



Service Desk Staff Guide

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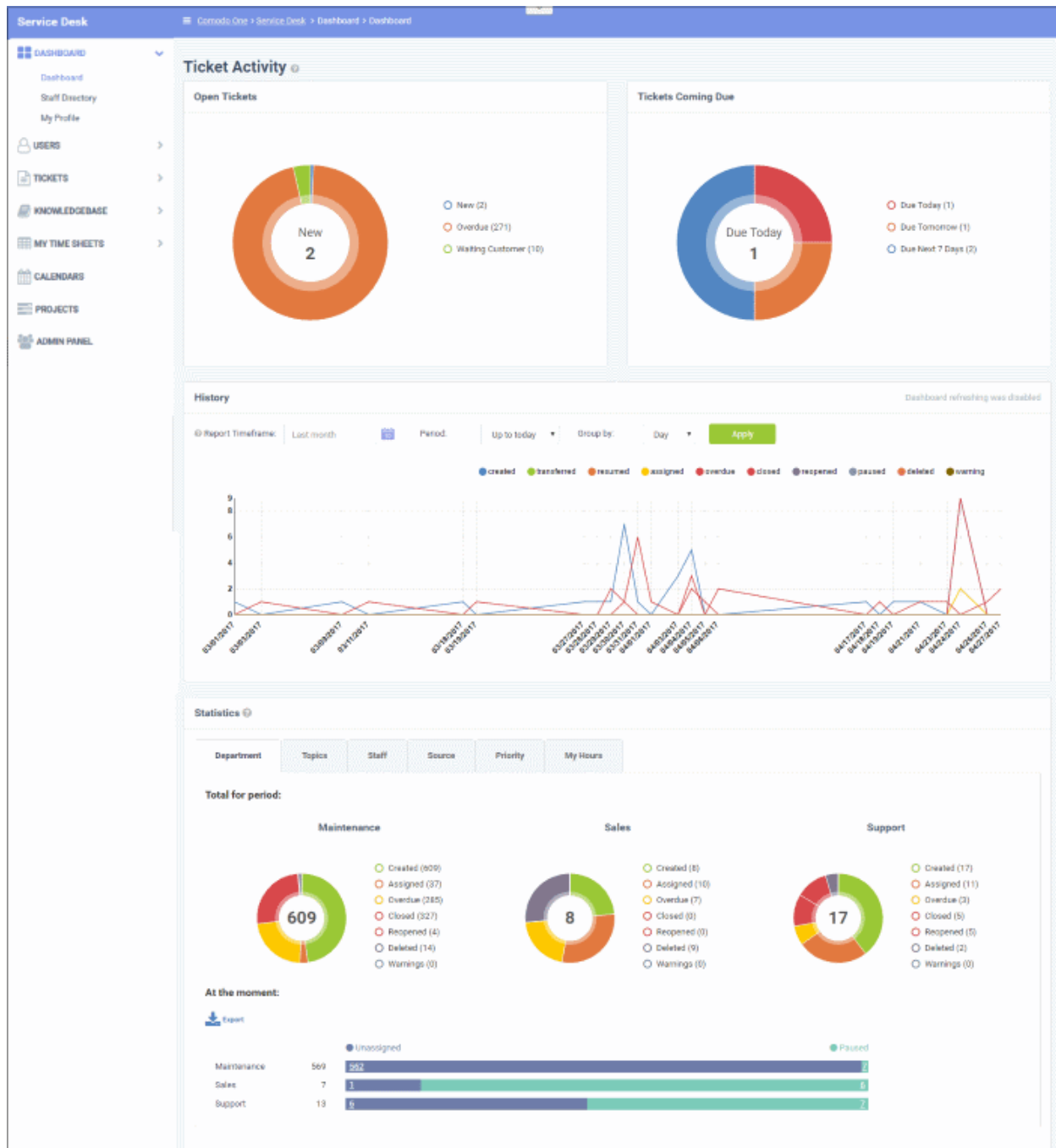
ITarian
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1 Introduction to Service Desk Module

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



Key Features:

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

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

There are two types of charging plans:

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

Guide Structure

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

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

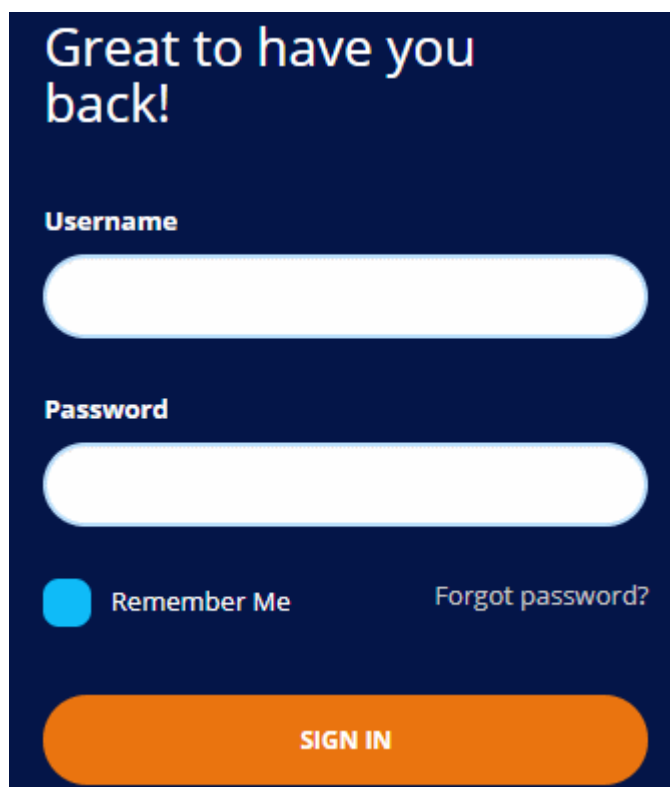
1.1 Quick Start

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

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

Step 1 - Login to the Admin Console

To access the Service Desk Module, login to ITarian with your user name and password at <https://www.itarian.com/app/msp/login>.



The screenshot shows a login interface with a dark blue background. At the top, it says "Great to have you back!". Below this are two input fields: "Username" and "Password". To the left of the "Remember Me" text is a blue checkbox. To the right of the "Remember Me" text is a link that says "Forgot password?". At the bottom of the form is a large orange button with the text "SIGN IN" in white capital letters.

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

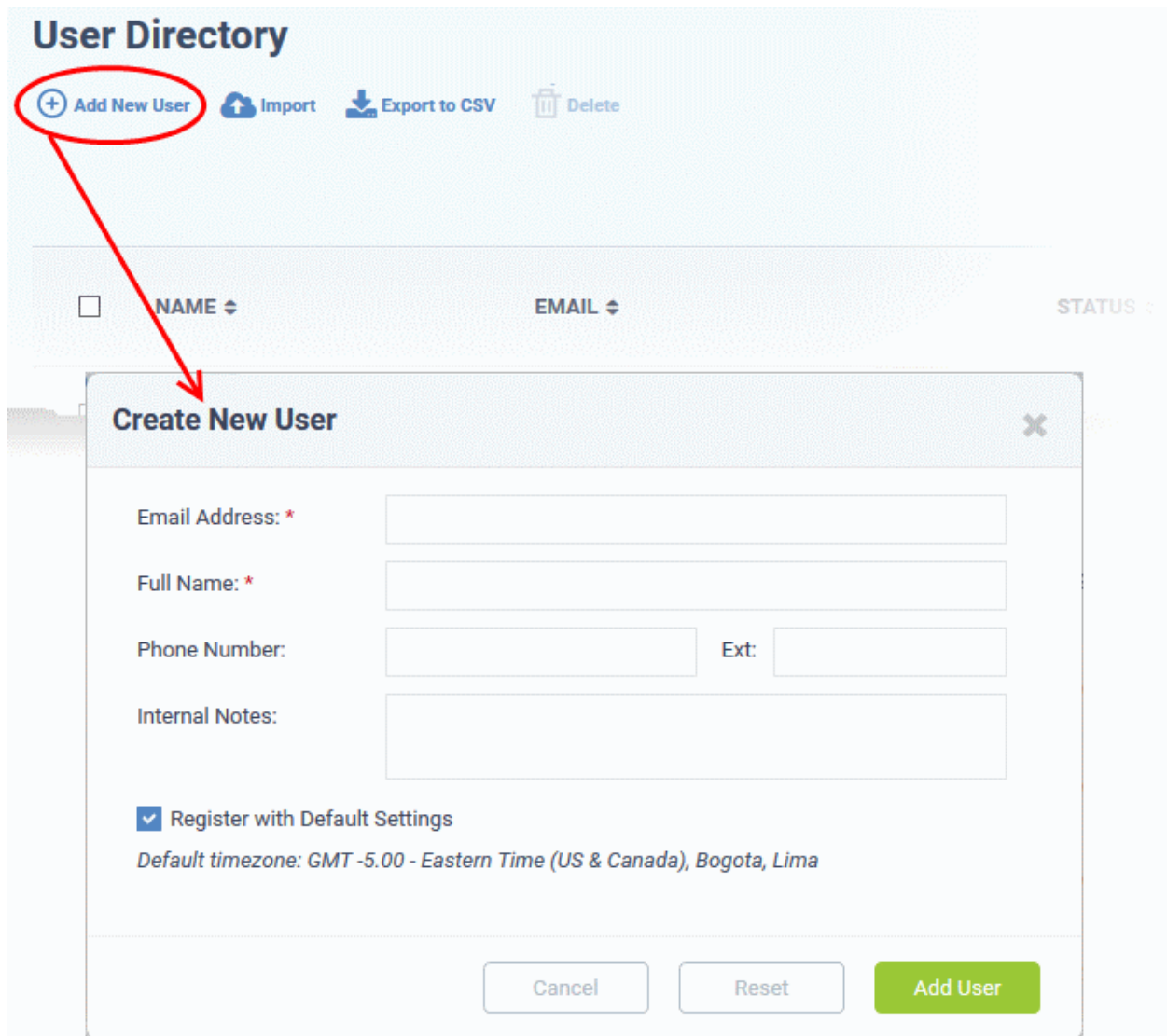
By default, Service Desk will open at 'Staff Panel' > 'Open Tickets'.

Step 2 - Enroll Users

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

Enroll new users

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



User Directory

[+ Add New User](#) [Import](#) [Export to CSV](#) [Delete](#)

NAME **EMAIL** **STATUS**

Create New User

Email Address: *

Full Name: *

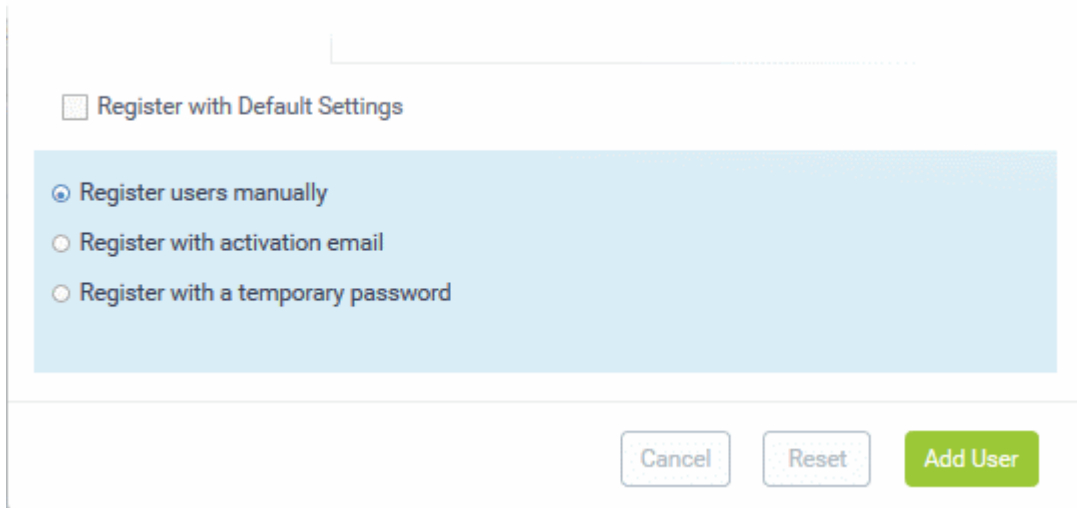
Phone Number: Ext:

Internal Notes:

Register with Default Settings

Default timezone: GMT -5.00 - Eastern Time (US & Canada), Bogota, Lima

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



Register with Default Settings

Register users manually

Register with activation email

Register with a temporary password

Cancel Reset Add User

- **Register users manually** - The user is initially added a guest and needs to be manually registered afterwards. You can register a guest as follows:

Click 'Users' > 'User Directory' > click on the name of the guest > Click the 'Register' button

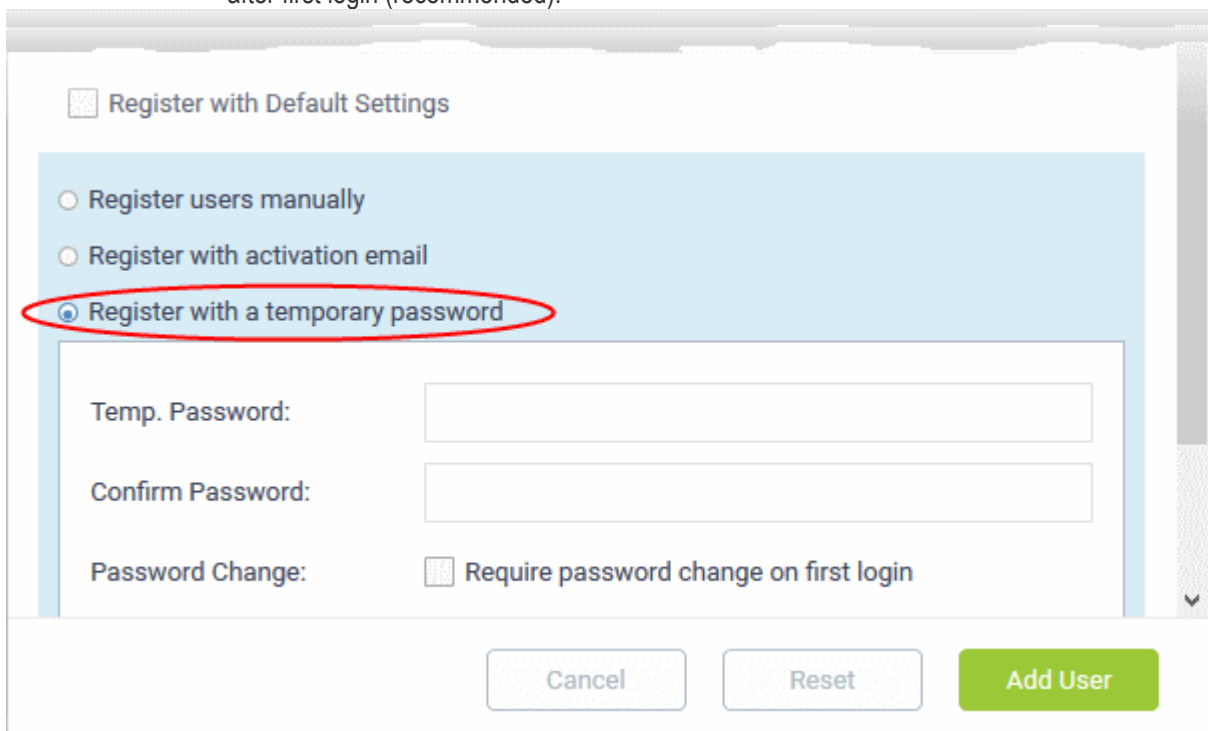
- **Register with activation email** - The user is initially added as a guest and sent a mail which contains a link to register their account.

The link leads to your support web portal where the user will create a password and so register their account. After registration, the user can login and manage/view their tickets.

- **Register with a temporary password** - Create a temporary account password which registers the user immediately.

You need to send the password and URL of your support portal to the user. This allows them to login and manage their tickets.

'Require password change on first login' - Enable to force the user to create a new password after first login (recommended):



Register with Default Settings

Register users manually

Register with activation email

Register with a temporary password

Temp. Password:

Confirm Password:

Password Change: Require password change on first login

Cancel Reset Add User

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

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

- Click 'Add User'.

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

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

Step 3 - Create new customers and assign users to customers

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

There are two options to add a customer:

- Create a customer in the ITarian Interface (preferred)
Customers added to ITarian are fully managed, which means they are also available in other ITarian modules (**Service Desk**, Endpoint Manager, Dome Shield).
 - Click 'Management' > 'Customer' > 'New Customer' to create a customer in ITarian.

- **Create a customer in Service Desk.**

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

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

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

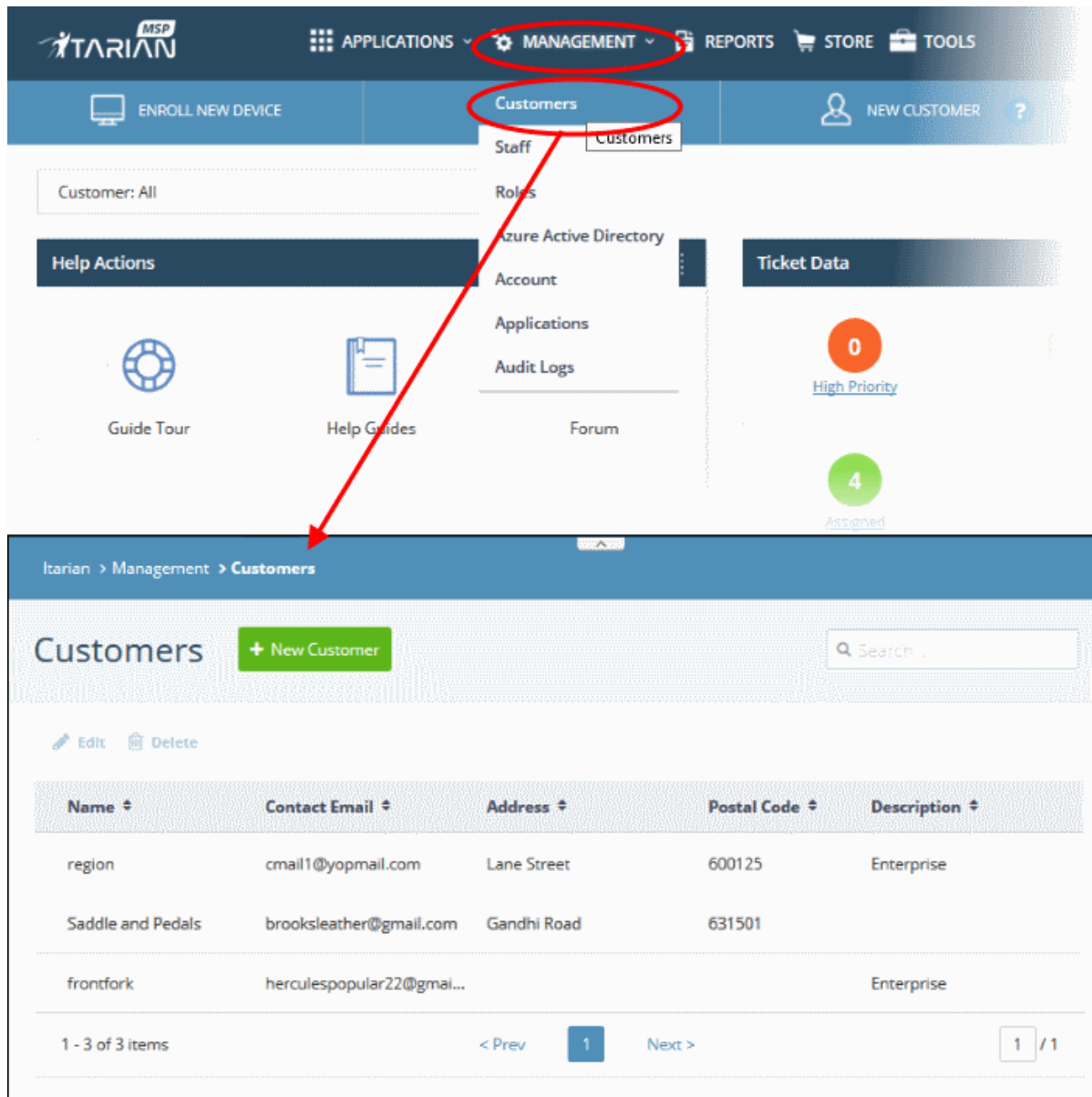
Add a new customer

- **Add a customer in ITarian**
- **Add a customer in Service Desk**

Add a customer in the ITarian interface

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

- Log in at <https://www.itarian.com/app/msp/login>.
- Click 'Management' > 'Customer'
- The interface shows any existing customers added to ITarian:



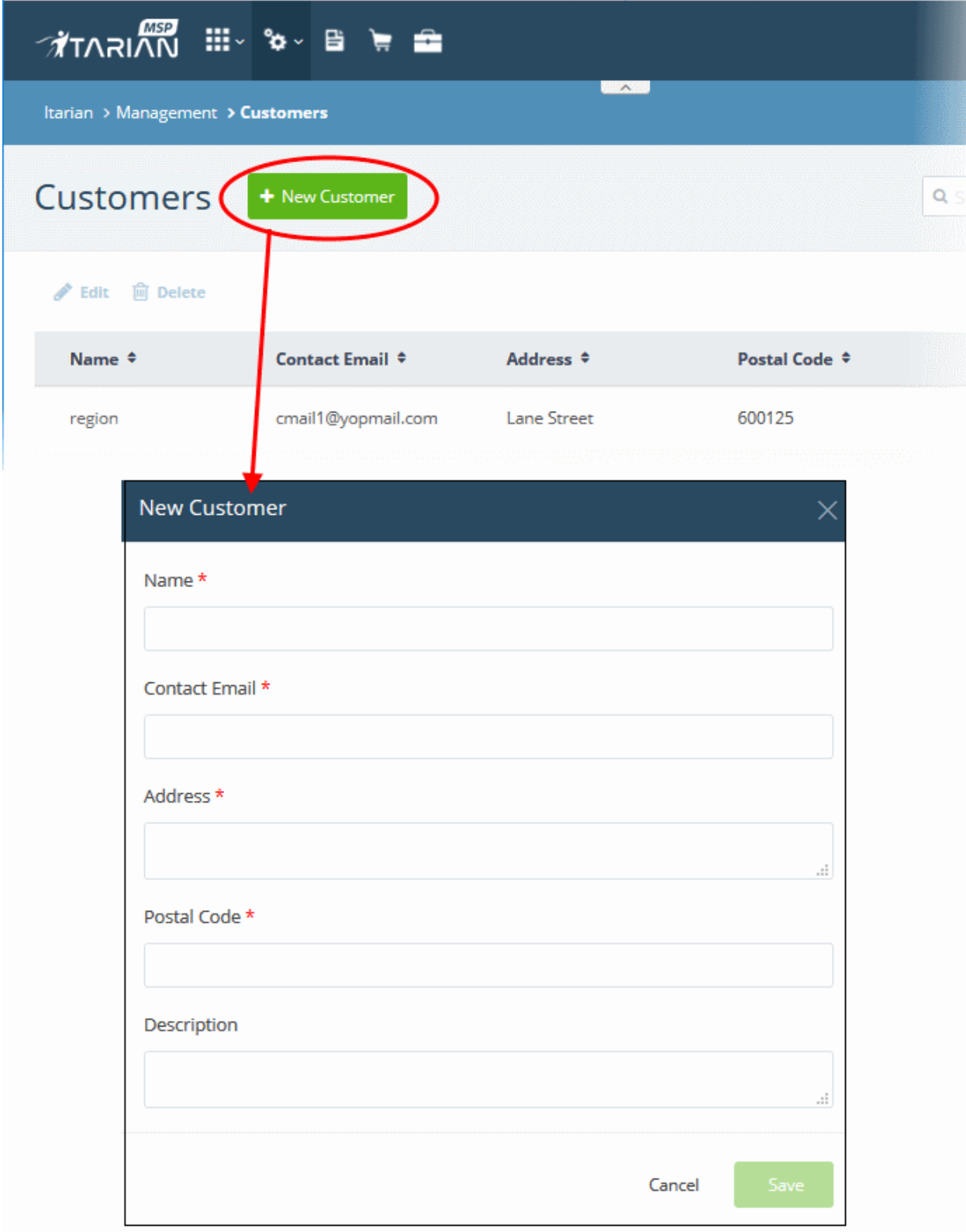
The screenshot shows the ITarian Management interface. The top navigation bar includes 'APPLICATIONS', 'MANAGEMENT', 'REPORTS', 'STORE', and 'TOOLS'. The 'MANAGEMENT' menu is expanded, showing options like 'Staff', 'Customers', 'Roles', 'Azure Active Directory', 'Account', 'Applications', 'Audit Logs', and 'Forum'. The 'Customers' option is circled in red. A red arrow points from this menu item to the 'Customers' page below.

The 'Customers' page has a breadcrumb trail: 'Itarian > Management > Customers'. It features a '+ New Customer' button and a search bar. Below the search bar are 'Edit' and 'Delete' icons. A table lists customer records:

Name	Contact Email	Address	Postal Code	Description
region	cmal1@yopmail.com	Lane Street	600125	Enterprise
Saddle and Pedals	brooksleather@gmail.com	Gandhi Road	631501	
frontfork	herculespopular22@gmail...			Enterprise

At the bottom of the table, it shows '1 - 3 of 3 items' and navigation controls: '< Prev', '1', 'Next >', and '1 / 1'.

- Click the 'New Customer' button



The screenshot displays the ITarian MSP interface. At the top, the navigation bar shows 'Itarian > Management > Customers'. Below this, the 'Customers' section features a '+ New Customer' button, which is circled in red. A red arrow points from this button to a 'New Customer' modal form. The modal form includes the following fields:

- Name *
- Contact Email *
- Address *
- Postal Code *
- Description

The 'Cancel' and 'Save' buttons are located at the bottom right of the modal form.

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

Add a standalone customer to Service Desk

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

Service Desk > Users > Customers

Customers

+ Add New Customer
Export to CSV
Delete
Search...

CUSTOMER ID	NAME	USERS	CREATED
1	frontfork	1	04/30/2018 1:55 pm

Add New Customer

Complete the form below to add a new customer.

Create New Customer: Details on customer.

Name: *

Web Domain: *

Address:

Phone: Ext:

Website:

Internal Notes:

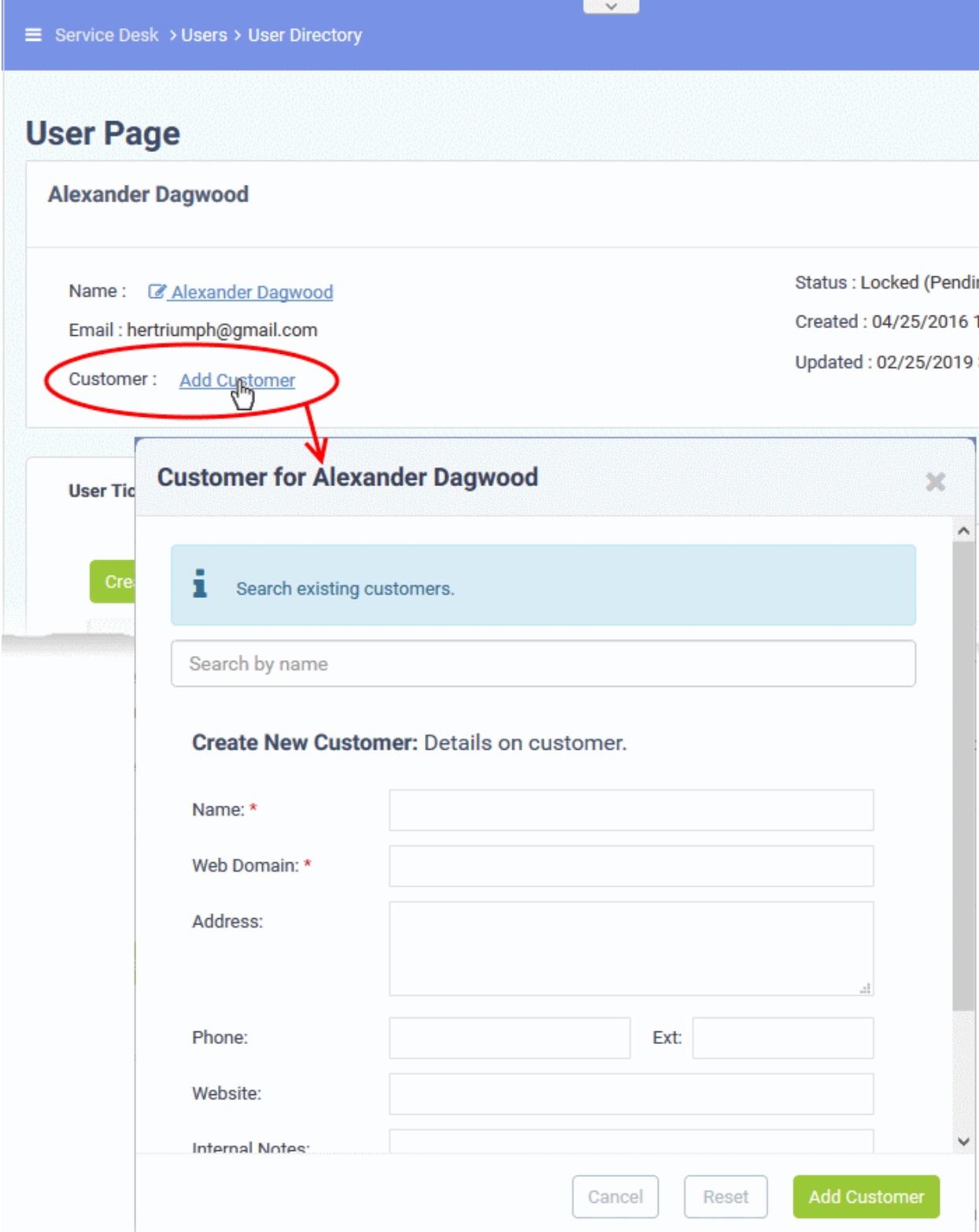
- **Name:** Enter a label for the customer company.
- **Web Domain:** Enter the name of the email domain used for employees of the company.
 - Service Desk creates two new users with email addresses in this domain - 'Monitor Agent' and 'Patch Management Agent'. These accounts are used to receive automatically generated tickets from Endpoint Manager.
 - They also assign to the customer any guests who submit tickets from an email at their domain.
- **Address** and **Phone:** Contact details of the company.
- **Website:** URL of the customer's public-facing / marketing website.
- **Internal Notes:** Enter any comments about the customer.

- Click 'Add Customer' after completing the form.

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

Assign users to a customer

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



The screenshot displays the 'User Page' for Alexander Dagwood. The user's details are as follows:

- Name: [Alexander Dagwood](#)
- Email: hertriumph@gmail.com
- Status: Locked (Pending)
- Created: 04/25/2016 1
- Updated: 02/25/2019 :

The 'Customer' field is set to [Add Customer](#), which is circled in red. A modal window titled 'Customer for Alexander Dagwood' is open, showing a search bar and a form to create a new customer.

Customer for Alexander Dagwood

Search existing customers.

Search by name

Create New Customer: Details on customer.

Name: *

Web Domain: *

Address:

Phone: Ext:

Website:

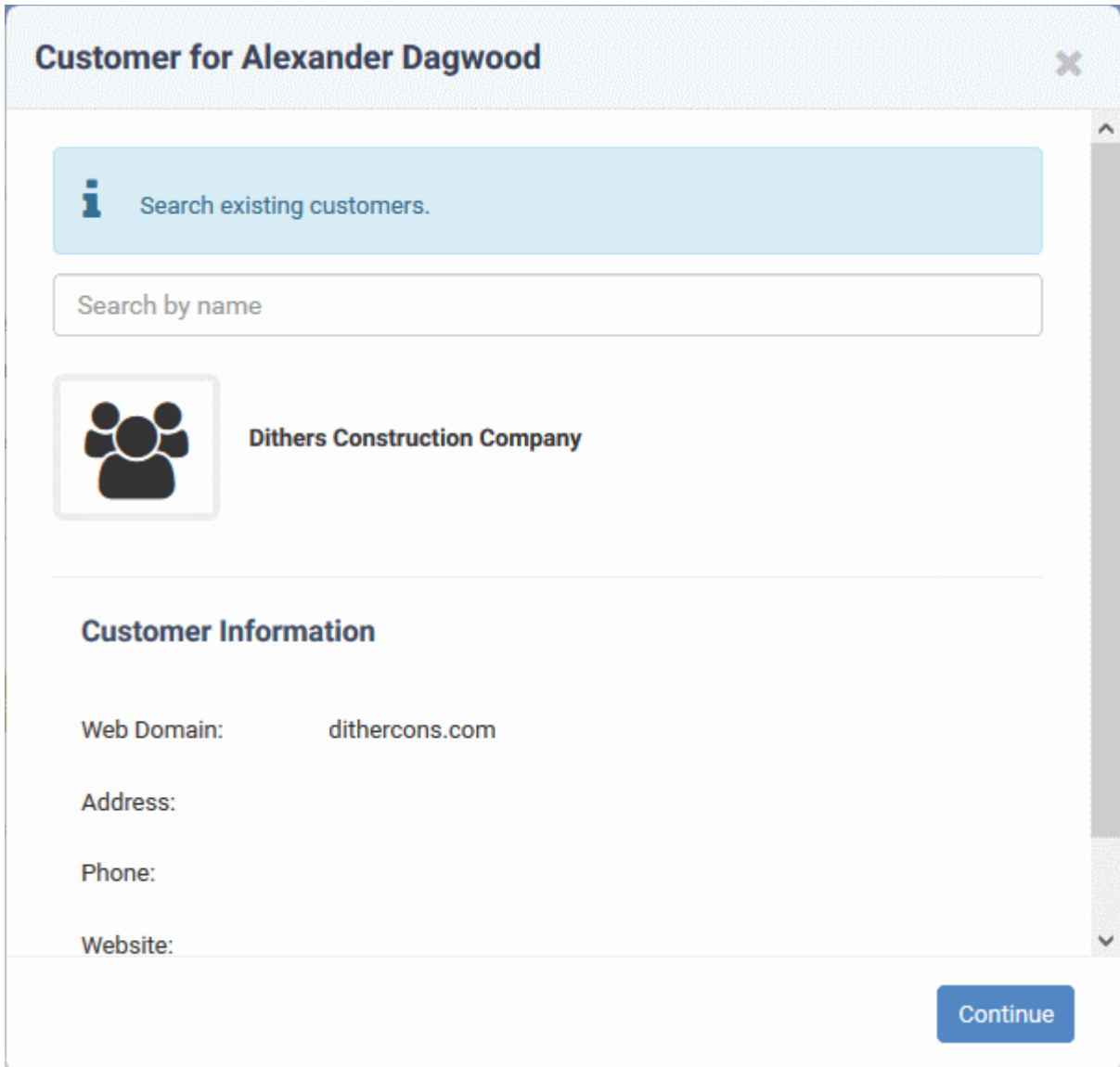
Internal Notes:

Buttons: Cancel, Reset, Add Customer

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

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


A confirmation appears after choosing the customer:



Customer for Alexander Dagwood ✕

i Search existing customers.

Search by name

 **Dithers Construction Company**

Customer Information

Web Domain: dithercons.com

Address:

Phone:

Website:


[Continue](#)

- Click 'Continue'.

The user will be added to the customer.

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

Customer for Alexander Dagwood ✕

 Search existing customers.

Create New Customer: Details on customer.

Name: *

Web Domain: *

Address:

Phone: Ext:

Website:

Internal Notes:

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

The new customer and user are added to Service Desk.

Step 4 - Manage Tickets

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

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

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

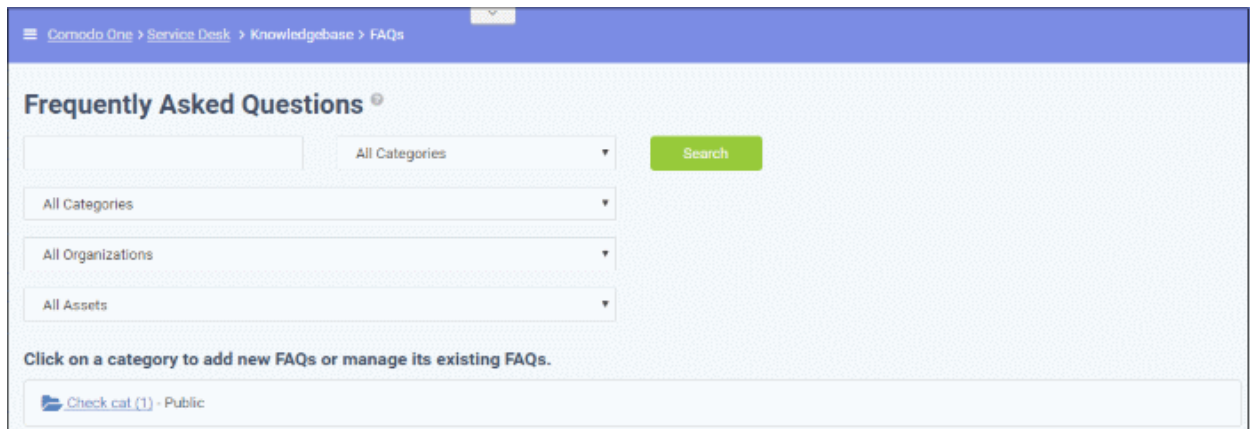
Step 5 - Manage Knowledgebase

The 'Knowledgebase' allows you to:

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

To create an FAQ:

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



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

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

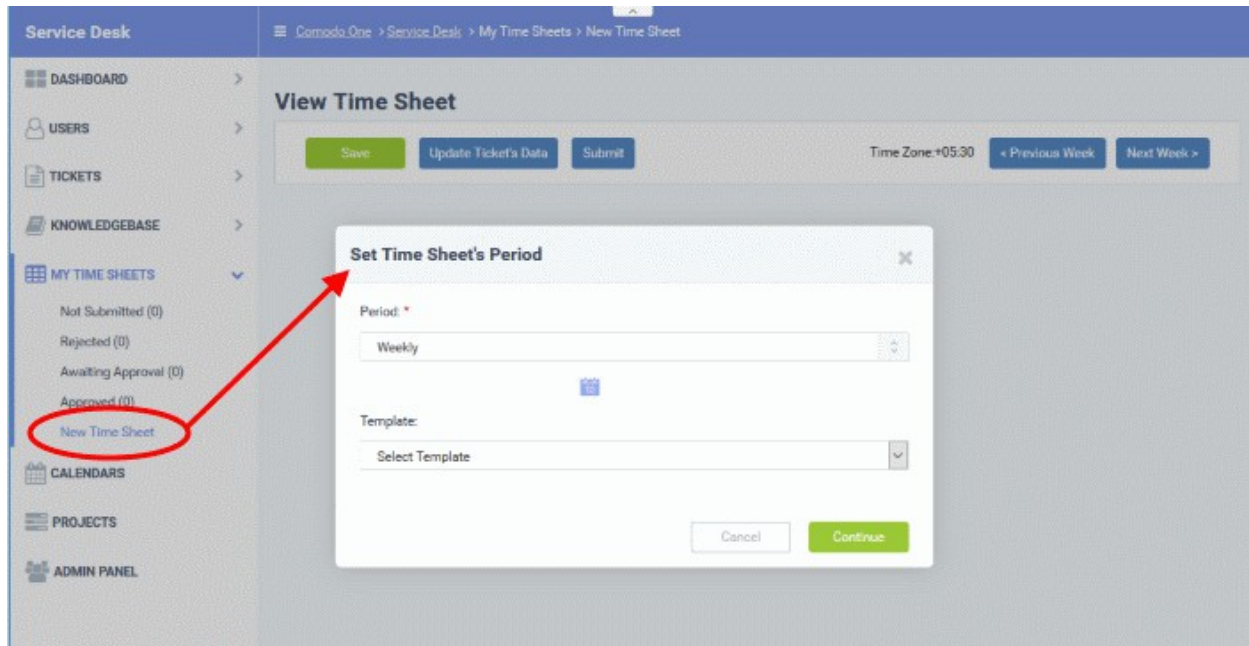
Step 6 - Manage Your Time Sheets

The 'My Time Sheets' interface allows you to:

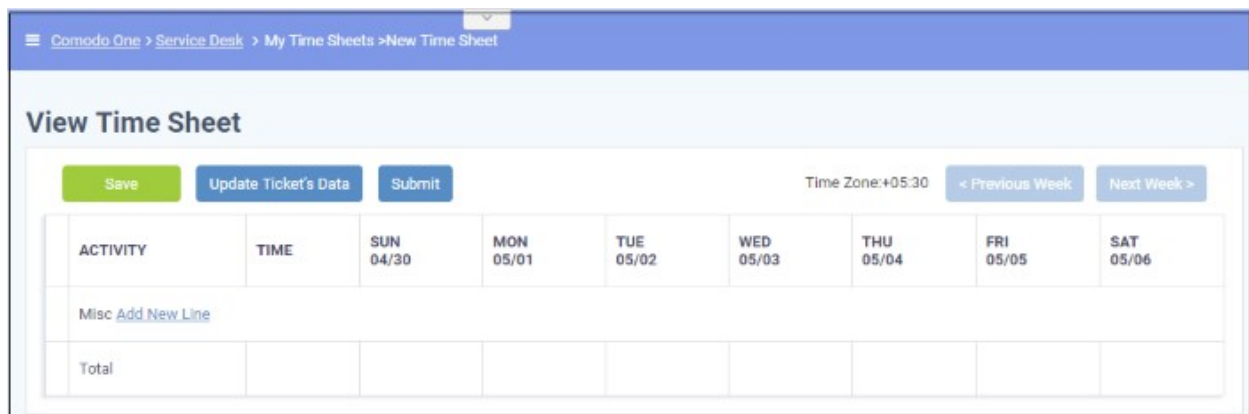
- Create time sheets to record your activities
- Submit time sheets for approval
- You can enter activities manually and / or import tasks from tickets

To create a time sheet

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



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

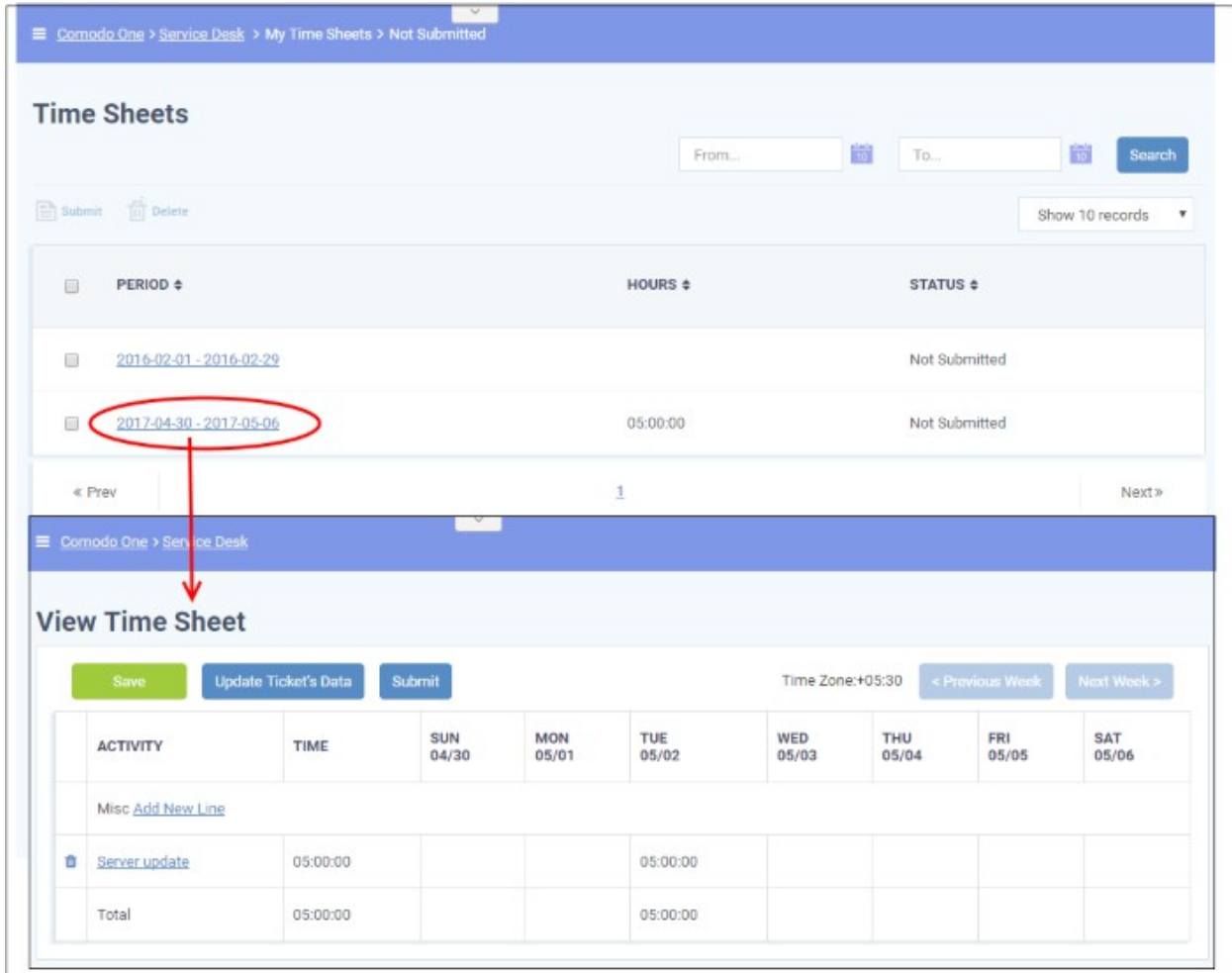


ACTIVITY	TIME	SUN 04/30	MON 05/01	TUE 05/02	WED 05/03	THU 05/04	FRI 05/05	SAT 05/06
Misc Add New Line								
Total								

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

To update a time sheet

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

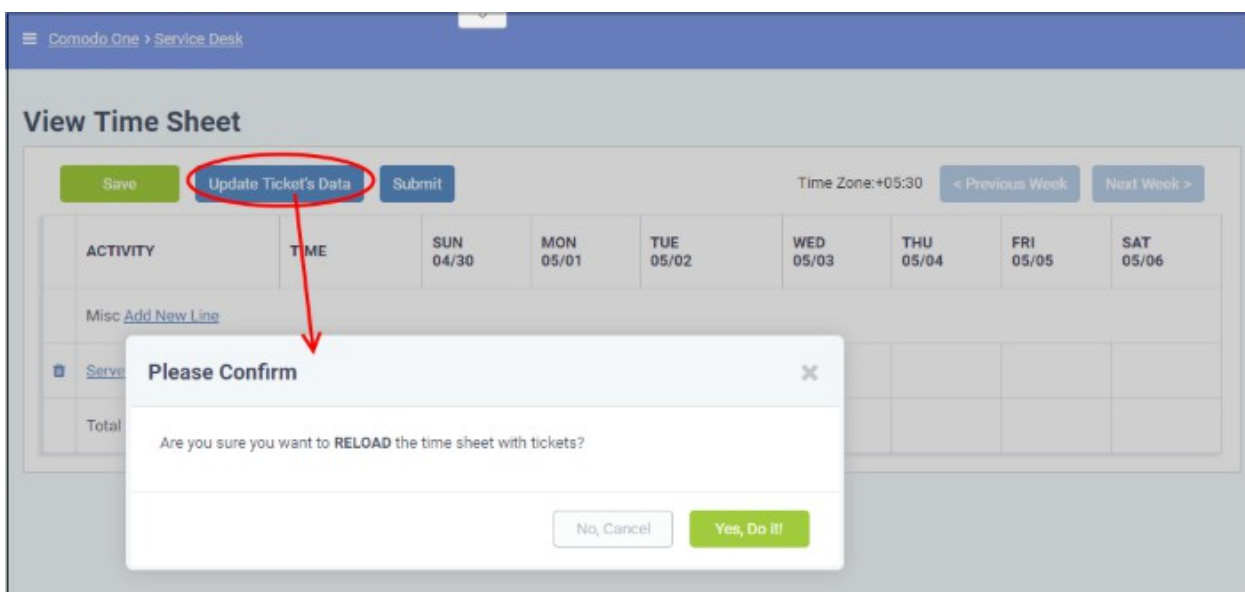


The screenshot shows the 'Time Sheets' interface. The top navigation bar includes 'Comodo One > Service Desk > My Time Sheets > Not Submitted'. The main heading is 'Time Sheets'. Below it are search filters for 'From...' and 'To...' with a 'Search' button. There are also 'Submit' and 'Delete' icons and a 'Show 10 records' dropdown. The table below has columns for 'PERIOD', 'HOURS', and 'STATUS'. One row is circled in red: '2017-04-30 - 2017-05-06' with '05:00:00' hours and 'Not Submitted' status. Below the table are 'Prev' and 'Next' navigation buttons.

The second screenshot shows the 'View Time Sheet' interface. It has buttons for 'Save', 'Update Ticket's Data', and 'Submit'. The 'Time Zone' is '+05:30'. There are also '< Previous Week' and 'Next Week >' buttons. The table below has columns for 'ACTIVITY', 'TIME', and days of the week: 'SUN 04/30', 'MON 05/01', 'TUE 05/02', 'WED 05/03', 'THU 05/04', 'FRI 05/05', and 'SAT 05/06'. The first row is 'Misc Add New Line'. The second row is 'Server update' with '05:00:00' time on 'TUE 05/02'. The 'Total' row shows '05:00:00' for 'TUE 05/02'.

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

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



The screenshot shows the 'View Time Sheet' interface with a confirmation dialog box. The 'Update Ticket's Data' button is circled in red. The dialog box is titled 'Please Confirm' and contains the text: 'Are you sure you want to RELOAD the time sheet with tickets?'. There are two buttons at the bottom: 'No, Cancel' and 'Yes, Do It!'.

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

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

View Time Sheet

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

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

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

The screenshot shows the 'View Time Sheet' interface with a 'Time Sheet Entry' dialog box open. A red arrow points from the 'Add New Line' link in the table to the dialog box. The dialog box contains an 'Activity' field and time selection fields for each day of the week.

The 'Time Sheet Entry' dialog will appear.

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

Activity:*

Sun 04/30

Mon 05/01

Tue 05/02

CHOOSE TIME

Time

Hour

Minute

Second

Done

Fri 05/05

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

The activity will be added to the list.

View Time Sheet

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

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

- Click 'Save' for your changes to take effect

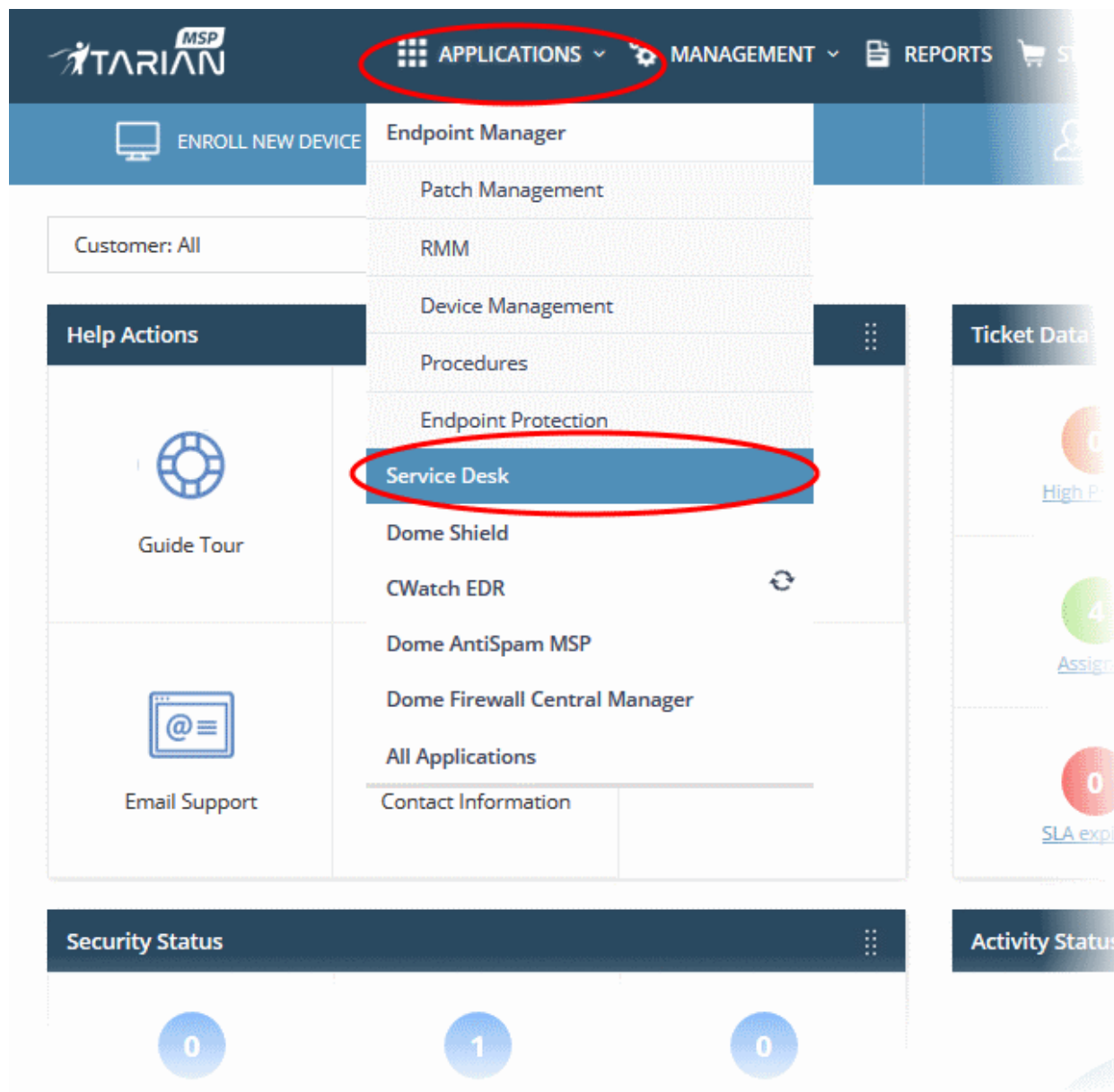
You can update the activity at any time by clicking on it.

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

1.2 Login to the Service Desk Module

First login to ITarian at <https://www.itarian.com/app/msp/login>.

- Click 'Applications' > 'Service Desk' in the ITarian interface



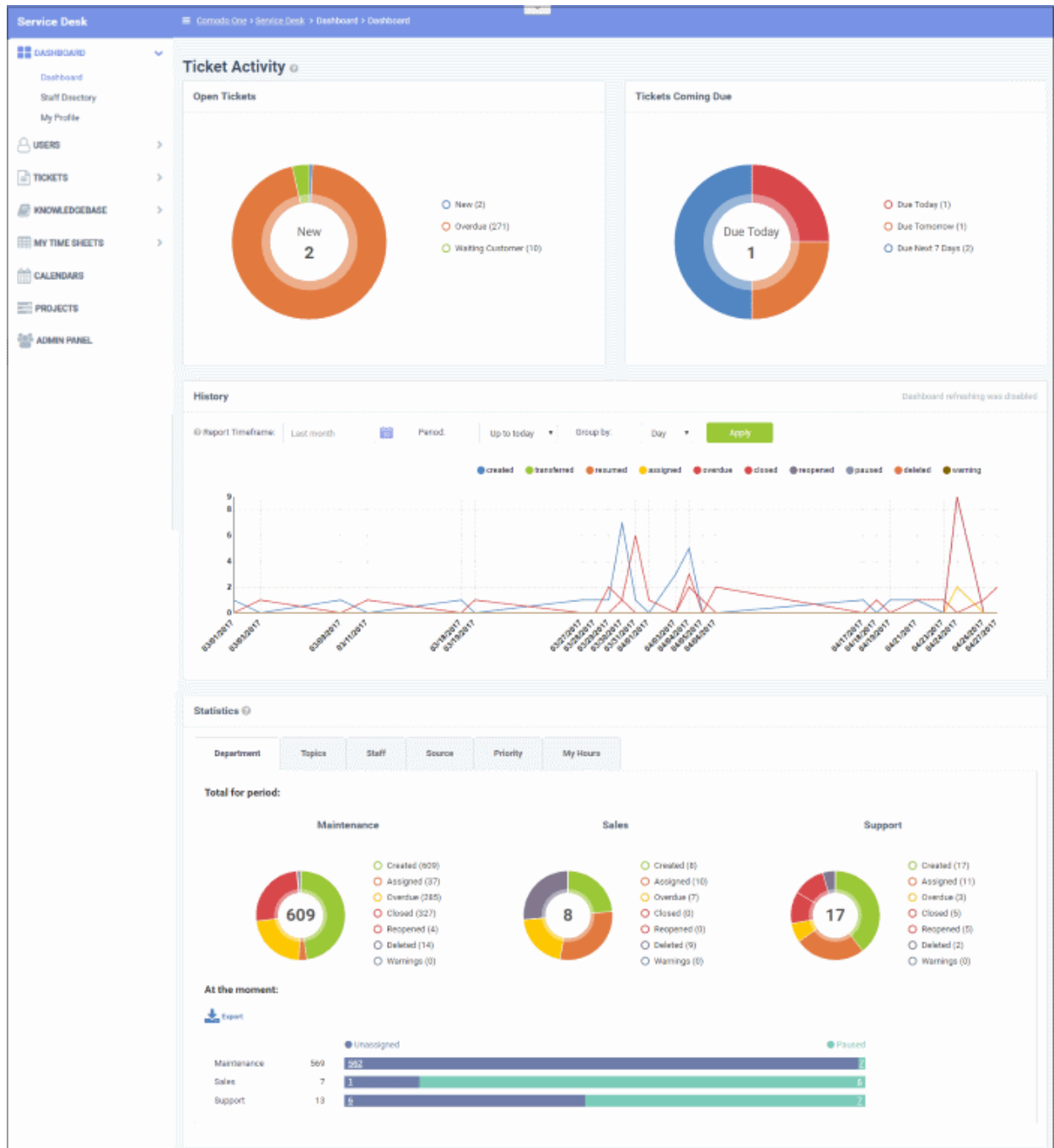
- Two factor authentication - Admins with appropriate privileges can setup two factor-authentication for their users.
 - Click 'Management' > 'Account' > 'Account Security Details' to do this.
 - See [Set up Two-Factor Login Authentication](#) in the ITarian admin guide if you need more help.

2 Service Desk Staff Panel

- The 'Staff Panel' allows staff (aka 'agents') to manage their tickets, create new users, edit organizations, manage knowledge-base items, manage projects and update their time sheets.
- Staff members are enrolled by administrators. The permissions of a staff member are determined by the

role to which they are assigned ('Admin Panel' > 'Staff' > 'Roles') and the department to which they belong 'Admin Panel' > 'Staff' > 'Departments').

- Staff Members that are given admin permissions can also access the admin panel.




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

Main Functional Areas

- **Dashboard** - Allows staff to view a graphical summary of ticket activity, including their assigned, closed and due tickets. Tickets are also sorted by department, ticket category, staff member, source and priority. See **'Staff Panel Dashboard'** for more details.
- **Users** - Allows staff to add/import users, and manage customers. The section also allows staff to assign users to customers. See **Manage Users and Customers** for more.
- **Tickets** - Allows staff to manage tickets created by users (and tickets created by staff on behalf of a user).

