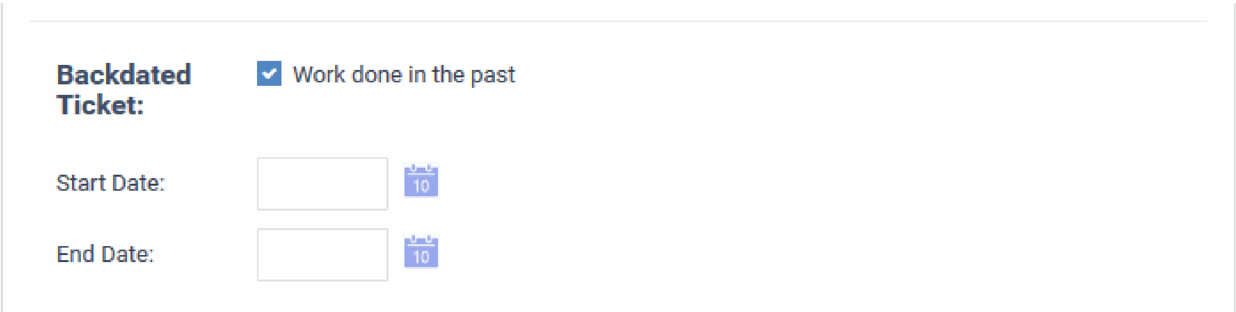
- Click the tick mark to save the schedule
- The schedule will be added and displayed:



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

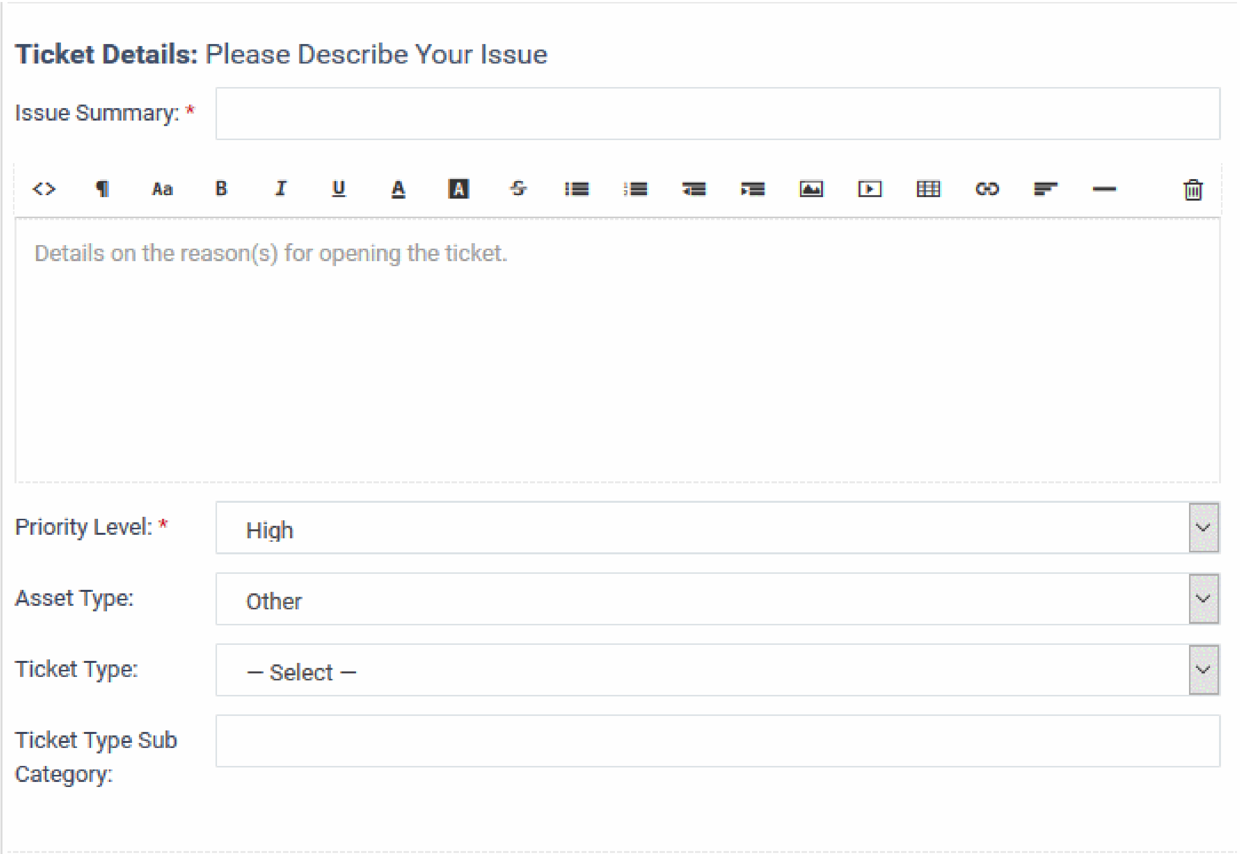
- **Department:** Select the department to which the new ticket should be assigned. The option chosen here will prevail even if the 'Department' for the selected 'Ticket Category' is different. If required, staff can change the department while the ticket is in progress. See **Ticket Details** for more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

Backdated Ticket



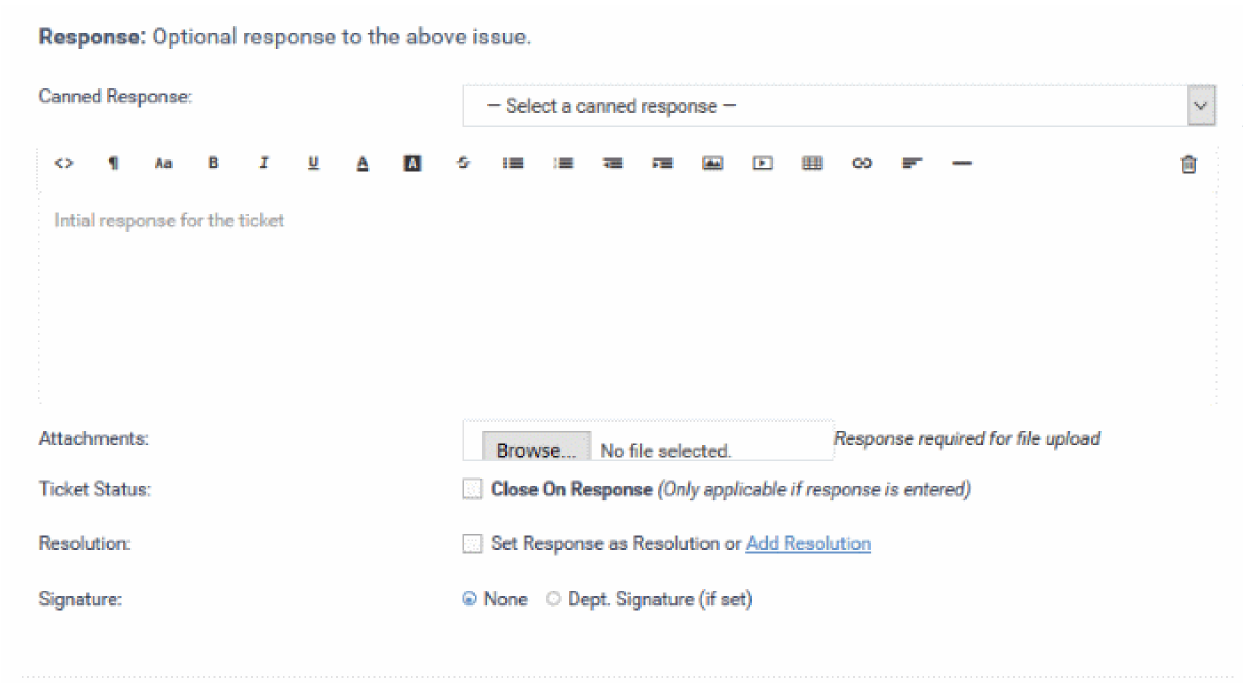
- **Work done in the past -** Select only if you are creating a ticket for a resolved issue that did not have a ticket originally. The ticket will be created with a status of 'Closed'.
  - After selecting this option, enter the start and end dates of the task using the the calendar icons. Make sure that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

Ticket Details



- **Issue Summary:** Enter a brief description of the issue.
- **Issue Details:** Enter a more detailed description of the issue in the text editor. Click the trash can icon above the editor to clear the field.
- **Priority Level:** Ticket criticality.
  - The option chosen here will prevail even if the 'Priority' for the selected 'Ticket Category' is different.
  - Staff can change the priority while the ticket is in-progress. See **Ticket Details** for more details.
  - See **Appendix 2 - Ticket Priorities** if you need help with priorities.
- **Asset Type:** The type of item that the ticket concerns. For example, 'Workstation', 'Server', 'Printer', 'Mobile'.
- **Ticket Type:** Select the type of category for the ticket. The options available are 'Alert', 'Order' and 'Problem'.
- **Ticket Sub Category:** Type a specific sub-set if you wish to refine the 'Category' further. Sub-categories can be used to more details about the category. For example, 'Overheating' may be a sub-category of 'Problem'.

Response



- It is optional to create a response. Type any response you wish to send to the user in the text field provided. Responses will be automatically sent to the user after you click 'Open'.
- **Canned Response:** Select if you wish to want to send a pre-defined response to the ticket.
    - Any canned responses you select will be added to the 'Response' text field. You are free to edit and/or add text to complement the canned response.
    - You can add multiple canned responses to build a more complete answer. For example, you might add the following 3 canned responses to a single response - 'Acknowledgment', 'Ticket has been queued', 'Contact details'. Please enter a carriage return between each canned response for formatting reasons.
    - See **Canned Responses** for more details about creating canned responses.
- **Attachments:** Click the 'Browse' button to add relevant attachments to the ticket. To remove the attachment, clear the checkbox next to the file and select 'OK' in the confirmation screen.
- **Ticket Status:** If enabled, the ticket will be closed after creation *if* a response has been sent to the user. See the descriptions above for more about responses.
- **Resolution**: Enabled – The answer/response that staff enter will be treated as the resolution statement.
    - OR click 'Add Resolution', if you want to specify a different resolution statement.
- **Signature:** Options are 'None' or 'Dept. Signature'.
    - None - Means you can either send with no signature OR type a custom signature in the editor.
    - '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, reminders, notes to staff who might work on the ticket and more. The internal note will be visible only to the admins/staff who open the ticket and not to the user.
- Click 'Open' to create the ticket on behalf of a user.
- The ticket will be added to the 'Tickets' interface. You or the staff member to whom the ticket is assigned can view/update the ticket by clicking the subject or ticket number.

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

Sorting and Filtering Options in the 'Tickets' Interface

Sorting items

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

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

Search Options

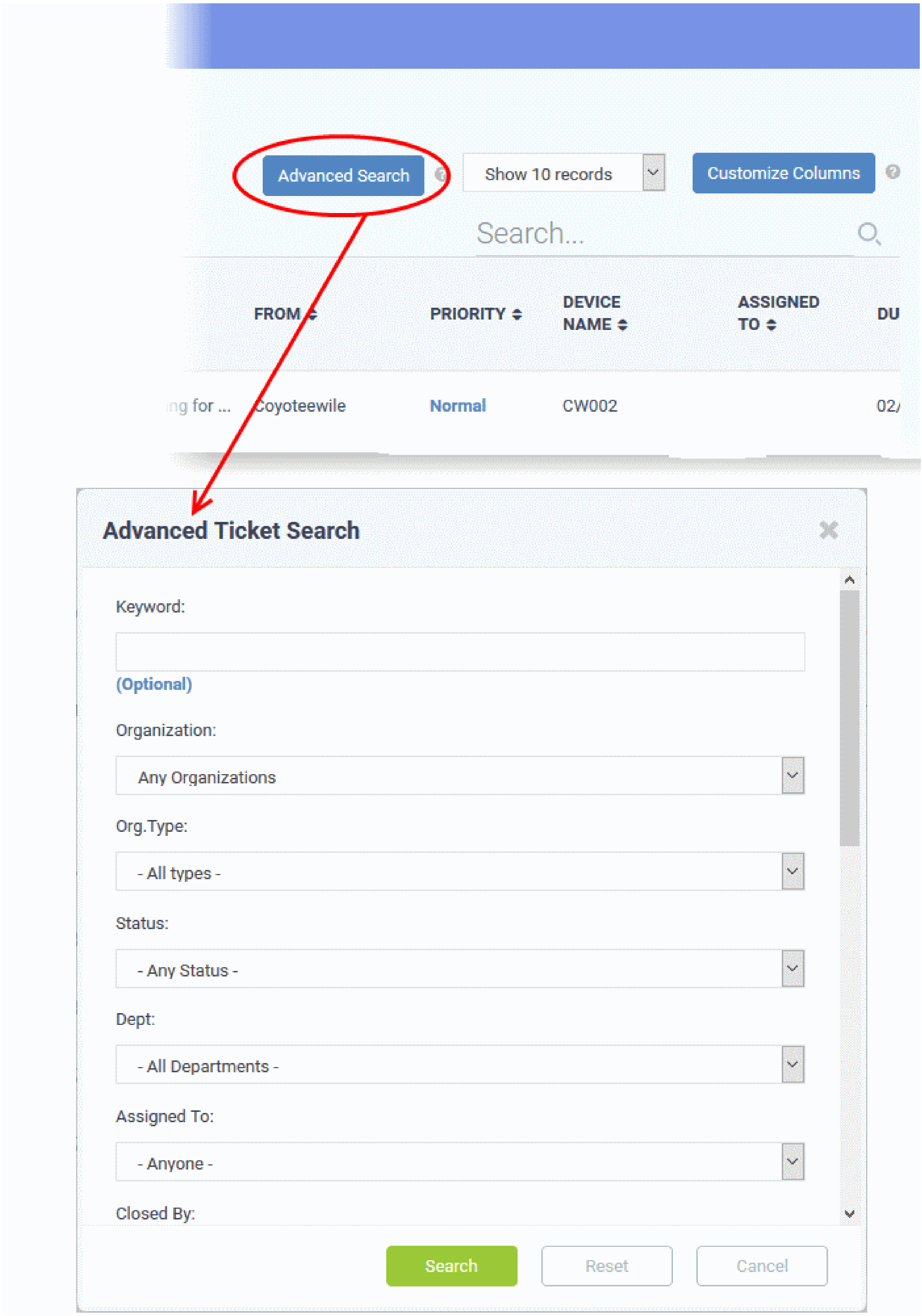
You can run a simple search or an advanced search on tickets.

Simple Search

- The 'Search' field lets you filter tickets by the following criteria:
    - Ticket ID
    - User name
    - 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).

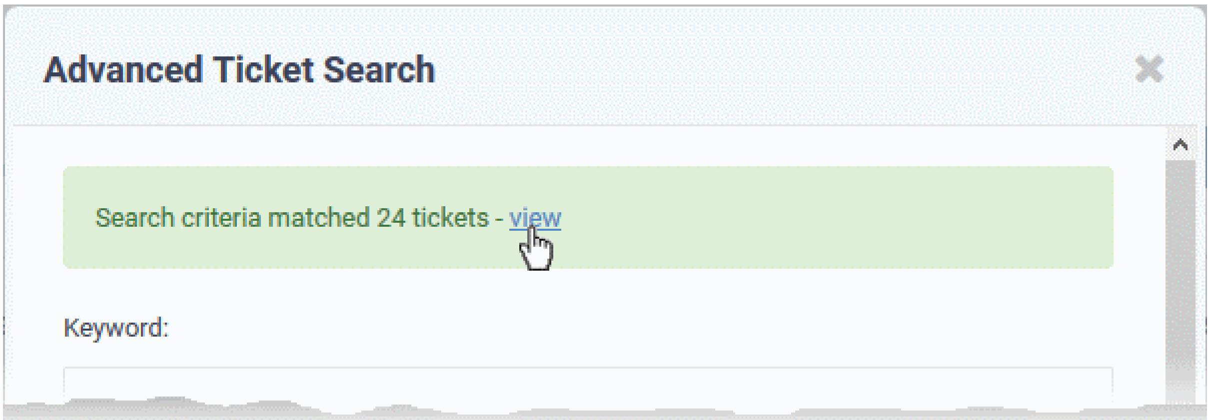
Advanced Search

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



- 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

3.3.1 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:

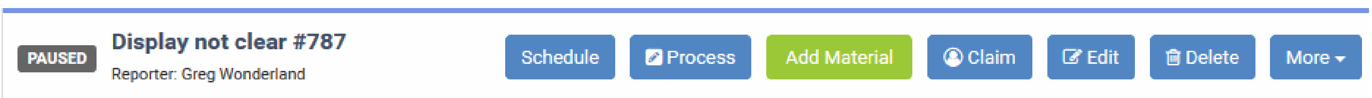
- **Title bar** - Shows basic ticket details and contains controls to manage the ticket. See '**Manage the Ticket**' for more details.
- **Ticket Information** - General details about the ticket.
- **Ticket Workflow** - Appears only for multi-stage tickets. Displays the status of successive stages of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

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** 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 while resolving 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**

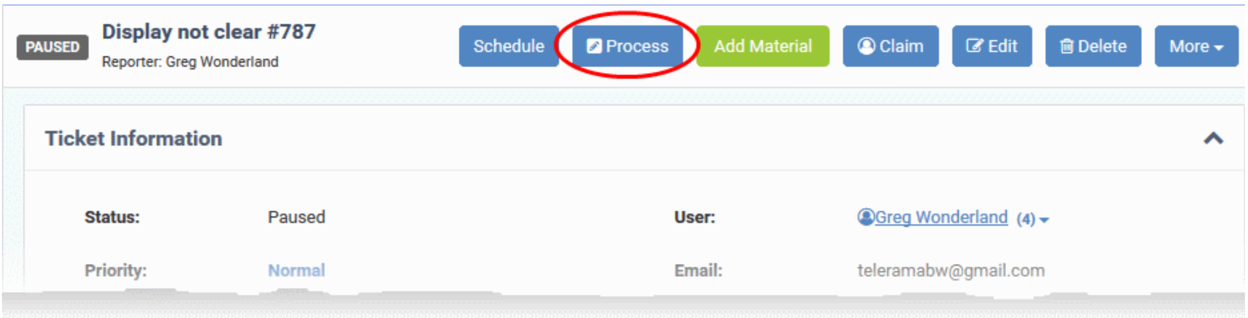
Process the Ticket

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

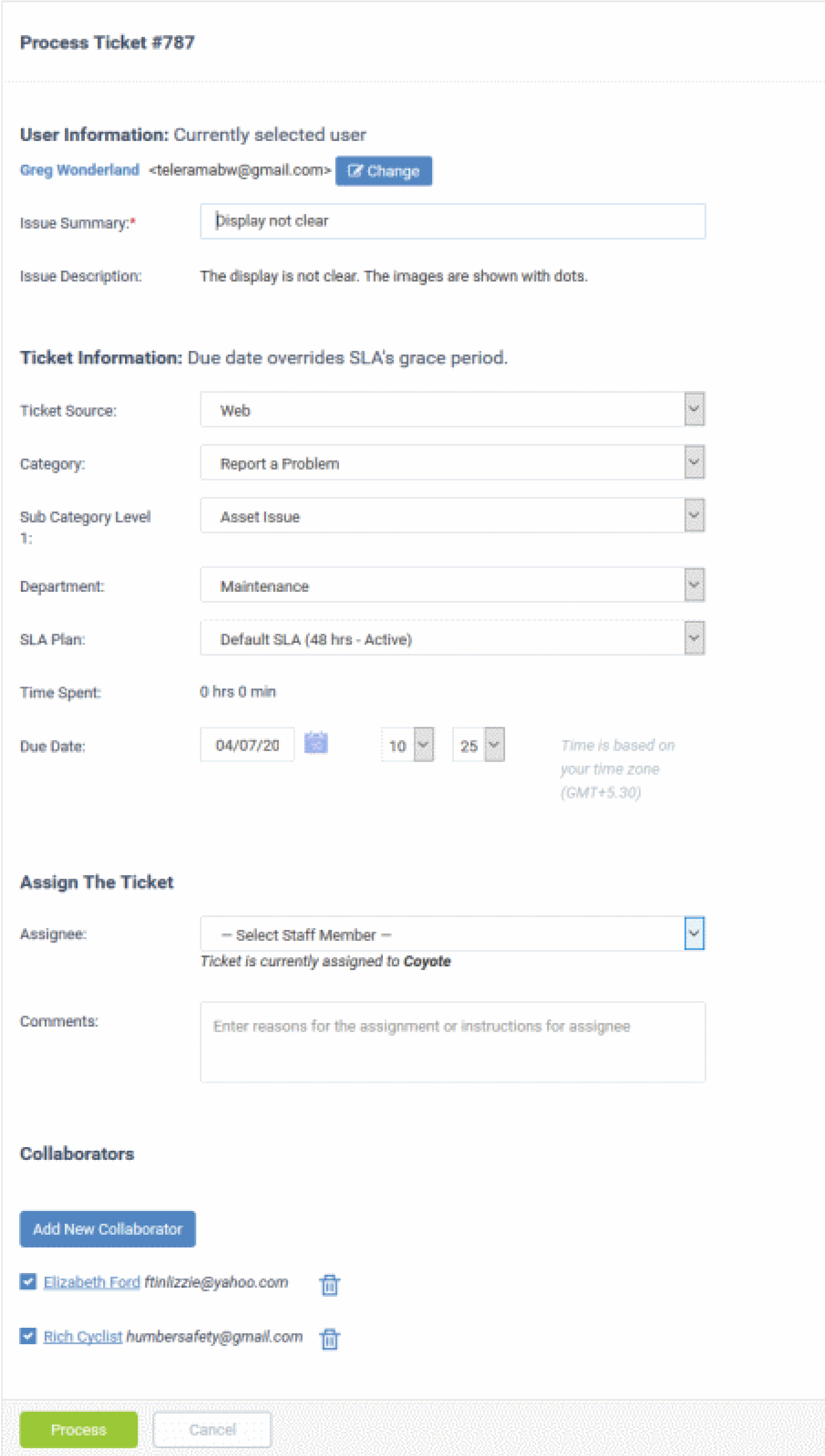
Tip: You can also process a ticket without opening it. See **Process a Ticket** in **Manage Tickets** for more details.

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.



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 '**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 to the ticket is currently assigned. This is pre-populated and can be updated if required. See '**Departments**' 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:

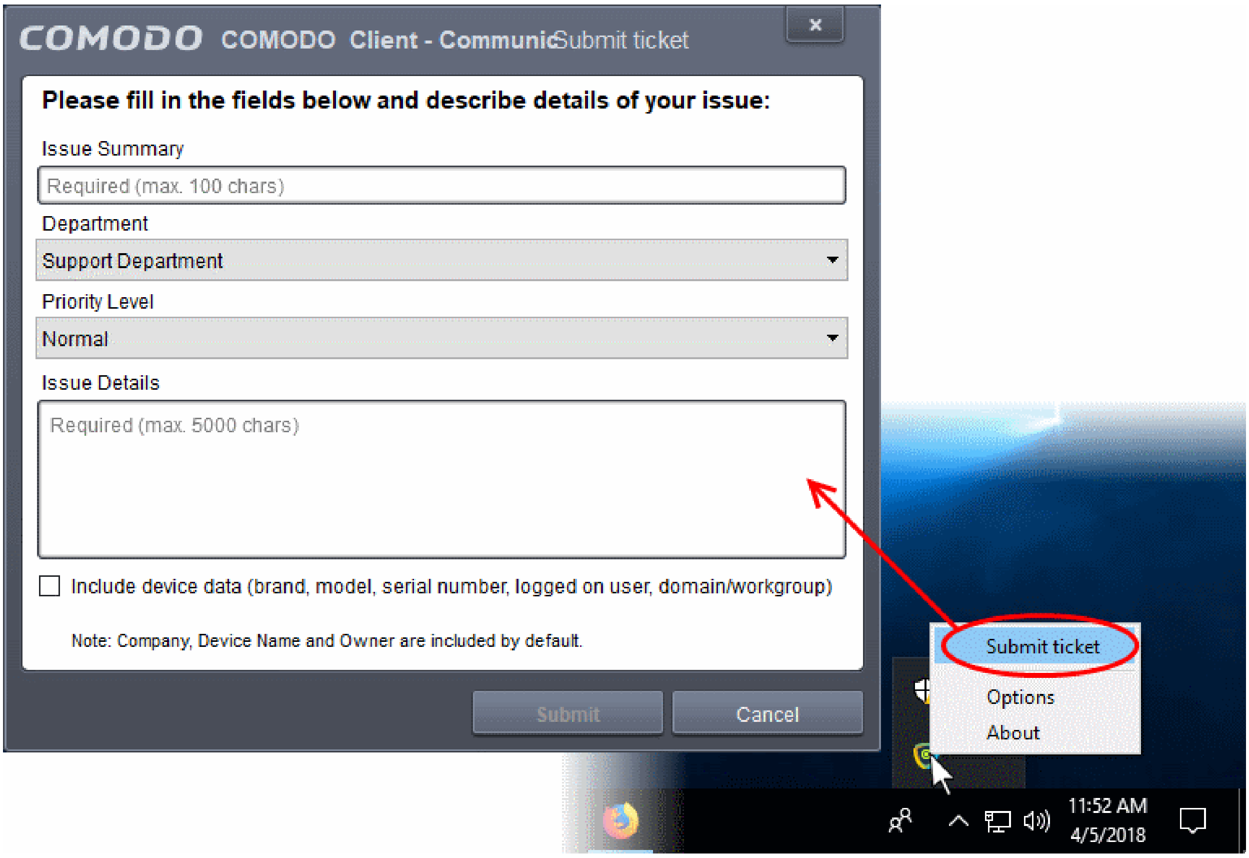
  - Enter their full name, email address and other details
  - Click 'Add User'
  - Repeat the processes above to add more collaborators

- 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 can monitor endpoints and generate a ticket if certain conditions are met. For example, a ticket might be generated if RAM usage exceeds 90%.
  - **Manual** – Endpoint users can create a ticket by right-clicking the ITSM system tray icon:



- 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

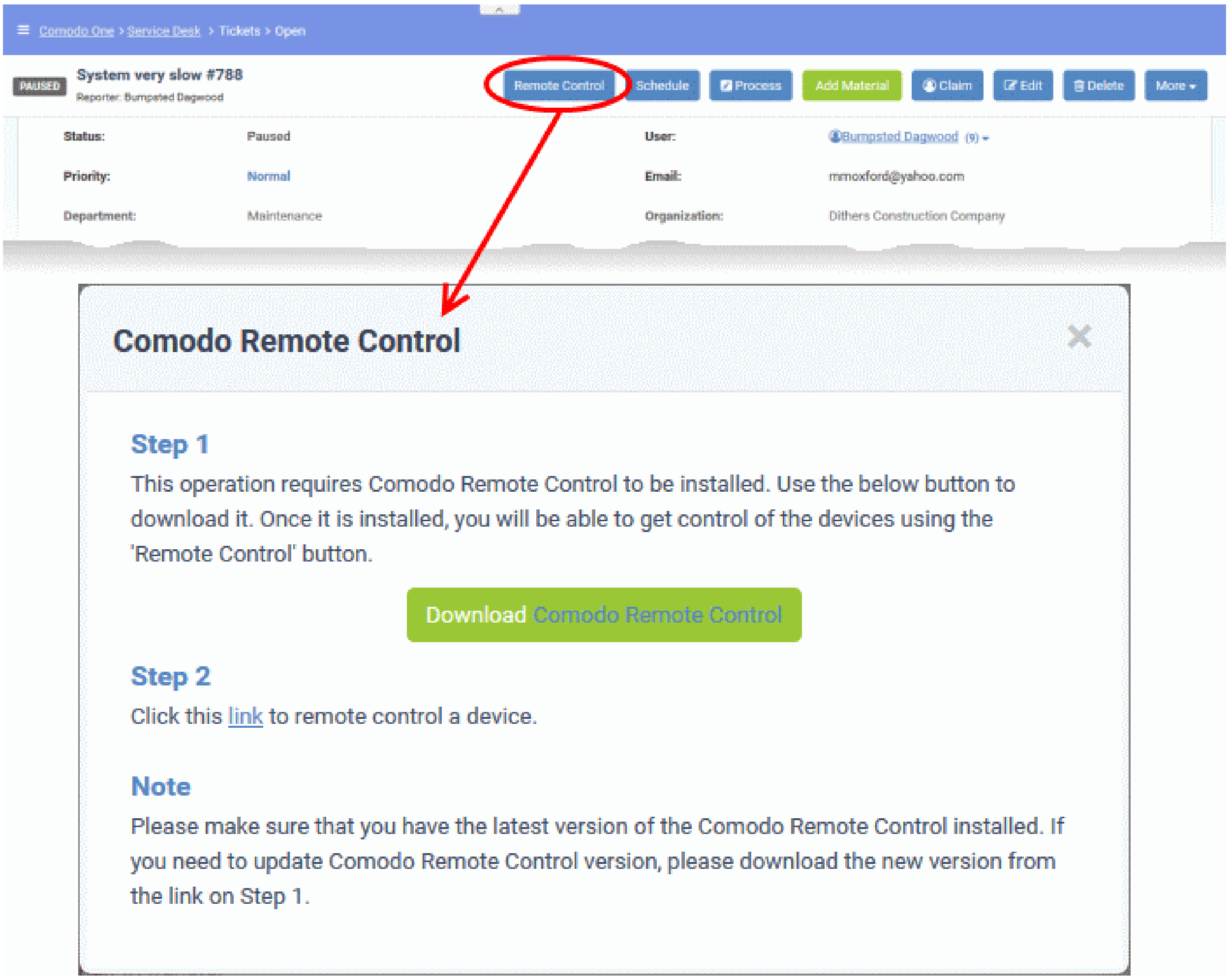
The Comodo Remote Control (CRC) application can be downloaded in two ways:

- **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

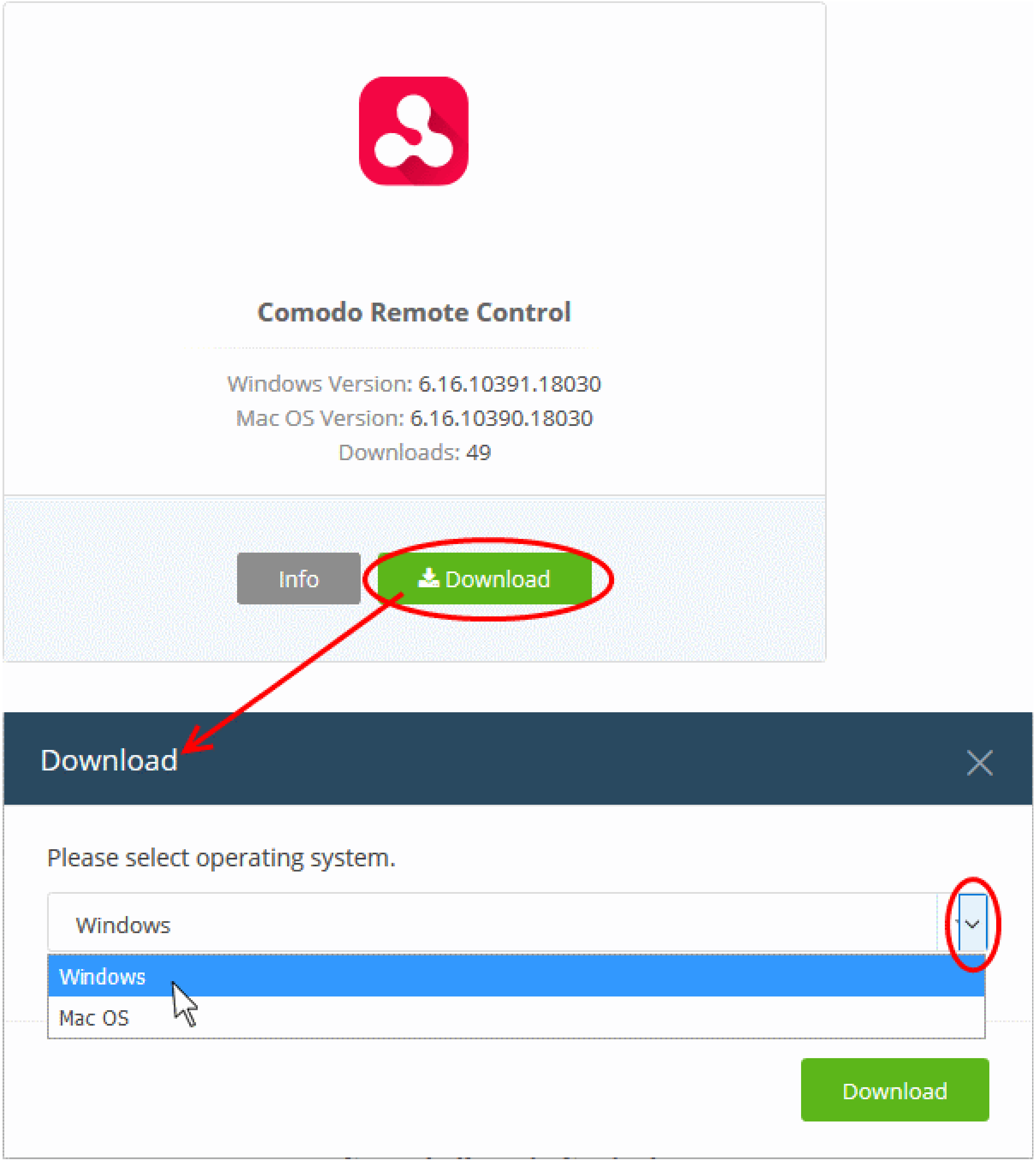
Reminder: The 'Remote Control' button will be available only for tickets generated by the ITSM module.



- 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

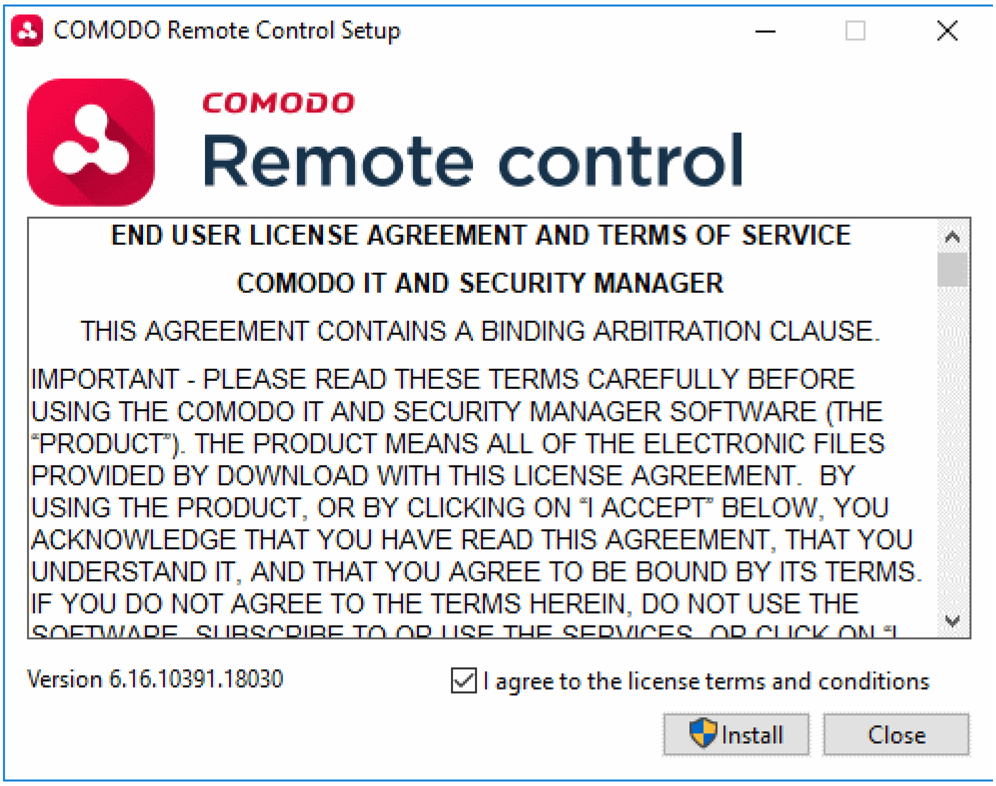


The 'Download' dialog will appear.

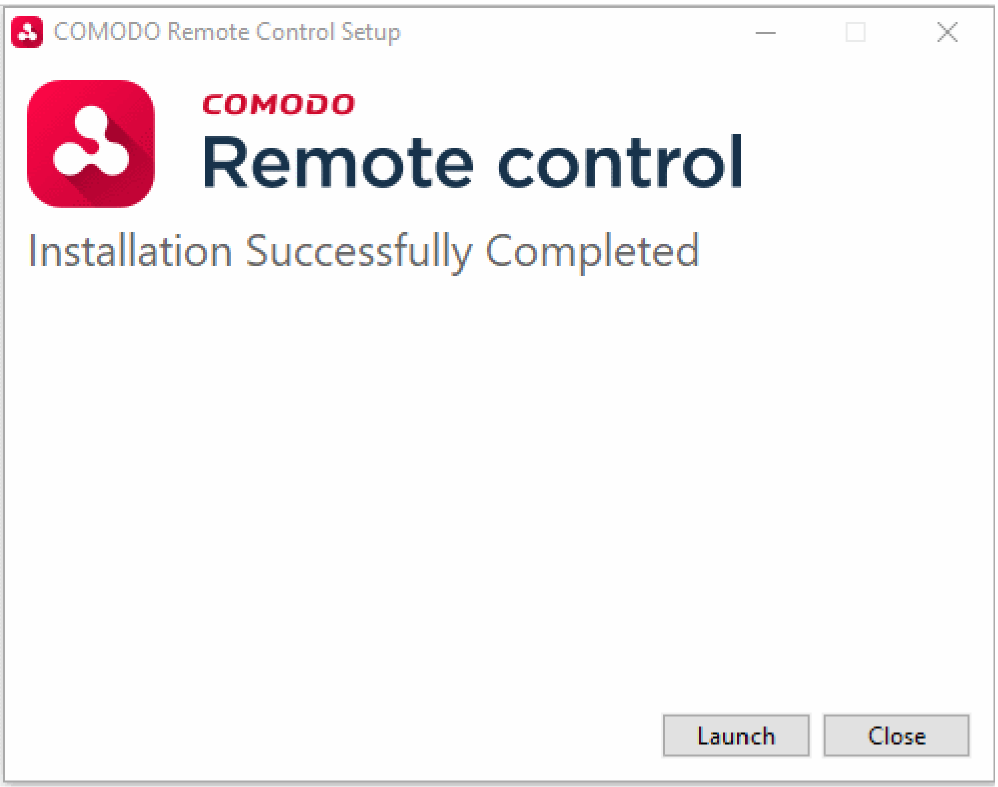
- Select the operating system of your admin machine, click 'Download' and save the setup file.

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

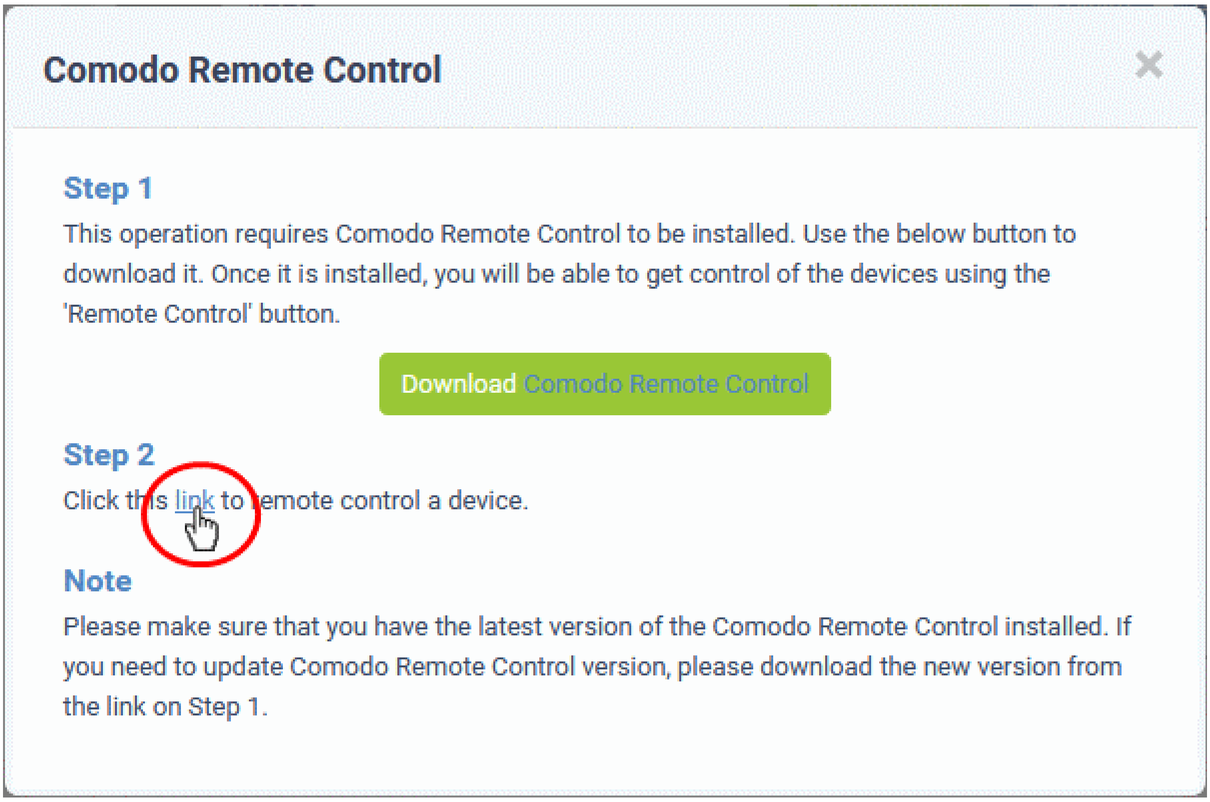
- Once CRC is installed, you can take remote control of a Windows endpoint from the Ticket Details interface.

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

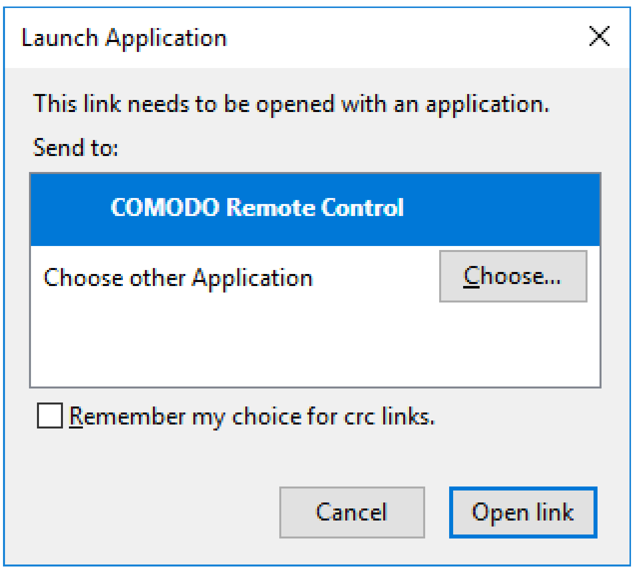
Reminder: The 'Remote Control' button will be available only for tickets generated by the ITSM module.

The 'Comodo Remote Control' dialog will appear:



- Click 'link' under step 2:

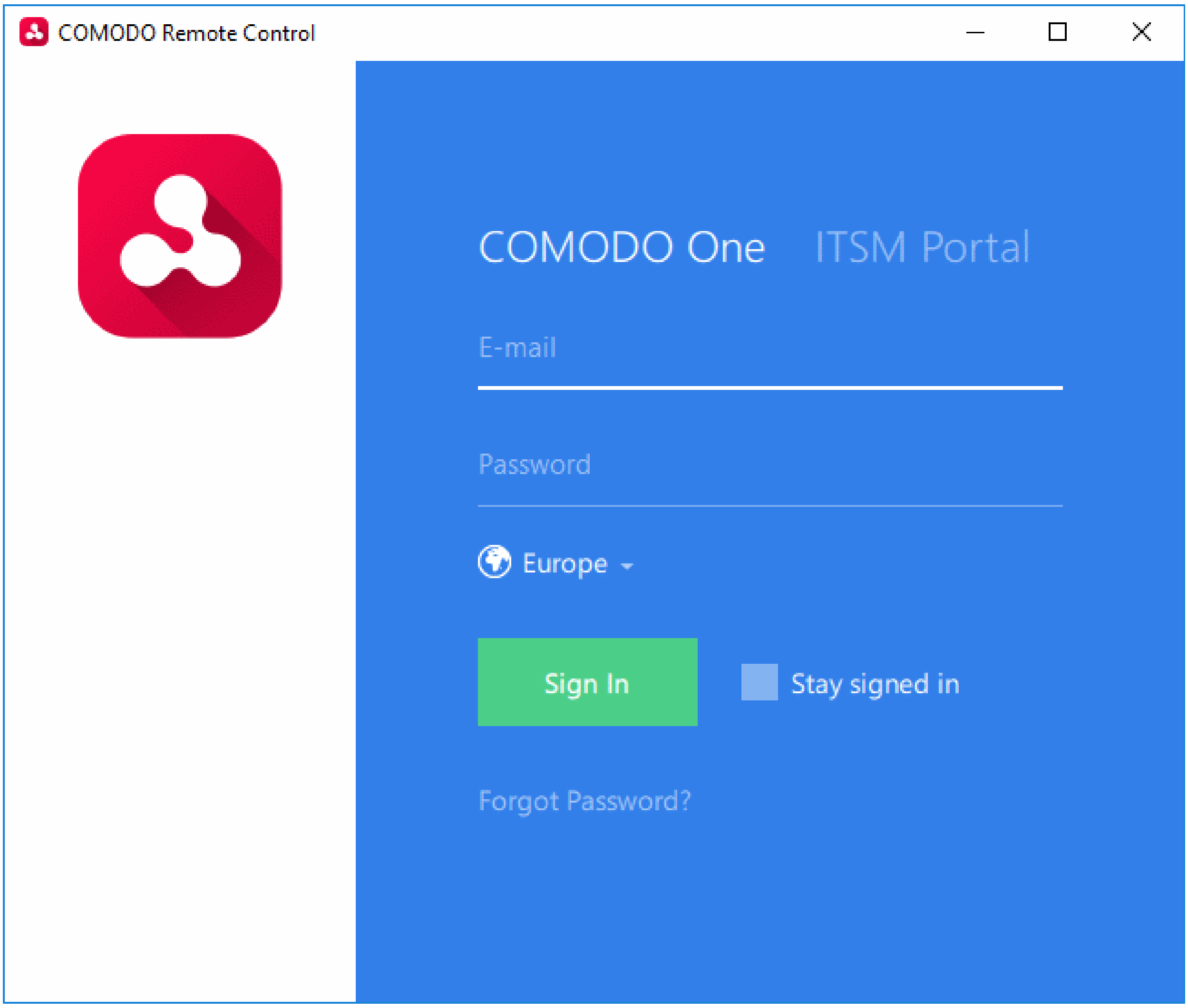
Next, you need to select the application to open the link.



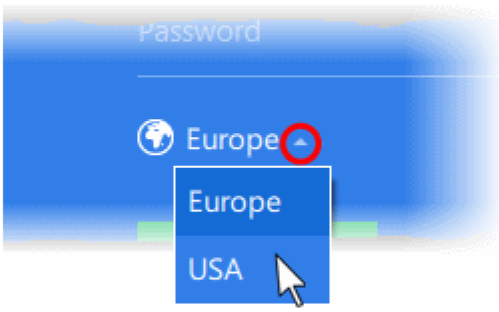
- Leave 'COMODO Remote Control' selected and click 'Open Link' in the 'Launch Application' dialog.

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

The CRC application will start:

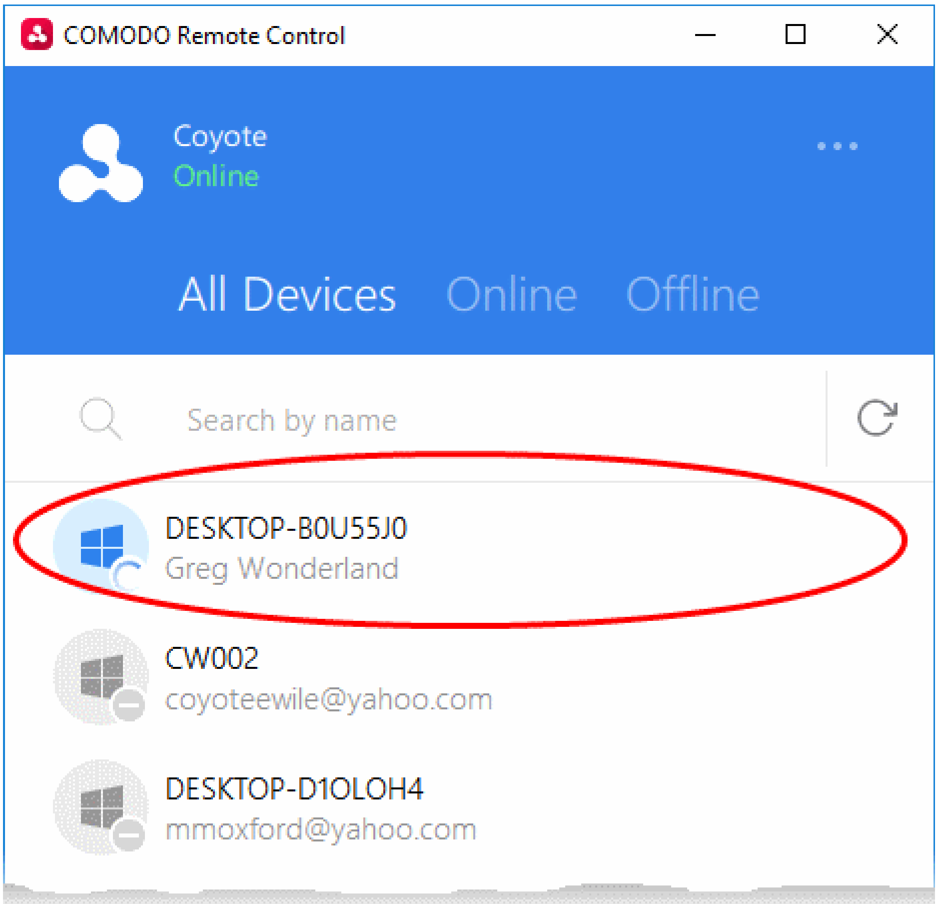


- Click the 'Comodo One' tab then login with your C1 username and password
- The region selector allows you to choose the C1 hosted service closest to your location. Select the location nearest to you for the best performance / fastest connection.



- 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'

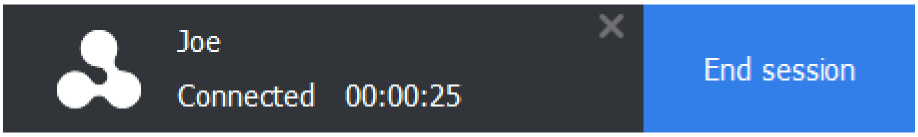
The viewer application will open with a list of enrolled Windows endpoints. The endpoint associated with the ticket is pre-selected for remote desktop connection:



Tip: Alternatively, you can launch the CRC application from your desktop and select the endpoint to be taken remote control

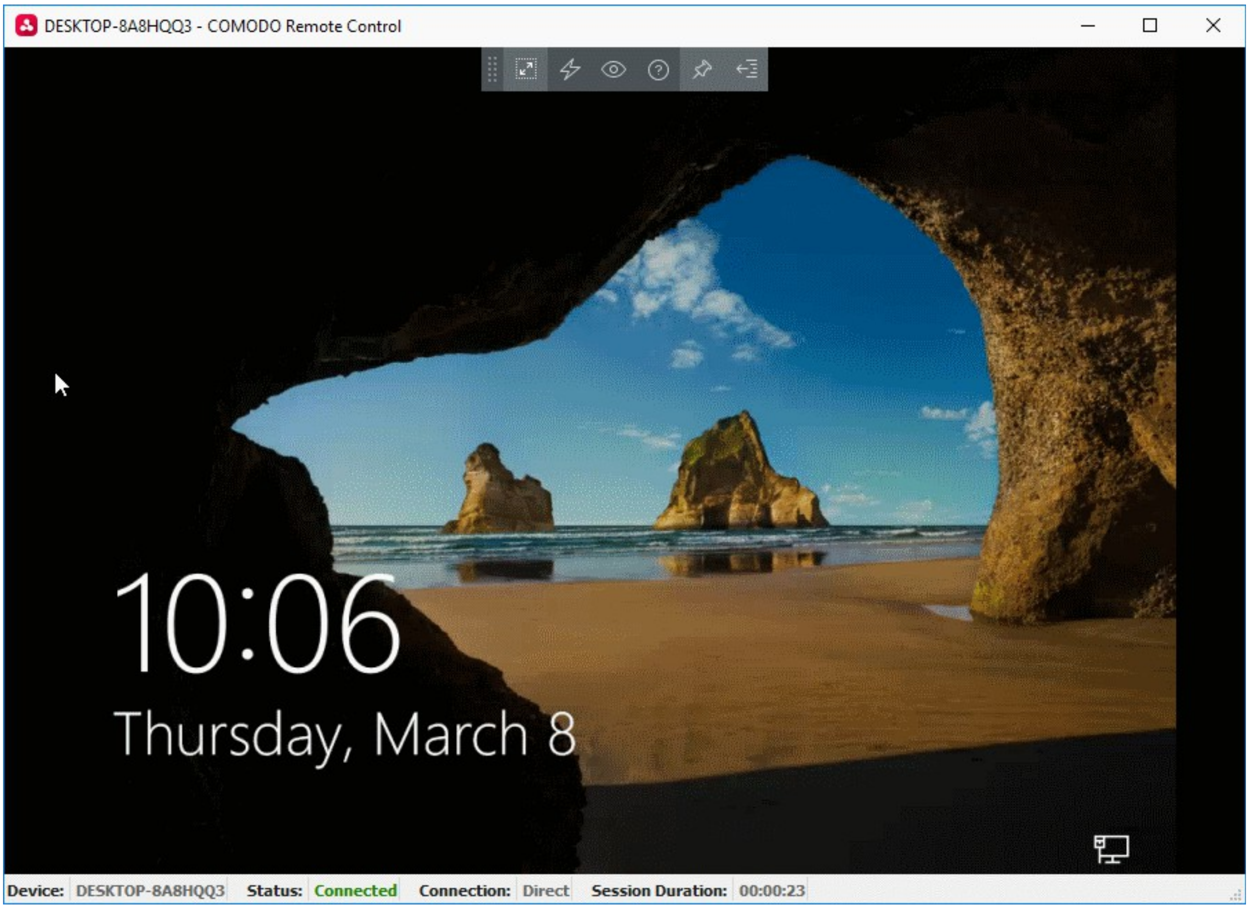
- Double click the desktop shortcut or the system tray icon to open the login screen.
- Login with your C1 username and password
- Select the device you want to manage, from the next screen.

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.

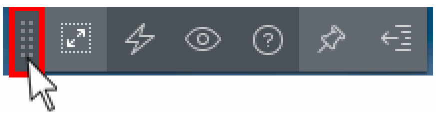
The 'Comodo Remote Control' interface will display the desktop of the remote computer:



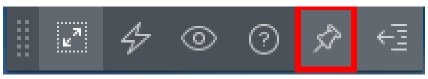
- You can now interact with the target device to perform tasks as required.
- The client interface contains the following menus and settings:

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

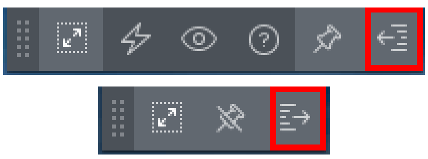
- Click the same icon to exit full screen mode



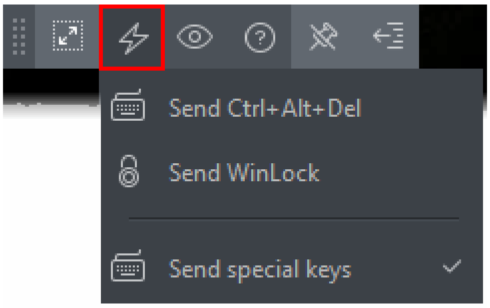
Position - Click and drag the tool bar to your preferred location.



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

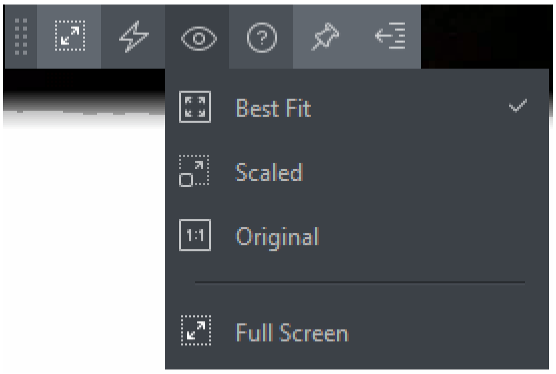


Minimize/Maximize - Show/hide tool bar options.



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

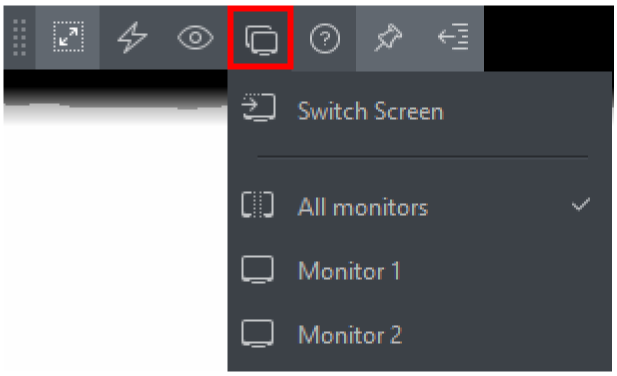
- **Send Ctrl + Alt + Del** - Opens the Windows security screen. This allows you to lock the computer, log the current user out of the remote machine, change passwords, view the local task manager or shut down/restart/hibernate the machine.
- **Send WinLock** - Locks the managed endpoint. A password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

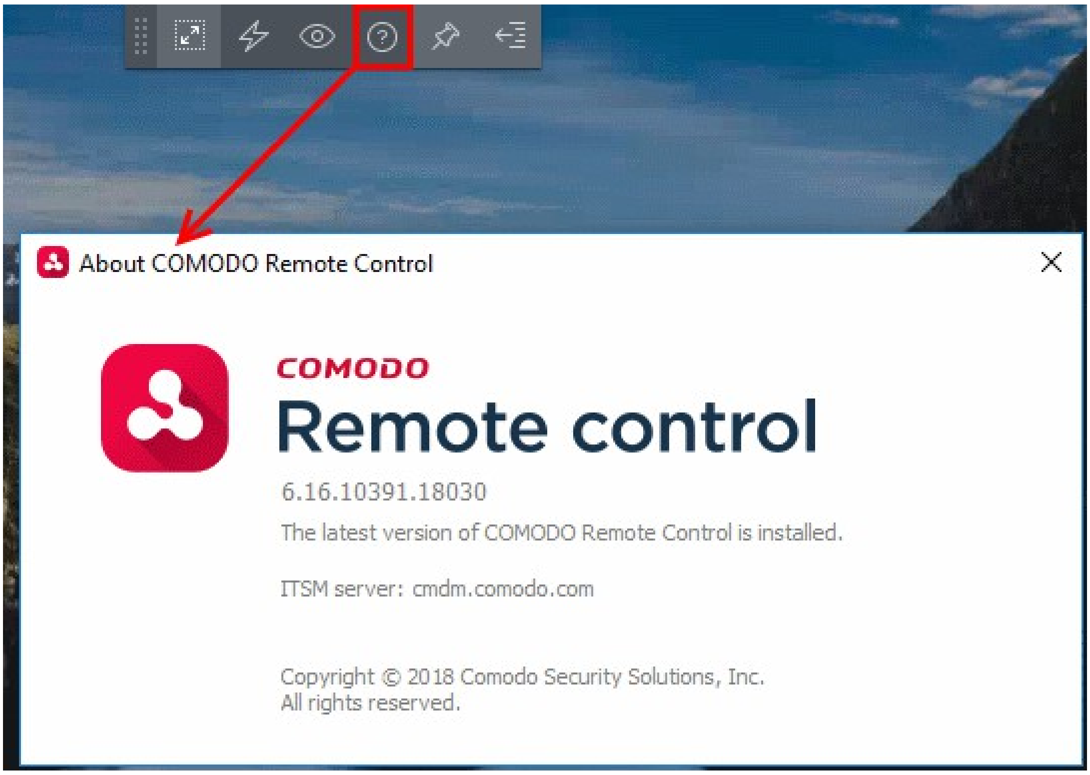
- **Best Fit** - Automatically adjusts the screen resolution for the best visual experience.
- **Scaled** - Displays the target desktop with the resolution of the admin computer
- **Original** - Displays the target desktop at its own resolution
- **Full screen** - Displays the remote desktop in full 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 components, consumables and expenses to a ticket which were used when resolving an issue.

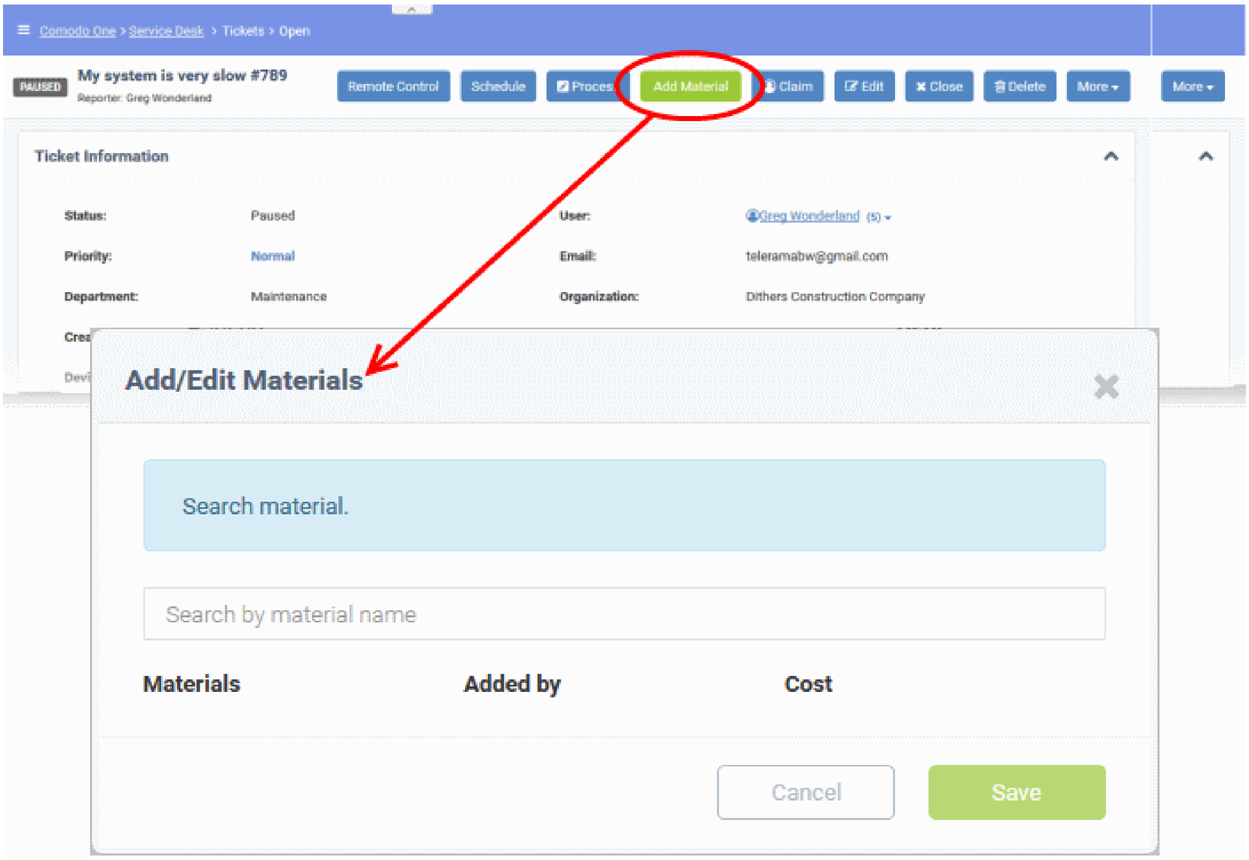
- Materials and expenses added to a ticket need to be approved by an administrator. Only then will they be charged to the customer.
- The 'Material Details' pane in the 'Ticket Details' interface shows all existing materials on the ticket.

Tip:

- Administrators can create a global inventory of materials by going to 'Admin Panel' > 'Manage' > 'Materials'.
- Materials added here will then be available for staff to add to a ticket.
- See **Managing Materials and Expense Types** for more details.

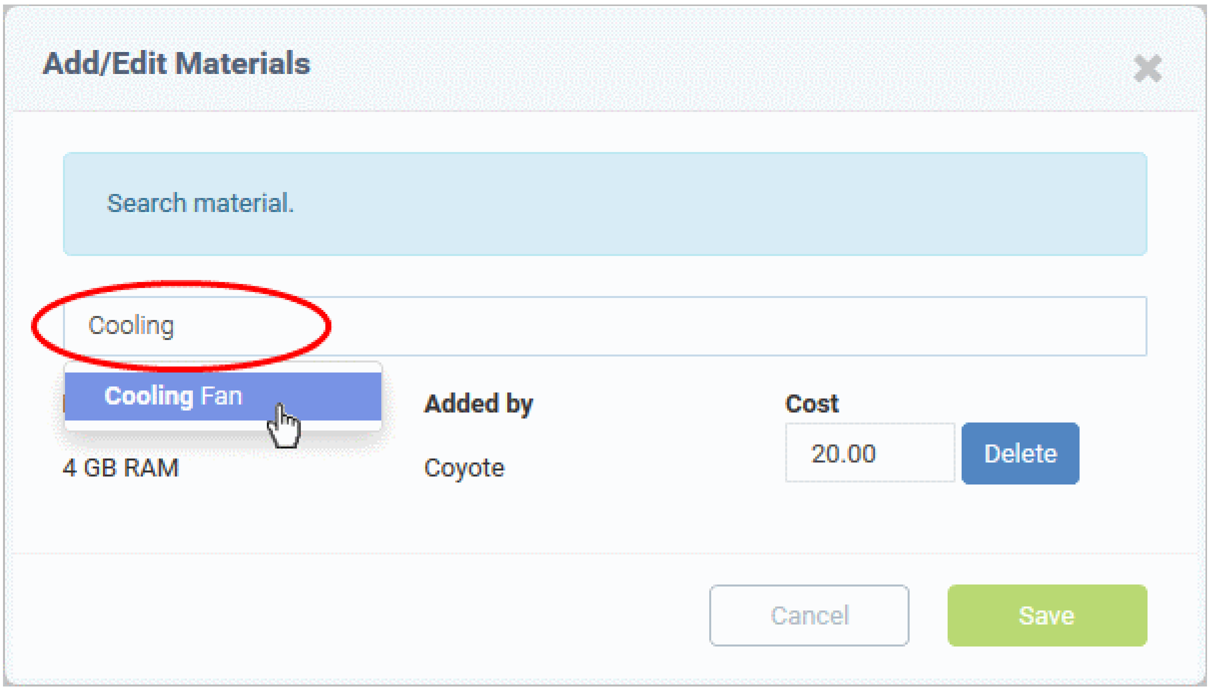
To add a material or additional charges

- Open the ticket details interface by clicking on the ticket number in the 'Tickets' interface
- Click the 'Add Material' button at the top



The Add/Edit Materials dialog will open. Materials added previously, if any, will be displayed as a list.

- Start typing the name of the item in the search dialog and select the material from the options that appear in the drop-down



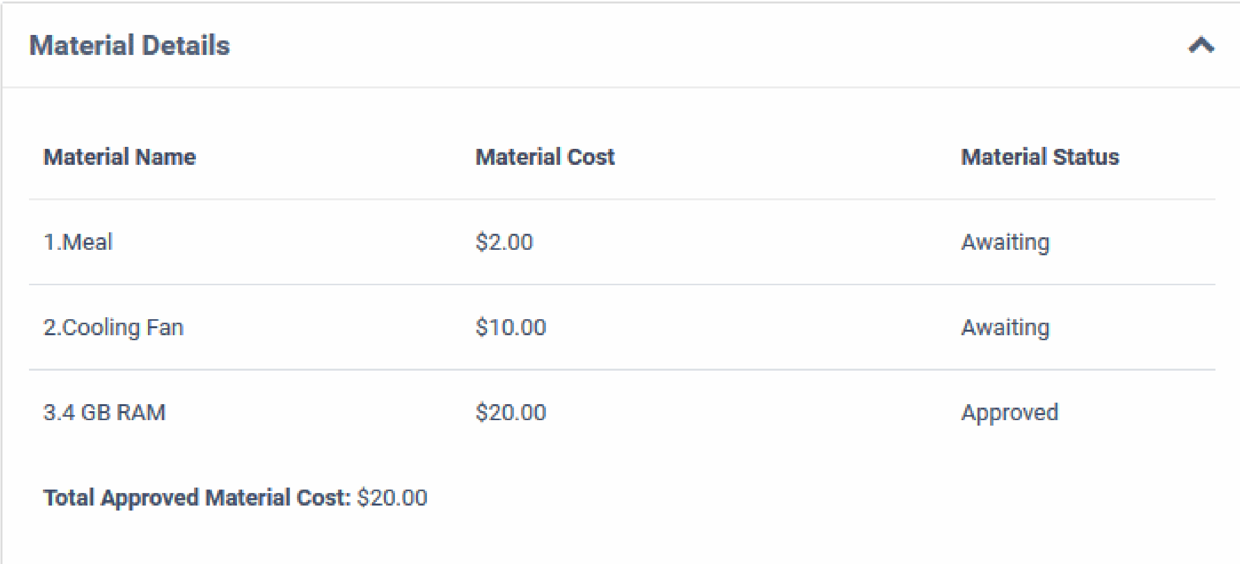
The material will be added to the list.

- Enter the cost of the material or expense in the 'Cost' field.

Note: The cost will be added in the default currency chosen for your account. See **C1 Service Desk System**

Settings for more details.

- Repeat the process to add more items
- Click 'Save' to add the list of items to the ticket
- The items(s) will be added to the list of materials/expenses
- You can view all materials on a ticket by expanding the 'Material Details' pane of 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 will have an approval status of 'Awaiting'.

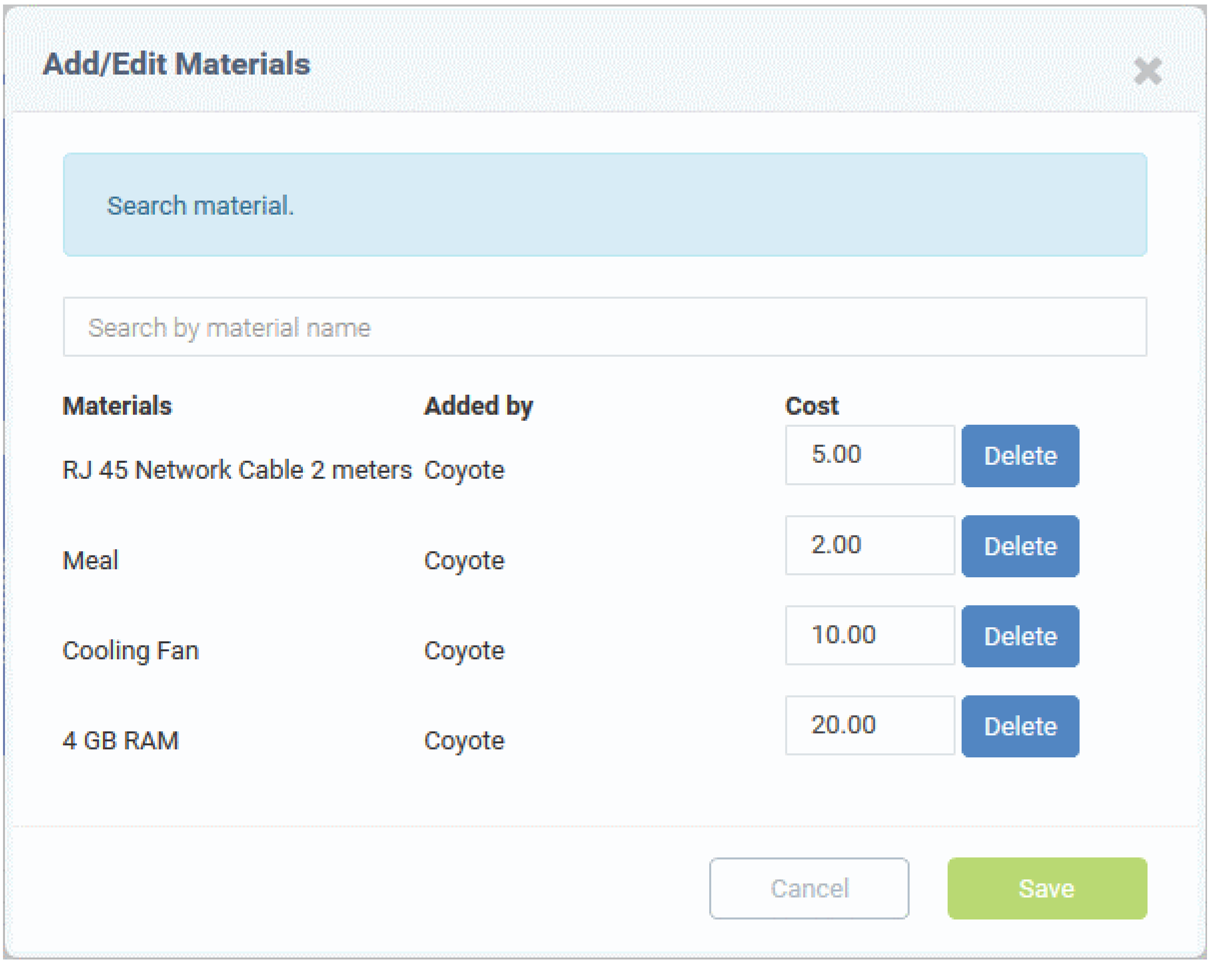
- Admins can approve or reject expense items by going to 'Admin Panel' > 'Staff' > 'Material Approval'.
- See **Material Approval** if you need more help with this.

Tip: Staff can view the materials/expense items that they have added to a ticket by going to 'Staff Panel' > 'Tickets' > 'Materials'. See **View Details of Materials/Expense Items added to Tickets** in the previous section, **Manage Tickets**, for more details.

To add new items, edit prices or remove items from a ticket

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

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



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

Create a Schedule for the Ticket

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

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

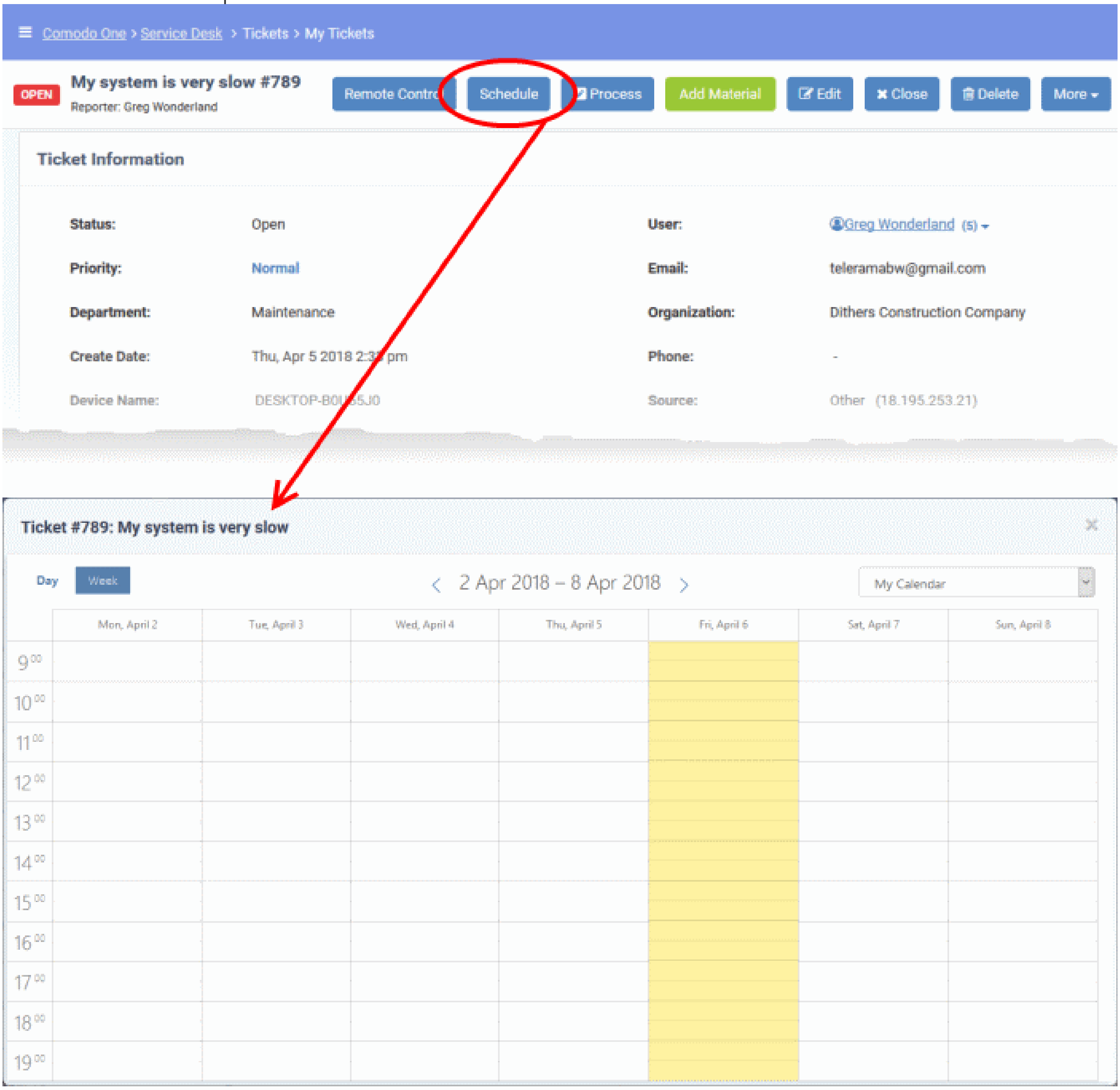
Tip: You can also create a schedule for a ticket without opening it. See **Schedule a Ticket** in **Manage Tickets** for more details.

To create a schedule for the ticket

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

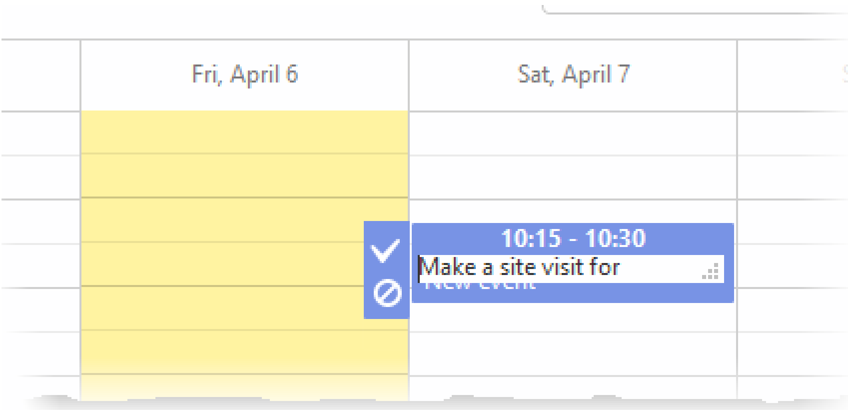
- Click the 'Schedule' button

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



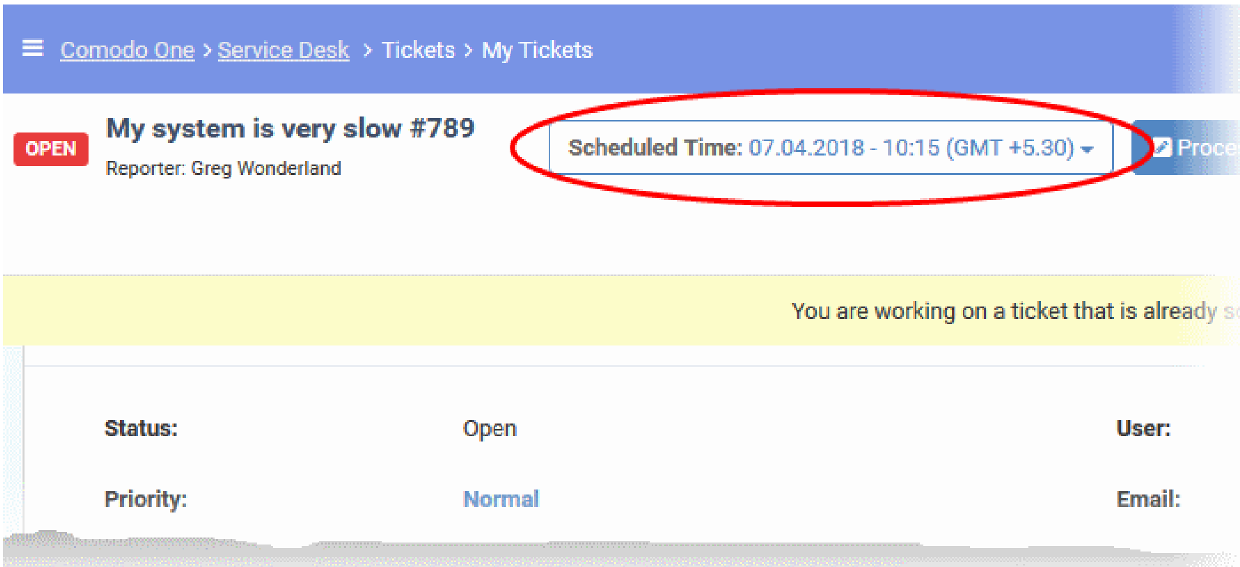
- The current week will be displayed by default. You can view the current week or day by clicking the respective button above the calendar.
- To move to next week/day, use the '>' buttons on the top

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



- Click the tick mark to save the schedule

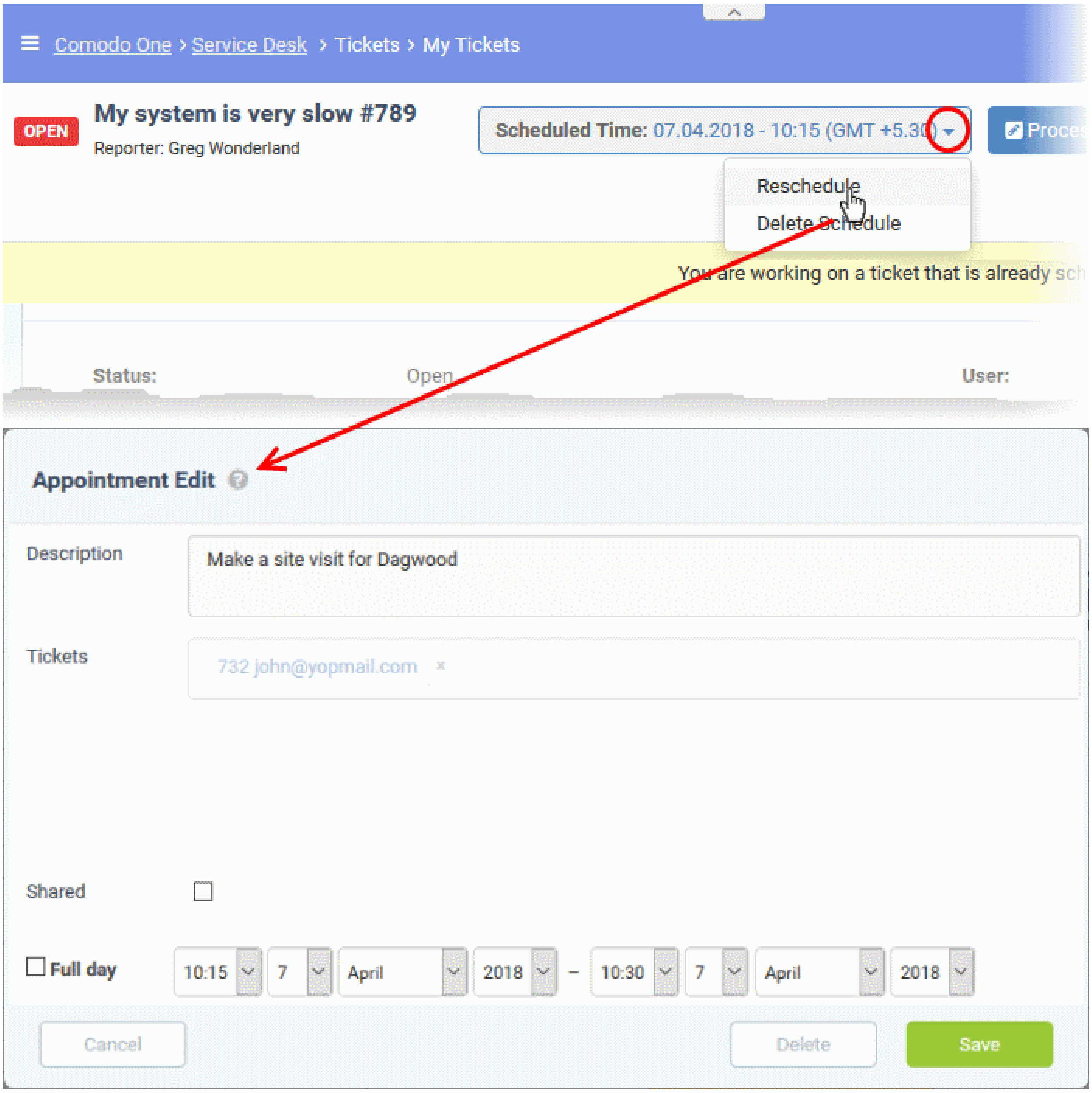
The schedule will be displayed at the top of the 'Ticket Details' screen. You can reschedule or delete the schedule at any time.



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

To change the schedule for a ticket

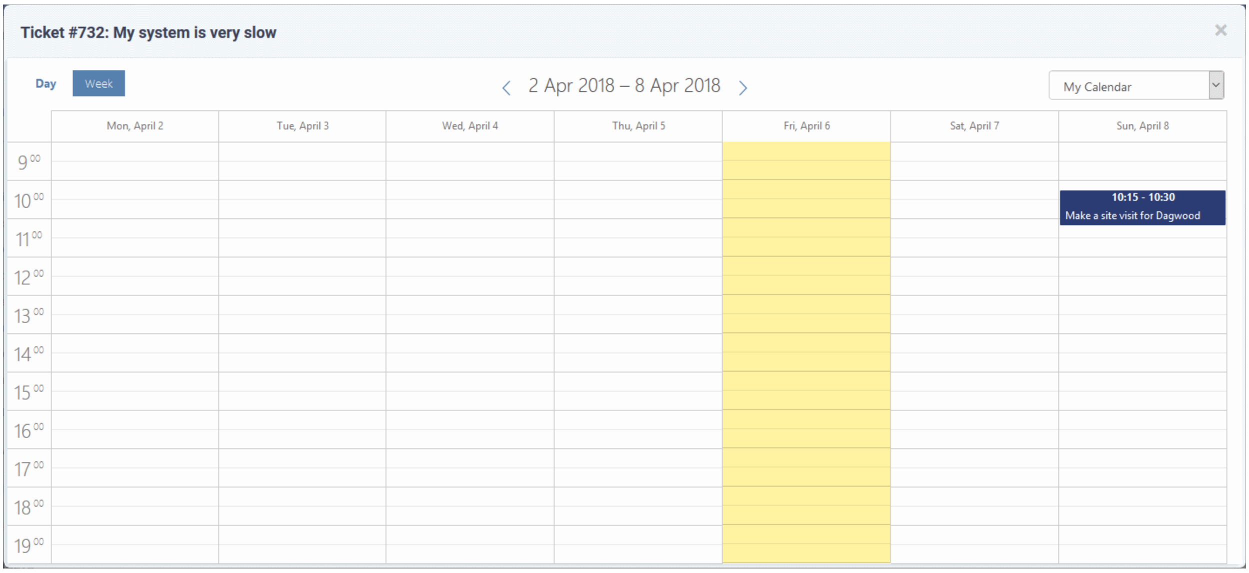
- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Scheduled', 'Open', 'Unassigned', 'Overdue', etc)
- Click the number of the scheduled ticket you want to open
- Click the 'Scheduled Time' box and select 'Reschedule' from the drop-down



The 'Appointment Edit' dialog will open.

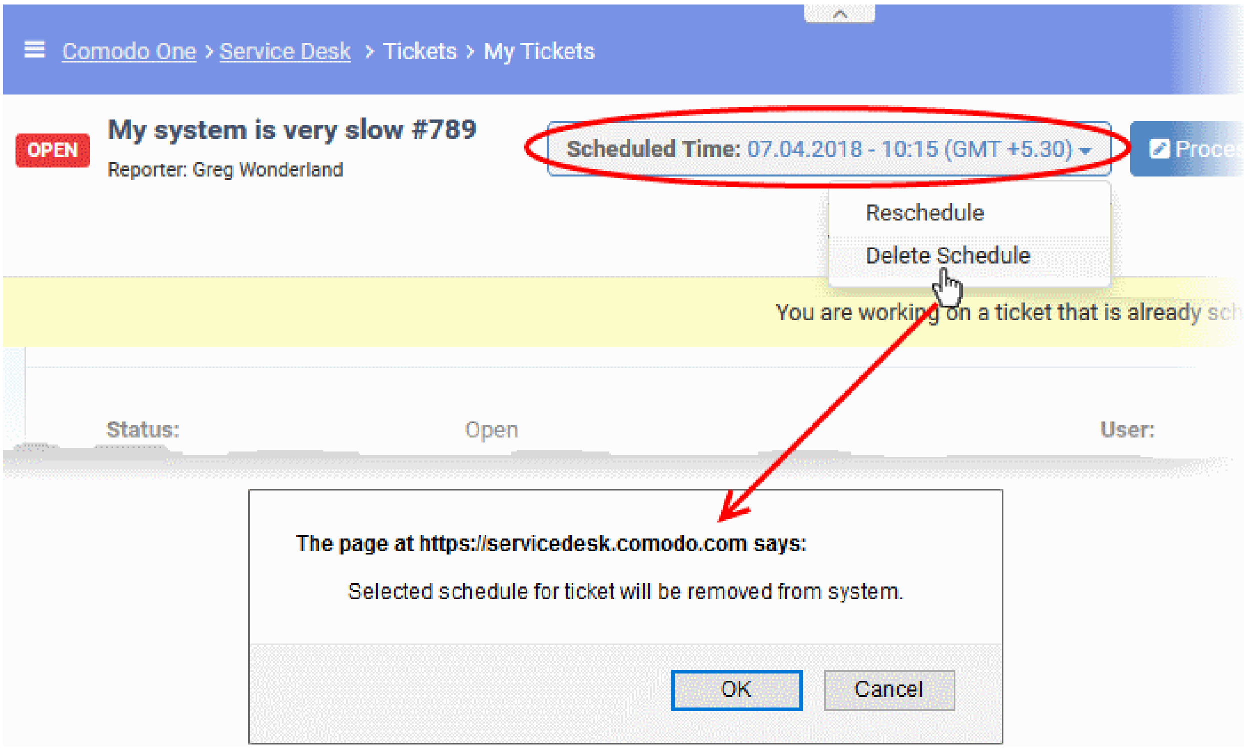
- Description - Task details as entered when creating the appointment. Edit the description as required.
- Tickets - Lists all tickets associated with the appointment. Click the 'X' button at the right to remove the ticket if required.
- Shared - Select whether the appointment should be added to the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

Your calendar will be updated with the new schedule/appointment



To remove a schedule

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



- Click 'OK' in the confirmation dialog

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

Create a Knowledge Base article from a ticket

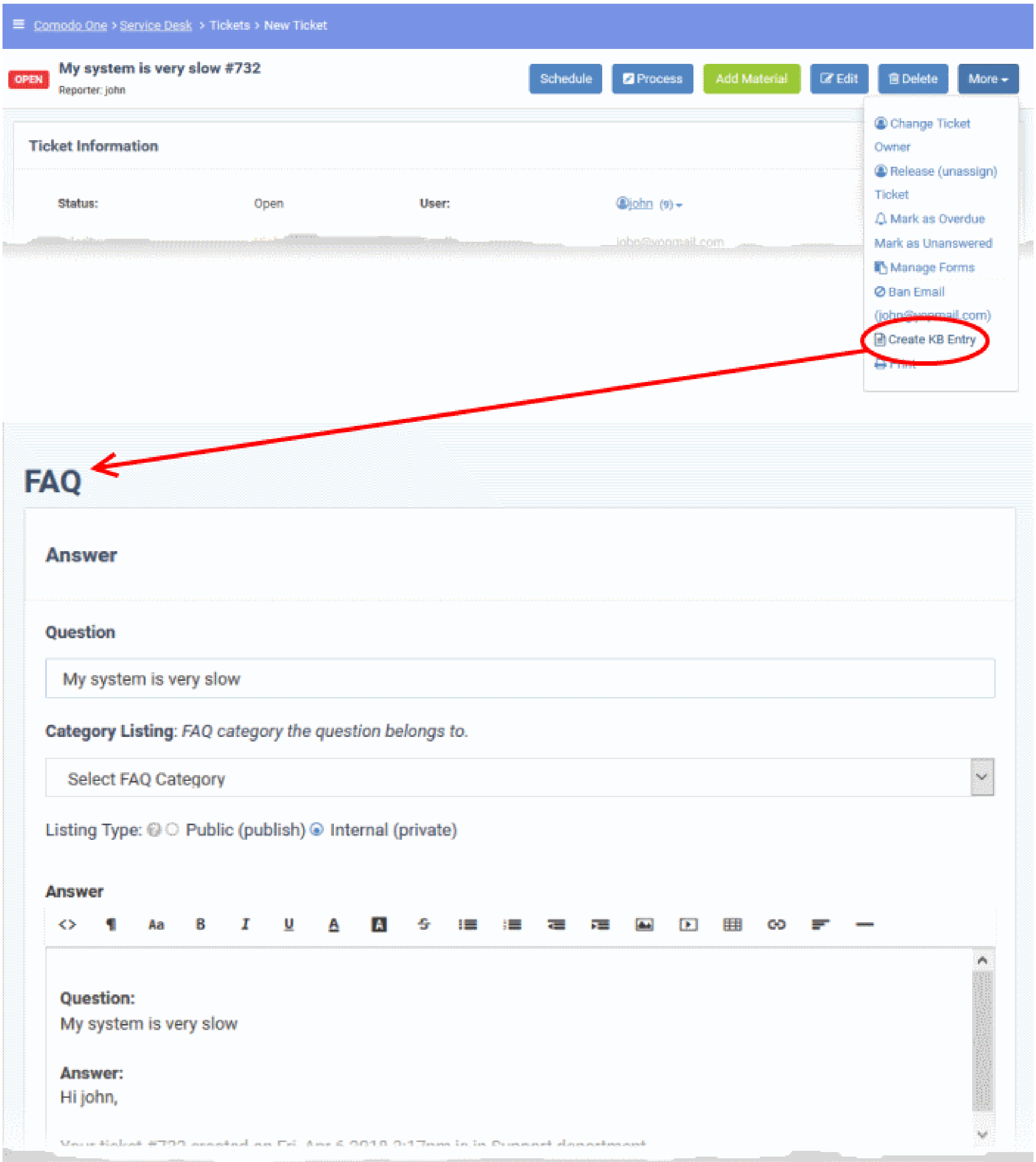
- The 'Knowledgebase' is a repository of support articles, FAQs and useful information intended to assist end-users with answers to common issues.
- It allows users to identify and solve common issues by themselves without needing to create a support

ticket.

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

To add a knowledgebase article from a ticket

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



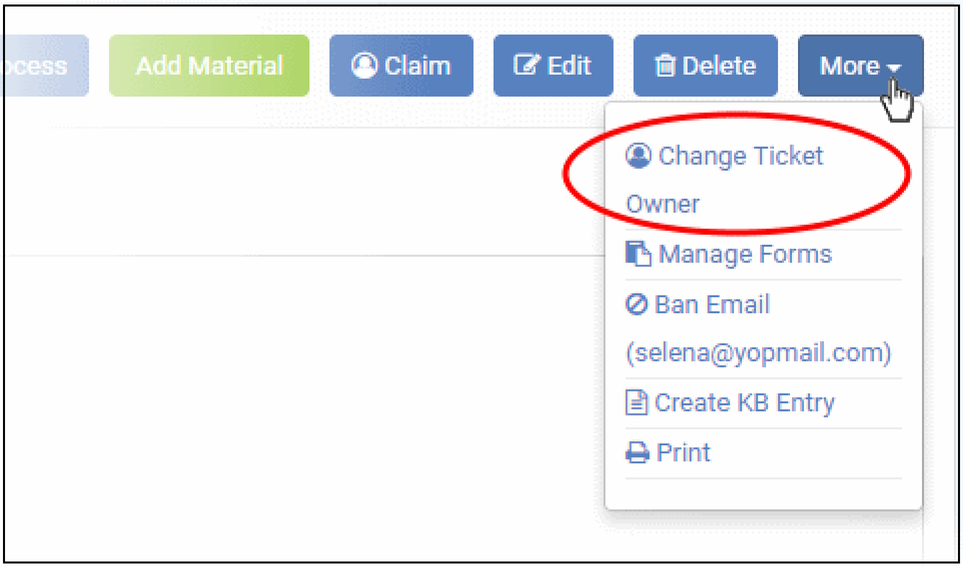
The **FAQ** screen will appear. This screen allows staff to select the category under which the FAQ will be placed. You can also specify articles which are related to the FAQ, and choose to make the FAQ 'Public' or 'Internal'. See **FAQ** for more details.

Change the ticket owner

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

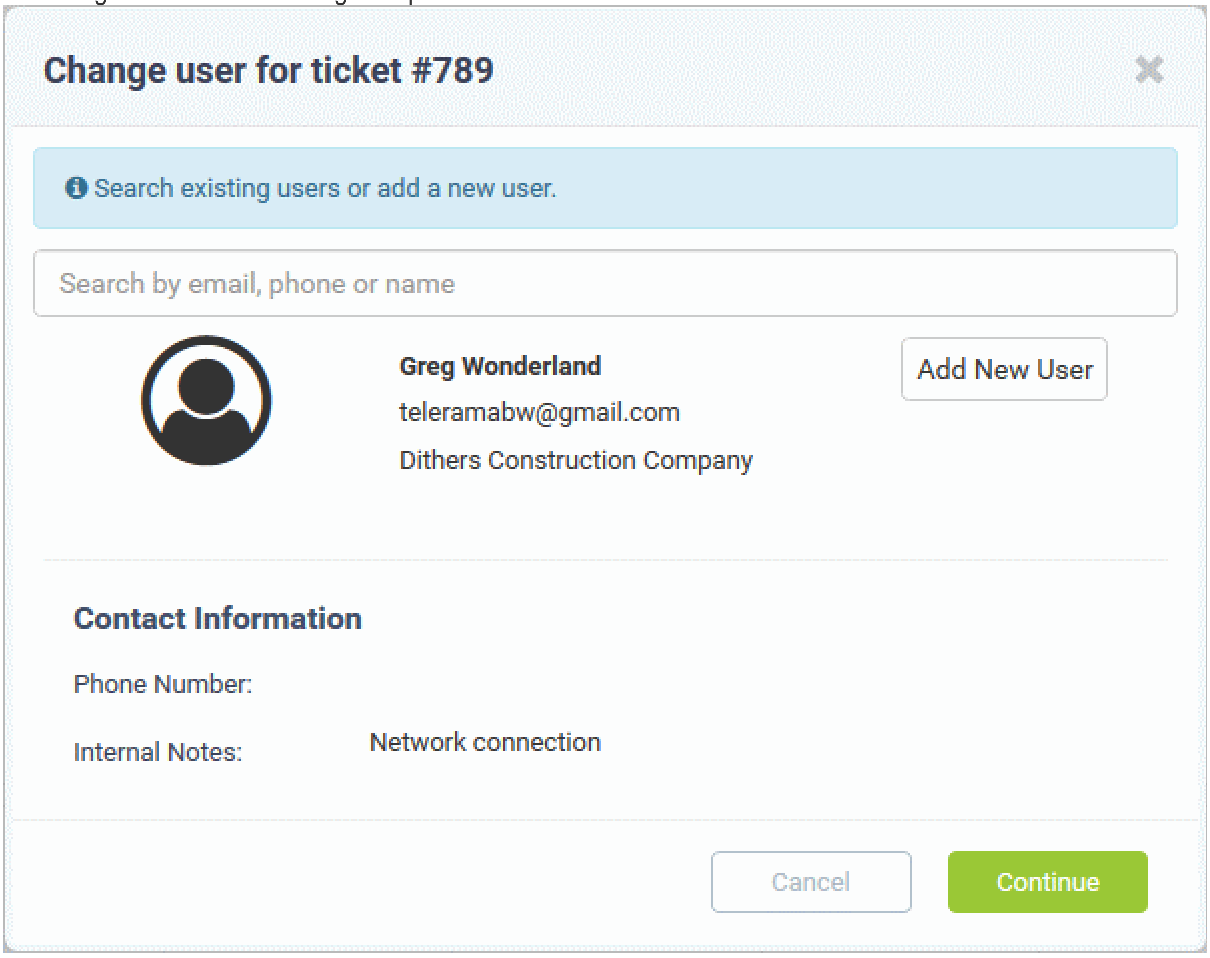
To change the ticket owner

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



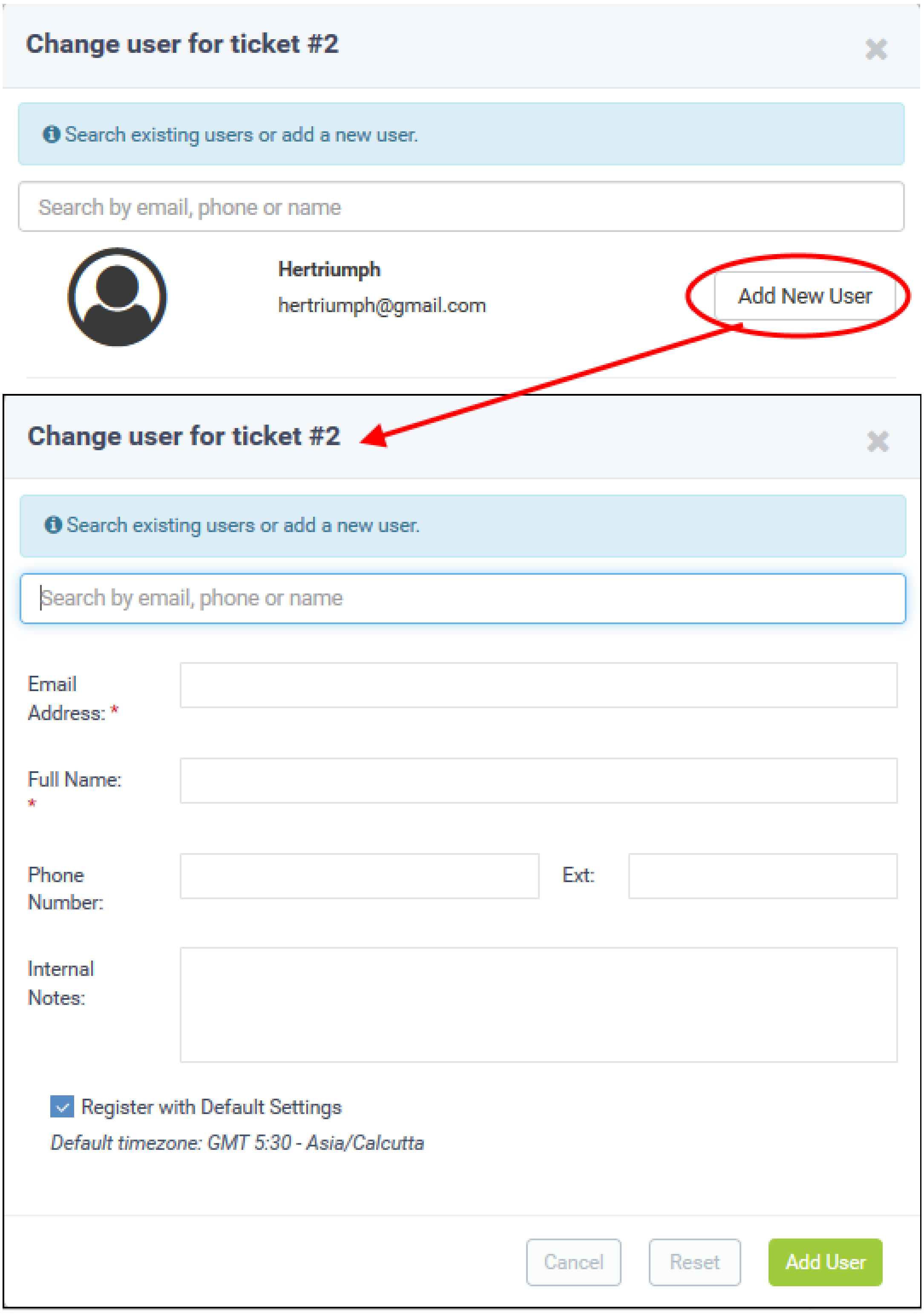
Tip: Alternatively, click 'Edit' then 'Change' beside the user name from the 'Update Ticket' screen.

The 'Change user for ticket' dialog will open:



You can change the user in two ways:

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



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

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

- You can associate new users with 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.

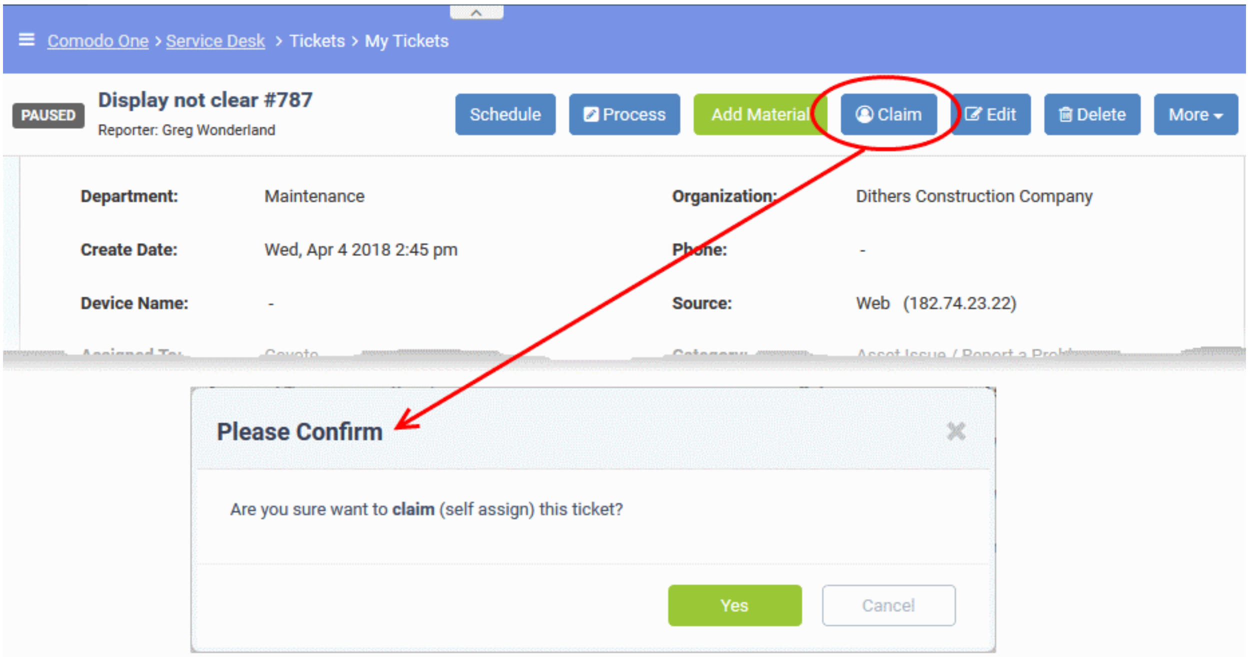
Claim / Self-assign a ticket

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 in **Ticket Settings**.
- Staff can manually assign tickets to themselves by clicking the 'Claim' button in the ticket details screen.