See **Manage Tickets** for more.

- **Knowledgebase** - Allows staff to create FAQs that can be hosted on your support portal. Staff can also create canned responses to common questions which can be quickly pasted into a ticket. See **Manage Knowledgebase** for more.
- **My Time Sheets** - 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 **Manage Staff Time Sheets** more details.
- **Calendars** - Create appointments. Appointments can be shared with and tracked by other staff members. See '**Manage Calendars**' for more details.
- **Projects** - Allows staff to create task-orientated projects which span multiple tickets, departments and agents. See **Manage Projects** for more details.

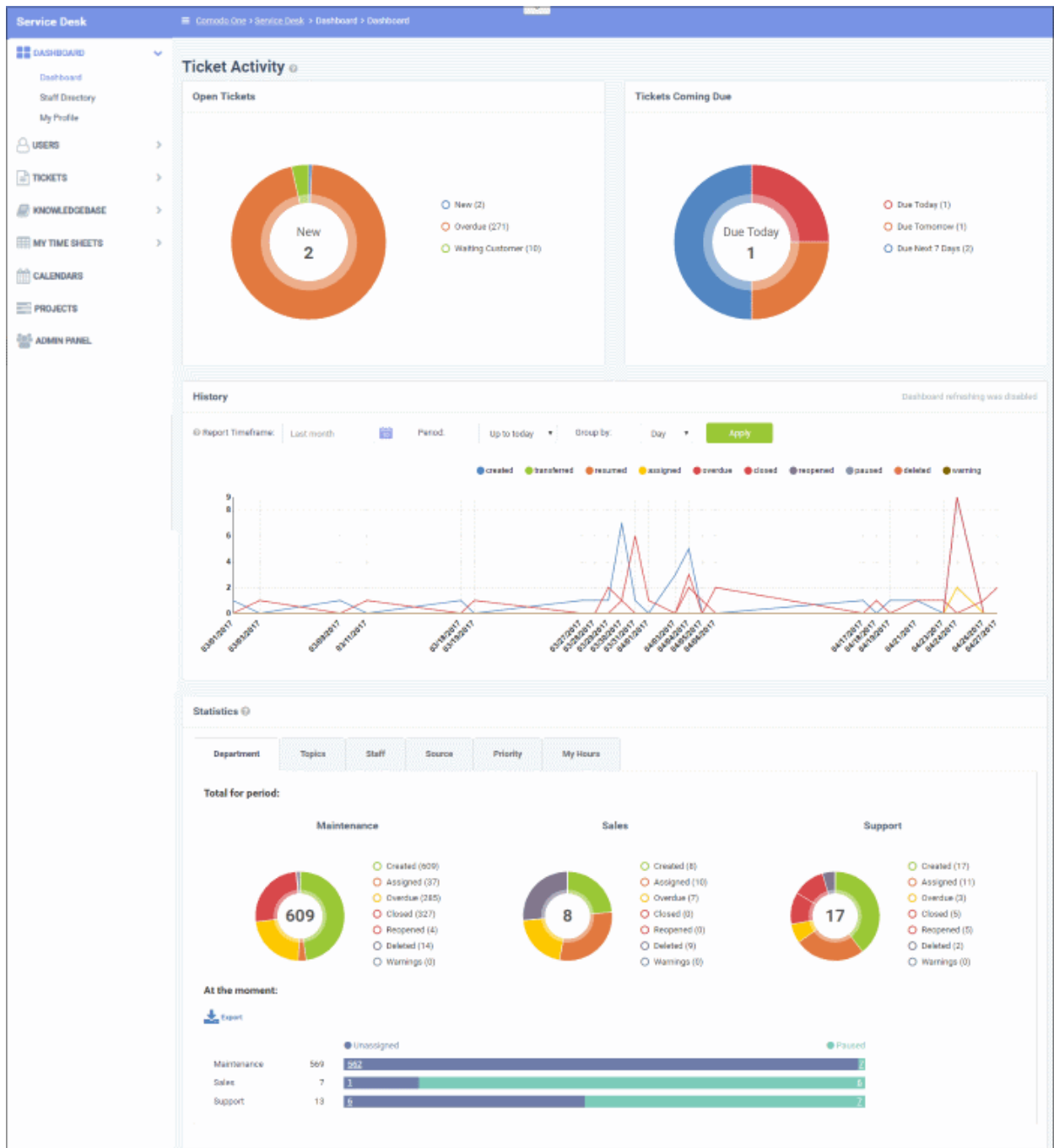
Various interfaces display a informational tool-tip  beside key features. Click the tool-tip to view quick help on the feature.

2.1 Staff Panel Dashboard

The staff panel dashboard contains three areas:

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

The following sections explain more about:

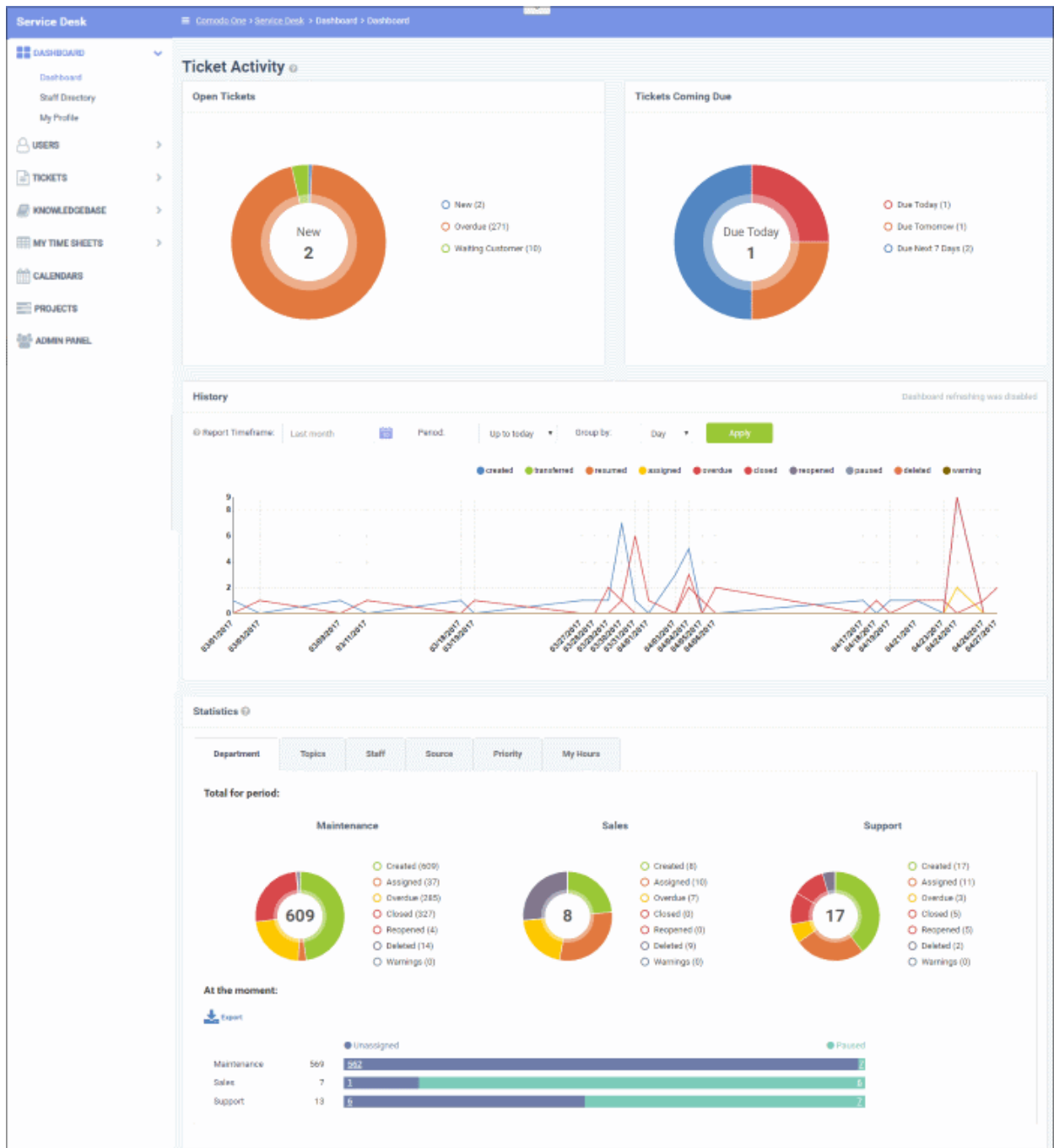


- **View the Dashboard and Export Reports**
- **View Staff Members**
- **My Profile**

2.1.1 View the Dashboard and Export Reports

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

Ticket Activity

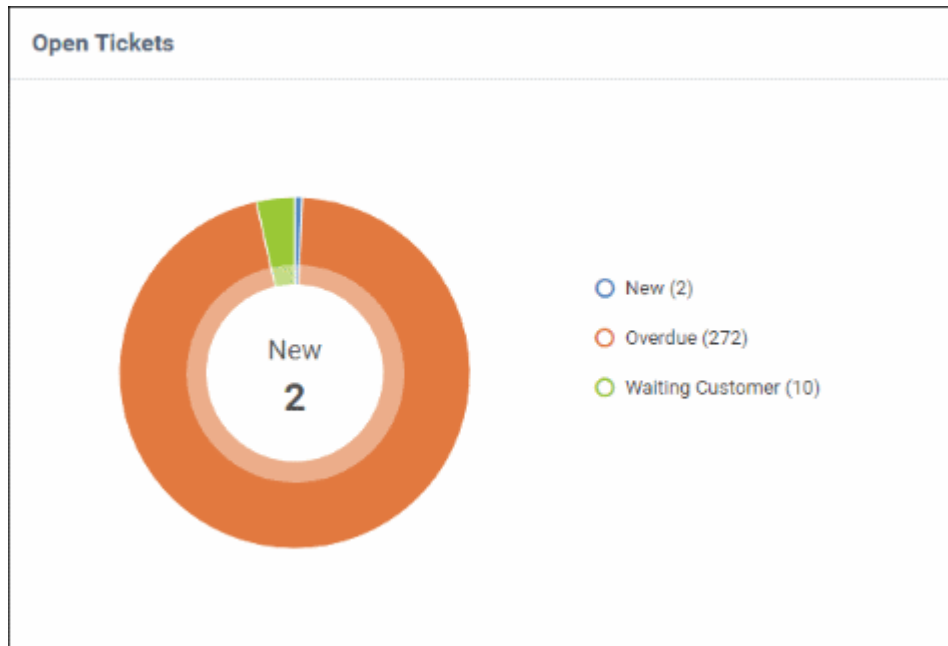


Ticket activity contains the following sections:

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

Open Tickets

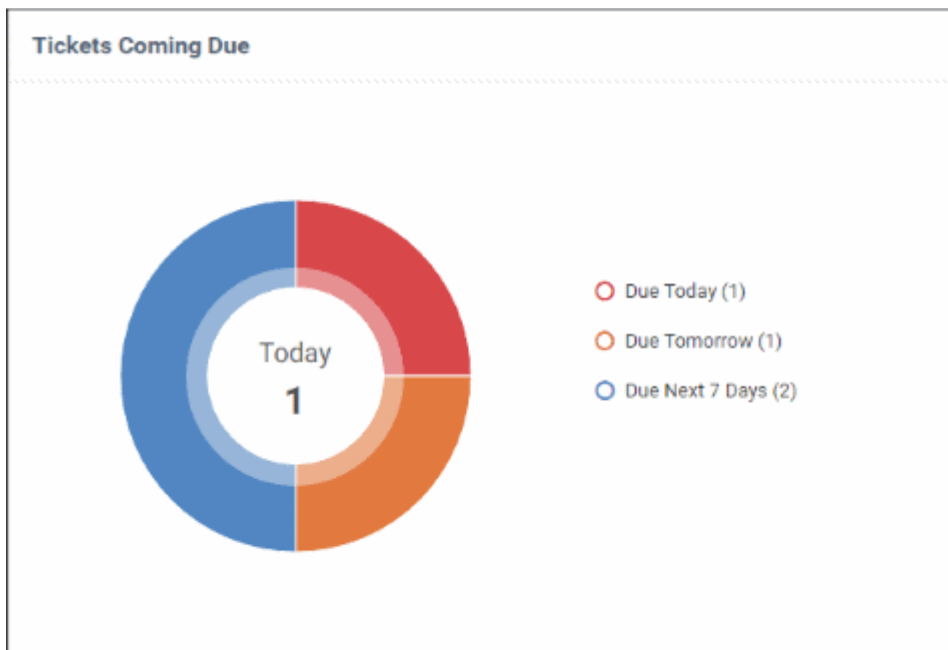
The total number of unresolved tickets. The pie chart breaks this down into tickets that are yet to be attended (new), overdue and awaiting customer response.



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

Tickets Coming Due

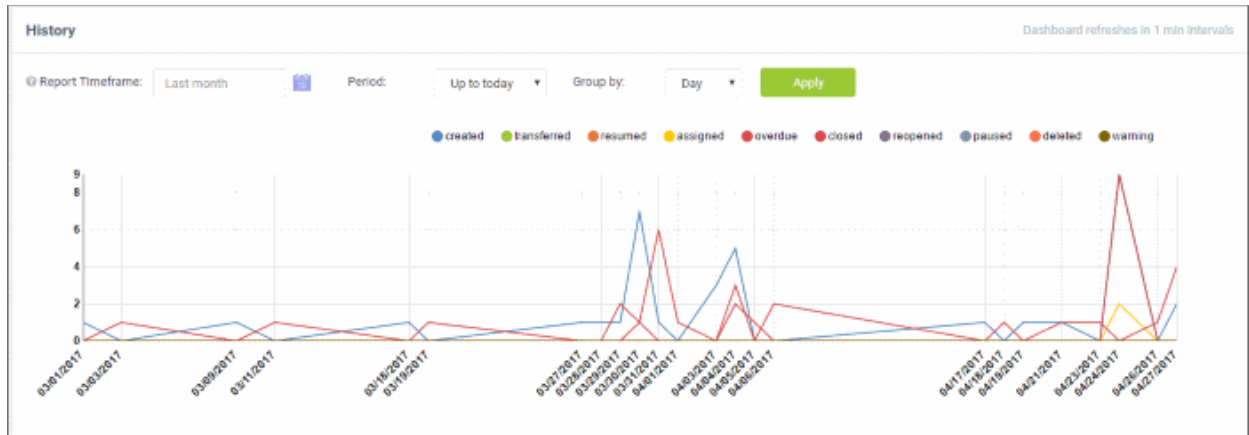
A heads up on tickets that are due in the near future:



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

Ticket History Graph

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



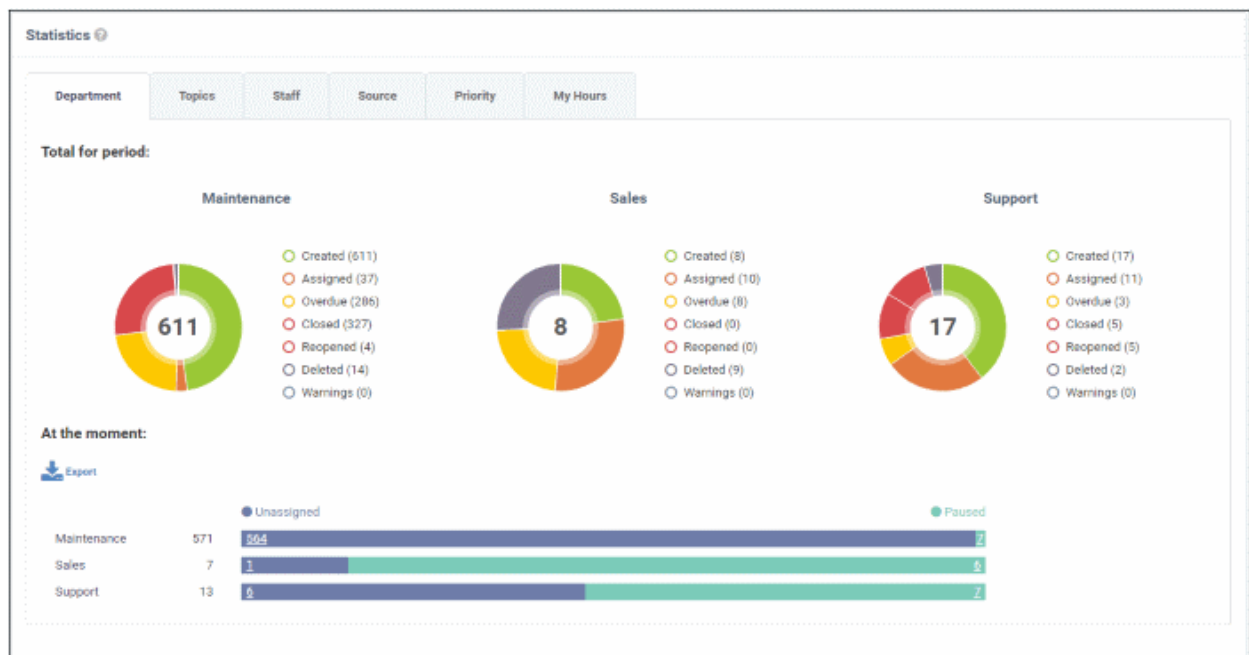
By default, the graph shows details for the previous 30 days. Use the 'Report timeframe' options to change the time-period. Click 'Refresh' to implement your changes.

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

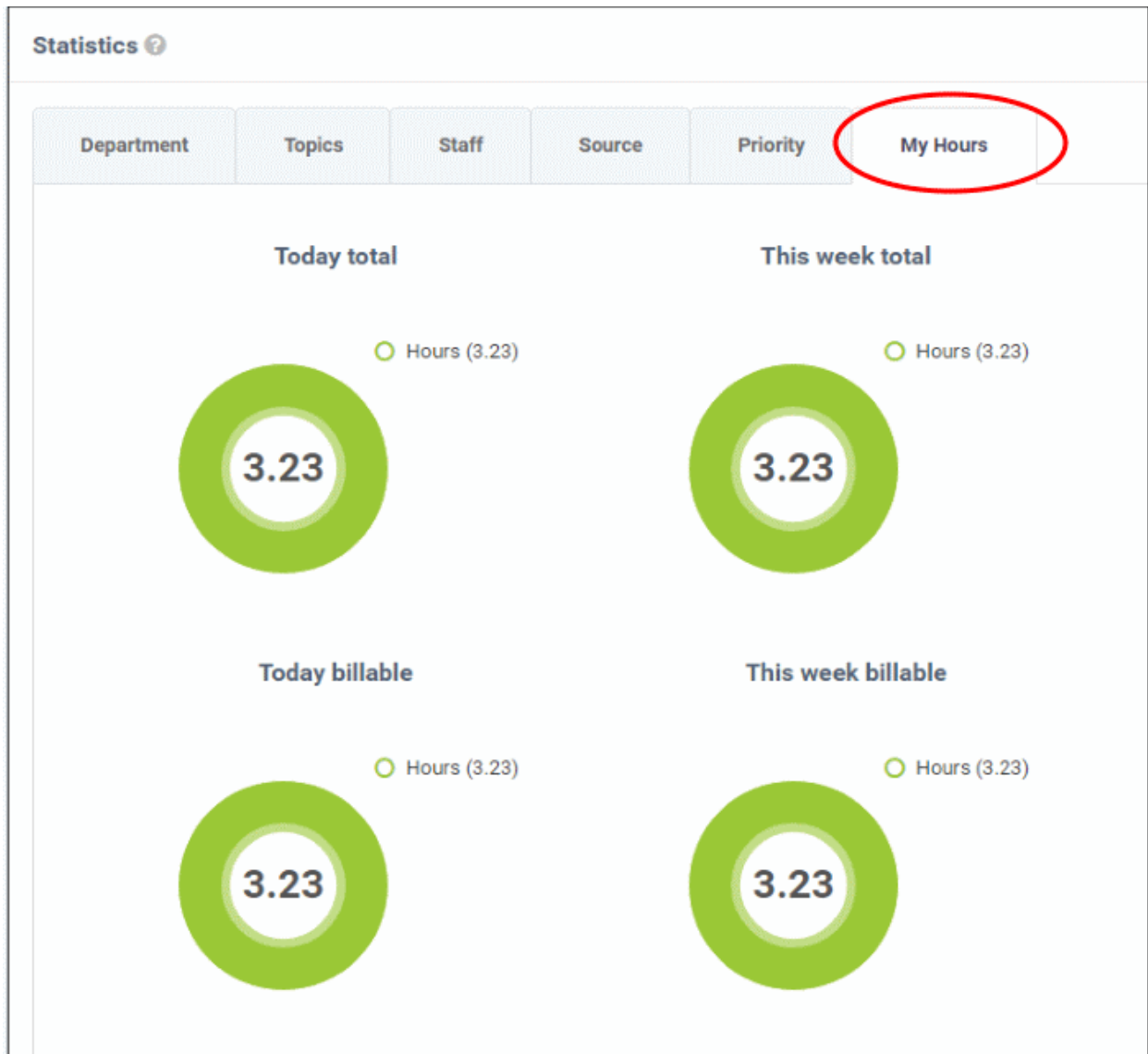
Statistics

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

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



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



Export statistics to a CSV file

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

2.1.2 View Staff Members

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

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

Staff Members

Show 10 records | -- All Departments -- | Search...

NAME #	STATUS #	ROLE ID	EMAIL ADDRESS #	DEPARTMENT #	CREATED #	LAST LOGIN #
Coyote	Active	Account Admin	coyote@wile@yahoo.com	Support	03/04/2016 12:04 pm	04/27/2017 5:34 am
Gerald	Active	Admin	gerald@yopmail.com	Support	02/15/2017 11:12 am	03/09/2017 10:07 am
Max	Active	Technician	maelein2016@outlook.com	Support	07/26/2016 11:04 am	07/26/2016 11:18 am
Dagwood	Active	Technician	avantstude@gmail.com	Support	08/01/2016 5:29 am	01/04/2017 9:22 am
Steam Ship	Active	Technician Org 1	sagalla@yahoo.com	Support	07/26/2016 11:04 am	01/10/2017 5:08 am
Gir	Active	Technician Org 1	anb@yahoo.co.in	Support	01/10/2017 6:42 am	

< Prev | 1 | Next >

Sorting the items

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

Filters

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

Column Headers

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

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

2.1.3 My Profile

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

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

Comodo One > Service Desk > Dashboard > My Profile

My Account Profile

Contact Information

Username: ⓘ
coyoteewile@yahoo.com

Person Name:
Coyote

Email Address:
coyoteewile@yahoo.com

Phone Number:
 Ext.

Mobile Number:

Preferences

Profile preferences and settings.

Preferred Language:

Maximum Page Size (per page):

Auto Refresh Rate: ⓘ

Default Signature: ⓘ

Default Paper Size: ⓘ

Show assign tickets ⓘ

Signature

Optional signature used on outgoing emails. ⓘ

Signature is made available as a choice, on ticket reply.

Save Changes
Reset Changes
Cancel Changes

Contact Information

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

Preferences

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

by administrators.

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

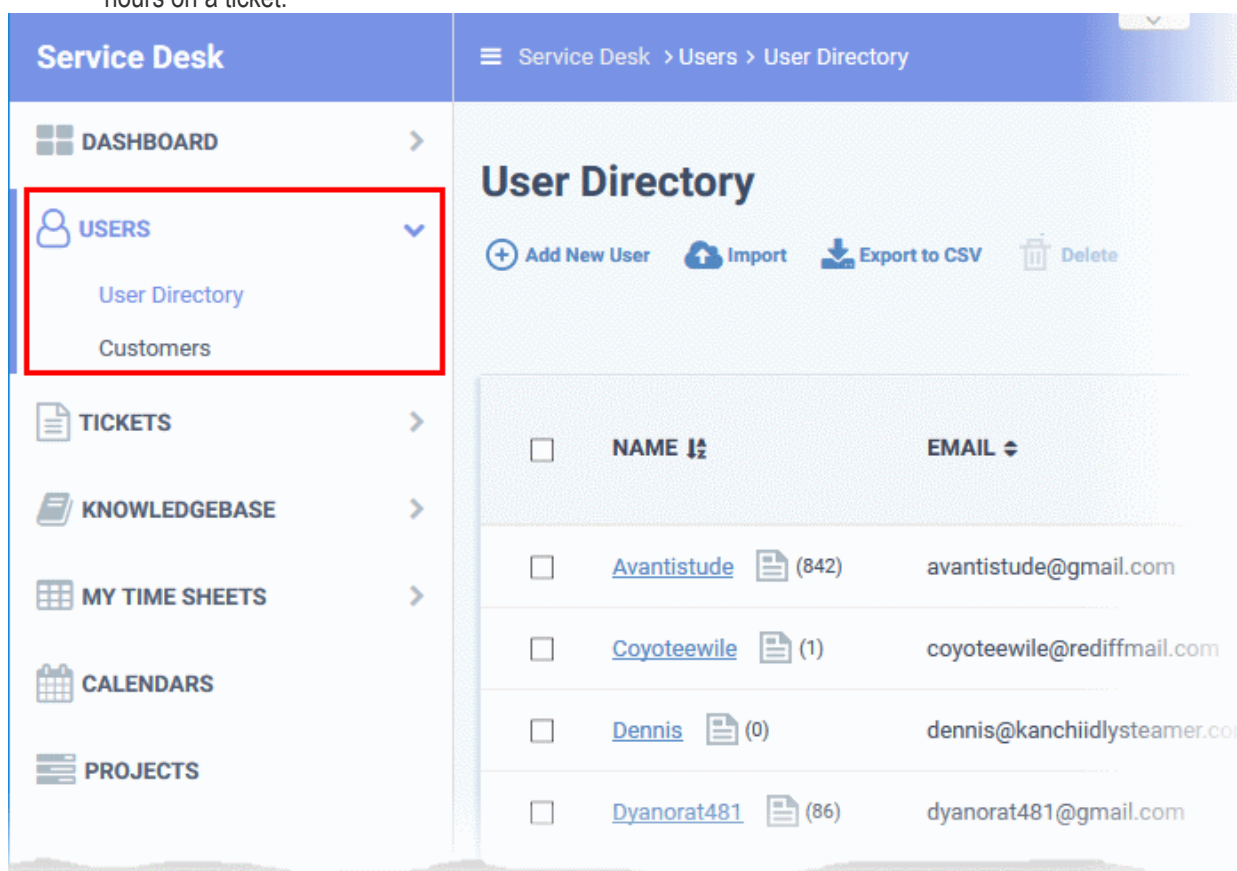
Signature

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

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

2.2 Manage Users and Customers

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



<input type="checkbox"/>	NAME ↕	EMAIL ↕
<input type="checkbox"/>	Avantistude 📄 (842)	avantistude@gmail.com
<input type="checkbox"/>	Coyoteewile 📄 (1)	coyoteewile@rediffmail.com
<input type="checkbox"/>	Dennis 📄 (0)	dennis@kanchiidlysteamer.com
<input type="checkbox"/>	Dyanorat481 📄 (86)	dyanorat481@gmail.com

Click the links below for more details:

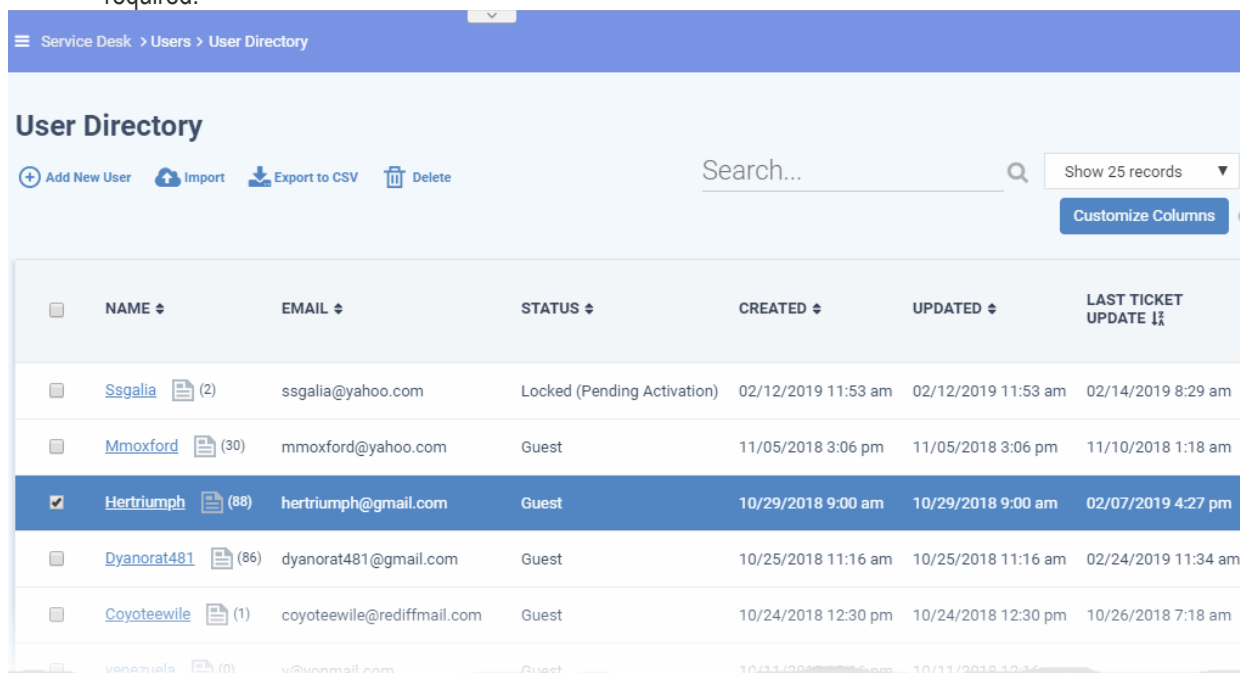
- [Manage Users](#)
- [Manage Customers](#)

2.2.1 Manage Users

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

Manage users

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



	NAME	EMAIL	STATUS	CREATED	UPDATED	LAST TICKET UPDATE
<input type="checkbox"/>	Ssgalia (2)	ssgalia@yahoo.com	Locked (Pending Activation)	02/12/2019 11:53 am	02/12/2019 11:53 am	02/14/2019 8:29 am
<input type="checkbox"/>	Mmoxford (30)	mmoxford@yahoo.com	Guest	11/05/2018 3:06 pm	11/05/2018 3:06 pm	11/10/2018 1:18 am
<input checked="" type="checkbox"/>	Hertriumph (88)	hertriumph@gmail.com	Guest	10/29/2018 9:00 am	10/29/2018 9:00 am	02/07/2019 4:27 pm
<input type="checkbox"/>	Dyanorat481 (86)	dyanorat481@gmail.com	Guest	10/25/2018 11:16 am	10/25/2018 11:16 am	02/24/2019 11:34 am
<input type="checkbox"/>	Coyoteewile (1)	coyoteewile@rediffmail.com	Guest	10/24/2018 12:30 pm	10/24/2018 12:30 pm	10/26/2018 7:18 am
<input type="checkbox"/>	venezuela (0)	v@vopmail.com	Guest	10/11/2018 12:16 pm	10/11/2018 12:16 pm	

Staff can perform the following tasks in the user directory:

- **Add users**
- **Register a user**
- **Edit a user**

- **Delete a user**
 - **Send password reset / activation email to the user**
 - **Manage account access**
 - **Add forms**
 - **Add a user to a customer company**
 - **Manage tickets raised by a user**
 - **Create a new ticket on behalf of a user**
 - **Export users list**
- The user directory shows basic details about each user in six columns. You can add or remove columns by clicking 'Customize Columns'. See **Modify Table Columns** if you need help with this.
 - The following is a list of all possible columns:

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

Add users

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

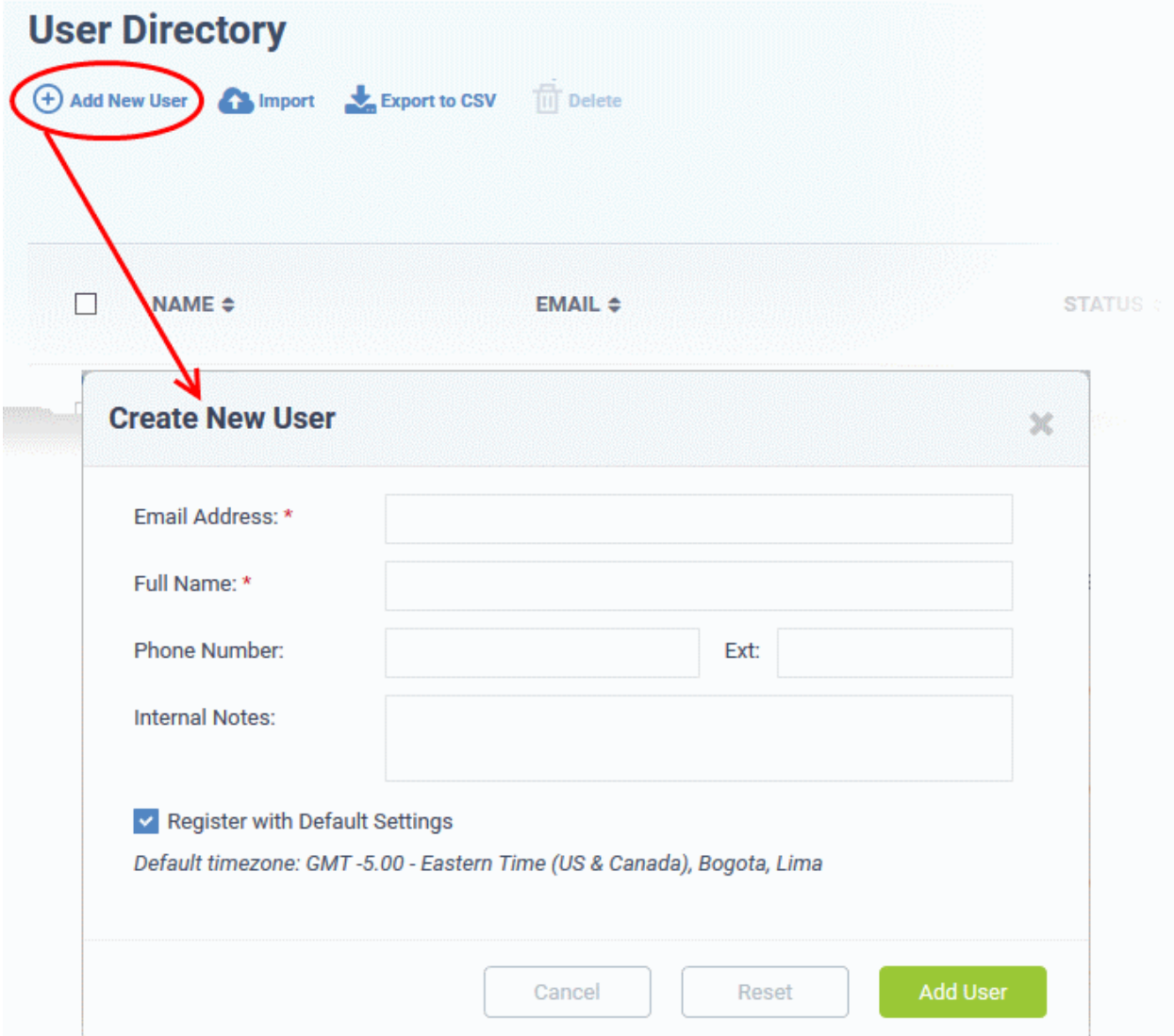
- Once added to service desk, users can be assigned to one of your customers in the 'Customers' screen.

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

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

Manually add a user

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



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

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

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

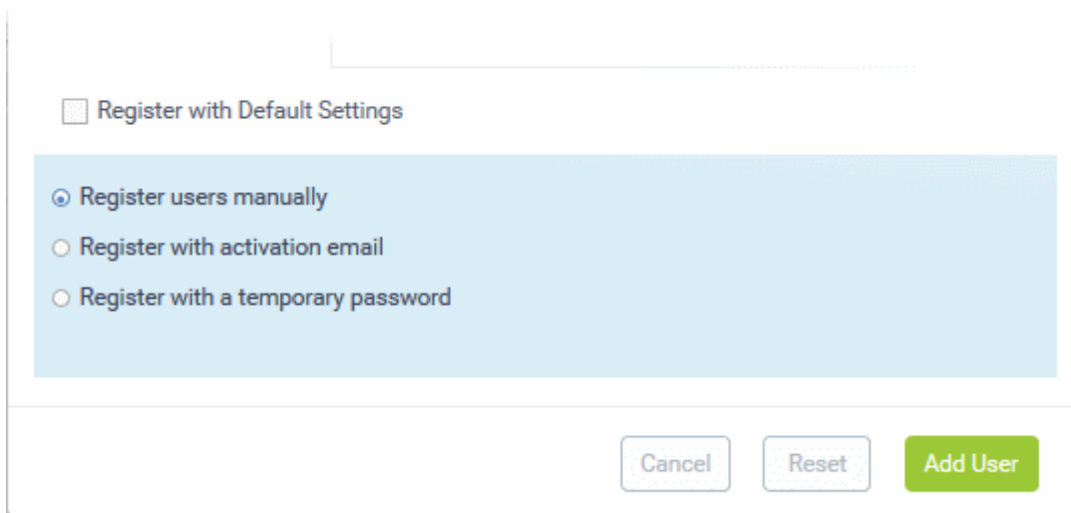
The 'Create New User' screen will open:

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

- **Email Address:** The mail address of the user. The user can login to the your support web portal using the email address as username, after registration.
- **Full Name:** The first name and last name of the user.
- **Phone Number:** The contact number of the user.
- **Internal Notes:** Enter any comments regarding the user.
- **Register with Default Settings:** Select whether the registration should use the settings in 'Admin

Panel' > 'Settings' > 'Users'

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



Register with Default Settings

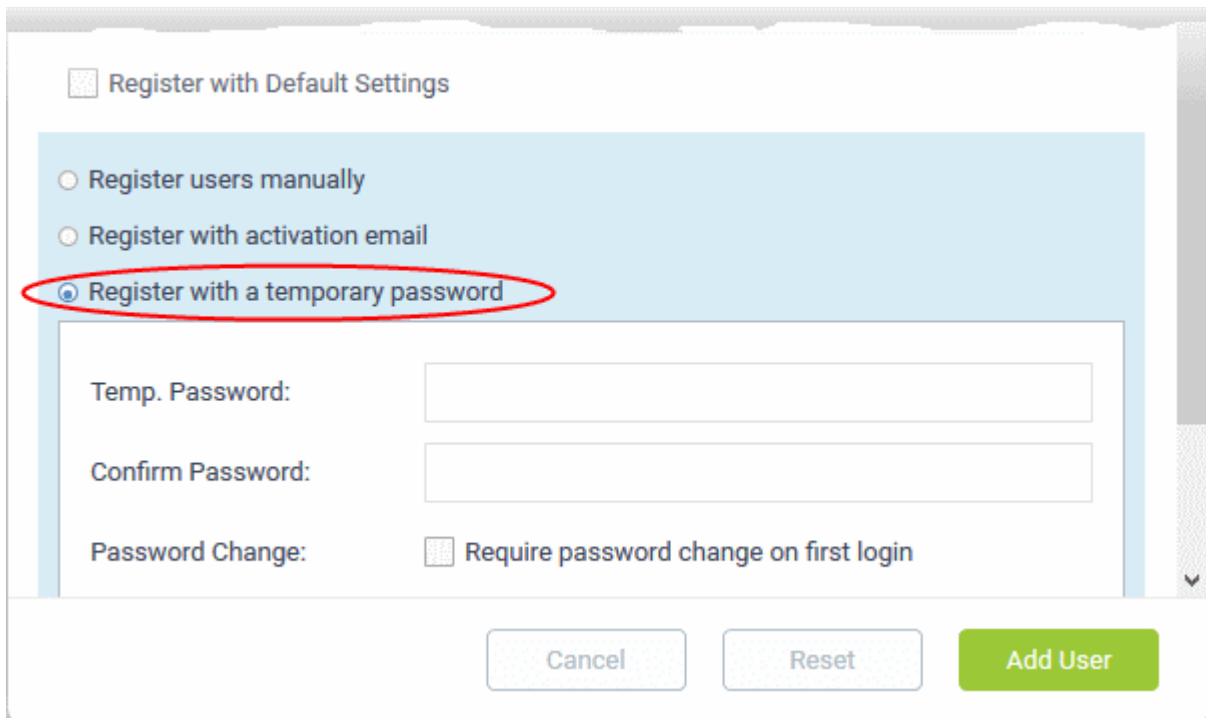
Register users manually

Register with activation email

Register with a temporary password

Cancel Reset Add User

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



Register with Default Settings

Register users manually

Register with activation email

Register with a temporary password

Temp. Password:

Confirm Password:

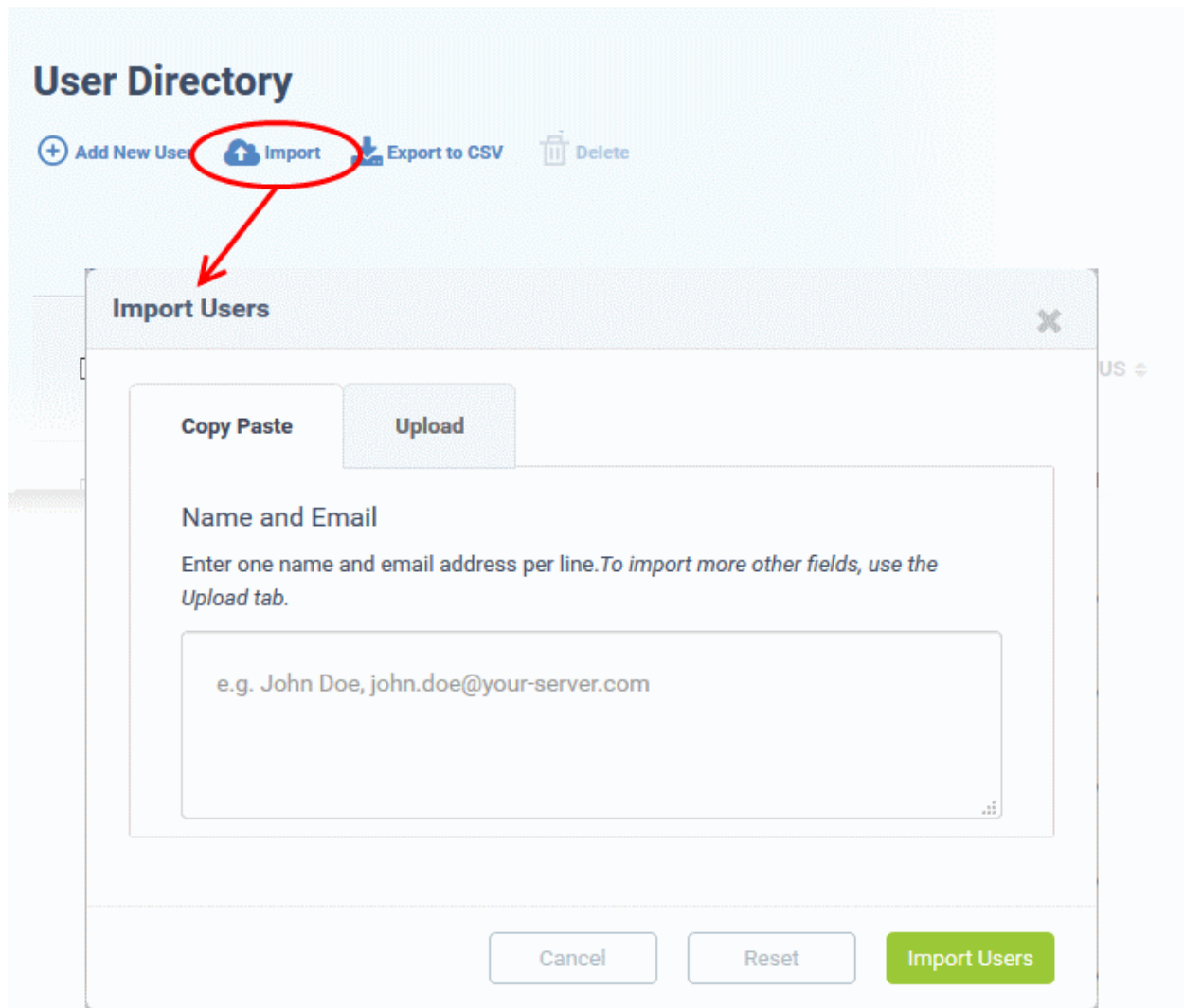
Password Change: Require password change on first login

- Click 'Add User'.

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

Import users

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



There are two ways to import users:

1. **Copy Paste** - Import users with name and email address only.

- Enter the user's full name, followed by a comma, then their email address.
- Add more users in subsequent lines.
- Click 'Import Users' to add the users as guests.

2. **Upload** - Import users from a .csv file. More details can be added about a user with this method.

- Create a .csv file of users that you want to import. The file should have the following column headers:

Email,Name,Phone,Notes,"Customer ID (Optional)
- Each line should contain the contact information of a single user
- Save the .csv, then click 'Browse' to upload the file to Service Desk:

Import Users
✕

Copy Paste

Upload

Import a CSV File

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

[📄 Example CSV File](#)

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

No file selected.

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

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

Register a user

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

Register a guest user

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

The screenshot shows the ITarian user registration interface. At the top right, there are three buttons: 'Delete User', 'Register', and 'More'. The 'Register' button is highlighted with a red circle. A red arrow points from this button to a modal window titled 'Register: Cyclist'. The modal window contains the following information:

- Status :** Guest
- Created :** 06/11/2018 2:35 pm
- Updated :** 06/11/2018 2:35 pm

Register: Cyclist

Complete the form below to create a user account for Cyclist .

User Account Login

Authentication Sources:

Username:

Status:

- Send account activation email to raleighallsteel@gmail.com
- Register with a temporary password

User Preferences

Time Zone:

Buttons:

The user registration screen will open:

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

Activation can be done in two ways:

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

User Account Activation through Activation Email

- Select 'Send account activation email...'

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

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

SUPPORT CENTER

Support Ticket System

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

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

Manage Your Profile Information

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

Contact Information

Email Address: *

Full Name: *

Phone Number: Ext:

Preferences

Time Zone: ▼

Access Credentials

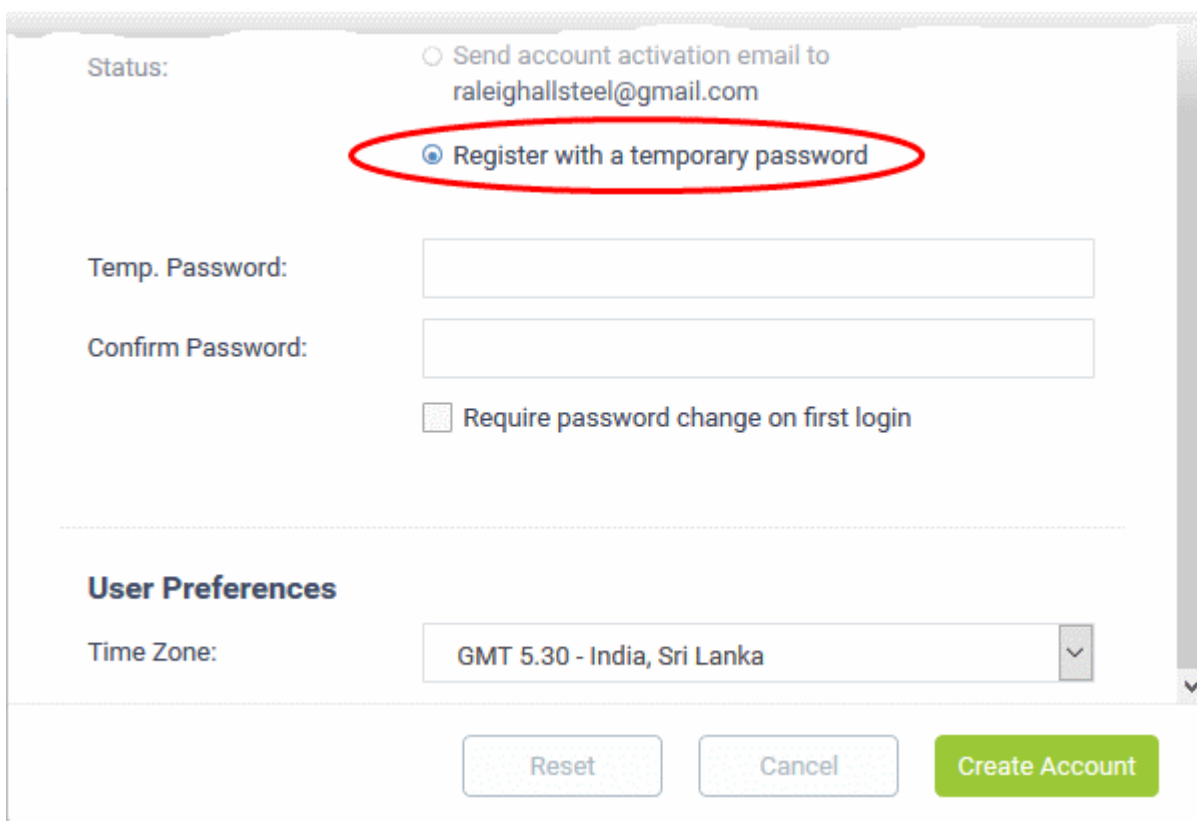
Current Password:

New Password:

Confirm New Password:

User Account Activation using a temporary password

- Select 'Register with a temporary password'



Status:

Send account activation email to raleighhallsteel@gmail.com

Register with a temporary password

Temp. Password:

Confirm Password:

Require password change on first login

User Preferences

Time Zone:

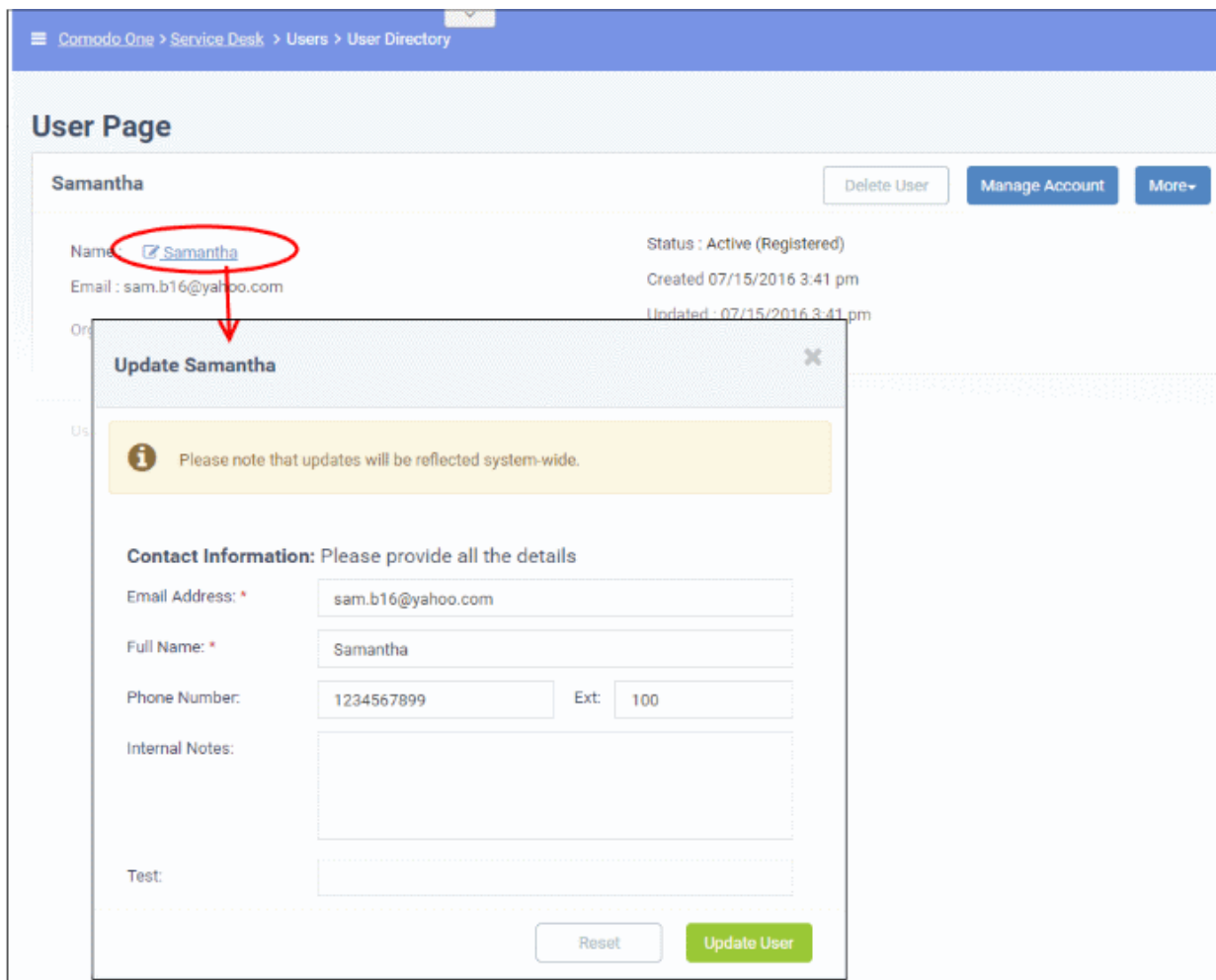
- Enter a temporary password and re-enter it in the respective fields
- Select 'Require password change on first login' if you want the user to reset their password on their first login
- **Timezone** - Select the time zone to which the user belongs
- Click 'Create Account'

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

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

Edit a user

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



The screenshot shows the 'User Page' for a user named Samantha. The user's name is circled in red, and a red arrow points to the 'Update Samantha' dialog box. The dialog box contains the following information:

- Name:** Samantha (circled in red)
- Email:** sam.b16@yahoo.com
- Status:** Active (Registered)
- Created:** 07/15/2016 3:41 pm
- Updated:** 07/15/2016 3:41 pm

The 'Update Samantha' dialog box includes a warning message: "Please note that updates will be reflected system-wide." Below this, there is a section for 'Contact Information' with the following fields:

- Email Address:** sam.b16@yahoo.com
- Full Name:** Samantha
- Phone Number:** 1234567899
- Ext:** 100
- Internal Notes:** (empty text area)
- Test:** (empty text area)

Buttons for 'Reset' and 'Update User' are located at the bottom of the dialog box.

The 'Update User' screen will be displayed.

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

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

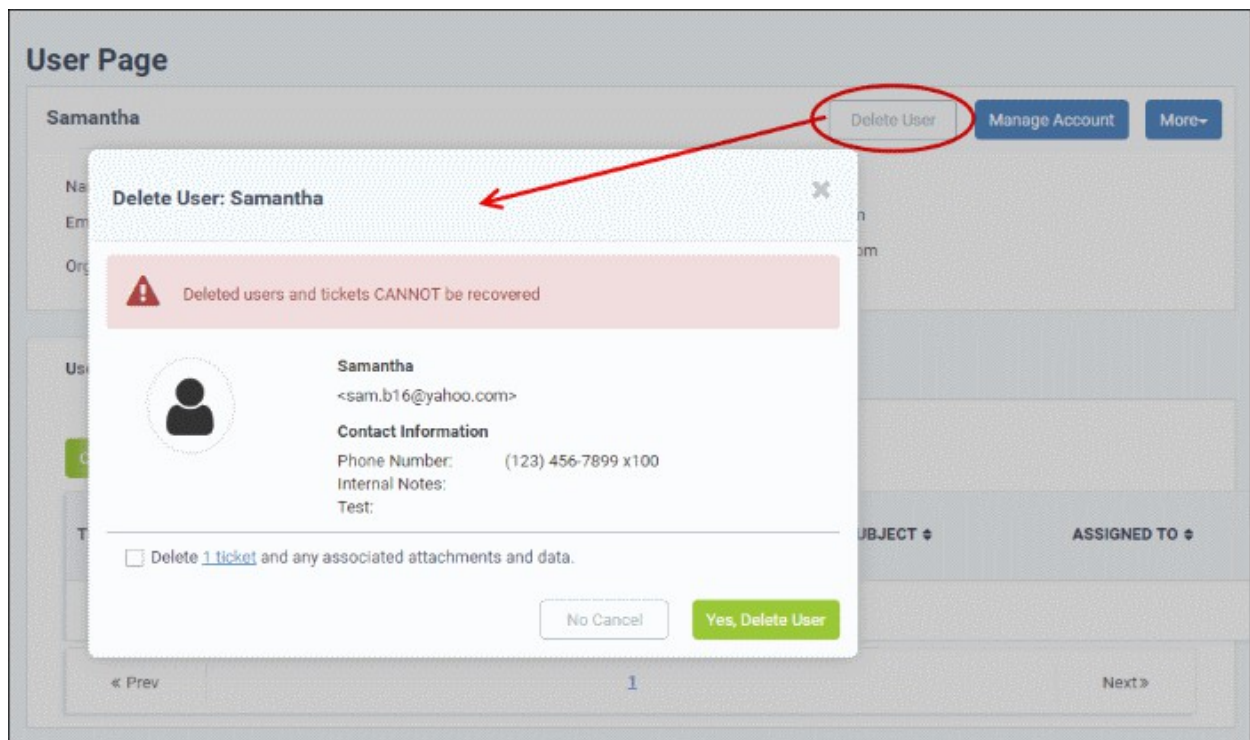
Delete a user

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

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

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

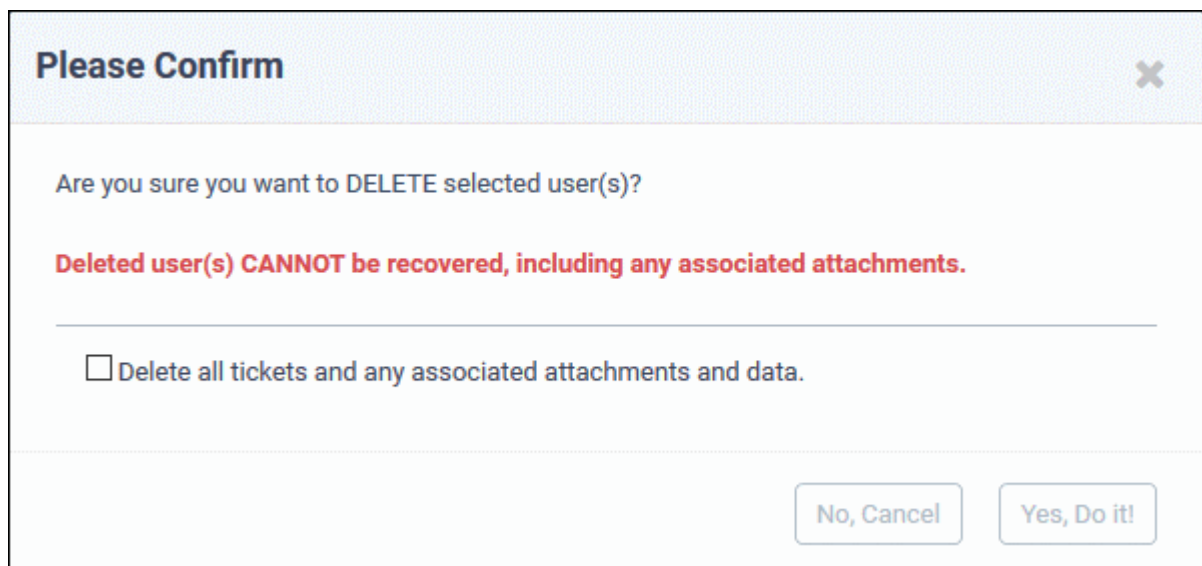
Note: You cannot remove a user who still has tickets associated with them.