To claim a ticket

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



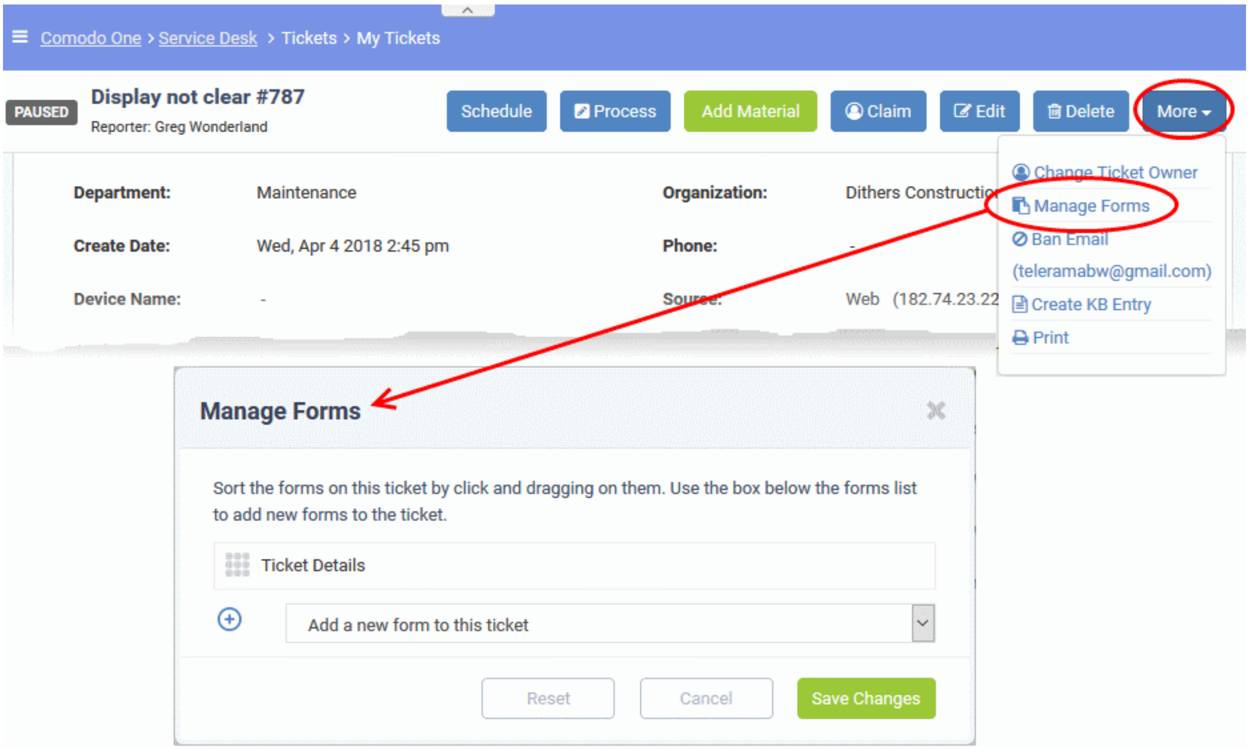
- Click 'Yes' in the confirmation screen to claim the ticket.

Manage forms for a ticket

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

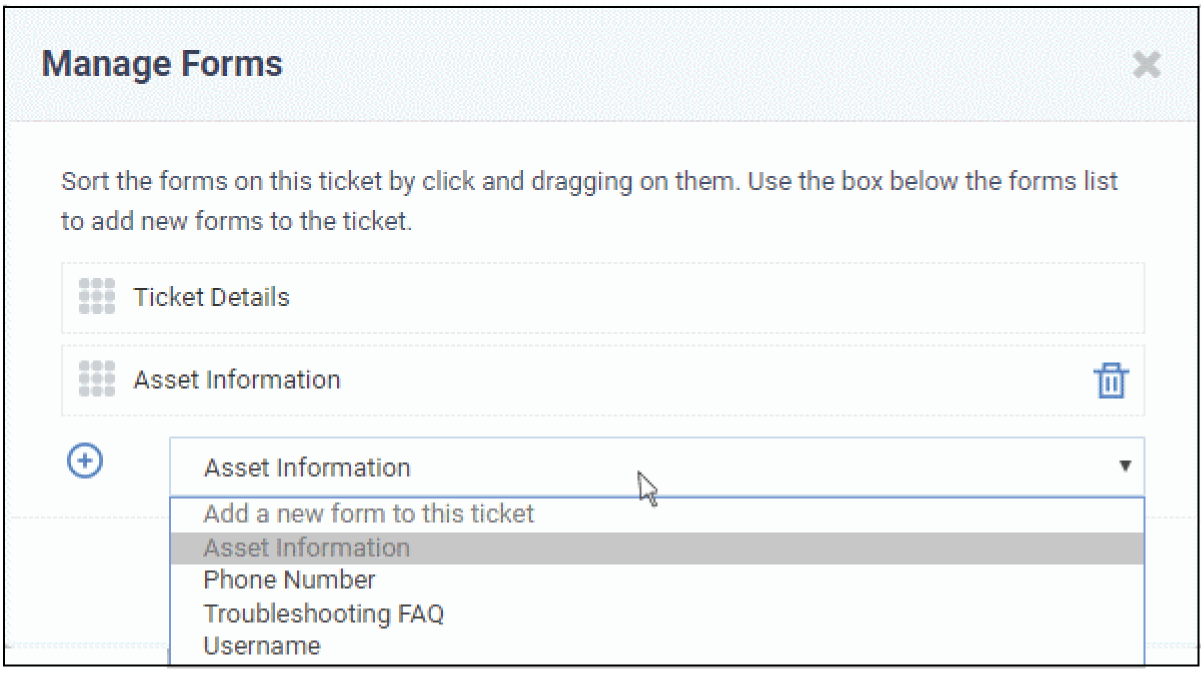
To manage the forms for a ticket

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



The 'Manage Forms' screen will open:

- Select the form you want to add from the drop-down.
- Forms can be added by admins in 'Admin Panel' > 'Manage' > 'Forms' > 'Add Custom Form.' See **Forms** 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.

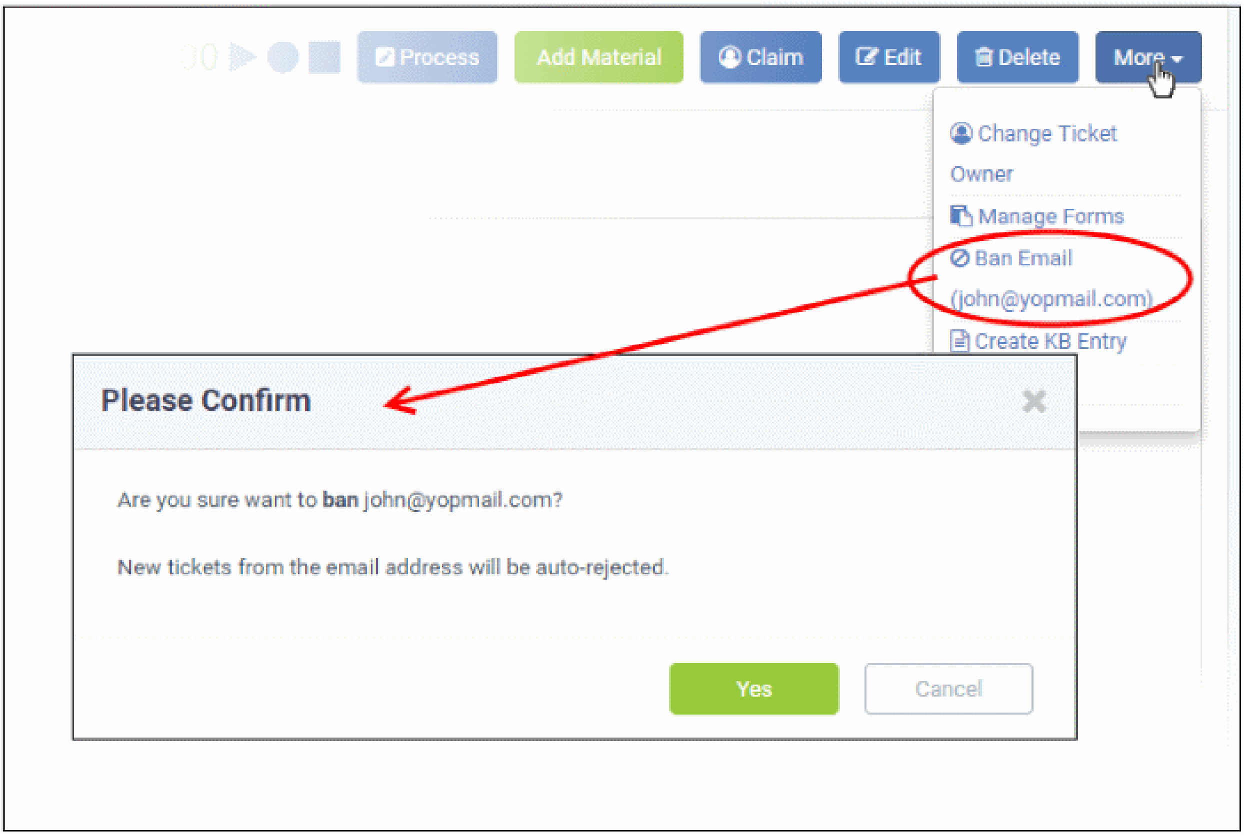
- To remove a form from a ticket, click the 'Manage Form' button then click the trash can icon beside the form.
- Click the 'Save Changes' button at the bottom.

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.

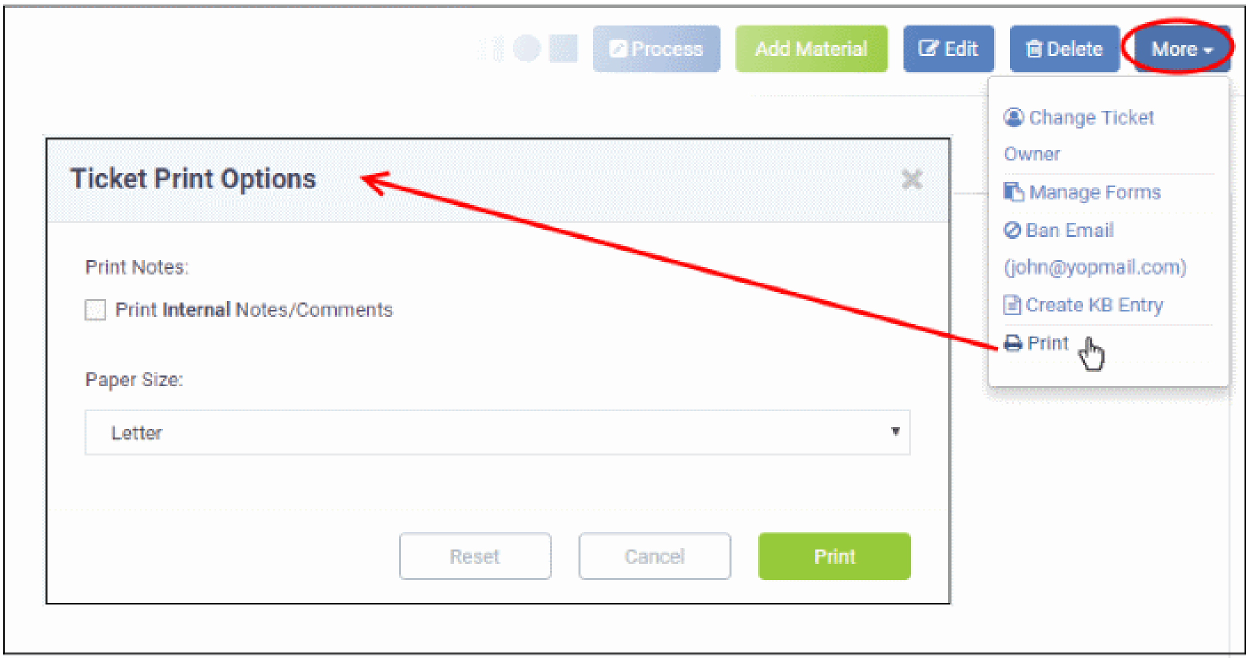
Print a Ticket

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

To print a ticket

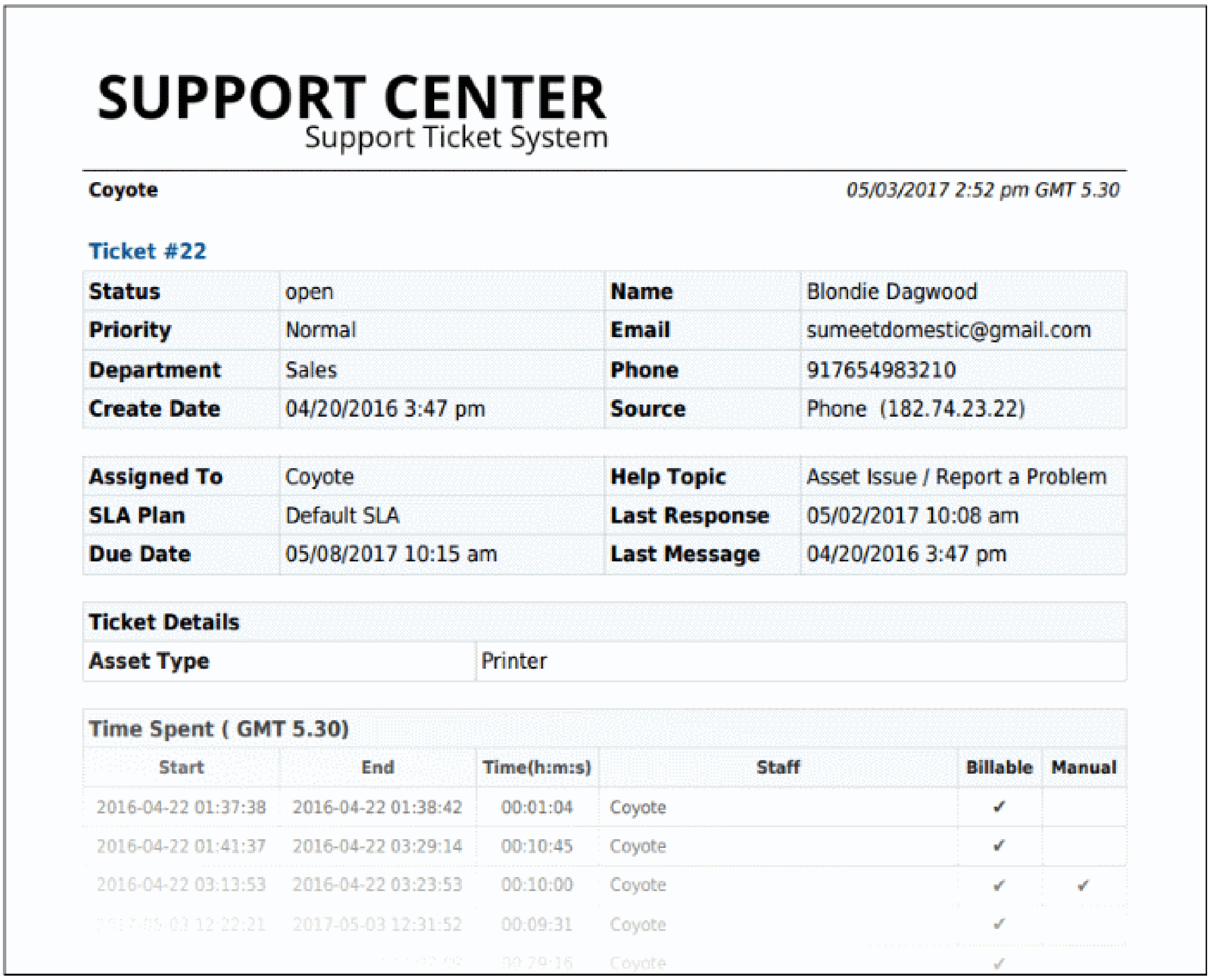
- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click 'More' then 'Print' from the options.

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	✓	
[illegible]	[illegible]	00:29:16	Coyote	✓	

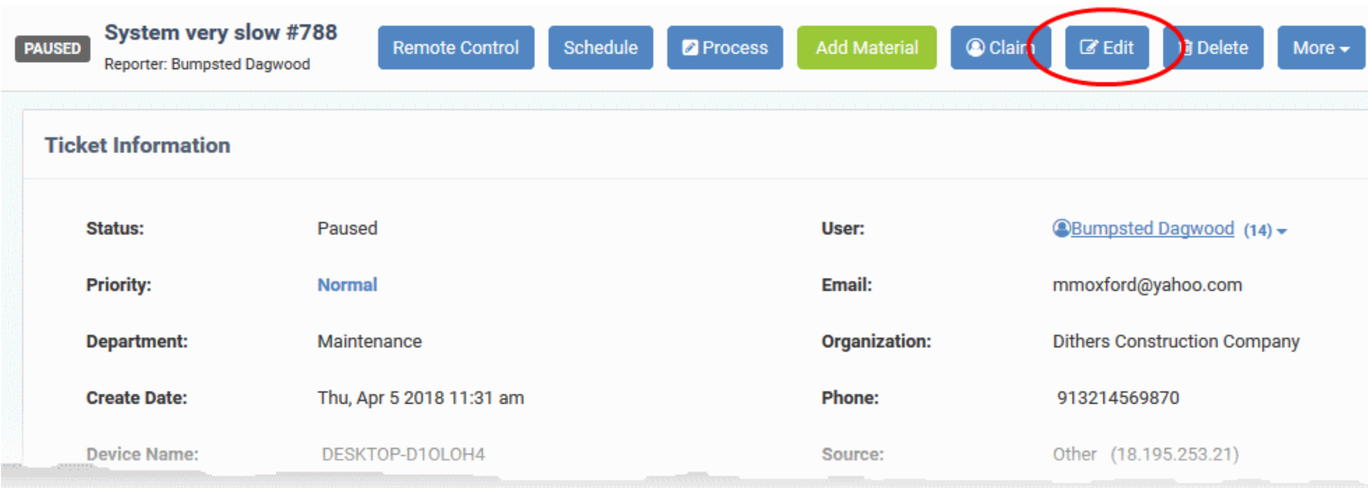
- Save the file for your future reference and/or print the ticket from the pdf file.

Edit a ticket

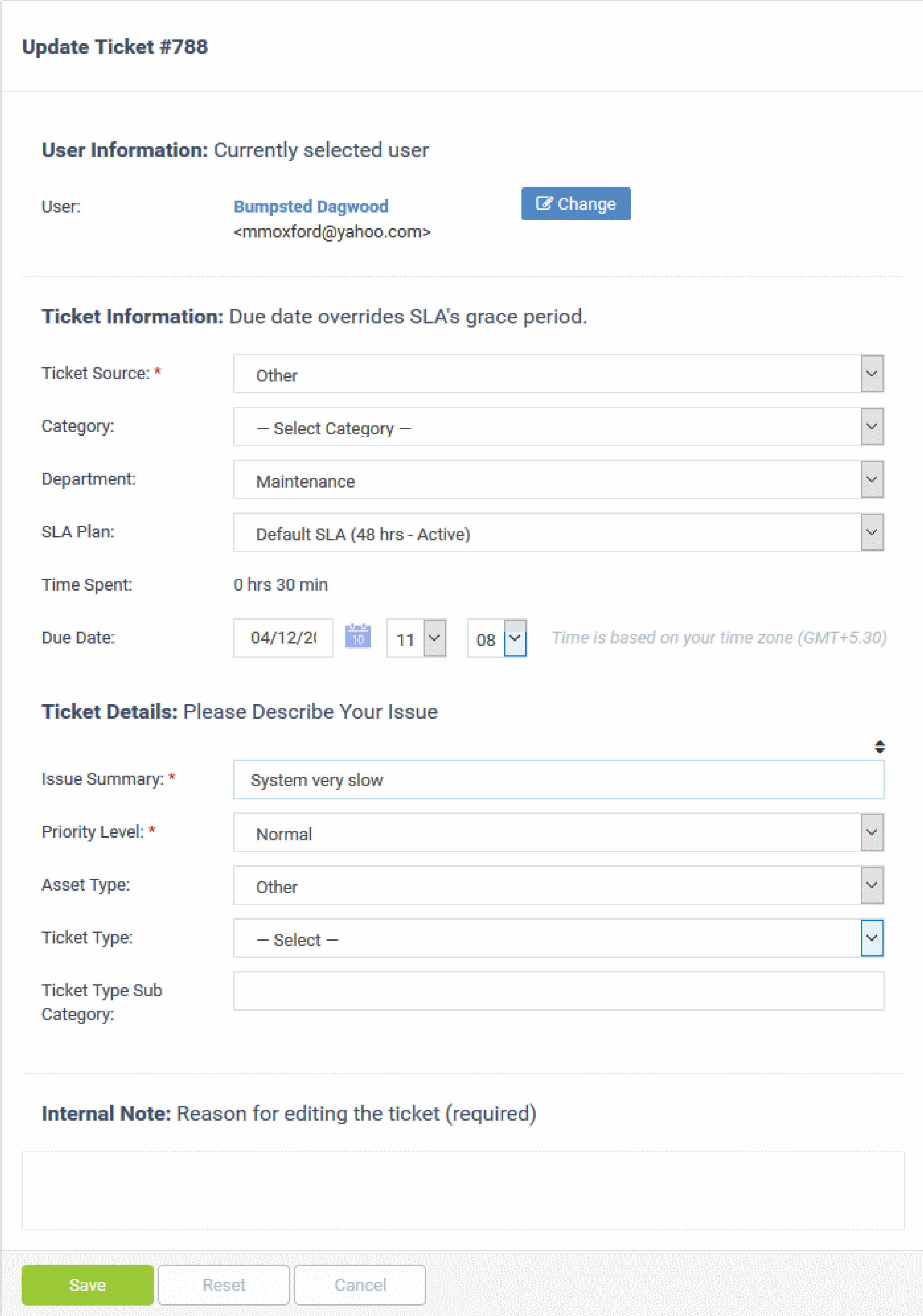
Basic ticket details can be updated at anytime from the 'Ticket Details' interface.

To edit a ticket

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



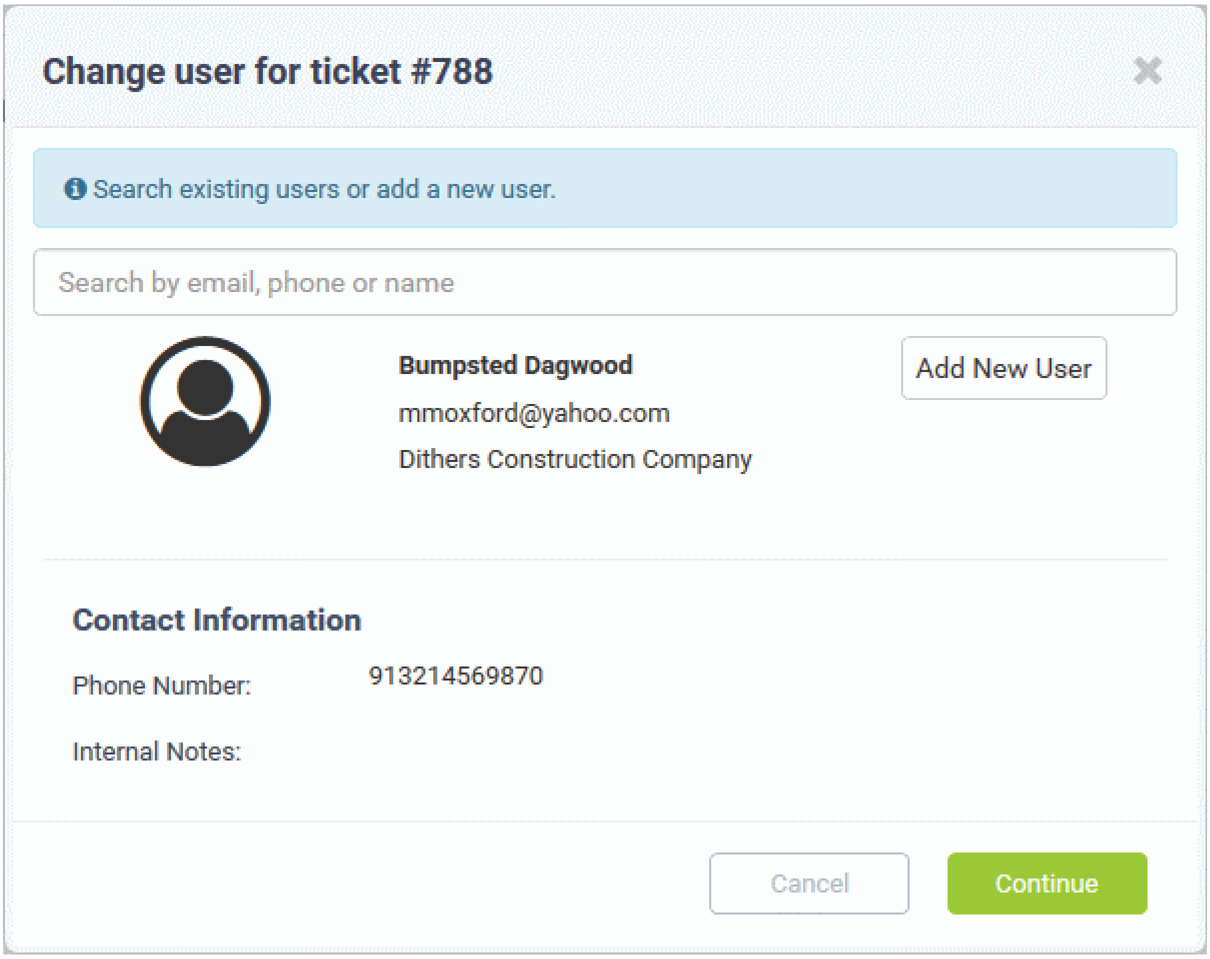
The 'Update Ticket' screen will appear:



User Information

Details about the user who submitted the ticket, or on whose behalf the ticket was submitted. This user is also known as the 'Owner' of the ticket. You change the ticket owner from this area.

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

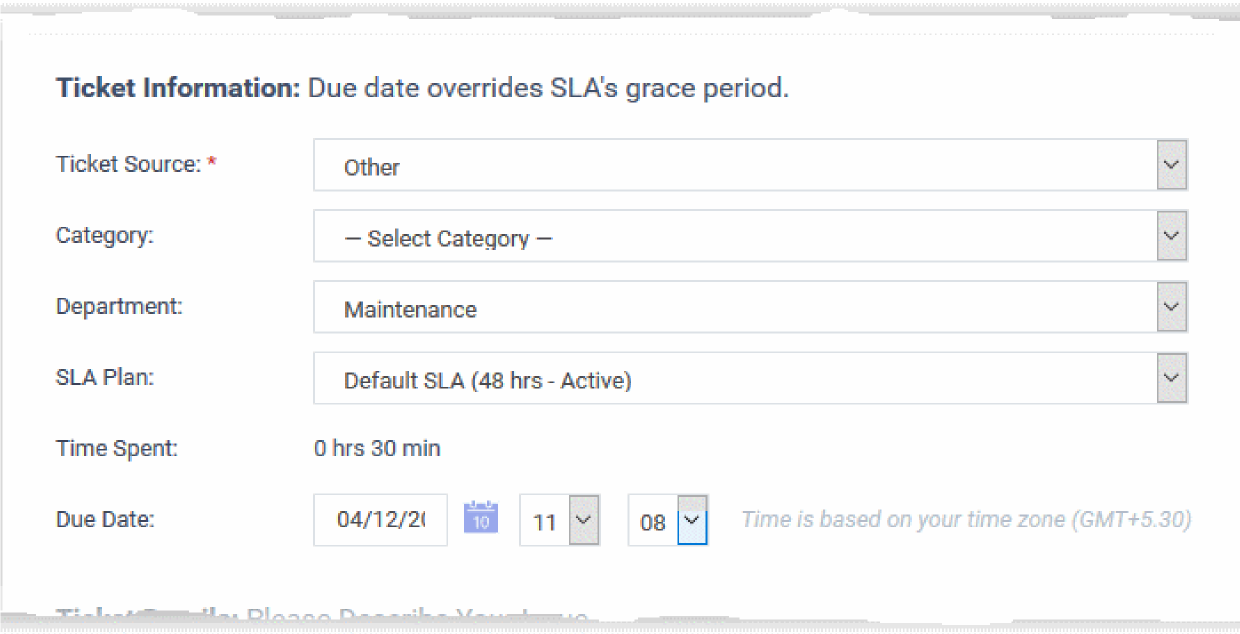


Tip: New users will be added as guest users.

- You can associate new users with 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.

Ticket Information

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



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

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

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

Ticket Details

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

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

  - Change the sub-category, if required.

Internal Note

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

- Click the 'Save' button to update the ticket

Close and Reopen tickets

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

Notes:

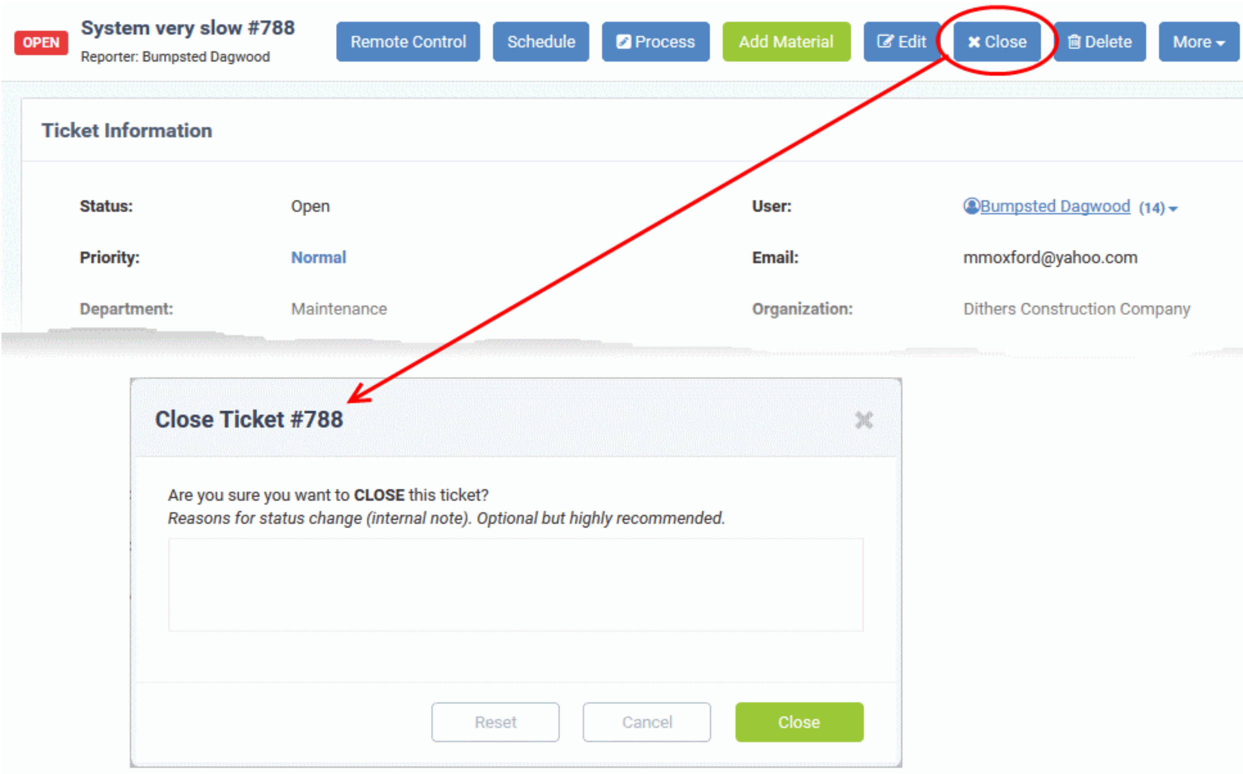
- You can close a ticket only if it has an 'Open' status. 'Paused' tickets cannot be closed. If required, you can resume the ticket and close it. See **Pause and resume a ticket** if you need help with this.
- Staff members can only close tickets that are assigned to them
- Admins can close tickets assigned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

You can close a ticket in two ways:

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

To manually close a ticket

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

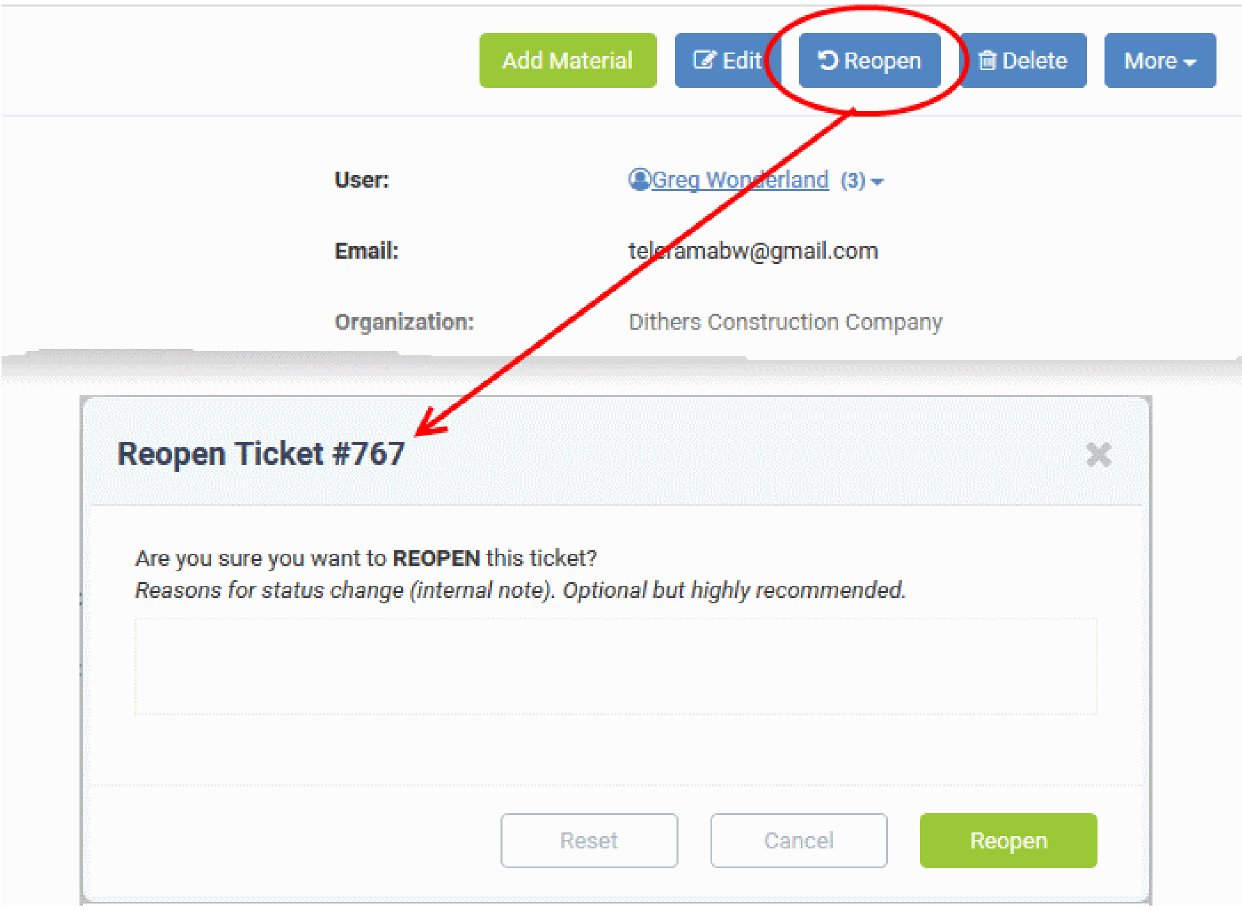


- Enter the reason and click 'Close'

To re-open a closed ticket

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

The 'Reopen Ticket' screen will be displayed:



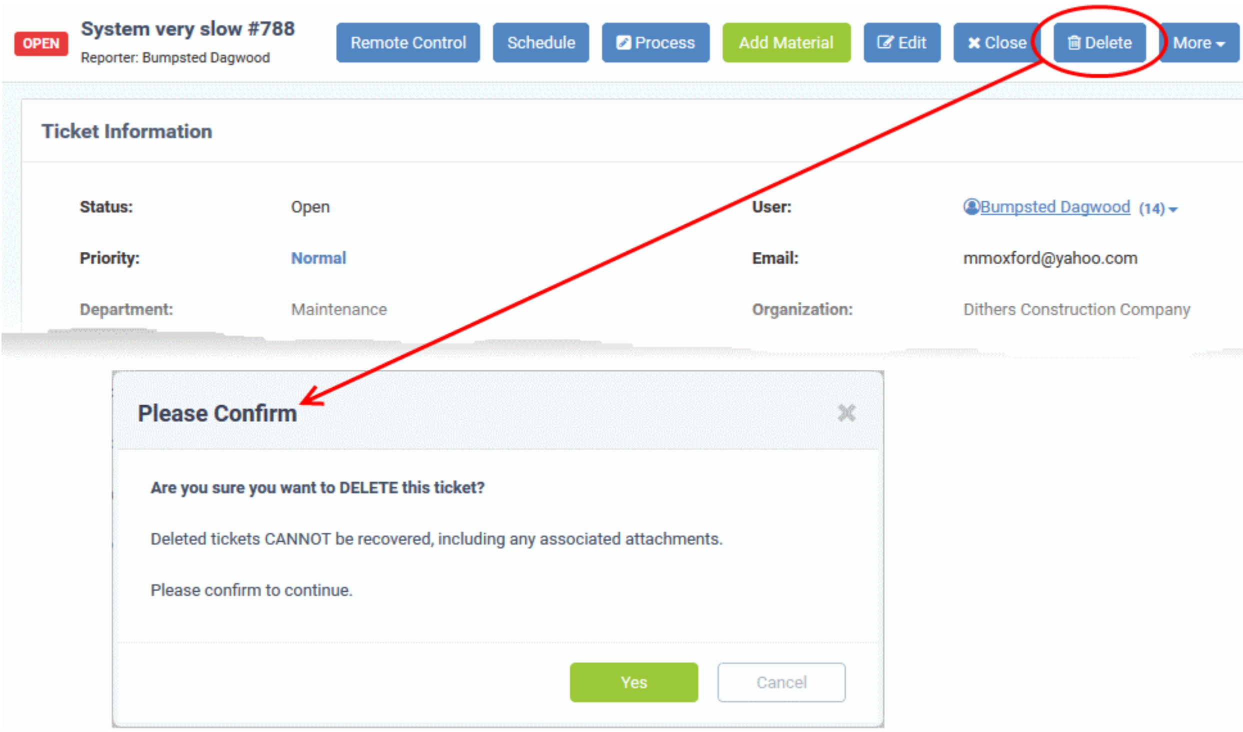
- Enter a reason for reopening then click the 'Reopen' button.

Staff members can now resume work on the ticket.

Remove a Ticket

You can delete a ticket as follows:

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



- Click 'Yes' in the confirmation screen.

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

Pause and resume a Ticket

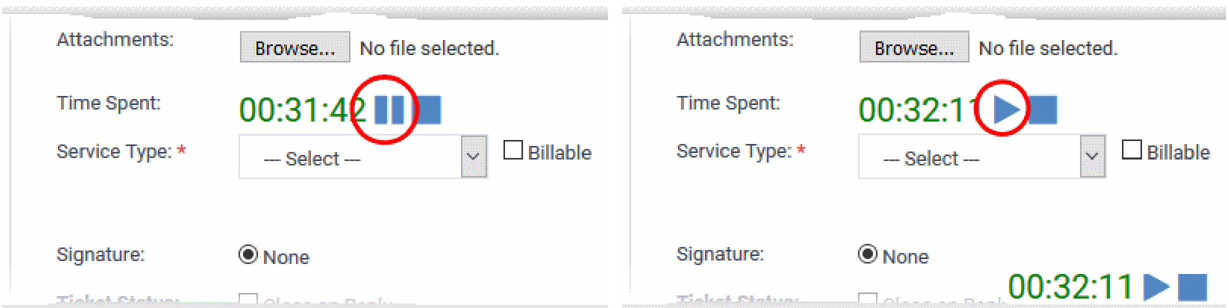
Tickets can be paused and resumed by staff. Paused tickets can only be resumed by the same staff member or by an administrator.

To pause/resume a ticket

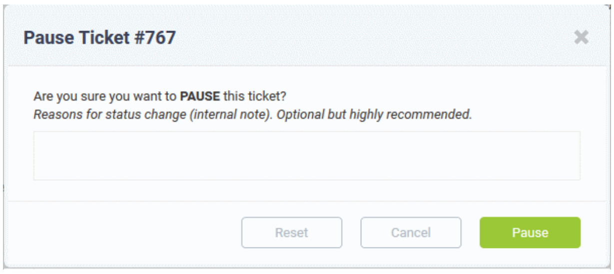
- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Click the 'Ticket Actions' stripe to open the 'Ticket Options' pane, if not already opened.

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

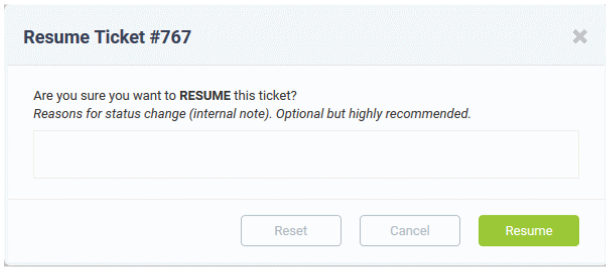
- Click the 'Pause' or 'Resume' button depending on the ticket status.



The respective internal note screen will be displayed.



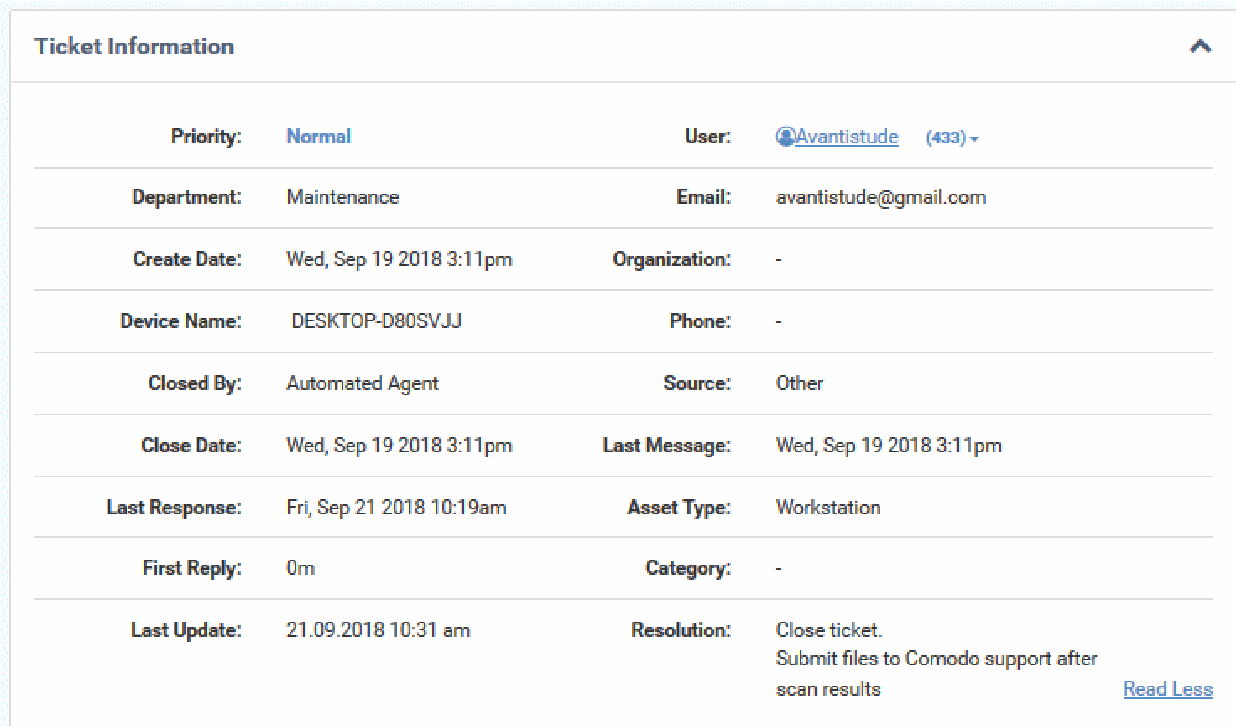
- Click the Pause button after entering the reason.



- Click the Resume button after entering the reason.

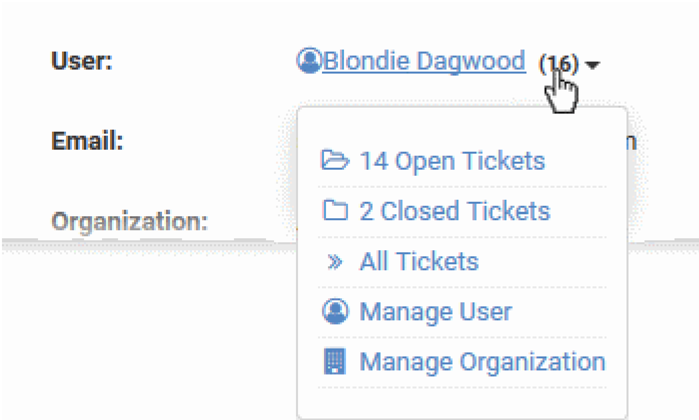
Ticket Information

- 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. See '**Forms**' for more details. The screenshot below shows a ticket with default fields:



- **Priority**: The criticality of the ticket. Priority can be inherited from the ticket category or department, or set manually during ticket creation. Staff can also change the priority of the ticket while it is in progress.
  - See **Editing a ticket** for more details.
  - See **Appendix 2 - Ticket Priorities** for general advice on assigning priorities
- **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 **Editing 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 '**Managing Users**' and '**Managing Organizations**' for more details.

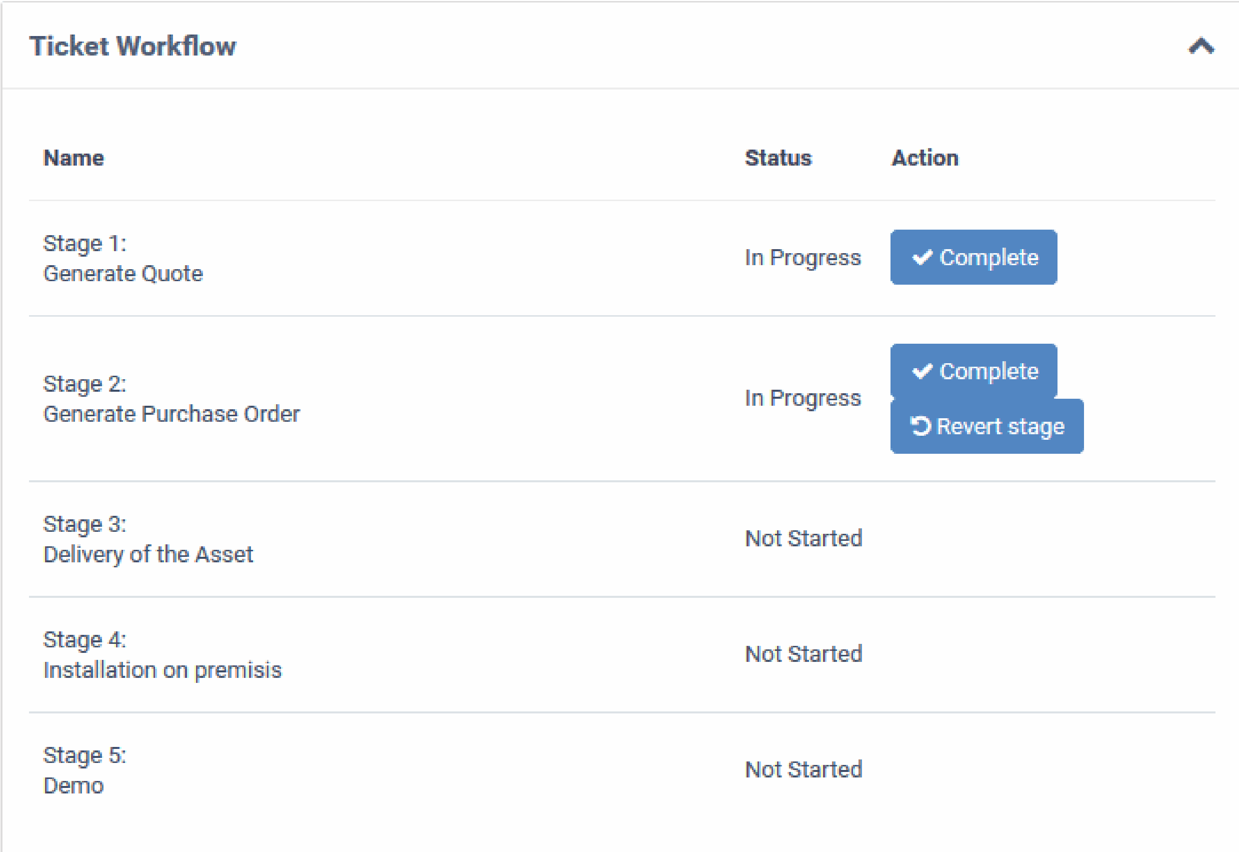


- **Email**: The email address of the user who created the ticket, or on whose behalf the ticket was created by an agent. Tickets which were automatically submitted by an endpoint-agent will have the address 'Ticket User'.
- **Organization**: The organization to which the user belongs.
- **Phone**: The 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 **Editing 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 **Editing 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.

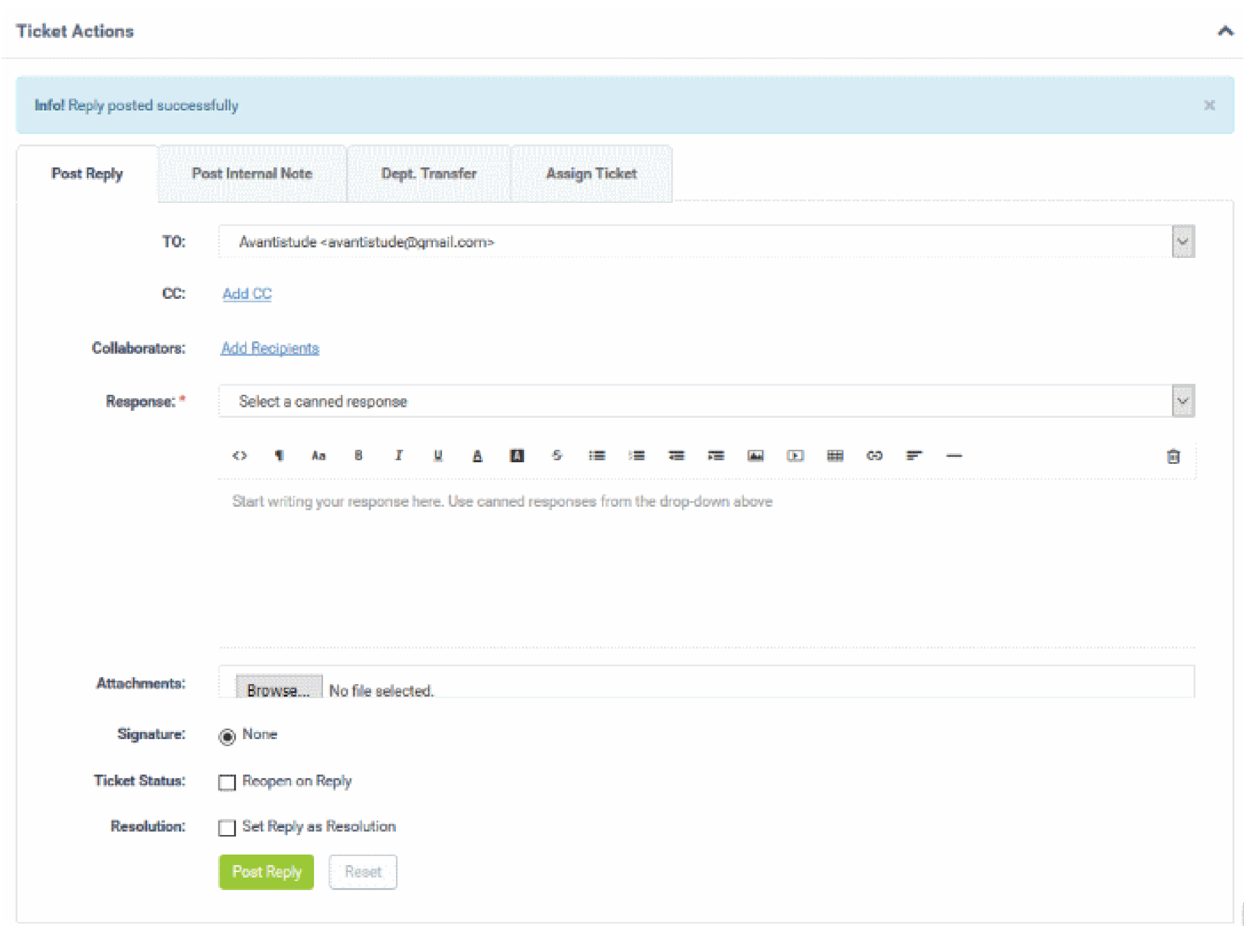


- Specific departments and staff members can be assigned responsibility of each stage.
- Once a staff member has completed their stage, the ticket will be assigned to the next department/staff member.
- This process will continue till the final stage is completed and closed.
- A ticket can be moved to the previous stage by clicking 'Revert stage'.