- Click 'Yes, Delete User'

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

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



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

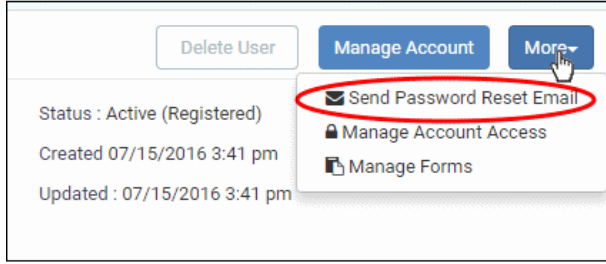
Send password reset / activation email to the user

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

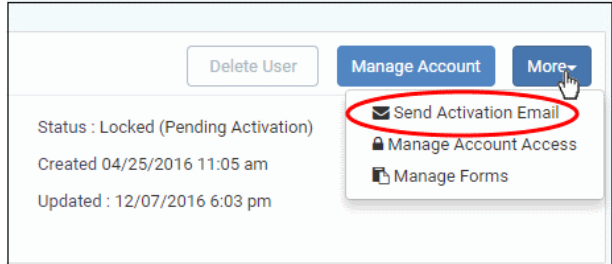
- Click 'Staff Panel' (if required) > 'Users' > 'User Directory'

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

Registered Users



Locked (Pending Activation) Users



To reset a password

- Click the 'Send Password Reset Email' link

Please Confirm ✕

Are you sure want to send **Password Reset Link** to sumeetdomestic@gmail.com?

Please confirm to continue.

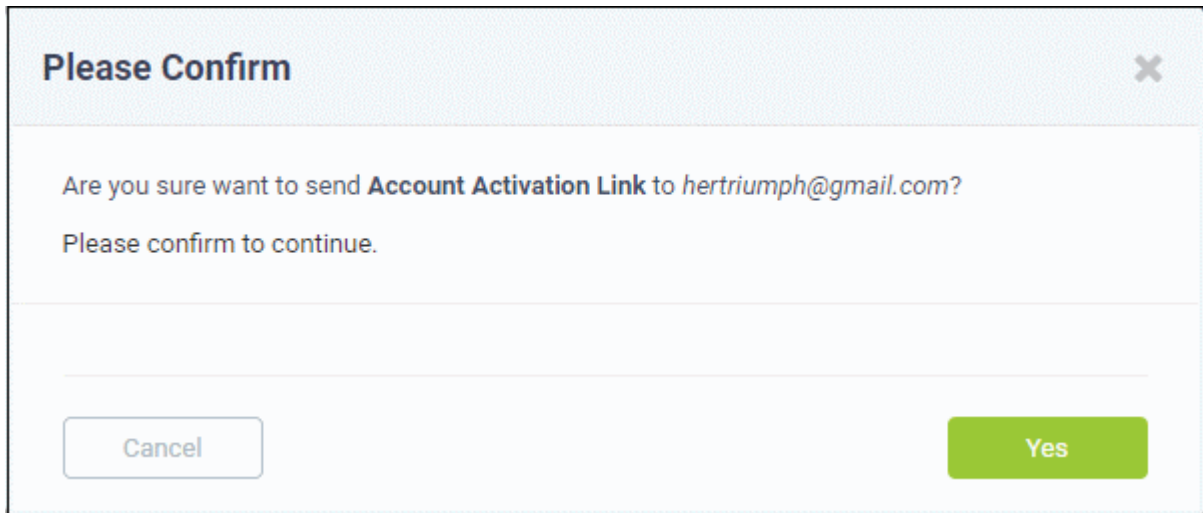
Cancel
Yes

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

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

To activate a user

- Click the 'Send Password Reset Email' link



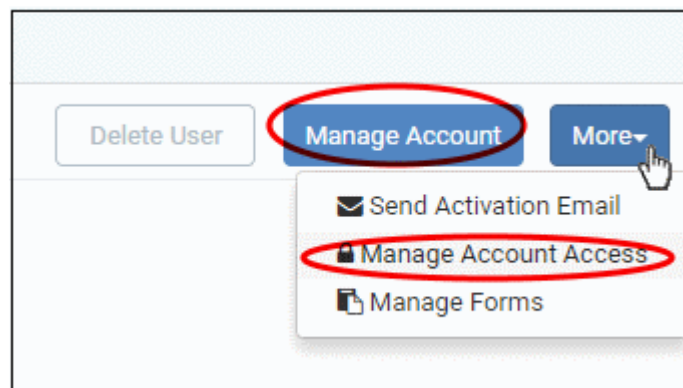
- Click 'Yes' to confirm and send the activation mail.

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

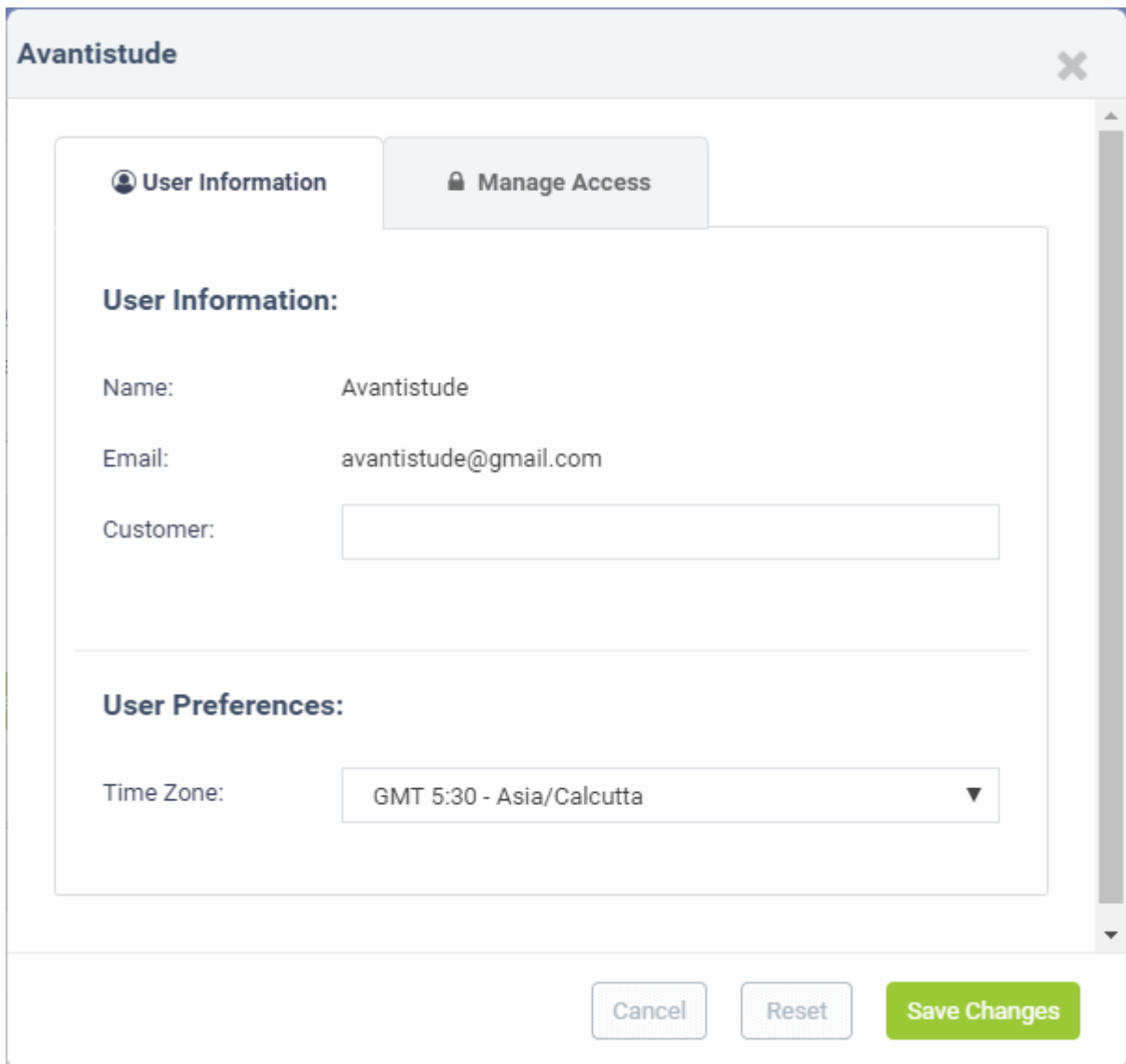
Manage account access / User Information

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

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



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



Avantistude

User Information | **Manage Access**

User Information:

Name: Avantistude

Email: avantistude@gmail.com

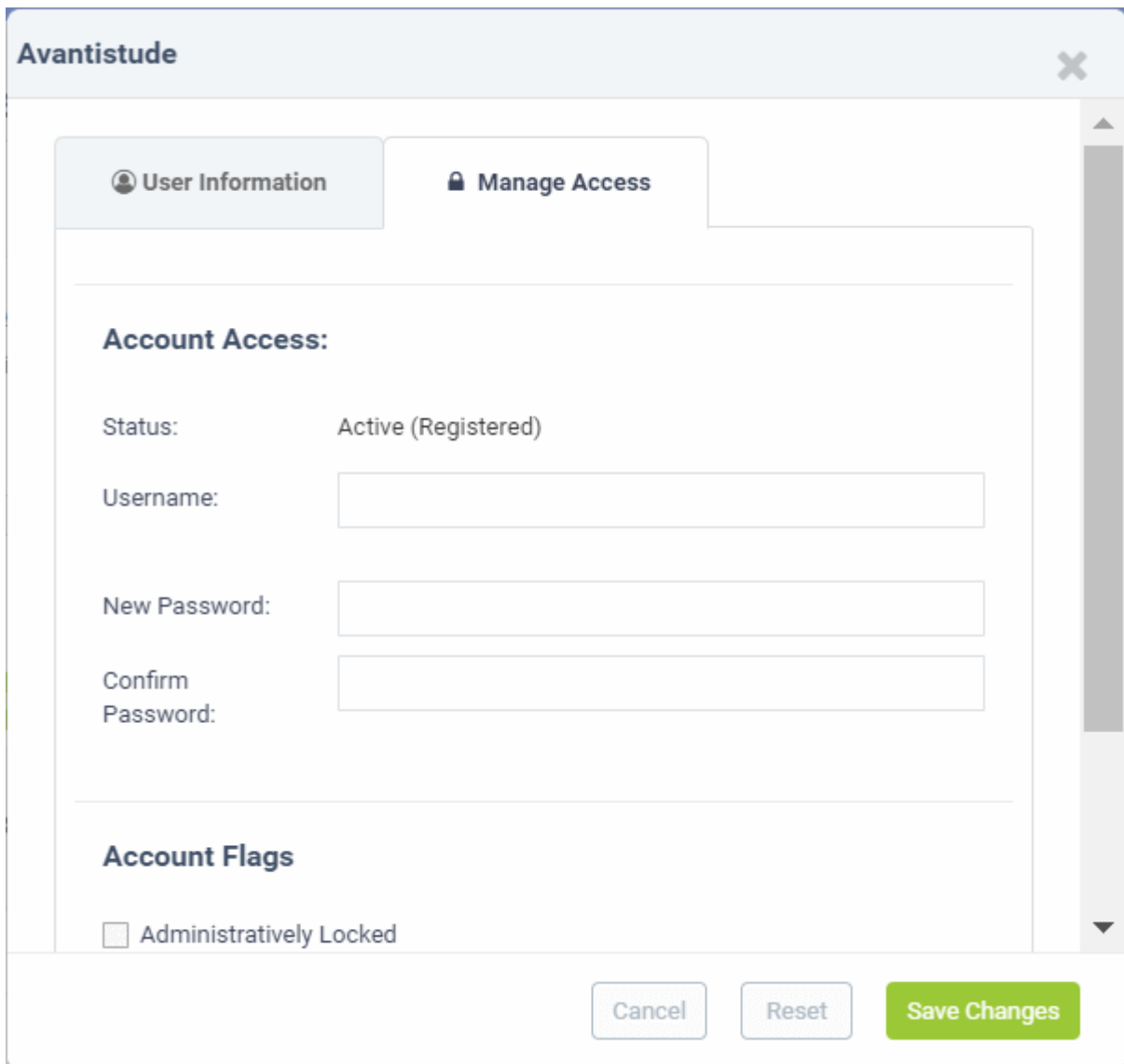
Customer:

User Preferences:

Time Zone: GMT 5:30 - Asia/Calcutta ▼

Cancel | Reset | Save Changes

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



Account Access

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

Account Flags

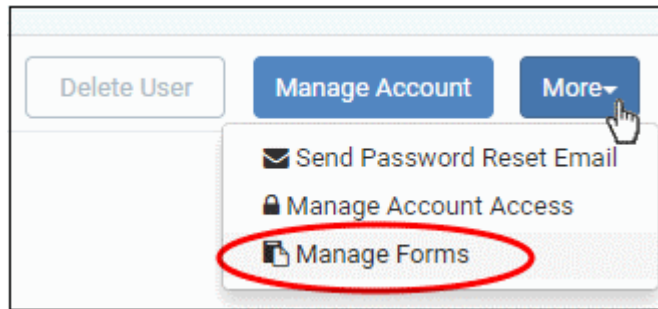
- **Administratively Locked:** If enabled, the user cannot access the web portal. However, the user can raise tickets via email.
- **Password Reset Required:** If enabled, a reset password screen will be displayed when the user logs into the web portal.
- **User Cannot Change Password:** If enabled,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

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

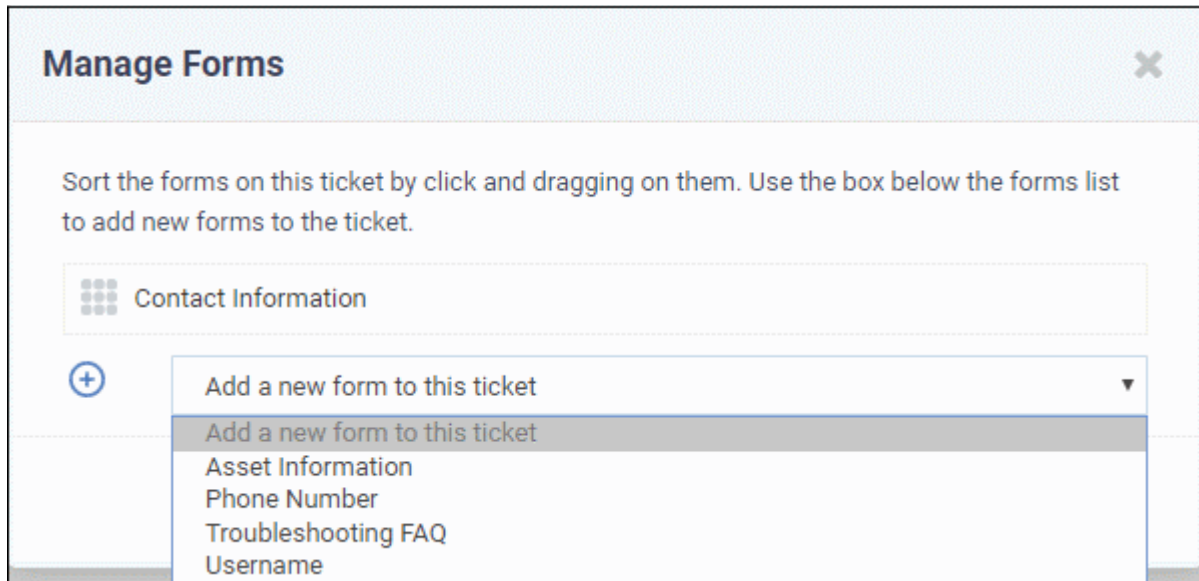
Add forms

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

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



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



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

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

Update Samantha ✕

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

Contact Information: Please provide all the details


Email Address: *

Full Name: *

Phone Number: Ext:

Internal Notes:

Test:



Troubleshooting FAQ:

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

Manage Forms ✕

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

☰ Contact Information

☰ Troubleshooting FAQ 🗑️

☰ Asset Information 🗑️

+

Reset
Cancel
Save Changes

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

Add a user to a customer company

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

Login to ITarian > Click 'Management' > 'Customers' > 'New Customer'

See [Manage Customers](#) if you'd like more help with this.

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

Add a user to a company

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

The screenshot shows the 'User Page' for Alexander Dagwood. The user's details are as follows:

Name : Alexander Dagwood	Status : Locked (Pending)
Email : hertriumph@gmail.com	Created : 04/25/2016 1
Customer : Add Customer	Updated : 02/25/2019 :

The 'Add Customer' link is circled in red. A modal dialog titled 'Customer for Alexander Dagwood' is open, showing a search field for existing customers and a form to create a new customer. The form fields are:

- Name: *
- Web Domain: *
- Address:
- Phone: (with Ext. field)
- Website:
- Internal Notes:

Buttons at the bottom of the modal are 'Cancel', 'Reset', and 'Add Customer'.


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

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

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

Customer for Alexander Dagwood ✕

i Search existing customers.

 **Dithers Construction Company**

Customer Information

Web Domain: dithercons.com

Address:

Phone:

Website:

[Continue](#)

- Click 'Continue'.

The user will be added to the customer.

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

Customer for Alexander Dagwood ✕

i Search existing customers.

Create New Customer: Details on customer.

Name: *

Web Domain: *

Address:

Phone: Ext:

Website:

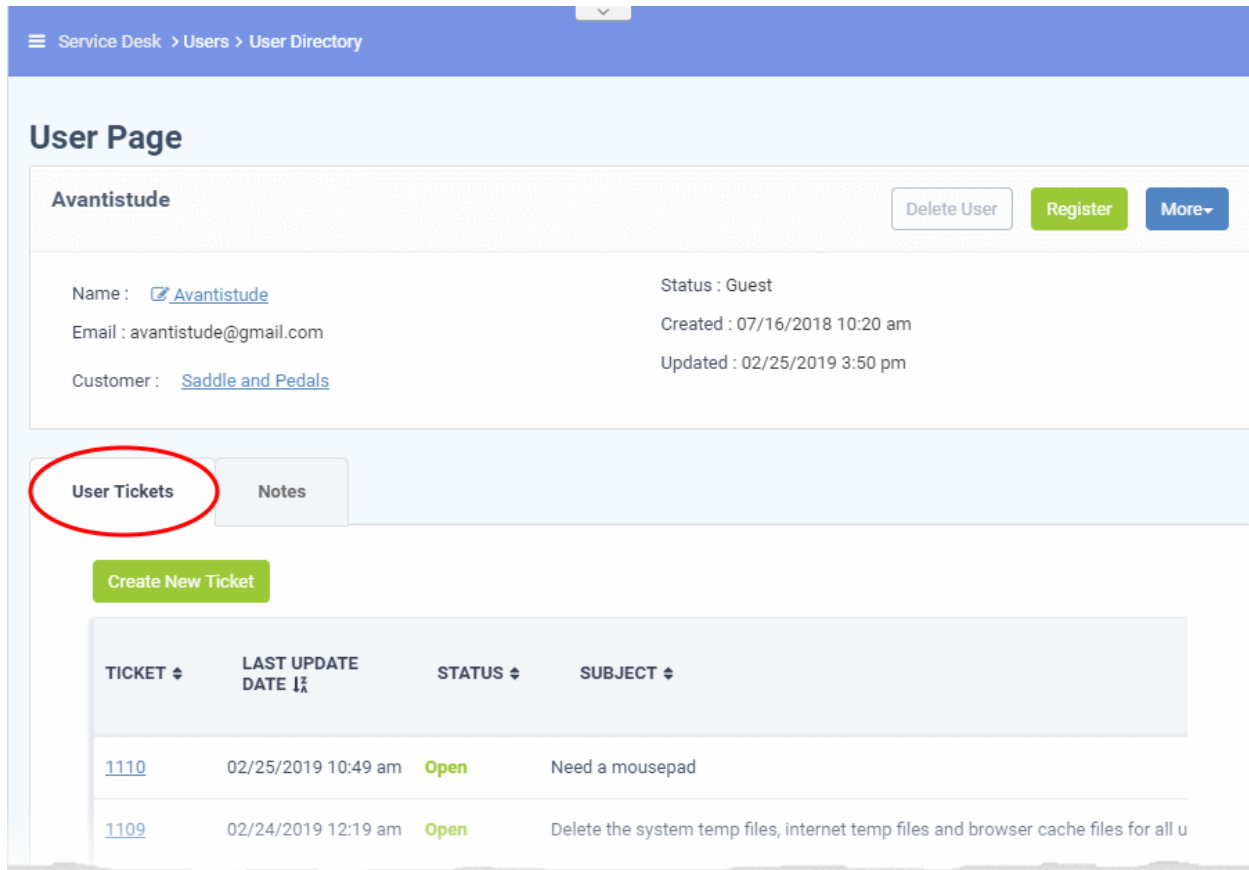
Internal Notes:

- See [Manage Customers](#) if you need help to create a new customer.

Manage tickets raised by a user

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

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



Service Desk > Users > User Directory

User Page

Avantistude Delete User Register More

Name : [Avantistude](#) Status : Guest
 Email : avantistude@gmail.com Created : 07/16/2018 10:20 am
 Customer : [Saddle and Pedals](#) Updated : 02/25/2019 3:50 pm

User Tickets Notes

Create New Ticket

TICKET	LAST UPDATE DATE	STATUS	SUBJECT
1110	02/25/2019 10:49 am	Open	Need a mousepad
1109	02/24/2019 12:19 am	Open	Delete the system temp files, internet temp files and browser cache files for all u

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

Column Headers

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

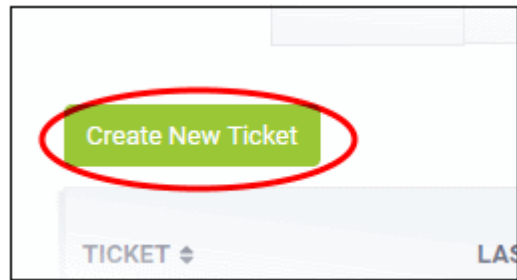
The ticket preview allows staff members to view the details and the links at the bottom to manage it. See **Ticket Details** for more details.

Create new ticket on behalf of a user

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

To create a ticket on behalf of a user:

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



The 'Open New Ticket' screen will open:

Open New Ticket

New Ticket

User Information:

Search User:

Create new user

Email Address: *

Full Name: *

Phone Number: Ext:

Internal Notes:

Ticket Notice: Send alert to user.

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

Export users list to a CSV file

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

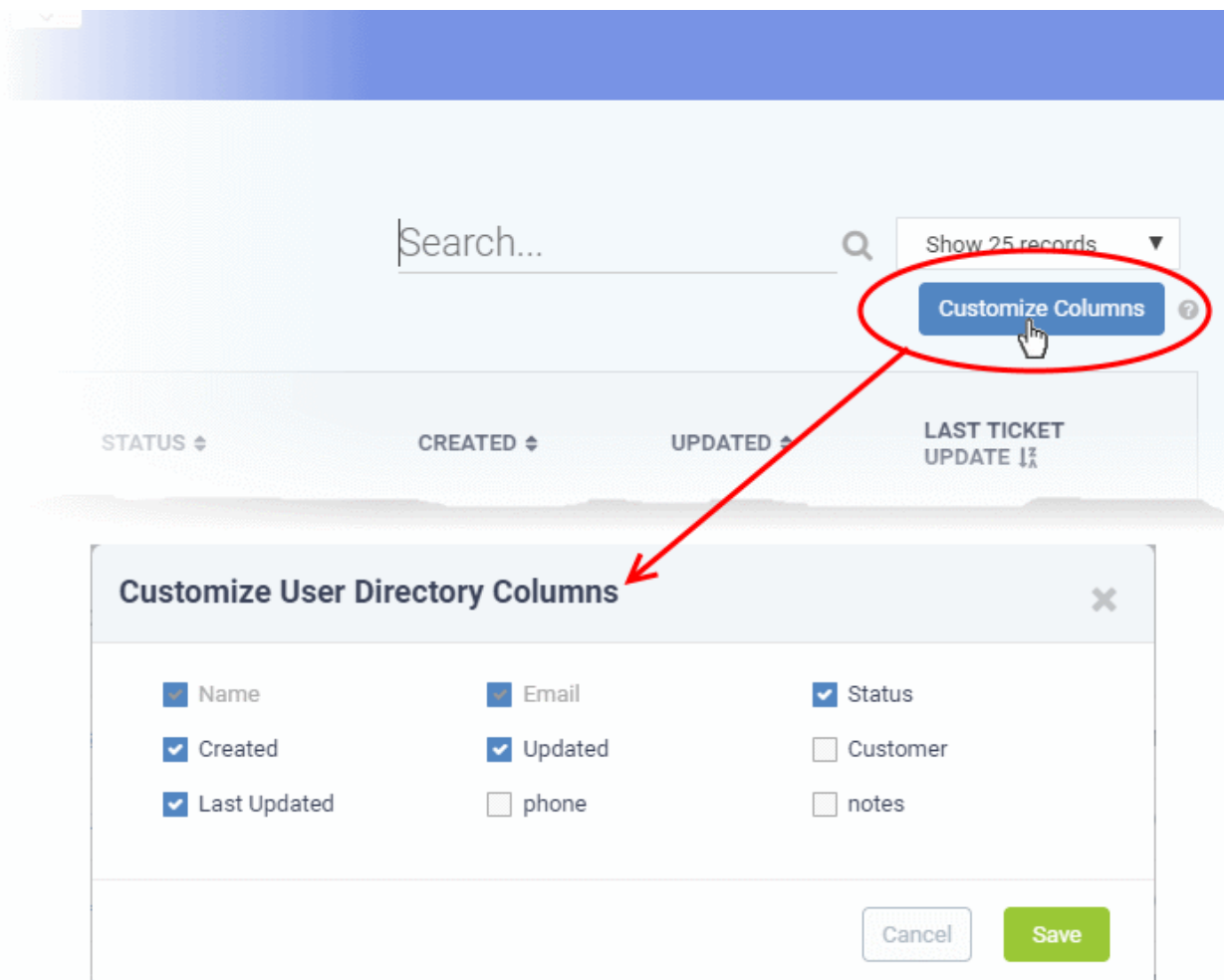


The file be downloaded and can be opened with applications such as Excel or Open Office Calc.

Modify Table Columns

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

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



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

Note: Mandatory columns appear gray and cannot be disabled.

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

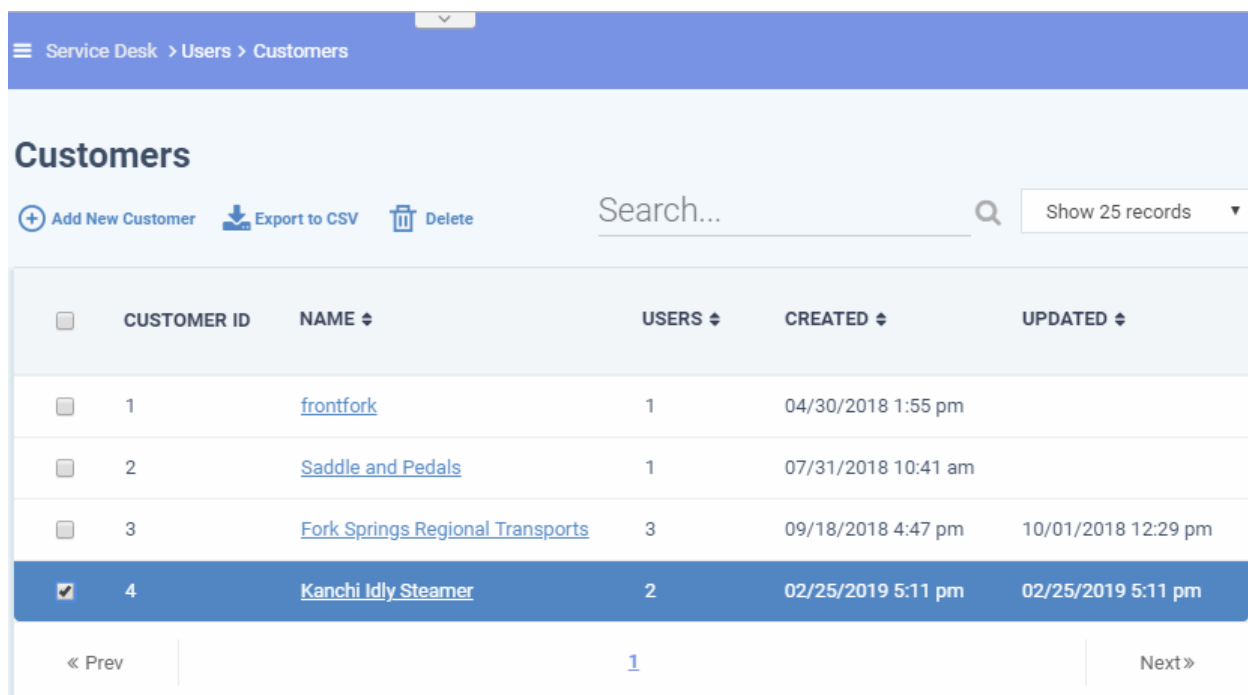
2.2.2 Manage Customers

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

Notes

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

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



The screenshot shows the 'Customers' interface in ITarian. At the top, there is a breadcrumb trail: 'Service Desk > Users > Customers'. Below this, the title 'Customers' is displayed. There are three action buttons: 'Add New Customer' (with a plus icon), 'Export to CSV' (with a download icon), and 'Delete' (with a trash icon). A search bar is present with the text 'Search...'. To the right of the search bar is a dropdown menu showing 'Show 25 records'. Below these elements is a table with the following columns: 'CUSTOMER ID', 'NAME', 'USERS', 'CREATED', and 'UPDATED'. The table contains four rows of data. The first row has ID 1, name 'frontfork', 1 user, and was created on 04/30/2018 at 1:55 pm. The second row has ID 2, name 'Saddle and Pedals', 1 user, and was created on 07/31/2018 at 10:41 am. The third row has ID 3, name 'Fork Springs Regional Transports', 3 users, and was created on 09/18/2018 at 4:47 pm, with an update on 10/01/2018 at 12:29 pm. The fourth row has ID 4, name 'Kanchi Idly Steamer', 2 users, and was created on 02/25/2019 at 5:11 pm, with an update on 02/25/2019 at 5:11 pm. This row is highlighted in blue. At the bottom of the table, there are navigation controls: '<< Prev', a page number '1', and 'Next >>'.

<input type="checkbox"/>	CUSTOMER ID	NAME ↕	USERS ↕	CREATED ↕	UPDATED ↕
<input type="checkbox"/>	1	frontfork	1	04/30/2018 1:55 pm	
<input type="checkbox"/>	2	Saddle and Pedals	1	07/31/2018 10:41 am	
<input type="checkbox"/>	3	Fork Springs Regional Transports	3	09/18/2018 4:47 pm	10/01/2018 12:29 pm
<input checked="" type="checkbox"/>	4	Kanchi Idly Steamer	2	02/25/2019 5:11 pm	02/25/2019 5:11 pm

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

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

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

Customers interface - Table of Column Descriptions	
Column Header	Description
Customer ID	The identity number assigned to the customer by Service Desk.
Name	<p>The organization or company that is your customer.</p> <ul style="list-style-type: none"> • Click the name of a customer to open their details interface. • From this interface you can: <ul style="list-style-type: none"> • Manage details of the customer • Add and manage users of the customer • Manage forms for the customer • View and manage tickets • Manage notes • View service contracts of the customer
Users	Number of Service Desk users added to the customer company.
Created	The date on which the customer was added to Service Desk.
Updated	Date and time at which the customer details were most recently updated.

Sorting items

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

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

Search Options

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

Add a Customer

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

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

Add a customer

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

Service Desk > Users > Customers

Customers

+ Add New Customer
Export to CSV
Delete
Search...

CUSTOMER ID	NAME	USERS	CREATED
1	frontfork	1	04/30/2018 1:55 pm

Add New Customer

Complete the form below to add a new customer.

Create New Customer: Details on customer.

Name: *

Web Domain: *

Address:

Phone: Ext:

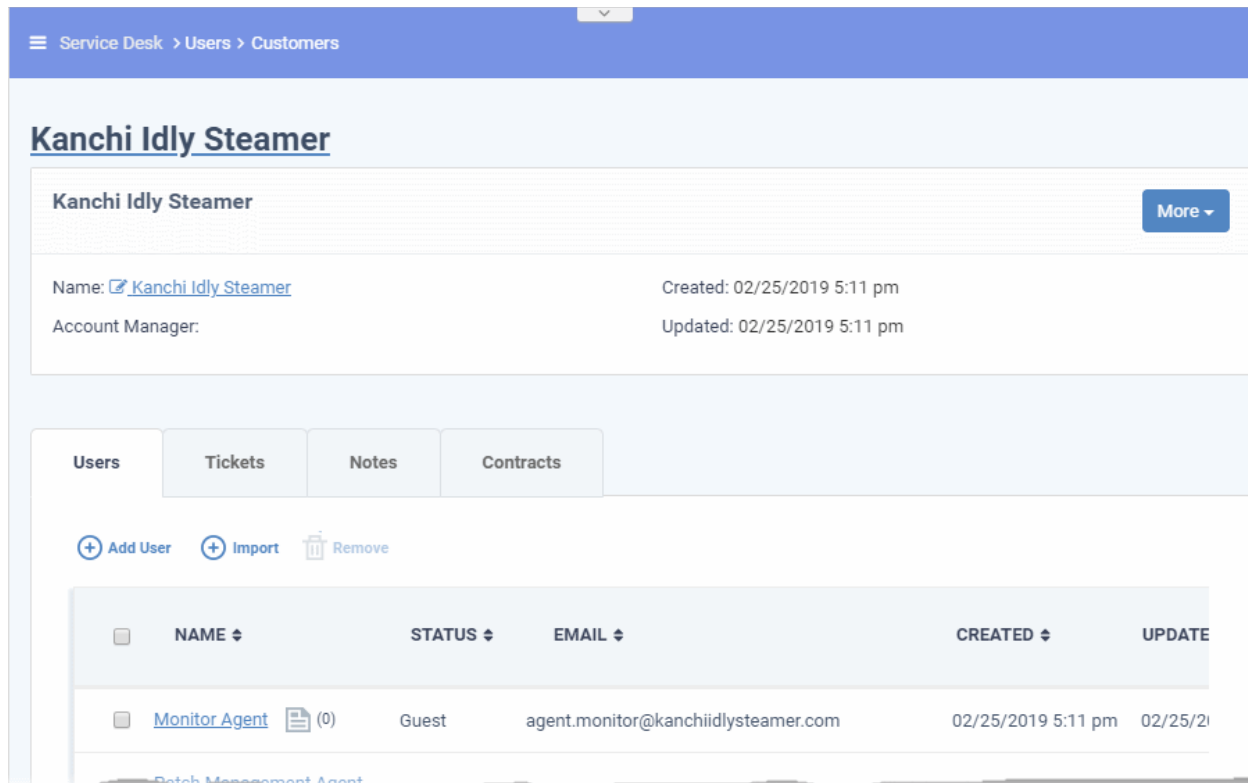
Website:

Internal Notes:

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

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

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



Service Desk > Users > Customers

Kanchi Idly Steamer

Kanchi Idly Steamer More ▾

Name: [Kanchi idly Steamer](#) Created: 02/25/2019 5:11 pm
 Account Manager: Updated: 02/25/2019 5:11 pm

Users Tickets Notes Contracts

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

NAME	STATUS	EMAIL	CREATED	UPDATE
Monitor Agent (0)	Guest	agent.monitor@kanchiidlysteamer.com	02/25/2019 5:11 pm	02/25/21

[Patch Management Agent](#)

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 ITarian modules.

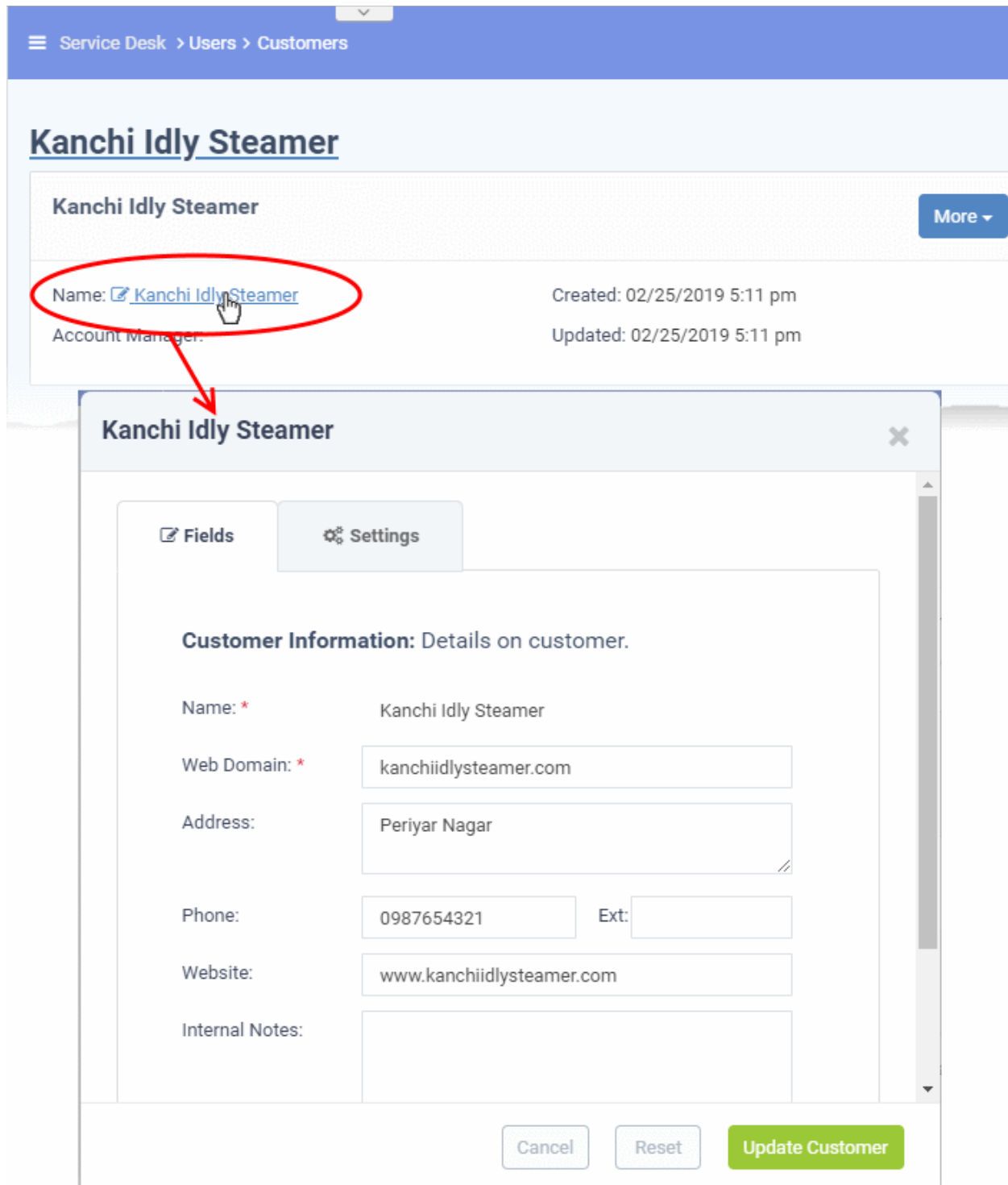
- Background. ITarian contains several modules that help IT managers to keep their organization's computers running smoothly. Two of these modules, Endpoint Manager and Patch Management, are capable of automatically sending tickets to Service Desk via API. See **API Keys** in Service Desk admin guide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

Manage Customer Details

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

To view and manage details of a customer

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



The screenshot shows the Service Desk interface. At the top, the breadcrumb navigation reads 'Service Desk > Users > Customers'. Below this, the customer profile for 'Kanchi Idly Steamer' is displayed. The profile includes a 'Name' field with a pencil icon and the text 'Kanchi Idly Steamer', which is circled in red. A red arrow points from this field to a configuration window titled 'Kanchi Idly Steamer'. The configuration window has two tabs: 'Fields' (selected) and 'Settings'. Under the 'Fields' tab, there is a section titled 'Customer Information: Details on customer.' with the following fields:

- Name: * Kanchi Idly Steamer
- Web Domain: * kanchiidlysteamer.com
- Address: Periyar Nagar
- Phone: 0987654321 Ext:
- Website: www.kanchiidlysteamer.com
- Internal Notes:

At the bottom of the configuration window, there are three buttons: 'Cancel', 'Reset', and 'Update Customer'.

The configuration interface has two tabs:

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

The 'Fields' tab

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

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

Kanchi Idly Steamer

Fields
Settings
✕

Customer Information: Details on customer.

Name: *

Web Domain: *

Address:

Phone: Ext:

Website:

Internal Notes:

Cancel
Reset
Update Customer

The 'Fields' tab - Form Parameters	
Parameter	Description
Name	The organization or the company added as customer to service desk. You cannot edit the name from here.
Web Domain	<p>The domain used for email by your customer.</p> <ul style="list-style-type: none"> Service Desk creates two new users 'Monitor Agent' and 'Patch Management Agent' with email addresses in this domain. These user accounts are used to receive automatically generated tickets from Endpoint Manager. They are also used to assign to your customer any guests who submit tickets from an email address at this domain. <p>You can change the domain name if required</p>
Address and Phone	The contact details of the customer. You can change these details as required.
Website	The URL of the company's website. You can change the website details if required.
Internal Notes	Enter any notes regarding the customer.

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

- Edit the details as required.

The 'Settings' tab

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

	customer. The 'Default Outgoing Email Address' drop-down shows addresses from the 'Available Outgoing Email Address' field.
Account Manager	The drop-down shows all admins and staff added to service desk. Choose the account manager responsible for the customer.
Auto Assignment	Choose whether or not tickets created by users of the customer are automatically assigned to the account manager.
Primary Contacts	Select the person with whom your staff can liaise on issues.
Automated Collaborations	Collaborators receive copies of all communications between staff and users during the progress of a ticket. Collaborators can respond to communications. <ul style="list-style-type: none"> Primary Contacts - All primary contacts selected in the 'Primary Contacts' will be added as collaborators for the tickets pertaining to the customer. Customer Members - All users in the customer company will be added as collaborators for the tickets pertaining to the customer.
Main Domain: Auto Add Members From:	Specify the domains from which guest users can be imported for the customer. Guests are auto-assigned to the customer if the email address they used to submit a ticket matches any domain in this field.

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

Manage users of a customer company

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

Add users to a customer

- There are two places you can add users to a customer:
 - 1 The 'User Directory'
 - Click 'Staff Panel' > 'Users' > 'User Directory'
 - Click on a customer name to open their details
 - Click 'Add Customer'
 - See **'Add a user to a customer company'** in **'Manage Users'** if you need more help with this
 - 2 The 'Customers' area
 - Click 'Staff Panel' > 'Users' > 'Customers'
 - Click on a customer name
 - Open the 'Users' tab and click 'Add User'
 - Alternatively, click 'Import' to import users from a .csv file

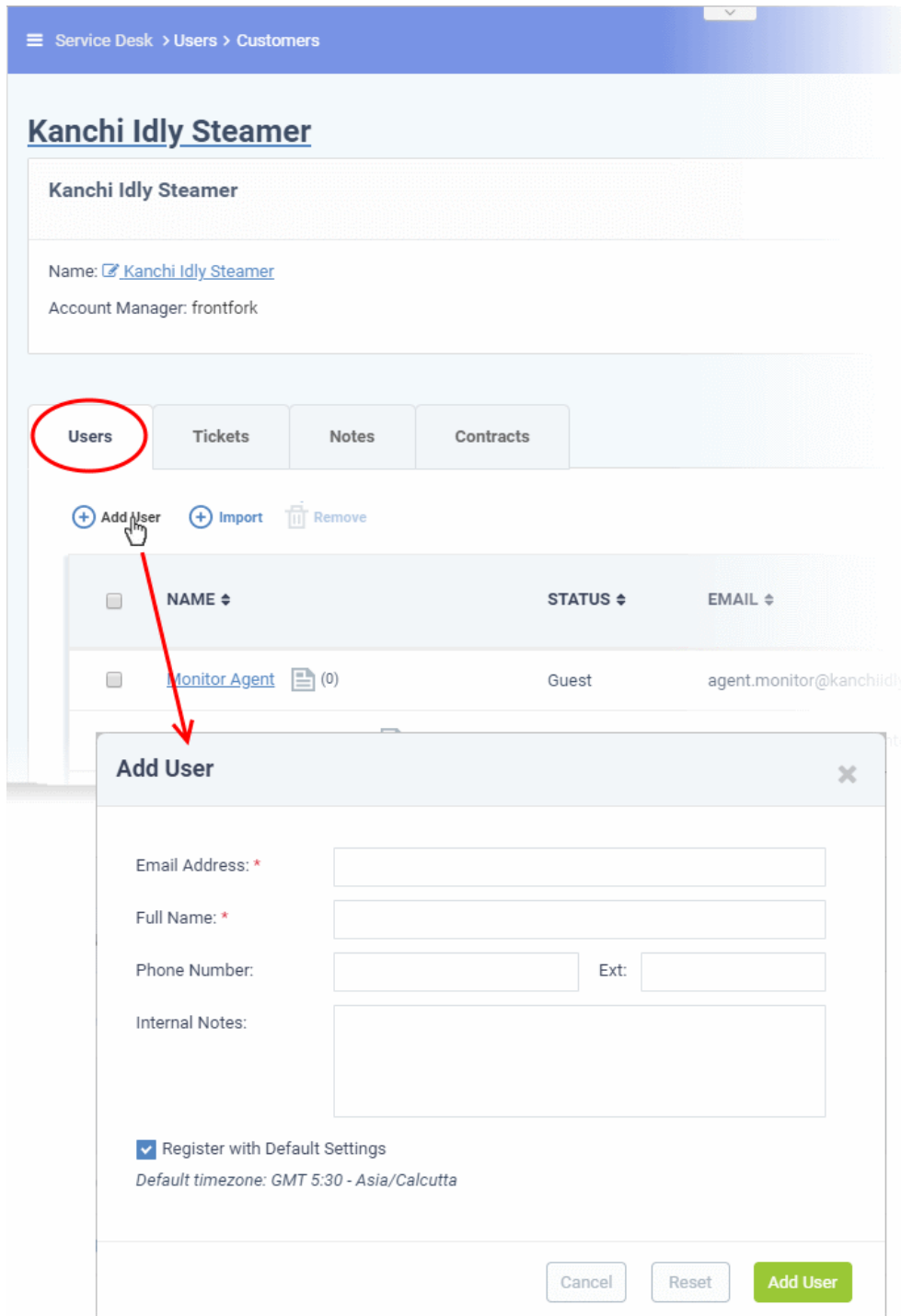
The rest of this section explains option 2 above in more detail.

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

Manually add users to a customer

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

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



Service Desk > Users > Customers

Kanchi Idly Steamer

Kanchi Idly Steamer

Name: [Kanchi Idly Steamer](#)

Account Manager: frontfork

Users Tickets Notes Contracts

+ Add User + Import Remove

	NAME	STATUS	EMAIL
<input type="checkbox"/>	Monitor Agent (0)	Guest	agent.monitor@kanchiidly-

Add User

Email Address: *

Full Name: *

Phone Number: Ext:

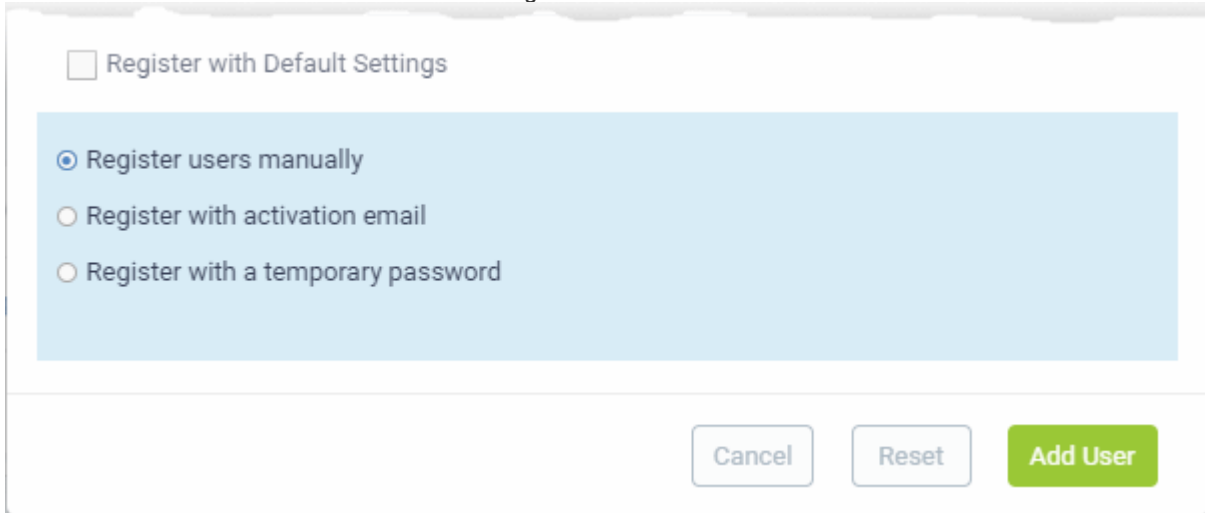
Internal Notes:

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

Cancel Reset **Add User**

- **Tip.** You can configure the fields in the form above in 'Admin Panel' > 'Manage' > 'Forms' > 'Contact Information'. See 'Forms' in Service Desk admin guide if you want more help with this.
- Complete the details of the new user.
 - **Email Address:** Contact mail address. This doubles-up as their username to login to your support portal.
 - **Full Name:** First name and last name of the user.
 - **Phone Number:** The contact number of the user.
 - **Internal Notes:** Enter any comments about the user.

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



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

The link leads to your support web portal where the user will create a password and so register their account. After registration, the user can login and manage/view their tickets.

- **Register with a temporary password** - Create a temporary account password which registers the user immediately.

You need to send the password and URL of your support portal to the user. This allows them to login and manage their tickets.

- 'Require password change on first login' - Enable to force the user to create a new password after first login (recommended).
- Default User Timezone - Select the time zone to which the user belongs from the drop-down
- Click 'Add User'. The user will be added to service desk and assigned to the customer company.
- Repeat the process to add more users

Import users of a customer company

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

Service Desk > Users > Customers

Kanchi Idly Steamer

Kanchi Idly Steamer

Name: [Kanchi Idly Steamer](#)

Account Manager: frontfork

Users Tickets Notes Contracts

+ Add User + Import Remove

NAME	STATUS	EMAIL
Monitor Agent (0)	Guest	agent.monitor@kanchiidly

Import Users

Copy Paste Upload

Name and Email

Enter one name and email address per line. To import more other fields, use the Upload tab.

e.g. John Doe, john.doe@your-server.com

Cancel Reset Import Users

There are two ways to import users:

1. Copy Paste - Import users with name and email address only.

- Enter the user's full name, followed by a comma, then their email address.
- Add more users in subsequent lines.
- Click 'Import Users' to add the users as guests.

2. Upload - Import users from a .csv file. More details can be added about a user with this method.

- Create a .csv file of users that you want to import. The file should have the following column headers:

Email,Name,Phone,Notes,Customer ID

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

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

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

Import Users
✕

Copy Paste

Upload

Import a CSV File

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

[📄 Example CSV File](#)

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

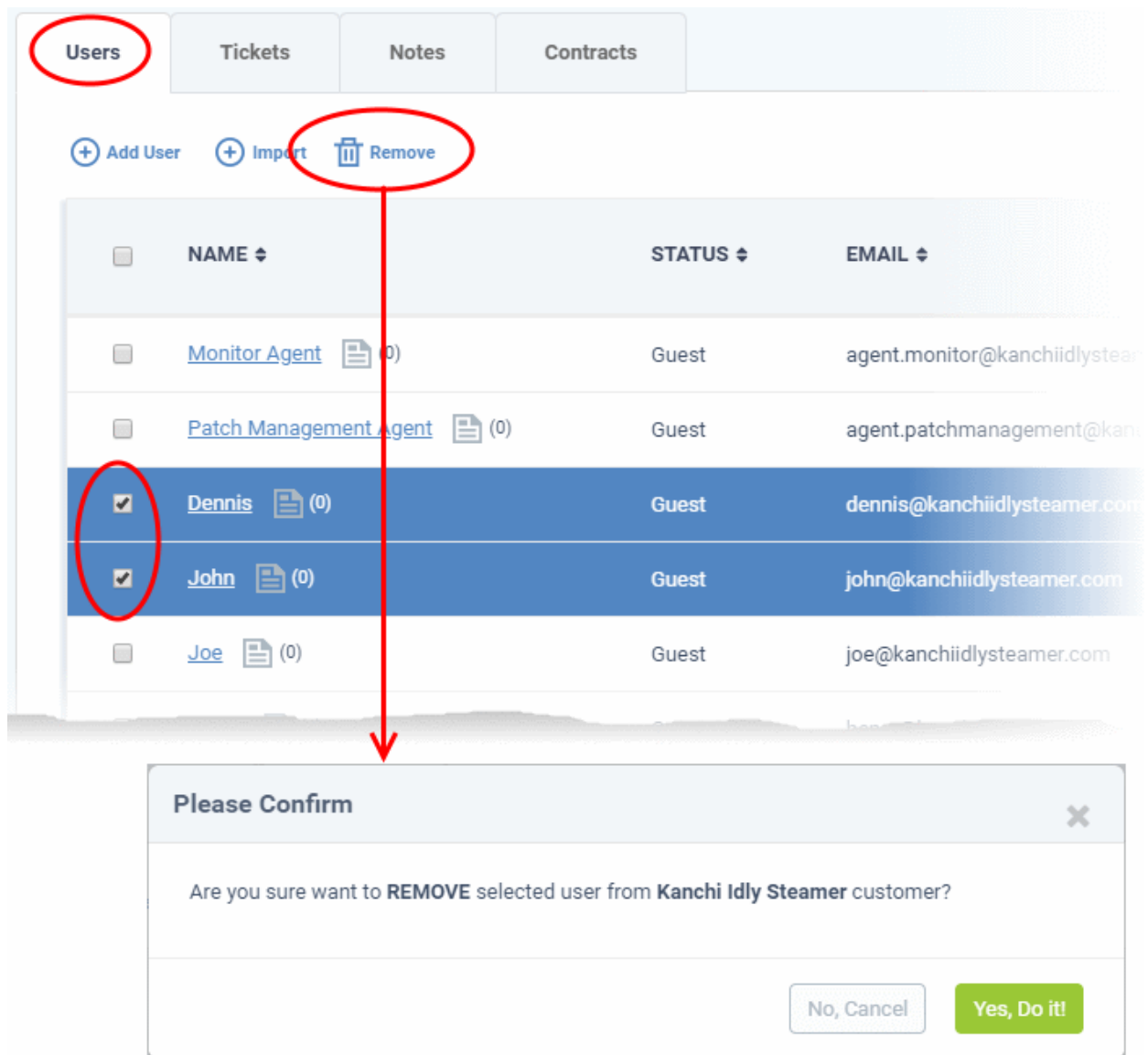
No file chosen

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






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

Remove users from a company

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



The screenshot shows the 'Users' tab in the ITarian Service Desk interface. The 'Remove' button is circled in red, and a red arrow points to a confirmation dialog box. The dialog box asks 'Are you sure want to REMOVE selected user from Kanchi Idly Steamer customer?' and has 'No, Cancel' and 'Yes, Do it!' buttons. The 'Users' table shows several users, with 'Dennis' and 'John' selected.