Actions

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

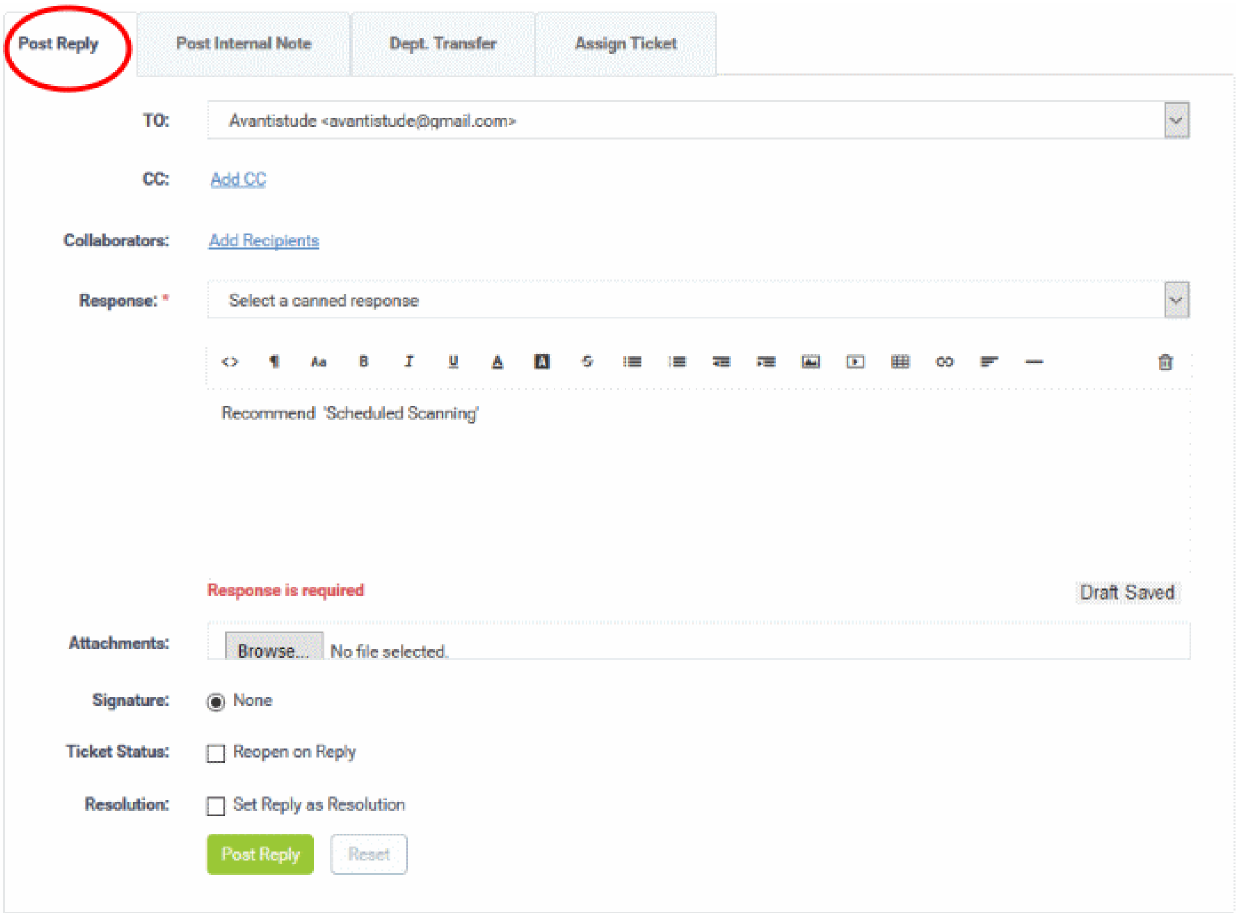
The 'Ticket Actions' pane allows staff to post replies, claim a ticket, assign/re-assign a ticket, add materials, pause/resume a ticket and more.



- **Post a reply**
- **Post an internal note**
- **Change the department**
- **Reassign the ticket**
- **Initiate Quote generation for billable items**

To post a reply for the ticket

- Click the 'Post Reply' tab



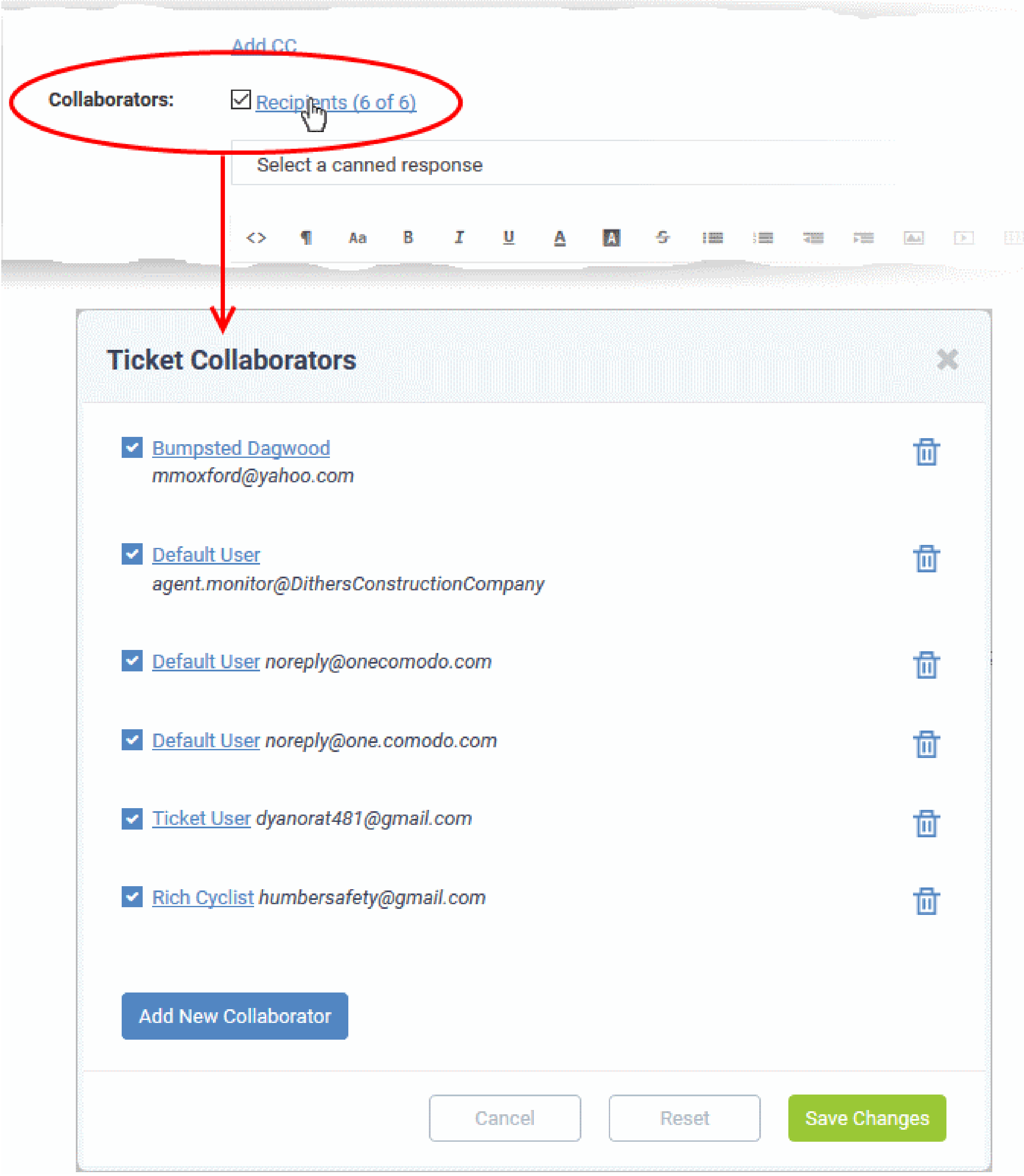
- **From**: The email address used to send the reply to the user. The 'Organizations' interface allows you to set default 'From' addresses for each organization. See **Manage Organization Details** in **Manage Organizations** for more details. If required, you can choose a different email address from 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:

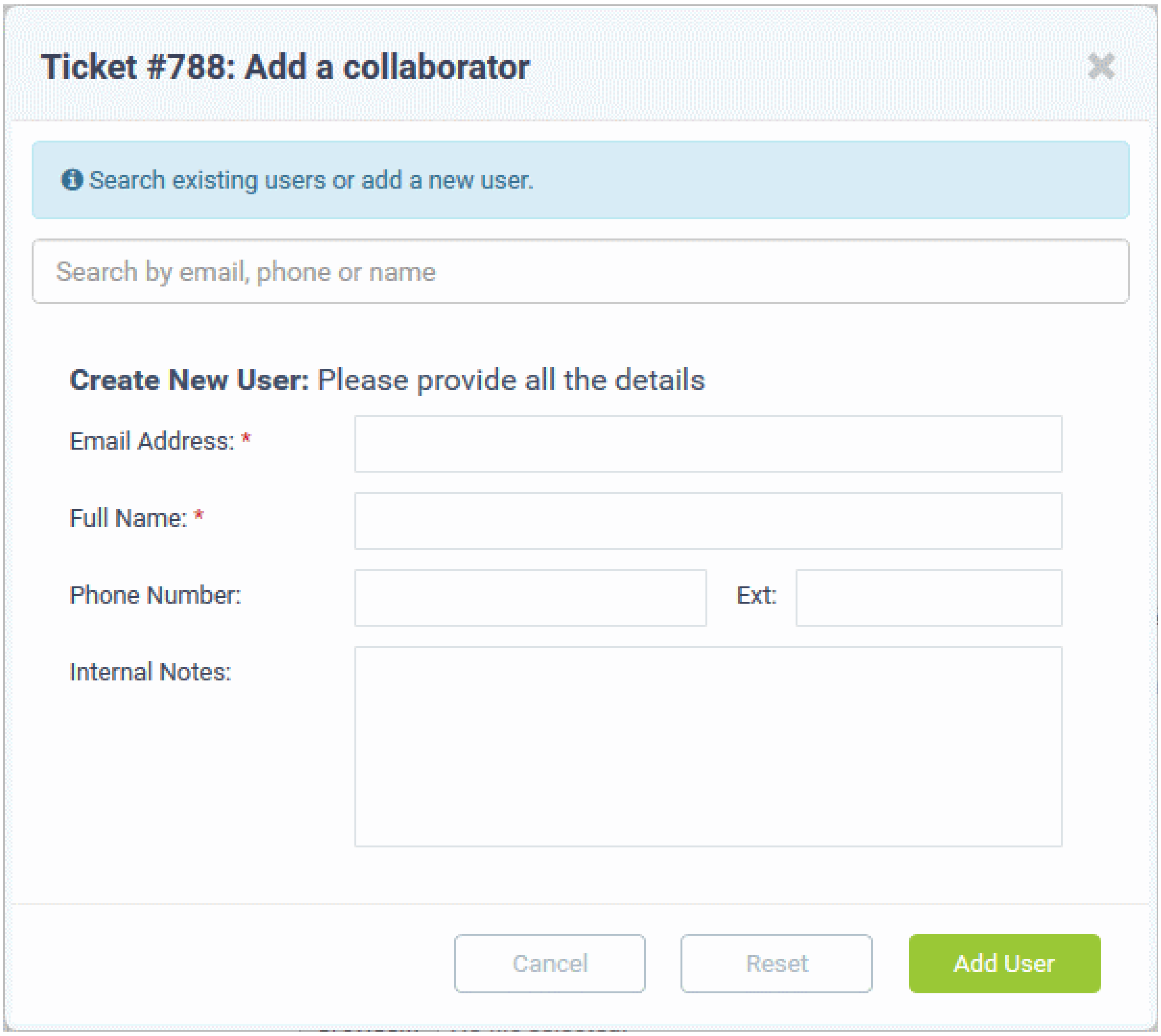
- Click 'Users' on the left then 'Organizations'
- Click the name of the organization to open its details interface
- Click the 'Name' of the organization in the upper panel
- Click the 'Settings' tab and scroll to the 'Automated Collaboration' section

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

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



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



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

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

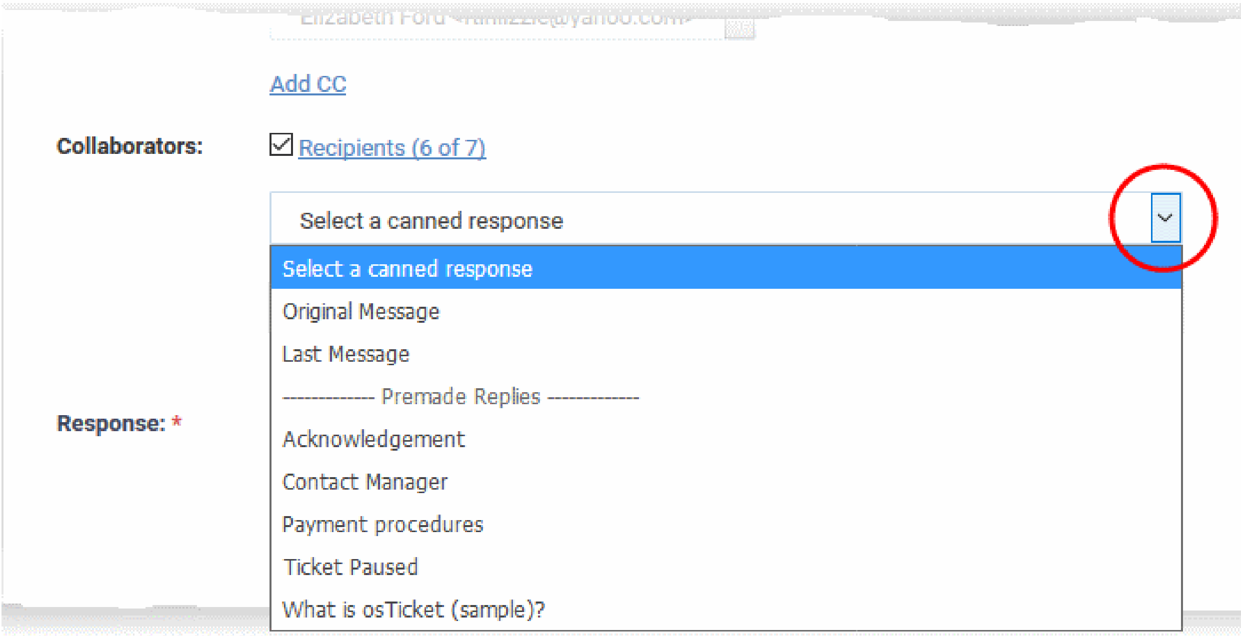
Tip: If you are adding a new user, he/she will be added as a guest user. You can assign the user to an organization in the 'User Directory' interface:

- 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 **Managing Users** for more details.

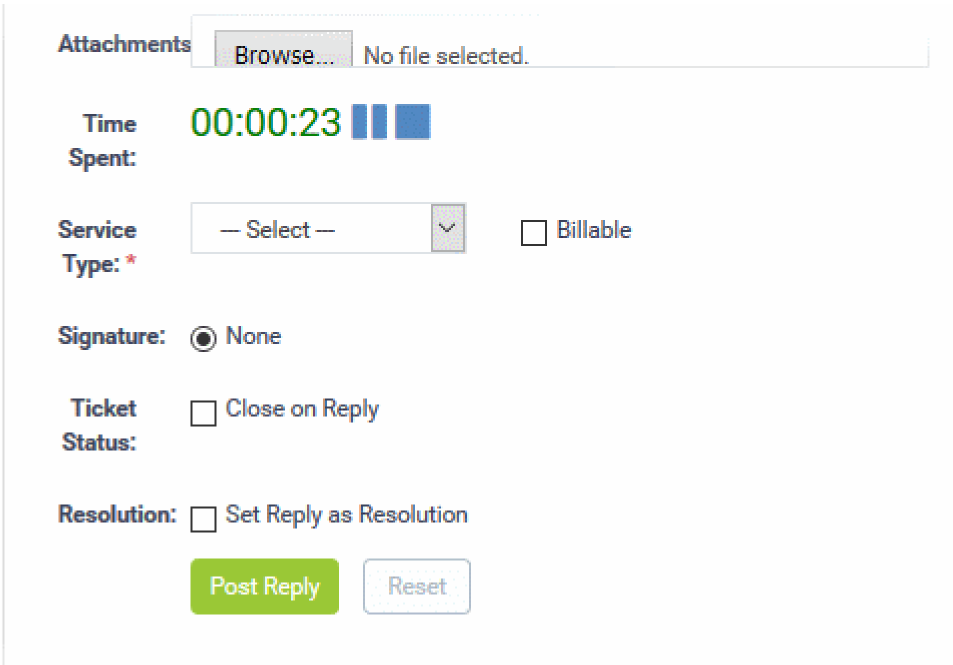
- Repeat the process to add more collaborators
- Click 'Save Changes' in the 'Ticket Collaborators' dialog for your changes to take effect.

- **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

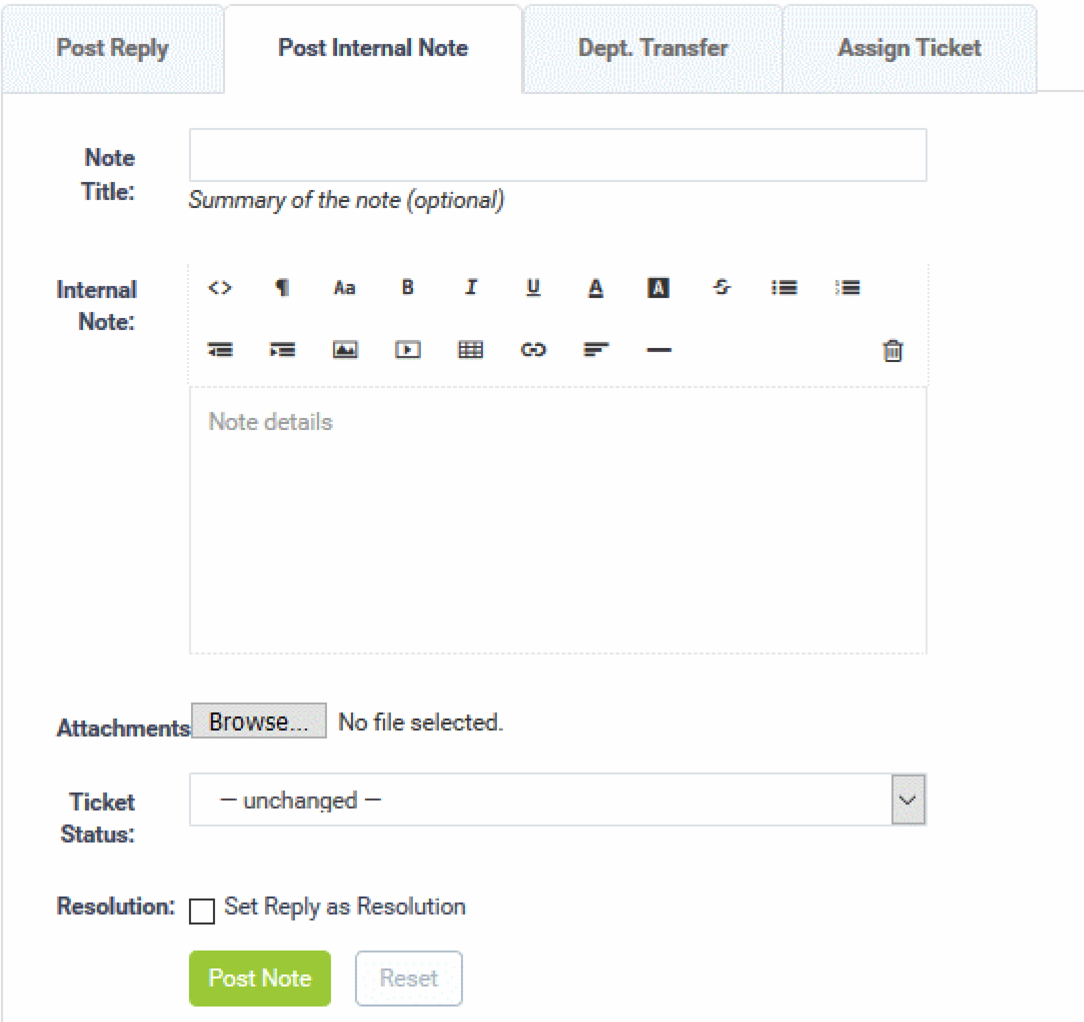


- To add the time spent on the current session as billable work time, select the 'Billable' checkbox

- **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 respectively. Refer to '**Staff Members**' and '**Department**' for more details about adding signatures.
- **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 the set the reply as a resolution for the ticket

To post an internal note

- Click the 'Post Internal Note' tab



- **Note Title:** Enter a short summary for the note.
- **Note Details**: Enter any comments, notes, reminder or reason for pausing the ticket in the in the text editor
- **Attachments:** Click the 'Choose File' button to add attachments to the note. To remove the attachment, click on the file and select 'OK' at the confirmation screen.
- **Time Spent**: The timer shows the time spent on the current service session

- To add the time spent on the current session as billable work time, select the 'Billable' checkbox

- **Service Type**: Choose the kind of service offered during the current service session from the drop-down. The charges for the current session will be calculated based on the time spent, asset type mentioned in the ticket and the service contract associated with the customer company.
- **Ticket Status**: To change the status of the ticket, select from the options. The options change depending on the current status of the ticket. For example, for an open ticket, the options are 'Unchanged', 'Close the ticket' and 'Mark As Unanswered'.
- **Resolution**: The resolution field of a ticket indicates its current place in your workflow. It is a communication of ticket progress rather than a definitive ticket status like 'Closed', 'Open' etc. This option means your note will also become the ticket's current resolution status.
  - Example. A resolution status of 'Resolved' means a fix has been implemented and is ready for testing. A ticket status of 'Closed' means the resolution has been verified and no further work is required on the ticket.

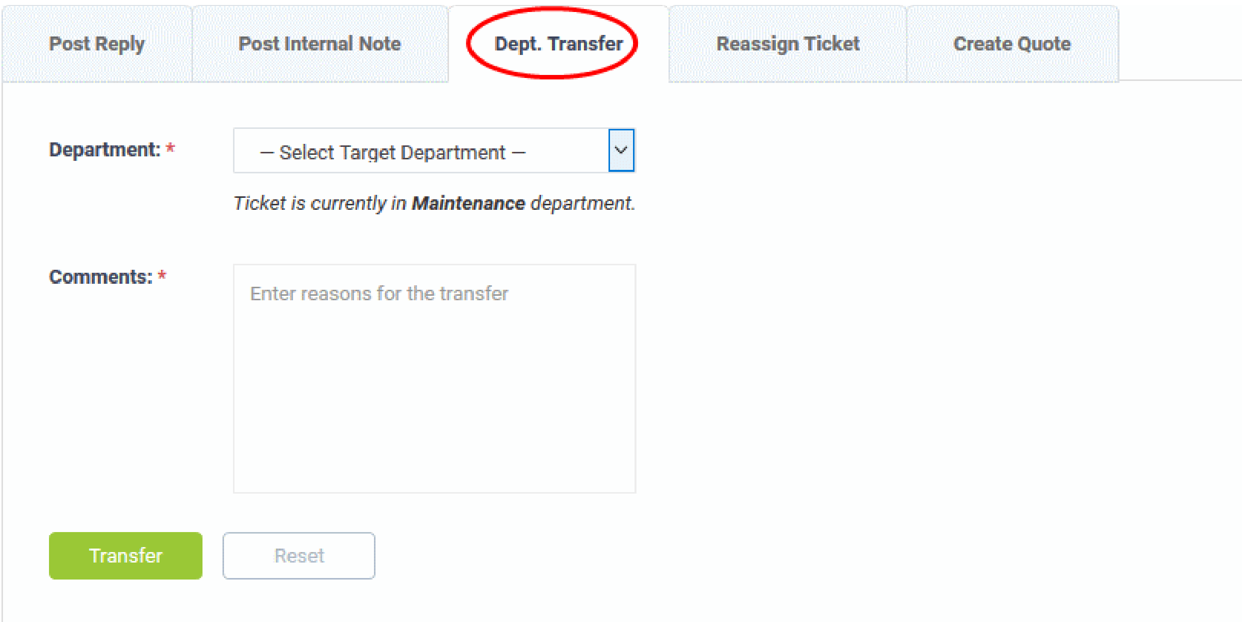
Click the 'Post Note' button. The note will be saved, the work time will be added to the ticket and the status of the ticket will be changed as chosen from the 'Ticket Status' drop-down.

Change the department

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

To change the department for a ticket

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



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

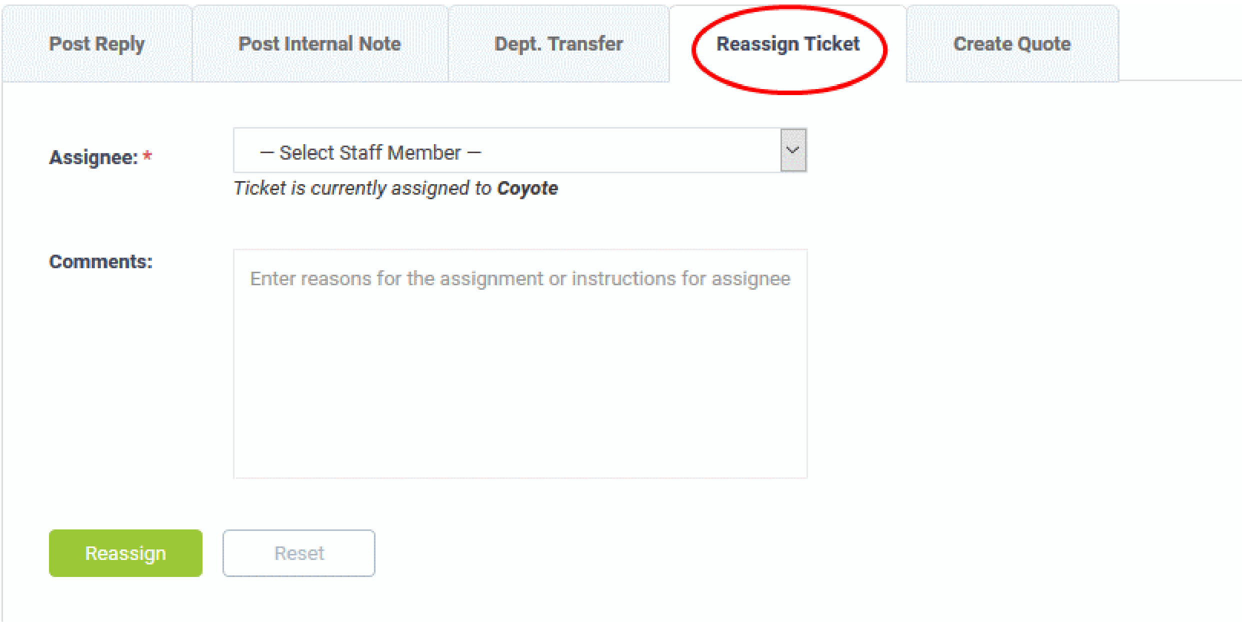
Assign/Reassign a ticket

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

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

To assign/reassign a ticket

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



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

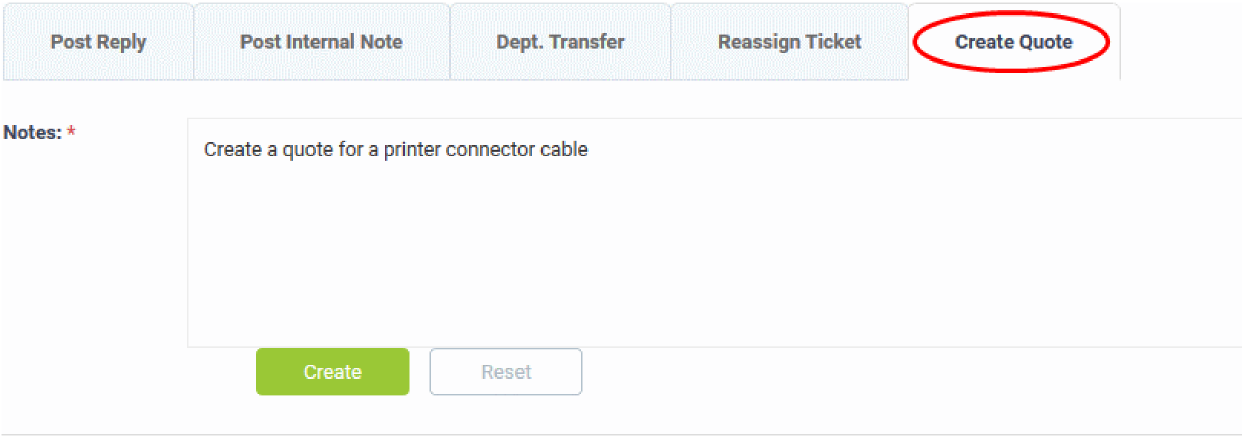
Initiate Quotes for Products/Services

- 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:
  - You must enable quotes in a department to use this feature. Go to 'Admin panel' > 'Staff' > '**Departments**' > click a department to open it's details screen > enable the 'Quote' feature.
  - The ticket should be assigned to the logged in staff member.

To initiate quotes from Service Desk tickets

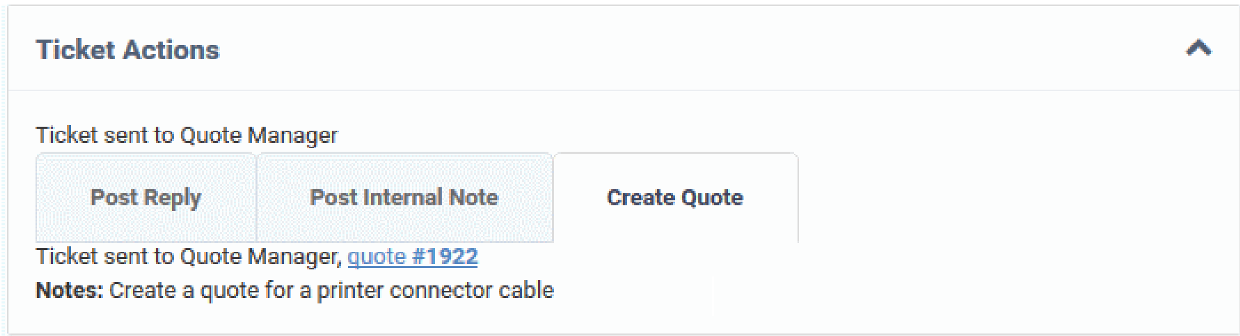
- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Ensure that the ticket department is enabled to generate quote and the ticket is assigned to you. If not, click 'Claim'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

- Click the 'Create Quote' tab

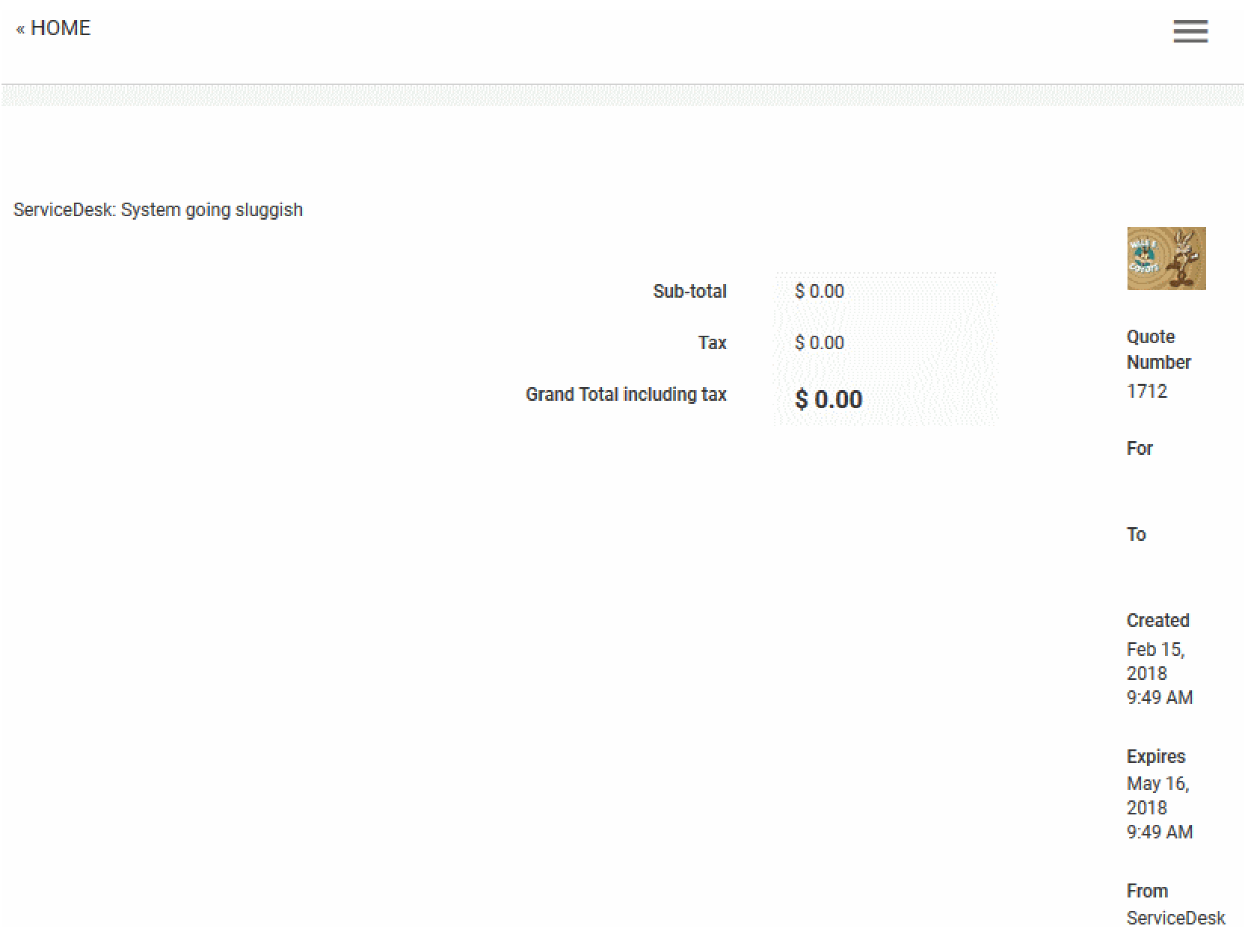


- Enter a message in the 'Notes' field for the staff member attending the Quote Manager console.
- Click 'Create'

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



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

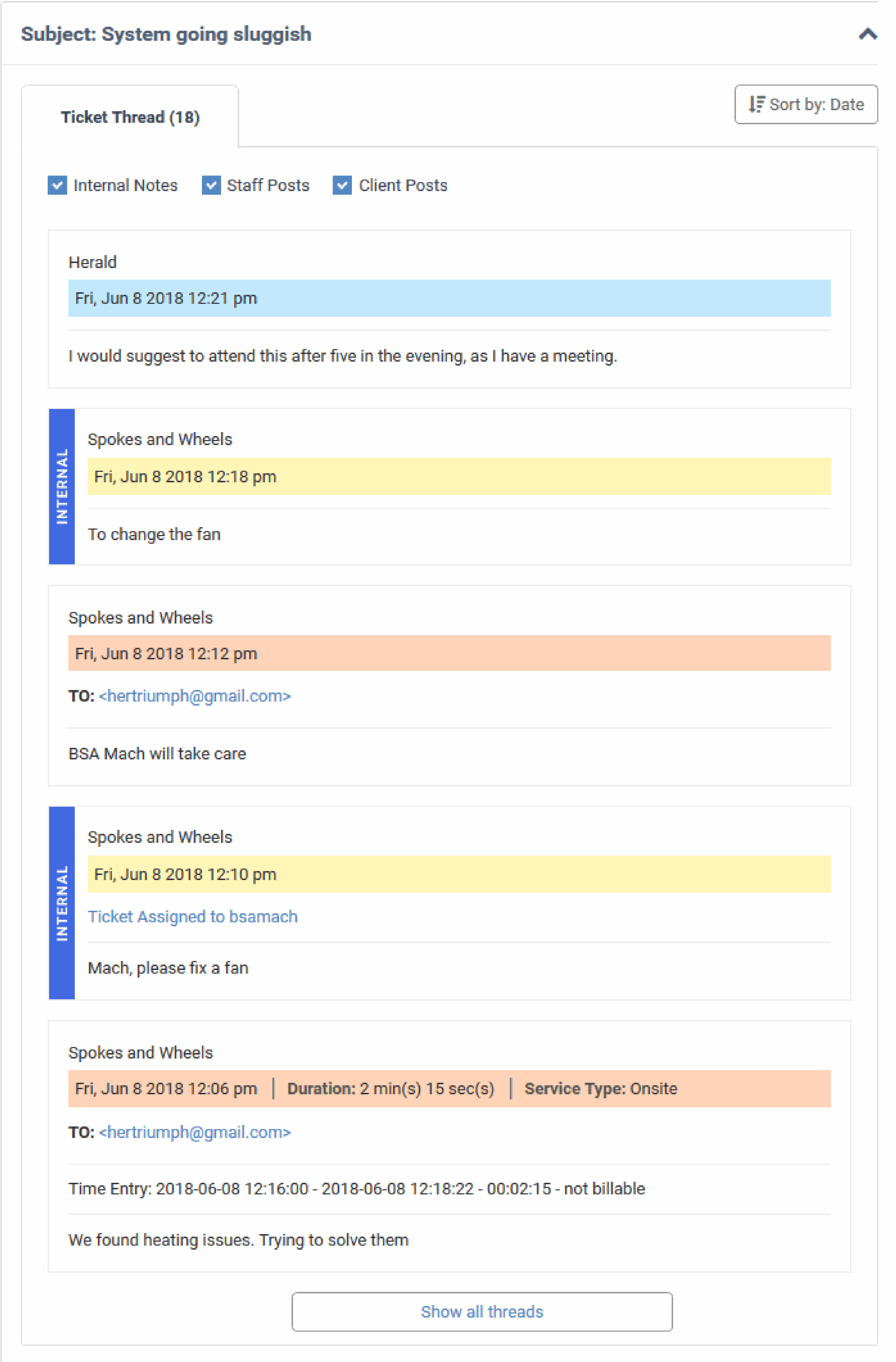


History

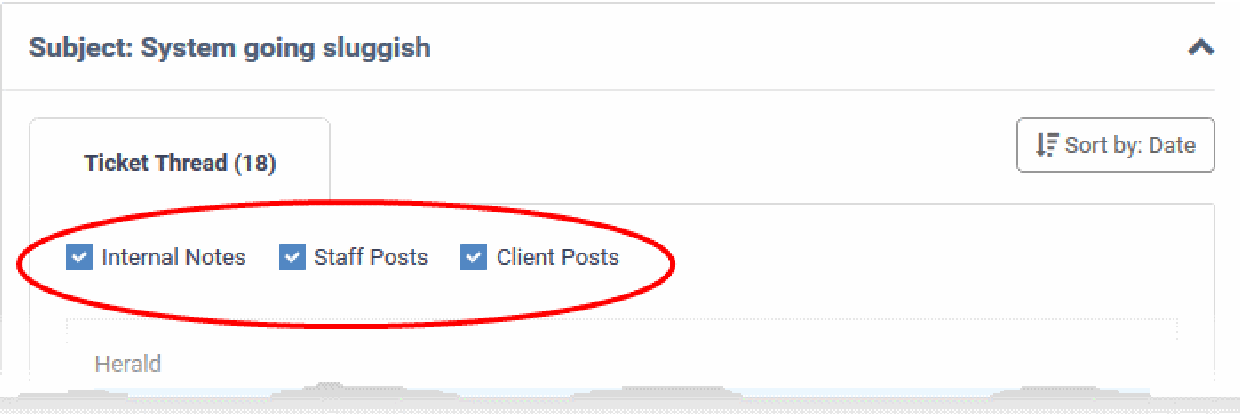
The 'Ticket Thread' pane contains a log of all actions taken on the ticket. Actions can be messages from the user, replies from staff, reassignments, addition of materials, status updates and more.

To view the log of actions for a ticket

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


Subject: System going sluggish
Ticket Thread (18)
Sort by: Date
Internal Notes
Staff Posts
Client Posts
Herald
Fri, Jun 8 2018 12:21 pm
I would suggest to attend this after five in the evening, as I have a meeting.
INTERNAL
Spokes and Wheels
Fri, Jun 8 2018 12:18 pm
To change the fan
Spokes and Wheels
Fri, Jun 8 2018 12:12 pm
TO: <hertriumph@gmail.com>
BSA Mach will take care
INTERNAL
Spokes and Wheels
Fri, Jun 8 2018 12:10 pm
Ticket Assigned to bsamach
Mach, please fix a fan
Spokes and Wheels
Fri, Jun 8 2018 12:06 pm | Duration: 2 min(s) 15 sec(s) | Service Type: Onsite
TO: <hertriumph@gmail.com>
Time Entry: 2018-06-08 12:16:00 - 2018-06-08 12:18:22 - 00:02:15 - not billable
We found heating issues. Trying to solve them
Show all threads

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



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

Material Details

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

To view the materials added to a ticket

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

Material Details

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

Total Approved Material Cost: $20.00

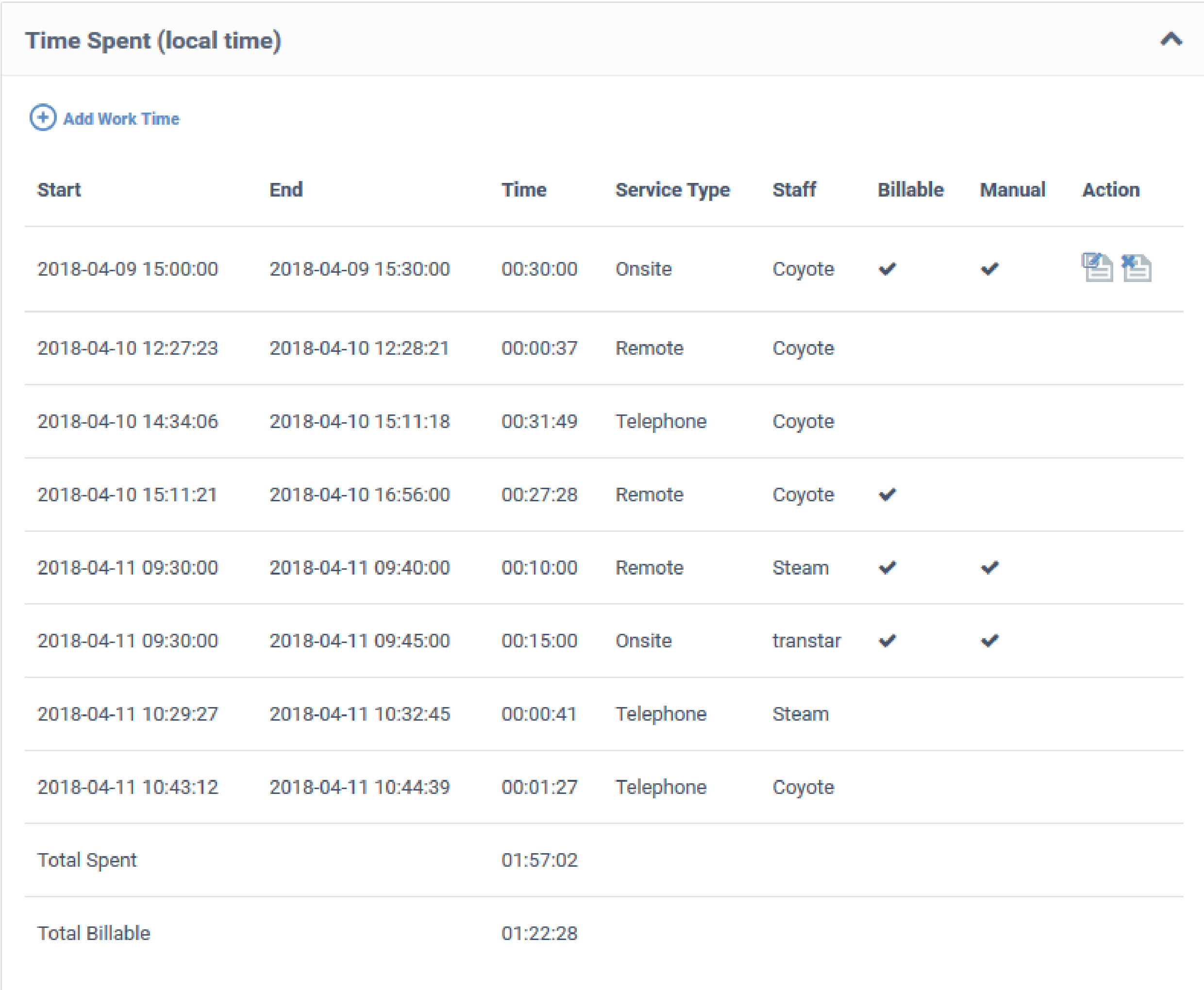
- Staff members can add items and their cost by clicking the 'Add Material' button at the top of the ticket. An administrator must approve the item before its cost is added to the ticket.
- See **Add Materials to the ticket** for more details.

Time Spent

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

To view and manage time spent on a ticket

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



Time Spent (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: • Onsite • Remote • Telephone
Staff	Name of the staff member who provided the support during the session.
Billable	Whether or not the customer will be charged for the session.
Manual	Whether or not the any time was added manually by staff. For example, to cover time spent during a site visit.
Action	Controls for editing and removing a session: - Edit the time spent

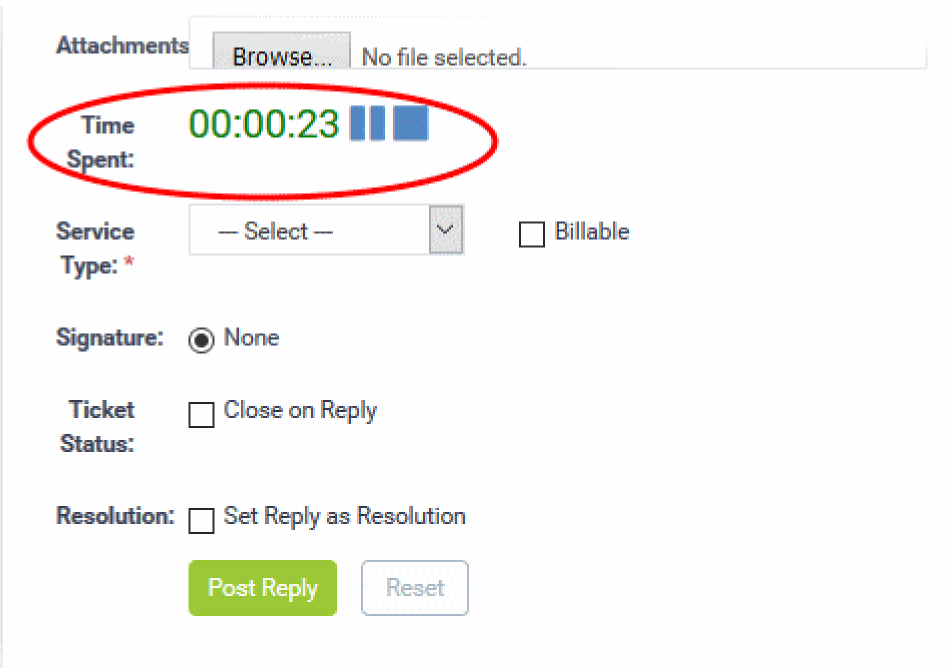
	- Delete the item

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

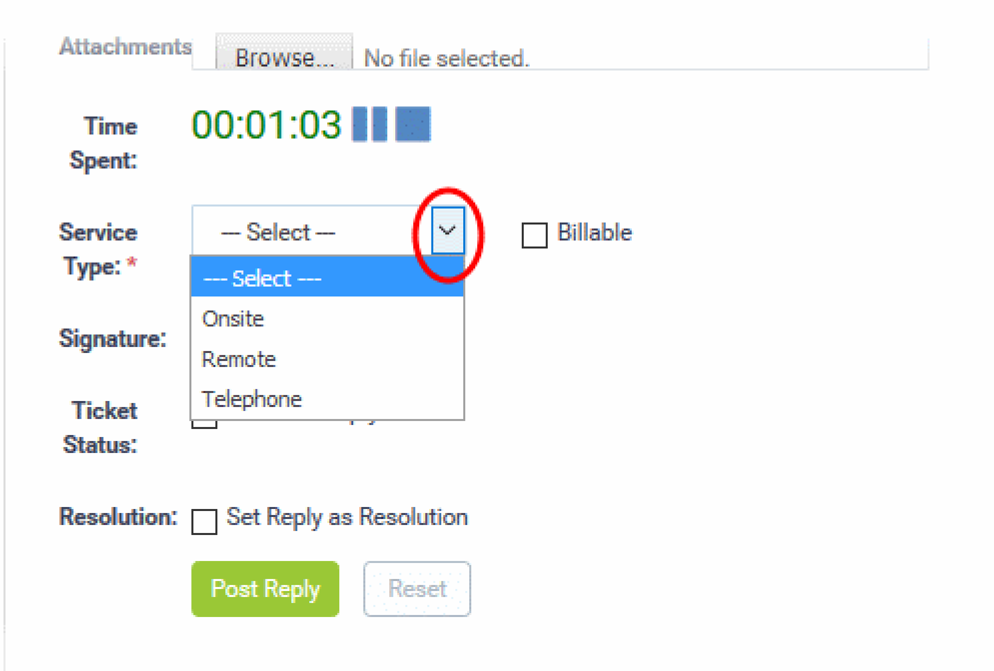
- **'Time-spent' counter**
- **Manual Entry**

The 'Time-Spent' Counter

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



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



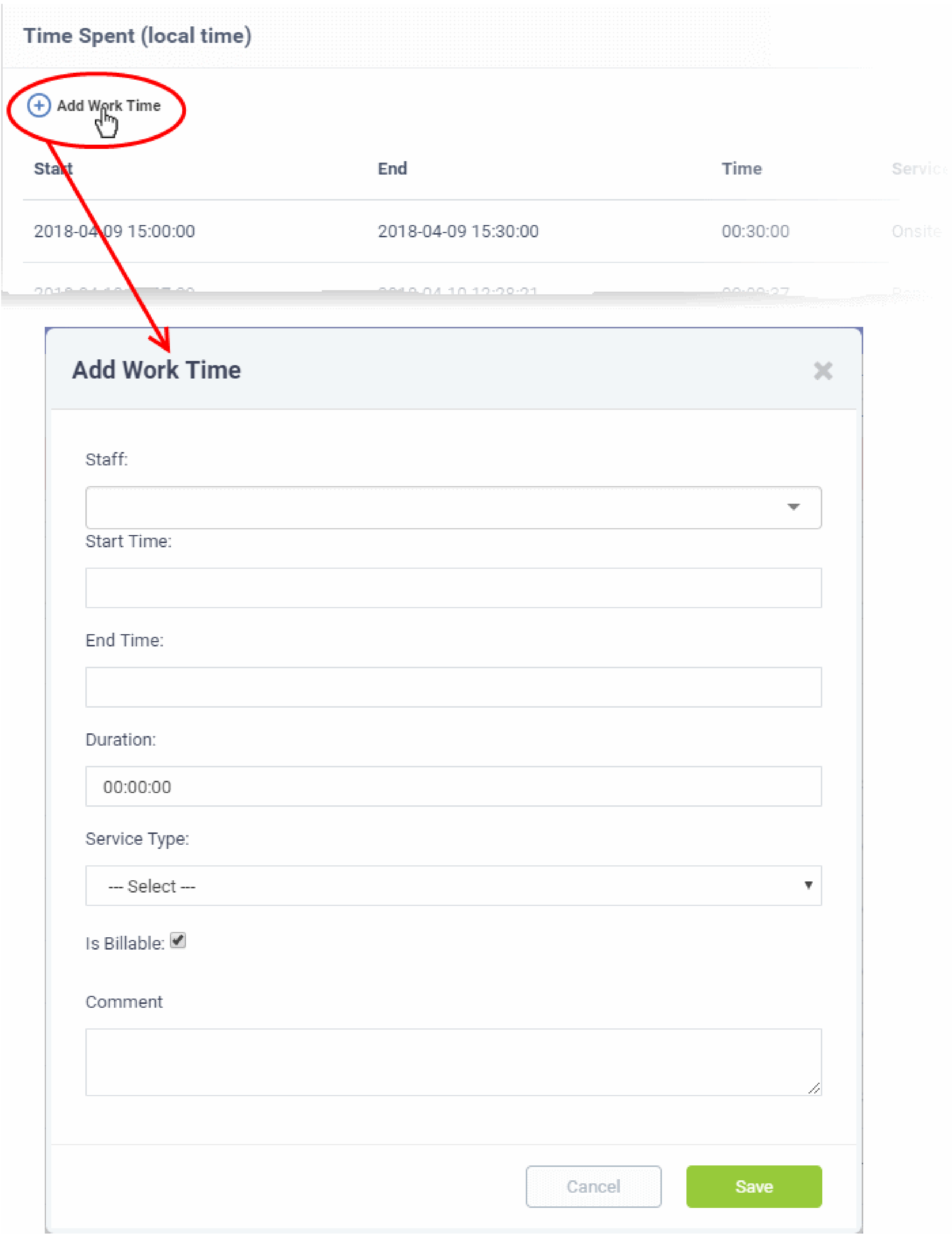
- The time spent will be automatically added to the ticket.

Manual Time Entry

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

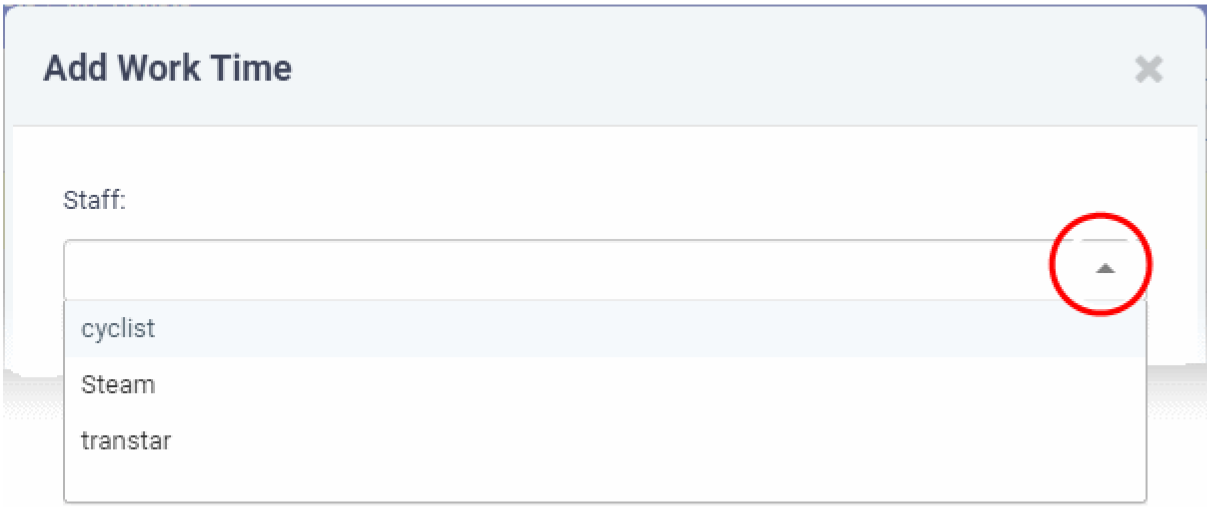
To manually add time to a ticket

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



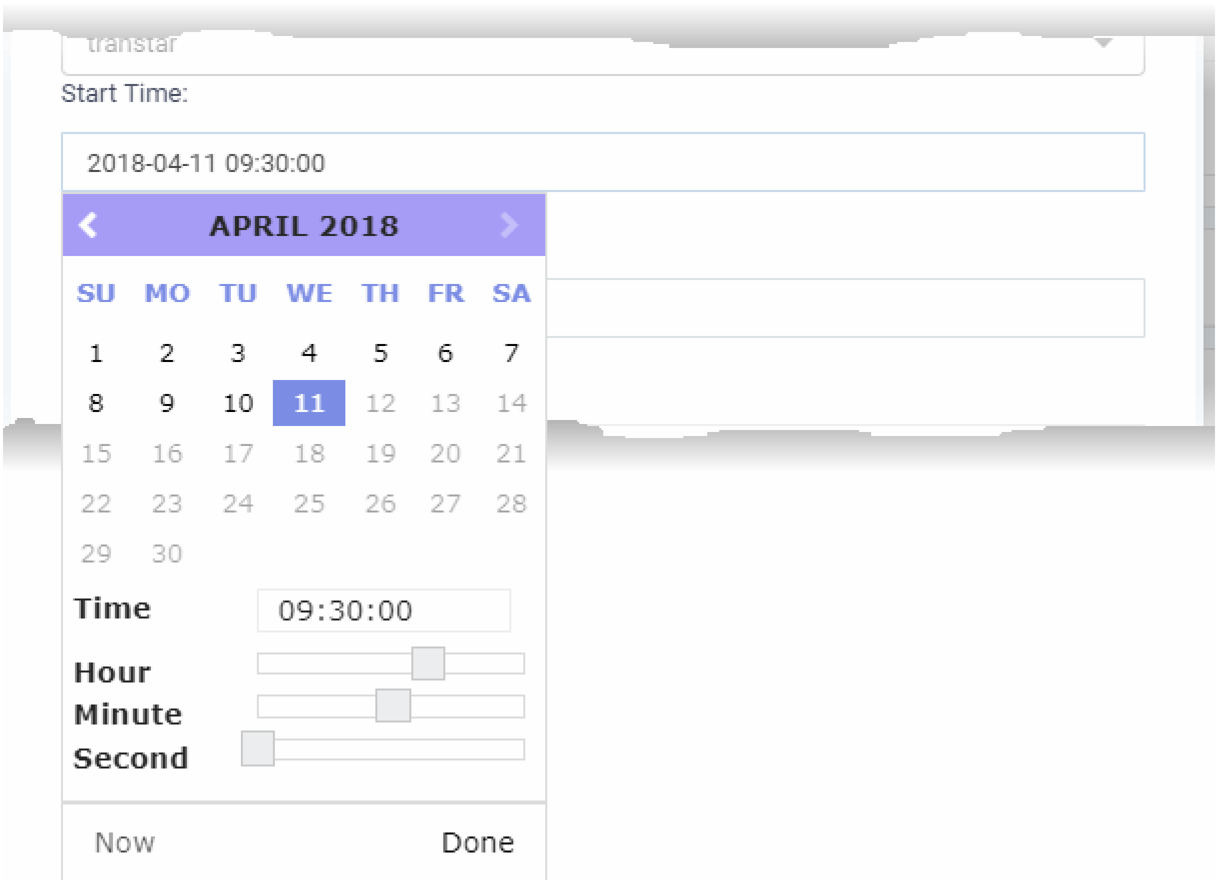
The 'Add work time' dialog will appear:

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

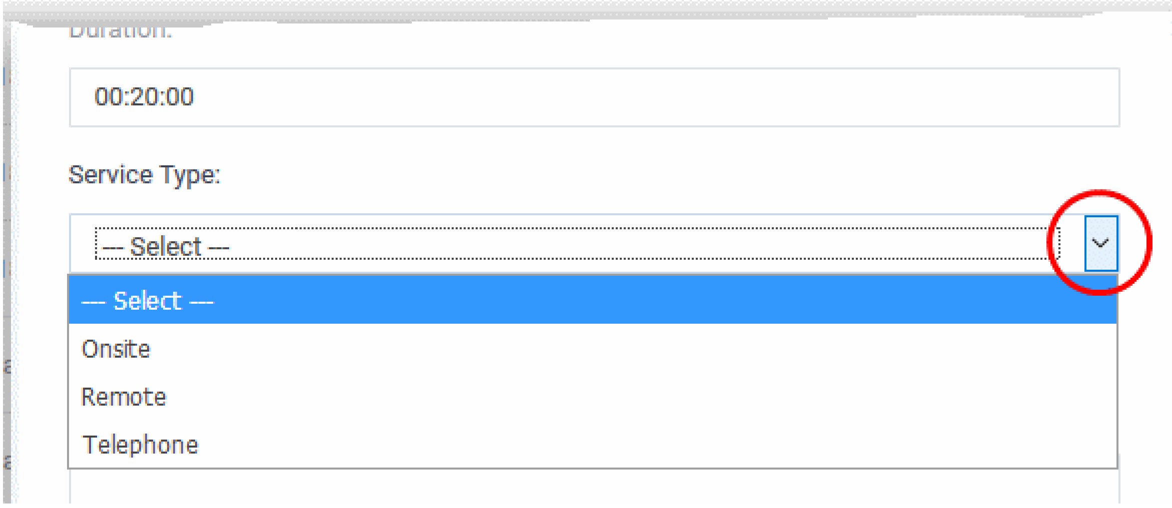


Note:The staff selection drop-down is only available to staff assigned to or added to the ticket. Time added by other staff members will be automatically included under their own name.

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



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



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

The time spent will be added to the list.

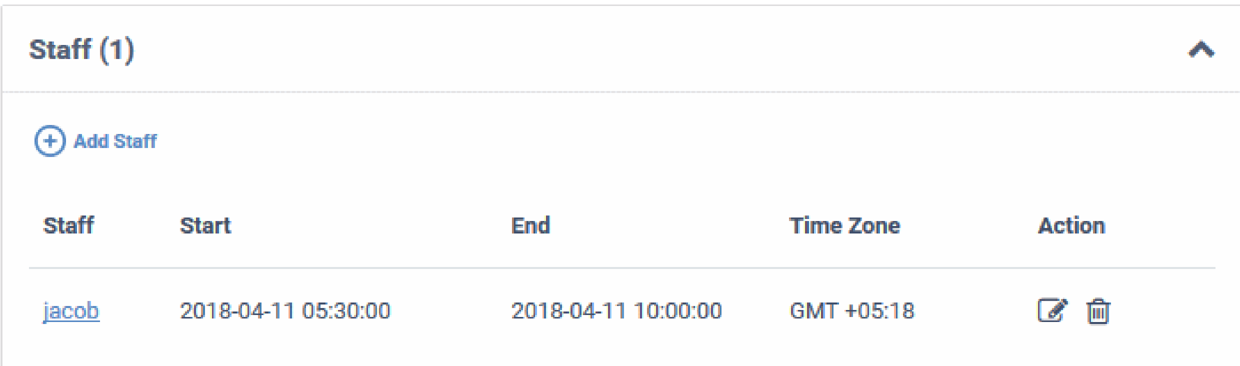
- You can edit or remove the time spent by clicking respective buttons in the 'Action' column.

Staff

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

To view and manage staff added to a ticket

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

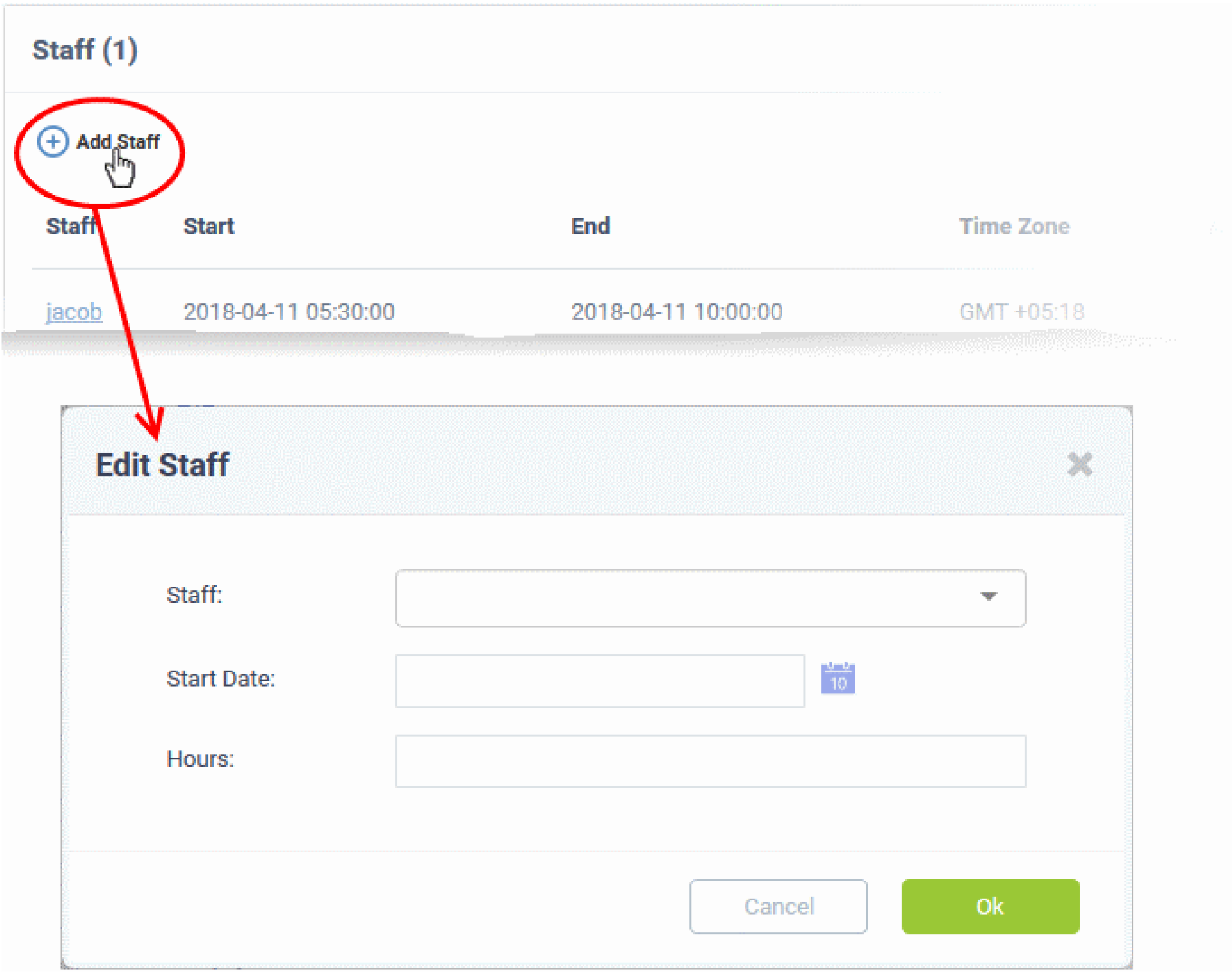


Staff - Column Descriptions	
Column Header	**Description**
Staff	The name of the staff member added to the ticket.

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

To add a new staff to the ticket

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



The 'Edit Staff' dialog will appear.

- Choose the staff member from the drop-down
- Start Date: Enter the date and time at which the staff member started working on the issue.
- Hours: Enter the approximate period of time the staff member worked on the issue. This is only a rough indicator which will not be added to the actual time spent on the ticket.
  - If required, you can manually add time to the ticket for the staff member **as described here.**
- Click 'OK'

The staff member will be added to the ticket.

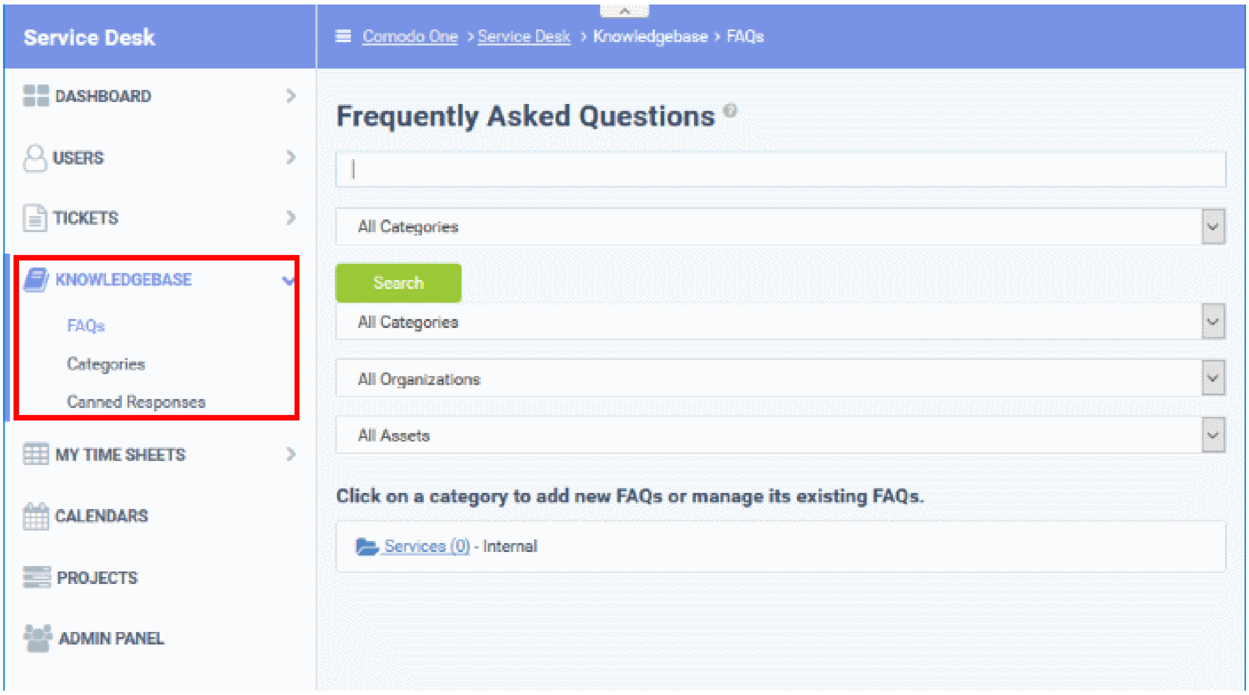
3.4 Manage Knowledgebase

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 'Staff Panel' > 'Knowledgebase'



The following sections explain more about:

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

3.4.1 FAQs

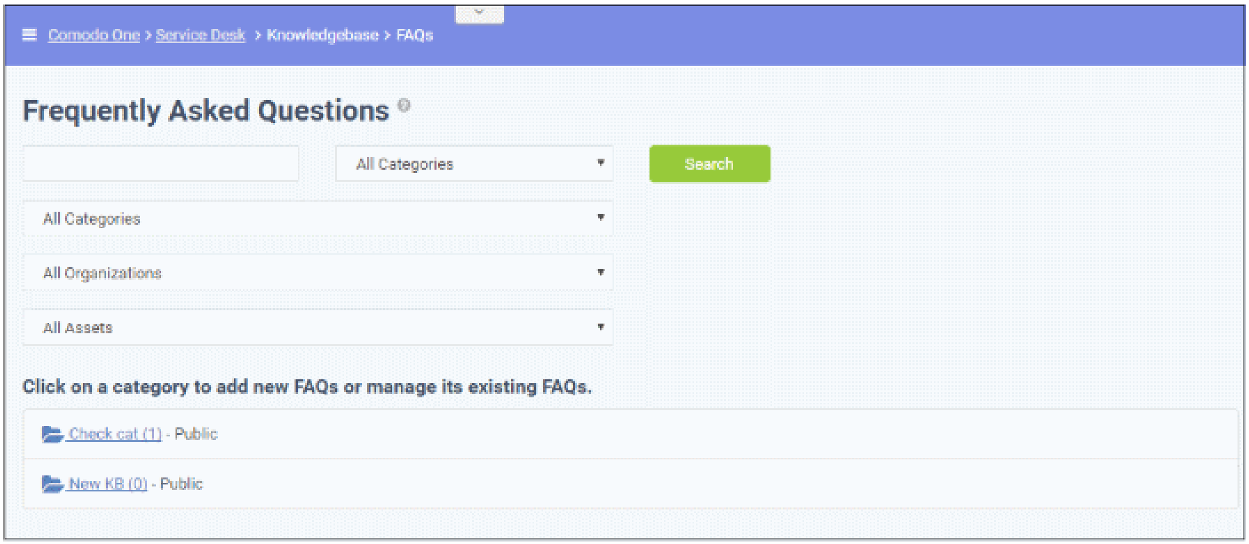
- Click 'Staff Panel' > 'Knowledgebase' > 'FAQs' to open the FAQ section.

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 'Staff Panel' > 'Knowledgebase' > 'FAQs'



Filter Options

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

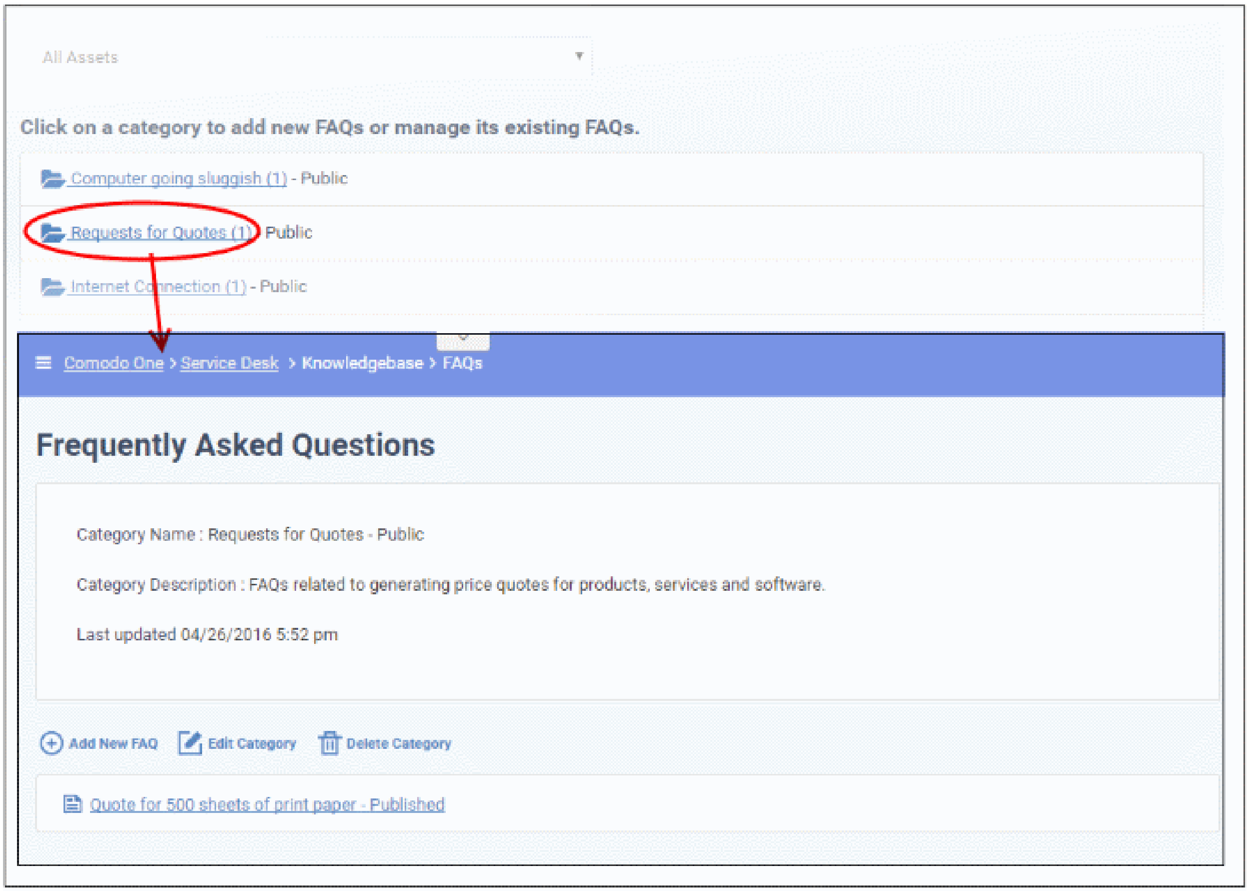
- Filters allow you to search for specific FAQs and/or narrow results by specifying the FAQ category, ticket category, organization or asset category.
- The 'All Organizations' and 'All Assets' options are used for searching ticket threads that have been added to the knowledgebase.
- To view all FAQs 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**

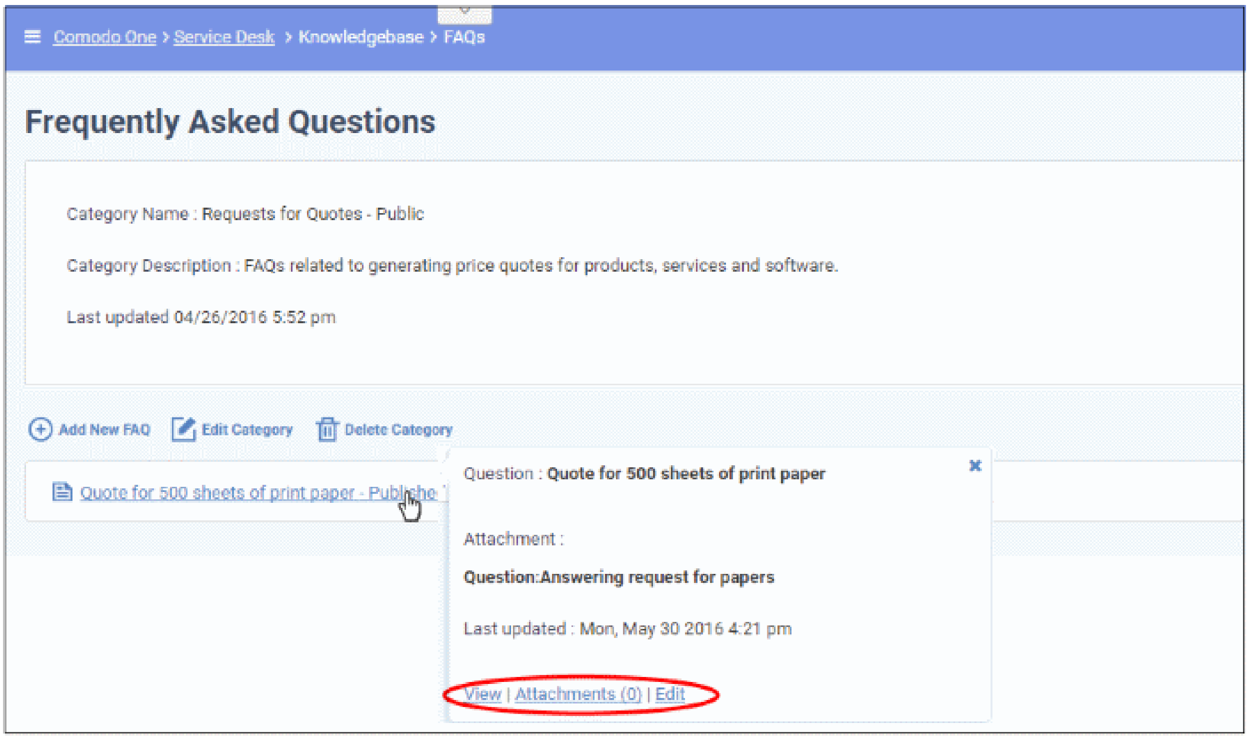
To view a FAQ

- 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 categories.

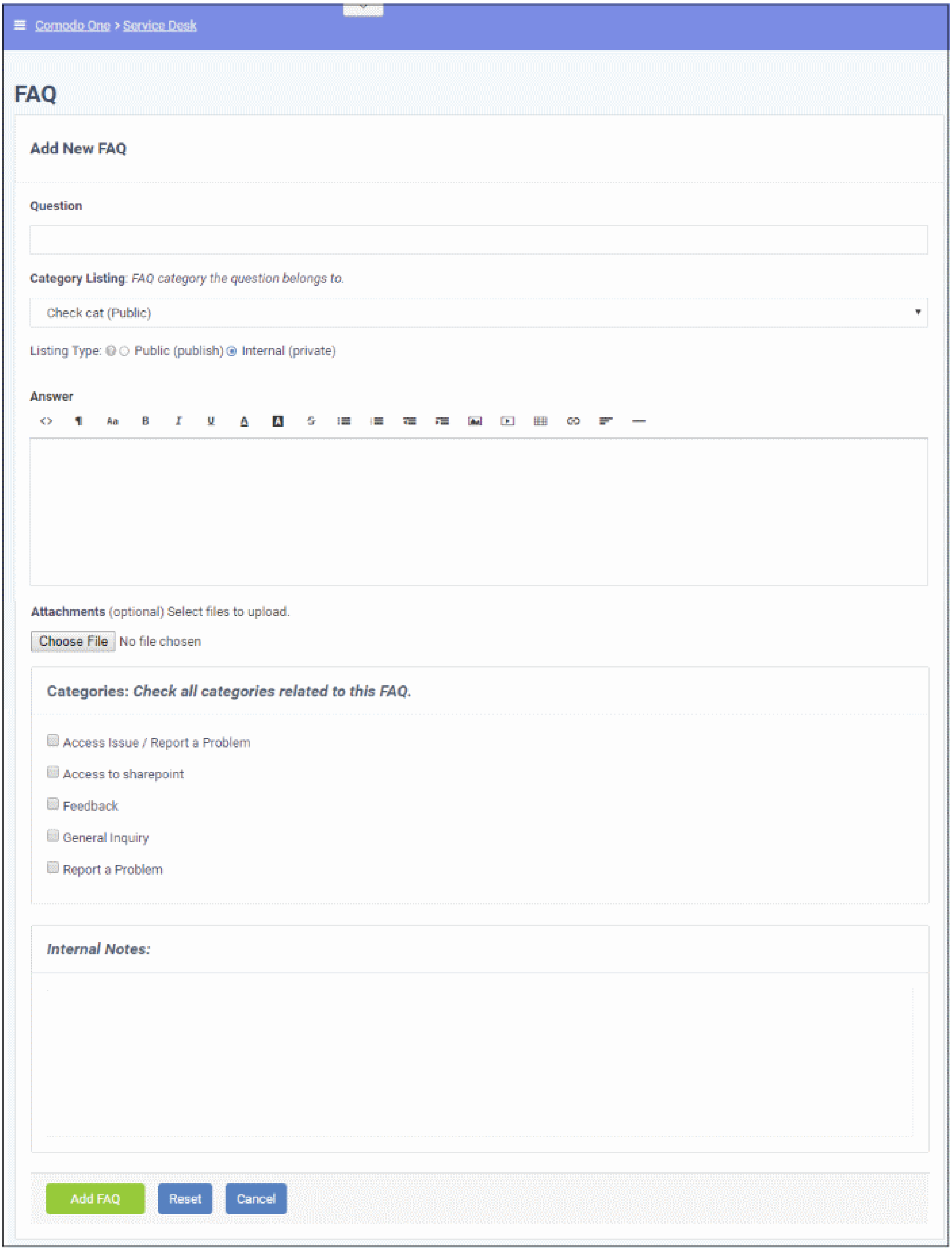
To add a FAQ to a category

- 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.



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.

Categories

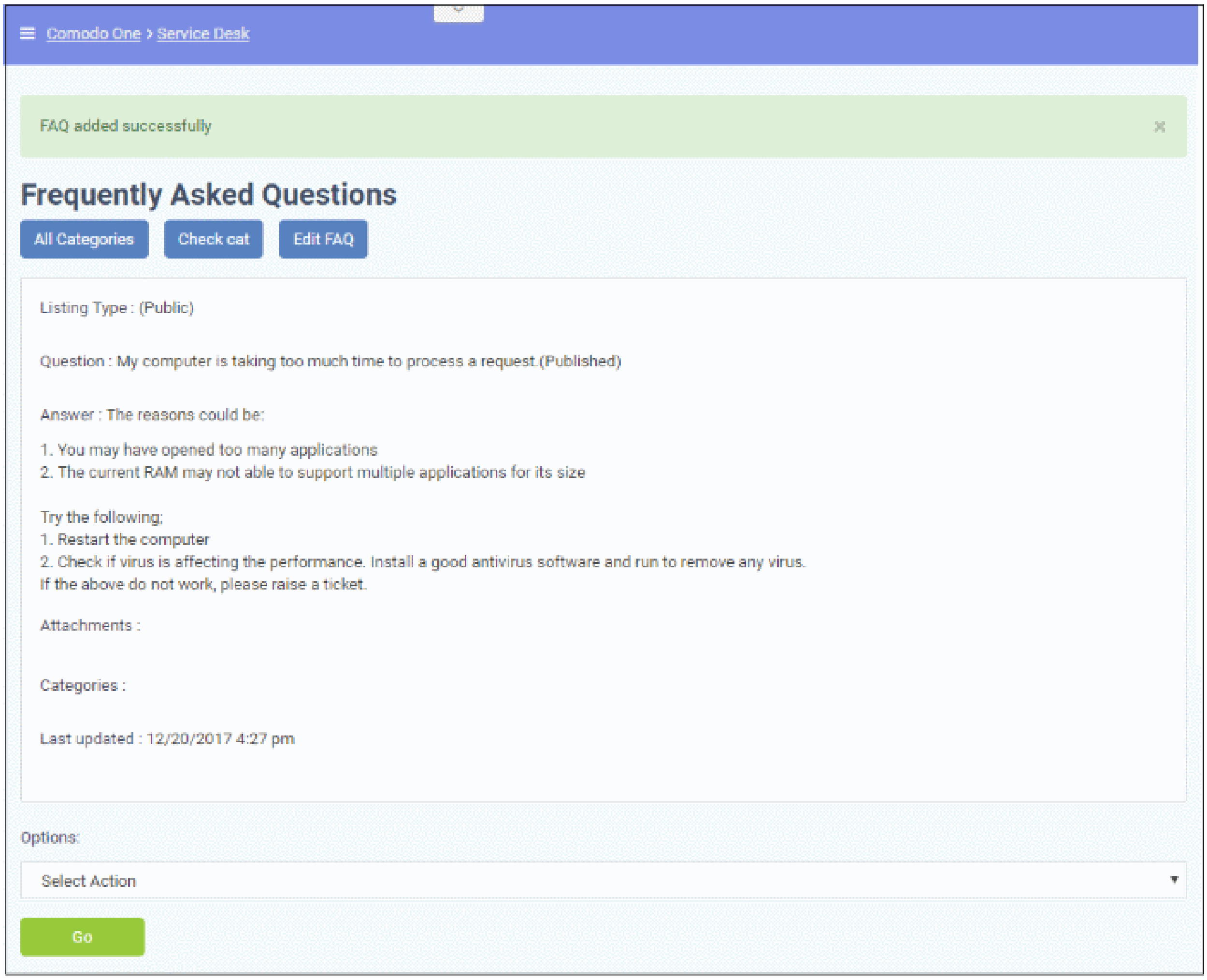
- Select help topics that should be listed as 'related' in the FAQ. This will also help users to locate the FAQ if they search by ticket category in the web portal.

Internal Notes

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

Click the 'Add FAQ' button at the bottom.

The 'FAQ successfully added' screen will be displayed.



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

Editing a FAQ

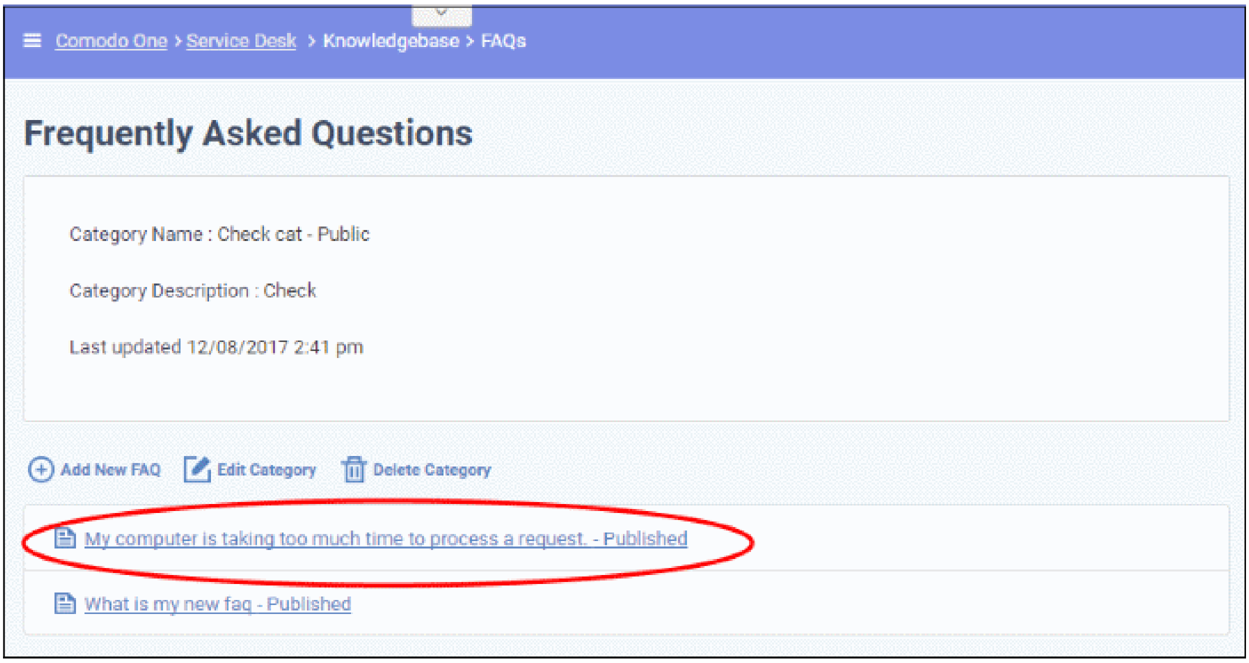
FAQs can be edited to update answers, change ticket categories, add/remove internal notes and more. This is useful to add answers for FAQs that are generated from tickets.

To edit a FAQ

- Click 'Knowledgebase' on the left then 'FAQs'

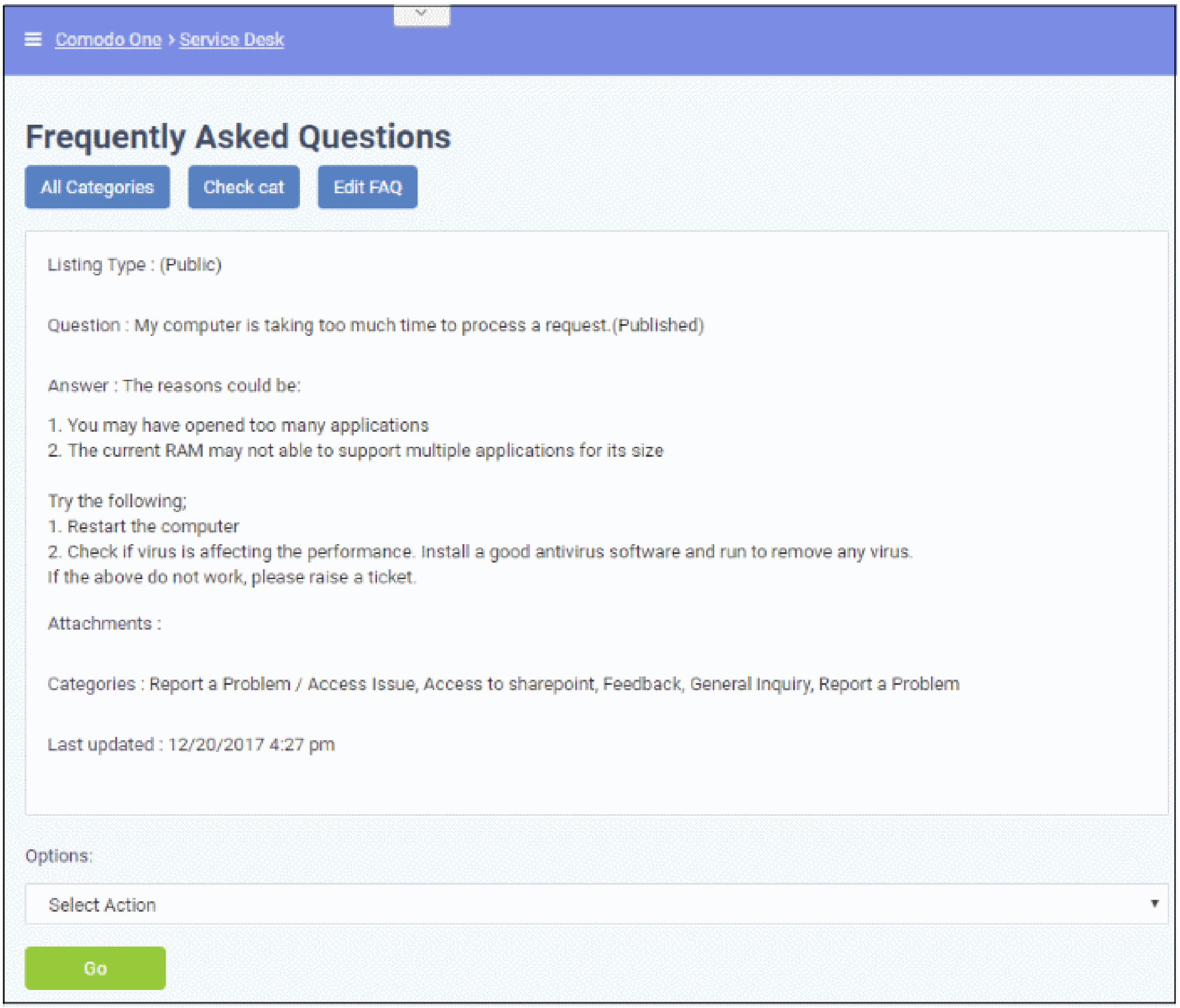
- Click the category in which the 'FAQ' that you want to edit is placed.

The list of FAQs in the category will be displayed.

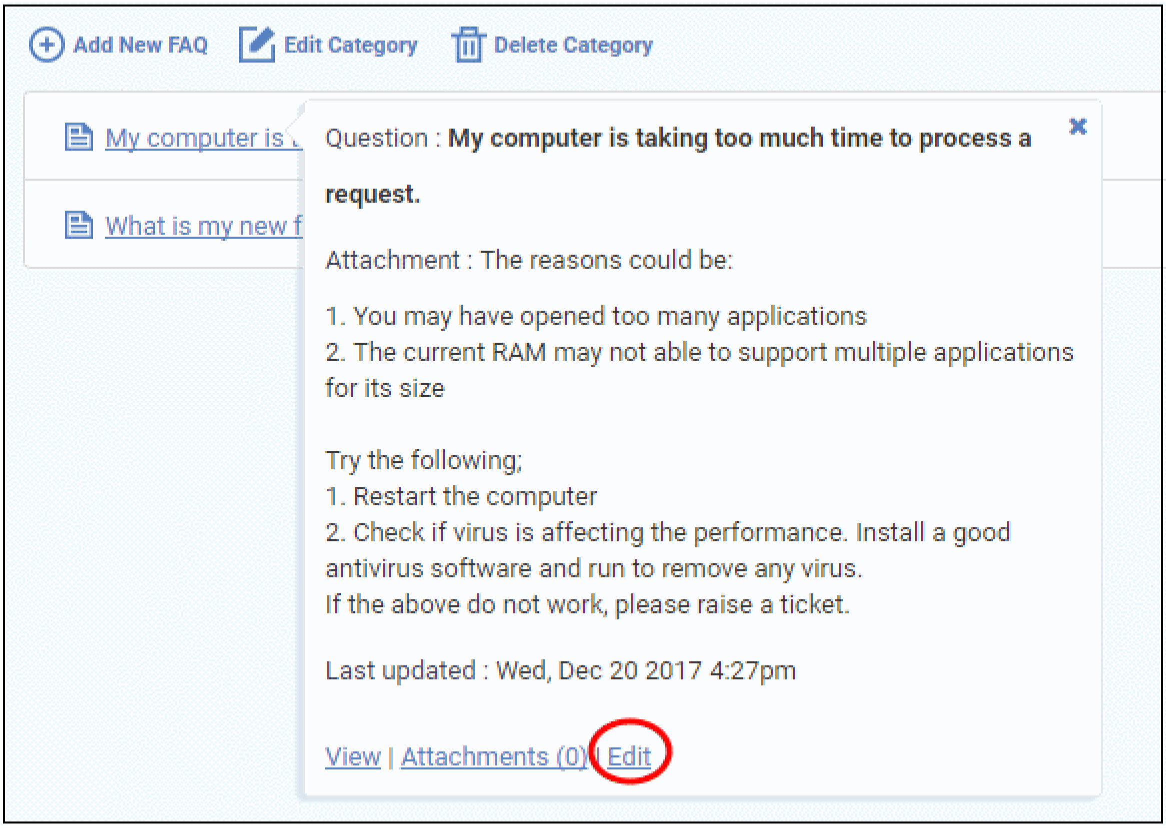


- Click the 'FAQ' that you want to edit.

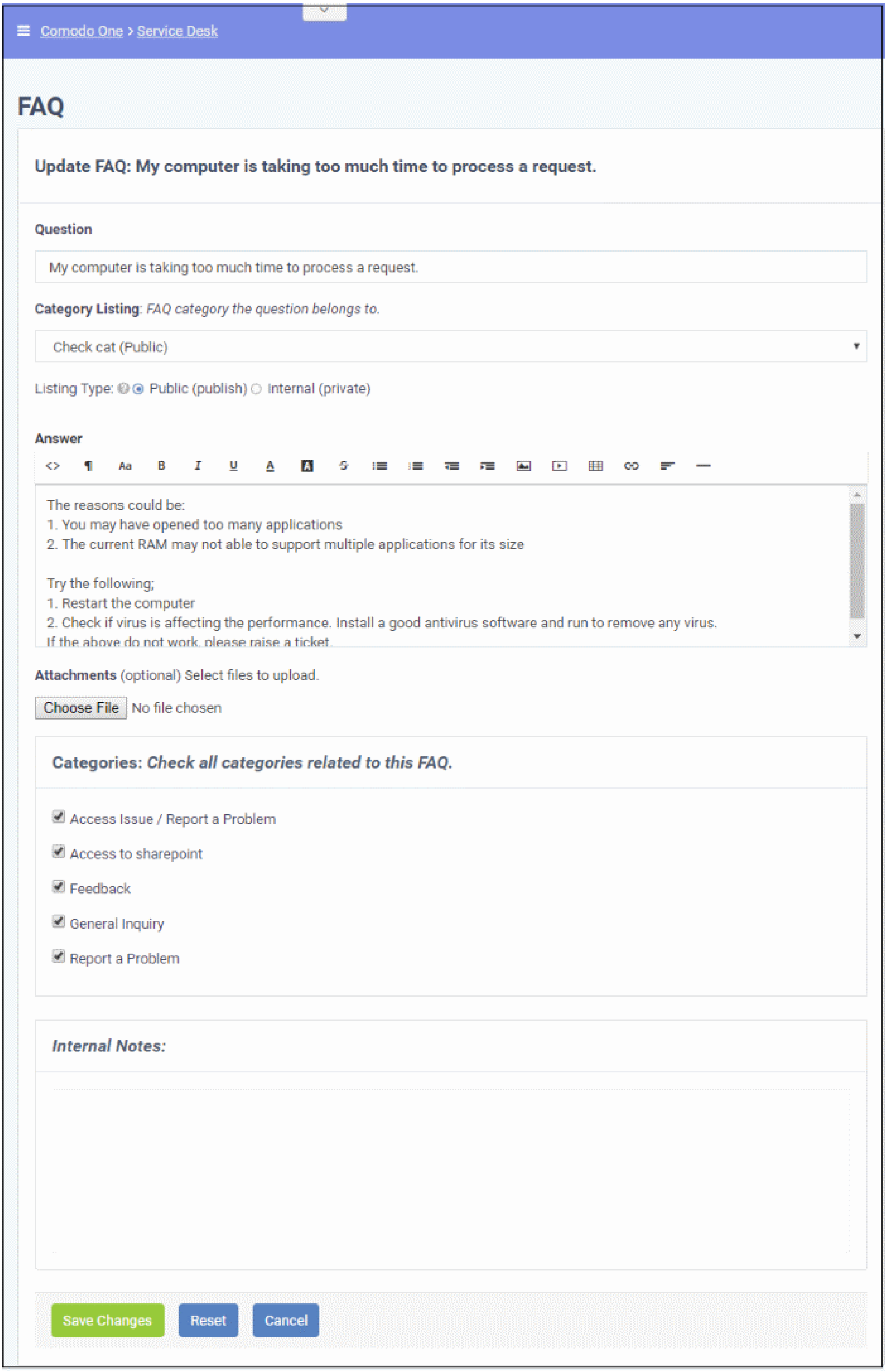
The 'FAQ' details screen will be displayed.



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



The 'Update FAQ' screen will be displayed.


Comodo One > Service Desk
FAQ
Update FAQ: My computer is taking too much time to process a request.
Question
My computer is taking too much time to process a request.
Category Listing: FAQ category the question belongs to.
Check cat (Public)
Listing Type: Public (publish) Internal (private)
Answer
The reasons could be:
1. You may have opened too many applications
2. The current RAM may not able to support multiple applications for its size
Try the following;
1. Restart the computer
2. Check if virus is affecting the performance. Install a good antivirus software and run to remove any virus.
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

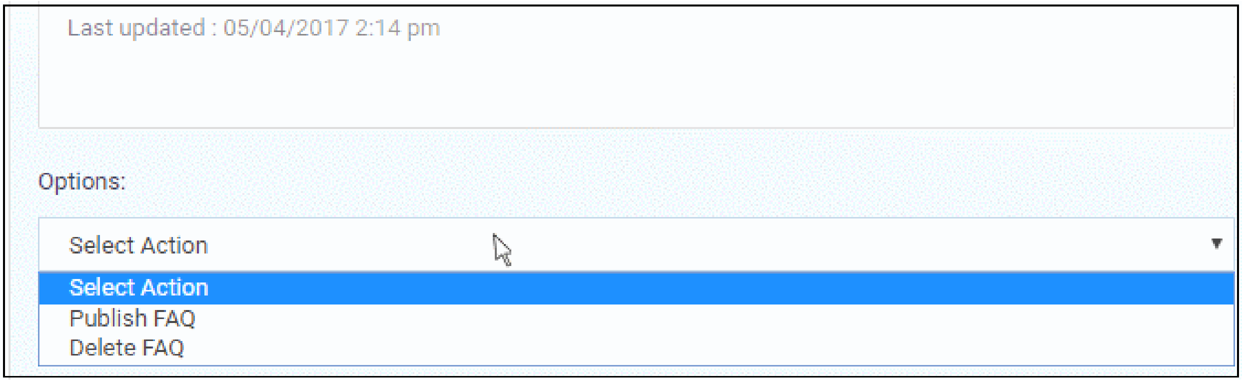
- Click the name of the category from the FAQ interface

The list of FAQs in the category will be displayed.

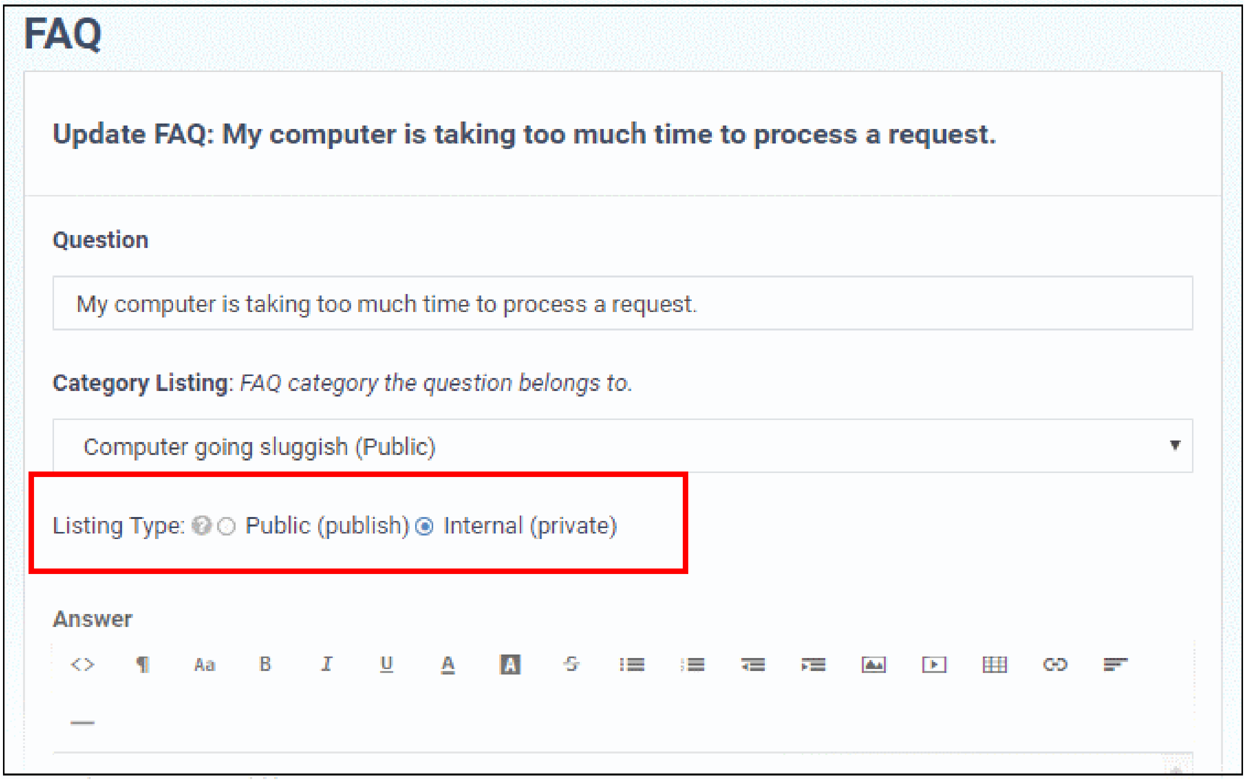
- Click the FAQ that you want to publish/unpublish

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.



Alternatively, open the 'Update FAQ' for the question by clicking 'Edit FAQ' button at the top and change the 'published' status of the FAQ. See the **explanation of editing a FAQ** for more details.



Removing a FAQ

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

To delete a FAQ

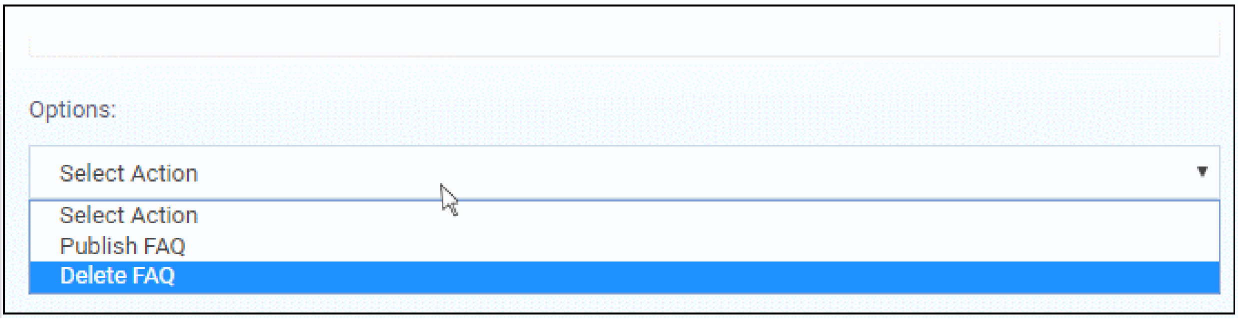
- Click the name of the category from the FAQ interface

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.