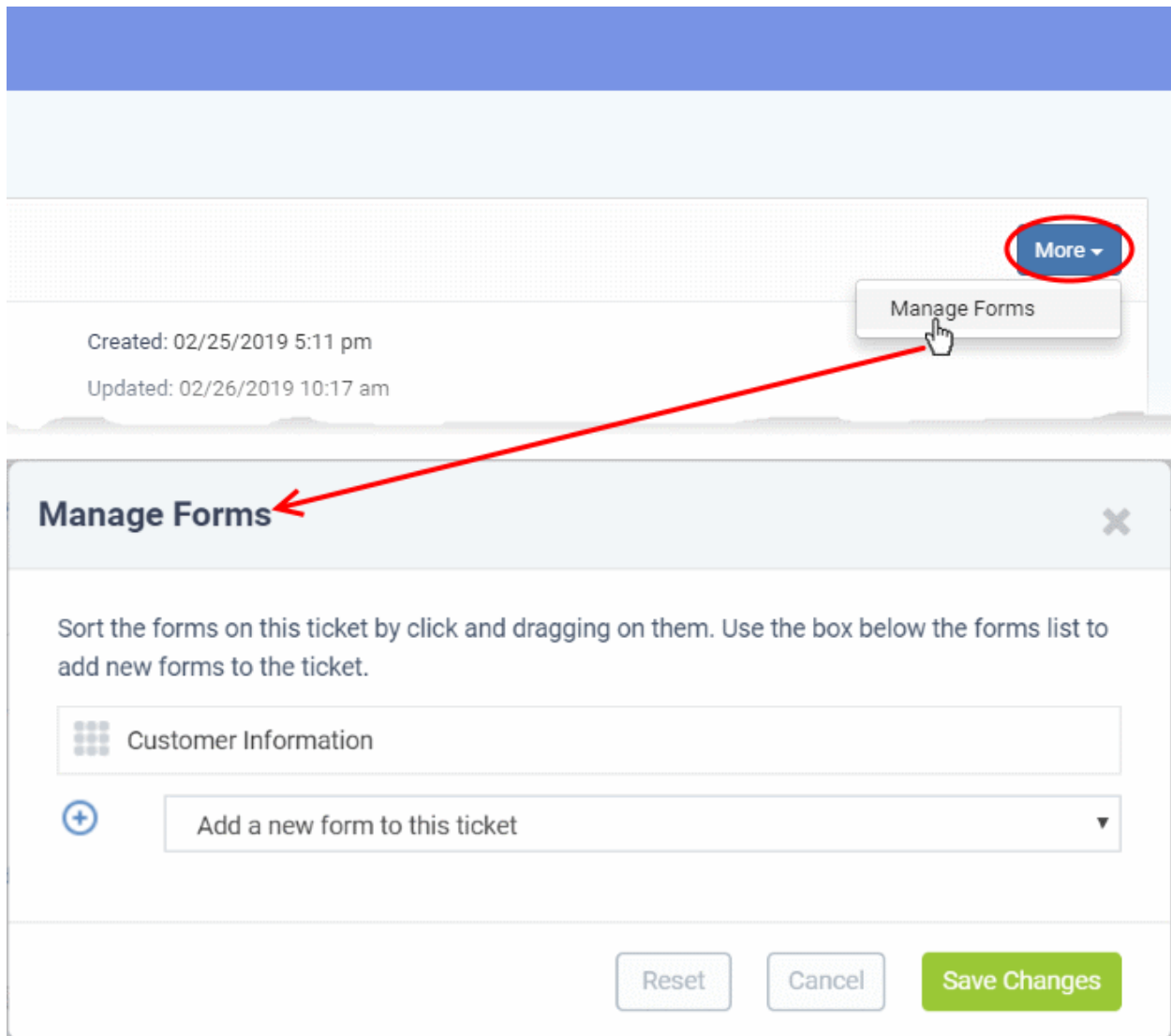
	NAME ↕	STATUS ↕	EMAIL ↕
<input type="checkbox"/>	Monitor Agent  (0)	Guest	agent.monitor@kanchiidlysteamer.com
<input type="checkbox"/>	Patch Management Agent  (0)	Guest	agent.patchmanagement@kan
<input checked="" type="checkbox"/>	Dennis  (0)	Guest	dennis@kanchiidlysteamer.com
<input checked="" type="checkbox"/>	John  (0)	Guest	john@kanchiidlysteamer.com
<input type="checkbox"/>	Joe  (0)	Guest	joe@kanchiidlysteamer.com

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

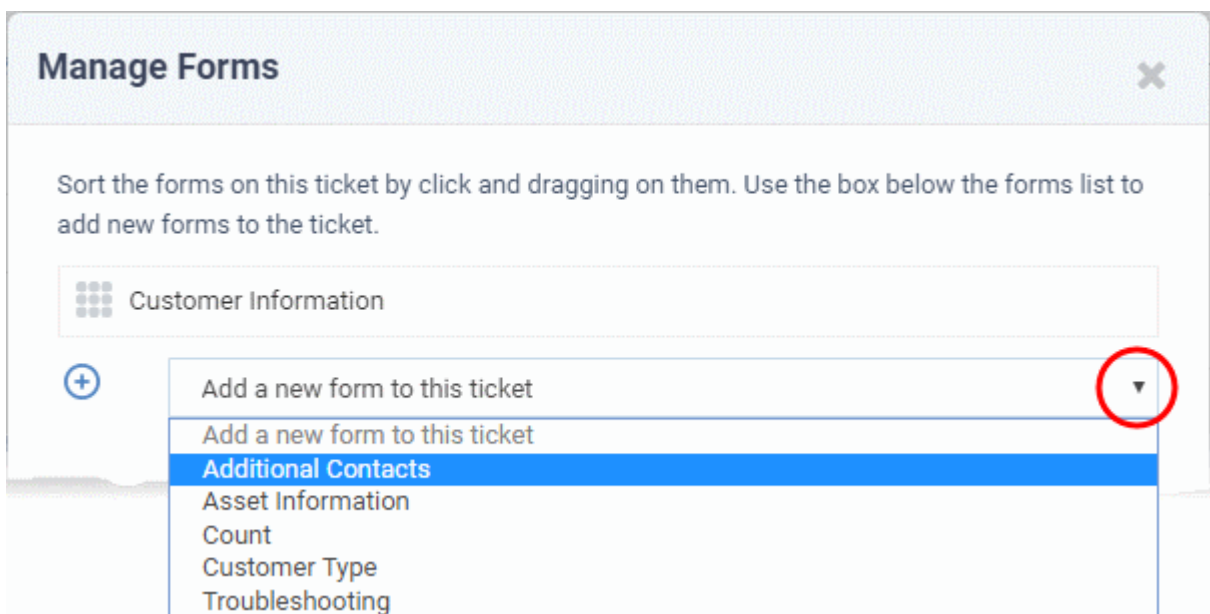
The user will not be able to login to the web portal and generate tickets.

Add additional details about a customer

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



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



- Repeat the process to add more forms

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

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

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

Kanchi Idly Steamer

Fields Settings

Customer Information: Details on customer.

Name: * Kanchi Idly Steamer

Web Domain: *

Address:

Phone: Ext:

Website:

Internal Notes:

Additional Contacts :

Overseas contact number:

Man power Agent Contact:

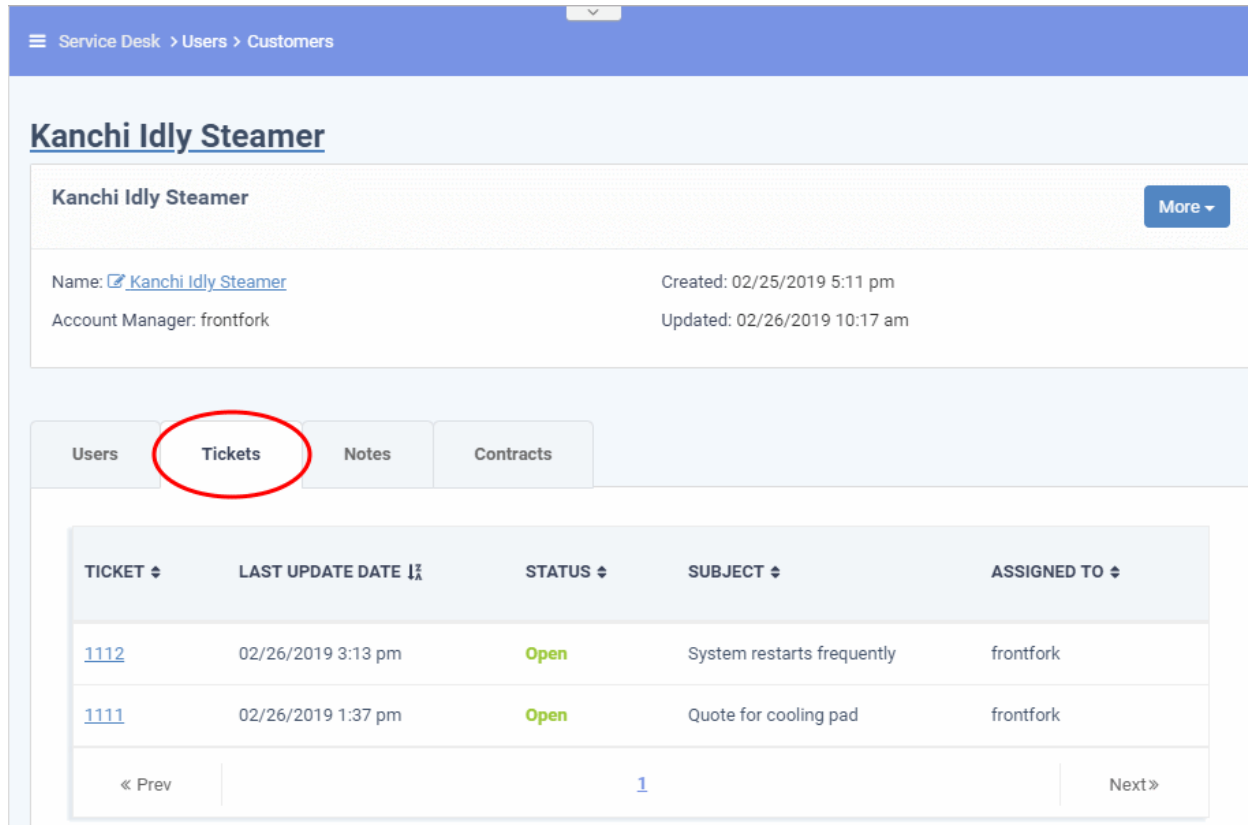
Type: Non-managed

Cancel Reset Update Customer

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

Manage tickets raised by users of a customer company

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



Service Desk > Users > Customers

Kanchi Idly Steamer

Kanchi Idly Steamer More ▾

Name: [Kanchi Idly Steamer](#) Created: 02/25/2019 5:11 pm
Account Manager: frontfork Updated: 02/26/2019 10:17 am

Users **Tickets** Notes Contracts

TICKET ↕	LAST UPDATE DATE ↕	STATUS ↕	SUBJECT ↕	ASSIGNED TO ↕
1112	02/26/2019 3:13 pm	Open	System restarts frequently	frontfork
1111	02/26/2019 1:37 pm	Open	Quote for cooling pad	frontfork

« Prev 1 Next »

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

Manage notes for a customer

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

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

Service Desk > Users > Customers

Kanchi Idly Steamer

Kanchi Idly Steamer More ▾

Name: [Kanchi Idly Steamer](#) Created: 02/25/2019 5:11 pm
 Account Manager: frontfork Updated: 02/26/2019 10:17 am

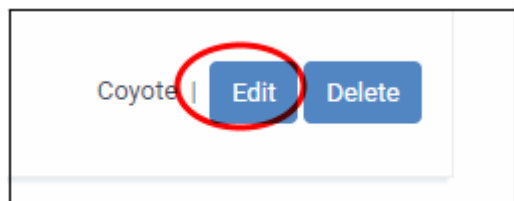
Users Tickets **Notes** Contracts

02/26/2019 3:24 pm
 The customer has many users to be enrolled frontfork | Edit Delete

02/26/2019 3:25 pm
 The customer expanded their network frontfork | Edit Delete

[+ Click to create a new note](#)

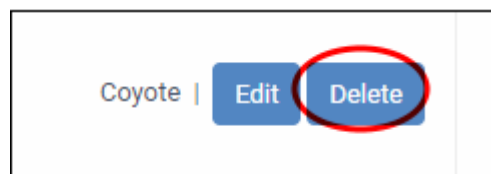
- Click the 'Click to create a new note' link, enter the required content and then click the 'Create' button at the bottom to add a new note.
- To view / edit a note, click the 'Edit' button at the far end of the note.



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



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



View service contracts associated with a customer

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

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

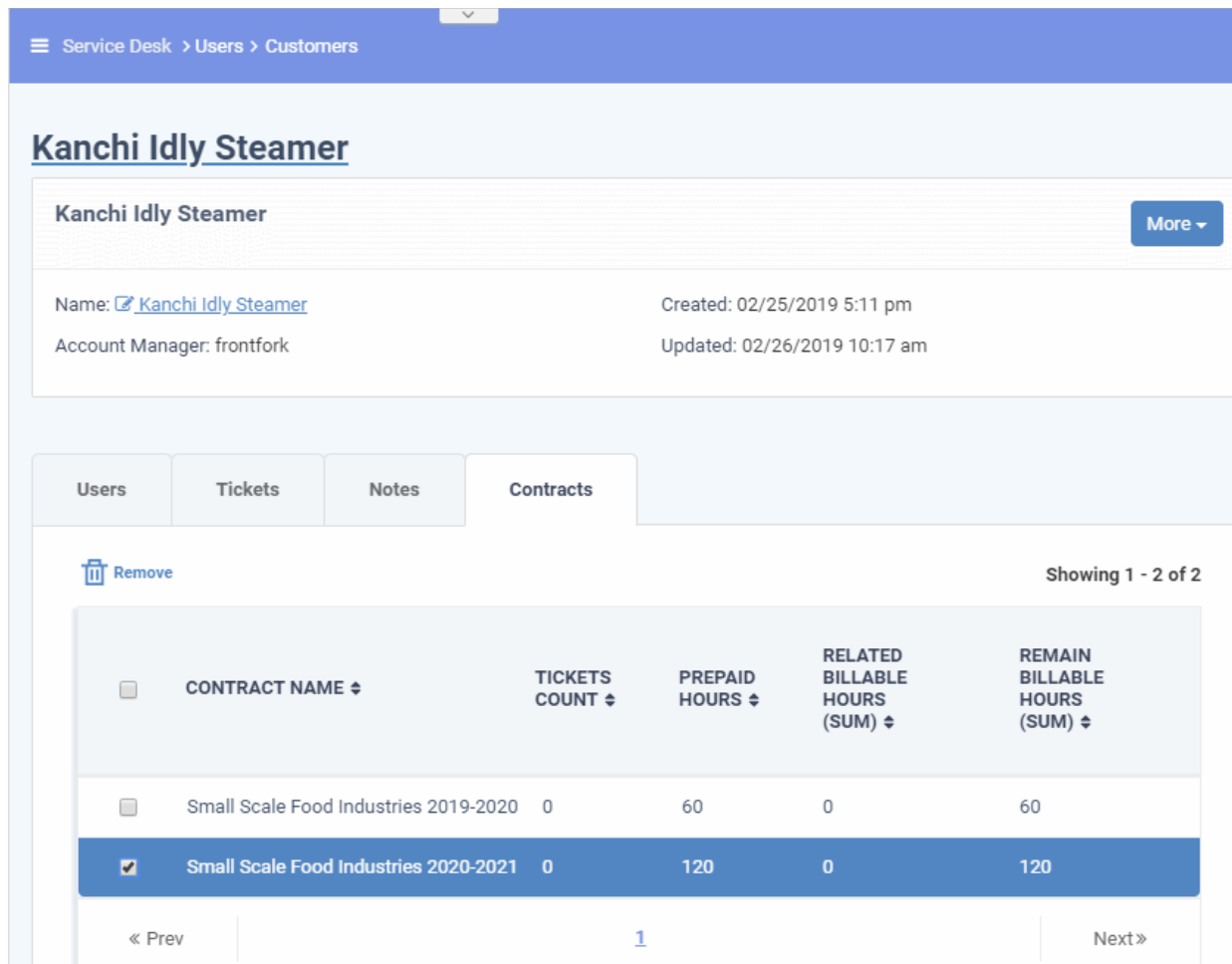
Service Contract

A service contract between you and a customer can include:

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

View a customer's contracts

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



Service Desk > Users > Customers

Kanchi Idly Steamer

Kanchi Idly Steamer More ▾

Name: [Kanchi Idly Steamer](#) Created: 02/25/2019 5:11 pm
 Account Manager: frontfork Updated: 02/26/2019 10:17 am

Users Tickets Notes **Contracts**

Remove Showing 1 - 2 of 2

<input type="checkbox"/>	CONTRACT NAME ↕	TICKETS COUNT ↕	PREPAID HOURS ↕	RELATED BILLABLE HOURS (SUM) ↕	REMAIN BILLABLE HOURS (SUM) ↕
<input type="checkbox"/>	Small Scale Food Industries 2019-2020	0	60	0	60
<input checked="" type="checkbox"/>	Small Scale Food Industries 2020-2021	0	120	0	120

« Prev 1 Next »

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

Remove Unmanaged Customers

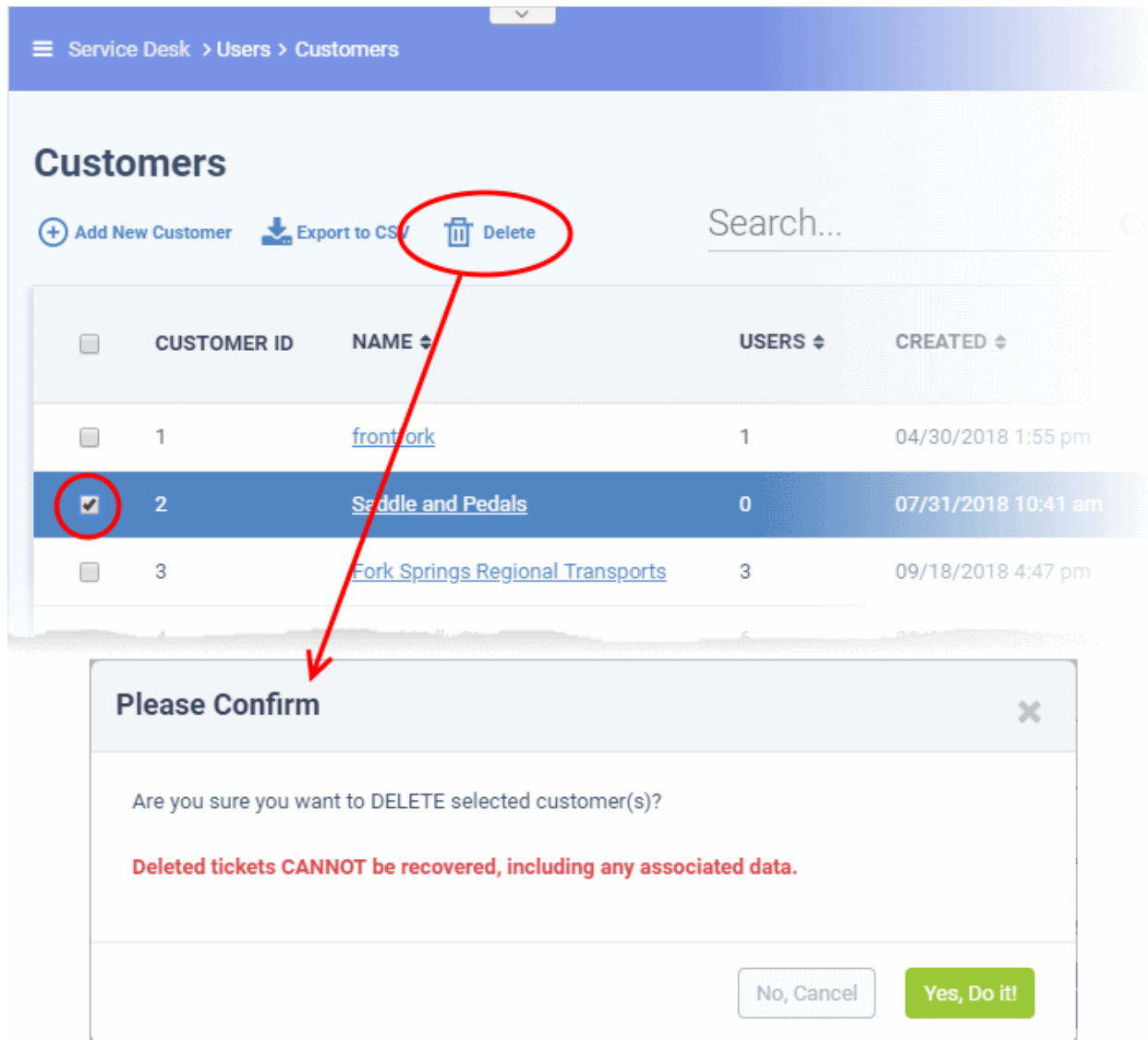
- Customers added via ITarian are known as 'Managed' customers. They are automatically imported into Service Desk and cannot be removed. This is because they also appear in other products like Endpoint Manager.
- Customers added via the Service Desk interface are known as 'Unmanaged' customers. You can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

Remove customers

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

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

- Click 'Delete' at the top.



Service Desk > Users > Customers

Customers

[+ Add New Customer](#) [Export to CSV](#) [Delete](#) Search...

<input type="checkbox"/>	CUSTOMER ID	NAME	USERS	CREATED
<input type="checkbox"/>	1	front fork	1	04/30/2018 1:55 pm
<input checked="" type="checkbox"/>	2	Saddle and Pedals	0	07/31/2018 10:41 am
<input type="checkbox"/>	3	Fork Springs Regional Transports	3	09/18/2018 4:47 pm

Please Confirm

Are you sure you want to DELETE selected customer(s)?

Deleted tickets CANNOT be recovered, including any associated data.

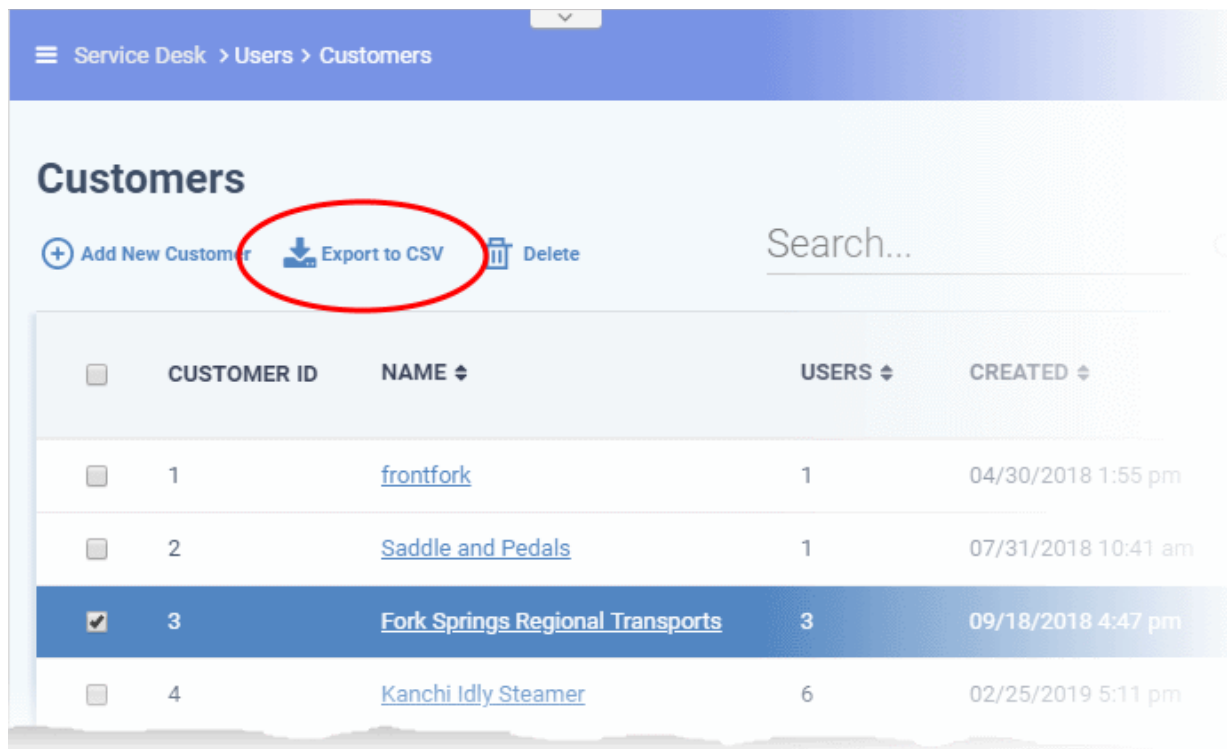
[No, Cancel](#) [Yes, Do it!](#)

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

Export a customer list to CSV

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

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



Service Desk > Users > Customers

Customers

[+ Add New Customer](#)
[Export to CSV](#)
[Delete](#)

Search...

<input type="checkbox"/>	CUSTOMER ID	NAME ↕	USERS ↕	CREATED ↕
<input type="checkbox"/>	1	frontfork	1	04/30/2018 1:55 pm
<input type="checkbox"/>	2	Saddle and Pedals	1	07/31/2018 10:41 am
<input checked="" type="checkbox"/>	3	Fork Springs Regional Transports	3	09/18/2018 4:47 pm
<input type="checkbox"/>	4	Kanchi Idly Steamer	6	02/25/2019 5:11 pm

2.3 Manage Tickets

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

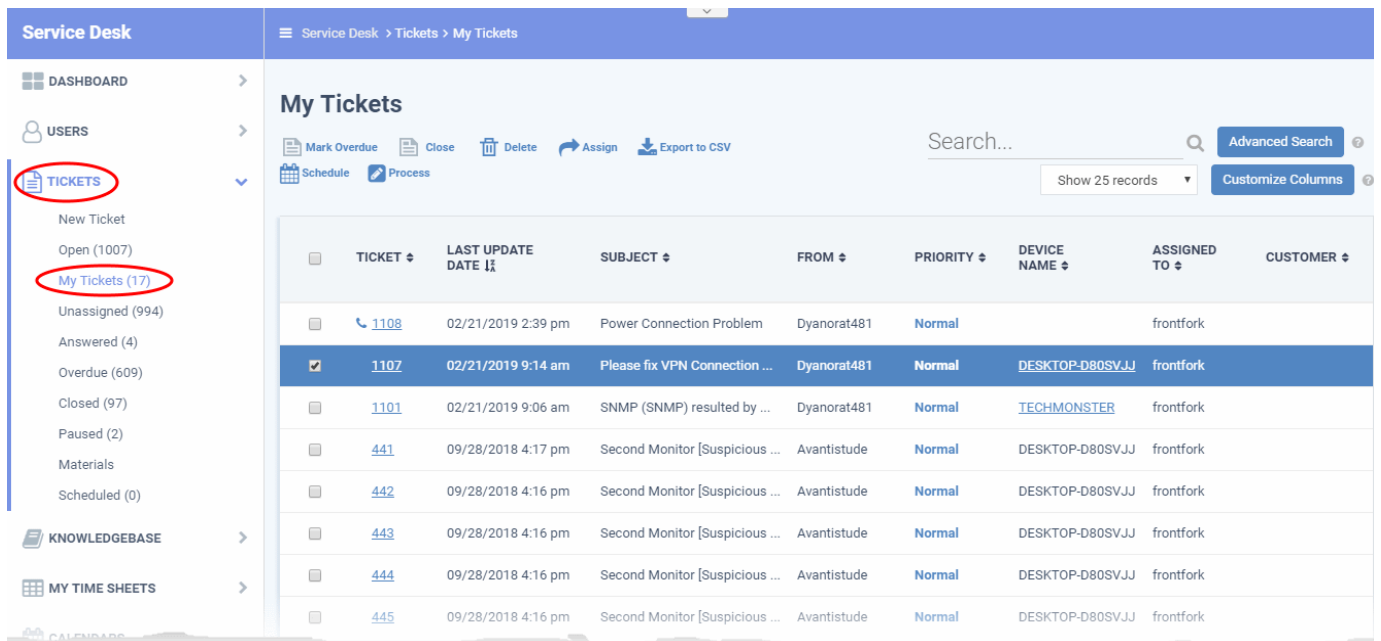
Tickets can be submitted to Service Desk using the following interfaces:

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

To open the 'Tickets' interface:

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

- Scheduled
- Paused







The screenshot shows the Service Desk interface. On the left sidebar, the 'TICKETS' menu item is circled in red. Below it, a list of ticket filters is visible, with 'My Tickets (17)' also circled in red. The main content area displays a table of tickets under the heading 'My Tickets'. The table has columns for Ticket ID, Last Update Date, Subject, From, Priority, Device Name, Assigned To, and Customer. The ticket with ID 1107 is highlighted in blue.

TICKET	LAST UPDATE DATE	SUBJECT	FROM	PRIORITY	DEVICE NAME	ASSIGNED TO	CUSTOMER
1108	02/21/2019 2:39 pm	Power Connection Problem	Dyanorat481	Normal		frontfork	
1107	02/21/2019 9:14 am	Please fix VPN Connection ...	Dyanorat481	Normal	DESKTOP-D80SVJJ	frontfork	
1101	02/21/2019 9:06 am	SNMP (SNMP) resulted by ...	Dyanorat481	Normal	TECHMONSTER	frontfork	
441	09/28/2018 4:17 pm	Second Monitor [Suspicious ...	Avantistude	Normal	DESKTOP-D80SVJJ	frontfork	
442	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantistude	Normal	DESKTOP-D80SVJJ	frontfork	
443	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantistude	Normal	DESKTOP-D80SVJJ	frontfork	
444	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantistude	Normal	DESKTOP-D80SVJJ	frontfork	
445	09/28/2018 4:16 pm	Second Monitor [Suspicious ...	Avantistude	Normal	DESKTOP-D80SVJJ	frontfork	

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

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

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

Tickets - Table of Column Descriptions	
Column Header	Description
Ticket	<p>The number assigned to the ticket. Clicking the ticket number will open the 'Ticket Details' screen.</p> <ul style="list-style-type: none">  - Tickets that were raised via the web portal.  - Tickets that were raised via email.  - Tickets that were raised by staff members on behalf of users.
Last Update Date	The date and time at which ticket was created, reopened, last updated or closed.
Subject	<p>A brief description of the issue.</p> <ul style="list-style-type: none"> In many cases, the subject will have been specified by the user or staff member who created the ticket. This is done in the 'Issue Summary' field of the 'New Ticket' interface. The subject of tickets that were created by another ITarian module will simply say which module spawned the ticket. For example, 'RMM Generated Ticket'. The  icon in the subject column indicates that one or more collaborators have been added to the ticket CC list
From	The name of the user that raised the ticket.
Priority	<p>The criticality of the ticket.</p> <ul style="list-style-type: none"> Ticket priority depends on the settings in 'Ticket Category', 'Department' and 'Ticket Filters'. Tickets raised via email can have their priority set by the sender's mail client if enabled in 'Admin Panel' > 'Settings' > Emails (see the 'Incoming Emails' section). If no custom settings apply, then tickets are given the default priority of 'Normal'.
Device Name	<p>The label of the endpoint for which the ticket was generated.</p> <ul style="list-style-type: none"> The device name is shown only for tickets created by Endpoint Manager. Click the device name to view the Device Summary interface for the device in Endpoint Manager. The 'Device Summary' interface contains general device information, including operating system details, hardware details, last activity, Comodo Client - Security (CCS) configuration, resource usage and more. See http://help.comodo.com/topic-399-1-786-10175-View-Summary-Information.html for more details of the information contained in this interface.
Assigned To	<p>The name of the column header depends on the ticket status that you have selected. For example, for 'Unassigned' tickets the column header will be 'Department'.</p> <ul style="list-style-type: none"> 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
Customer	The company of the user who raised the ticket

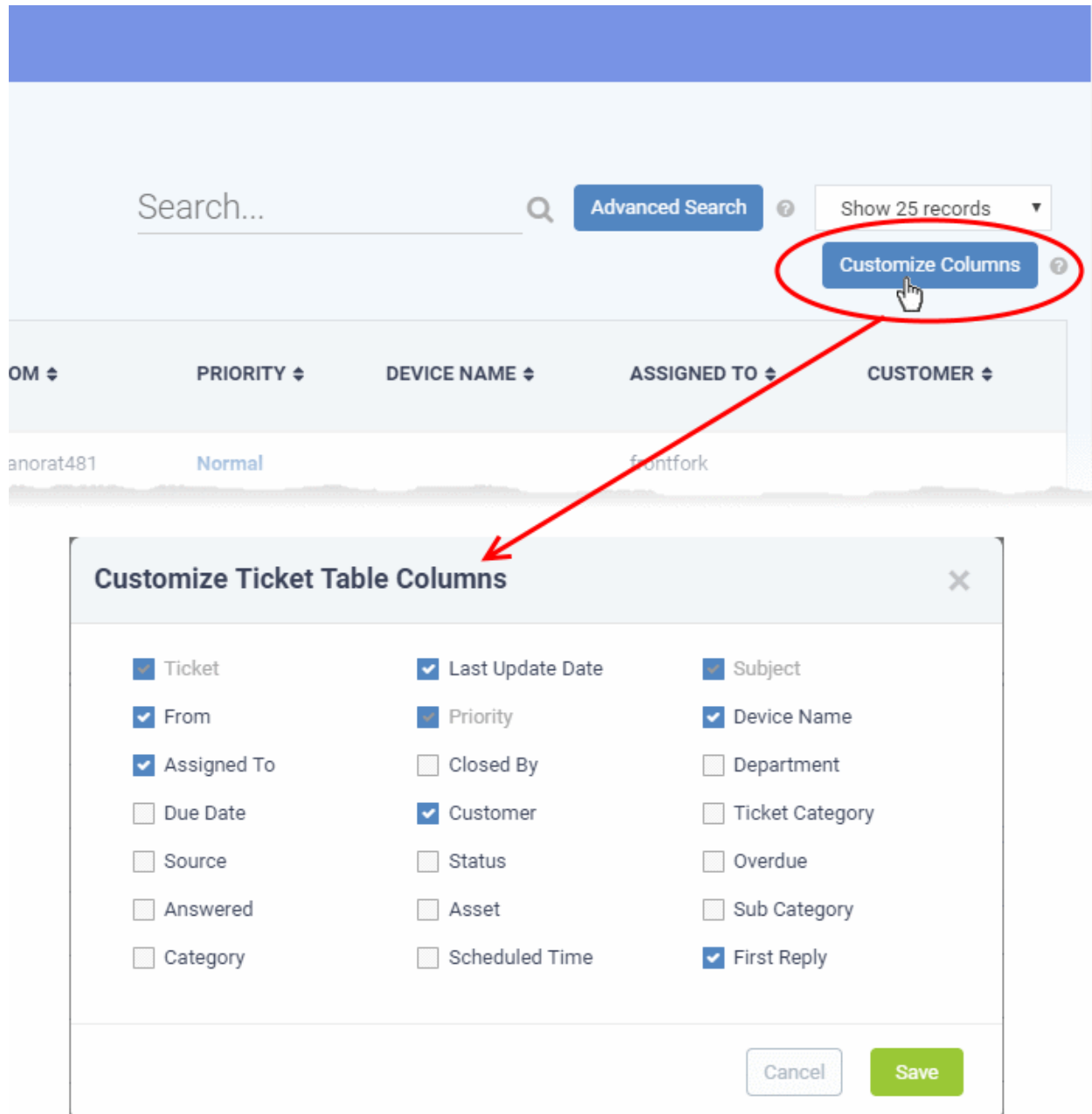
Tickets - Table of Column Descriptions	
Column Header	Description
Source	The channel through which the ticket was created. Possible channels are: <ul style="list-style-type: none"> • Phone • Email • Other • Web • API
Sub Category	Sub-categories are specific topics grouped under a main support topic. For example, 'My toaster keeps burning the toast' might be a sub-category of 'Toaster Help'. It is optional for you to create sub-categories of a support category. Sub-categories are selected by users when they submit their ticket.
Department	The department of your company to which the ticket is assigned
Due Date	The date and time by which the ticket should be closed.
Closed By	Staff member who closed the ticket.
Status	Ticket progress. Possible values are: <ul style="list-style-type: none"> • Open • Answered • Overdue • Closed • Paused
Ticket Category	Displays the help topic on which the user requested support. See ticket categories in the admin guide for more details.
Overdue	Indicates whether the ticket was not closed on or before the due date.
Answered	Indicates whether a response has been given to the user for the reported issue.
Asset	The product, service, or item that the ticket concerns.
Category (Ticket Type)	The support category of the ticket. The possible values are: <ul style="list-style-type: none"> • Alert • Order • Problem
Sub-Category	Specific issue type as chosen by the person who created the ticket. For example, 'Overheating' may be a sub-category of 'Problem'.
Scheduled Time	Date and time at which the ticket will be attended to.
First Reply	Date and time of the first response to the user.

Add or Remove Columns

The columns displayed by default depend on the ticket filter chosen on the left. You can add more columns if you

want to view additional details and hide columns that you do not want to be displayed.

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



The screenshot shows the Service Desk interface with a search bar and a 'Customize Columns' button circled in red. A red arrow points from the button to a 'Customize Ticket Table Columns' dialog box. The dialog box contains a list of columns with checkboxes to enable or disable them. The 'Save' button is highlighted in green.

Column Name	Checked
Ticket	Yes
From	Yes
Assigned To	Yes
Due Date	No
Source	No
Answered	No
Category	No
Last Update Date	Yes
Priority	Yes
Closed By	No
Customer	Yes
Status	No
Asset	No
Scheduled Time	No
Subject	Yes
Device Name	Yes
Department	No
Ticket Category	No
Overdue	No
Sub Category	No
First Reply	Yes

- 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

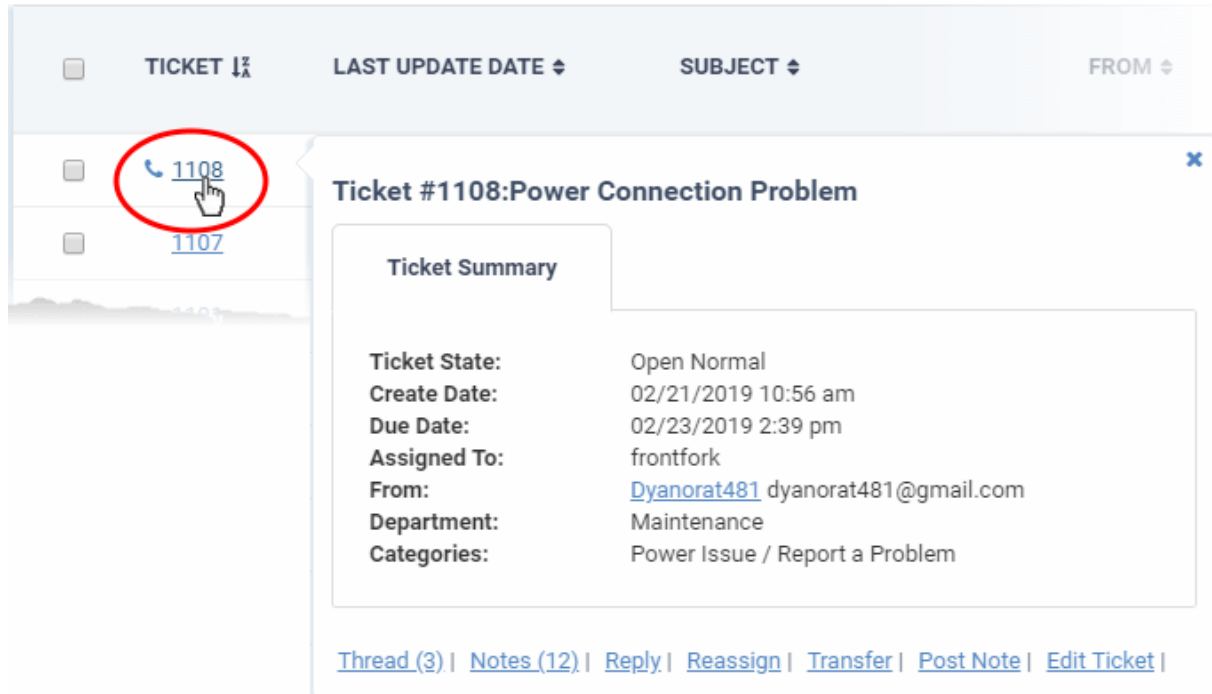
The following sections explain more about managing tickets and creating a new ticket:

- 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 screenshot shows a list of tickets with columns for 'TICKET', 'LAST UPDATE DATE', 'SUBJECT', and 'FROM'. A mouse cursor is hovering over the ticket number '1108', which is circled in red. A tooltip window titled 'Ticket #1108: Power Connection Problem' is displayed, showing the following details:

Ticket Summary	
Ticket State:	Open Normal
Create Date:	02/21/2019 10:56 am
Due Date:	02/23/2019 2:39 pm
Assigned To:	frontfork
From:	Dyanorat481 dyanorat481@gmail.com
Department:	Maintenance
Categories:	Power Issue / Report a Problem

At the bottom of the tooltip, there are links for: [Thread \(3\)](#) | [Notes \(12\)](#) | [Reply](#) | [Reassign](#) | [Transfer](#) | [Post Note](#) | [Edit Ticket](#)

The links at the bottom allow staff members to manage the ticket. See '[Ticket Details](#)' for more details.

Process a Ticket








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

Use the process option

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

Service Desk > Tickets > My Tickets

My Tickets

 Mark Overdue  Close  Delete  Assign  Export to CSV  Schedule  Process

<input type="checkbox"/>	TICKET ↓	LAST UPDATE DATE ↓	SUBJECT ↓	FROM ↓
<input checked="" type="checkbox"/>	1108	02/21/2019 2:39 pm	Power Connection Problem	Dyanorat481
<input type="checkbox"/>	1107	02/21/2019 9:14 am	Please fix VPN Connection ...	Dyanorat481
<input type="checkbox"/>	1101	02/21/2019 9:06 am	SNMP (SNMP) resulted by ...	Dyanorat481

The 'Process Ticket' screen opens:

Tickets

Process Ticket #1108

User Information: Currently selected user
 Dyanorat481 <dyanorat481@gmail.com> [Change](#)

Issue Summary:*

Issue Description: Device does not power on

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

Ticket Source:

Category:

Sub Category Level 1:

Department:

SLA Plan:

Time Spent: 0 hrs 32 min

Due Date:

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

Resolution:

Assign The Ticket

Assignee:

Ticket is currently assigned to **frontfork**

Comments:

Collaborators

[Add New Collaborator](#)

User Information

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

Ticket Information

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

Assign the Ticket

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

Collaborators

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

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

Ticket #1108: Add a collaborator ✕

🔍 Search existing users or add a new user.

Search by email, phone or name

Email Address: *

Full Name: *

Phone Number: Ext:

Internal Notes:

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

- 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 if it is currently assigned to someone else.
- The ticket can be rescheduled to a different time period from the 'Ticket Details' interface.

To create a schedule for a ticket

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

Open Tickets

Search...

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

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

Ticket #undefined: undefined

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

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

- 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.

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

- Click the tick mark to save the schedule

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

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

View Materials/Expense Items added to a Ticket

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

View ticket materials/expenses

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

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	22	34.99	04/25/2016 12:25 pm		Awaiting
Mileage	23	5.00	04/25/2016 12:25 pm		Awaiting
Toll	34	25.00	07/19/2016 4:33 pm		Awaiting
HP Ink Cartridge	448	100.00	12/02/2016 3:41 pm		Awaiting
4 GB RAM	448	2000.00	12/02/2016 3:41 pm		Awaiting
Ink Cartridge Holder	448	40.00	12/02/2016 3:42 pm		Awaiting
HP Ink Cartridge	448	50.00	12/02/2016 3:43 pm		Awaiting
4 GB RAM	448	1900.00	12/02/2016 3:43 pm		Awaiting

Column Headers

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

Sorting and Filtering Options

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

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

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

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

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

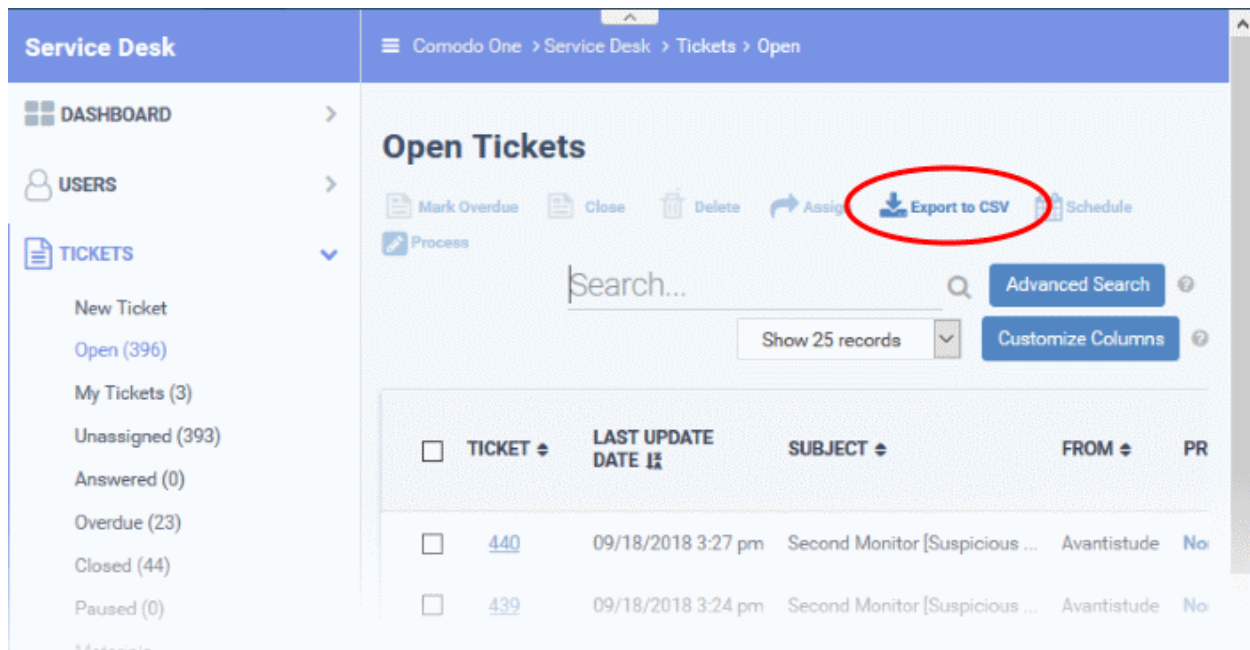
The 'Show records' drop-down on the right allows you to select the number of entries to be displayed per page. The options range from 10 records per page up to 100. The default value can be set in the **'My Profile'** interface. You can navigate to different pages by clicking 'Next' and 'Prev'.

Export tickets to a CSV file

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

To save the list of tickets

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



The screenshot shows the 'Open Tickets' page in the Service Desk. The left sidebar contains navigation options: DASHBOARD, USERS, and TICKETS. The main area displays a list of open tickets with columns for TICKET, LAST UPDATE DATE, SUBJECT, FROM, and PR. The 'Export to CSV' button is highlighted with a red circle.

TICKET	LAST UPDATE DATE	SUBJECT	FROM	PR
440	09/18/2018 3:27 pm	Second Monitor [Suspicious ...	Avantistude	No
439	09/18/2018 3:24 pm	Second Monitor [Suspicious ...	Avantistude	No

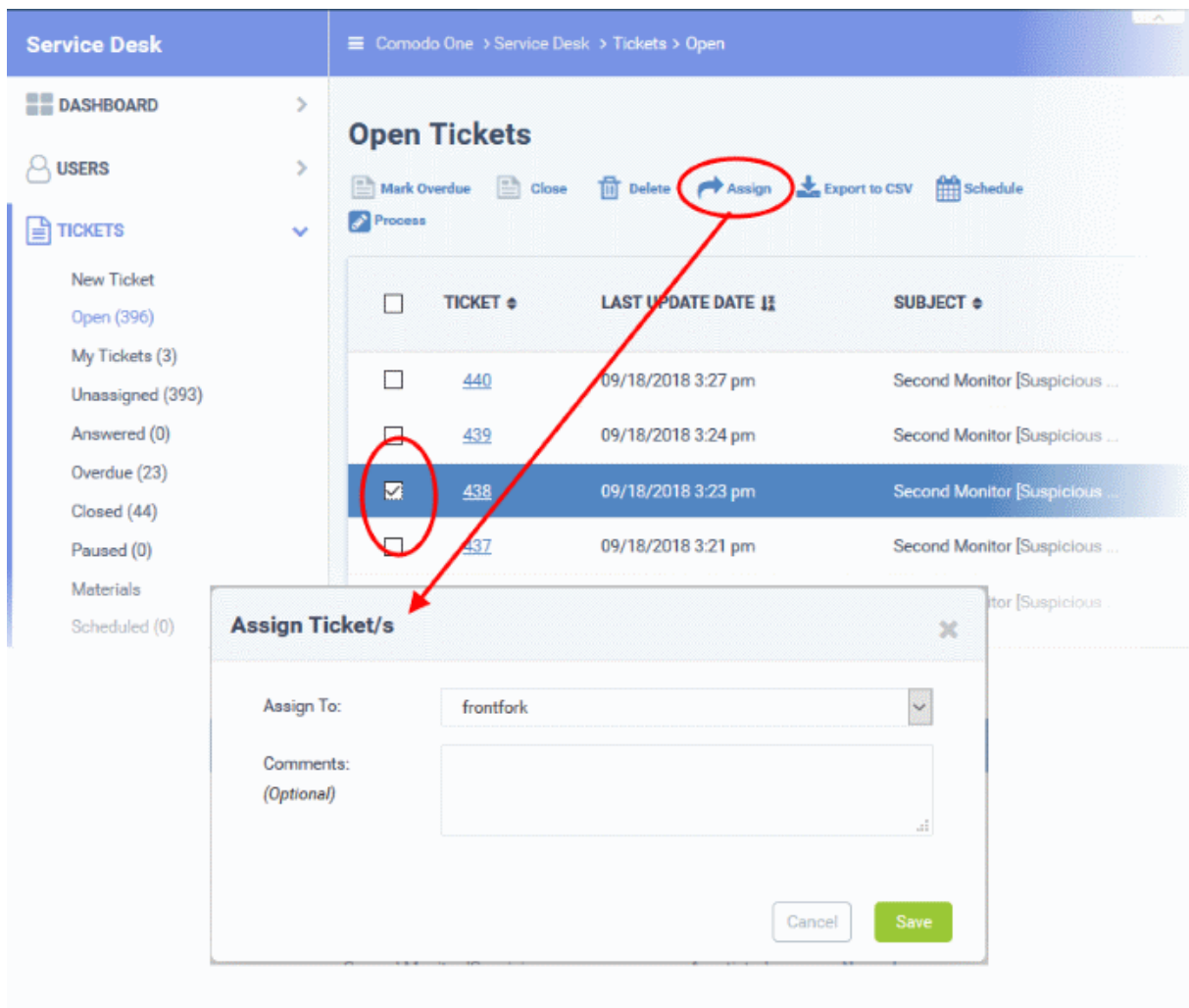
The list will be downloaded as a .csv file. The file can be opened with spreadsheet applications like Microsoft Excel and OpenOffice Calc.

Assign Tickets to a Staff Member

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

Assign a ticket

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



The screenshot shows the 'Service Desk' interface with the 'Open Tickets' list. The 'Assign' button in the toolbar is circled in red. A red arrow points from the 'Assign' button to the 'Assign Ticket/s' modal dialog. The modal dialog has a dropdown menu for 'Assign To' set to 'frontfork' and a text area for 'Comments (Optional)'. The 'Save' button is highlighted in green.

TICKET #	LAST UPDATE DATE	SUBJECT
440	09/18/2018 3:27 pm	Second Monitor [Suspicious ...
439	09/18/2018 3:24 pm	Second Monitor [Suspicious ...
438	09/18/2018 3:23 pm	Second Monitor [Suspicious ...
437	09/18/2018 3:21 pm	Second Monitor [Suspicious ...

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

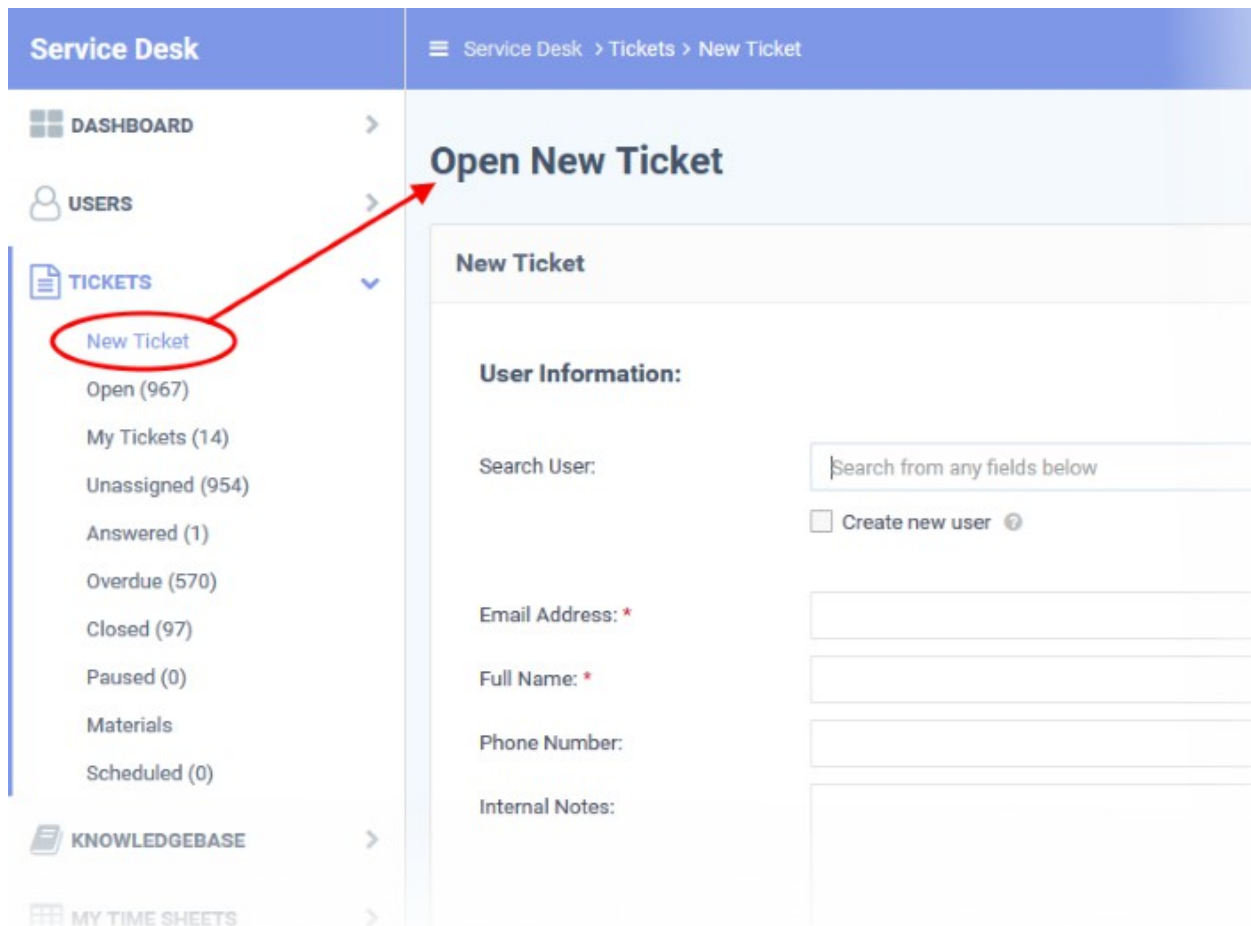
Create a new ticket on behalf of a user

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

To create a new ticket

- Click 'Tickets' then select 'New Ticket'

The 'Open New Ticket' page will open:



The screenshot shows the 'Service Desk' interface. The left sidebar contains a navigation menu with categories: DASHBOARD, USERS, TICKETS, KNOWLEDGEBASE, and MY TIME SHEETS. Under the 'TICKETS' category, 'New Ticket' is highlighted with a red circle. A red arrow points from this circle to the 'Open New Ticket' header in the main content area. The main content area displays the 'New Ticket' form, which includes a 'User Information' section with the following fields: 'Search User' (with a search box), 'Create new user' (checkbox), 'Email Address: *', 'Full Name: *', 'Phone Number:', and 'Internal Notes:'.

It contains the following sections:


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

The following sections describe each ticket section in detail:

User Information

User Information:

Search User:

Create new user 

Email Address: *

Full Name: *

Phone Number: Ext:

Internal Notes:

Ticket Notice: Send alert to user.

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

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

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

Ticket Information & Options

Ticket Information & Options:

Ticket Source: * ▼

Category: * ▼

Schedule Time:

Department: ▼

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

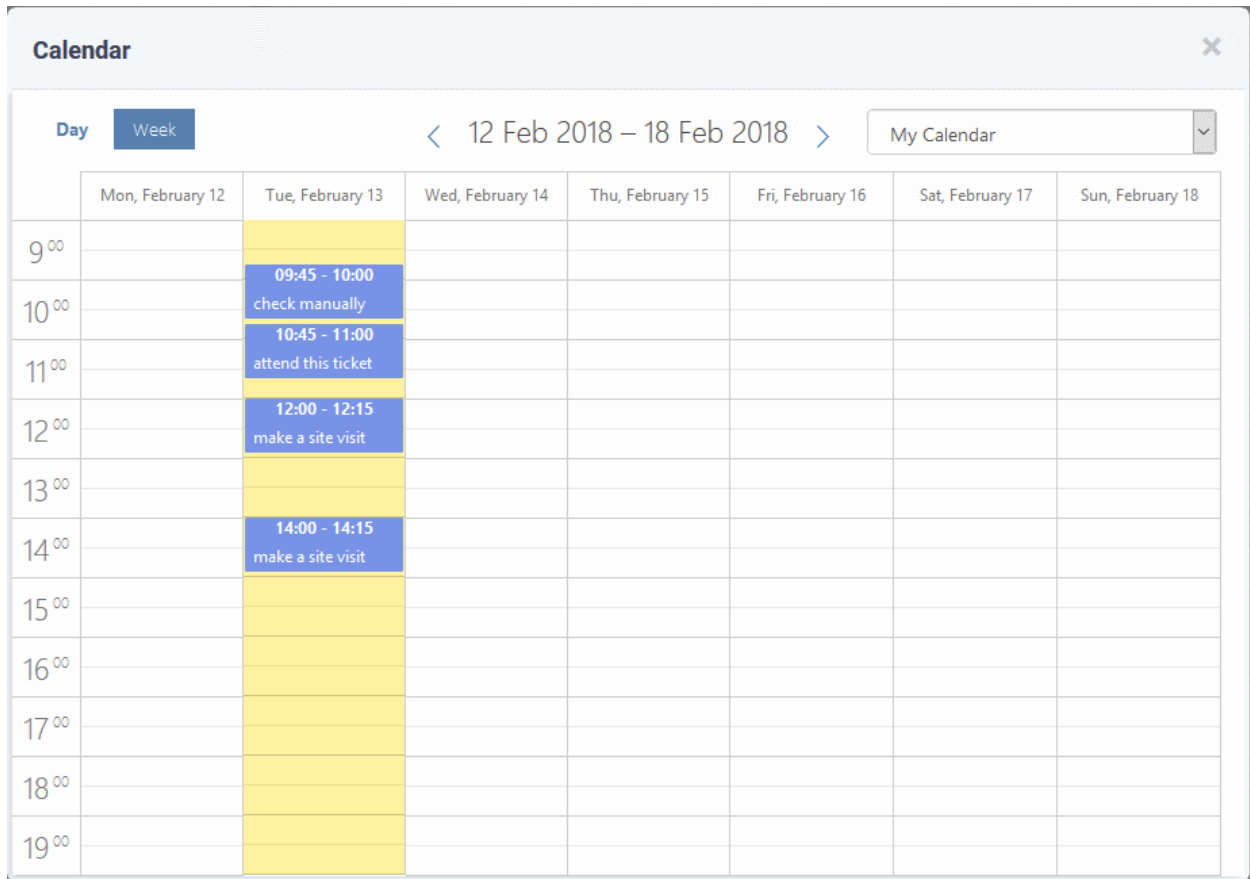
Due Date: * ▼ ▼ *Time is based on your time zone (GMT+5.30)*

Assign To: ▼

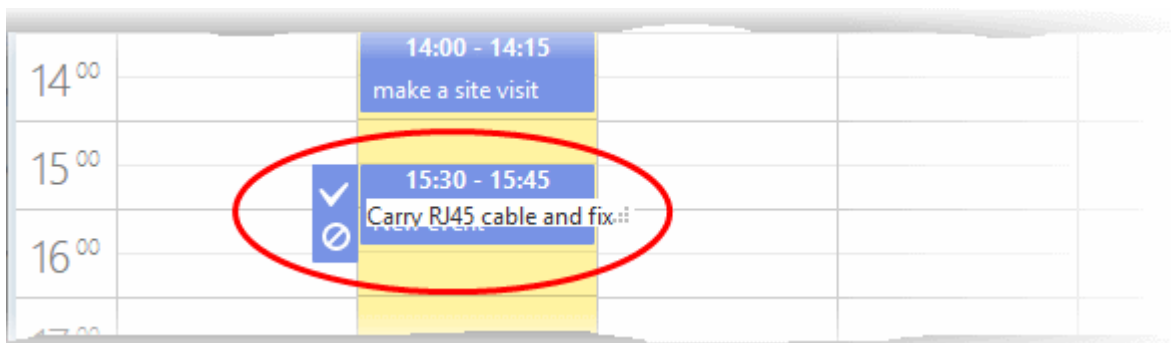
- **Ticket Source:** Select the source through which you received the request for the ticket. The options are 'Phone', 'Email' and 'Other'.
- **Category:** Select the help topic under which the ticket falls. Depending on the ticket category selected, more forms may be included in the ticket.
- **Schedule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

To set a schedule

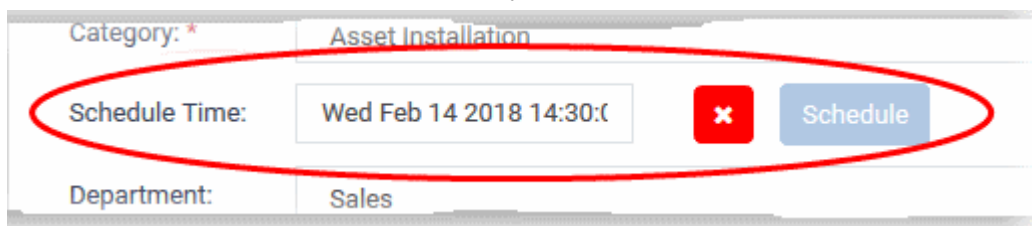
- Click the 'Schedule' button to open the calendar:



- The current week is shown by default. You can view the current week or day by clicking the respective button above the calendar.
- 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

Backdated Ticket: Work done in the past

Start Date: 

End Date: 


- **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


Ticket Details: Please Describe Your Issue

Issue Summary: *

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

Priority Level: * High 

Asset Type: Other 

Ticket Type: – Select – 

Ticket Type Sub Category:

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

Response

Response: Optional response to the above issue.

Canned Response:

Attachments: *Response required for file upload*

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

Resolution: **Set Response as Resolution or [Add Resolution](#)**

Signature: None Dept. Signature (if set)

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

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

Internal Note

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

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

Sorting and Filtering Options in the 'Tickets' Interface

Sorting items

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

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

Search Options

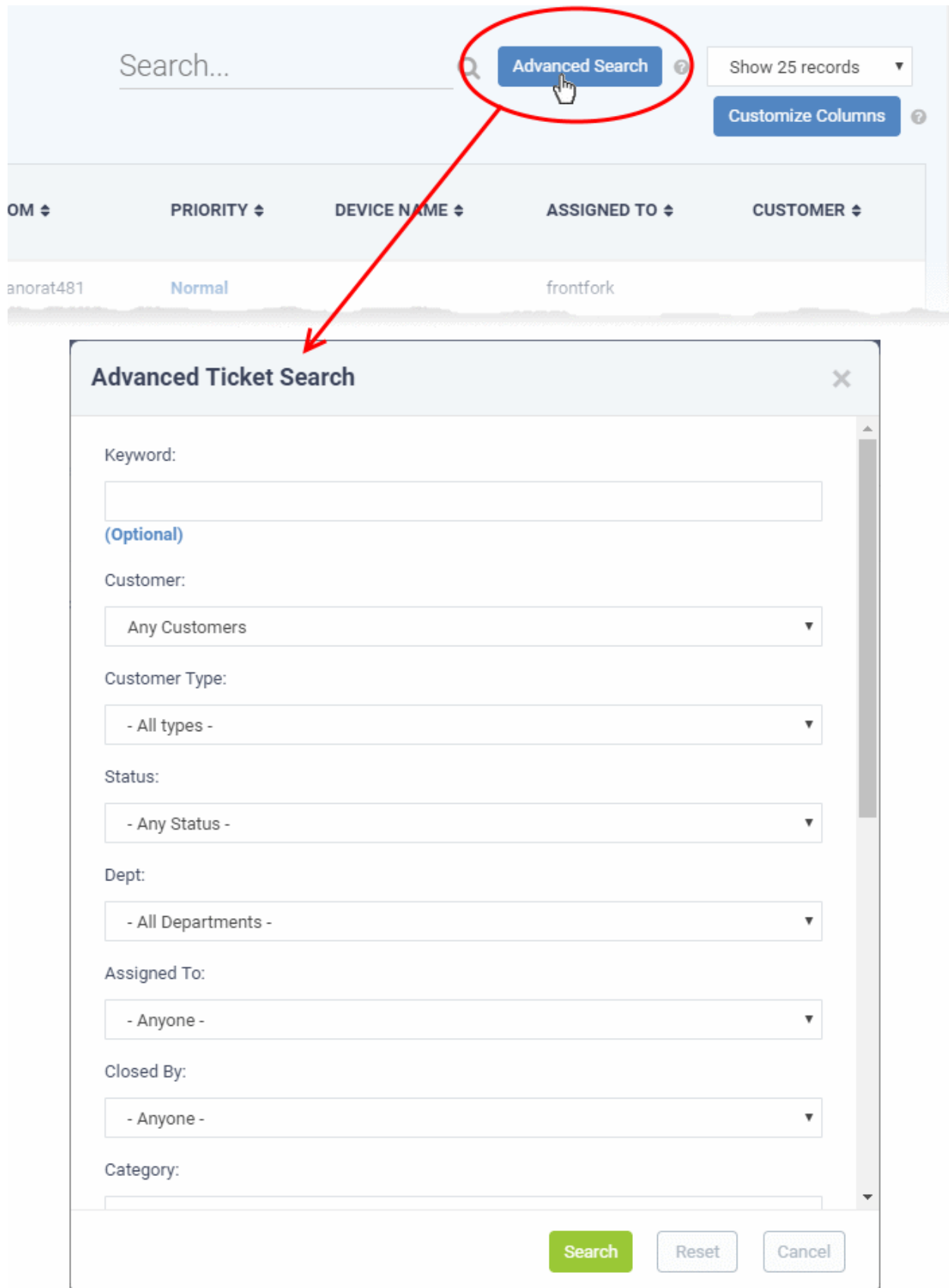
You can run a simple search or an advanced search on tickets.

Simple Search

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

Advanced Search

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



Search... **Advanced Search** Show 25 records Customize Columns

OM **PRIORITY** **DEVICE NAME** **ASSIGNED TO** **CUSTOMER**

anorat481 Normal frontfork

Advanced Ticket Search

Keyword:

(Optional)

Customer:

Customer Type:

Status:

Dept:

Assigned To:

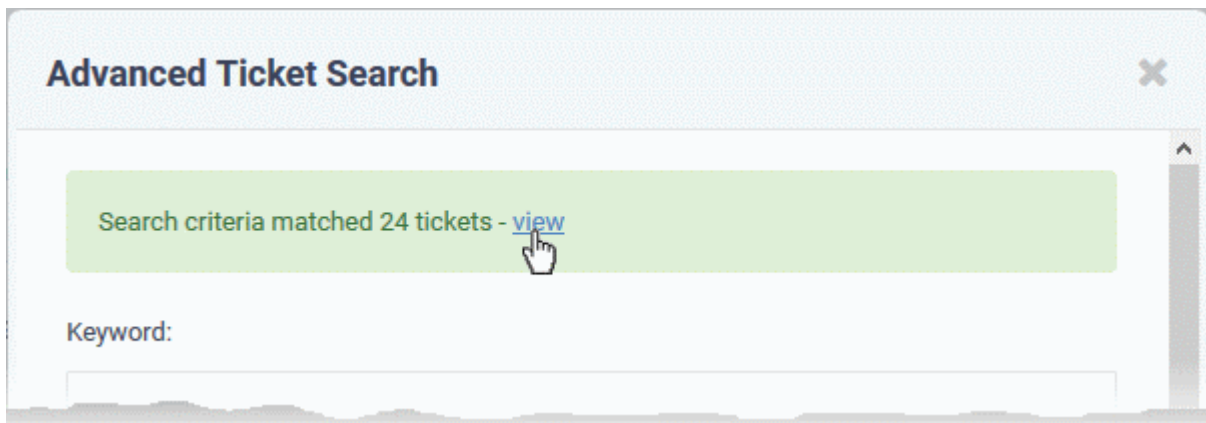
Closed By:

Category:

Search Reset Cancel

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

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



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

2.3.1 Ticket Details

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

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

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

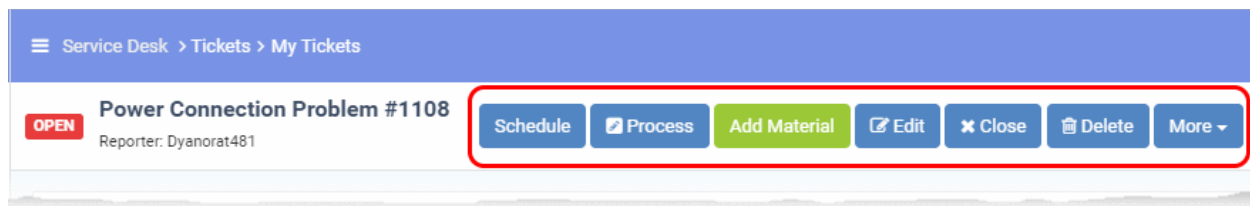
- **Title bar** - Shows basic ticket details and contains controls to manage the ticket. See '**Manage the Ticket**' for more details.
- **Ticket Information** - General details about the ticket.
- **Ticket Workflow** - Appears only for multi-stage tickets. Displays the status of successive stages of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

Manage the Ticket

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



Click the following links to find out more:

- **Process** - Quick edit feature. Reassign the ticket, update ticket details, change due-date, add collaborators.
- **Remote Control** - Make a remote desktop connection to the device that generated the ticket. Only available for tickets auto-generated by the Endpoint Manager module.
- **Materials** - Add billable items and expenses which were used 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

- 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

Service Desk > Tickets > My Tickets

OPEN **Power Connection Problem #1108**
Reporter: Dyanorat481

Schedule **Process** Add Material Edit Close Delete More

Ticket Information

Priority :	Normal	User:	Dyanorat481 (86)
Department :	Maintenance	Email:	dyanorat481@gmail.com
Create Date :	Thu, Feb 21 2019 10:1	Customer :	-

The 'Process Ticket' pane appears.

Process Ticket #787

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

Issue Summary:*

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

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

Ticket Source:

Category:

Sub Category Level 1:

Department:

SLA Plan:

Time Spent: 0 hrs 0 min

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


Assign The Ticket

Assignee:
Ticket is currently assigned to **Coyote**

Comments:

Collaborators

[Add New Collaborator](#)

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

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

User Information

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

Ticket Information

- **Ticket Source:** The channel through which the ticket was created. The possible values are 'Phone', 'Email', 'Web', 'API' and 'Other'. This is pre-populated and can be updated if required

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

Assign the Ticket

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

Collaborators

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

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

To add an existing user or staff member:

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

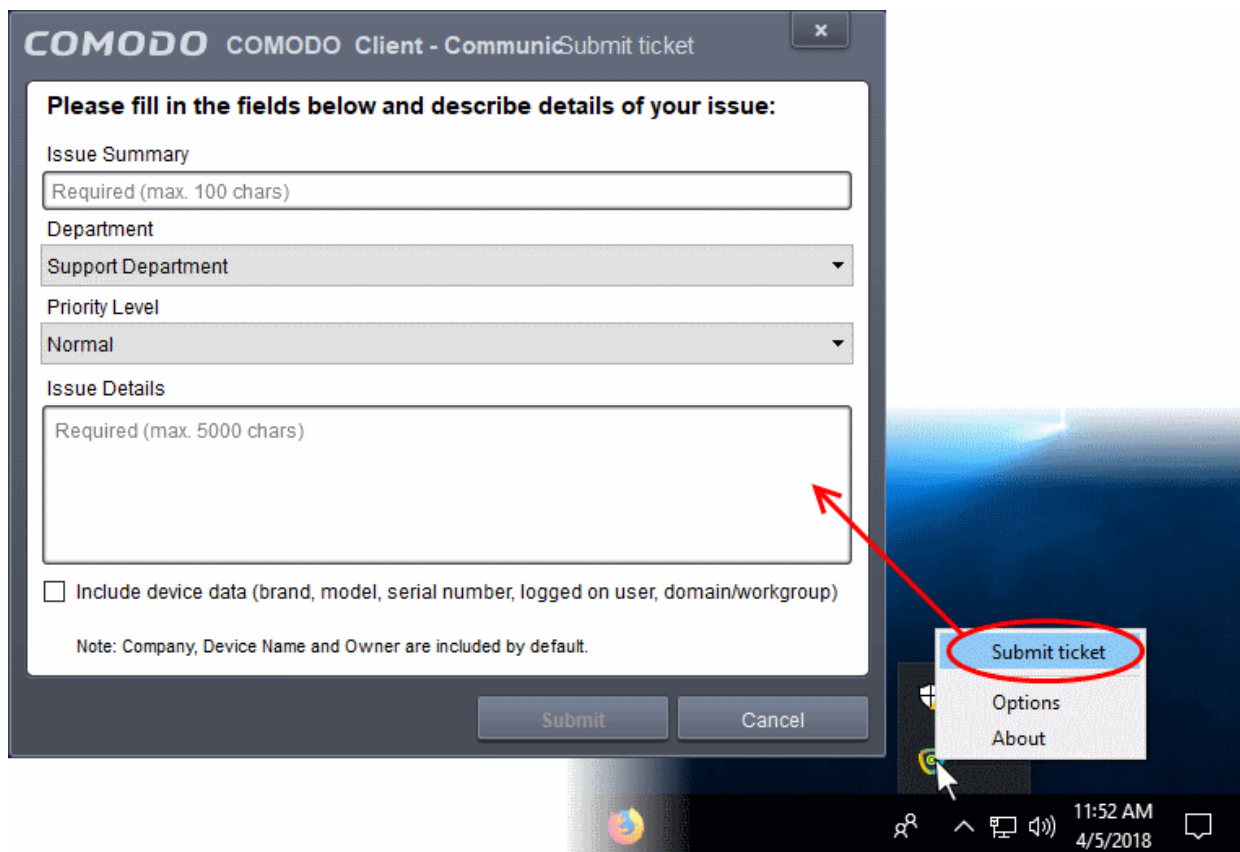
To add a new user:

- Enter their full name, email address and other details
- Click 'Add User'
- Repeat the processes above to add more collaborators
- Click the 'Process' button after you have made your changes. The ticket will be updated per the new details.

Take Remote Control of Windows Endpoint

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

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



COMODO Client - CommuniSubmit ticket

Please fill in the fields below and describe details of your issue:

Issue Summary
Required (max. 100 chars)

Department
Support Department

Priority Level
Normal

Issue Details
Required (max. 5000 chars)

Include device data (brand, model, serial number, logged on user, domain/workgroup)

Note: Company, Device Name and Owner are included by default.

Submit Cancel

Submit ticket
Options
About

11:52 AM
4/5/2018

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

See the following sections for more help:

- [Download and install the Remote Control application](#)
- [Use the desktop application for remote control](#)

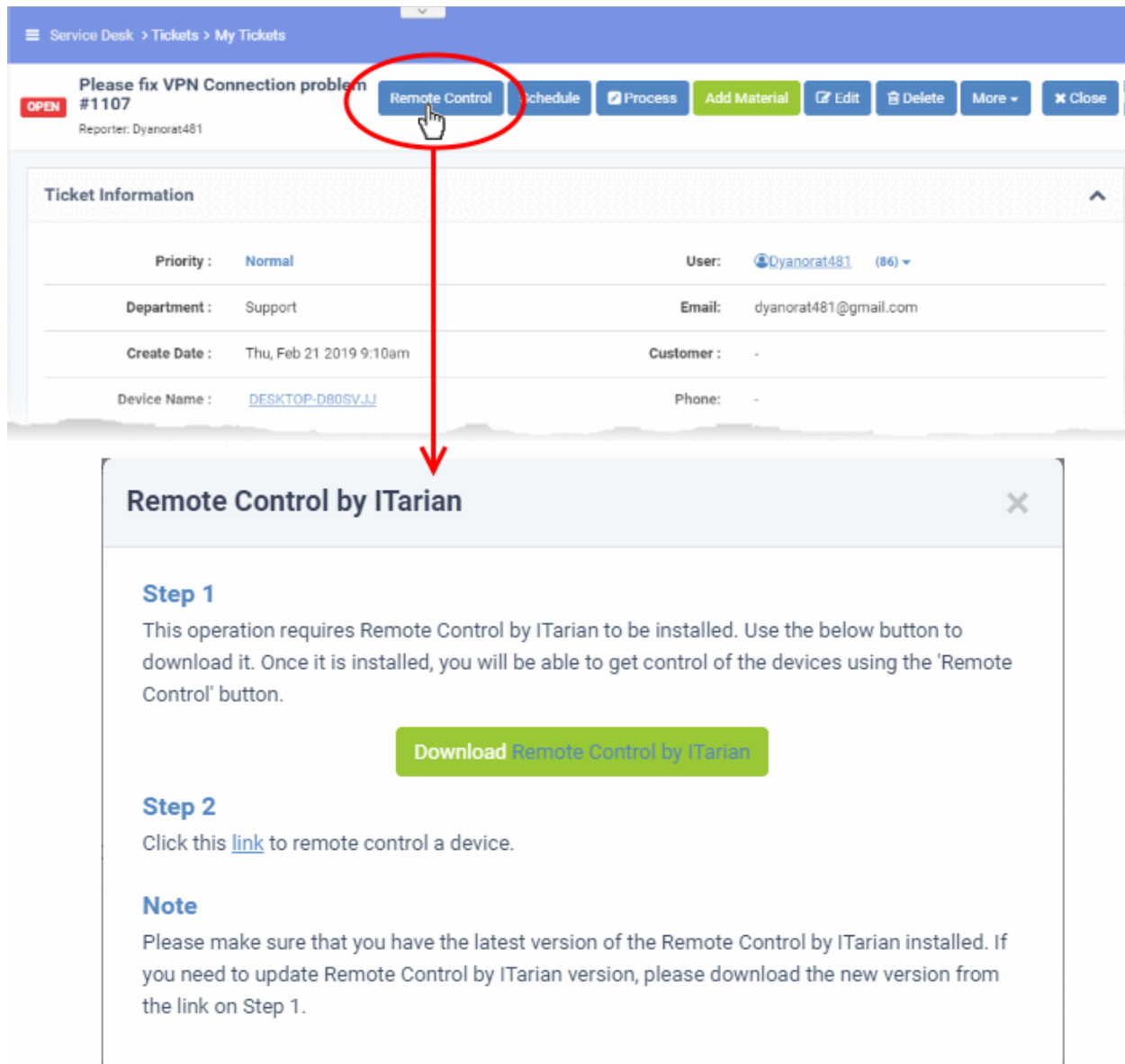
Download and install the Remote Control application

- [Download from Service Desk](#)
- [Download from ITarian console](#)

Download RC from Service Desk

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

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



The screenshot shows a Service Desk interface. At the top, there is a navigation bar with 'Service Desk > Tickets > My Tickets'. Below this, a ticket card is displayed for 'Please fix VPN Connection problem #1107' with a red 'OPEN' status and 'Reporter: Dyanorat481'. A row of action buttons is visible: 'Remote Control', 'Schedule', 'Process', 'Add Material', 'Edit', 'Delete', 'More', and 'Close'. The 'Remote Control' button is circled in red, and a red arrow points from it to a modal window titled 'Remote Control by ITarian'. The modal window contains the following content:

Remote Control by ITarian [Close]

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

[Download Remote Control by ITarian](#)

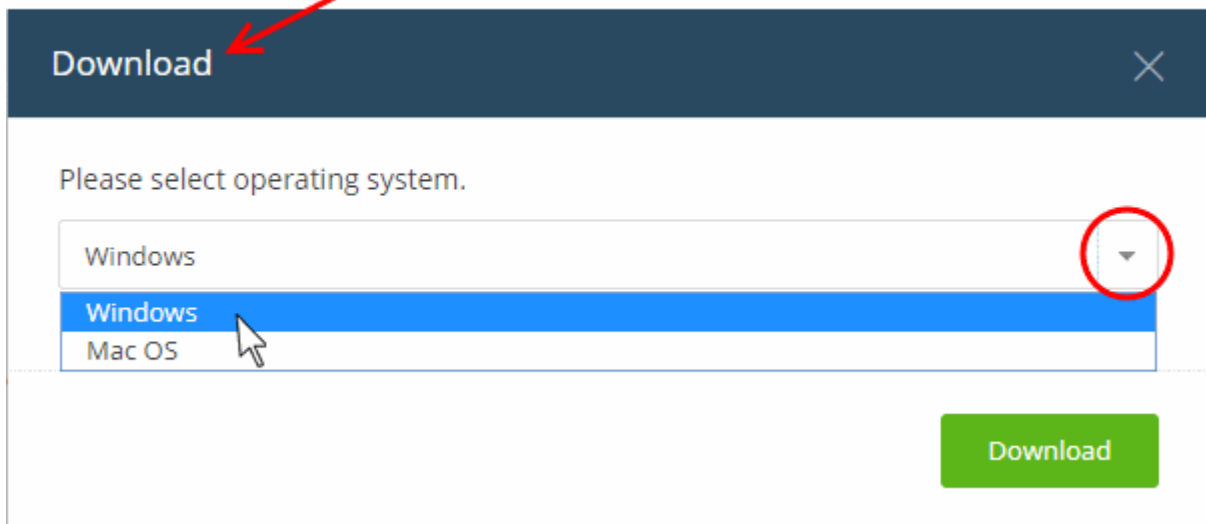
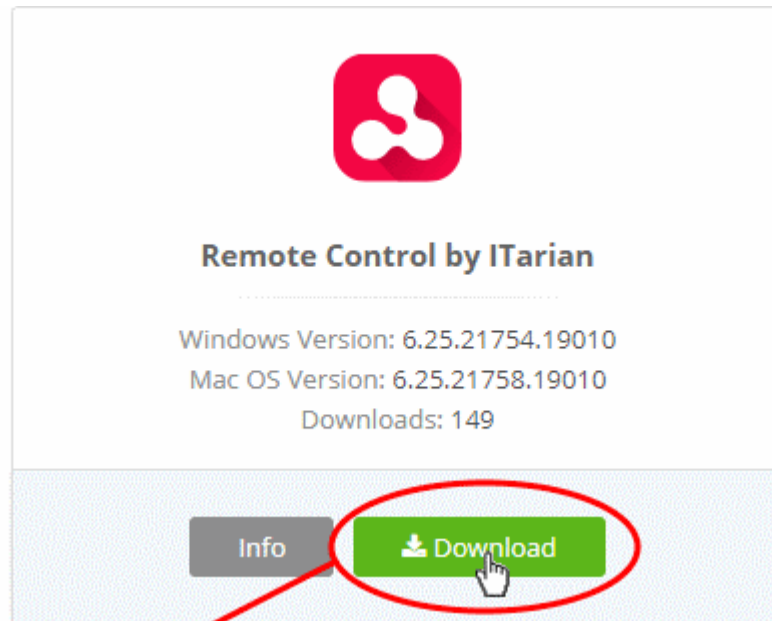
Step 2
Click this [link](#) to remote control a device.

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

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

Download RC from ITarian Console

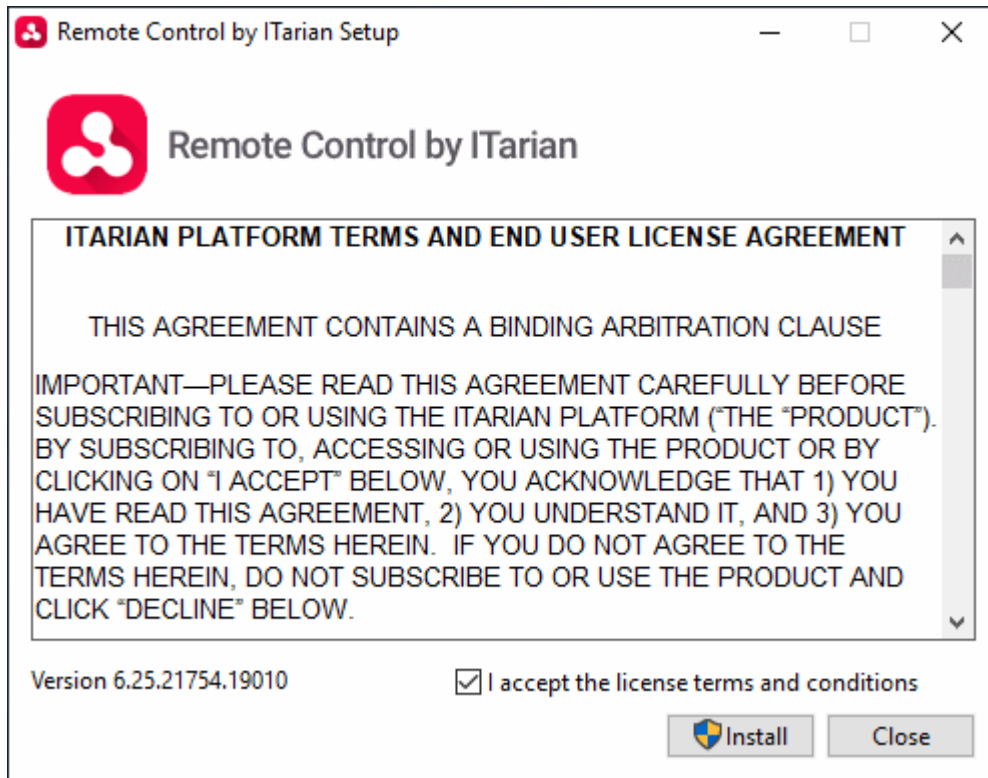
- Login to your ITarian account and click 'Tools' at the top
- The 'Tools' interface displays a list of productivity and security tools available for download from ITarian as tiles
- Click the 'Download' button in the 'Remote Control by ITarian' tile:



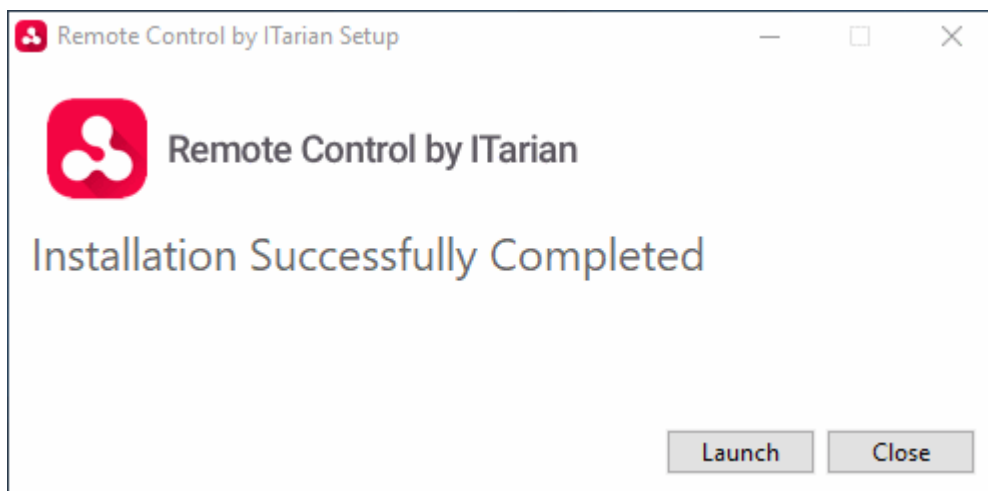
- Select the operating system of your admin machine, click 'Download' and save the setup file.

Install the application

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



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



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

Use the Desktop Application for Remote Control

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

Take remote control of a Windows device

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

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

Remote Control by ITarian

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

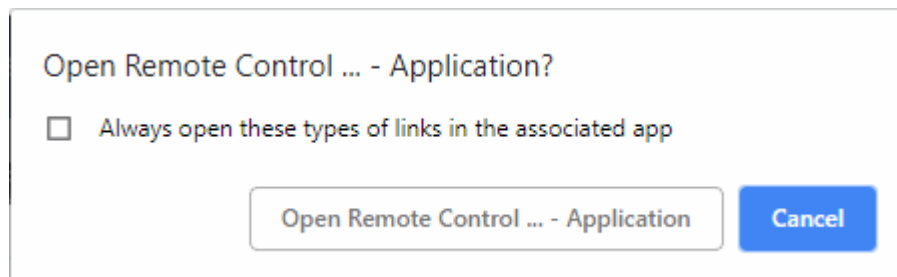
[Download Remote Control by ITarian](#)

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

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

- Click 'link' under step 2:

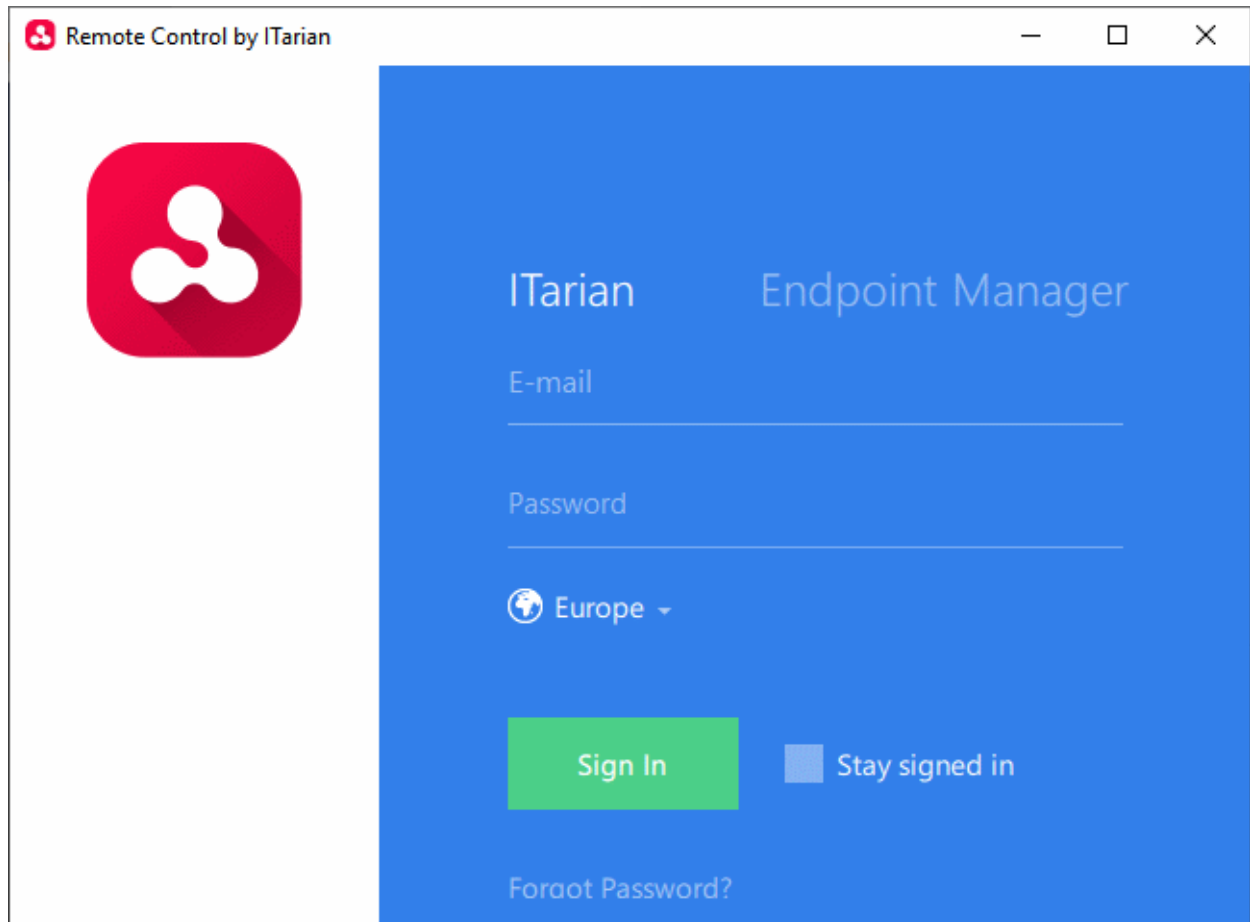
Next, you need to select the application to open the link.



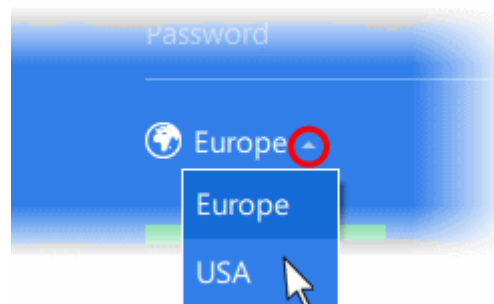
- Click 'Open Remote Control by ITarian'.

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

The RC application starts:

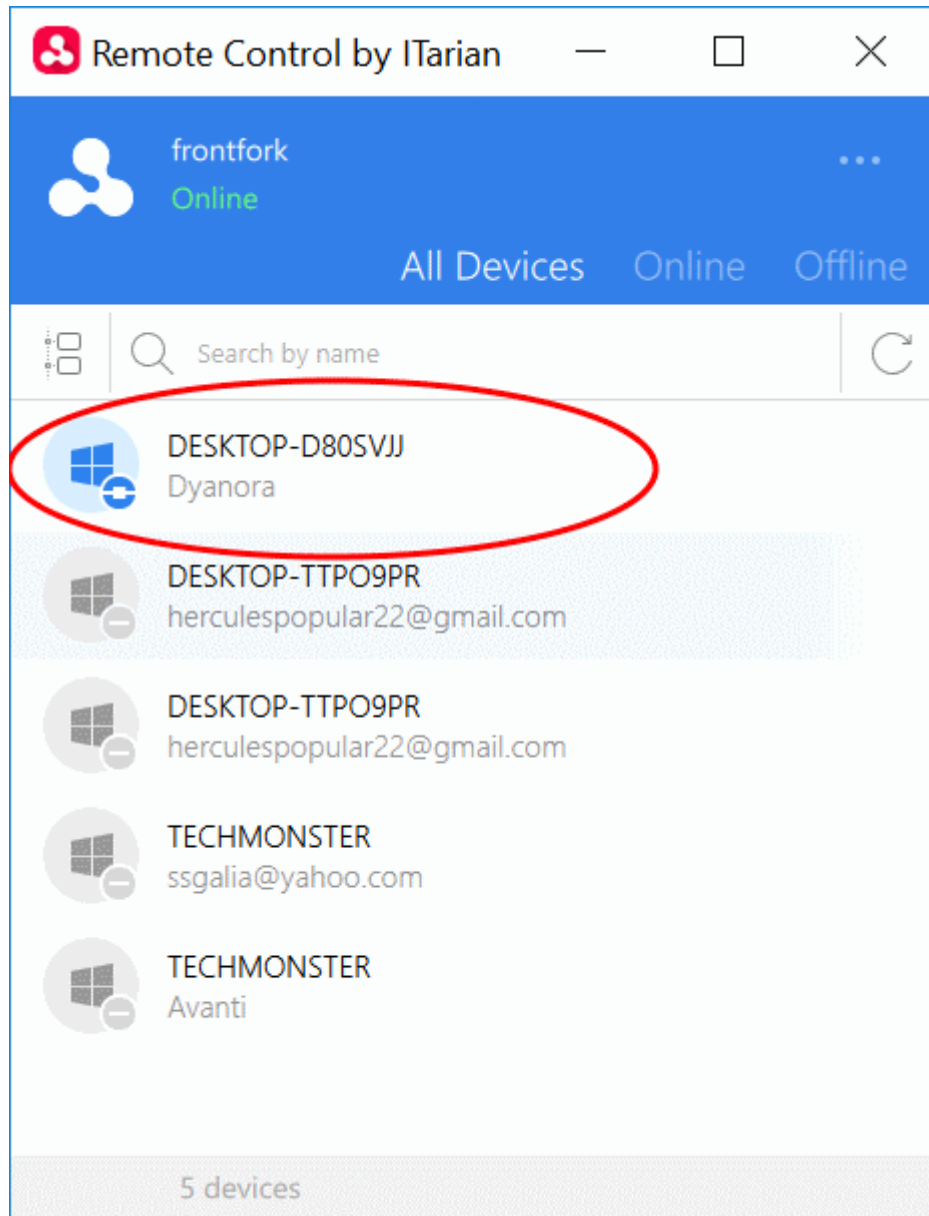


- Click the 'ITarian' tab then enter your ITarian username and password
- The region selector allows you to choose the ITarian hosted service closest to your location. Select the location nearest to you for the best performance / fastest connection.





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

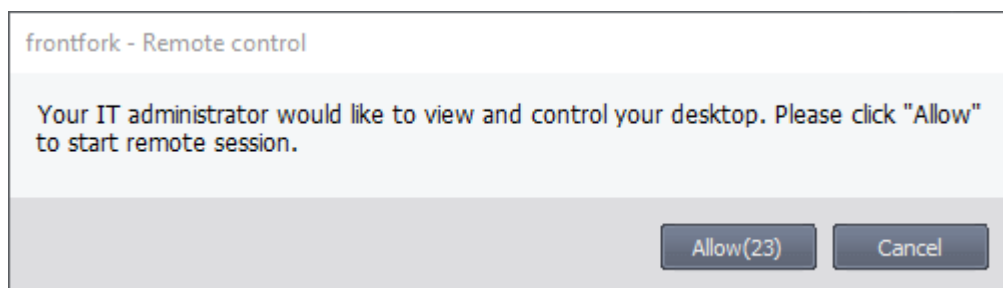
The application opens with a list of devices added to Endpoint Manager. The endpoint associated with the ticket is pre-selected for remote desktop connection:



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

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

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

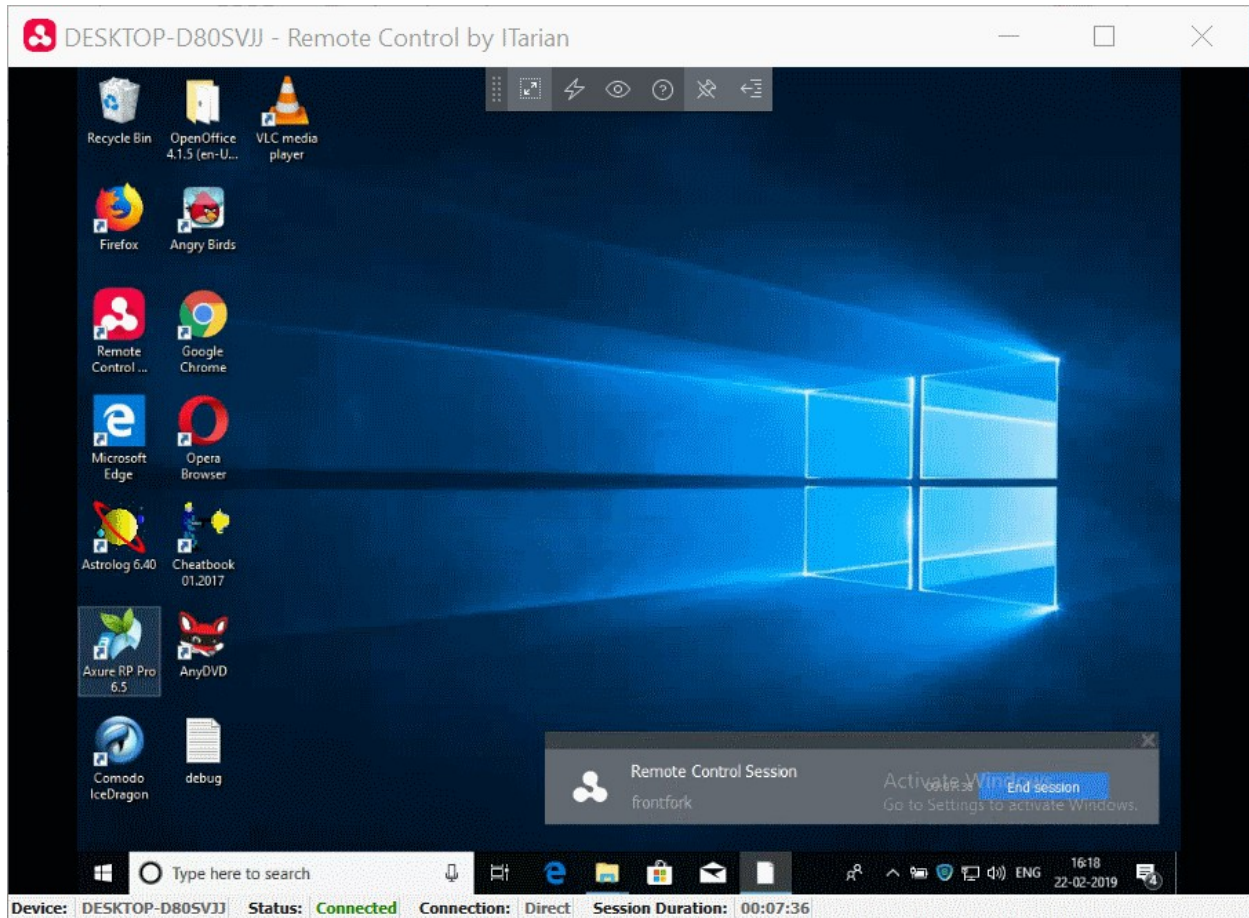


- The connection is established once the user clicks 'Allow', or if the does not respond within 30 seconds.
- The following notification appears once the session is active:



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

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

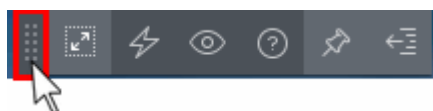


- You can now interact with the target device to perform tasks as required.
- The client interface contains the following menus and settings:



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

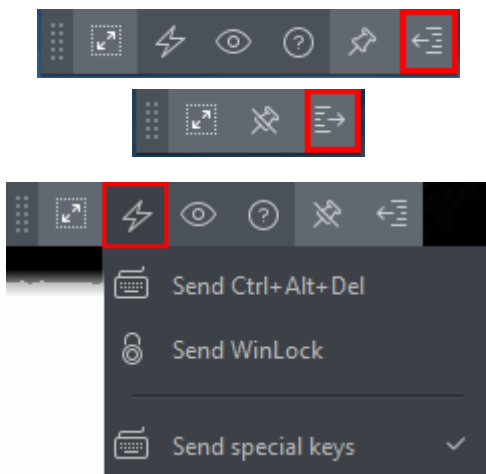
- Click the same icon to exit full screen mode



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



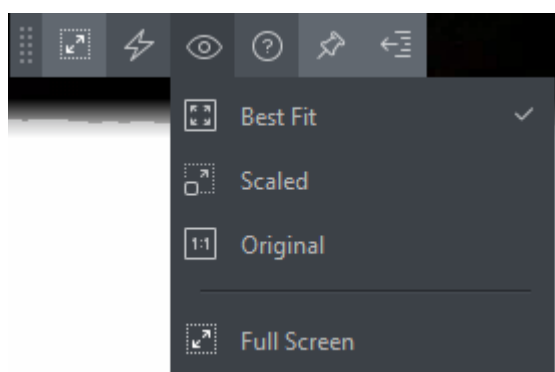
Pin - Pin or unpin the tool bar to the title bar in full screen view.



Minimize/Maximize - Show/hide tool bar options.

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

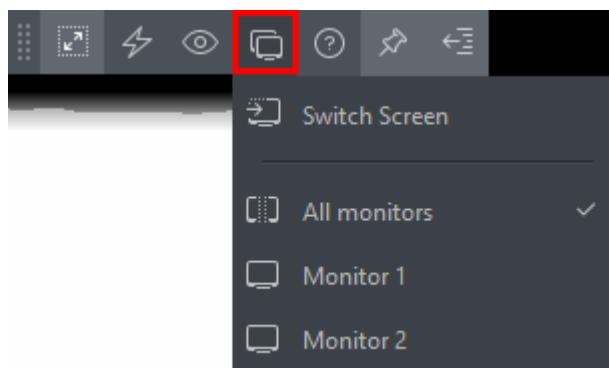
- **Send Ctrl + Alt + Del** - Opens the Windows security screen. This allows you to lock the computer, log the current user out of the remote machine, change passwords, view the local task manager or shut down/restart/hibernate the machine.
- **Send WinLock** - Locks the managed endpoint. A password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



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

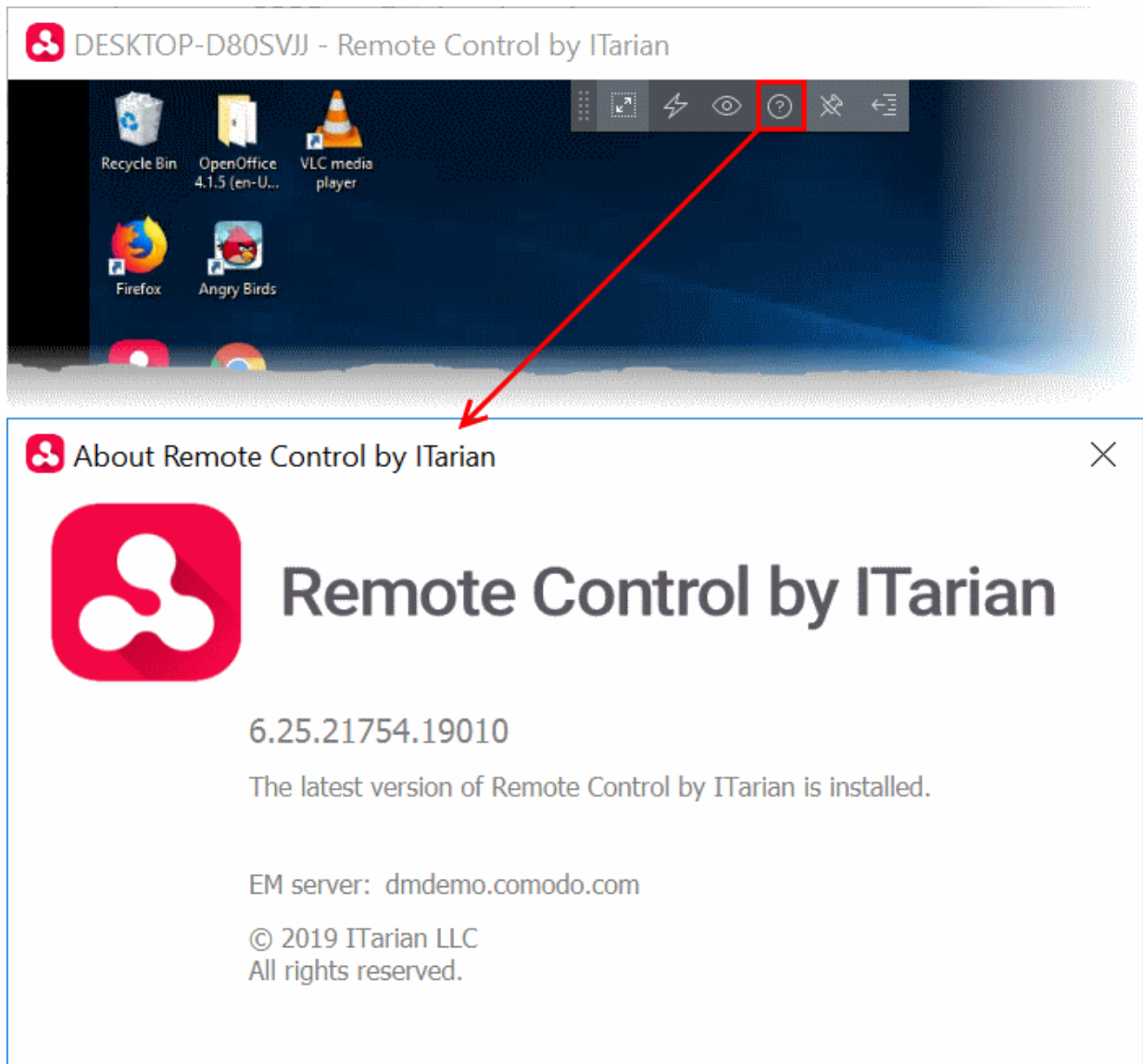
- **Best Fit** - Automatically adjusts the screen resolution for the best visual experience.
- **Scaled** - Displays the target desktop with the resolution of the admin computer
- **Original** - Displays the target desktop at its own resolution
- **Full screen** - Displays the remote desktop in full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

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



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

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



Add Materials to the ticket

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

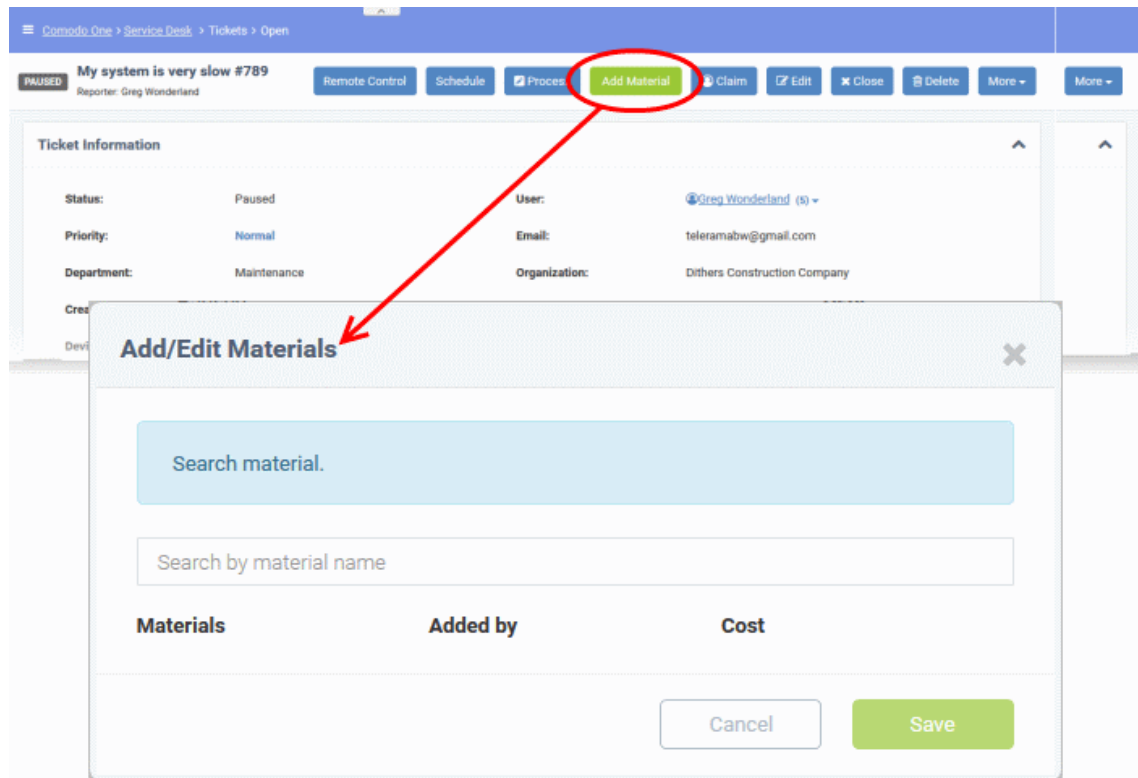
- Materials and expenses added to a ticket need to be approved by an administrator. Only then will they be charged to the customer.
- The 'Material Details' pane in the 'Ticket Details' interface shows all existing materials on the ticket.

Tip:

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

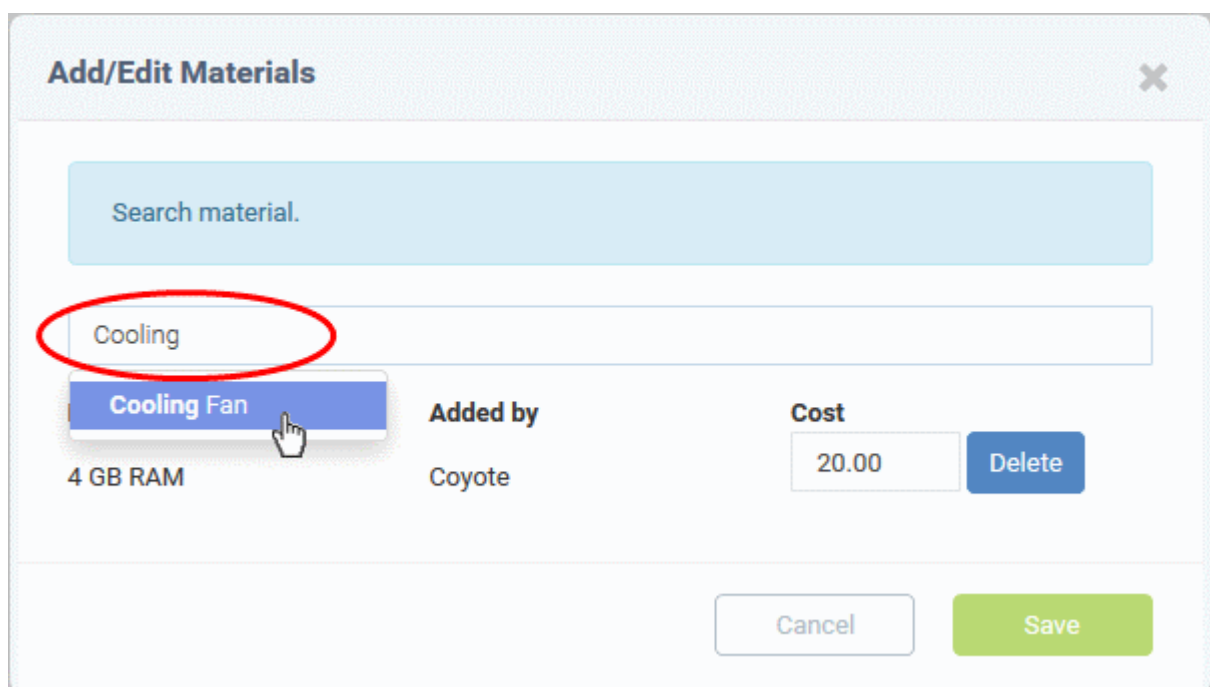
Add materials to a ticket

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



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

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



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

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

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

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

Prices are charged in your account's default currency.

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

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

New items have an approval status of 'Awaiting'.

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

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

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

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

Add/Edit Materials
✕

Search material.

Search by material name

Materials	Added by	Cost	
RJ 45 Network Cable 2 meters	Coyote	5.00	Delete
Meal	Coyote	2.00	Delete
Cooling Fan	Coyote	10.00	Delete
4 GB RAM	Coyote	20.00	Delete

Cancel

Save

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

Create a Schedule for the Ticket

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

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

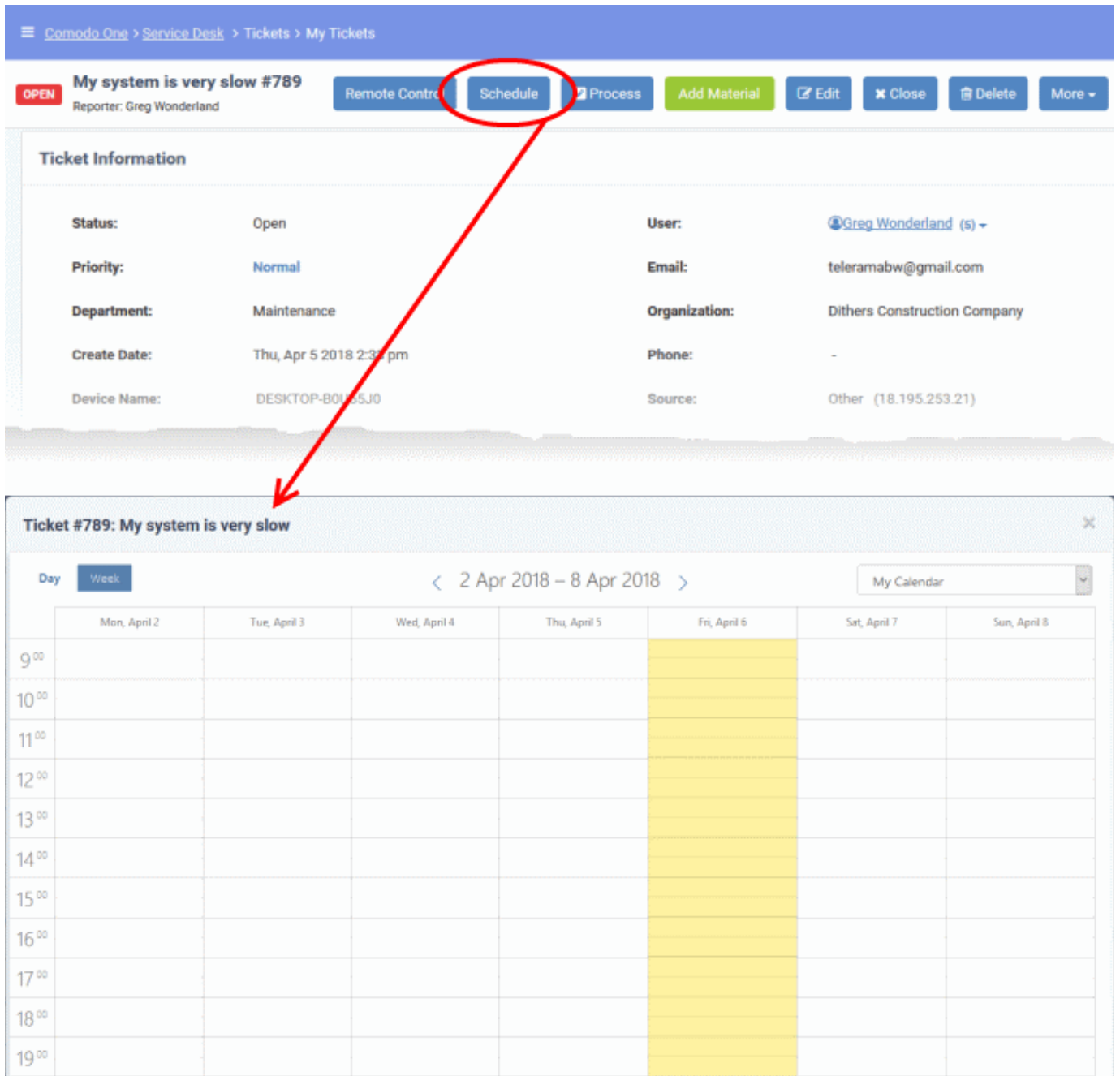
Tip: You can also create a schedule for a ticket without opening it. See [Schedule a Ticket](#) in [Manage Tickets](#) for more details.

To create a schedule for the ticket

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

- Click the 'Schedule' button

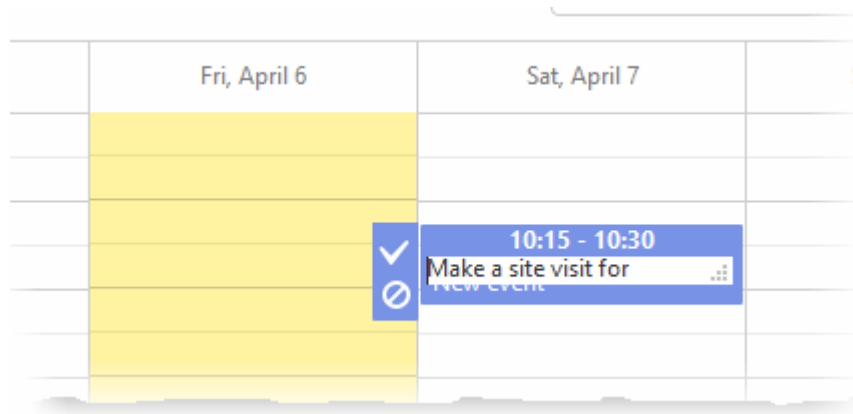
Your calendar will open with the ticket details shown on the title bar:



The screenshot shows the ITarian Service Desk interface. At the top, there is a navigation bar with 'Comodo One > Service Desk > Tickets > My Tickets'. Below this, a ticket card for 'My system is very slow #789' is displayed. The ticket status is 'OPEN' and the reporter is 'Greg Wonderland'. A red circle highlights the 'Schedule' button in the action bar, with a red arrow pointing to the calendar view below.