The 'FAQ' will be deleted from the category.

3.4.2 Manage Categories

- Frequently Asked Questions (FAQs) can be added to categories of your choice. New FAQs must be added to an existing category.
- Click 'Staff Panel' > 'Knowledgebase' > 'Categories' to add, view and edit FAQ categories
- Categories can be made 'Public' or 'Internal'. Individual FAQs can also be made 'Public' or 'Internal'.

    - 'Public' category + 'Internal' FAQ = FAQ is internal.
    - 'Public' category + 'Public' FAQ = FAQ is published to end-users.
    - 'Internal' category + 'Internal' FAQ = FAQ is internal.
    - 'Internal' category + 'Public' FAQ = FAQ is internal.
- To publish a category, select the checkbox next to it then click the 'Make Public' button.
- To make a category private, select the checkbox next to it then click the 'Make Internal' button.

Column Headers

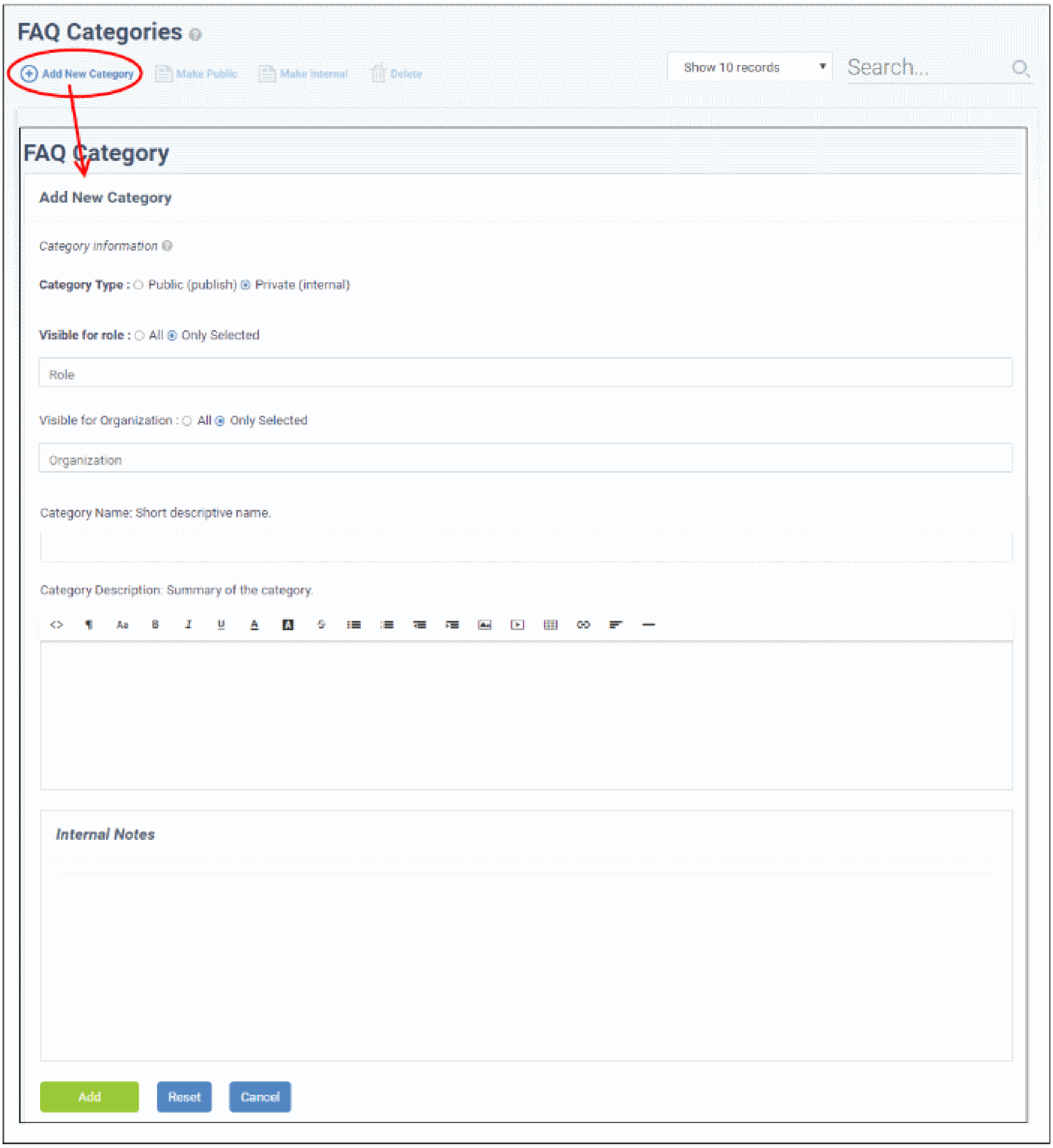
- **Name:** The name of the category. Click a name to open its **update screen**.
- **Type:** Indicates whether the category is published or internal.
- **FAQs:** Displays the total number of FAQs available under the category. Click a number to open the respective 'FAQ Category' screen. See '**FAQs**' 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



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 '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.

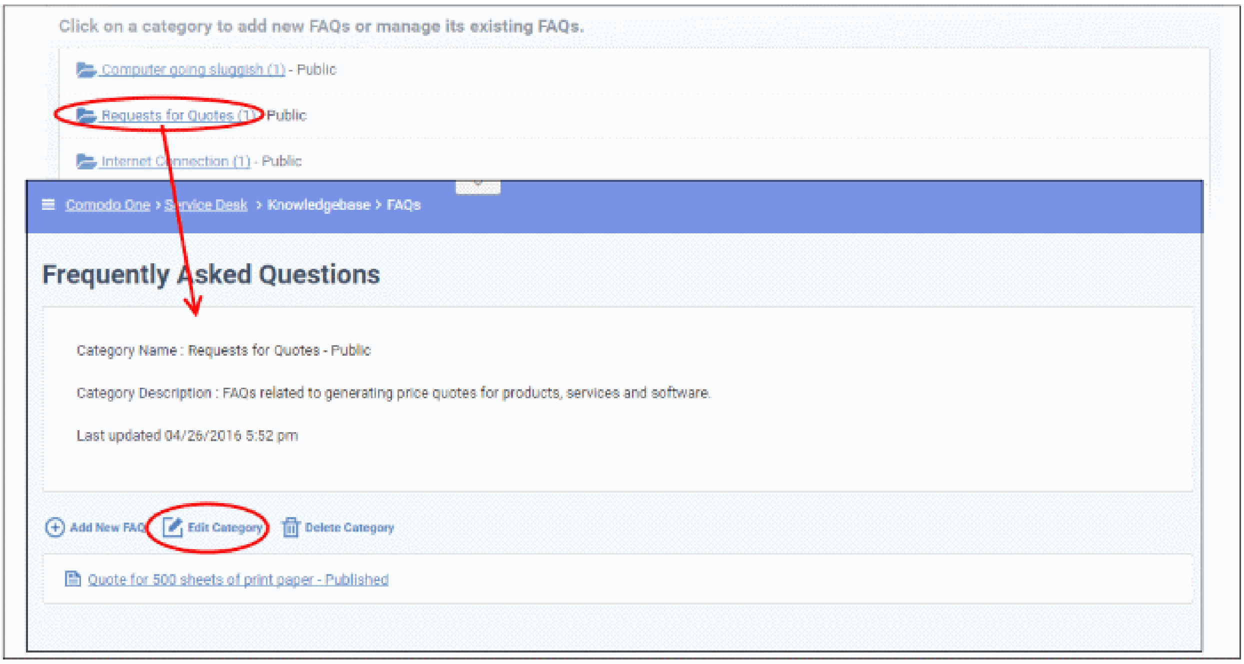
- Click the 'Reset' button to clear the fields.

- Click the 'Add' button to save the category.

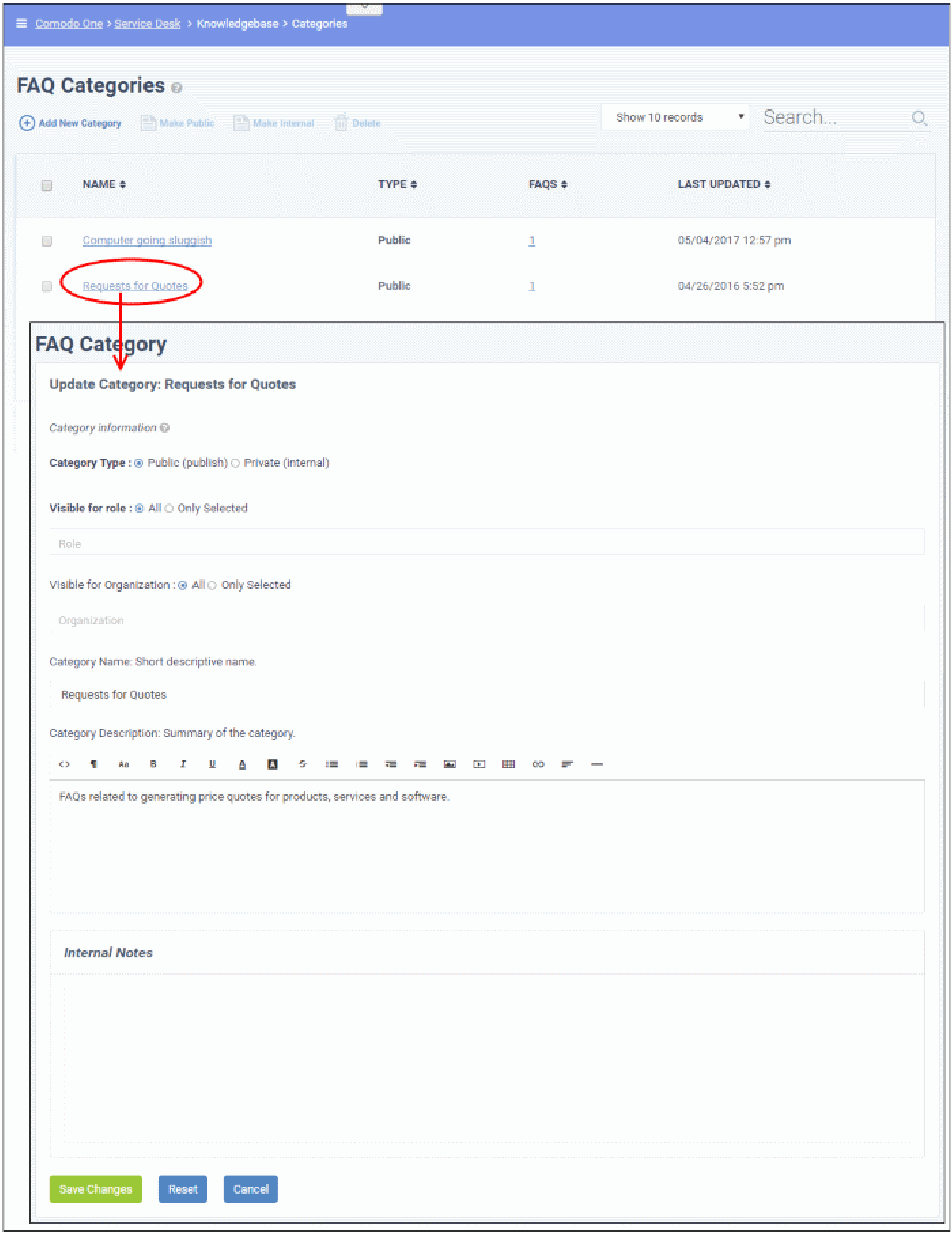
To edit a category

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

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



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

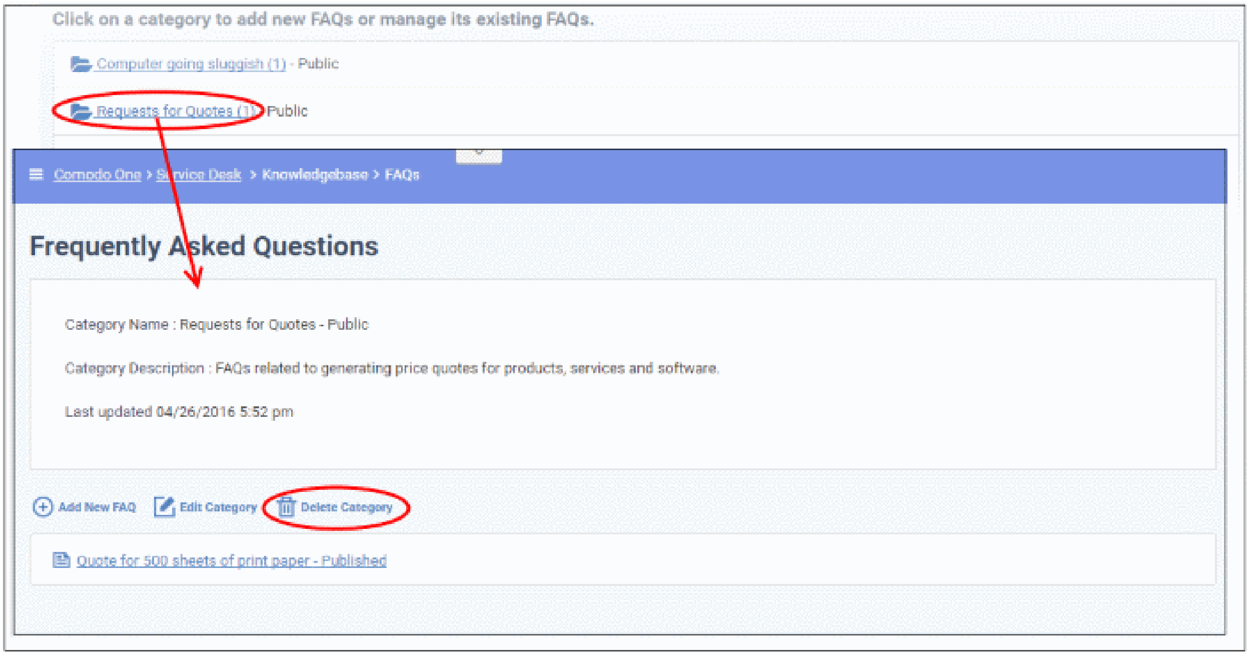


- Edit the category as required and click the 'Save Changes' button.

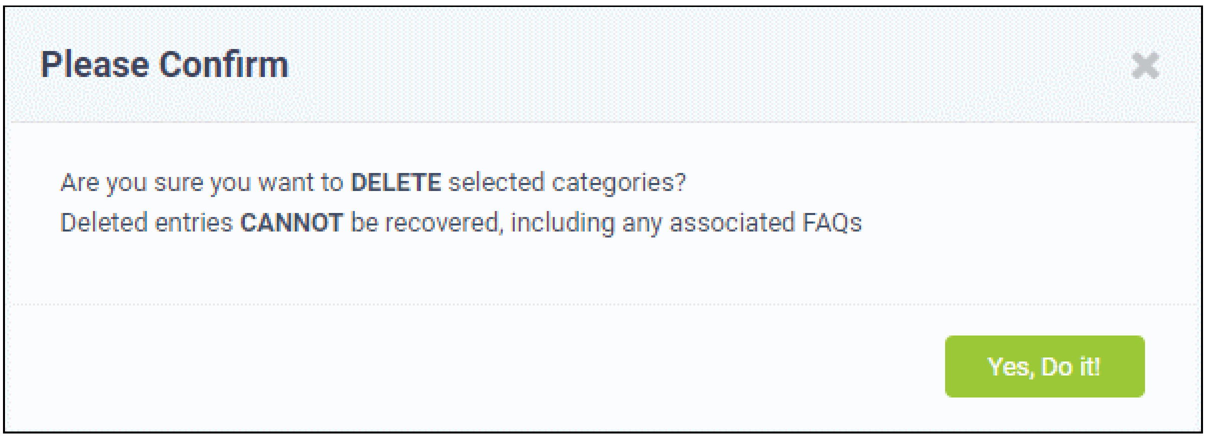
To delete a category

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

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



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

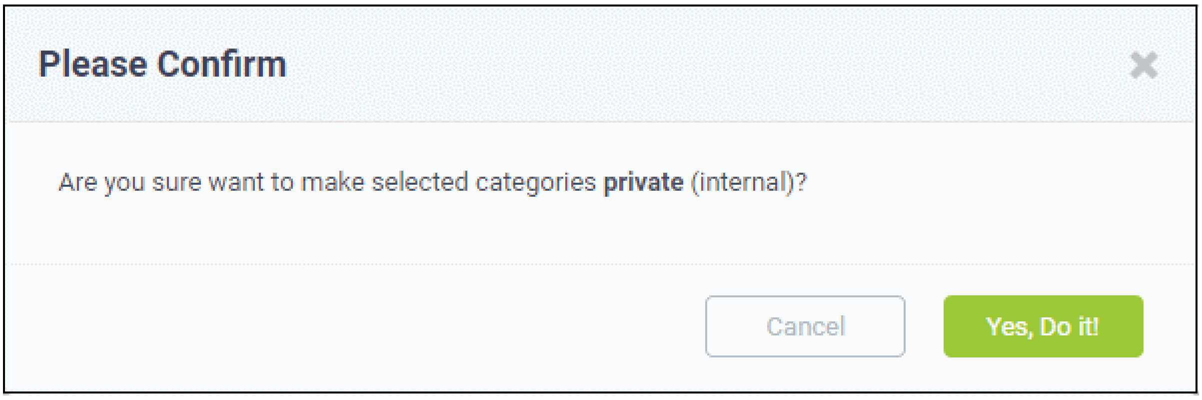


Note: Removing a category will also delete the FAQs under it.

To mark a category as public or private

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

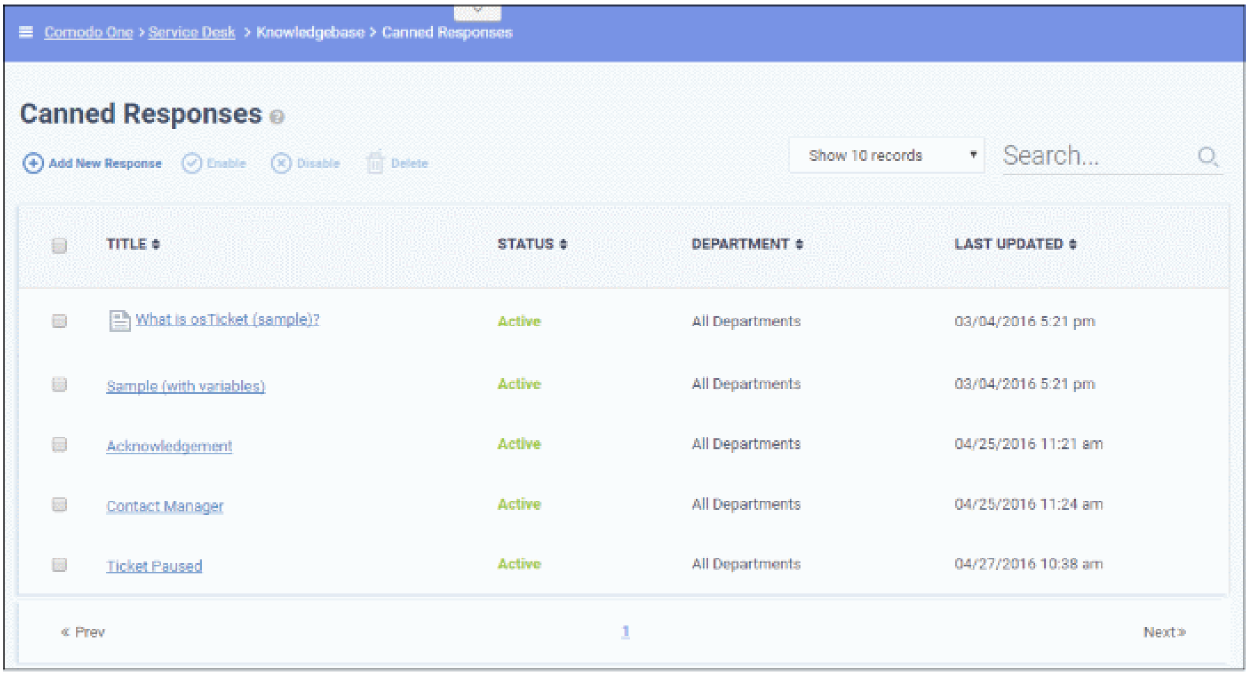
  - To publish a category, select it and click the 'Make Public' button.
  - To make a category as private, select it and click the 'Make Internal' button.
- In the confirmation screen, click the 'Yes, Do it!' button.



3.4.3 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. You 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'.



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

Column Headers

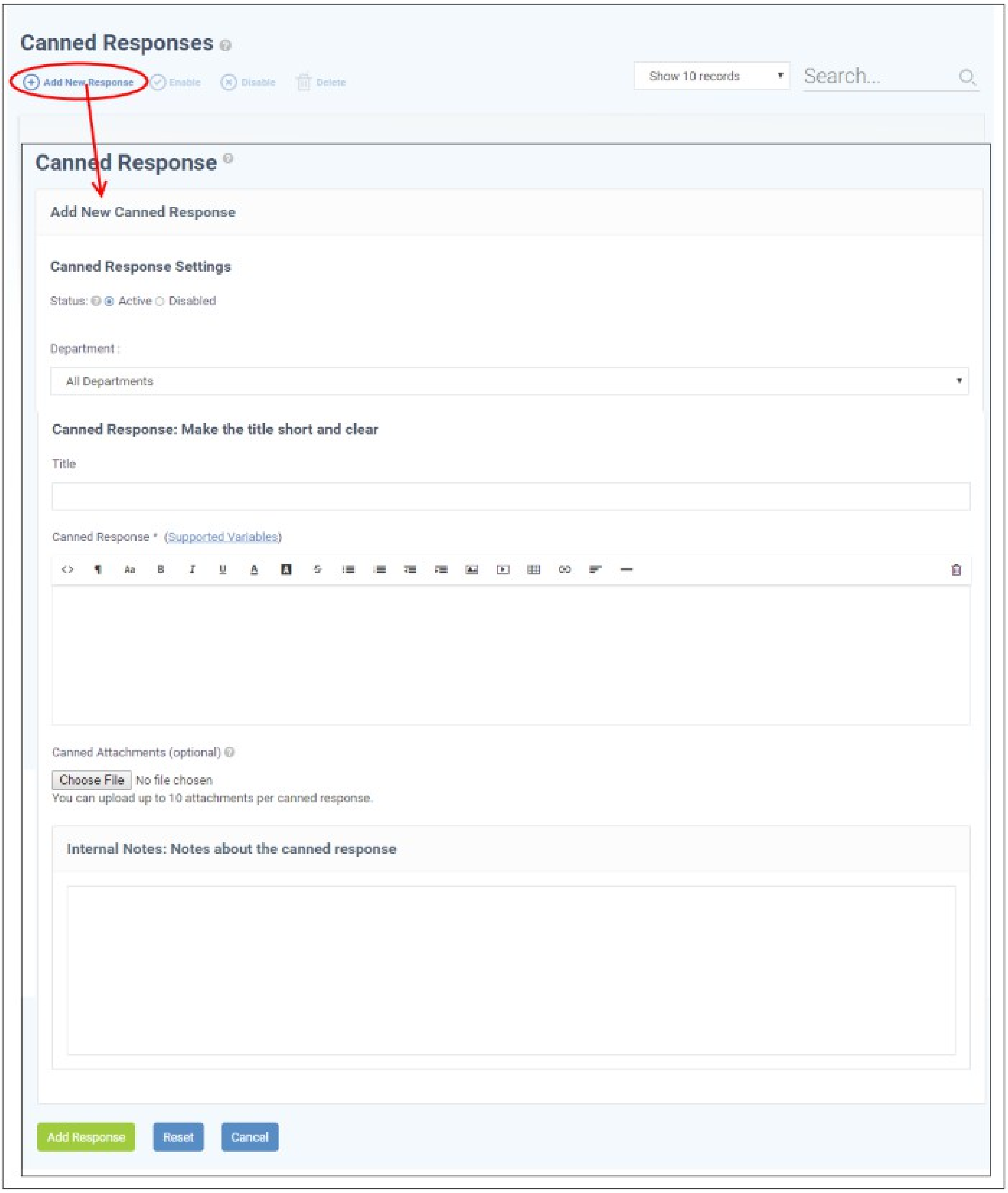
- **Title:** The name of the 'Canned Response'. Clicking a name will open its **update screen**.
- **Status**: Indicates whether the 'Canned Response' is active or disabled. Only 'Active' responses will be available for selection from 'Ticket Details' interface while managing a ticket. See **Ticket Details**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

From the interface, a staff member can:

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

To add a new 'Canned Response'

- Click 'Add New Response' at the top



The 'Add New Canned Response' screen will appear.

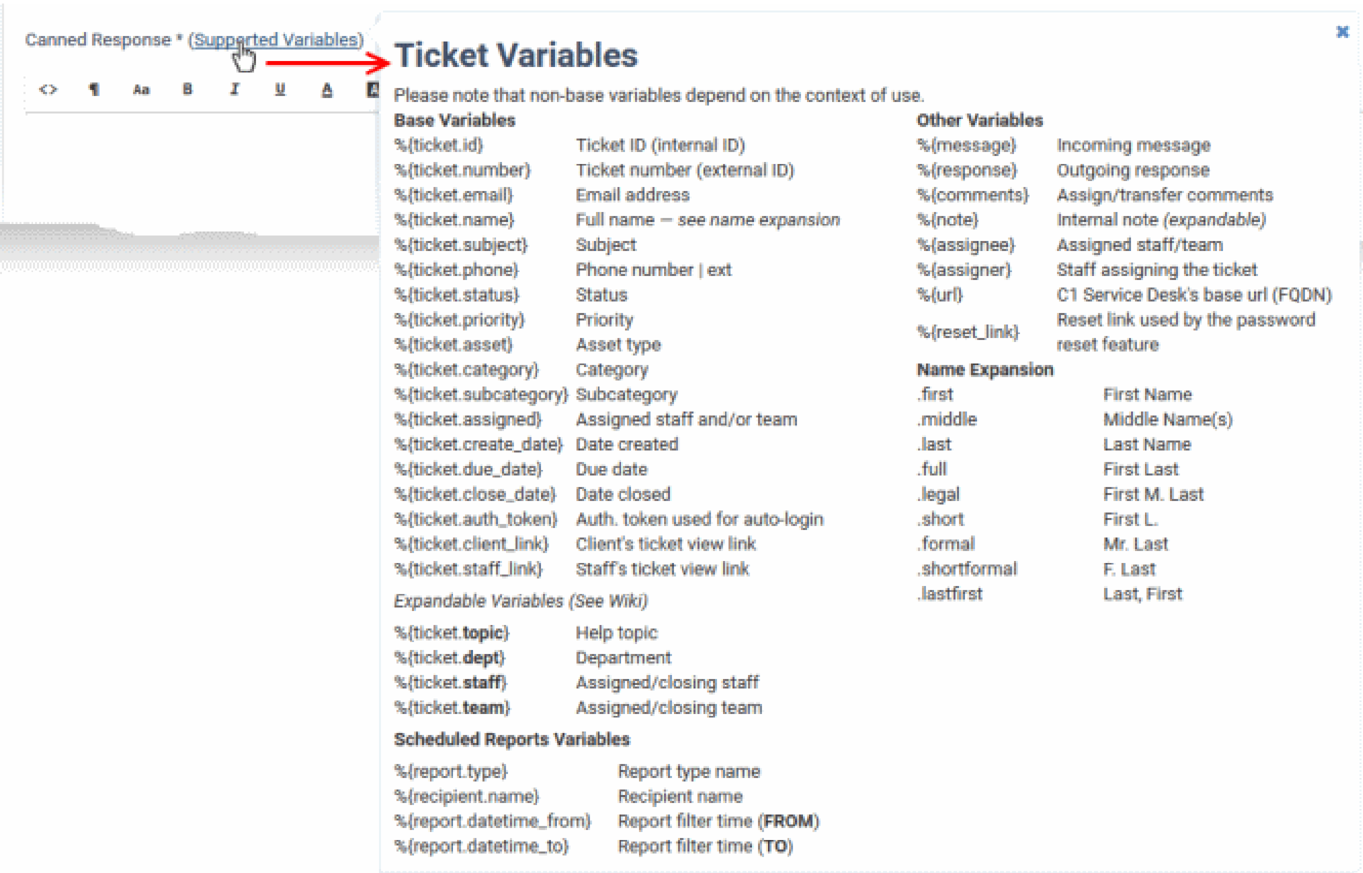
Canned Response Settings

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

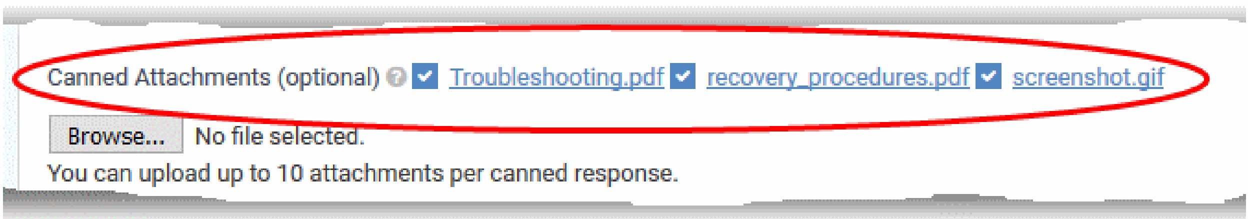
for all ticket responses.

Canned Response

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



- To clear the text, click the trash can icon at the top right.
- **Canned Attachments**: To add attachments to the reply, click the 'Browse' button, navigate to the location of the file and select the file to be attached. You can attach a maximum of 10 files per 'Canned Response., but one at a time. To append more attachments, **edit** the 'Canned Response' and add the attachments one-by one.
  - To remove an attachment, clear the checkbox beside the attachment

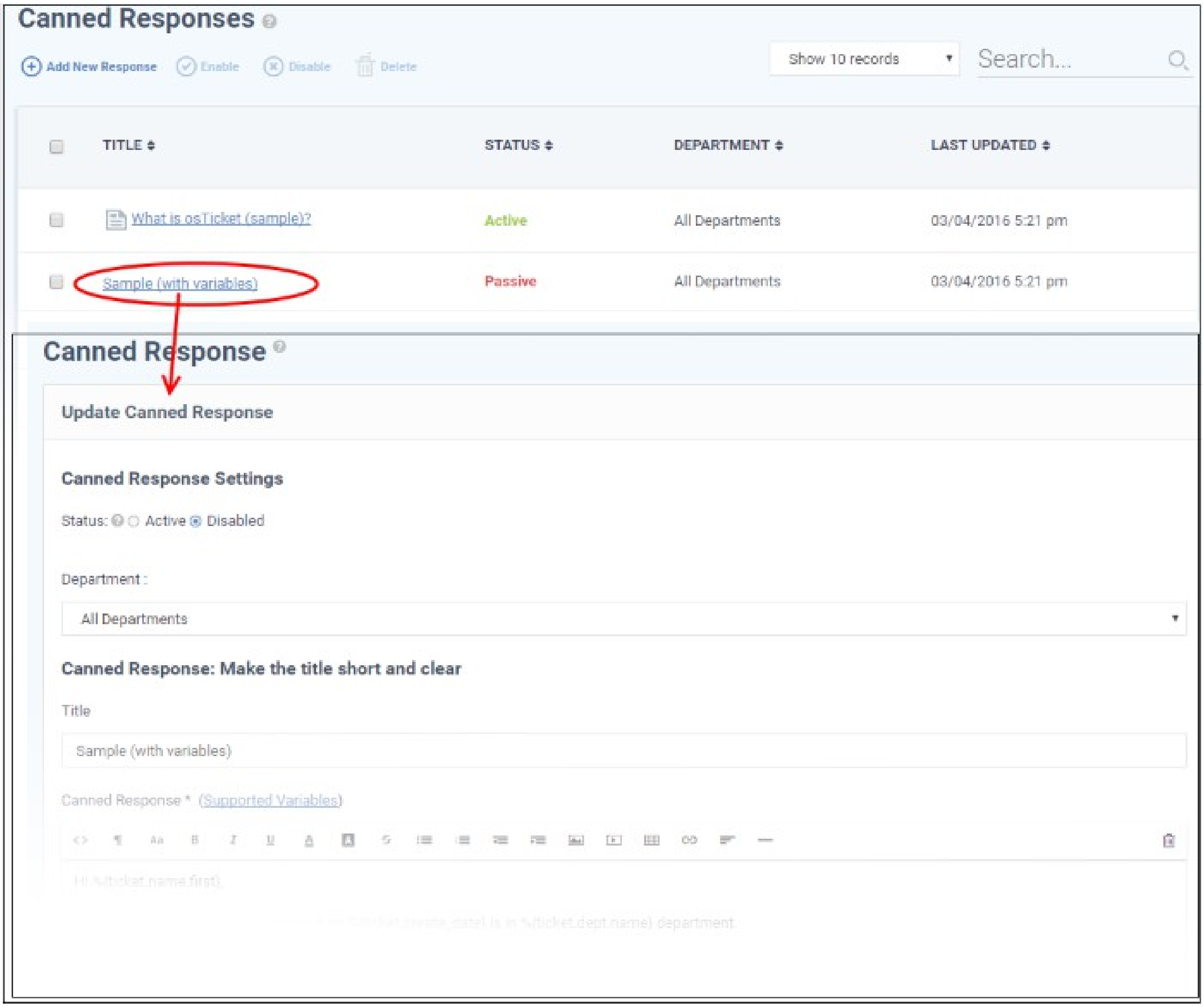


Internal Note

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

To edit a 'Canned Response'

- Click the canned response to be edited

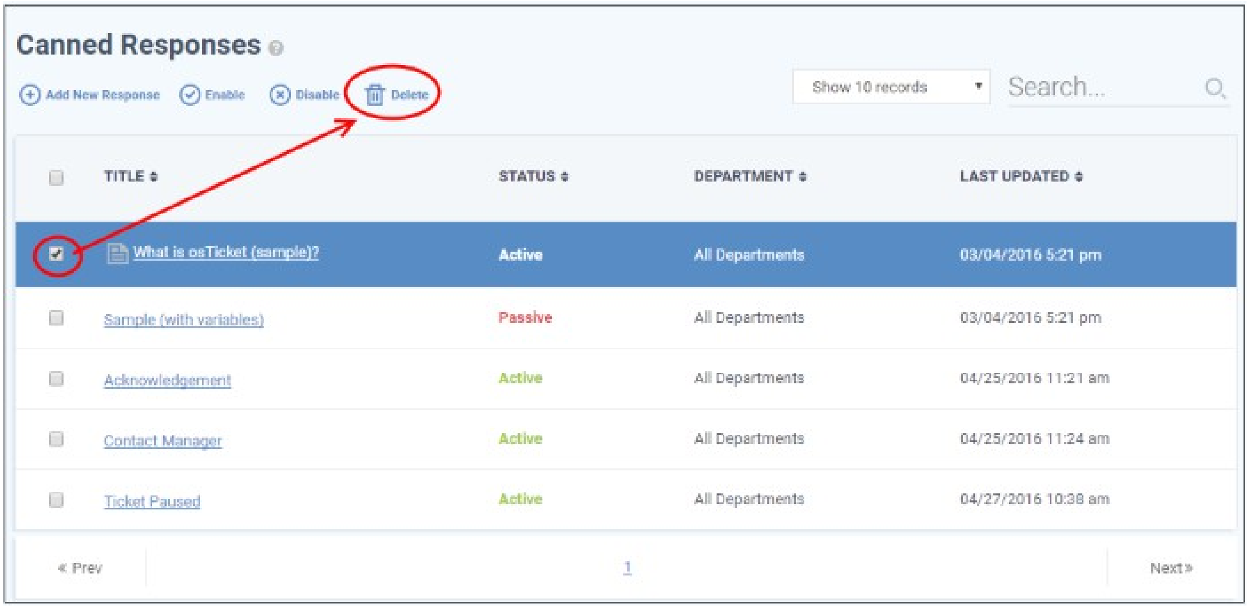


The 'Update Canned Response' screen will be displayed. The screen is similar to Add a New Canned Response screen. For descriptions of the parameters, see the **explanation of adding a new canned response**.

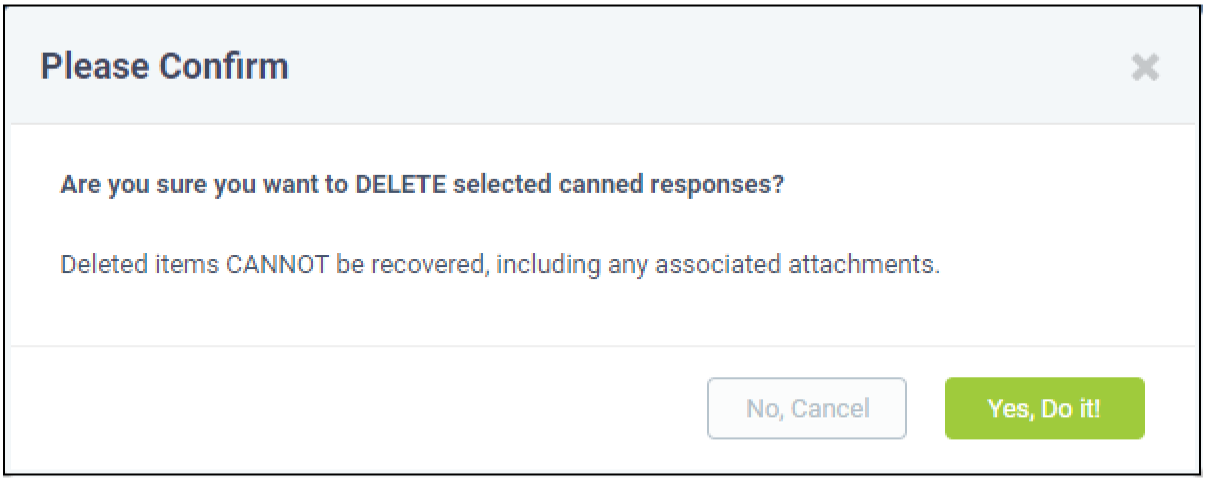
- Edit the canned response as required and click the 'Save Changes' button.

To delete a 'Canned Response'

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

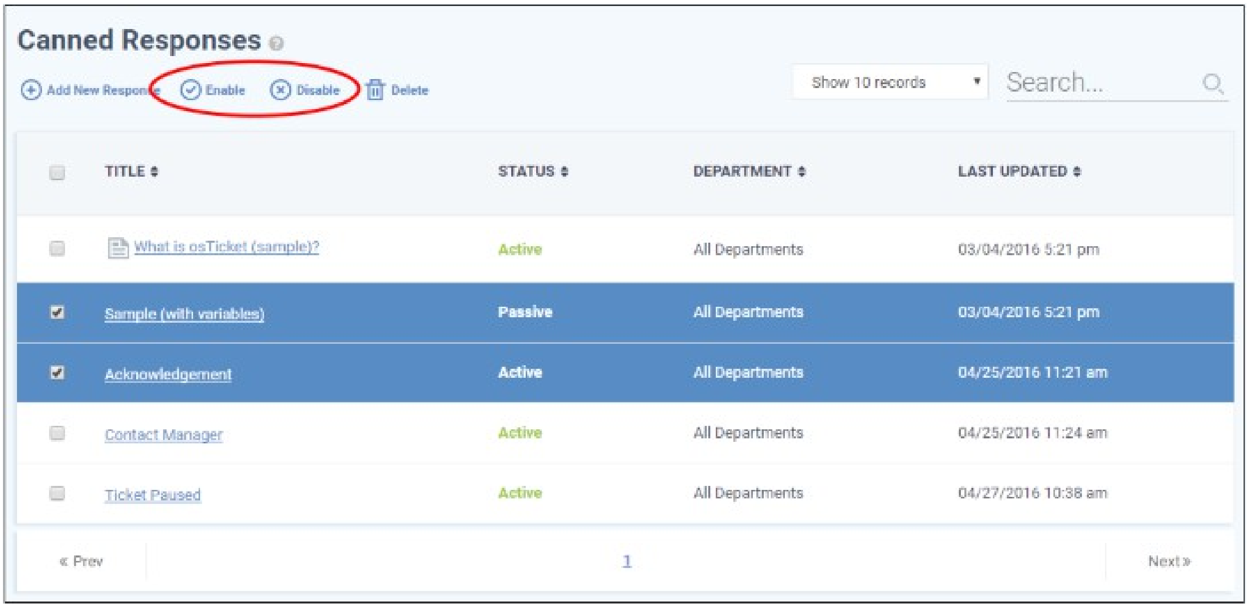


- Click the 'Yes, Do it!' button in the confirmation screen.

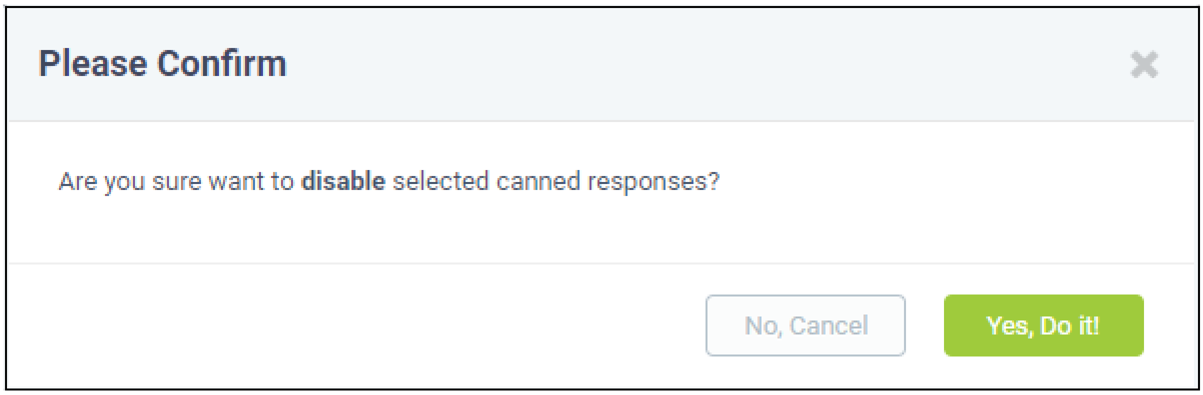


Enable or disable a 'Canned Response'

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



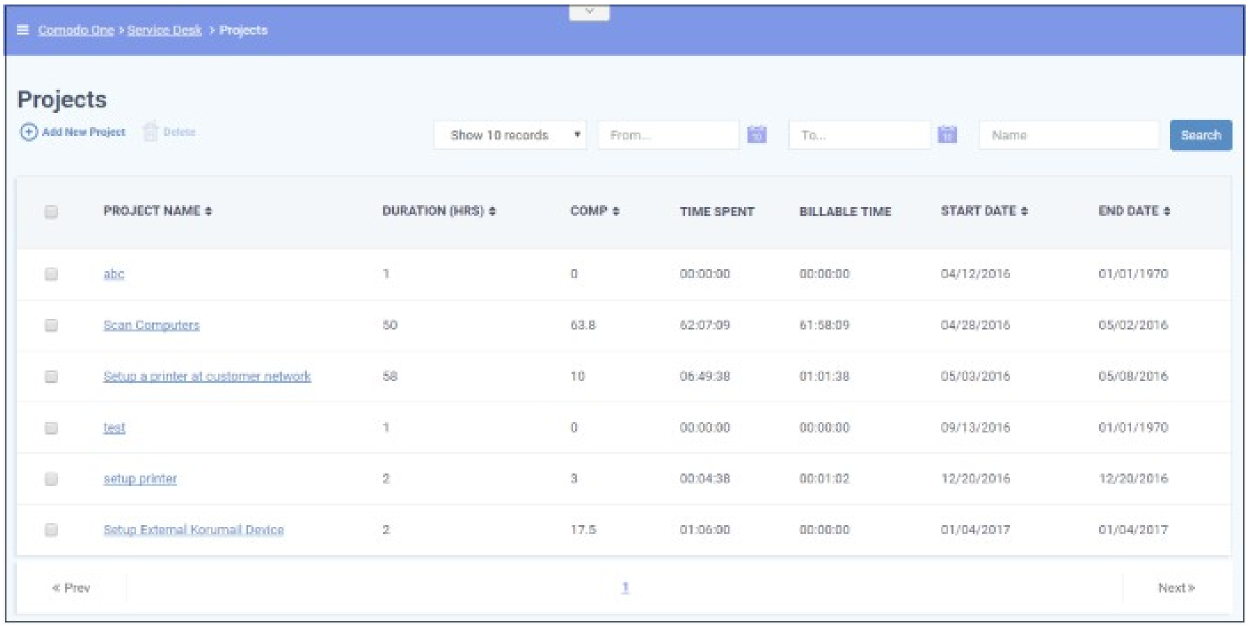
- Click the the 'Yes, Do it!' button in the confirmation dialog.



3.5 Manage Projects

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

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



Existing projects are listed in the first column.

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. The default value can be set in the '**My Profile**' interface. You can navigate to different pages by clicking 'Next' and 'Prev'.

Search Option

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

Column Headers

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

From the Projects interface, staff members can:

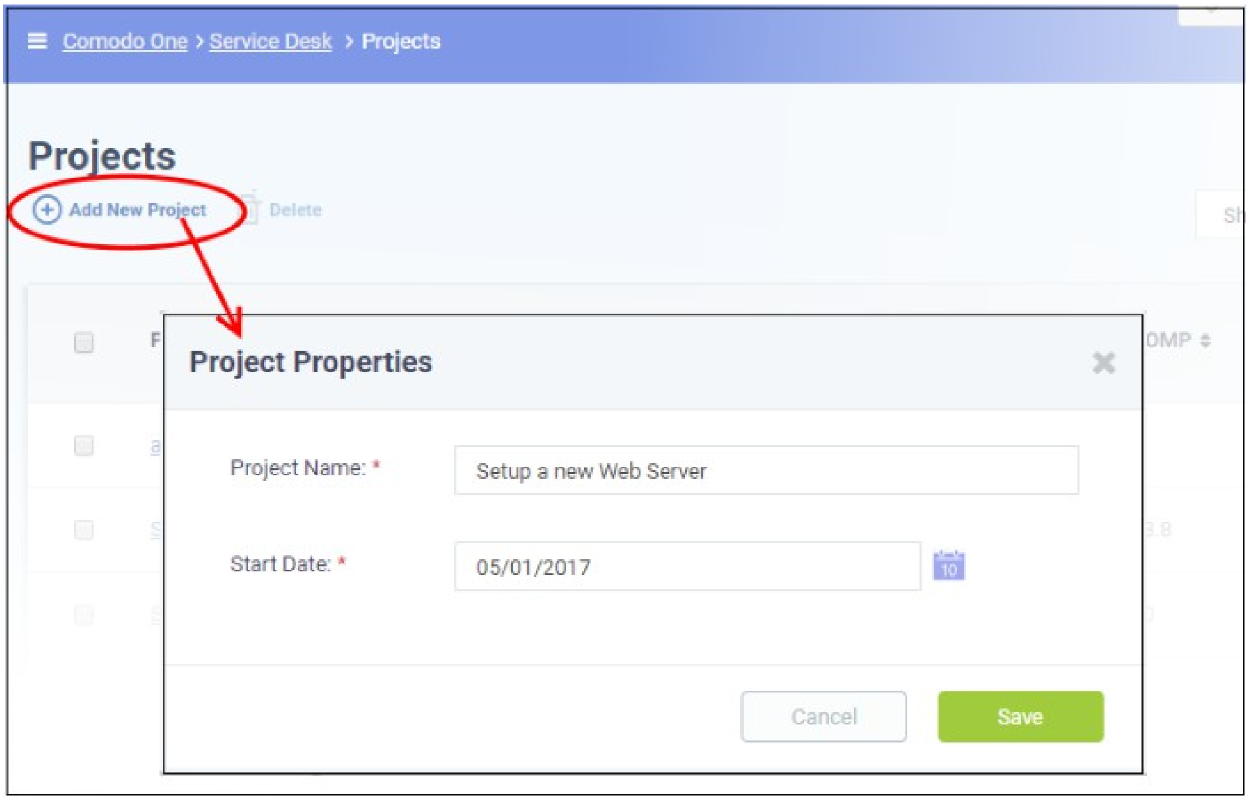
- **Create a new project and add Tasks and Sub Tasks**
- **View the project status and update it**
- **Remove a project**

Creating a new Project

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

To create a new project

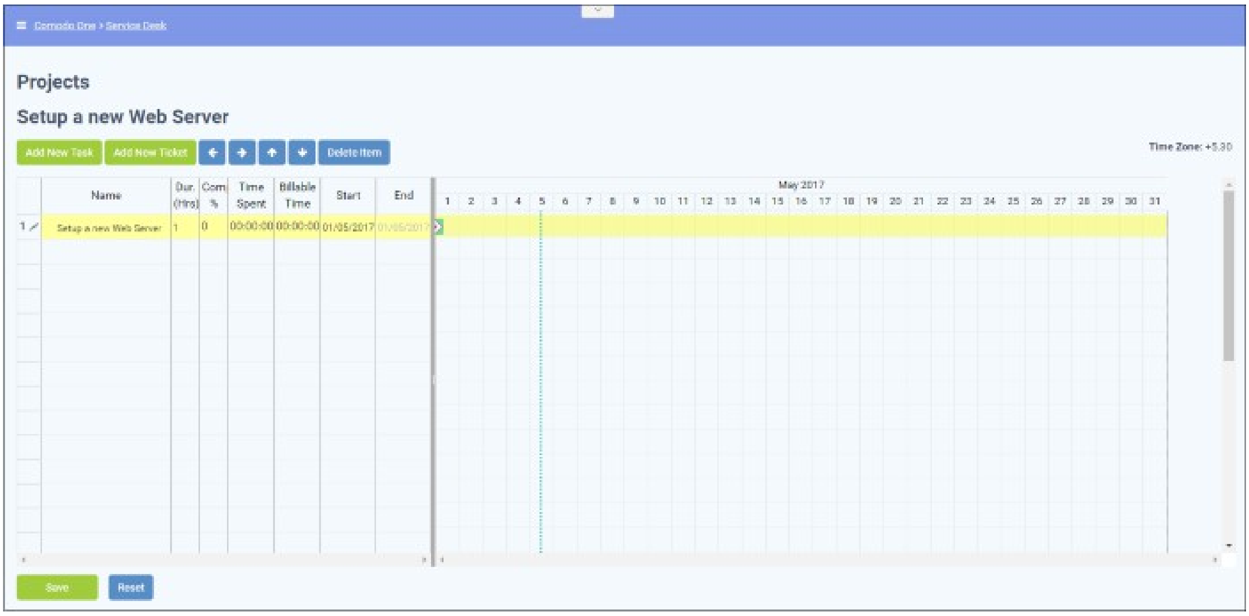
- Click 'Add New Project' from the 'Projects' interface



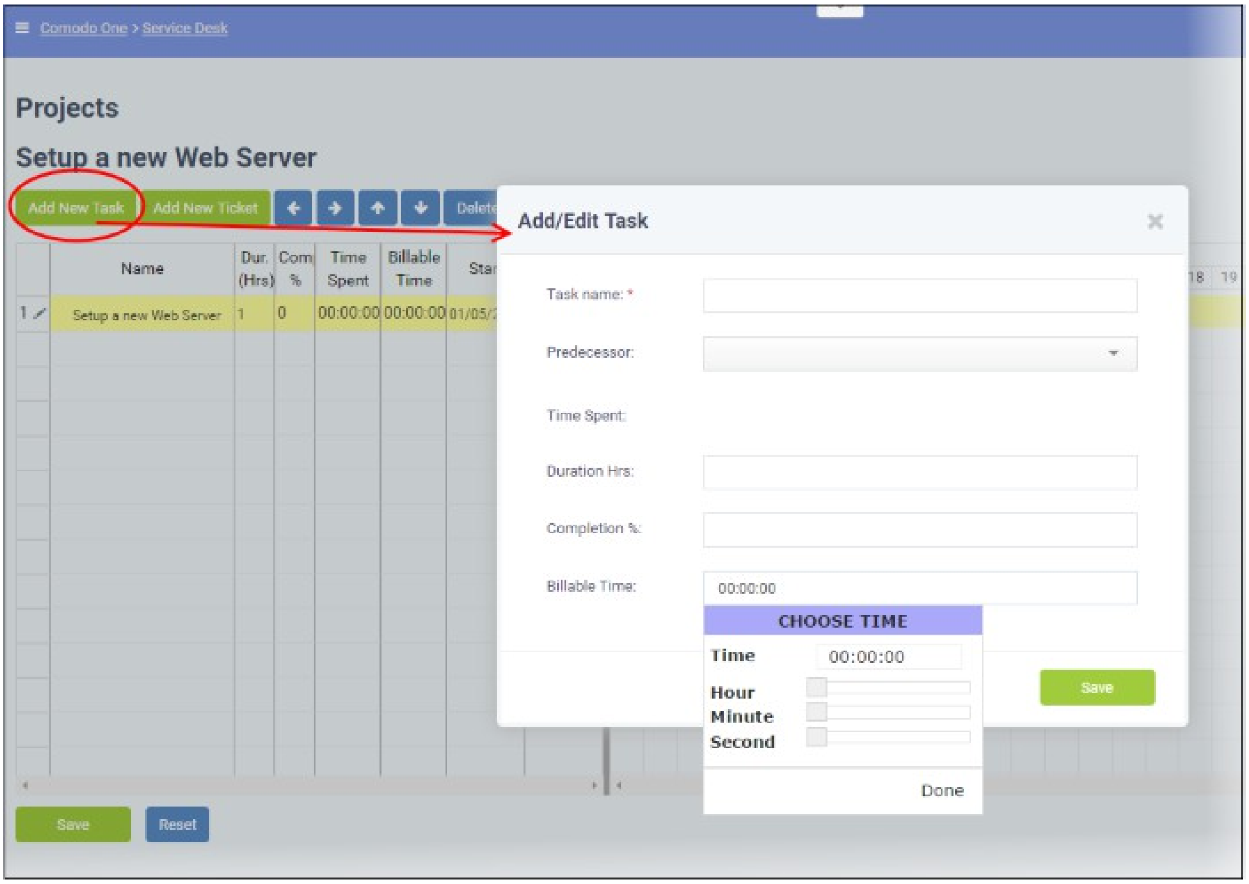
The Project Properties dialog will appear.

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

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



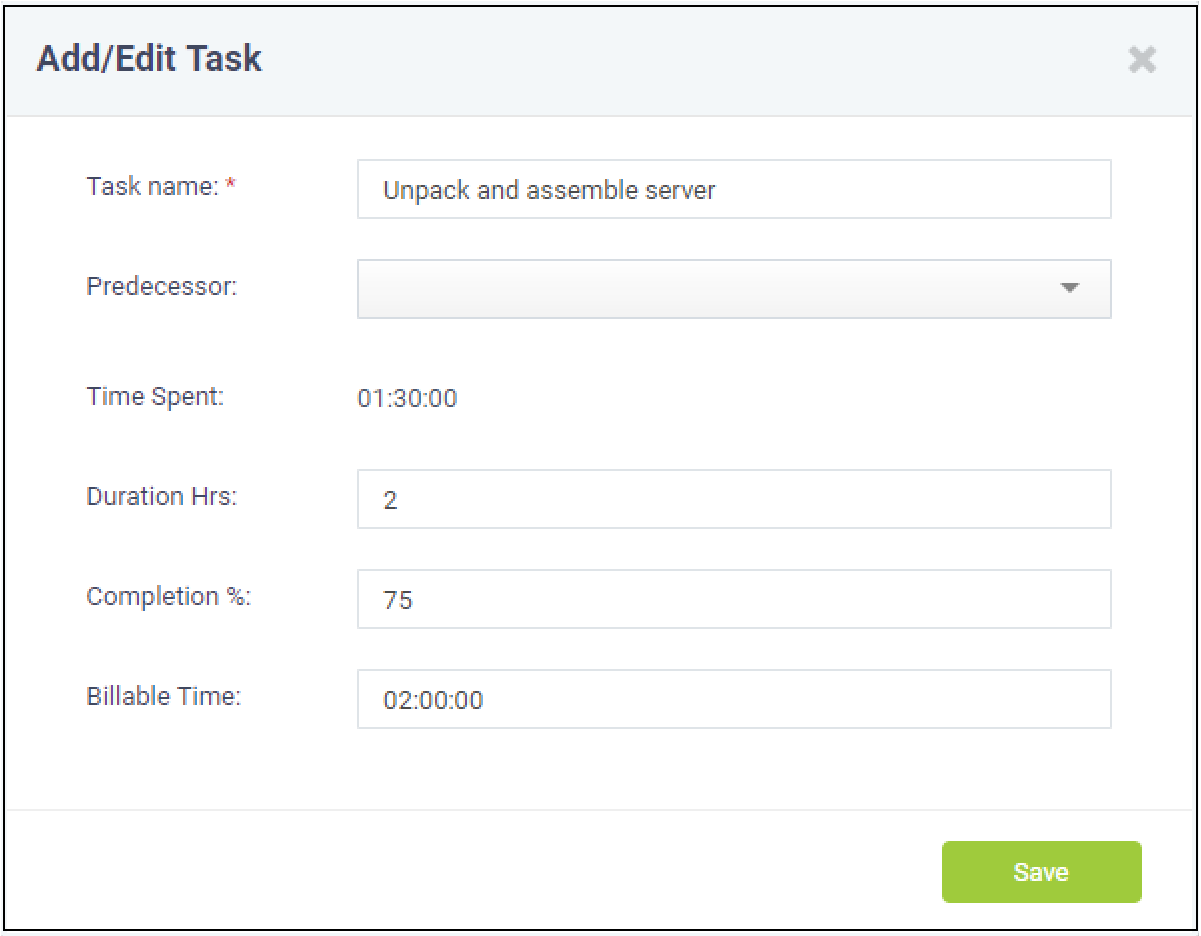
- To add a sub-task:
  - Select the root task and click the 'Add New Task' button at the top



The 'Add/Edit Task' dialog will appear.

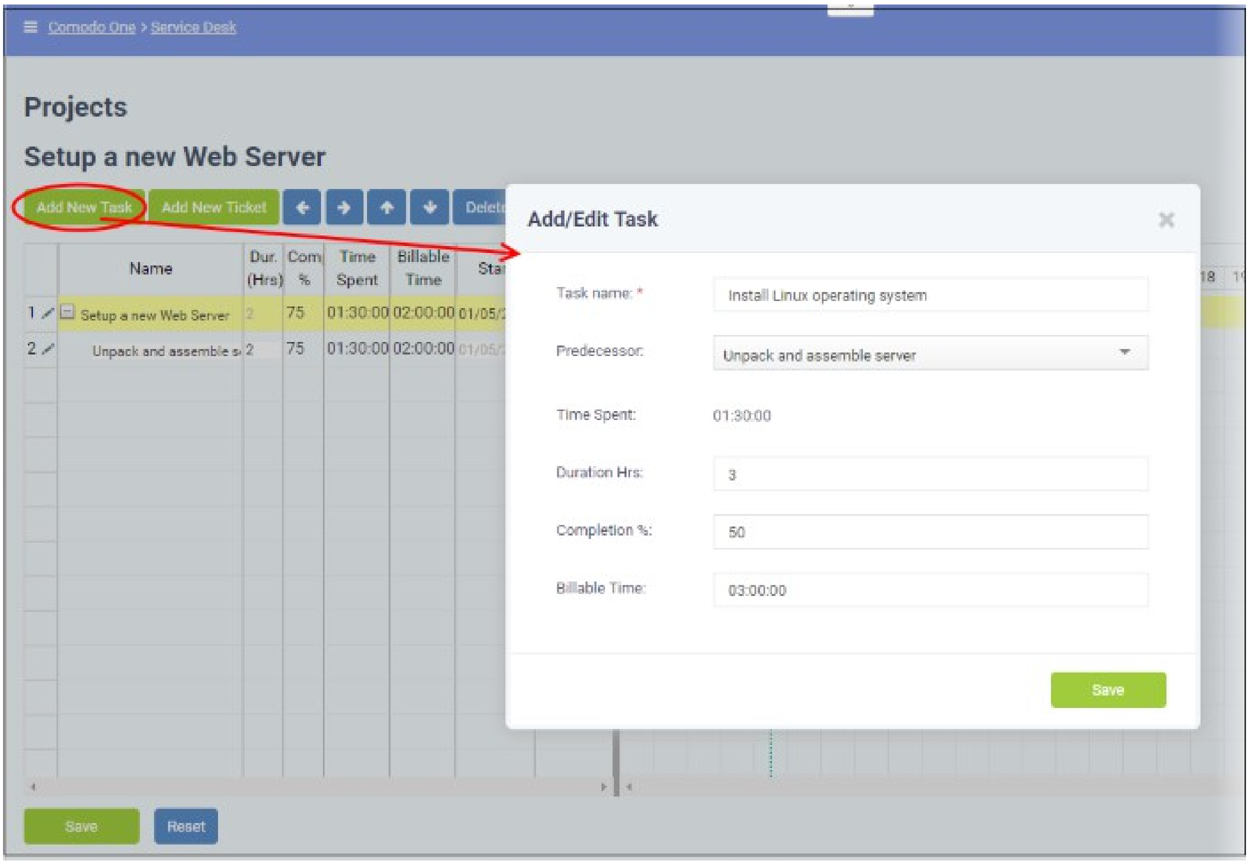
- Enter the name of the task
- Predecessor (optional). Select a task which must be completed before the new task can begin.
- Enter the time required (in hours) to complete the task in the 'Duration' field
- If the task is in-progress, enter the completion percentage in the 'Completion %' 'field

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



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

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



The 'Add/Edit Task' dialog will appear.

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

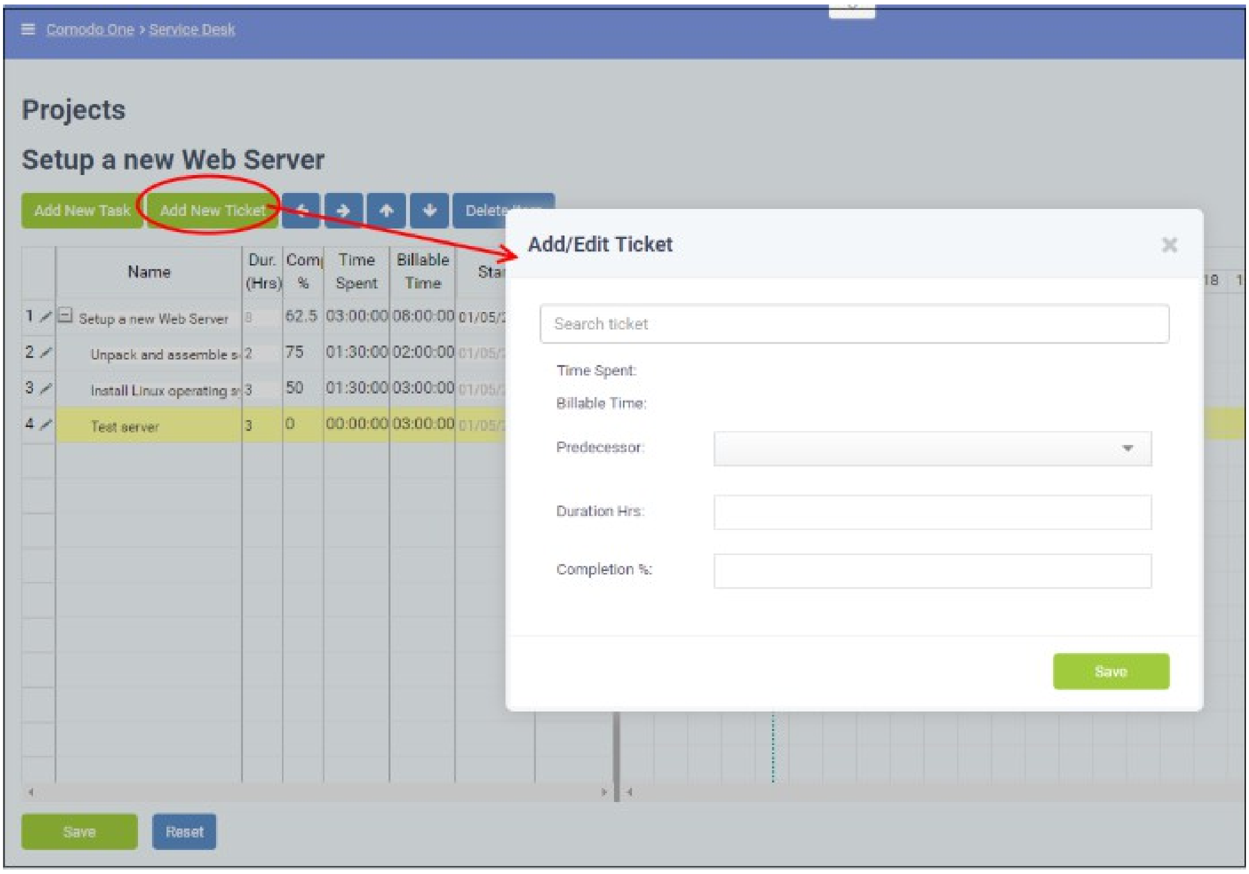
The time spent field will be automatically populated from the entered values.

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

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

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

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

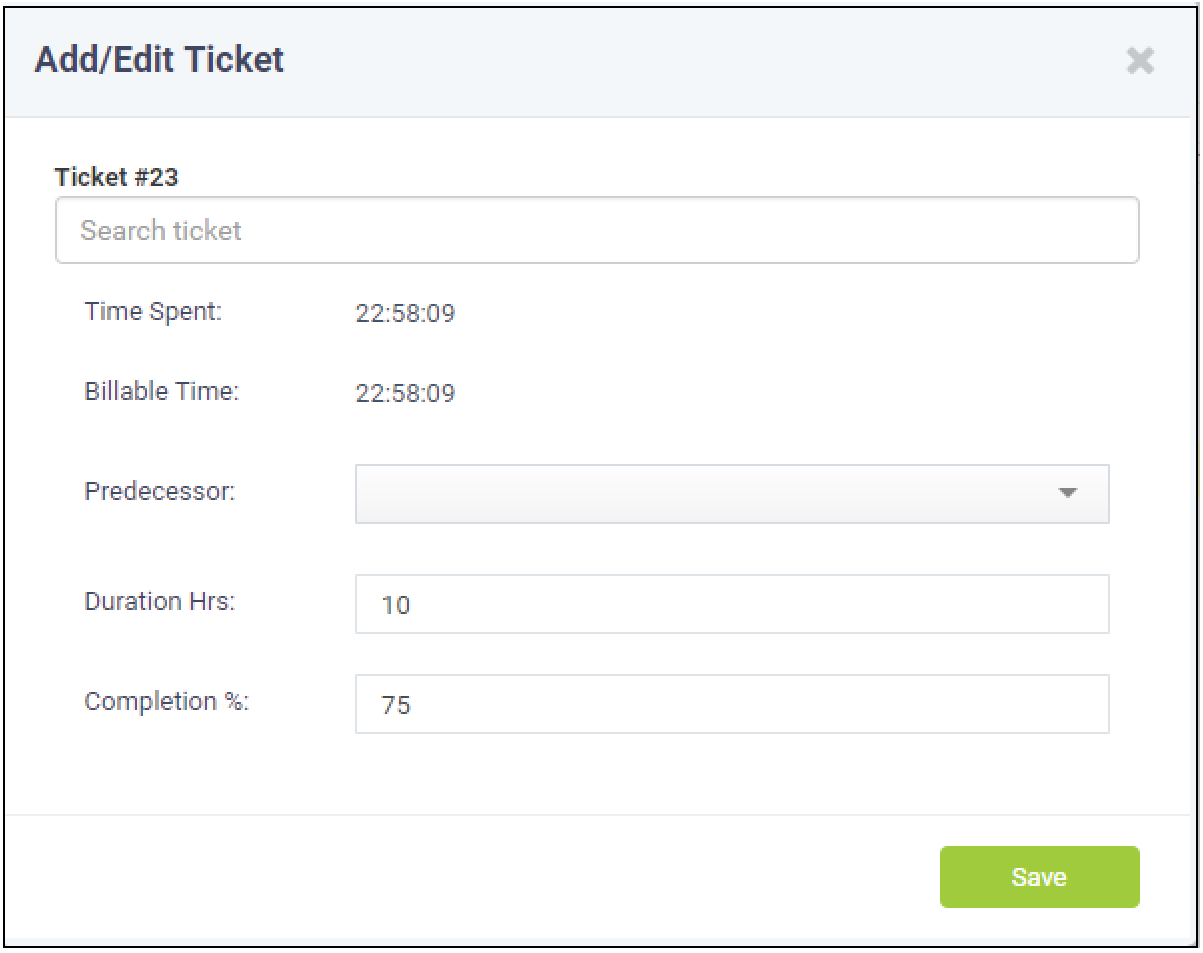


The Add/Edit ticket dialog will appear.

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

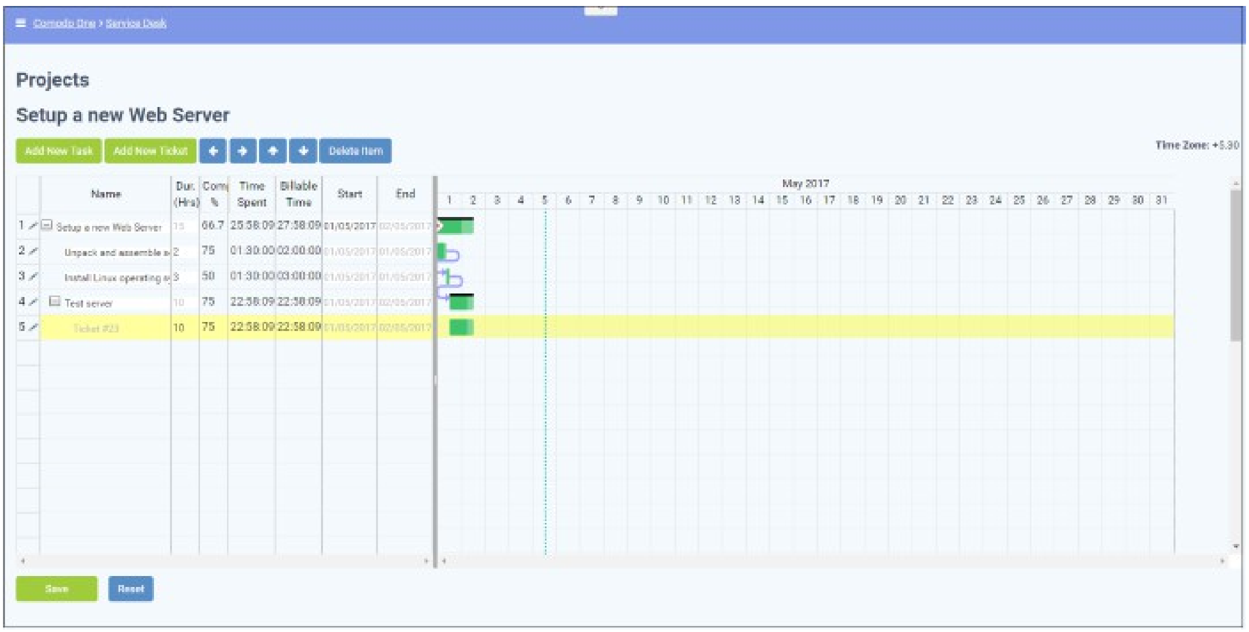
The time spent and billable time will be automatically populated for the progress of the ticket so far.

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



- Click 'Save'.

The ticket will be linked to the task.



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

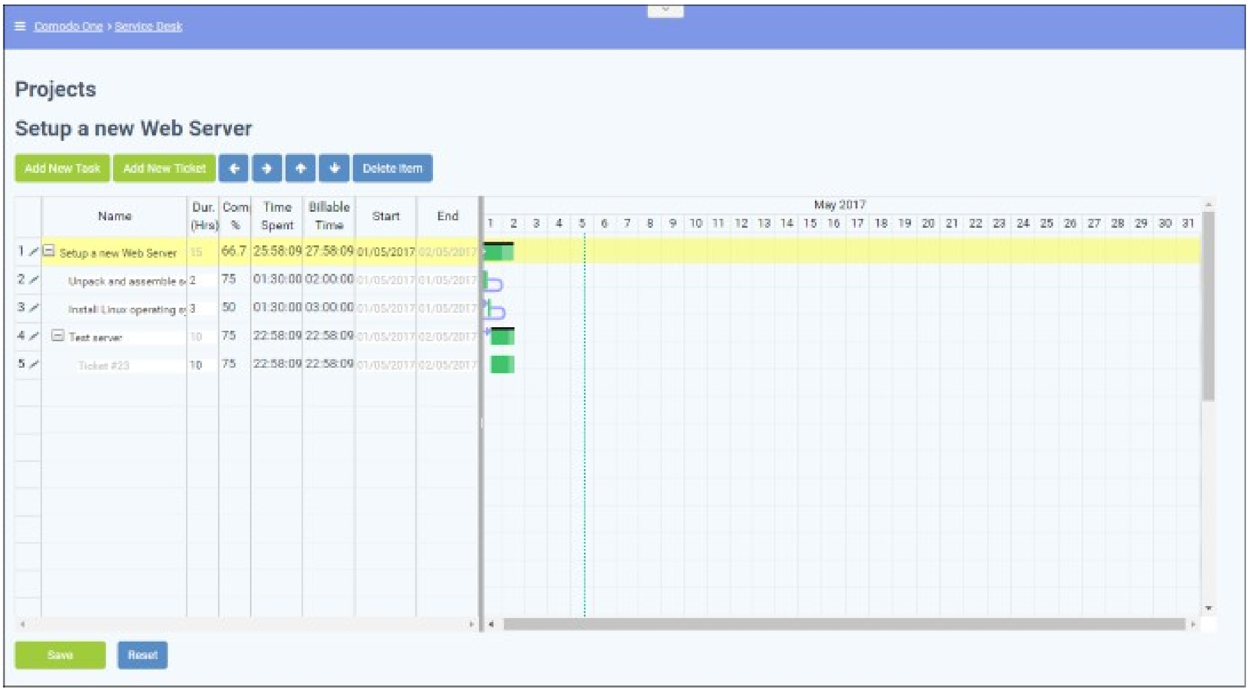
- To delete a task, sub-task, ticket or a sub-ticket, select the item and click 'Delete Item' at the top.
- Click 'Save' in the project viewer interface to save your changes.

Viewing Project Status and Updating it

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

To view a project

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



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

		status.	
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.

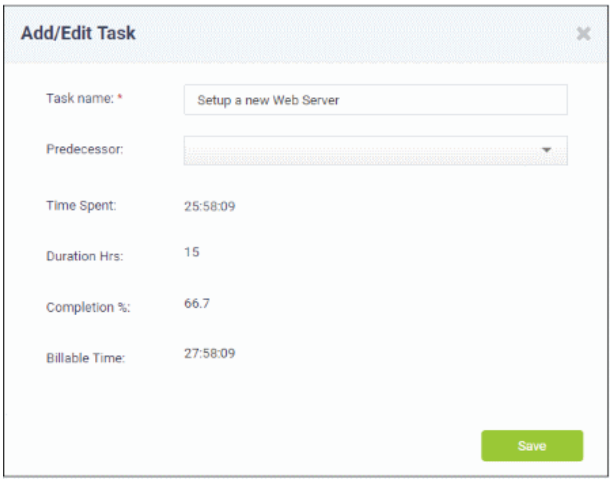
- To add a new item, click the respective button from the top right and enter the details of the item in the 'Add/Edit Task' or 'Add/Edit Ticket' dialog. For more details, see the explanation **above**.

To edit/update a task

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

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

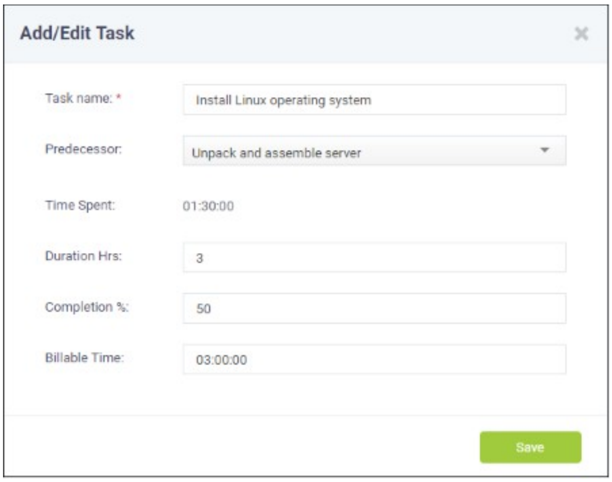
Parent Level Task



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

The 'Time Spent', 'Duration Hrs', 'Completion % ' and 'Billable Time' are automatically populated from the sums

Child Level or Terminal Task



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

of the respective values in the child tasks.

- Click 'Save' for your changes to take effect

continued.

- **Time Spent -** Displays the actual time spent based on the duration hrs and completion percentage entered.
- **Duration -** Allows you to update the time duration required (in hours) to complete the task
- **Completion % -** Allows you to update the completion percentage

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

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

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

- Click 'Save' in the 'Projects' interface

To update a ticket or a sub-ticket

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

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

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

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

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

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

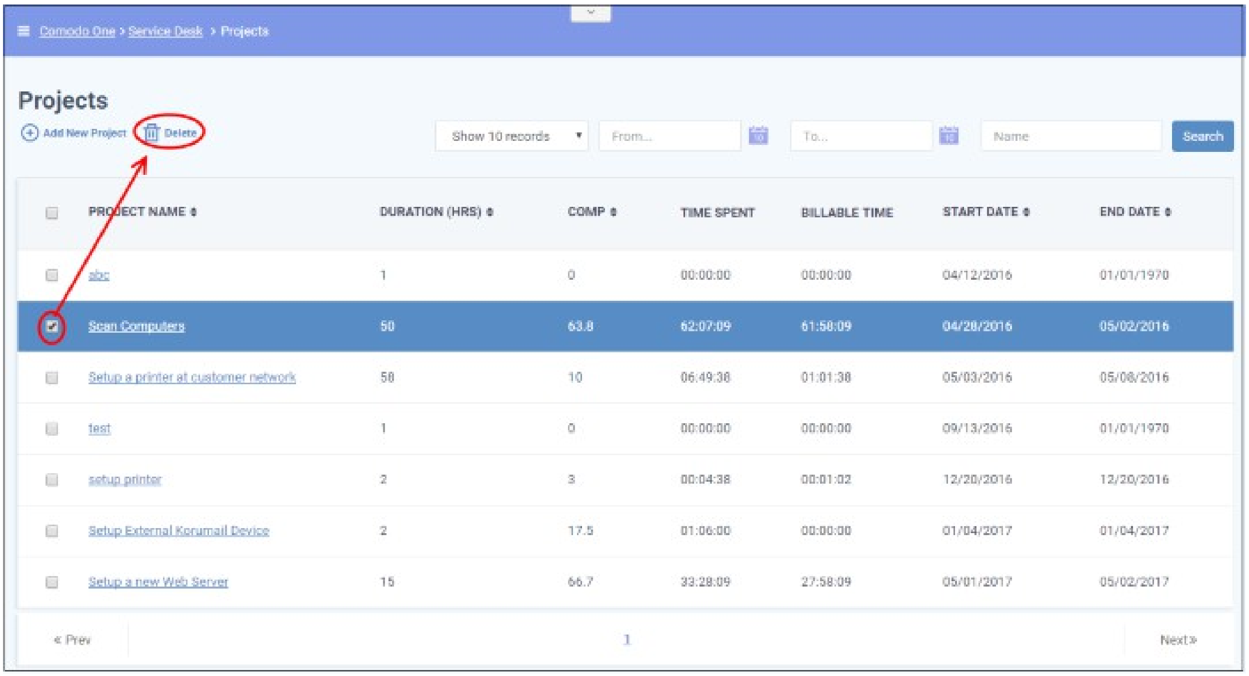
- Click 'Save' in the 'Projects' interface

Removing a Project

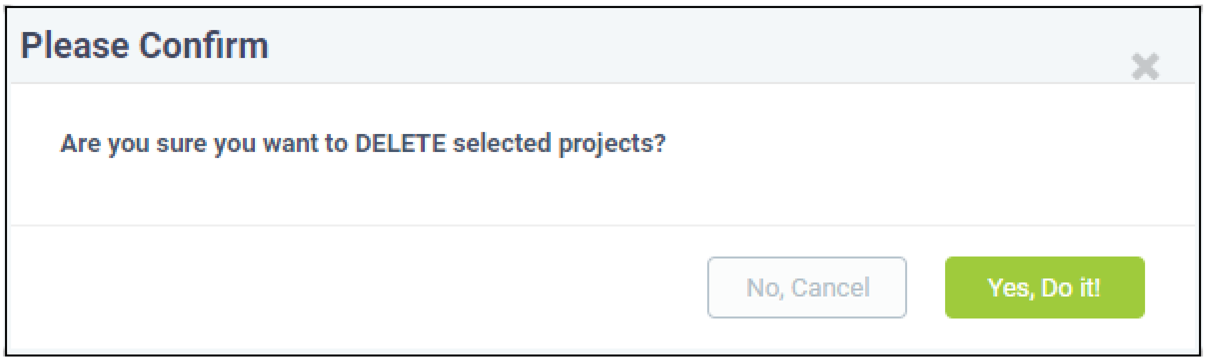
Projects that are completed or no longer required, can be removed from Service Desk.

To remove project(s)

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



A confirmation dialog will appear.



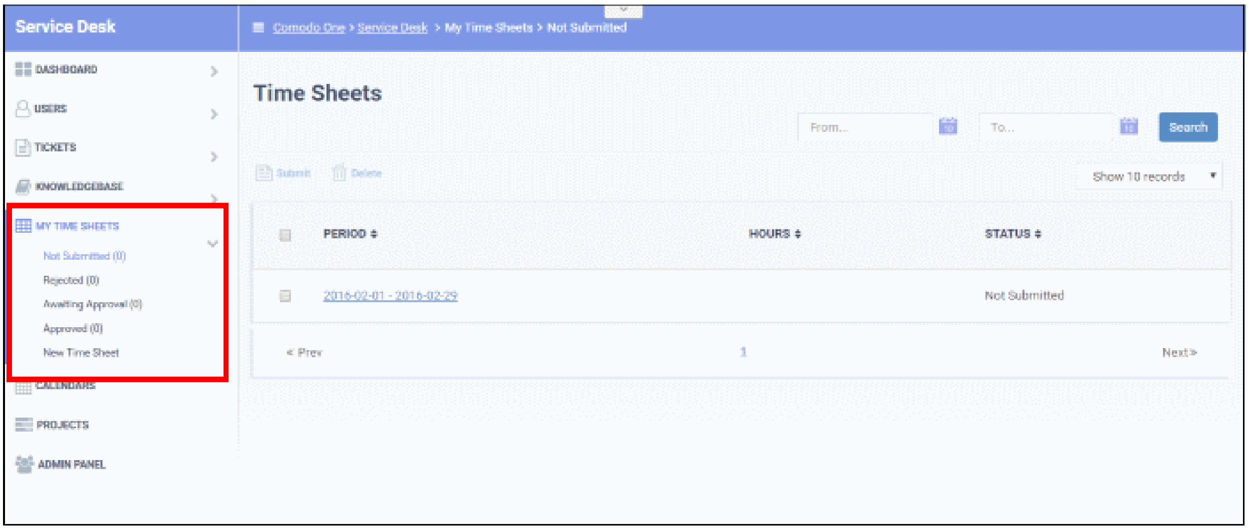
- Click 'Yes, Do it!' to remove the project

3.6 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 a 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**

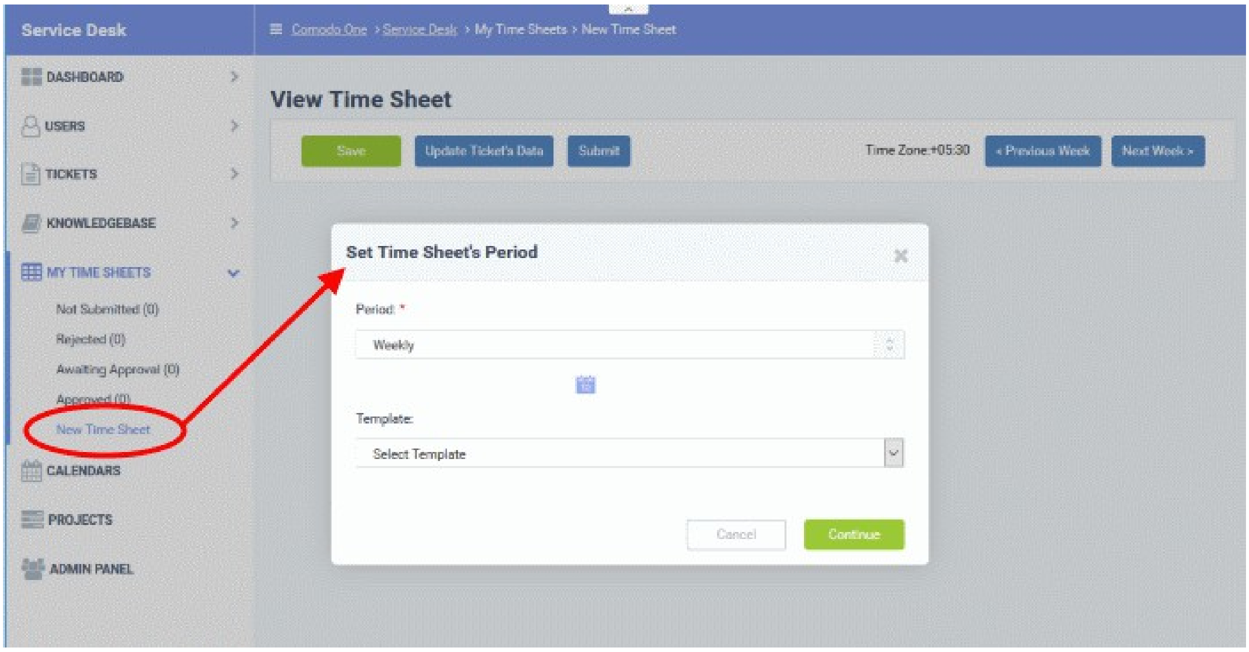
- Updating a Time Sheet
- Submitting a Time Sheet for approval
- Deleting a Time Sheet

Adding a Time Sheet

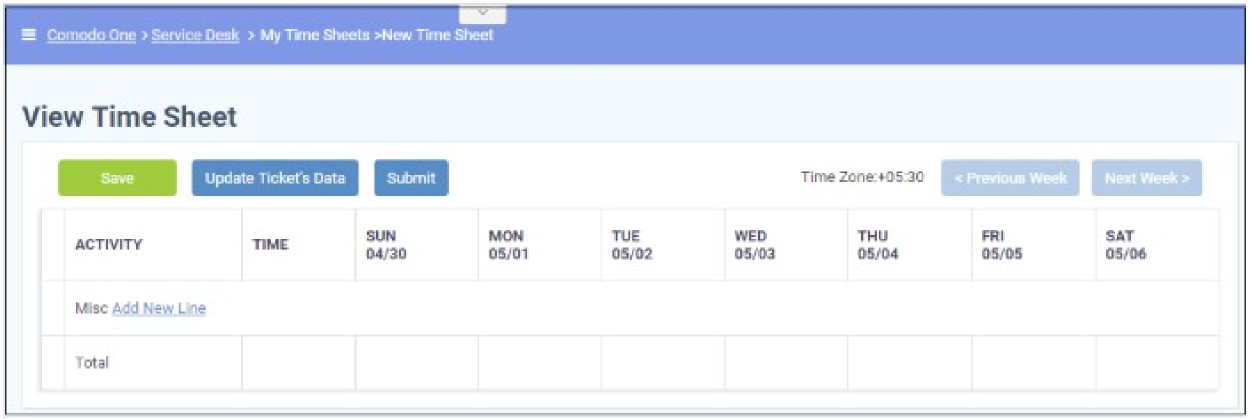
A staff member can add new time sheet by specifying the time period to be covered. Once created, staff can add tasks they have attended to and the time spent on them. The sheet can then be submitted to an administrator for approval.

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



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

Updating a Time Sheet

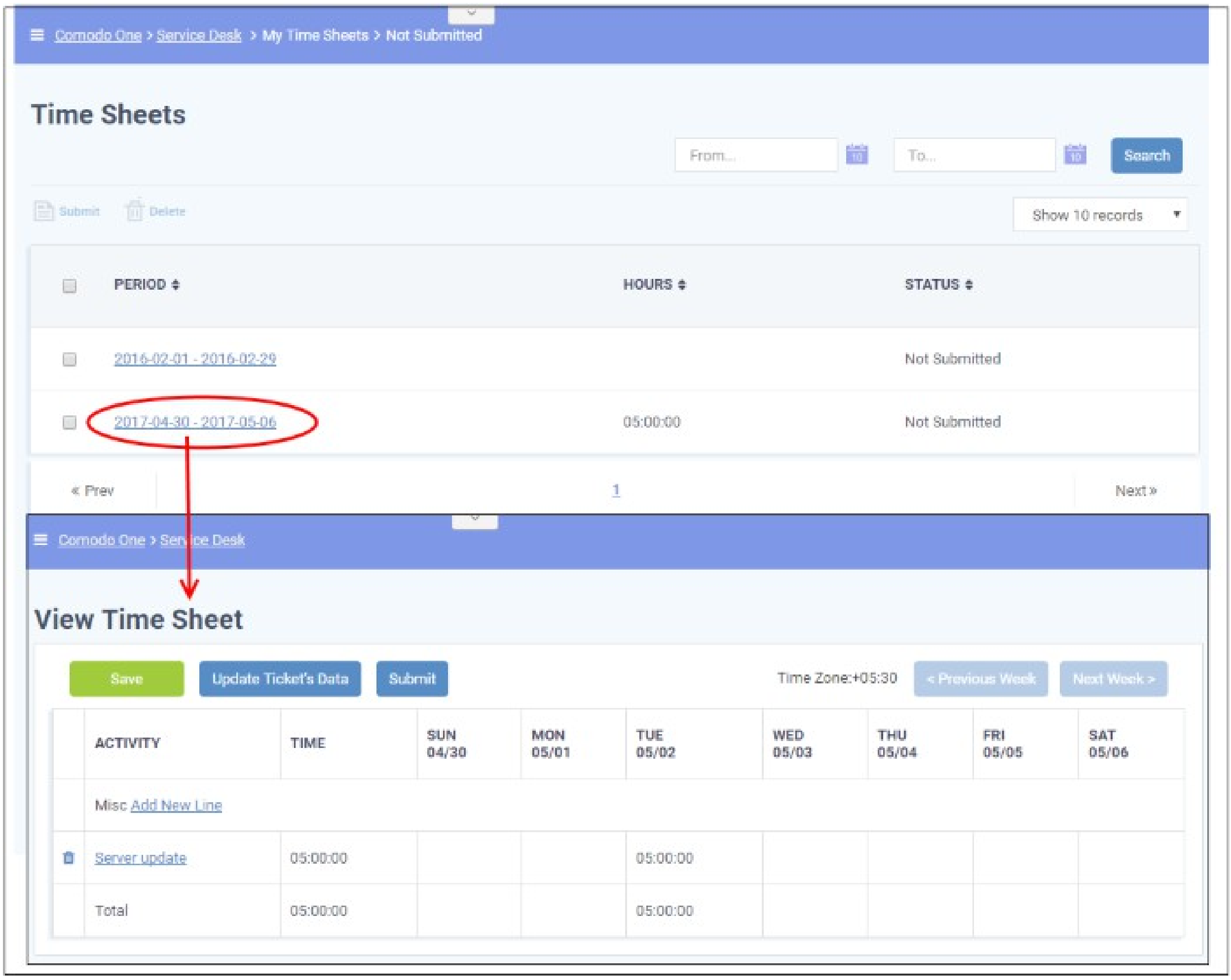
Staff can add tasks and time spent to a time-sheet in two ways:

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

To update a time sheet

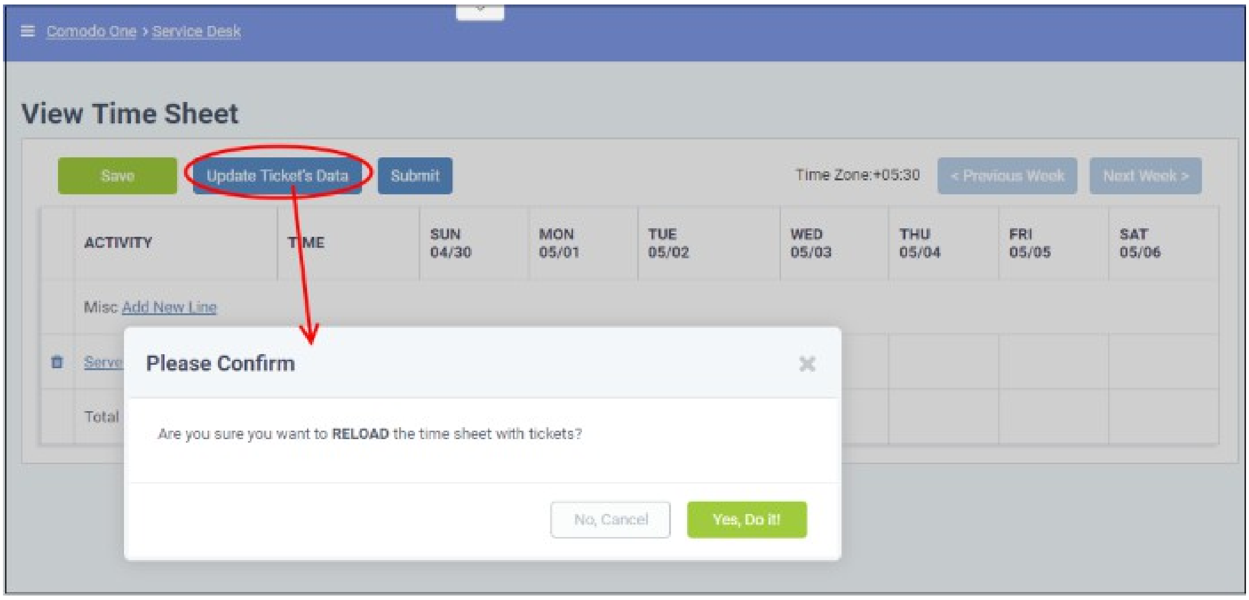
- Open the 'Time Sheets' interface by clicking 'My Time Sheets' from the Staff Panel
- Click the time sheet category to be updated

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



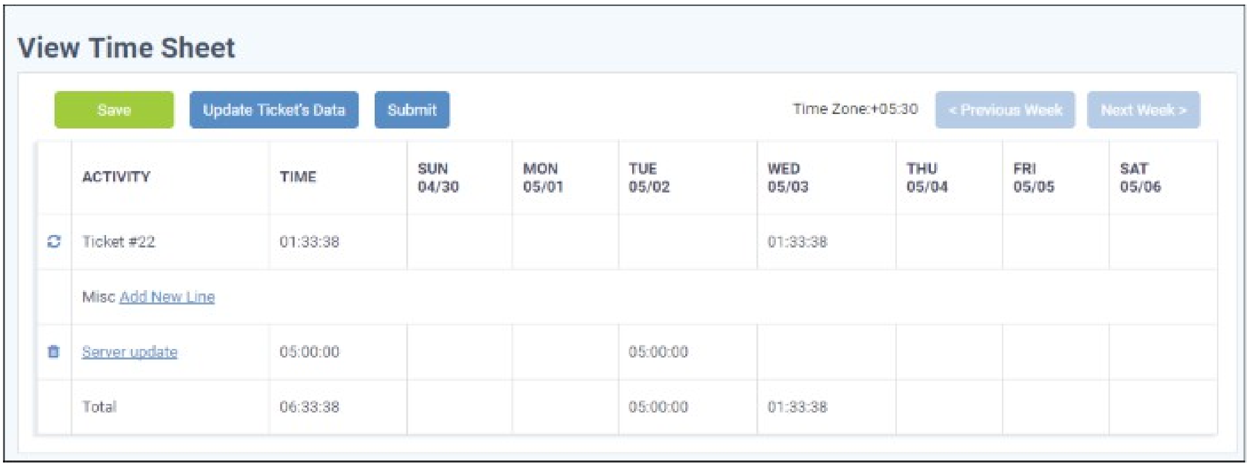
The edit time-sheet screen will open. This displays each activity on a separate row along with the total time spent on an activity and the time spent per day on an activity. The screen displays the first week within the period by default. To view details about other weeks, use the 'Previous Week' and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

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



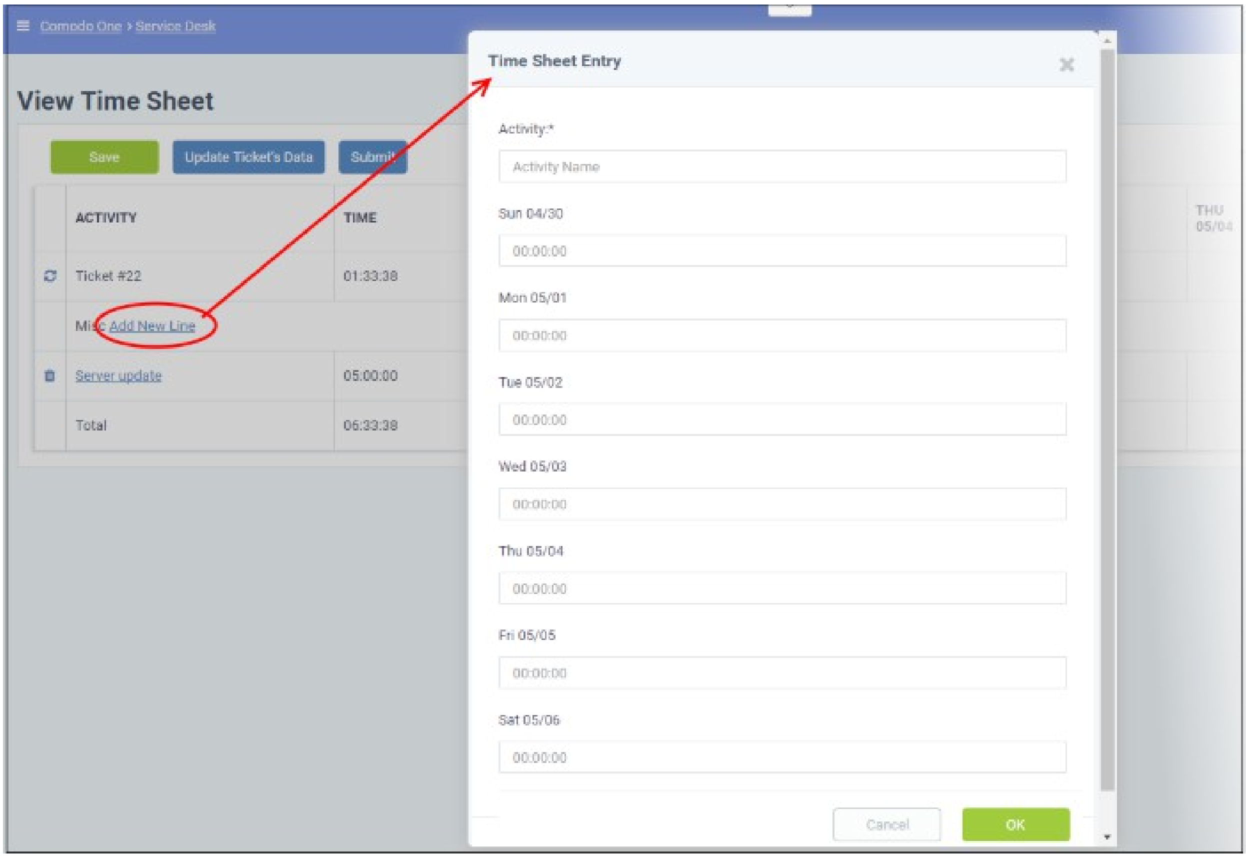
- Click 'Yes, Do it!' in the confirmation dialog

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



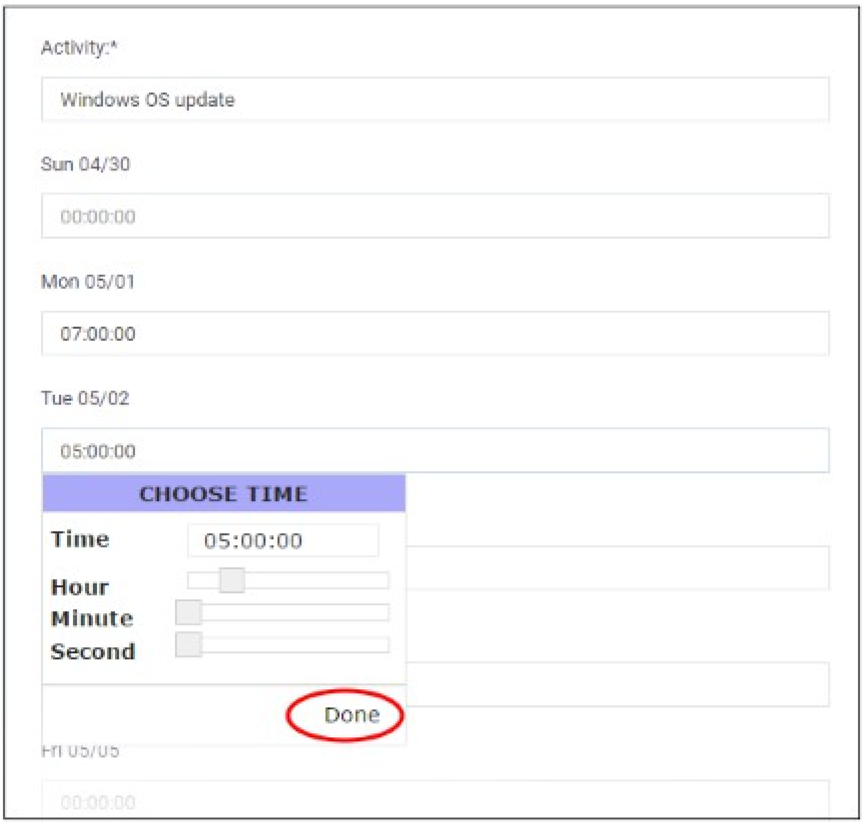
- Click Save for your changes to take effect

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



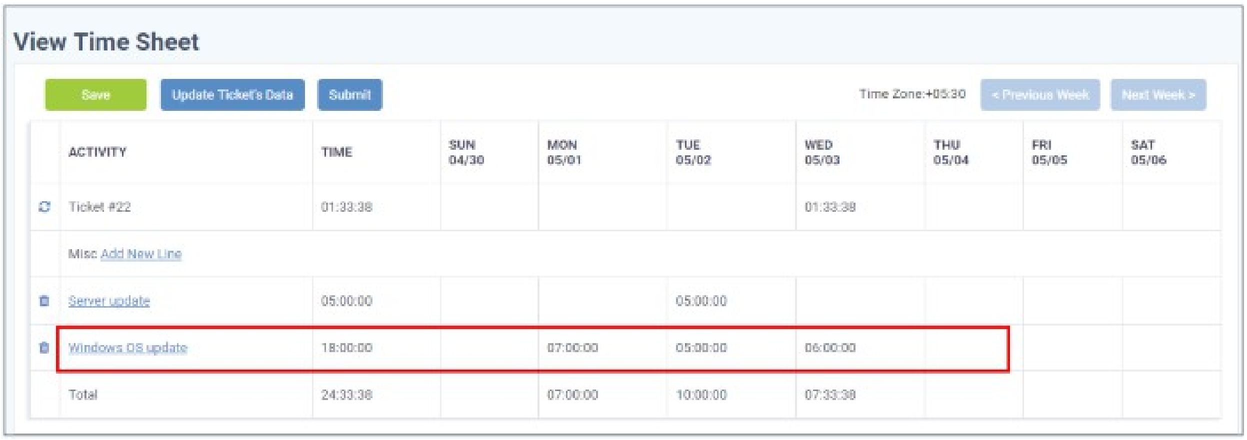
The 'Time Sheet Entry' dialog will appear.

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



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

The activity will be added to the list.



- Click 'Save' for your changes to take effect

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

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

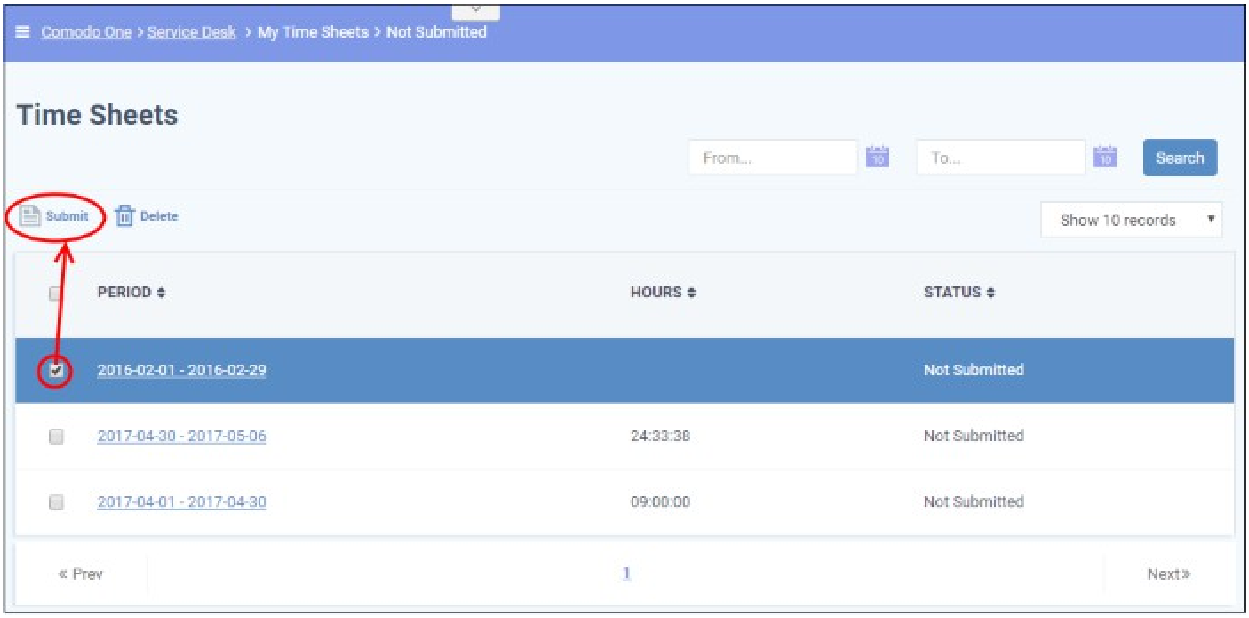
Submitting a Time Sheet for Approval

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

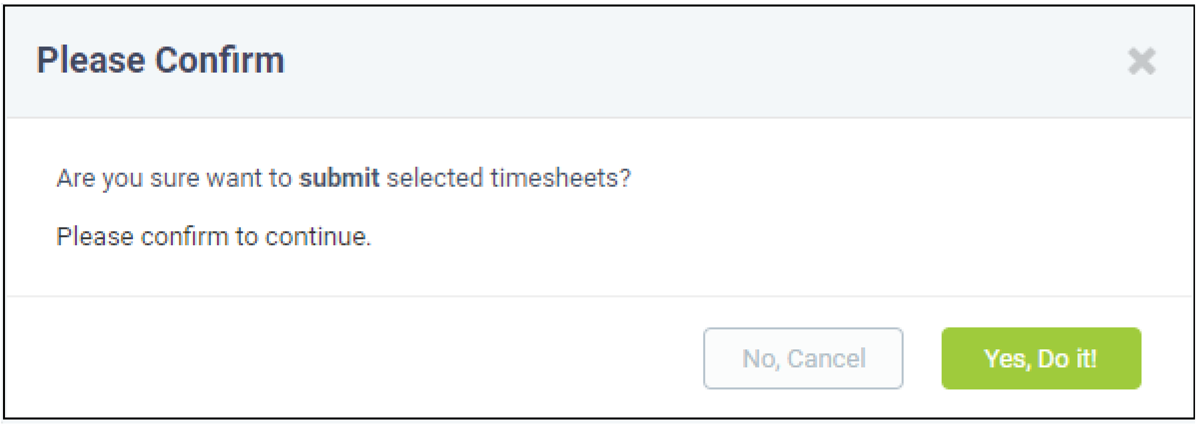
Note: Only 'Not Submitted' and 'Rejected' time sheets can be submitted for approval.