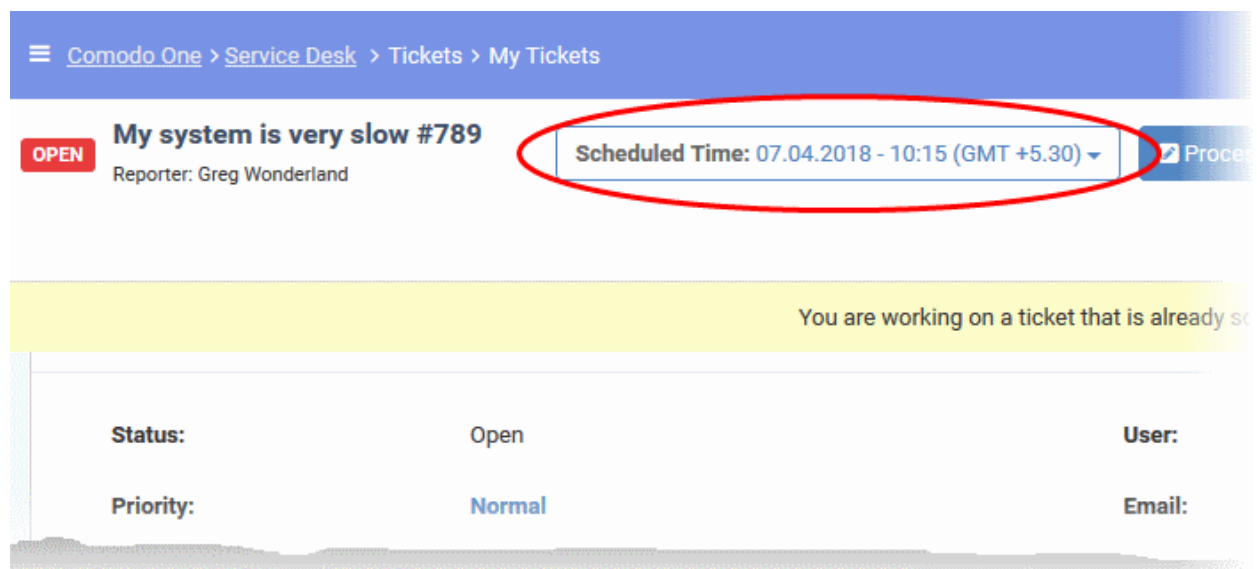
The calendar view is titled 'Ticket #789: My system is very slow'. It shows a weekly view for the week of April 2nd to 8th, 2018. The time slots range from 9:00 to 19:00. The Friday, April 6th column is highlighted in yellow, indicating the selected date for scheduling.

- 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

Comodo One > Service Desk > Tickets > My Tickets

OPEN **My system is very slow #789** **Scheduled Time: 07.04.2018 - 10:15 (GMT +5.30)** **Process**
 Reporter: Greg Wonderland

Reschedule
Delete Schedule

You are working on a ticket that is already sch

Status: Open User:

Appointment Edit ?

Description: Make a site visit for Dagwood

Tickets: 732 john@yopmail.com *

Shared

Full day 10:15 7 April 2018 - 10:30 7 April 2018

Cancel Delete Save

The 'Appointment Edit' dialog will open.

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

Your calendar will be updated with the new schedule/appointment

Ticket #732: My system is very slow

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

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

To remove a schedule

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

Comodo One > Service Desk > Tickets > My Tickets

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

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

Reschedule
Delete Schedule

You are working on a ticket that is already scheduled

Status: Open User:

The page at <https://servicedesk.comodo.com> says:
Selected schedule for ticket will be removed from system.

OK Cancel

- Click 'OK' in the confirmation dialog

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

Create a Knowledgebase article from a ticket

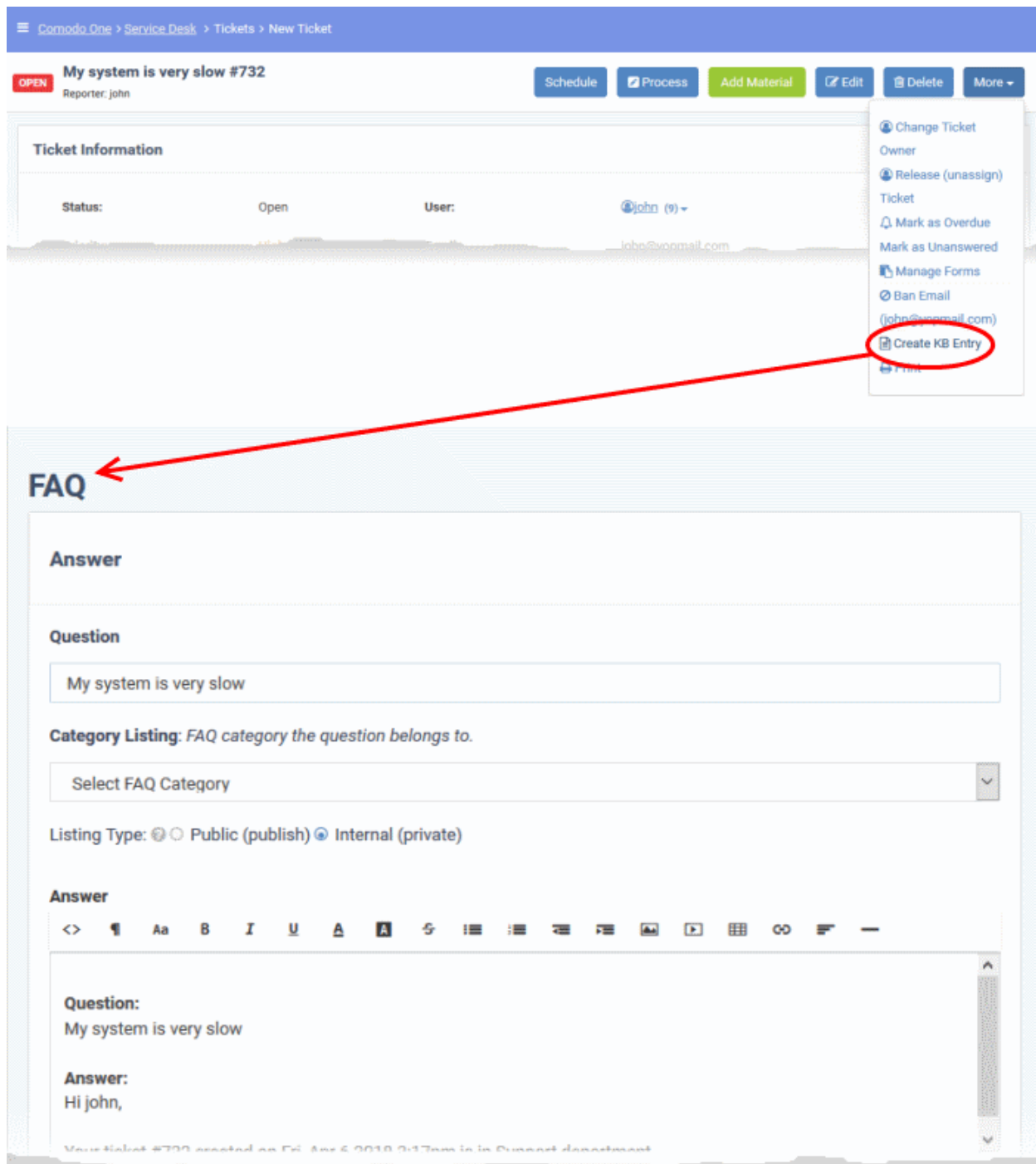
- The 'Knowledgebase' is a repository of support articles, FAQs and useful information intended to assist end-users with answers to common issues.
- It allows users to identify and solve common issues by themselves without needing to create a support

ticket.

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

To add a knowledgebase article from a ticket

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



The screenshot shows the ITarian Service Desk interface. At the top, the breadcrumb navigation reads 'Comodo One > Service Desk > Tickets > New Ticket'. The main header displays the ticket title 'My system is very slow #732' with a status of 'OPEN' and the reporter 'john'. Action buttons include 'Schedule', 'Process', 'Add Material', 'Edit', 'Delete', and 'More'. A dropdown menu is open from the 'More' button, listing various actions: 'Change Ticket', 'Owner', 'Release (unassign)', 'Ticket', 'Mark as Overdue', 'Mark as Unanswered', 'Manage Forms', 'Ban Email', 'Create KB Entry' (highlighted with a red circle), and 'Print'. A red arrow points from the 'Create KB Entry' option to the 'FAQ' section below.

The 'FAQ' section contains the following fields and options:

- Answer**: A text input field.
- Question**: A text input field containing 'My system is very slow'.
- Category Listing**: A dropdown menu with the text 'FAQ category the question belongs to.' and the option 'Select FAQ Category'.
- Listing Type**: Radio buttons for 'Public (publish)' and 'Internal (private)', with 'Internal (private)' selected.
- Answer**: A rich text editor with a toolbar and a preview area. The preview shows:

Question:
My system is very slow

Answer:
Hi john,

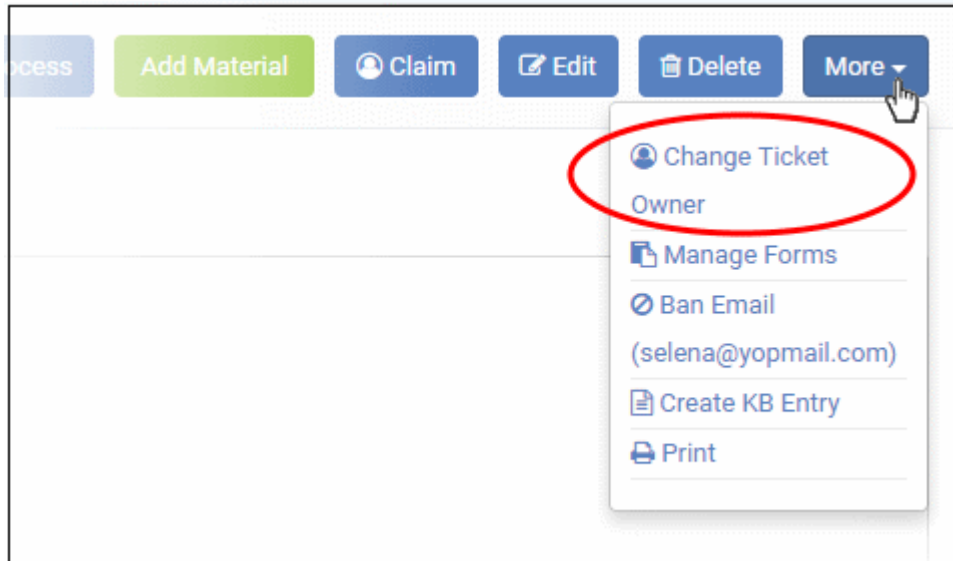
The **FAQ** screen will appear. This screen allows staff to select the category under which the FAQ will be placed. You can also specify articles which are related to the FAQ, and choose to make the FAQ 'Public' or 'Internal'. See **FAQs** for more details.

Change the ticket owner

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

To change the ticket owner

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




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

The 'Change user for ticket' dialog will open:

Change user for ticket #789 ✕

? Search existing users or add a new user.

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

Contact Information

Phone Number:

Internal Notes: Network connection

Cancel Continue


You can change the user in two ways:

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

Change user for ticket #789 [X]

Search existing users or add a new user.

Search by email, phone or name

 **Greg Wonderland**
teleramabw@gmail.com
Dithers Construction Company

Add New User

Change user for ticket #789 [X]

Search existing users or add a new user.

Search by email, phone or name

Create New User: Please provide all the details

Email Address: *

Full Name: *

Phone Number: Ext:

Internal Notes:

Cancel Reset **Add User**

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

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

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

See '[Add a user to a customer company](#)' in [Manage Users](#) more details.

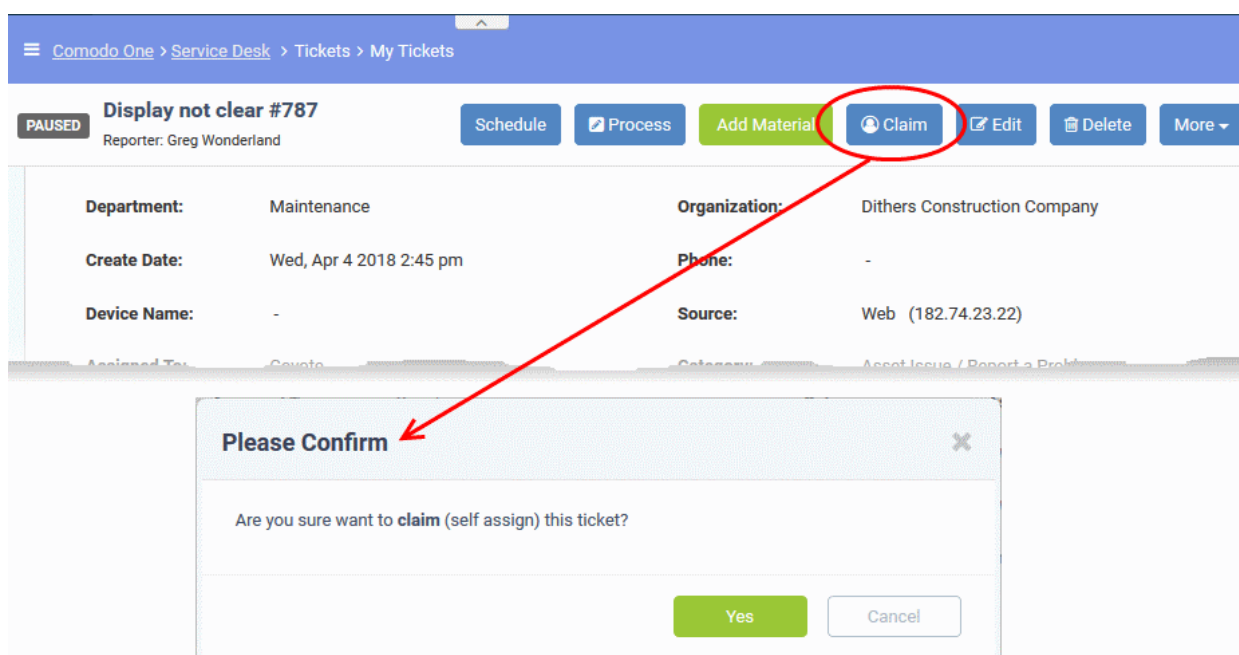
Claim / Self-assign a ticket

Unassigned tickets can be claimed in two ways:

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

To claim a ticket

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



The screenshot shows the ITarian Service Desk interface. At the top, there is a breadcrumb trail: Comodo One > Service Desk > Tickets > My Tickets. Below this, the ticket title is 'Display not clear #787' with a 'PAUSED' status and 'Reporter: Greg Wonderland'. Action buttons include 'Schedule', 'Process', 'Add Material', 'Claim' (circled in red), 'Edit', 'Delete', and 'More'. The ticket details section shows: Department: Maintenance, Organization: Dithers Construction Company, Create Date: Wed, Apr 4 2018 2:45 pm, Phone: -, Device Name: -, Source: Web (182.74.23.22). A 'Please Confirm' dialog box is overlaid on the screen, asking 'Are you sure want to claim (self assign) this ticket?' with 'Yes' and 'Cancel' buttons. A red arrow points from the 'Claim' button to the dialog box.

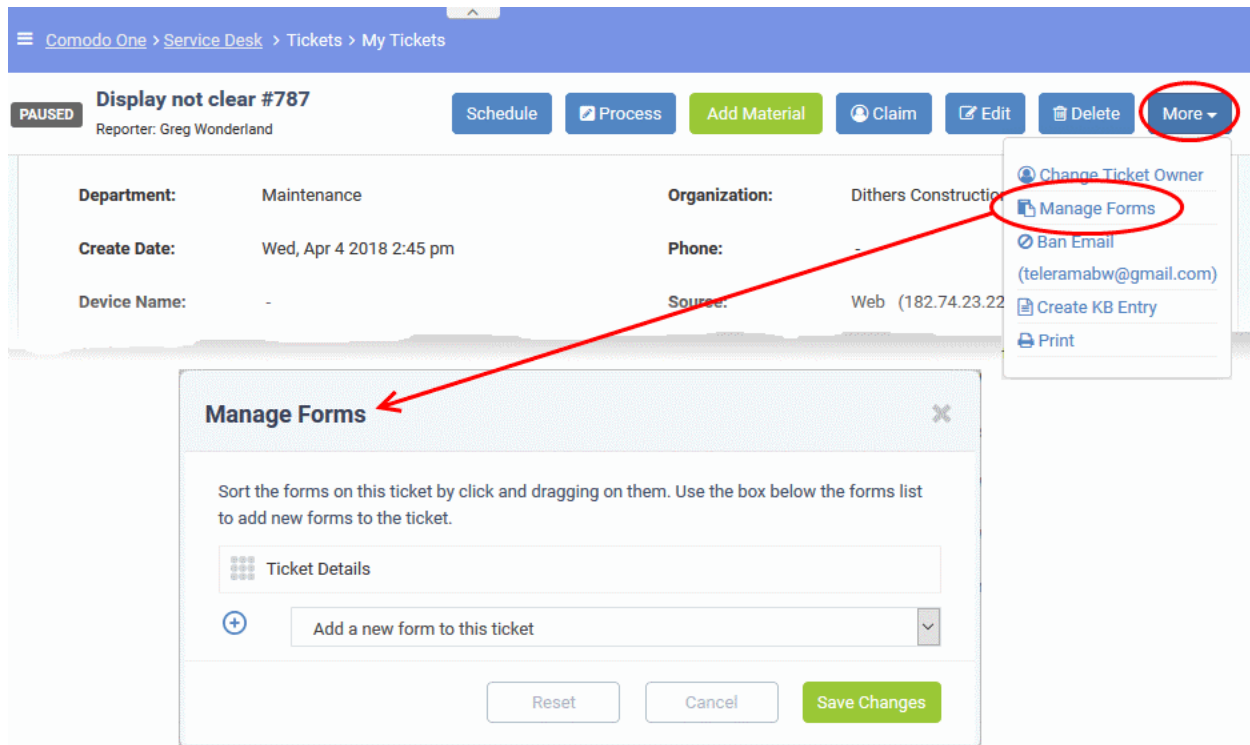
- Click 'Yes' in the confirmation screen to claim the ticket.

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'.



Comodo One > Service Desk > Tickets > My Tickets

PAUSED **Display not clear #787**
Reporter: Greg Wonderland

Schedule Process Add Material Claim Edit Delete **More**

Department: Maintenance Organization: Dithers Constructio
Create Date: Wed, Apr 4 2018 2:45 pm Phone:
Device Name: Source: Web (182.74.23.22)

- Change Ticket Owner
- Manage Forms**
- Ban Email (teleramabw@gmail.com)
- Create KB Entry
- Print

Manage Forms

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

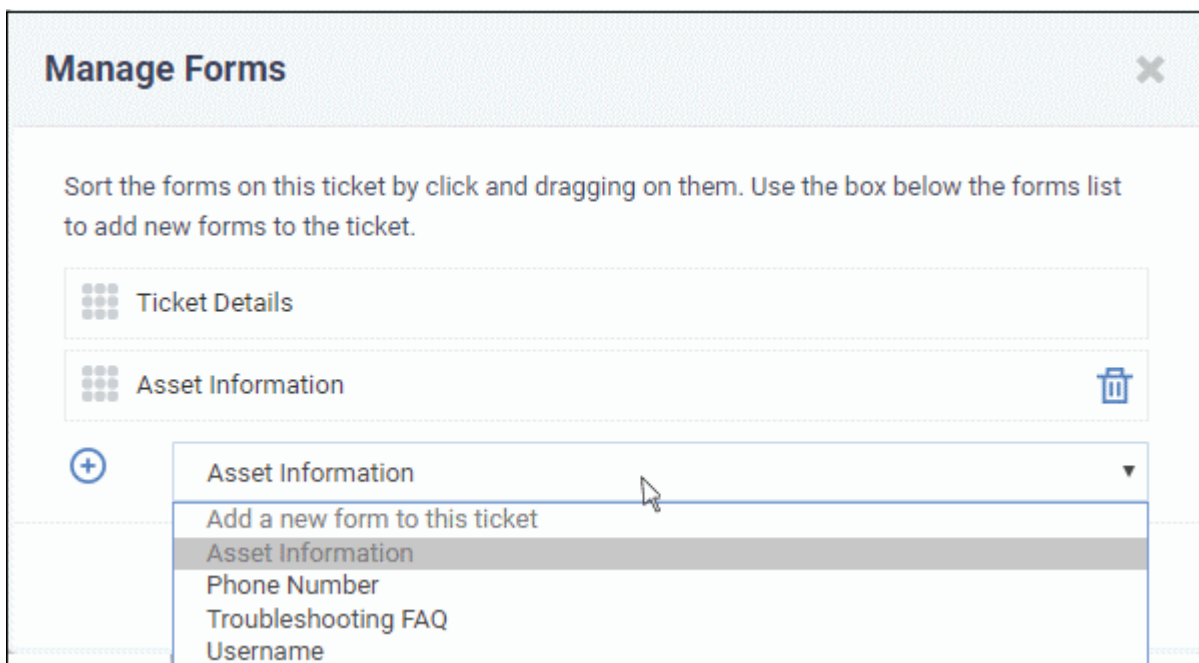
Ticket Details

+ Add a new form to this ticket

Reset Cancel Save Changes

The 'Manage Forms' screen will open:

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



Manage Forms

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

Ticket Details

Asset Information

+ Asset Information

- Add a new form to this ticket
- Asset Information**
- Phone Number
- Troubleshooting FAQ
- Username

- Click the 'Save Changes' button.

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

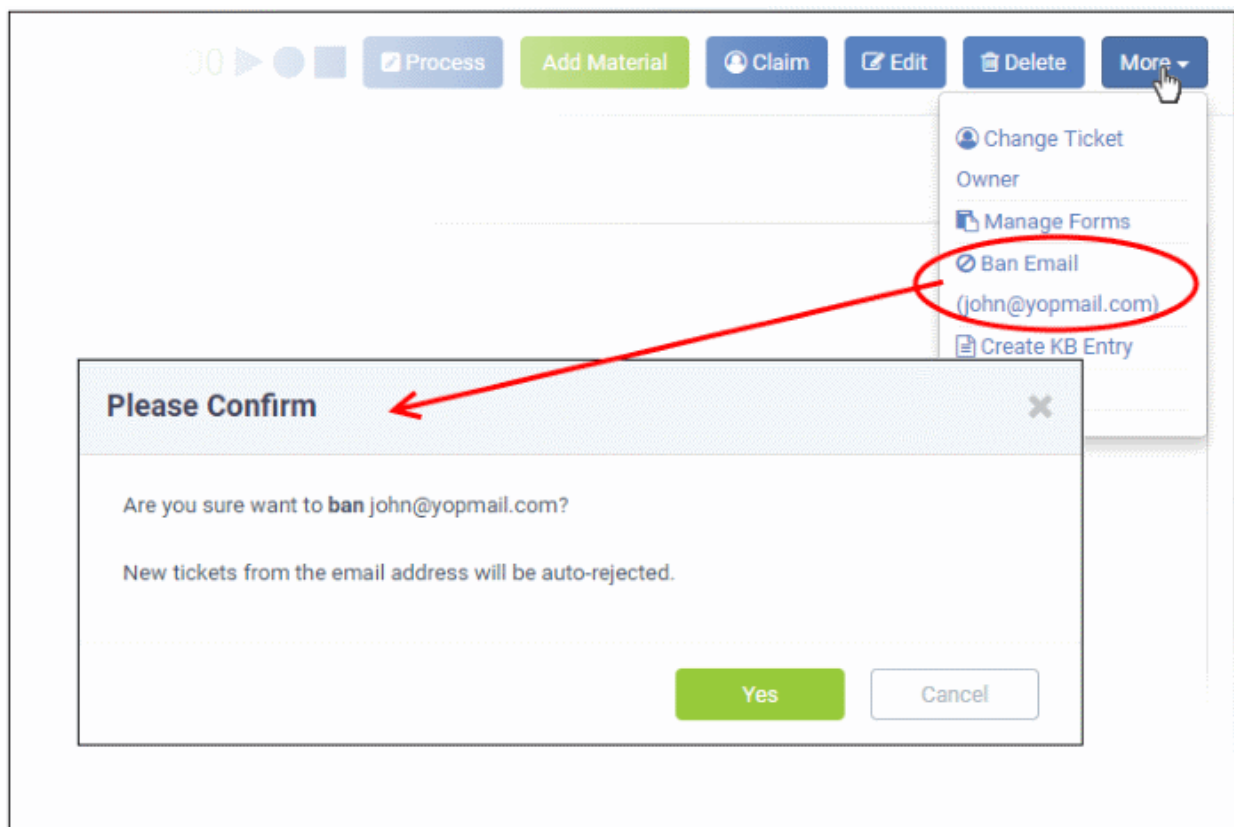
- To remove a form from a ticket, click the 'Manage Form' button then click the trash can icon beside the form.
- Click the 'Save Changes' button at the bottom.

Block email ID of a user

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

To block a user

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



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

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

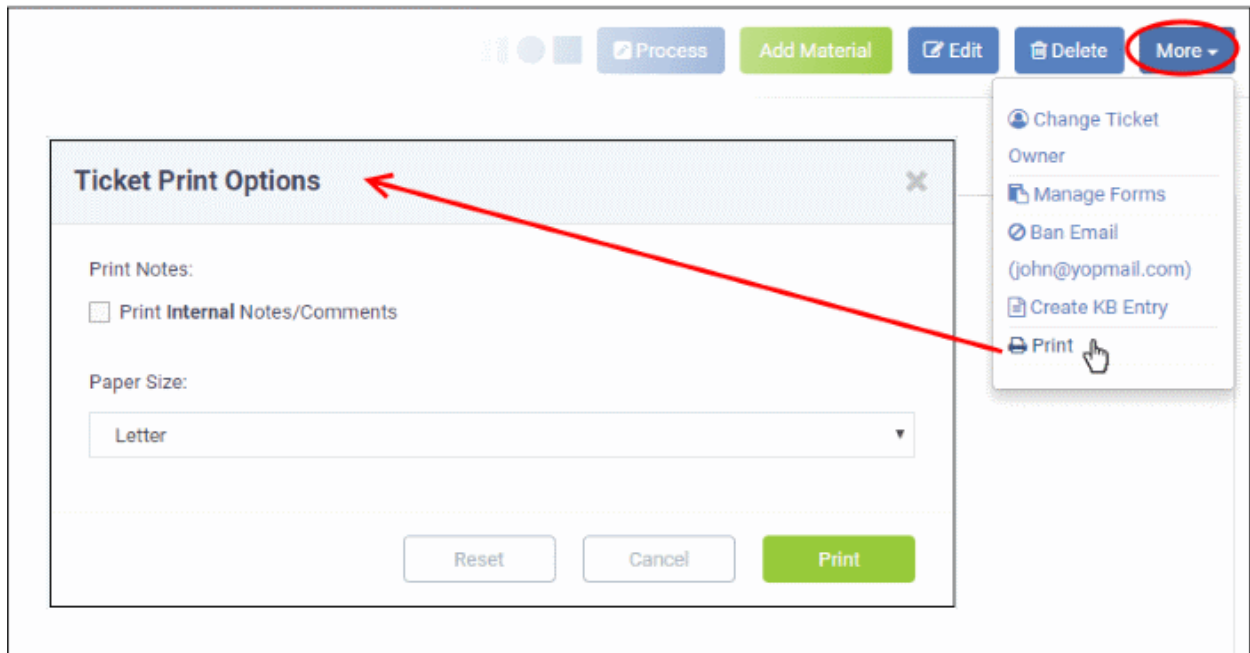
Print a Ticket

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

To print a ticket

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

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



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

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

SUPPORT CENTER

Support Ticket System

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

Ticket #22

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

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

Ticket Details

Asset Type Printer

Time Spent (GMT 5.30)

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

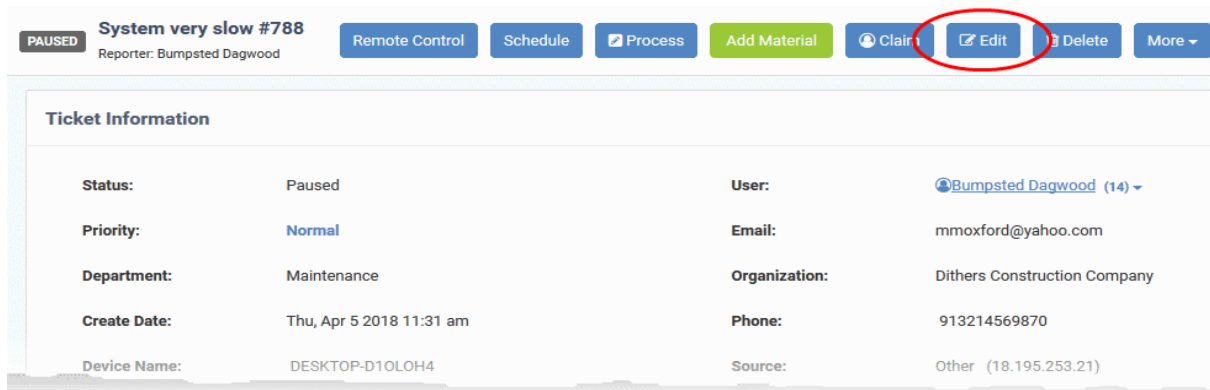
- Save the file for your future reference and/or print the ticket from the pdf file.

Edit a ticket

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

Edit a ticket

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



The screenshot displays the ITarian Service Desk interface for a ticket titled "System very slow #788". The ticket status is "PAUSED" and the reporter is "Bumpsted Dagwood". A toolbar at the top contains several action buttons: "Remote Control", "Schedule", "Process", "Add Material", "Claim", "Edit", "Delete", and "More". The "Edit" button is circled in red. Below the toolbar, the "Ticket Information" section is visible, showing the following details:

Field	Value
Status	Paused
Priority	Normal
Department	Maintenance
Create Date	Thu, Apr 5 2018 11:31 am
Device Name	DESKTOP-D1OLOH4
User	Bumpsted Dagwood (14)
Email	mmoxford@yahoo.com
Organization	Dithers Construction Company
Phone	913214569870
Source	Other (18.195.253.21)

The 'Update Ticket' screen will appear:

Update Ticket #788

User Information: Currently selected user

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

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

Ticket Source: * ▼

Category: ▼

Department: ▼

SLA Plan: ▼

Time Spent: 0 hrs 30 min

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

Ticket Details: Please Describe Your Issue

Issue Summary: * ↕

Priority Level: * ▼

Asset Type: ▼

Ticket Type: ▼

Ticket Type Sub Category:

Internal Note: Reason for editing the ticket (required)

Save
Reset
Cancel

User Information


Details about the user who submitted the ticket, or on whose behalf the ticket was submitted. This user is also known as the 'Owner' of the ticket. You change the ticket owner from this area.

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

Change user for ticket #788 ✕

ⓘ Search existing users or add a new user.

Search by email, phone or name



Bumpsted Dagwood

moxford@yahoo.com

Dithers Construction Company

Add New User

Contact Information

Phone Number: 913214569870

Internal Notes:

Cancel

Continue

Tip: New users will be added as guest users.

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

Ticket Information

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

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

Ticket Source: *

Category:

Department:

SLA Plan:

Time Spent: 0 hrs 30 min

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

Ticket Summary: Please Describe Your Issue

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

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

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

Ticket Details

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

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

- Change the sub-category, if required.

Internal Note

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

- Click the 'Save' button to update the ticket

Close and Reopen tickets

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

Notes:

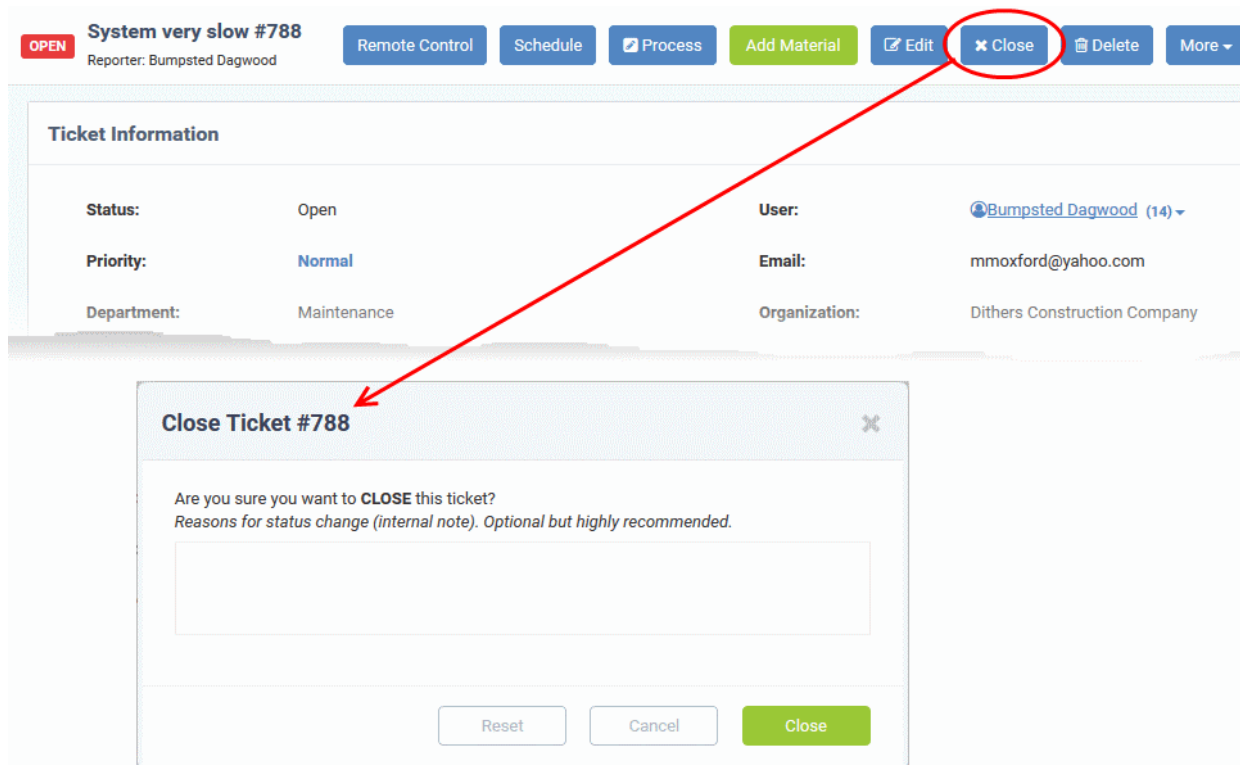
- You can close a ticket only if it has an 'Open' status. 'Paused' tickets cannot be closed. If required, you can resume the ticket and close it. See [Pause and resume a ticket](#) if you need help with this.
- Staff members can only close tickets that are assigned to them
- Admins can close tickets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

You can close a ticket in two ways:

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

To manually close a ticket

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



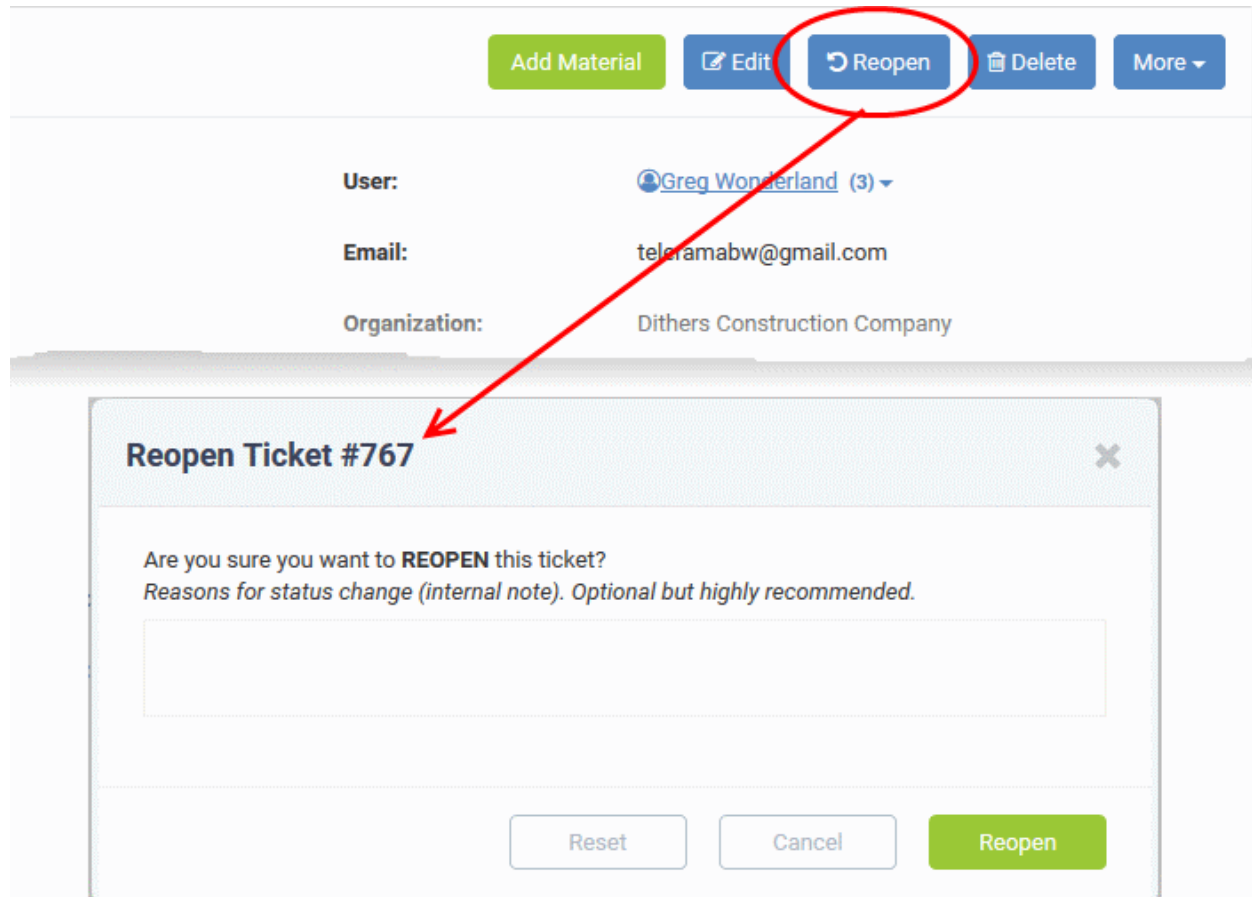
The screenshot shows the iTarian Service Desk interface for ticket #788. At the top, there is a navigation bar with buttons: OPEN, System very slow #788, Reporter: Bumpsted Dagwood, Remote Control, Schedule, Process, Add Material, Edit, Close (circled in red), Delete, and More. Below this is the 'Ticket Information' section with fields for Status (Open), Priority (Normal), Department (Maintenance), User (Bumpsted Dagwood (14)), Email (mmoxford@yahoo.com), and Organization (Dithers Construction Company). A modal dialog box titled 'Close Ticket #788' is open, containing the text: 'Are you sure you want to CLOSE this ticket? Reasons for status change (internal note). Optional but highly recommended.' Below the text is a text input field and three buttons: Reset, Cancel, and Close.

- Enter the reason and click 'Close'

Re-open a closed ticket

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

The 'Reopen Ticket' screen will be displayed:



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

- 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

System very slow #788
Reporter: Bumpsted Dagwood

Remote Control Schedule Process Add Material Edit Close **Delete** More

Ticket Information

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

Please Confirm

Are you sure you want to DELETE this ticket?

Deleted tickets CANNOT be recovered, including any associated attachments.

Please confirm to continue.

Yes Cancel

- Click 'Yes' in the confirmation screen.

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

Pause and resume a Ticket

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

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

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

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

Attachments: Browse... No file selected.

Time Spent: 00:31:42 [Pause]

Service Type: * -- Select -- [v] Billable

Signature: None

Attachments: Browse... No file selected.

Time Spent: 00:32:11 [Play]

Service Type: * -- Select -- [v] Billable

Signature: None

00:32:11 [Play]

The respective internal note screen will be displayed.

Pause Ticket #767 ✕

Are you sure you want to **PAUSE** this ticket?
Reasons for status change (internal note). Optional but highly recommended.

- Click the Pause button after entering the reason.

Resume Ticket #767 ✕


Are you sure you want to **RESUME** this ticket?
Reasons for status change (internal note). Optional but highly recommended.

- Click the Resume button after entering the reason.

Ticket Information

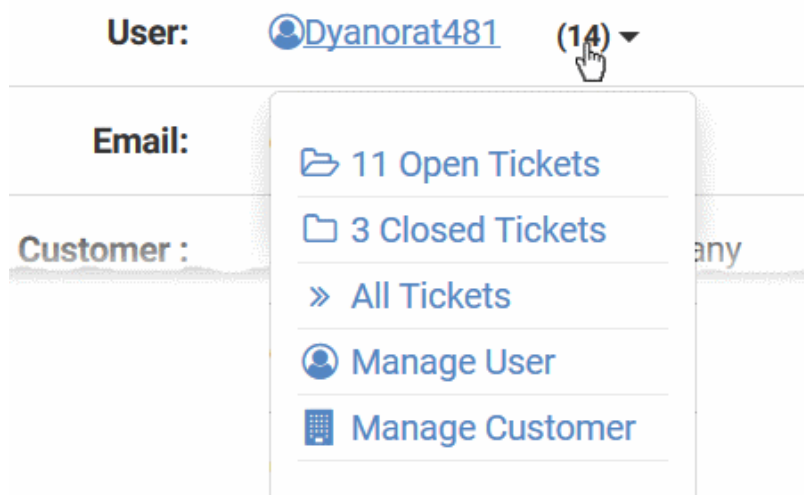
- Click the 'Ticket Information' stripe to open/close the 'Ticket Information' pane
- The 'Ticket Information' pane shows the user who raised the ticket along with ticket status, assigned staff member, due date, billable time, materials and more.
- The number of fields that are displayed depends on the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

Ticket Information ⤴

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

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

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




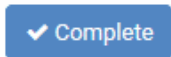
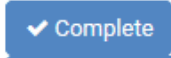

- Email:** The contact email address of the user who created the ticket, or on whose behalf the ticket was created by an agent. Tickets automatically submitted by an endpoint-agent will have the email address of the user for whom the device is enrolled.
- Customer:** The company to which the user belongs.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

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

Ticket Workflow

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

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

Ticket Workflow 		
Name	Status	Action
Stage 1: Generate Quote	In Progress	
Stage 2: Generate Purchase Order	In Progress	 
Stage 3: Delivery of the Asset	Not Started	
Stage 4: Installation on premises	Not Started	
Stage 5: Demo	Not Started	

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

Actions

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

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

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

Ticket Actions ^

Info! Reply posted successfully x

Post ReplyPost Internal NoteDept. TransferAssign Ticket

TO: v

CC: [Add CC](#)

Collaborators: [Add Recipients](#)

Response: * v

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

Attachments:

Signature: None

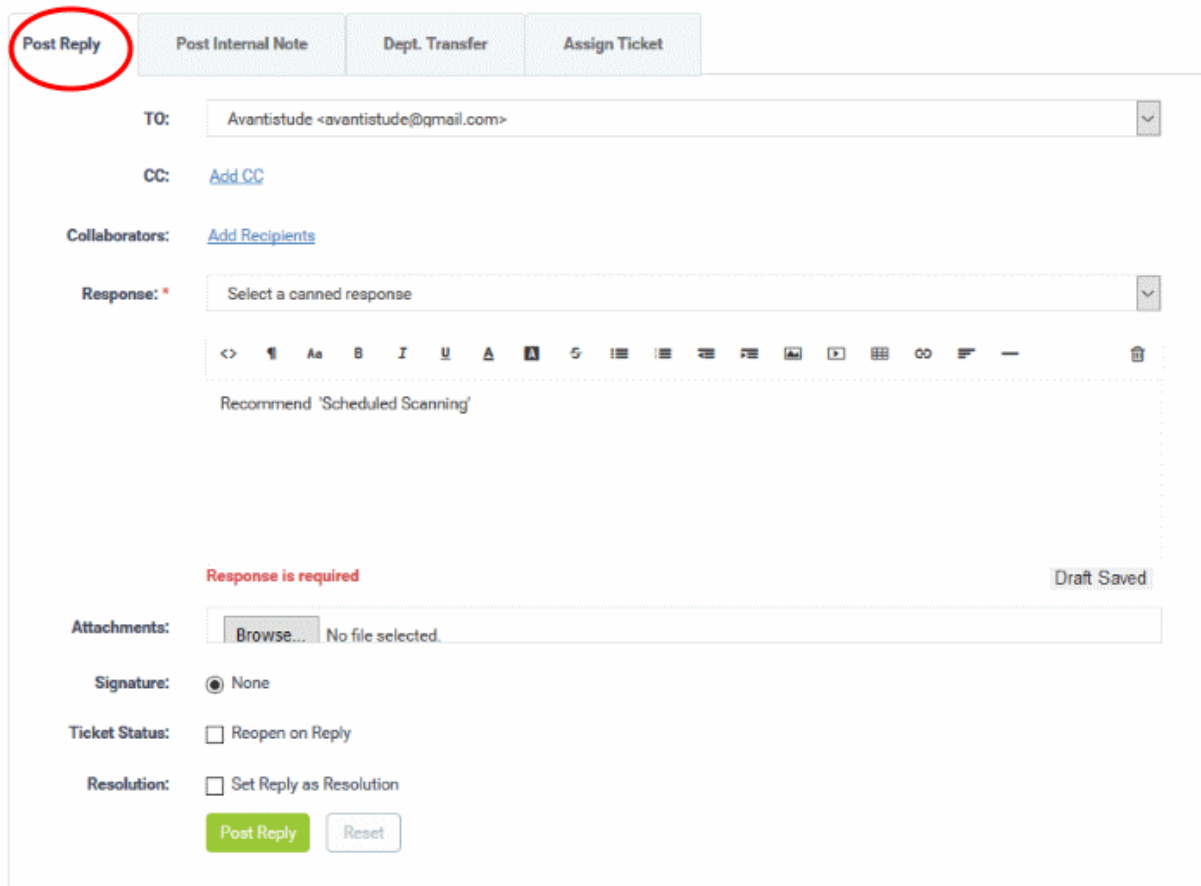
Ticket Status: Reopen on Reply

Resolution: Set Reply as Resolution

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

Post a reply for the ticket

- Click the 'Post Reply' tab

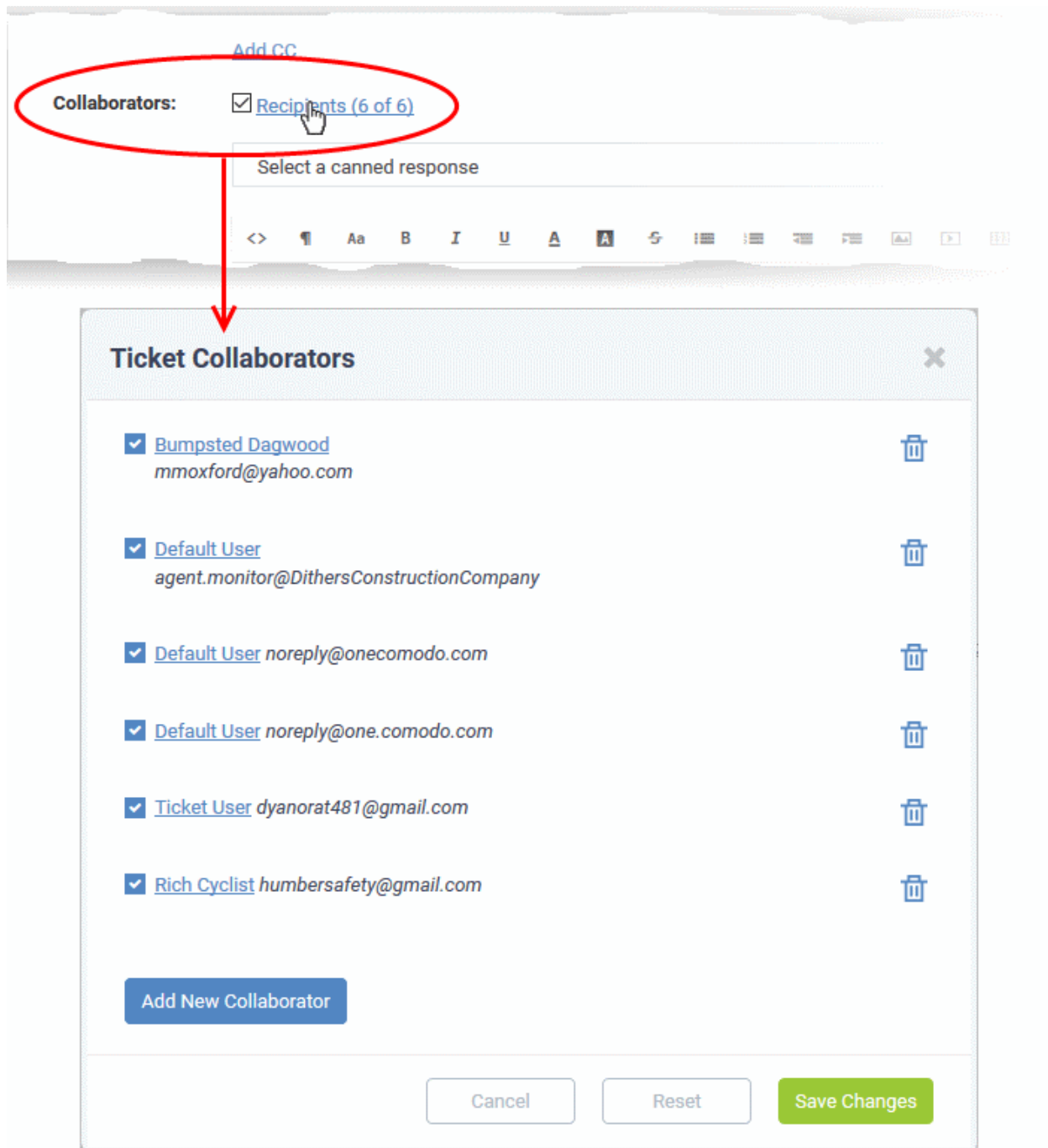


- **From:** The email address used to send the reply to the user. The 'Customers' interface allows you to set default 'From' addresses for each customer. See **Manage Customer Details** in **Manage Customers** for more details. If required, you can choose a different email address from the drop-down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

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

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

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



The screenshot shows the 'Add CC' section of the Service Desk interface. The 'Collaborators:' label and the 'Recipients (6 of 6)' link are circled in red. A red arrow points from this area to the 'Ticket Collaborators' modal window. The modal window displays a list of collaborators with checkboxes and trashcan icons. At the bottom of the modal, there are buttons for 'Add New Collaborator', 'Cancel', 'Reset', and 'Save Changes'.

Collaborators: [Recipients \(6 of 6\)](#)

Select a canned response

<> ¶ Aa B I U A A ↺ ☰ ☷ ☹ ☺ ☻ ☼ ☽ ☾ ☿ ♀ ♂ ♁ ♃ ♄ ♅ ♆ ♇ ♈ ♉ ♊ ♋ ♌ ♍ ♎ ♏ ♐ ♑ ♒ ♓ ♁ ♃ ♄ ♅ ♆ ♇ ♈ ♉ ♊ ♋ ♌ ♍ ♎ ♏ ♐ ♑ ♒ ♓

Ticket Collaborators

- [Bumpsted Dagwood](#)
mmoxford@yahoo.com
- [Default User](#)
agent.monitor@DithersConstructionCompany
- [Default User](#) noreply@onecomodo.com
- [Default User](#) noreply@one.comodo.com
- [Ticket User](#) dyanorat481@gmail.com
- [Rich Cyclist](#) humbersafety@gmail.com

[Add New Collaborator](#)

[Cancel](#) [Reset](#) [Save Changes](#)

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

Ticket #788: Add a collaborator ✕

? Search existing users or add a new user.

Search by email, phone or name

Create New User: Please provide all the details

Email Address: *

Full Name: *

Phone Number: Ext:

Internal Notes:

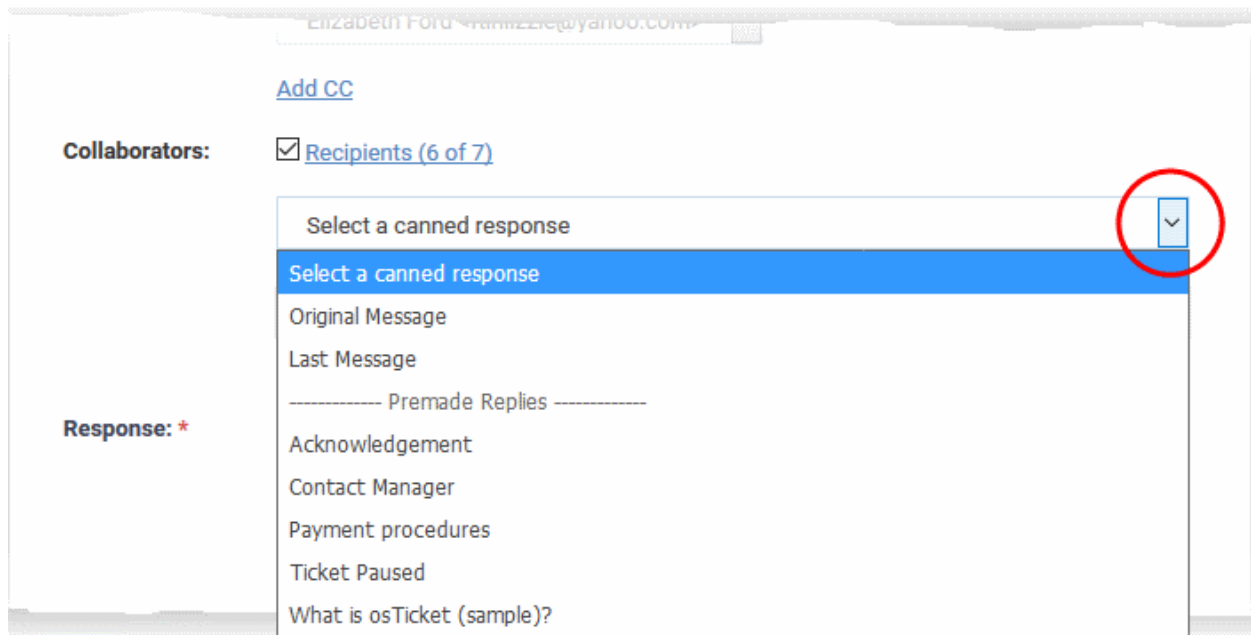
The 'Add a collaborator' dialog allows you to add a user in two ways:

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

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

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

- Repeat the process to add more collaborators
- Click 'Save Changes' in the 'Ticket Collaborators' dialog for your changes to take effect.
- **Response:** You can respond to the ticket by typing a reply in the text editor or by selecting an option from the drop-down.



Elizabeth Ford <Elizabeth.Ford@ytan100.com>

[Add CC](#)

Collaborators: [Recipients \(6 of 7\)](#)

Response: *

Select a canned response

Select a canned response

Original Message

Last Message

----- Premade Replies -----

Acknowledgement

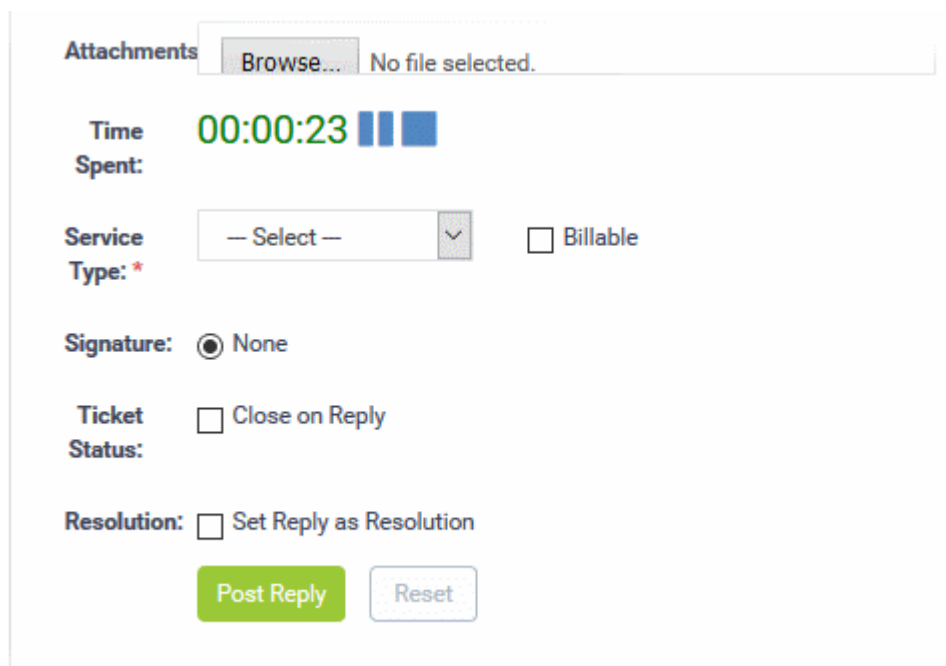
Contact Manager

Payment procedures

Ticket Paused

What is osTicket (sample)?

- **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



Attachments No file selected.

Time Spent: 00:00:23

Service Type: * Billable

Signature: None

Ticket Status: Close on Reply

Resolution: Set Reply as Resolution

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

ticket and the service contract associated with the customer company.

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

Post an internal note

- Click the 'Post Internal Note' tab

Post Reply
Post Internal Note
Dept. Transfer
Assign Ticket

Note Title:

Summary of the note (optional)

Internal Note:

<> | ¶ | Aa | B | I | U | A | A | ↺ | ☰ | ☷

☰ | ☷ | 🖼️ | 📺 | 📄 | 🔗 | 🗑️

Note details

Attachments: Browse... No file selected.

Ticket Status: — unchanged — ▼

Resolution: Set Reply as Resolution

Post Note
Reset

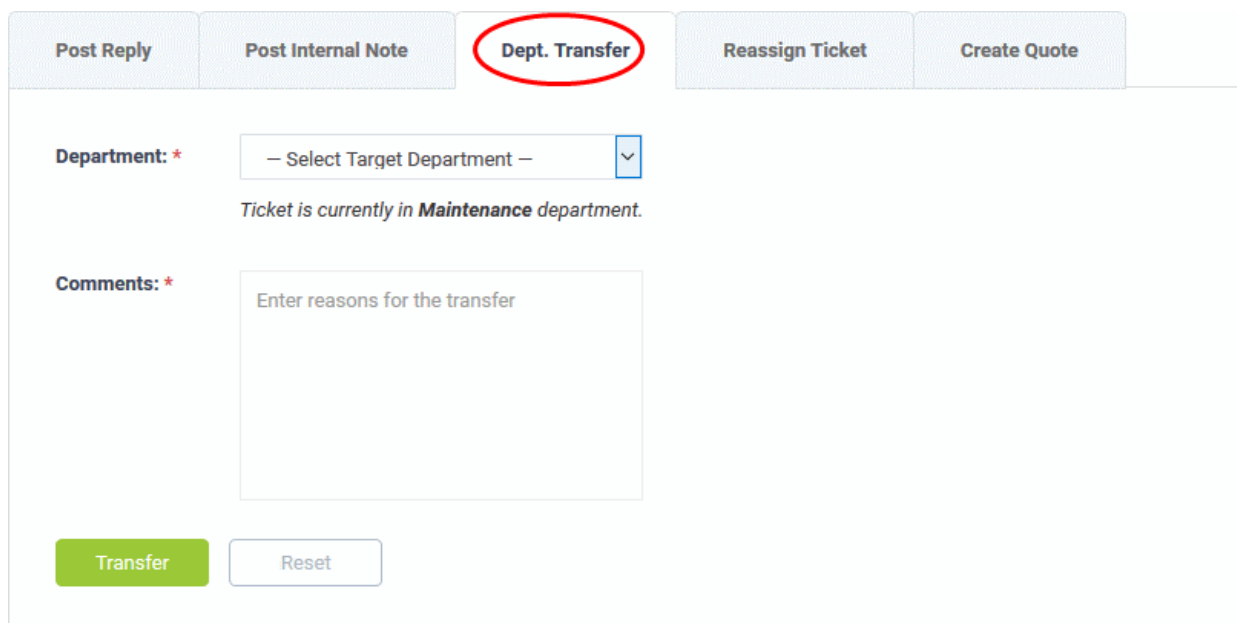
- **Note Title:** Enter a short summary for the note.
- **Note Details:** Enter any comments, notes, reminder or reason for pausing the ticket in the in the text editor
- **Attachments:** Click the 'Choose File' button to add attachments to the note. To remove the attachment, click on the file and select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

Change the department

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

Change the department for a ticket

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



The screenshot shows the 'Ticket Actions' pane with five tabs: 'Post Reply', 'Post Internal Note', 'Dept. Transfer' (circled in red), 'Reassign Ticket', and 'Create Quote'. Below the tabs, the 'Dept. Transfer' section is visible. It includes a 'Department: *' dropdown menu with the text '- Select Target Department -'. Below the dropdown, it says 'Ticket is currently in **Maintenance** department.' There is a 'Comments: *' text area with the placeholder text 'Enter reasons for the transfer'. At the bottom, there are 'Transfer' and 'Reset' buttons.