To submit time sheet(s)

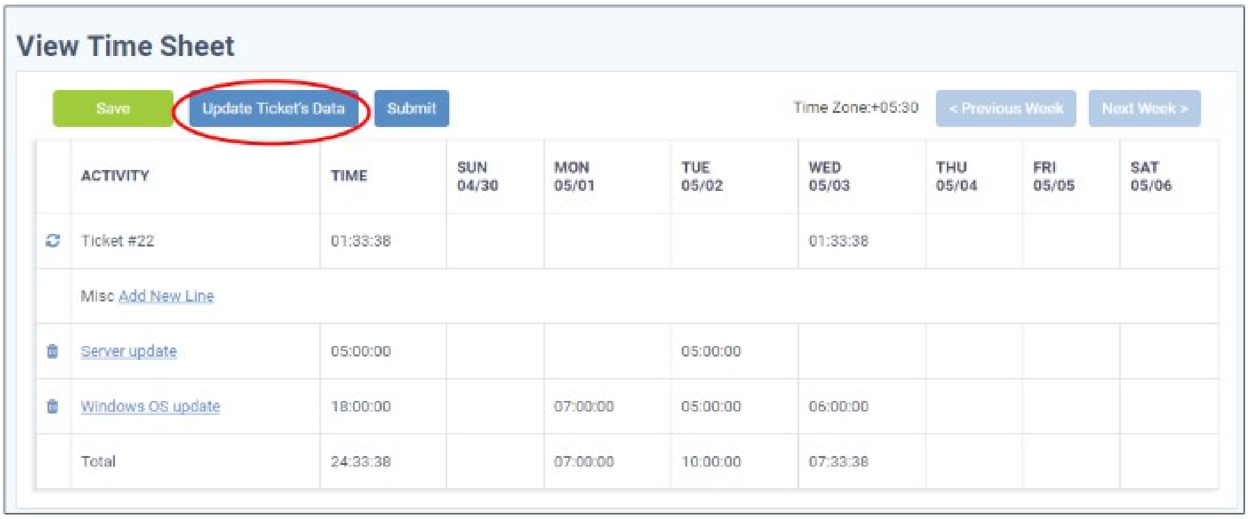
- Click 'Not Submitted' on the left under 'My Time Sheets' in the staff panel
- Select the time sheet(s) to be submitted and click 'Submit'



A confirmation dialog will appear.



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



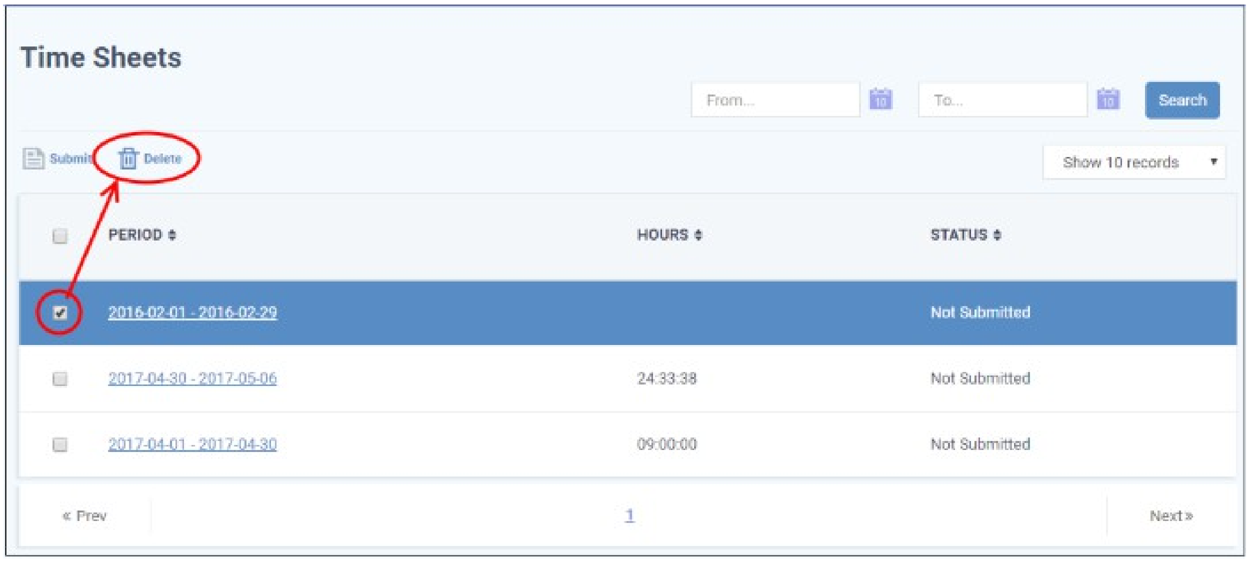
Deleting a Time Sheet

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

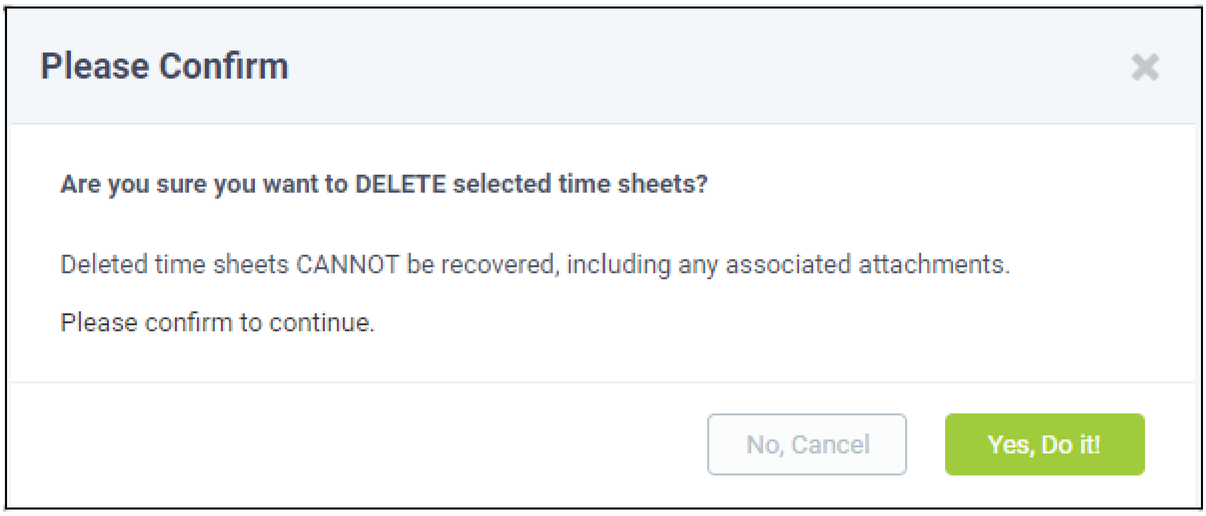
Note: Only the time sheets under Not Submitted and Rejected categories can be removed.

To remove time sheet(s)

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



A confirmation dialog will appear.



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

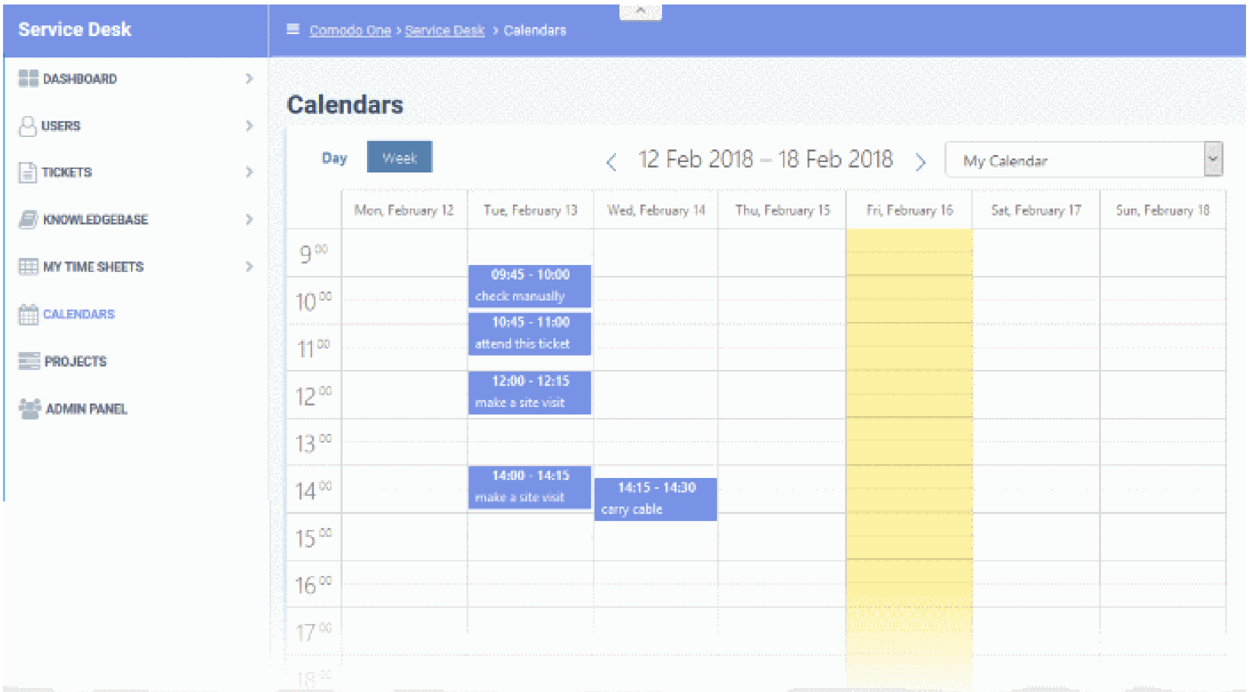
3.7 Manage Calendars

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

- There are two ways to add schedules and appointments to your calendar:
  - Manual - You can manually add an appointment to your calendar.
  - From Tickets - Schedules 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 admins/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
  - By default, the current week will be displayed. You can view the current week or day by clicking the respective button above the calendar.
  - To move to previous/next week/day, use the '<' and '>' buttons above the table.

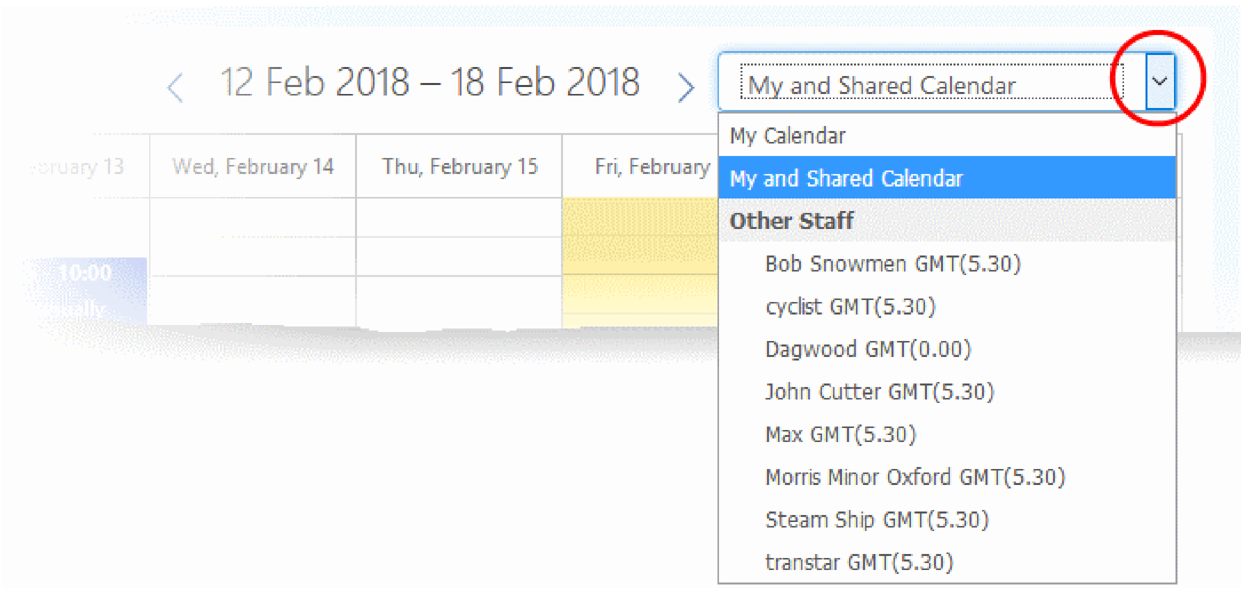


The following sections explain more about:

- **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.



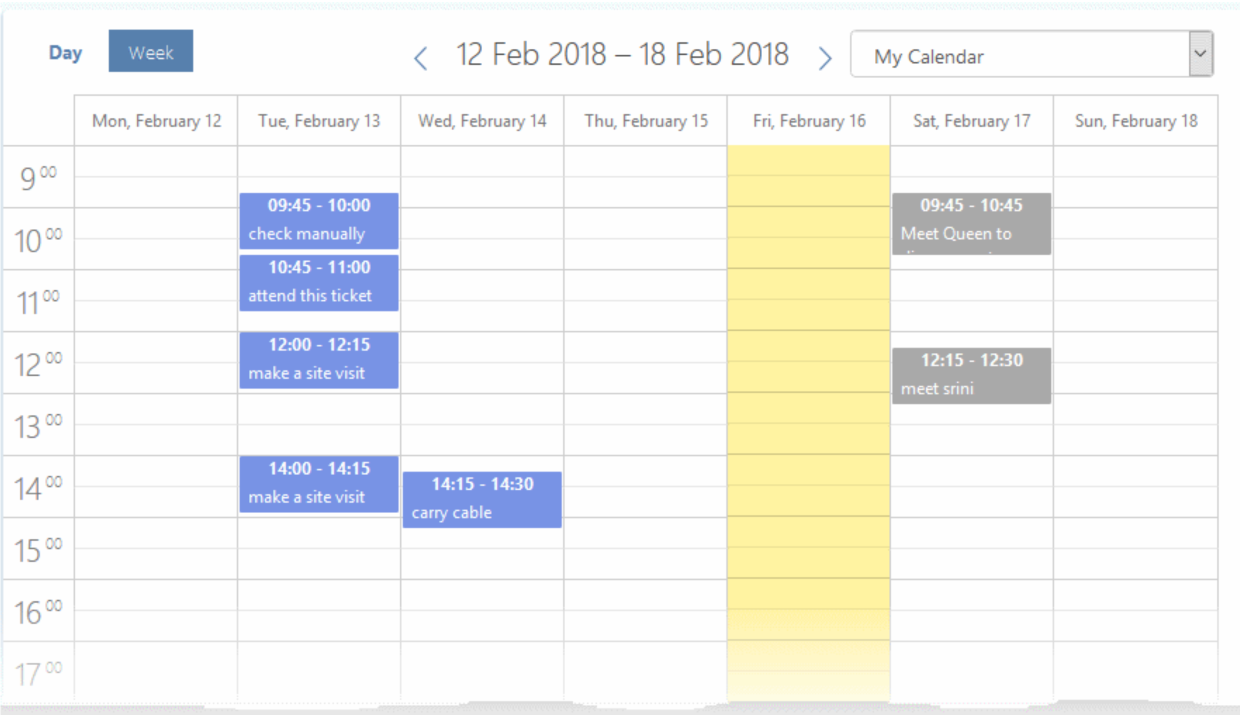
- My Calendar - Displays calendar events scheduled for you. The entries include:
  - Events manually added by you
  - Scheduled events created in tickets assigned to you
  - Events scheduled for you by admins and other staff members

- 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.

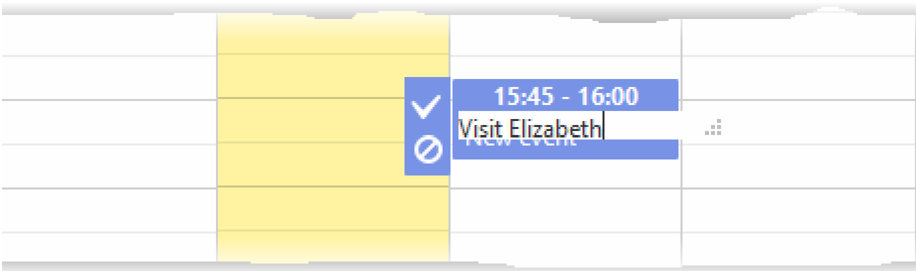
Create a Manual Calendar Entry

The 'Calendars' interface allows you to schedule events and appointments for you and other staff members.

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



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



- Enter a short description of the task
- Click the tick mark  to save the entry

To share an event with others:

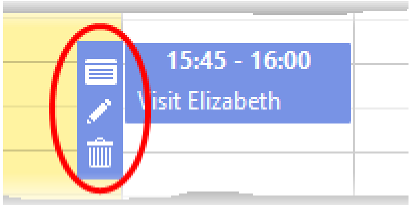
- Click on the event
- Click the 'Edit' icon that appears on the left (the top icon of the three)
- Enable the 'Shared' check-box
- Click 'Save'. See **View Details and Manage a Calendar Entry** if you need more help with this.

View Details and Manage a Calendar Entry

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

To view/manage details of a calendar entry

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



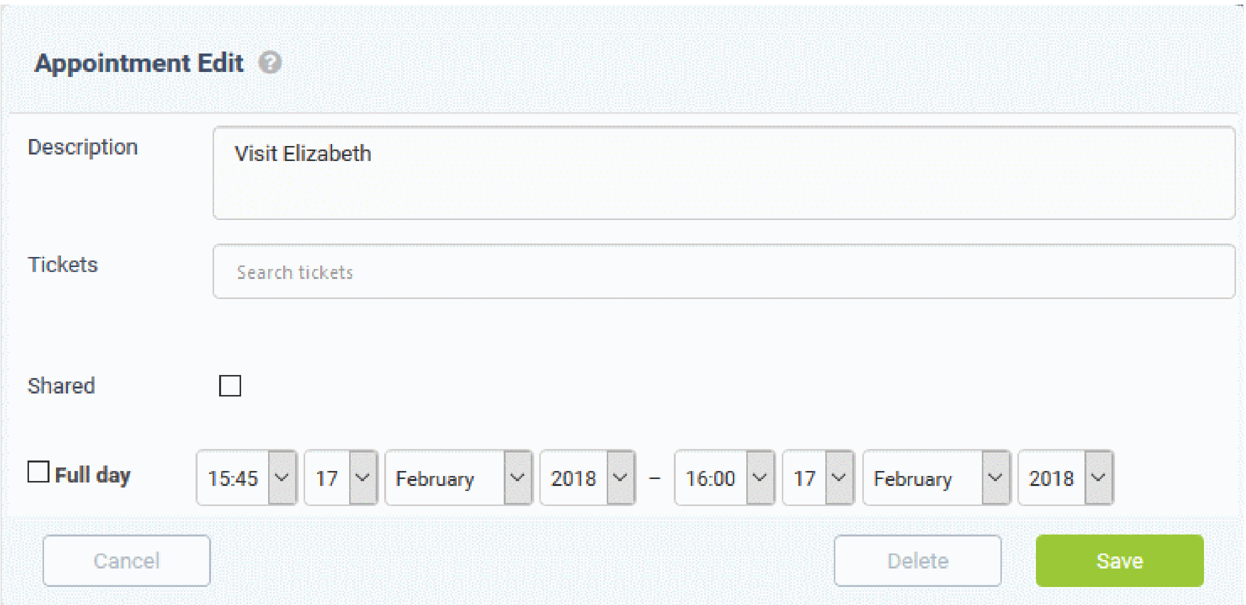
Three options will appear on the left of the entry:

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

Edit details of the calendar entry

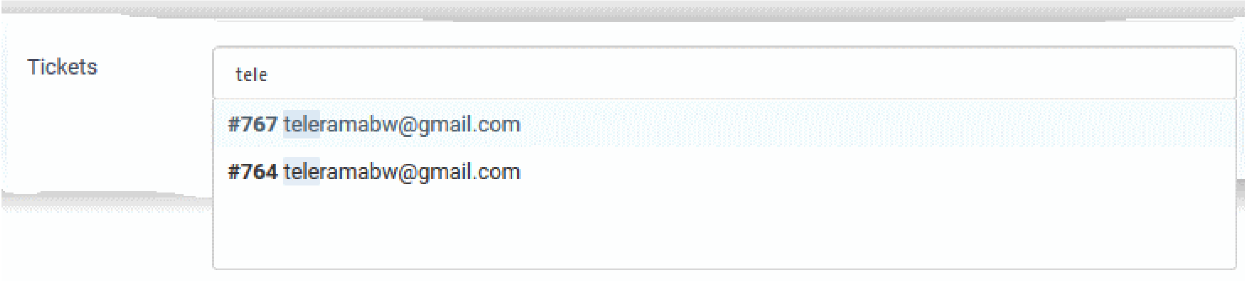
- Click the 'Details' icon to view and manage details of the ticket.

The 'Appointment Edit' dialog will appear:



- Description - The description of 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

Appendix 1 - Field Types in Custom Forms and Custom Lists

Field Type	How the field will be displayed in the target form
Short Answer	Single line text box
Long Answer	Multi line text box
Date and Time	Displays date field with calendar icon to choose a date. If configured for time, displays a drop-down that shows time at intervals of 15 minutes, for the user to choose the time.
Phone number	Displays single line text field for entering phone number. If configured, shows an additional box for 'Extension' number
Check box	Displays a checkbox for the field.
Choices	Displays a drop-down for the user to choose an option. The options to be shown are to be configured from the 'Forms' interface. Example: Field Label = Mode of Service Options = Site Visit, Remote Access 'Choices' is an alternative to ' Custom Lists'. Choices can be used to create an ad-hc drop-down for a form, rather than creating a custom list under the 'Lists' interface and choosing it for the field in a custom form.
Section Break	Allows us to insert a break in the form between sections in a single form.
Built-in lists	Displays a drop-down menu with options defined in the selected built-in list
Custom Lists	Displays a drop-down menu with options defined in the custom list

Appendix 2 - Ticket Priorities

The priority levels you assign to a ticket are at your discretion. However, here are some general definitions which may help you to decide priorities within your setup:

- Low - Customer is not experiencing loss of functionality or system errors. For example, these may be general use questions, suggestions or future enhancement requests.
- Normal - Customer has loss of non-critical functionality. Customer can function and there are workarounds available. Customer issue may even be covered by existing documentation.
- High - Customer product/service is functioning in severely reduced capacity. Significant impact to the customer's operating and productivity. Potential loss of data or interruption of service.
- Critical - Customer product/service is completely down or not functioning. Customer has experienced loss of production data and no workaround is possible.

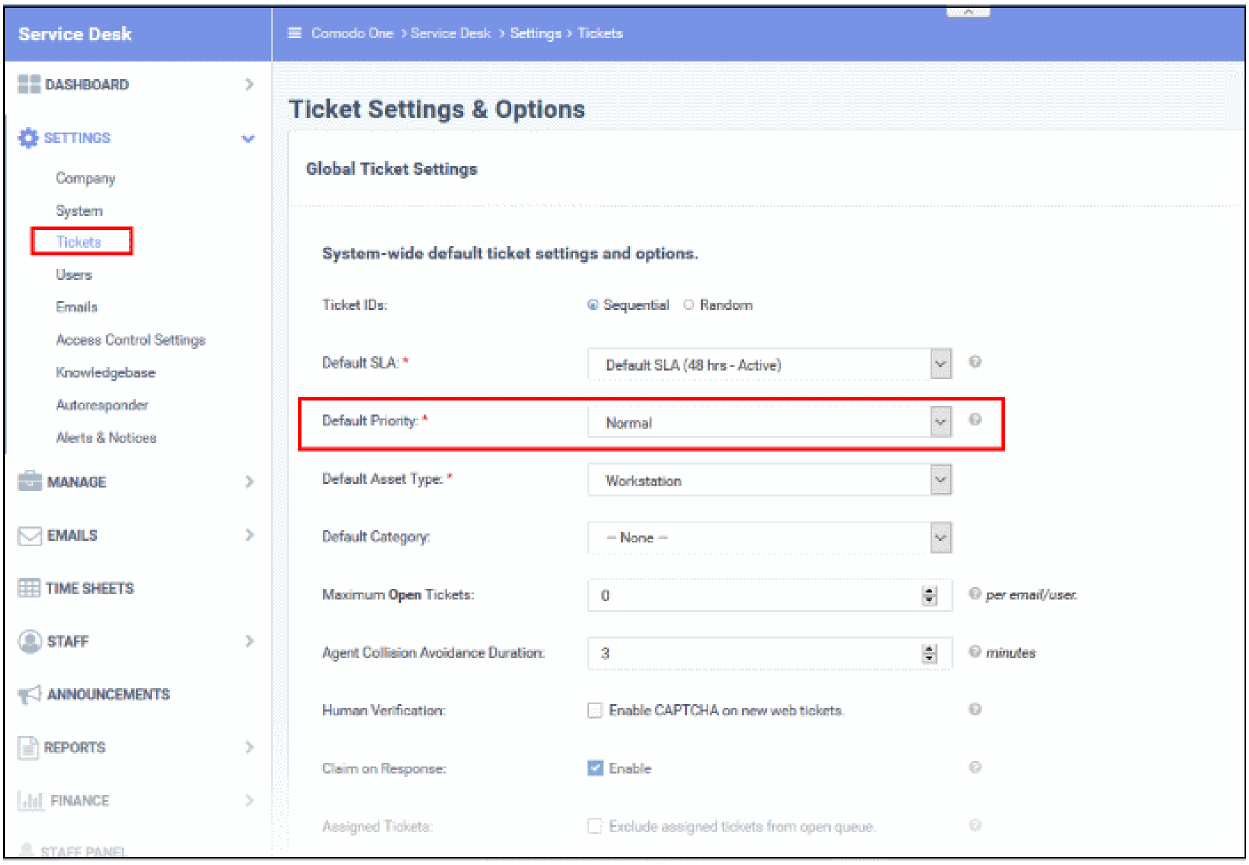
In the examples above, ticket priorities are determined by the severity of the customer's issue. As a company, however, the priority you assign to a particular ticket may also be influenced by other factors, including the importance of the customer or whether the ticket is badly overdue.

Under default settings in Service Desk, all new tickets have a priority level of 'Normal'. There are a variety of ways to set ticket priority in Service Desk. You can also use priorities as a management tool by creating filters which apply actions to tickets with a certain priority level.

The following sections show you the various places where you can set ticket priority in Service Desk. Please note, you should be in the 'Admin' panel to configure most of these settings.

- **Set default priority**
- **Assign ticket priority based on ticket category**
- **Apply actions based on ticket priority**
- **Set the priority of tickets sent to a specific email address**
- **Manually set ticket priority**

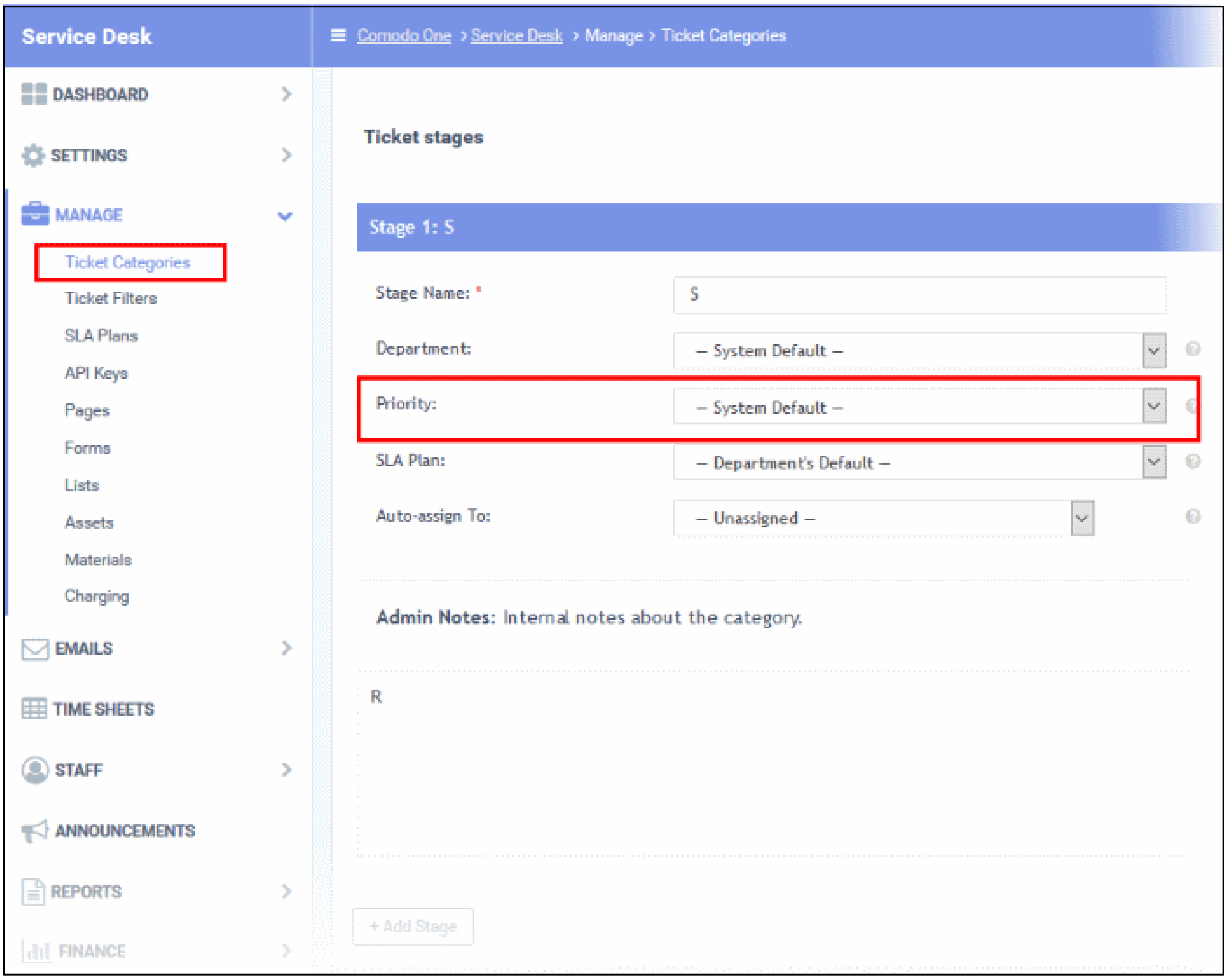
First, you can set default ticket priority in 'Settings' > 'Tickets':



The priority you assign here will be applied system-wide to new tickets. The default priority can be superseded by settings you make in other areas of the interface.

For example, you may want to assign a specific priority to tickets created after a customer picks a certain ticket category on your support portal. You can also, independently, choose the priority of tickets sent to your support email address. Your staff can, of course, manually change the priority of a ticket after they have evaluated the issue.

Secondly, you can specify the priority of tickets in ticket category stages. You can set the priority of tickets created when customers choose a specific ticket category on your support website.

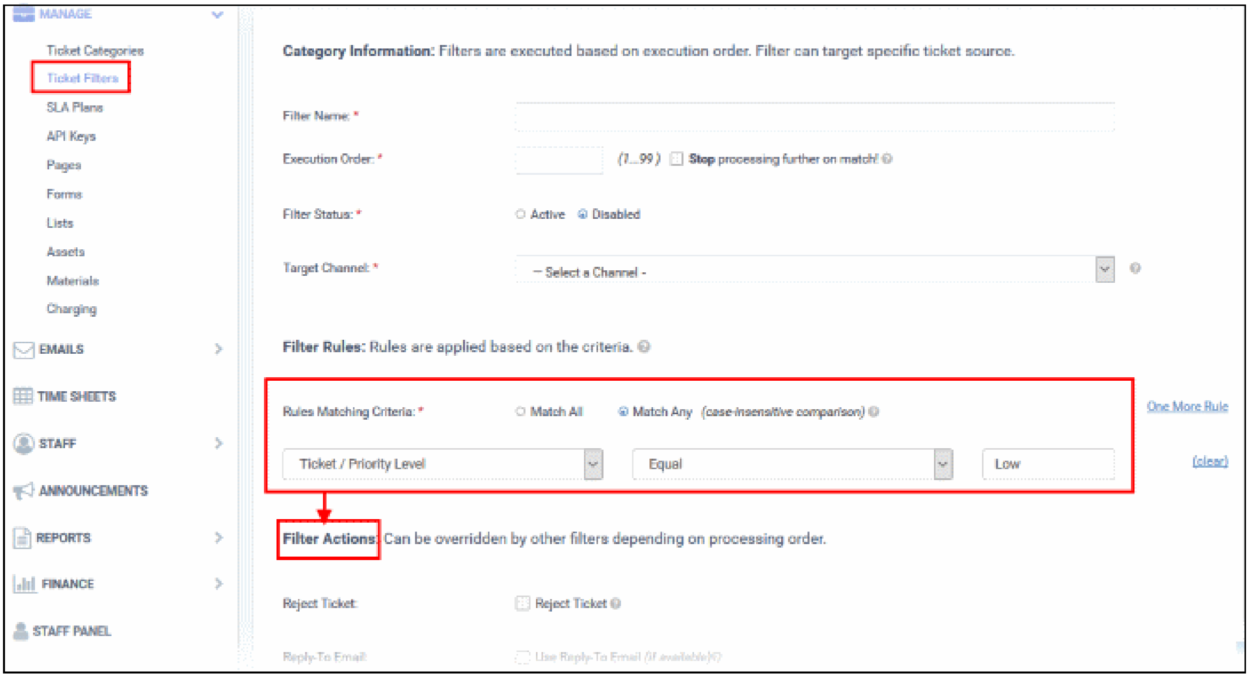


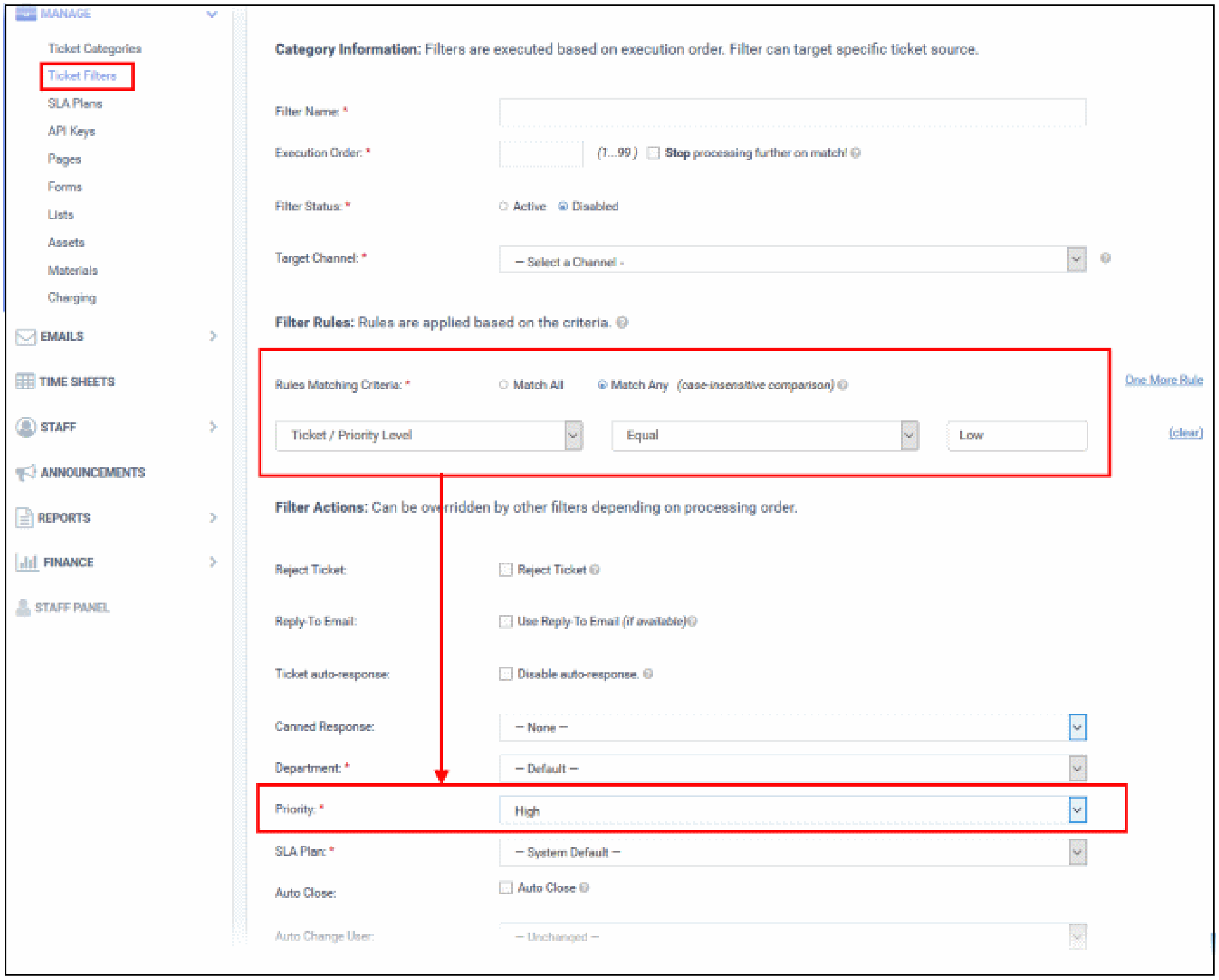
Thirdly, you can create rules in the 'Filters' section which:

- Apply actions to tickets based on their priority

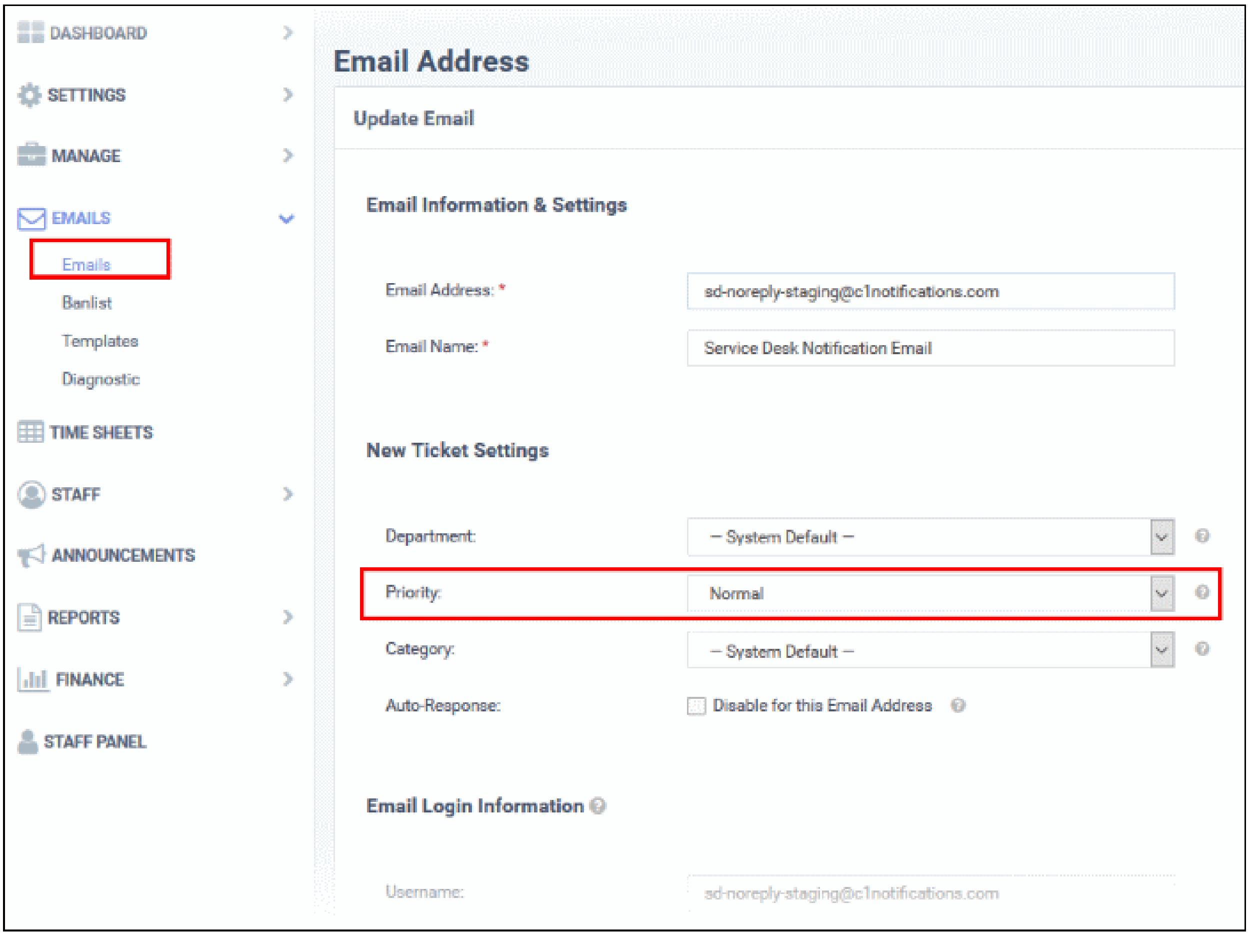
  AND/OR

- Apply priority to tickets which meet certain criteria

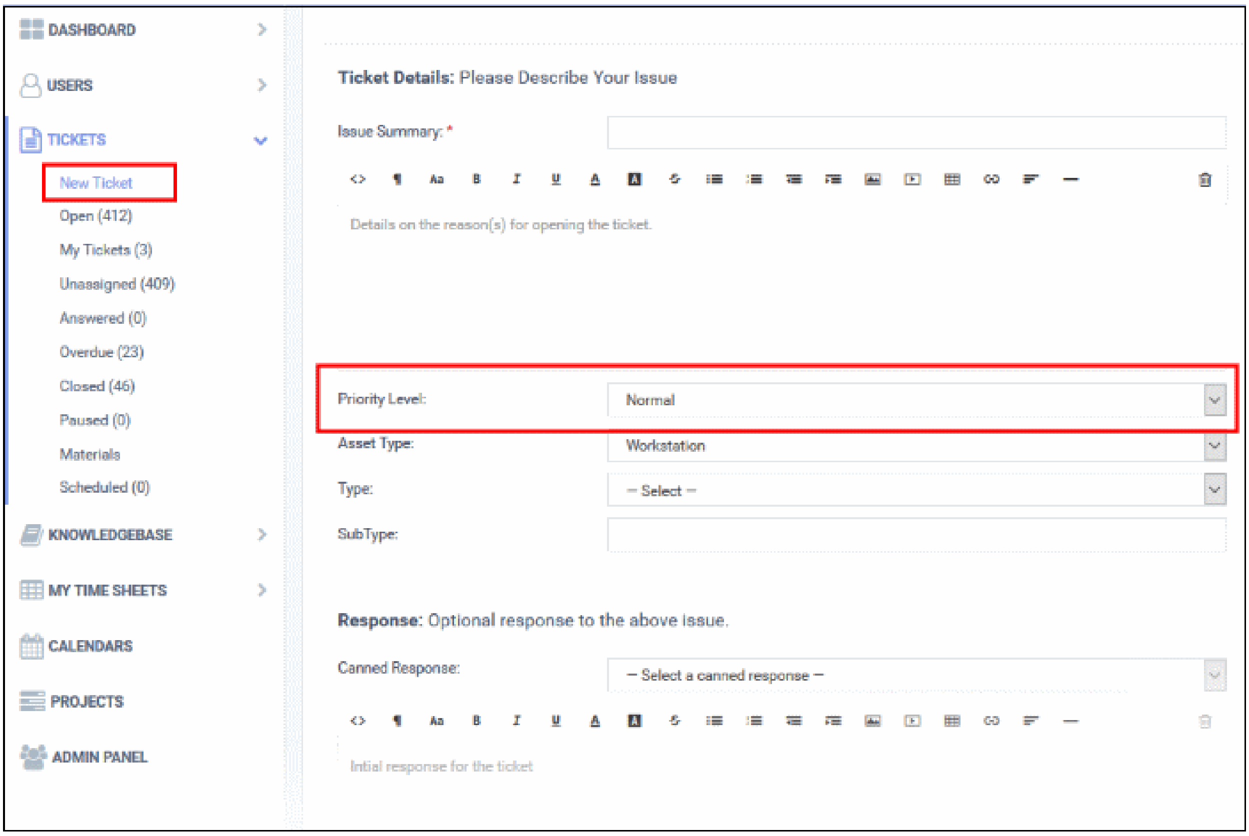




The 'Emails' section also lets you set the priority of tickets generated when a customer sends an email to a specific address:



Finally, staff can manually set priority when creating (or working on) a ticket:



Appendix 3 - How Charging Works in Service Desk

There are three components you need to consider when billing your customers - contracts, charging plans and global asset rates:

- **Contracts** (*'Admin Panel'* > *'Finance'* > *'Contracts'*). An agreement between your organization and a customer which details the charges you will levy for your services. You can configure the following items in a contract:
    - **Contract Fee** (optional). A fixed charge for a billing cycle (weekly, bi-weekly, monthly or annual). The contract fee will always be charged on top of any charging plans and/or global asset rates.
    - **Prepaid Hours** (optional). Specify how many hours of work your company will provide at no charge for the contract fee. You can set different pre-paid hours for each type of service (telephone, remote, on-site). If the time spent exceeds the pre-paid hours then only the excess time will be subject to charge.
    - **Charging Plan** (optional). See next item.
- **Charging Plans** (*'Admin Panel'* > *'Manage'* > *'Charging'*). A template applied to a contract which lets you define custom hourly rates for your services. Charging plan rates are applied after prepaid hours have been used up. You can configure the following in a charging plan:
    - Default Hourly Rate (mandatory). An hourly charge which is applied to sessions not covered by a variable rate.
    - Variable Rates (optional). Special rates 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.
- **Global Asset Rates** (*'Admin Panel'* > *'Finance'* > *'Charging'* > *'Default Charging'*). Independent of a contract, you can set hourly charges for work on specific asset types. Assets are items like workstations, servers, printers, routers etc. Global asset rates are only charged after any prepaid hours and charging plans have been processed.

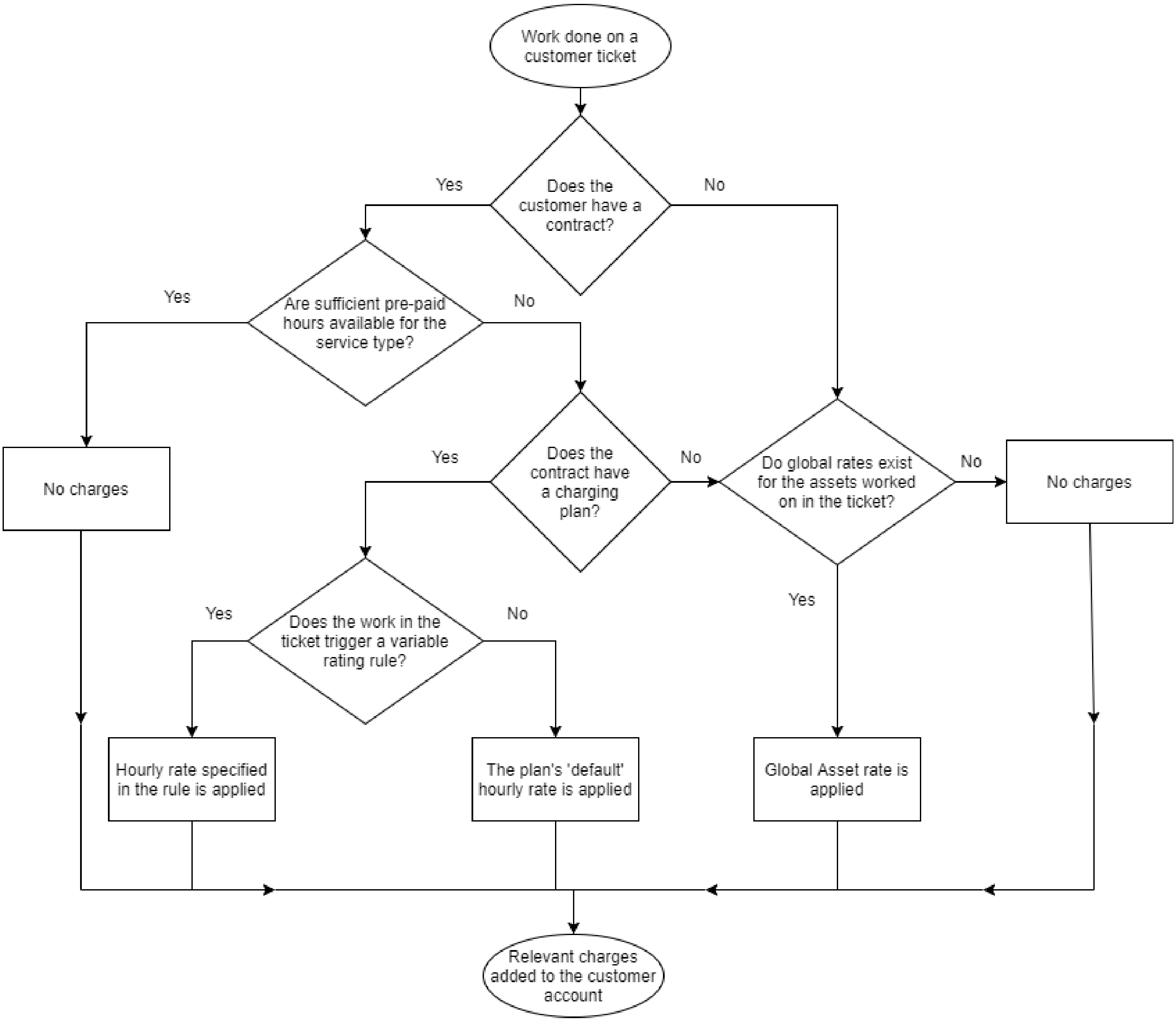
Charging Flow

When a ticket is closed, charges are calculated for the session as explained below:

- Service Desk first checks whether a contract exists for the company.
- If no contract exists then Service Desk charges any global asset rates that apply to items in the ticket. If no global rates are set for items in the ticket then no charge is made.
- If a contract exists:
    - Service Desk first processes any pre-paid hours. If pre-paid hours are available then the time is not charged.
    - If pre-paid hours are not set or have been exhausted, then Service Desk checks whether a charging plan has been applied to the contract.
    - If a charging plan exists, then Service Desk first checks the 'Variable Rate' rules.
        - If the work matches a variable rule then the hourly rate specified in the rule is applied.
        - The 'default rate' is applied to all work which does not match a variable rate rule.
    - If there is no charging plan then Service Desk applies any global asset rates that are relevant to the ticket. If no global rates are set for the assets worked on in the ticket then no charge is made.

Note. Charges for any materials added to a ticket are additional to the rates explained above.

The following chart shows the charging flow:



Note:

- A single ticket which contains work on multiple assets and service types may accrue charges from a mix of global rates and charging plan rates.
- If time spent exceeds the pre-paid hours for a service, then only the excess time will be subject to charge.

The following table shows how charging is applied for different customer types:

CONTRACT			CHARGING PLAN		GLOBAL ASSET RATES	Result
Fee set	Prepaid Hours		Default rate set	Variable rates set		
	Unlimited	Limited				
✓	✗	✗	✗	N/A	✗	Customer is charged only the fee at the interval you specify. Unlimited work on any asset for the flat-rate fee. Customer will not be charged additional rates.
✓	✓	N/A	N/A	N/A	N/A	Same as above. Unlimited pre-paid hours over-rules charging plans and global asset rates.
✓	✗	✓	✗	N/A	✗	Customer is charged the fee at the interval you specify. Prepaid hours are covered by the fee. When pre-paid hours are exhausted, the extra hours worked will not be charged as no rates have been set.
✓	✗	✓	✗	N/A	✓	Customer is charged the fee at the interval you specify. Pre-paid hours are included in the fee. After pre-paid hours are used up, customer is charged at global asset rate. If the service involves an asset which does not have a global rate, then the extra hours for that asset type will not be charged
✓	✗	✗	✓	✗	N/A	Customer is charged the fee at the interval you specify. The time spent on all service sessions is charged at the default hourly rate in the charging plan.
✓	✗	✓	✓	✗	N/A	Customer is charged the fee at the interval you specify. Pre-paid hours are included in the fee. After pre-paid hours are used up, customer is charged at the default hourly rate in the charging plan.
✓	✗	✓	✓	✓	N/A	Customer is charged the fee at the interval you specify. Pre-paid hours are included in the fee. After pre-paid hours are used up, customer is charged at the variable rate for specific types of work, and the default hourly rate for all other types of work.

Read More:

- For more details on the Contracts, see **Contracts**.
- For more details on the Charging Plans,see **Manage Charging Plans**
- For more details on the Global Asset Rates, see **Default Charging Plan** in **Manage Charging Plans**

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

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