- **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.

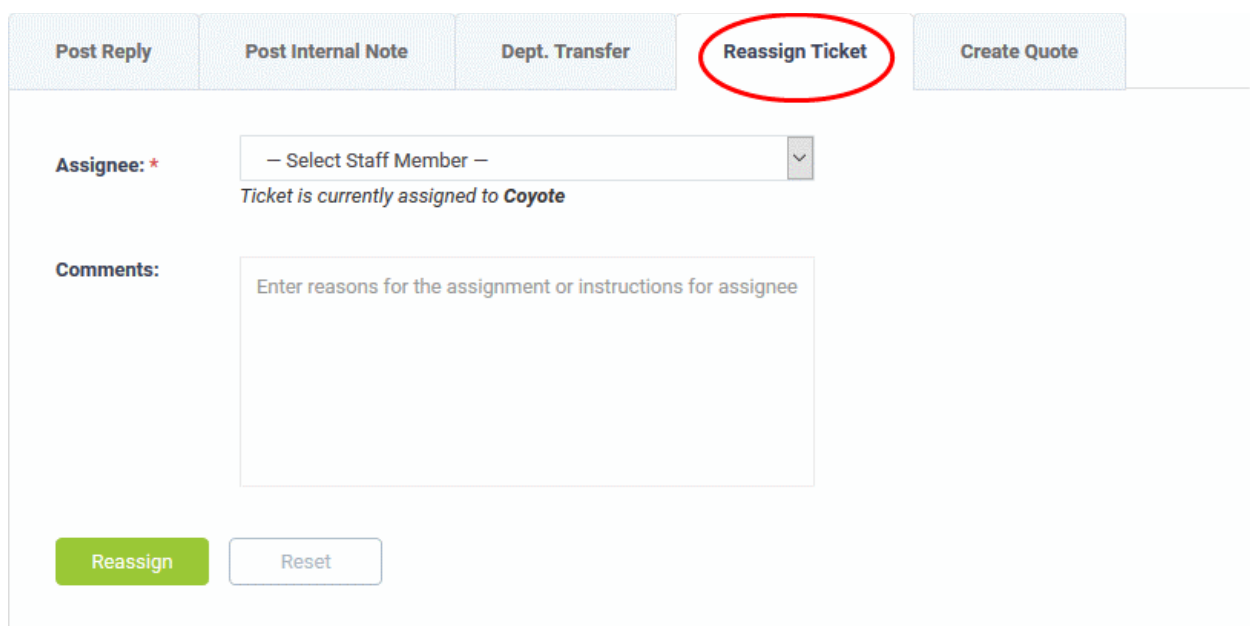
Assign/Reassign a ticket

- Tickets auto-generated by ITarian 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

Assign/reassign a ticket

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



The screenshot shows the 'Reassign Ticket' interface. At the top, there are five buttons: 'Post Reply', 'Post Internal Note', 'Dept. Transfer', 'Reassign Ticket' (circled in red), and 'Create Quote'. Below these buttons, there is a form with the following elements:

- Assignee:** A dropdown menu with the text '— Select Staff Member —' and a downward arrow. Below it, a message reads 'Ticket is currently assigned to Coyote'.
- Comments:** A text area with the placeholder text 'Enter reasons for the assignment or instructions for assignee'.
- Buttons:** A green 'Reassign' button and a light blue 'Reset' button.

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

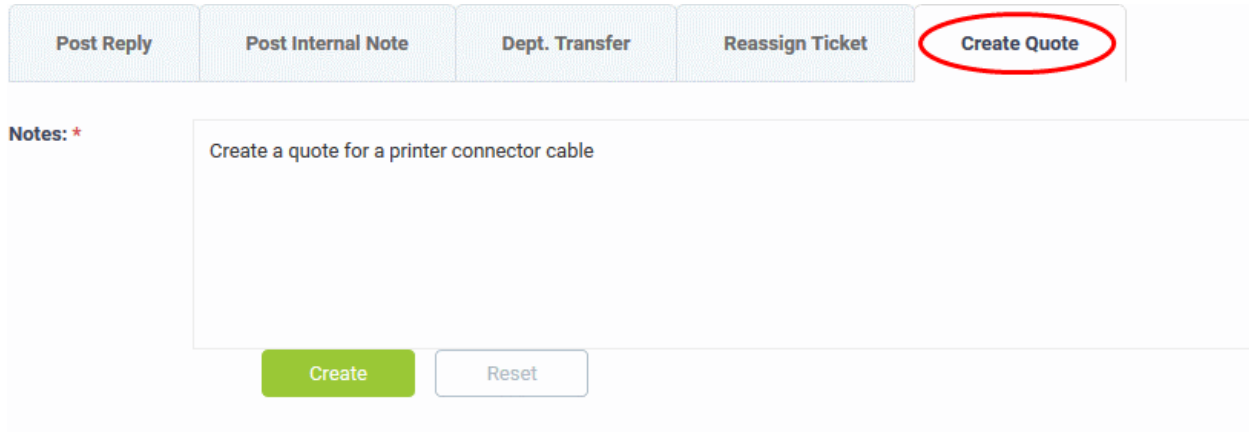
Create a quote for Products/Services

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

Initiate quotes from Service Desk tickets

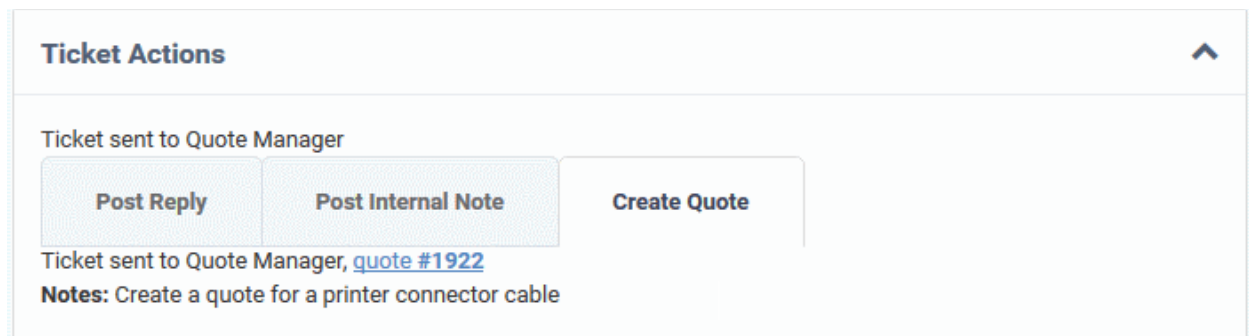
- Open the 'Staff' panel (see last link on the left)

- 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:

« HOME



ServiceDesk: System going sluggish

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



**Quote
Number**
1712

For

To

Created
Feb 15,
2018
9:49 AM

Expires
May 16,
2018
9:49 AM

From
ServiceDesk

History

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

To view the log of actions for a ticket

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

Subject: System going sluggish



Ticket Thread (18)

Sort by: Date

Internal Notes Staff Posts Client Posts

Herald

Fri, Jun 8 2018 12:21 pm

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

INTERNAL

Spokes and Wheels

Fri, Jun 8 2018 12:18 pm

To change the fan

Spokes and Wheels

Fri, Jun 8 2018 12:12 pm

TO: <hertriumph@gmail.com>

BSA Mach will take care

INTERNAL

Spokes and Wheels

Fri, Jun 8 2018 12:10 pm

Ticket Assigned to bsamach

Mach, please fix a fan

Spokes and Wheels

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

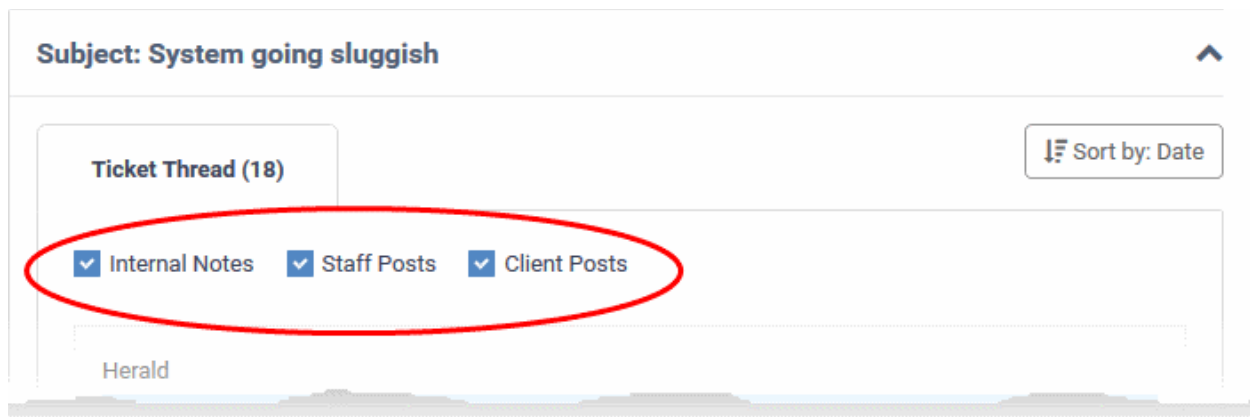
TO: <hertriumph@gmail.com>

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

We found heating issues. Trying to solve them

Show all threads

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




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

Material Details

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

To view the materials added to a ticket

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

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

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

Time Spent

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

To view and manage time spent on a ticket

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

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

Time Spent - Column Descriptions	
Column Header	Description
Start	Date and time the session began
End	Date and time the session finished
Time	Length of the session
Service Type	The kind of service provided during the session. Possible values are: <ul style="list-style-type: none"> • Onsite • Remote • Telephone
Staff	Name of the staff member who provided the support during the session.
Billable	Whether or not the customer will be charged for the session.
Manual	Whether or not the any time was added manually by staff. For example, to cover time spent during a site visit.
Action	Controls for editing and removing a session: - Edit the time spent

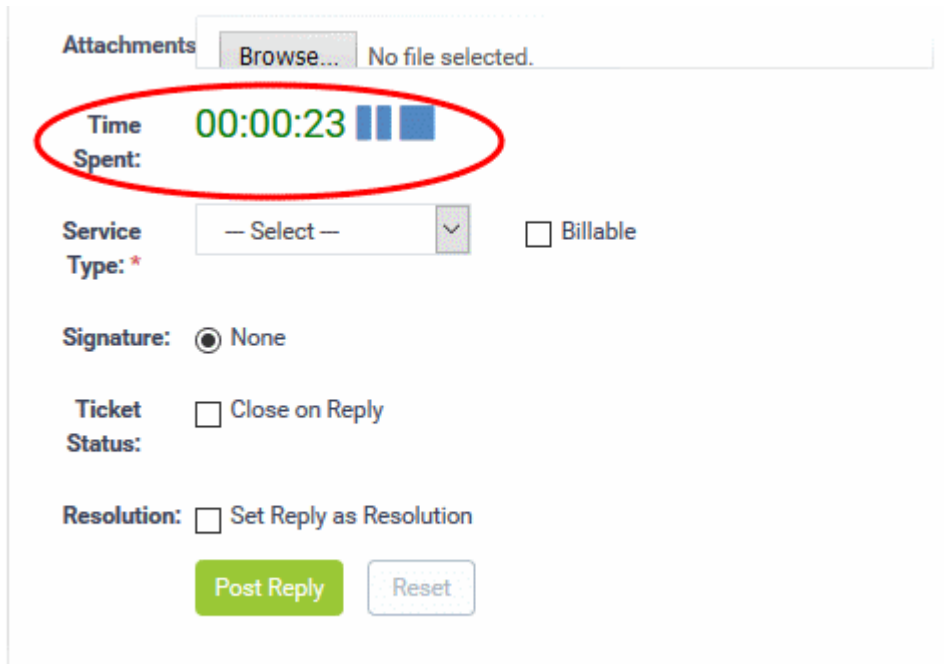


Time spent for each support session is added to the ticket in two ways:


- **'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:



Attachments No file selected.

Time Spent: 00:00:23 

Service Type: Billable


Signature: None

Ticket Status: Close on Reply

Resolution: Set Reply as Resolution

- 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.

Attachments No file selected.

Time Spent: 00:01:03 

Service Type: * Billable

Signature:
Onsite
Remote
Telephone

Ticket Status:

Resolution: Set Reply as Resolution

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

Manual Time Entry

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

To manually add time to a ticket

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

Time Spent (local time)

Start	End	Time	Service
2018-04-09 15:00:00	2018-04-09 15:30:00	00:30:00	Onsite
2018-04-10 09:00:00	2018-04-10 12:28:21	03:28:27	Remote

+ Add Work Time

Start	End	Time	Service
2018-04-09 15:00:00	2018-04-09 15:30:00	00:30:00	Onsite
2018-04-10 09:00:00	2018-04-10 12:28:21	03:28:27	Remote

Add Work Time

Staff:

Start Time:

End Time:

Duration:

Service Type:

Is Billable:

Comment

Cancel Save

The 'Add work time' dialog will appear:

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

Add Work Time ✕

Staff:

cyclist

Steam

transtar

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

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

transtar

Start Time:

2018-04-11 09:30:00

< **APRIL 2018** >

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

Time

Hour

Minute

Second

Now
Done

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

Duration:

00:20:00

Service Type:

— Select —

— Select —

Onsite

Remote

Telephone



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

The time spent will be added to the list.



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



Staff

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

To view and manage staff added to a ticket

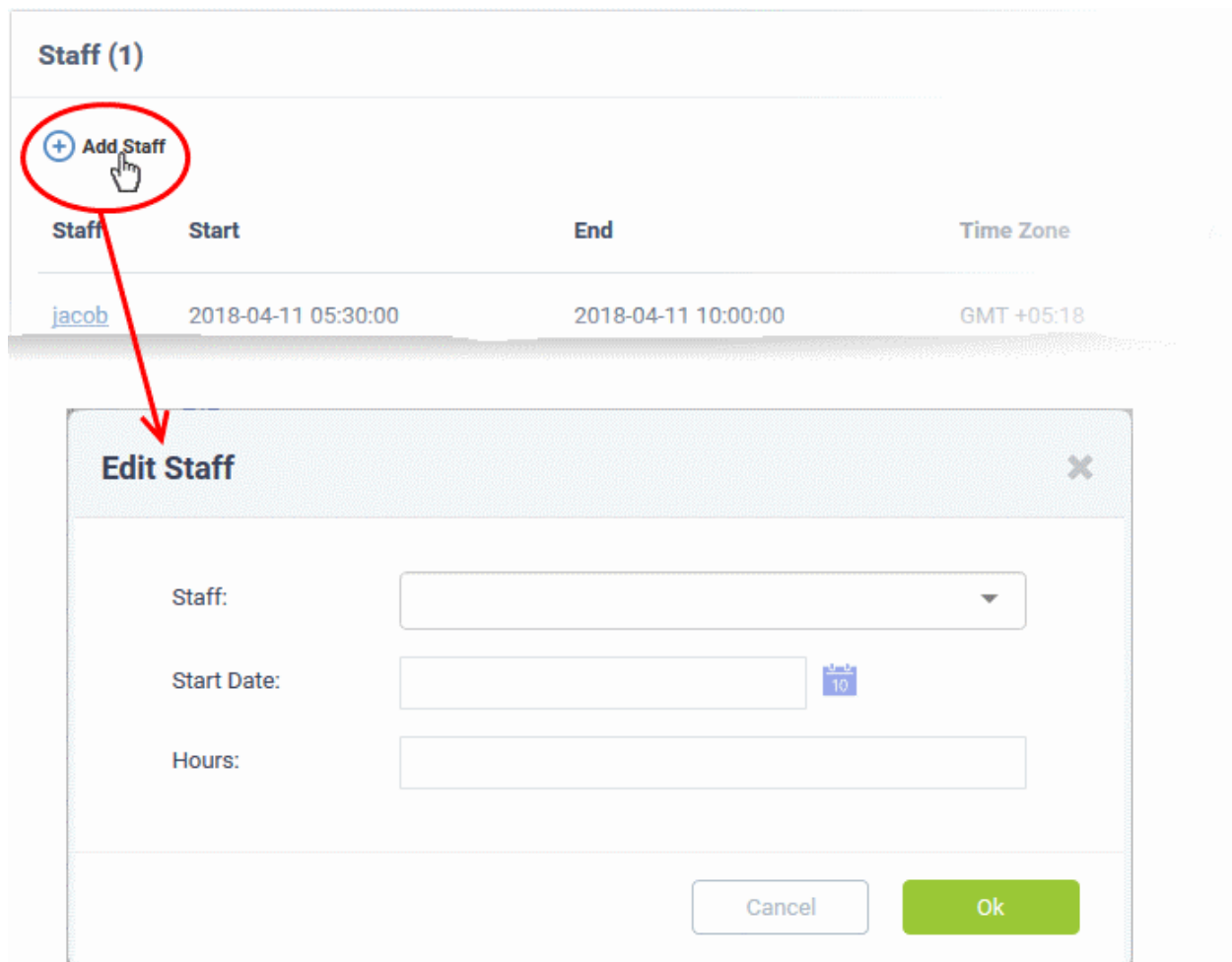
- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then a ticket type ('Open', 'Unassigned', 'Overdue', etc)
- Click the number of the ticket you want to open
- Scroll down and click the 'Staff' stripe.

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

Staff - Column Descriptions	
Column Header	Description
Staff	The name of the staff member added to the ticket. <ul style="list-style-type: none"> Click the name to edit the member's details
Start	The date and time at which the staff started working on the ticket
End	The date and time at which the staff finished working on the ticket
Time Zone	The time zone followed by the staff
Action	Controls for editing and removing a staff : <ul style="list-style-type: none">  - Edit the staff  - Remove the staff

To add a new staff to the ticket

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



The screenshot shows a table titled "Staff (1)" with columns: Staff, Start, End, and Time Zone. The first row contains the name "jacob", the start time "2018-04-11 05:30:00", the end time "2018-04-11 10:00:00", and the time zone "GMT +05:18". A red circle highlights the "+ Add Staff" button in the top left corner of the table. A red arrow points from this button to the "Edit Staff" dialog box that appears below. The dialog box has a title bar "Edit Staff" with a close button (X). It contains three input fields: "Staff:" with a drop-down menu, "Start Date:" with a date picker showing "10", and "Hours:" with a text input field. At the bottom of the dialog are "Cancel" and "Ok" buttons.

The 'Edit Staff' dialog will appear.

- Choose the staff member from the drop-down
- Start Date: Enter the date and time at which the staff member started working on the issue.

- Hours: Enter the approximate period of time the staff member worked on the issue. This is only a rough indicator which will not be added to the actual time spent on the ticket.
 - If required, you can manually add time to the ticket for the staff member **as described here**.
- Click 'OK'

The staff member will be added to the ticket.

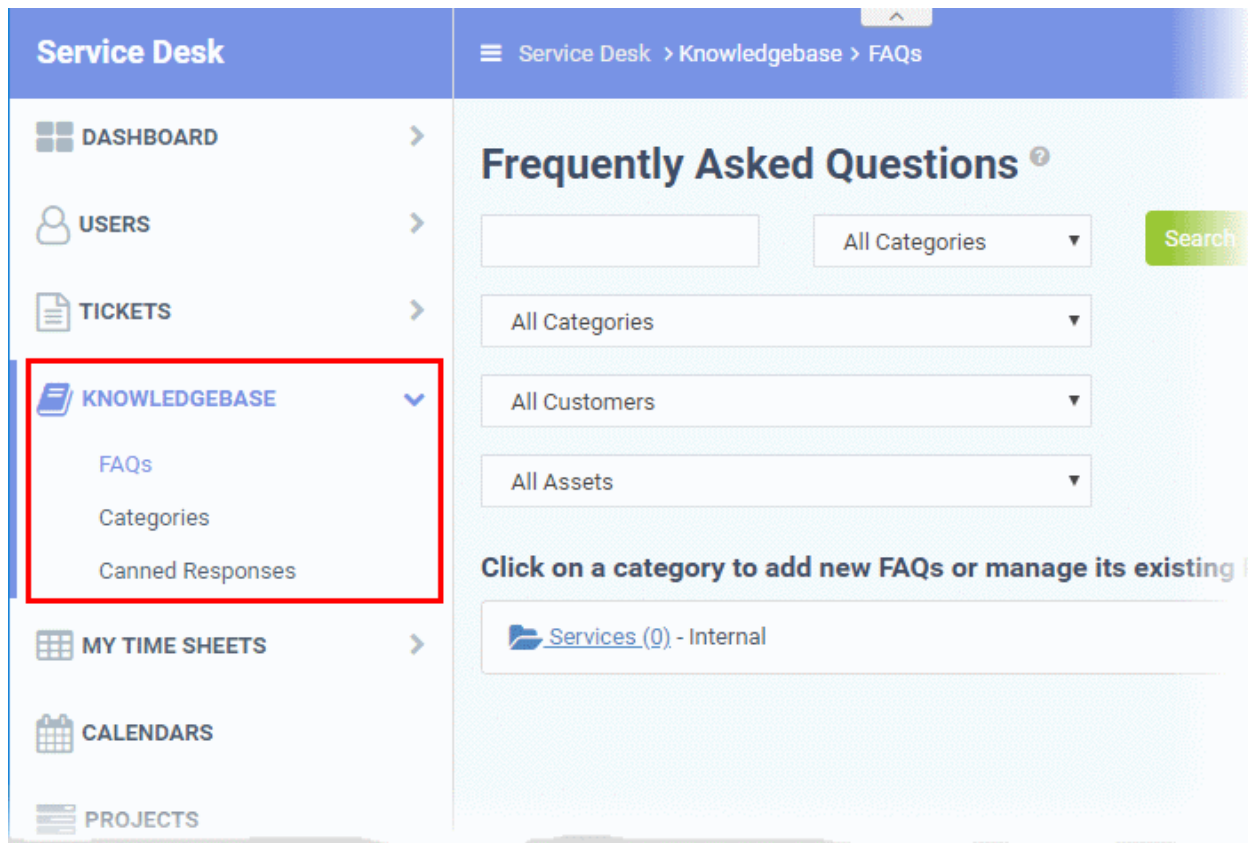
2.4 Manage Knowledgebase

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

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

To view, manage and add knowledgebase items:

- Click 'Knowledgebase' on the left



The screenshot displays the 'Service Desk' interface. On the left, a navigation menu includes 'DASHBOARD', 'USERS', 'TICKETS', 'KNOWLEDGEBASE' (highlighted with a red box), 'MY TIME SHEETS', 'CALENDARS', and 'PROJECTS'. The 'KNOWLEDGEBASE' section is expanded to show 'FAQs', 'Categories', and 'Canned Responses'. The main content area shows the 'Frequently Asked Questions' page with a search bar, a dropdown menu for 'All Categories', and a 'Search' button. Below the search bar, there are three more dropdown menus: 'All Categories', 'All Customers', and 'All Assets'. At the bottom, there is a section titled 'Click on a category to add new FAQs or manage its existing' with a list of services, including 'Services (0) - Internal'.

The following sections explain more about:

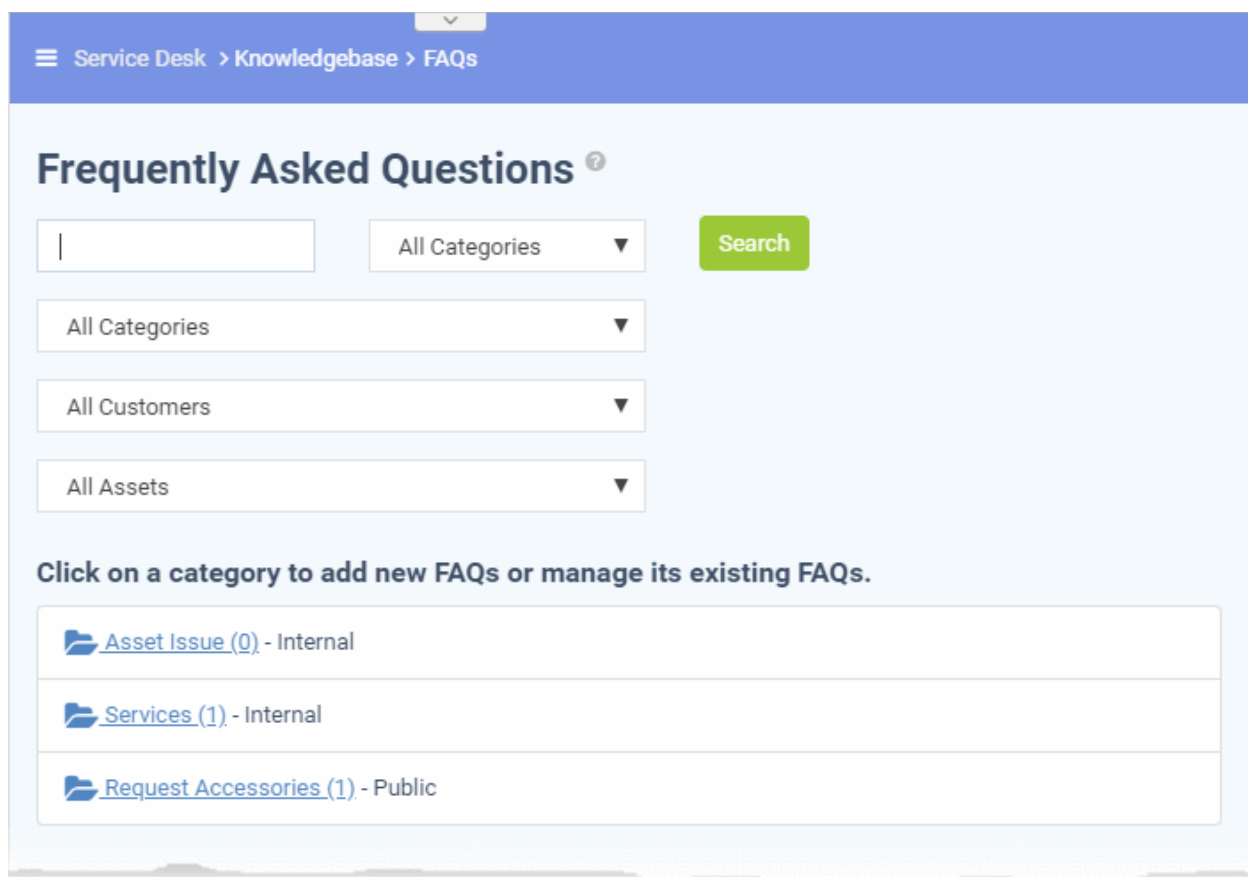
- **Manage FAQs**
- **Manage FAQ Categories**
- **Canned Responses**

2.4.1 FAQs

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

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

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



Service Desk > Knowledgebase > FAQs

Frequently Asked Questions

All Categories
Search

All Categories
All Customers
All Assets

Click on a category to add new FAQs or manage its existing FAQs.

- [Asset Issue \(0\) - Internal](#)
- [Services \(1\) - Internal](#)
- [Request Accessories \(1\) - Public](#)

Filter Options

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

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

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

- **View an FAQ**
- **Add an FAQ to a category**
- **Edit an FAQ**
- **Publish / Unpublish an FAQ**
- **Remove an FAQ**

View an FAQ

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

All Assets

Click on a category to add new FAQs or manage its existing FAQs.

- Asset Issue (0) - Internal
- Services (3) - Internal**
- Request Accessories (1) - Public

Service Desk > Knowledgebase > FAQs

Frequently Asked Questions

Category Name : Services - Internal

Category Description : System is slow

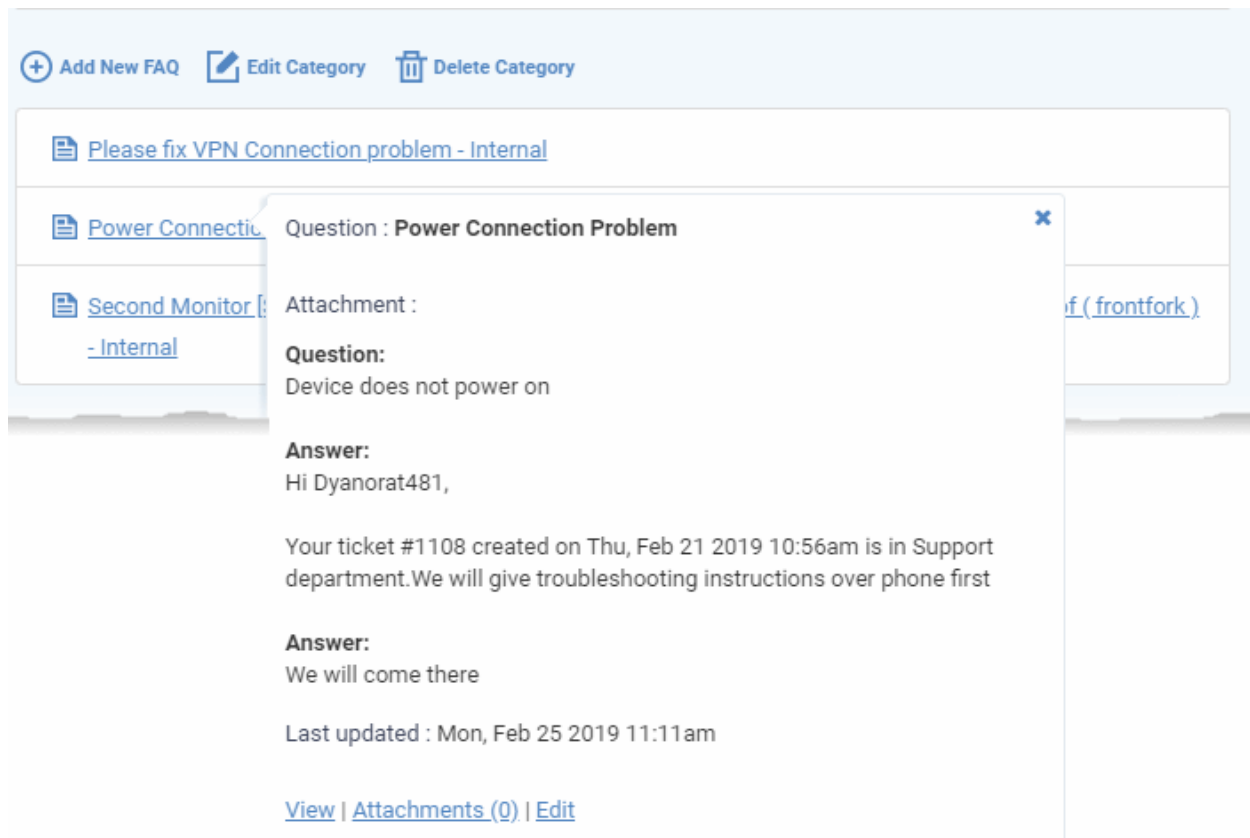
Last updated 09/17/2018 4:35 pm

+ Add New FAQ Edit Category Delete Category

- Please fix VPN Connection problem - Internal
- Power Connection Problem - Internal
- Second Monitor [Suspicious Files Folder for John] MONITORING Triggered on TECHMONSTER of (frontfork) - Internal

All FAQs in the category are shown.

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



The screenshot shows the ITARIAN Service Desk interface. At the top, there are three buttons: '+ Add New FAQ', 'Edit Category', and 'Delete Category'. Below these is a list of FAQs. The first FAQ is 'Please fix VPN Connection problem - Internal'. The second is 'Power Connection Problem' with a question: 'Power Connection Problem'. The third is 'Second Monitor [- Internal' with an attachment: 'f (frontfork)'. A modal window is open over the 'Power Connection Problem' FAQ, showing the following details:

Question : Power Connection Problem

Attachment :

Question:
Device does not power on

Answer:
Hi Dyanorat481,

Your ticket #1108 created on Thu, Feb 21 2019 10:56am is in Support department. We will give troubleshooting instructions over phone first

Answer:
We will come there

Last updated : Mon, Feb 25 2019 11:11am

[View](#) | [Attachments \(0\)](#) | [Edit](#)

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

Add an FAQ to a category

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

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

- Click 'Add New FAQ'

The 'Add New FAQ' screen will be displayed.

Comodo One > Service Desk

FAQ

Add New FAQ

Question

Category Listing: FAQ category the question belongs to.

Check cat (Public) ▼

Listing Type: Public (publish) Internal (private)

Answer

Attachments (optional) Select files to upload.

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:

FAQ Information

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

Answer

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

Attachments

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

Ticket Category

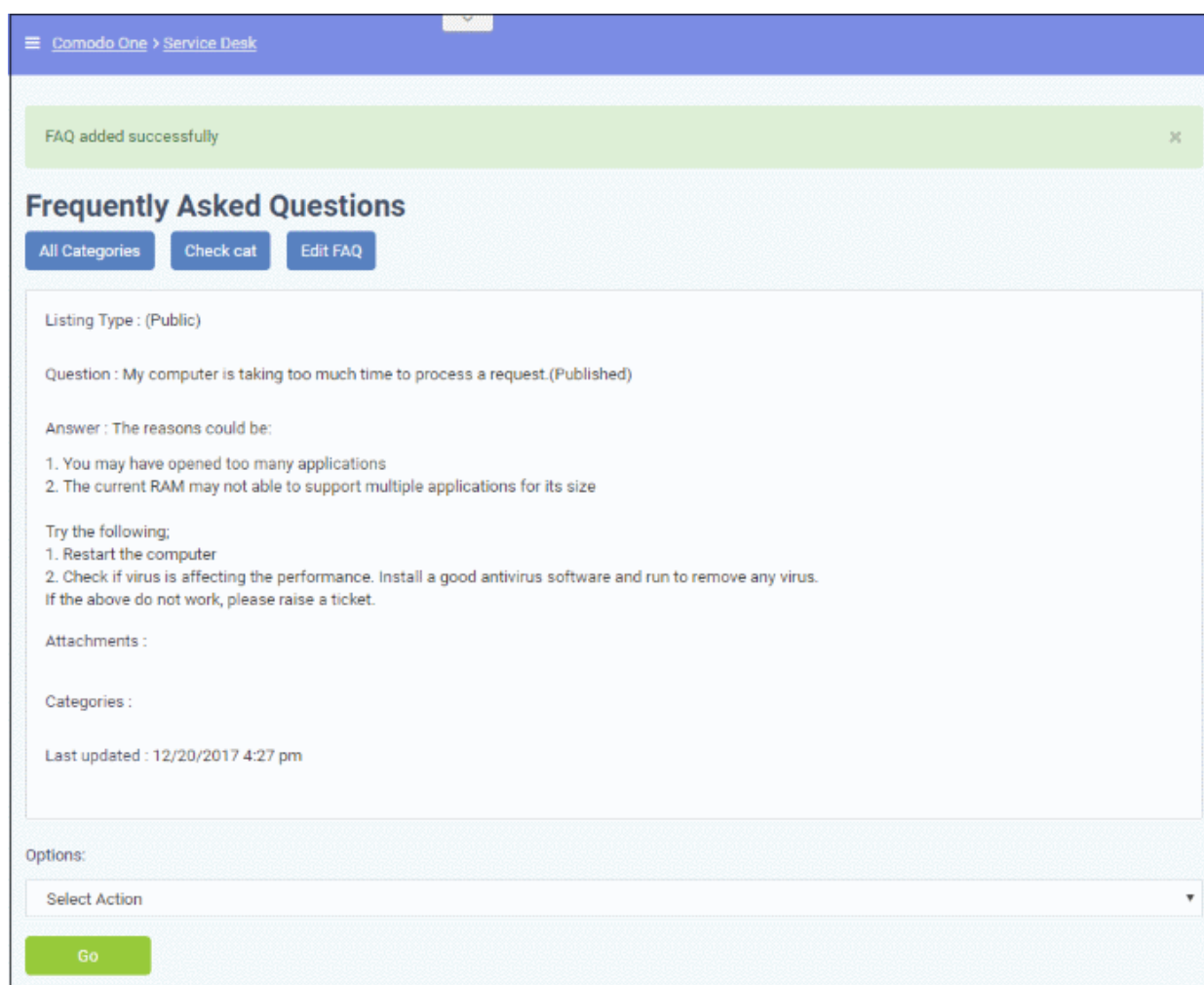
- Select ticket categories that should be listed as 'related' in the FAQ. This will also help users to locate the FAQ if they search by ticket category in the web portal.

Internal Notes

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

Click the 'Add FAQ' button at the bottom.

The 'FAQ successfully added' screen will be displayed.



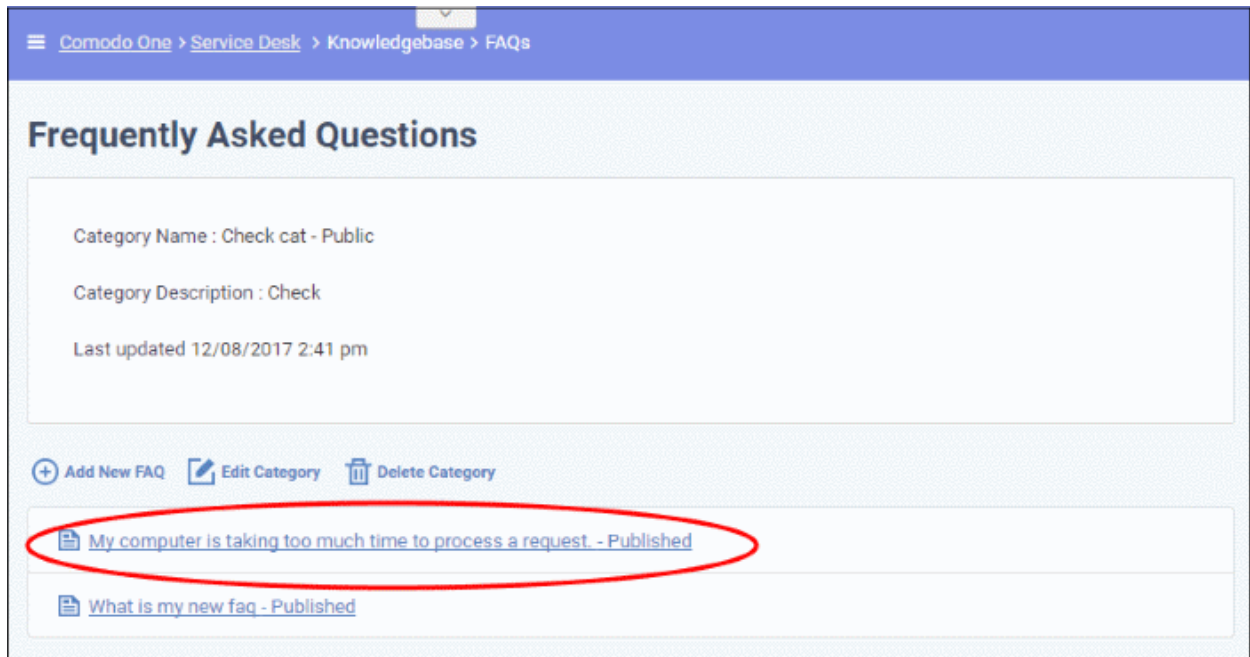
From the screen you can also edit, publish, unpublish or delete the FAQ using the 'Options' drop-down.

Edit an FAQ

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

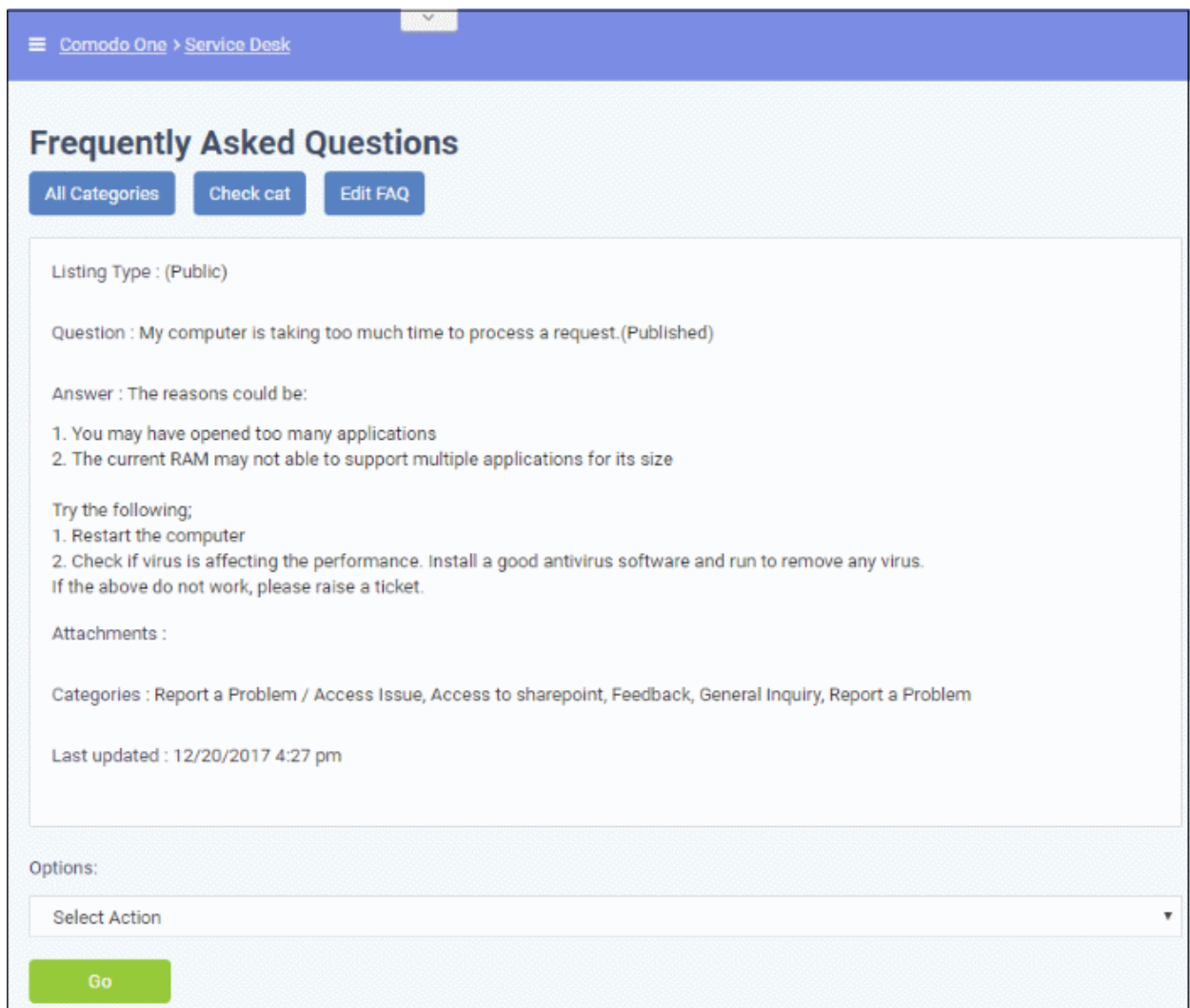
- Click 'Knowledgebase' on the left then 'FAQs'
- Click the category in which the 'FAQ' that you want to edit is placed.

The list of FAQs in the category will be displayed.

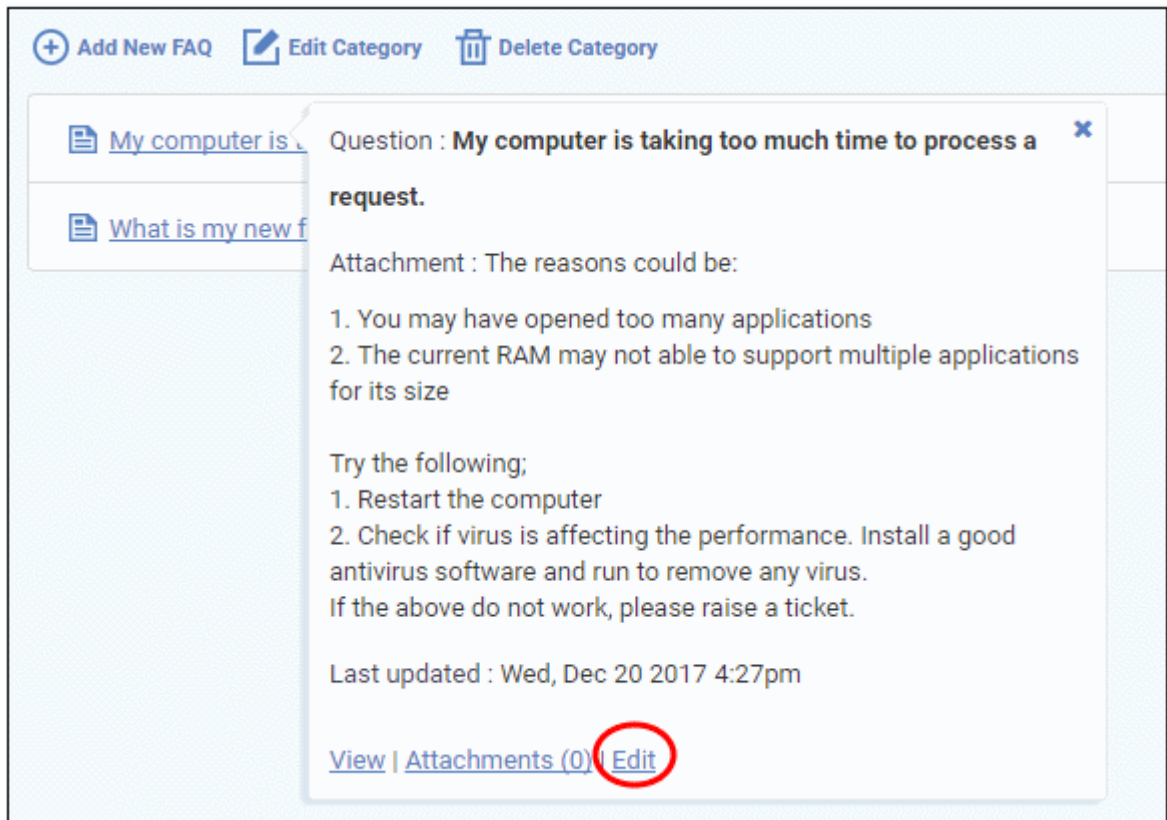


- Click on the FAQ that you want to edit.

The 'FAQ' details screen will be displayed.



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



The screenshot displays the ITarian Service Desk interface. At the top, there are three buttons: '+ Add New FAQ', 'Edit Category', and 'Delete Category'. Below these, a list of FAQ entries is shown. The first entry is titled 'My computer is taking too much time to process a request.' and is selected. The content of this FAQ is displayed in a modal window. The modal contains the following text:

Question : **My computer is taking too much time to process a request.**

Attachment : The reasons could be:

1. You may have opened too many applications
2. The current RAM may not able to support multiple applications for its size

Try the following;

1. Restart the computer
2. Check if virus is affecting the performance. Install a good antivirus software and run to remove any virus.

If the above do not work, please raise a ticket.

Last updated : Wed, Dec 20 2017 4:27pm

At the bottom of the modal, there are three links: 'View', 'Attachments (0)', and 'Edit'. The 'Edit' link is circled in red.

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 be able to support multiple applications for its size

Try the following:

1. Restart the computer
2. Check if virus is affecting the performance. Install a good antivirus software and run to remove any virus.

If the above do not work, please raise a ticket.

Attachments (optional) Select files to upload.

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:

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

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

Publish / Unpublish an FAQ

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

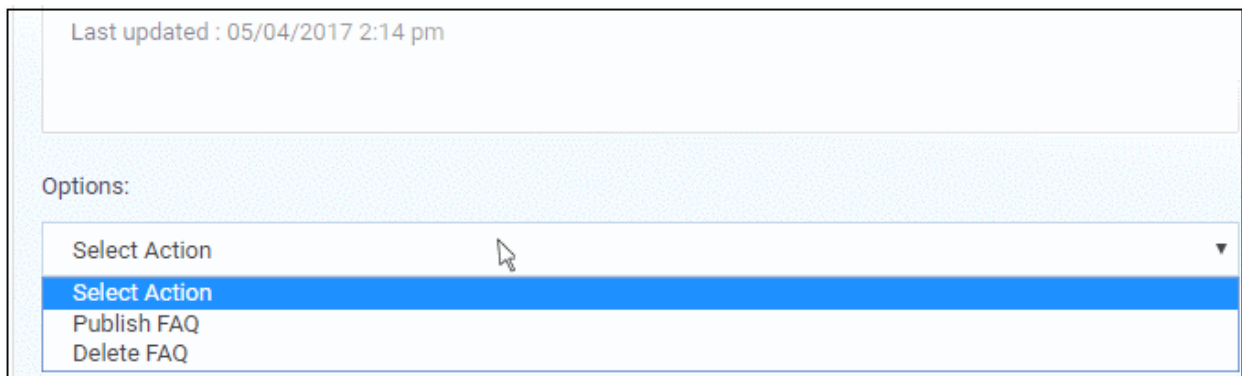
- Click the name of the category from the FAQ interface

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.



Last updated : 05/04/2017 2:14 pm

Options:

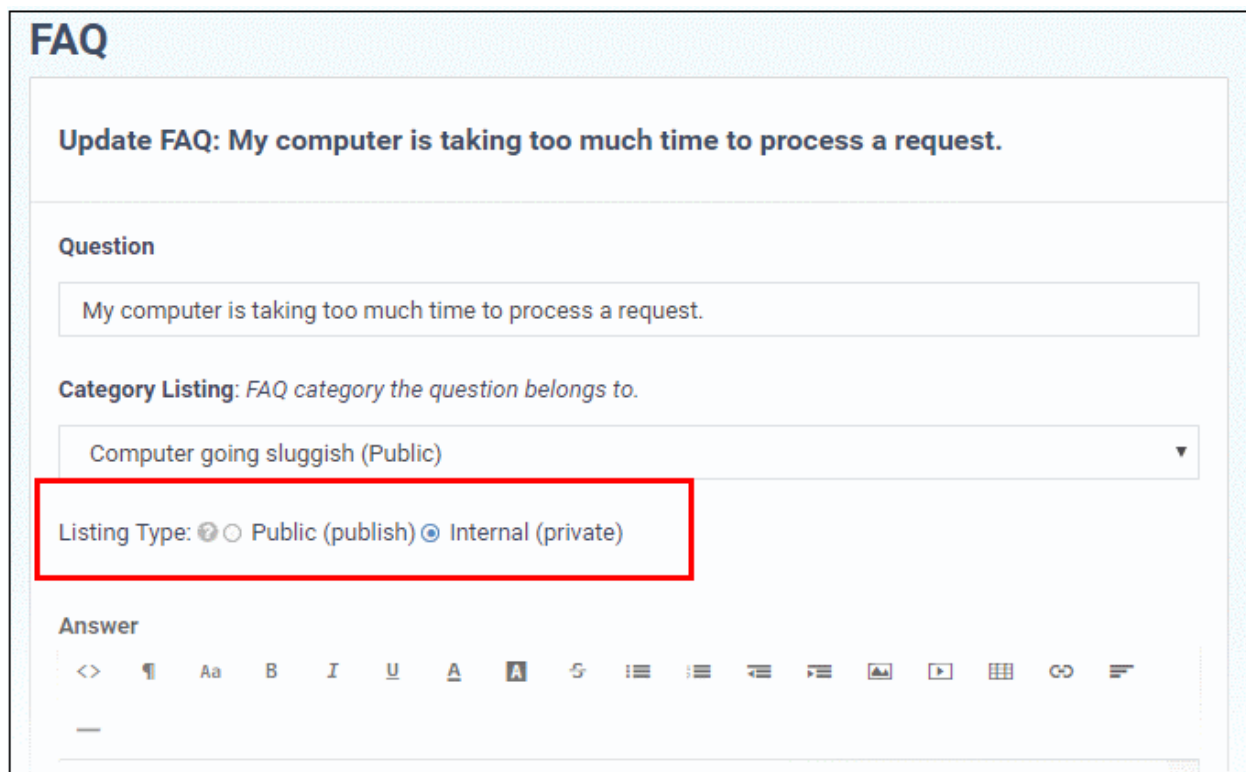
Select Action

Select Action

Publish FAQ

Delete FAQ

Alternatively, you can open the 'Update FAQ' for the question by selecting 'Edit FAQ' from the 'Options' drop-down and change the 'published' status of the FAQ. See the [explanation of editing a FAQ](#) for more details.



FAQ

Update FAQ: My computer is taking too much time to process a request.

Question

My computer is taking too much time to process a request.

Category Listing: FAQ category the question belongs to.

Computer going sluggish (Public)

Listing Type: Public (publish) Internal (private)

Answer

<> ¶ Aa B I U A A ↺ ⋮ ⋮ ⋮ ⋮ 🖼️ 📺 📄 🔄 🗑️

Removing an FAQ

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

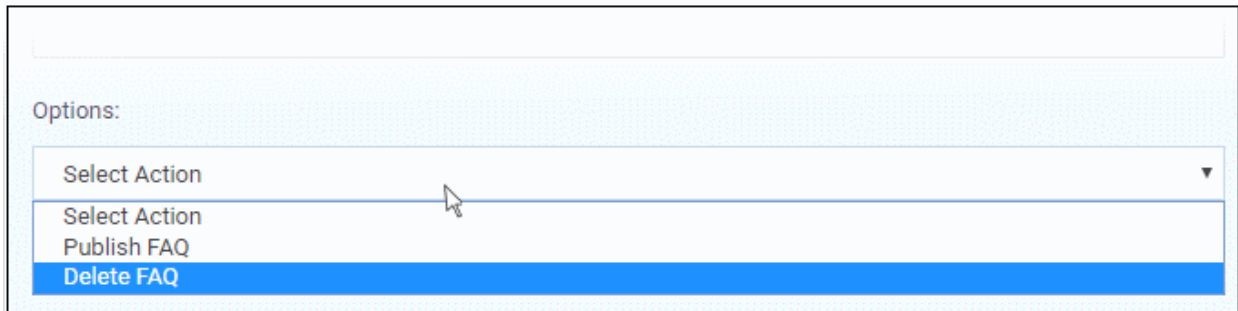
- Click the name of the category from the FAQ interface

The list of FAQs in the category will be displayed.

- Click the FAQ that you want to delete

The 'FAQ details' screen will be displayed.

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



The 'FAQ' will be deleted from the category.

2.4.2 Manage FAQ Categories

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



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

Column Headers

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

From the interface, a staff member can:

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

To add a new category

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

FAQ Categories ?

Show 25 record ▼

<input type="checkbox"/>	NAME ↕	TYPE ↕	FAQS ↕	LAST UPDATED ↕
<input type="checkbox"/>	Asset Issue	Internal	0	09/17/2018 4:33 pm

FAQ Category

Add New Category

Category information ?

Category Type : Public (publish) Private (internal)

Visible for role : All Only Selected

Role

Visible for Customer : All Only Selected

Customer

Category Description: Summary of the category.

Internal Notes

The 'Add New Category' dialog appears.

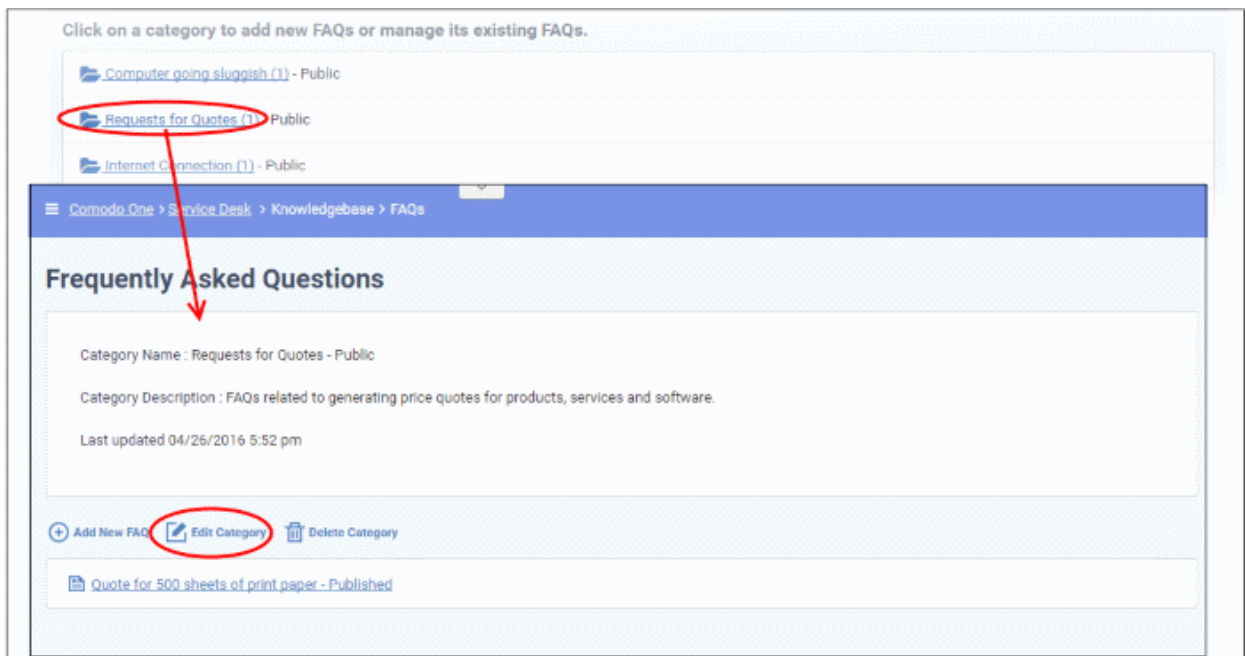
- **Category Type:** Select whether the FAQ category should be marked as 'Public' or 'Private'. By default it will be selected as 'Private'.
- **Visible for Role:** Specify which staff roles can view the FAQs in the category. Select 'All' to let all staff view them. Choose 'Only Selected' to restrict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

visibility to users of certain companies.

- **Category Name:** Enter a short, descriptive name for the FAQ category.
 - **Category Description:** Enter a brief description for the category.
 - **Internal Notes:** Add notes that can be viewed by staff and admins.
- Click the 'Reset' button to clear the fields.
 - Click the 'Add' button to save the category.

To edit a category

- Open 'Knowledgebase' > 'Categories'
 - Click on a category name to edit the category
- OR
- Open 'Knowledgebase' > 'FAQs'
 - Click on a category name then click 'Edit Category'



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

Comodio Org > Service Desk > Knowledgebase > Categories

FAQ Categories

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

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

FAQ Category

Update Category: Requests for Quotes

Category information

Category Type : Public (publish) Private (Internal)

Visible for role : All Only Selected

Role

Visible for Organization : All Only Selected

Organization

Category Name: Short descriptive name.
Requests for Quotes

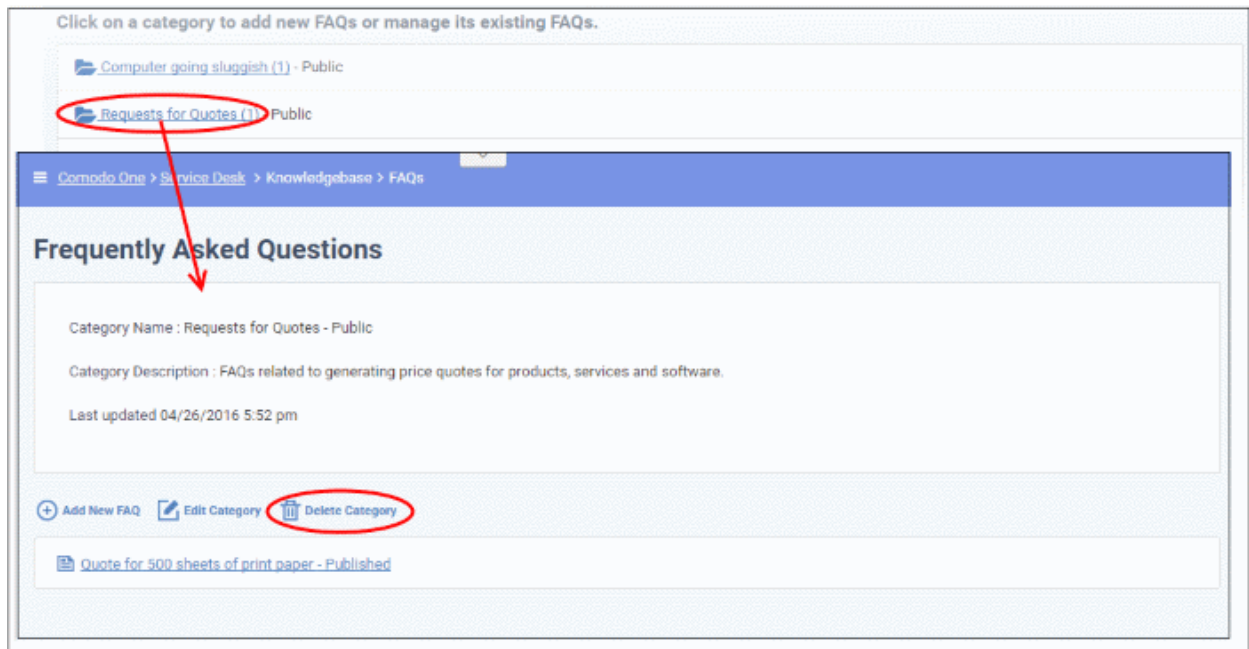
Category Description: Summary of the category.
FAQs related to generating price quotes for products, services and software.

Internal Notes

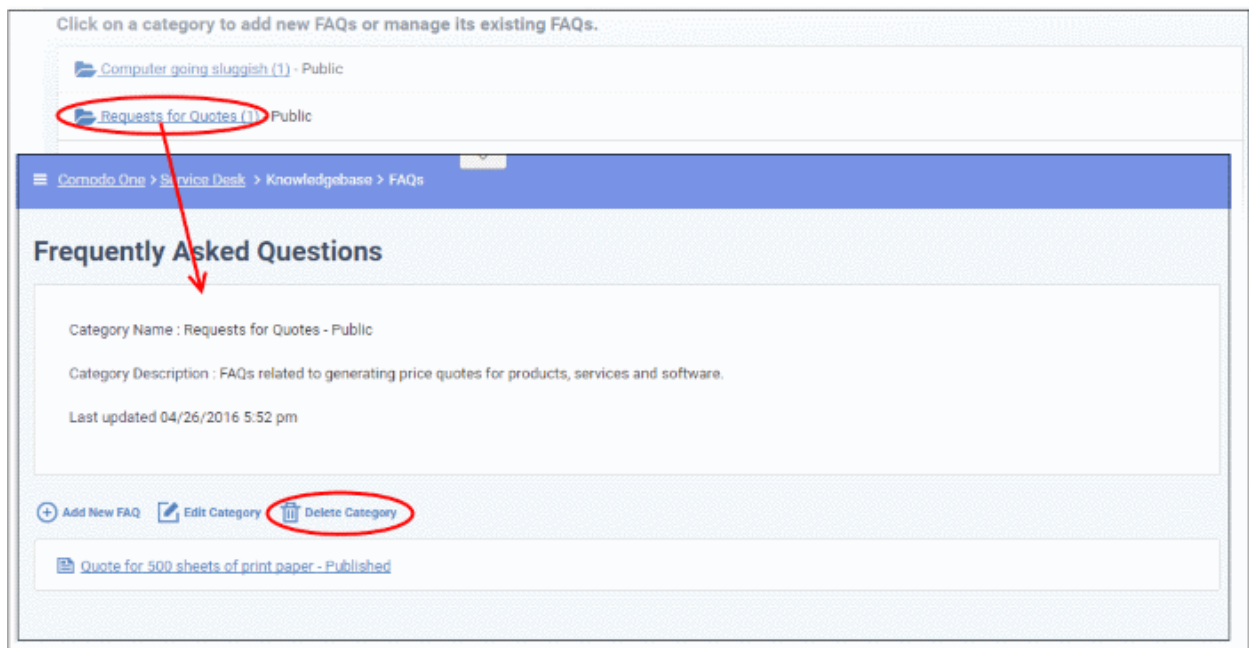
- Edit the category as required and click the 'Save Changes' button.

To delete a category

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



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



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

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

To mark a category as public or private

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



FAQ Categories

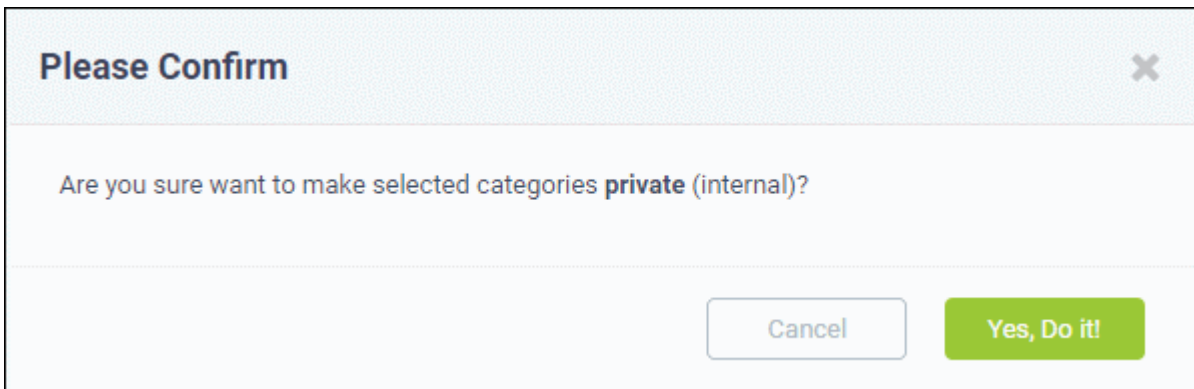
[Add New Category](#)
[Make Public](#)
[Make Internal](#)
[Delete](#)

Show 10 records Search...

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

« Prev 1 Next »

- To publish a category, select it and click the 'Make Public' button.
- To make a category as private, select it and click the 'Make Internal' button.
- In the confirmation screen, click the 'Yes, Do it!' button.



Please Confirm ✕

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

2.4.3 Canned Responses

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

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

Comodo One > Service Desk > Knowledgebase > Canned Responses

Canned Responses

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

Show 10 records Search...

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

« Prev 1 Next»

Sorting and searching options

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

Column Headers

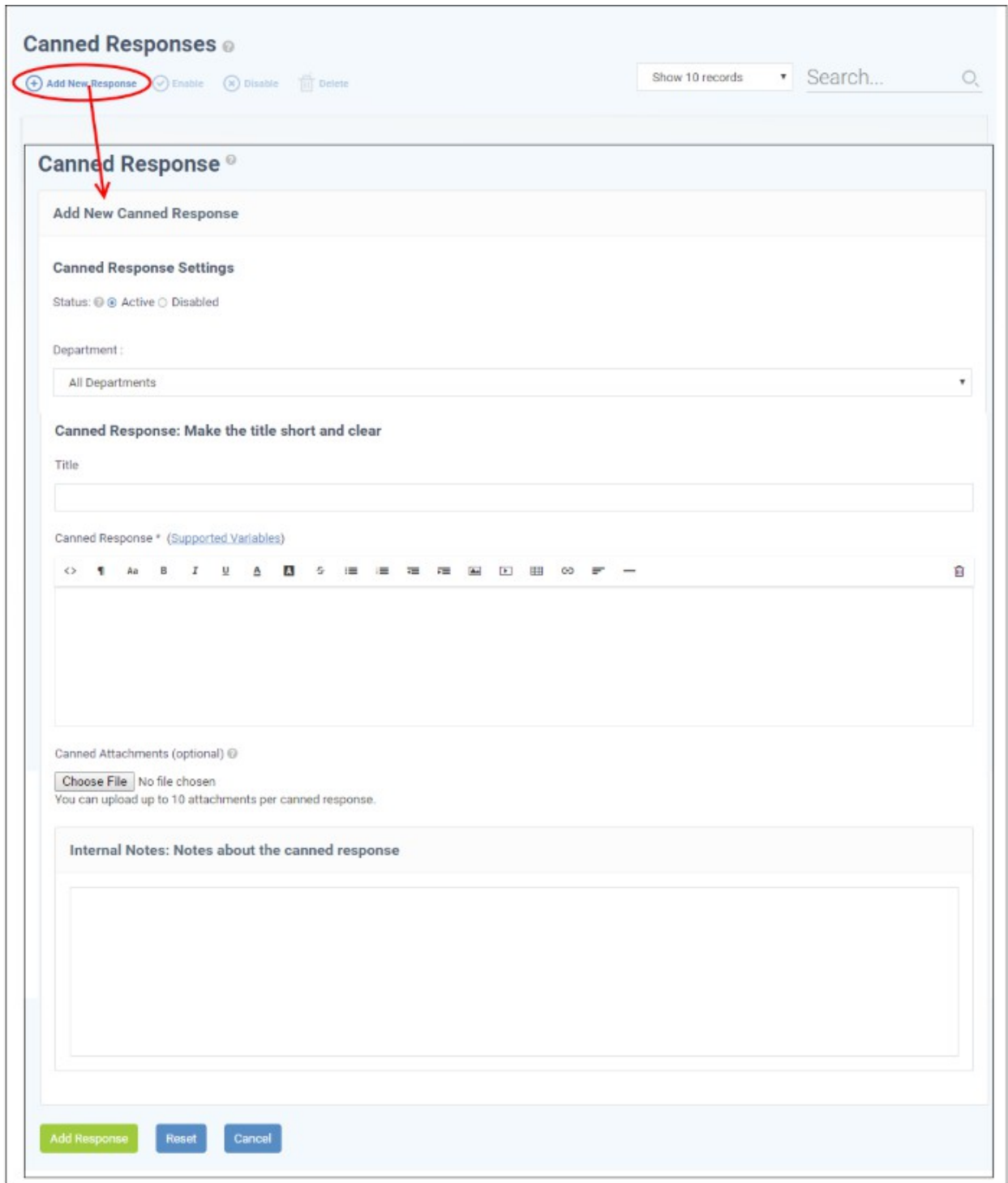
- **Title:** The name of the 'Canned Response'. Clicking a name will open its **update screen**.
- **Status:** Indicates whether the 'Canned Response' is active or disabled. Only 'Active' responses will be available for selection from 'Ticket Details' interface while managing a ticket. See **Ticket Details**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

From the interface, a staff member can:

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

To add a new 'Canned Response'

- Click 'Add New Response' at the top



Canned Responses

Show 10 records Search...

Canned Response

Add New Canned Response

Canned Response Settings

Status: Active Disabled

Department:

All Departments

Canned Response: Make the title short and clear

Title

Canned Response * (Supported Variables)

No file chosen
 You can upload up to 10 attachments per canned response.

Internal Notes: Notes about the canned response

The 'Add New Canned Response' screen will appear.

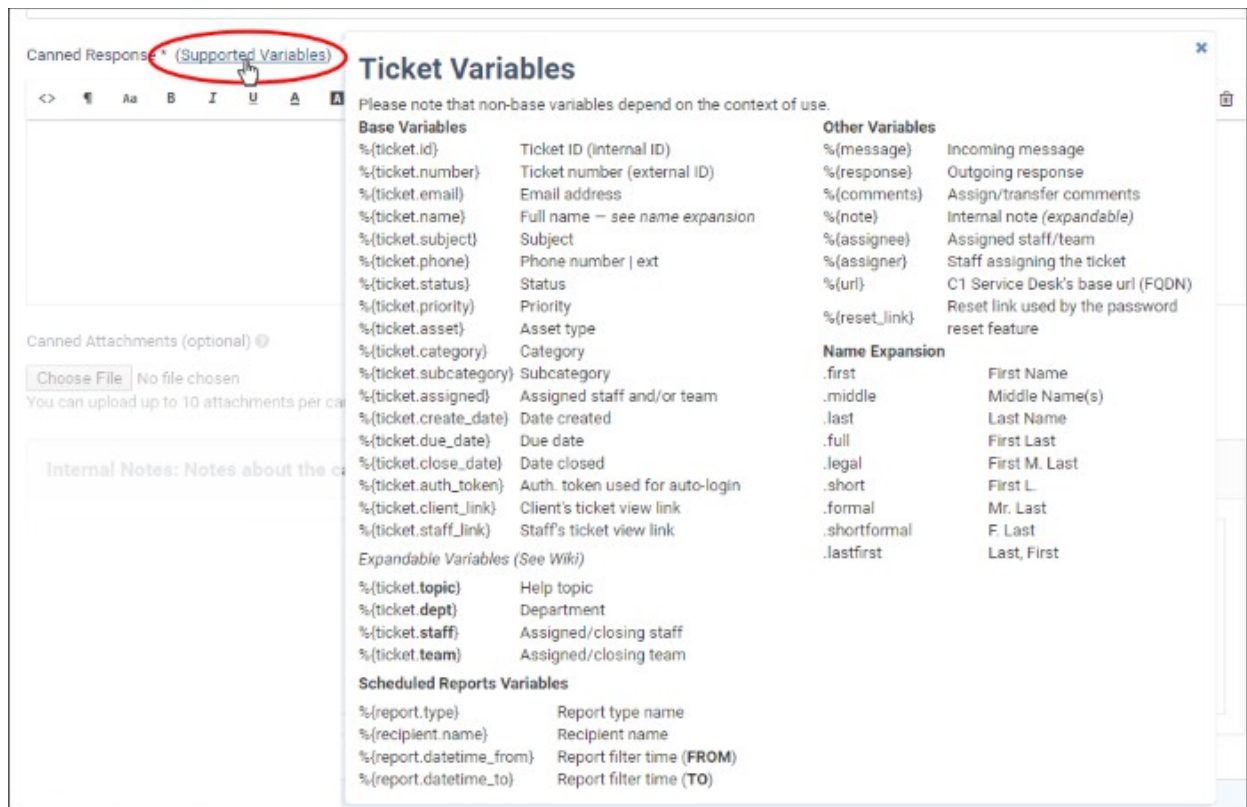
Canned Response Settings

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

for all ticket responses.

Canned Response

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



The screenshot shows a 'Supported Variables' dialog box. The title bar reads 'Canned Response >> (Supported Variables)'. The main content area is titled 'Ticket Variables' and contains a list of variables. A red circle highlights the '(Supported Variables)' link in the top left corner. The variables are organized into several sections:

- Base Variables:** A list of variables like `%(ticket.id)`, `%(ticket.number)`, `%(ticket.email)`, etc., with their corresponding descriptions.
- Other Variables:** A list of variables like `%(message)`, `%(response)`, `%(comments)`, etc.
- Name Expansion:** A list of variables like `.first`, `.middle`, `.last`, etc.
- Expandable Variables (See Wiki):** A list of variables like `%(ticket.topic)`, `%(ticket.dept)`, etc.
- Scheduled Reports Variables:** A list of variables like `%(report.type)`, `%(recipient.name)`, etc.

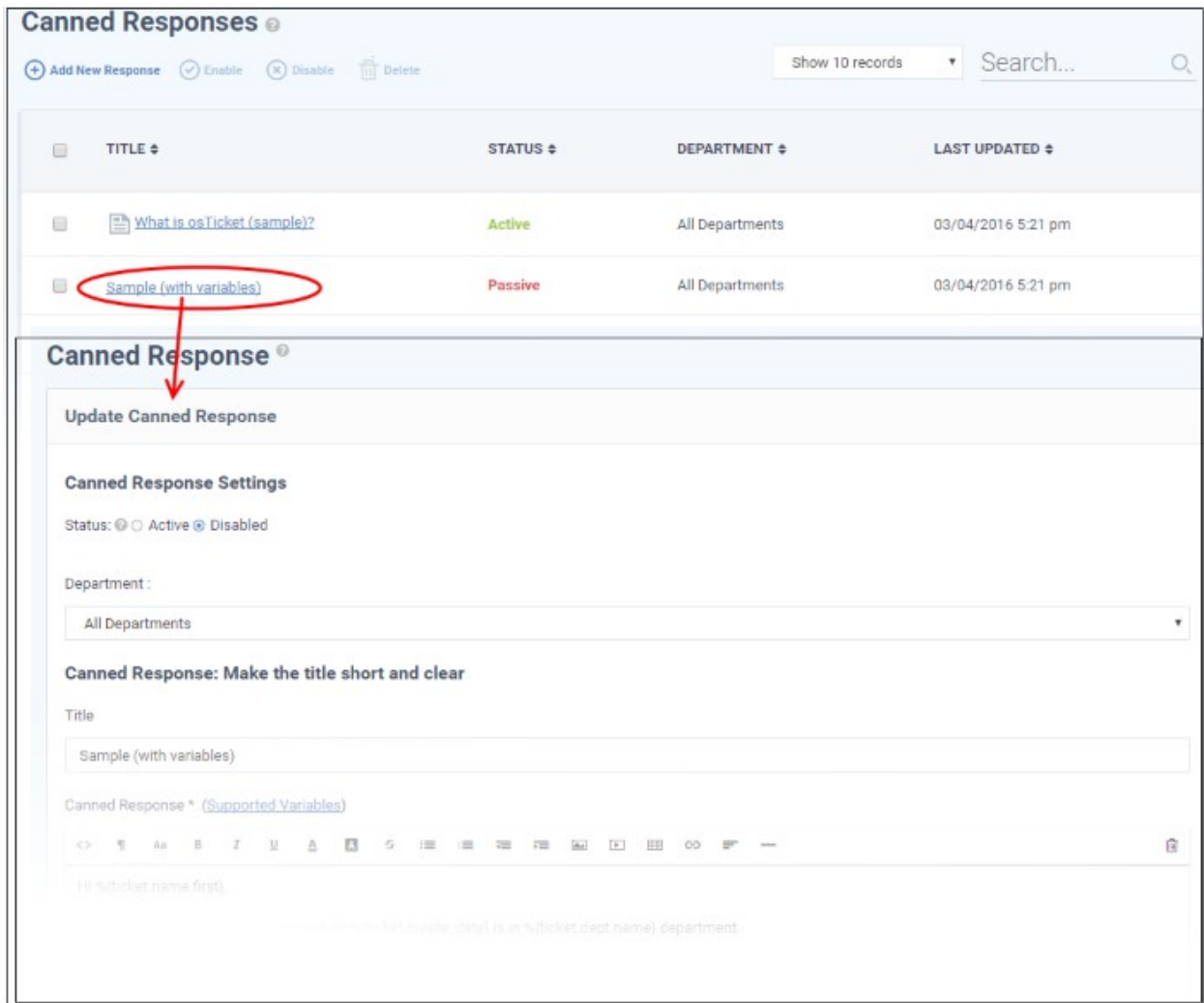
- To clear the text, click the trash can icon at the top right.
- **Canned Attachments:** To add any attachments to the reply, click the 'Choose File' button, select the required file and click the 'Open' button. To remove the attachment, click on the file and select 'OK' from the confirmation screen.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

Internal Note

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

To edit a 'Canned Response'

- Click the canned response to be edited



Canned Responses

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

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

Canned Response

Update Canned Response

Canned Response Settings

Status: Active Disabled

Department: All Departments

Canned Response: Make the title short and clear

Title: Sample (with variables)

Canned Response * (Supported Variables)

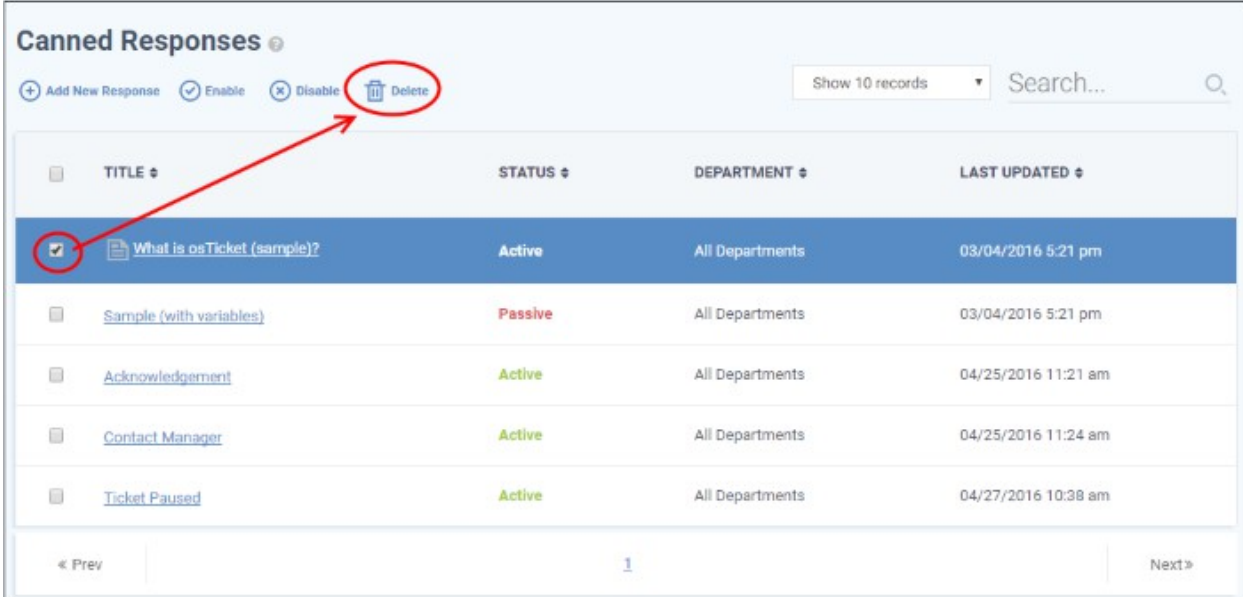
Hi %ticket.name.first%
 %ticket.name.last% %ticket.name.initial% is in %ticket.dept.name% department.

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

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

To delete a 'Canned Response'

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



Canned Responses

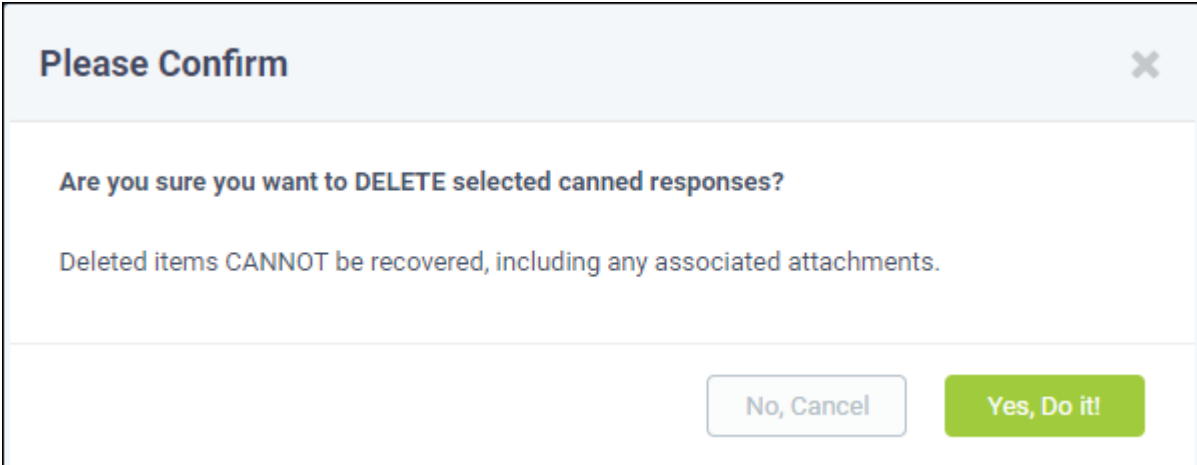
+ Add New Response ✓ Enable ✗ Disable 🗑 Delete

Show 10 records Search...

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

< Prev 1 Next >

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



Please Confirm ✕

Are you sure you want to DELETE selected canned responses?

Deleted items CANNOT be recovered, including any associated attachments.

No, Cancel Yes, Do it!

Enable or disable a 'Canned Response'

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

Canned Responses

Show 10 records Search...

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

« Prev 1 Next »

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

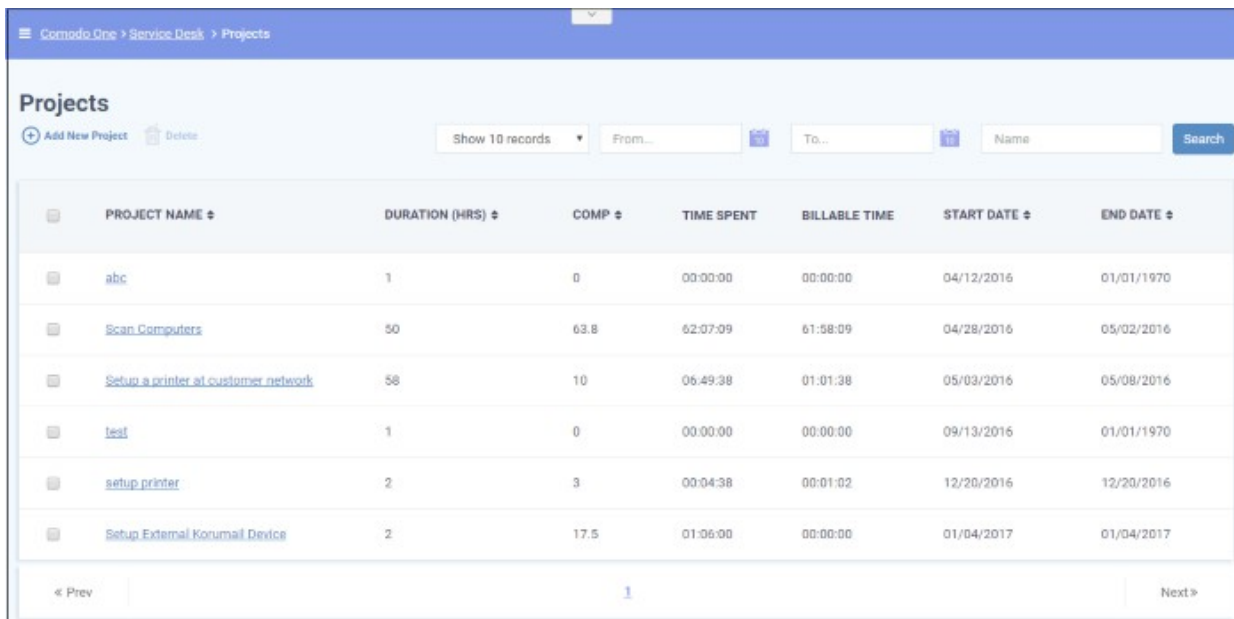
Please Confirm ✕

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

2.5 Manage Projects

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

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



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

Existing projects will be displayed in the screen.

Sorting items

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

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

Search Option

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

Column Headers

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

From the Projects interface, staff members can:

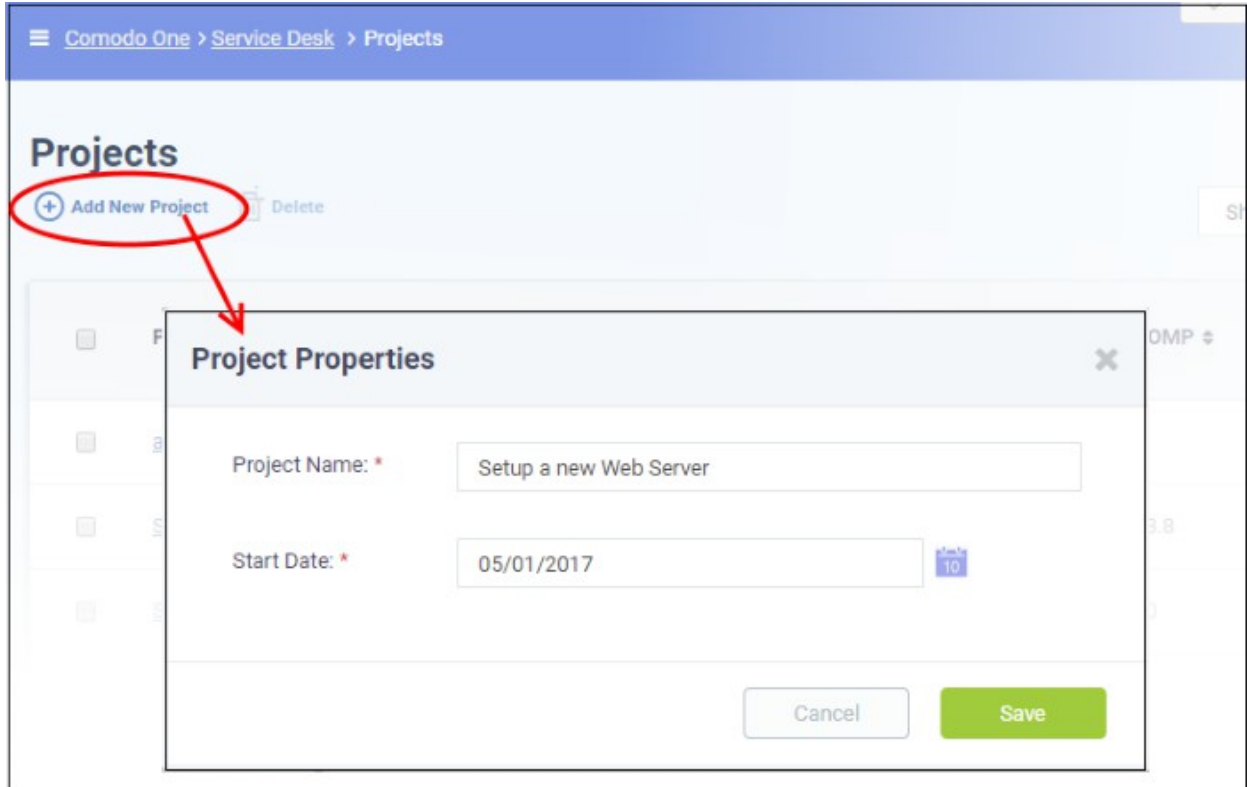
- Create a new project and add Tasks and Sub Tasks**
- View the project status and update it**
- Remove a project**

Creating a new Project

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

To create a new project

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

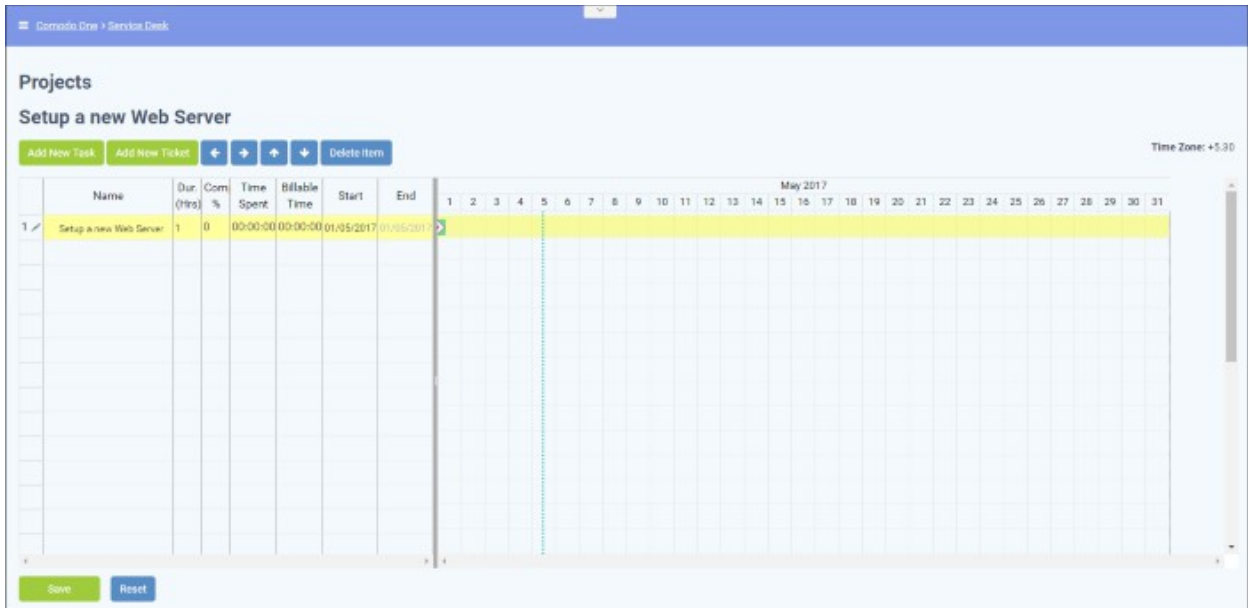


The screenshot shows the 'Projects' interface in the ITarian Service Desk. The breadcrumb navigation is 'Comodo One > Service Desk > Projects'. The 'Add New Project' button is circled in red, and a red arrow points to the 'Project Properties' dialog box. The dialog box has a title bar with a close button (X). It contains two required fields: 'Project Name: *' with the value 'Setup a new Web Server' and 'Start Date: *' with the value '05/01/2017' and a calendar icon. At the bottom of the dialog are 'Cancel' and 'Save' buttons.

The Project Properties dialog will appear.

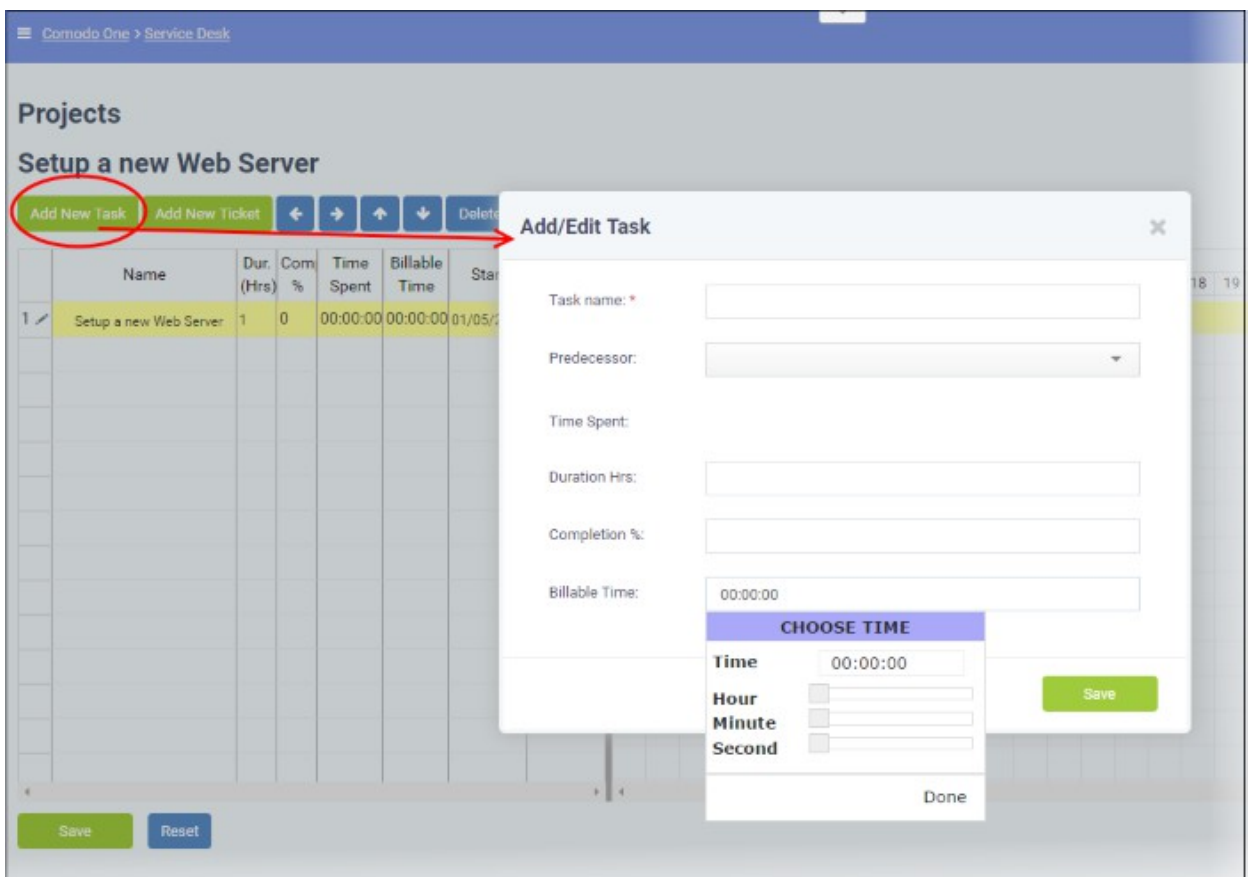
- Enter a name for the project
- Enter the project start date by clicking the calendar icon beside 'Start Date'
- Click 'Save'

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.



The screenshot shows the 'Projects' section for 'Setup a new Web Server'. A Gantt chart displays the task from May 1st to May 5th, 2017. The task is highlighted in yellow. At the top, there are buttons for 'Add New Task', 'Add New Ticket', and 'Delete Item'. The 'Add New Task' button is circled in red in the subsequent image.

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



The screenshot shows the 'Add/Edit Task' dialog box open over the Gantt chart. The 'Add New Task' button is circled in red, and an arrow points to the dialog box. The dialog box contains the following fields:

- Task name: *
- Predecessor:
- Time Spent:
- Duration Hrs:
- Completion %:
- Billable Time: 00:00:00

Below these fields is a 'CHOOSE TIME' section with a 'Time' field set to 00:00:00, and separate fields for Hour, Minute, and Second. A 'Save' button is at the bottom right of the dialog box.

The 'Add/Edit Task' dialog will appear.

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

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

Add/Edit Task ✕

Task name: *

Predecessor:

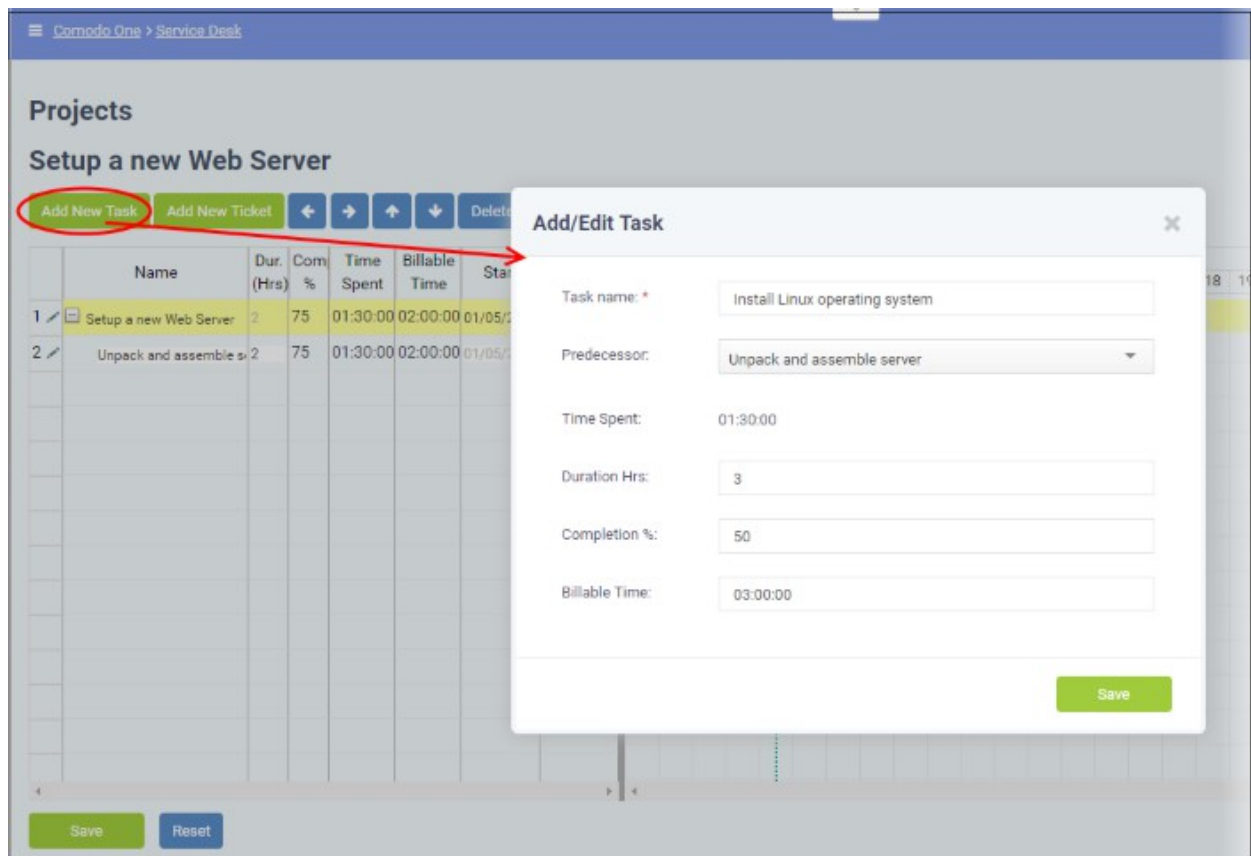
Time Spent: 01:30:00

Duration Hrs:

Completion %:

Billable Time:

- Enter the quantity of chargeable hours in the 'Billable Time' field using the sliders and click 'Save'.
- Repeat the process to add more tasks.
- To add another main task, select the project and click 'Add New Task'. This will create a sibling task.



The 'Add/Edit Task' dialog will appear.

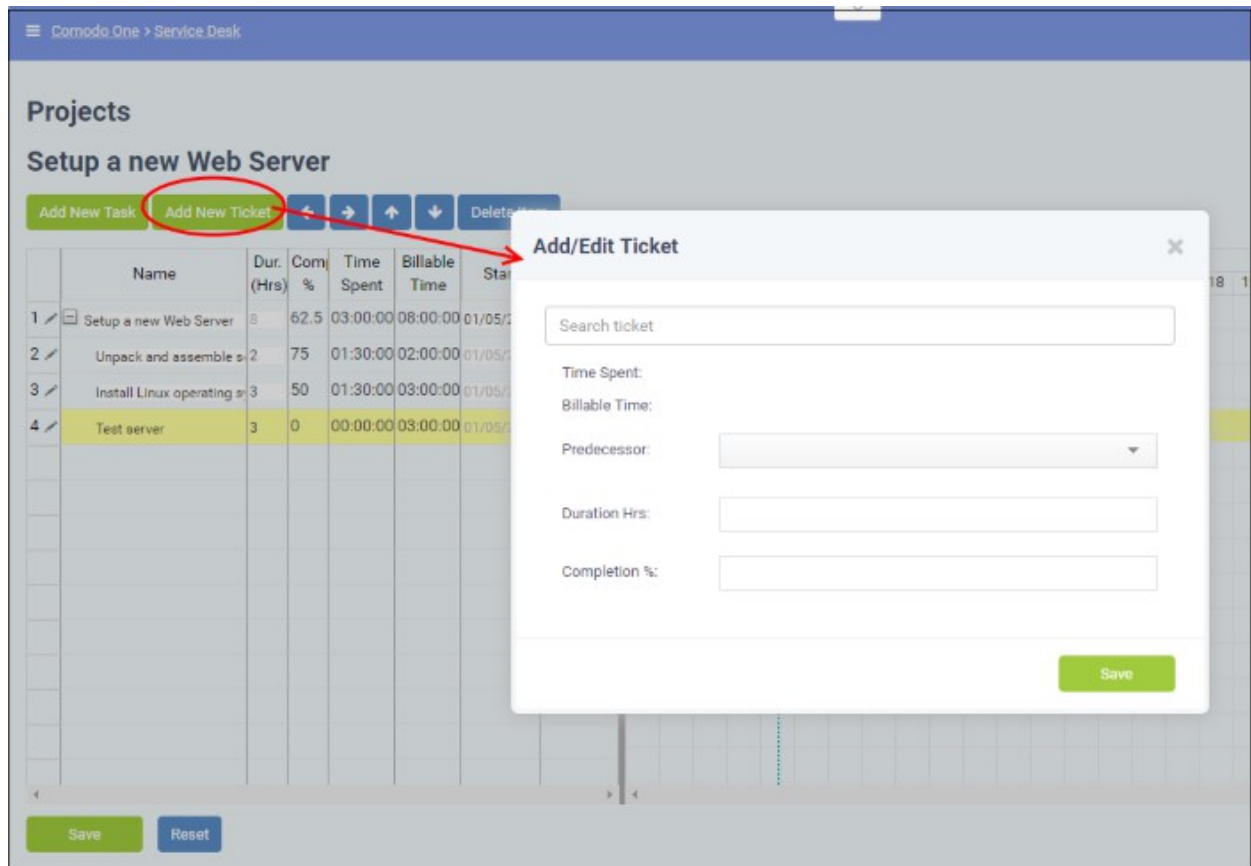
- Enter the name for the task
- Enter the predecessor to continue from the previous task/subtask.
- Enter the time duration required (in hours) to complete the task in the 'Duration' field
- If the task is in-progress, enter the completion percentage on it in the 'Completion %' field

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

- Enter the quantity of chargeable hours in the 'Billable Time' field using the sliders and click 'Save'.
- Repeat the process to add more tasks.
- To add a sub-task to a main-task:
 - Select the parent level task
 - Click the 'Add New Task' button and repeat the process as outlined **above**.

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

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



The Add/Edit ticket dialog will appear.

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

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

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

Add/Edit Ticket ✕

Ticket #23

Time Spent: 22:58:09

Billable Time: 22:58:09

Predecessor: ▼

Duration Hrs:

Completion %:

Save

- Click 'Save'.

The ticket will be linked to the task.

Projects
Setup a new Web Server

Time Zone: +5:30

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

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

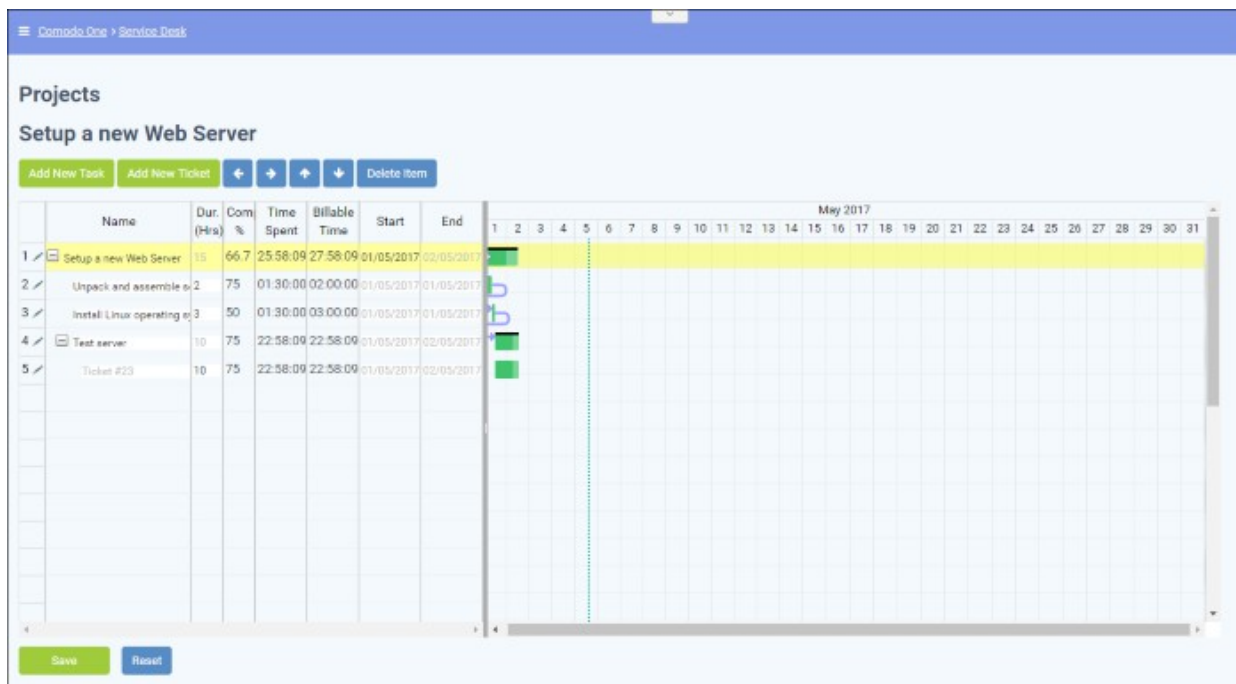
- To delete a task, sub-task, ticket or a sub-ticket, select the item and click 'Delete Item' at the top.
- Click 'Save' in the project viewer interface to save your changes.

Viewing Project Status and Updating it

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

To view a project

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



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

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

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

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

To edit/update a task

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

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

Parent Level Task

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.

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

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

- Predecessor** - Displays the previous task/sub-task from which the present task has to be continued.

- Time Spent** - Displays the actual time spent

- Click 'Save' for your changes to take effect

based on the duration hrs and completion percentage entered.

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

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

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

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

- Click 'Save' in the 'Projects' interface

To update a ticket or a sub-ticket

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

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

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

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

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

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

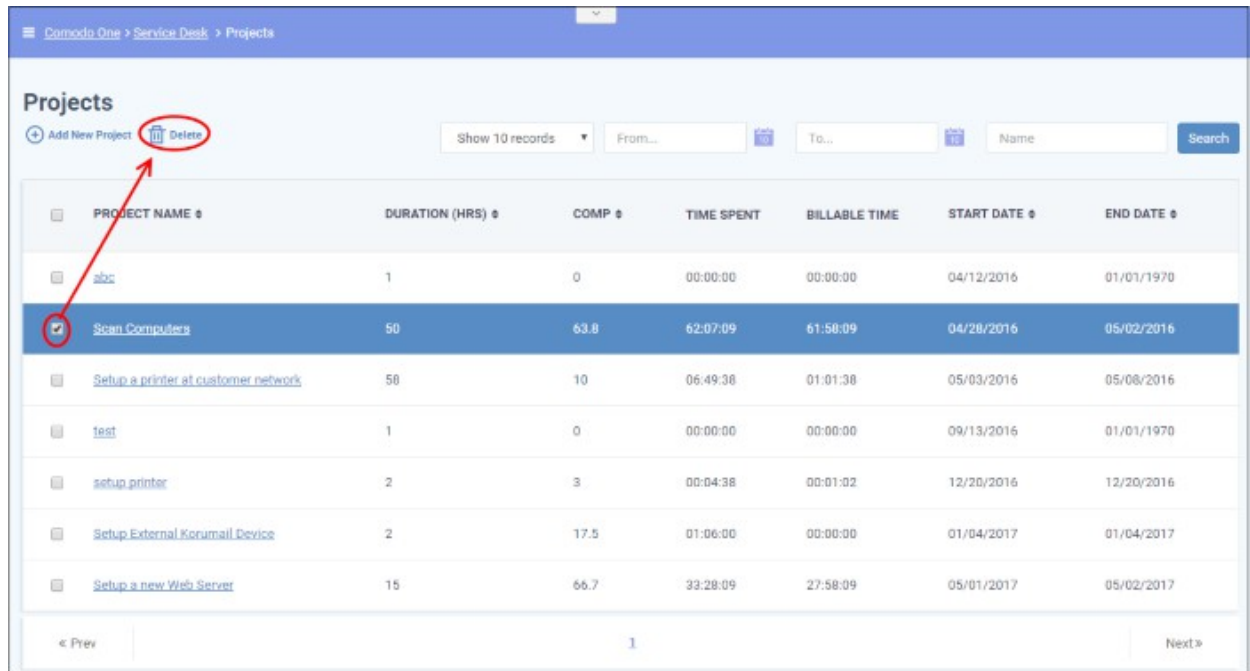
- Click 'Save' in the 'Projects' interface

Removing a Project

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

To remove project(s)

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



Comodo One > Service Desk > Projects

Projects

Show 10 records
From...
To...
Name

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

< Prev 1 Next >

A confirmation dialog will appear.

Please Confirm ✕

Are you sure you want to DELETE selected projects?

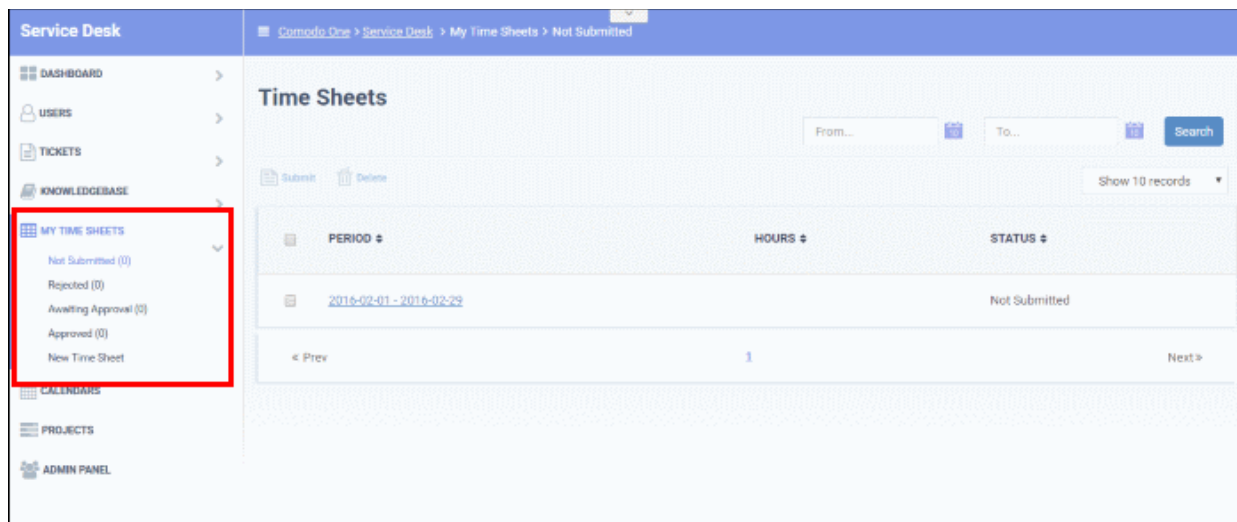
- Click 'Yes, Do it!' to remove the project

2.6 Manage Staff Time Sheets

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

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

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



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

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

Column Headers

The column headers are the same for all views:

- **Period** - Displays the date range of the time period covered by the time sheet. Clicking on the date range opens the sheet and allows you to view the entries and update/edit the tasks/time spent. See [Update 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:

- [Add a Time Sheet](#)

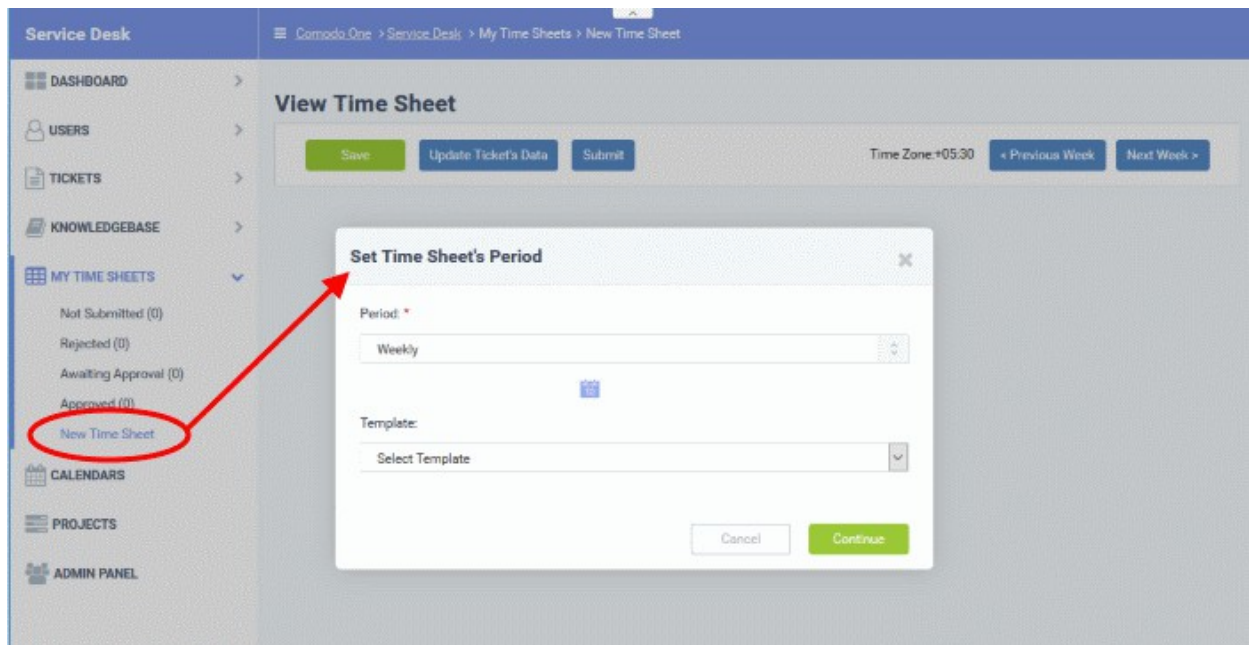
- **Update a Time Sheet**
- **Submit a Time Sheet for approval**
- **Delete a Time Sheet**

Add a Time Sheet

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

To add a new time sheet

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



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

Comodo One > Service Desk > My Time Sheets > New Time Sheet

View Time Sheet

[Save](#)
[Update Ticket's Data](#)
[Submit](#)
Time Zone: +05:30 < Previous Week Next Week >

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

A new sheet will be added for the date range with a status of 'Not Submitted'. You can update activities on the sheet and click 'Save'. See [Update Time Sheet](#) for more details.

Update a Time Sheet

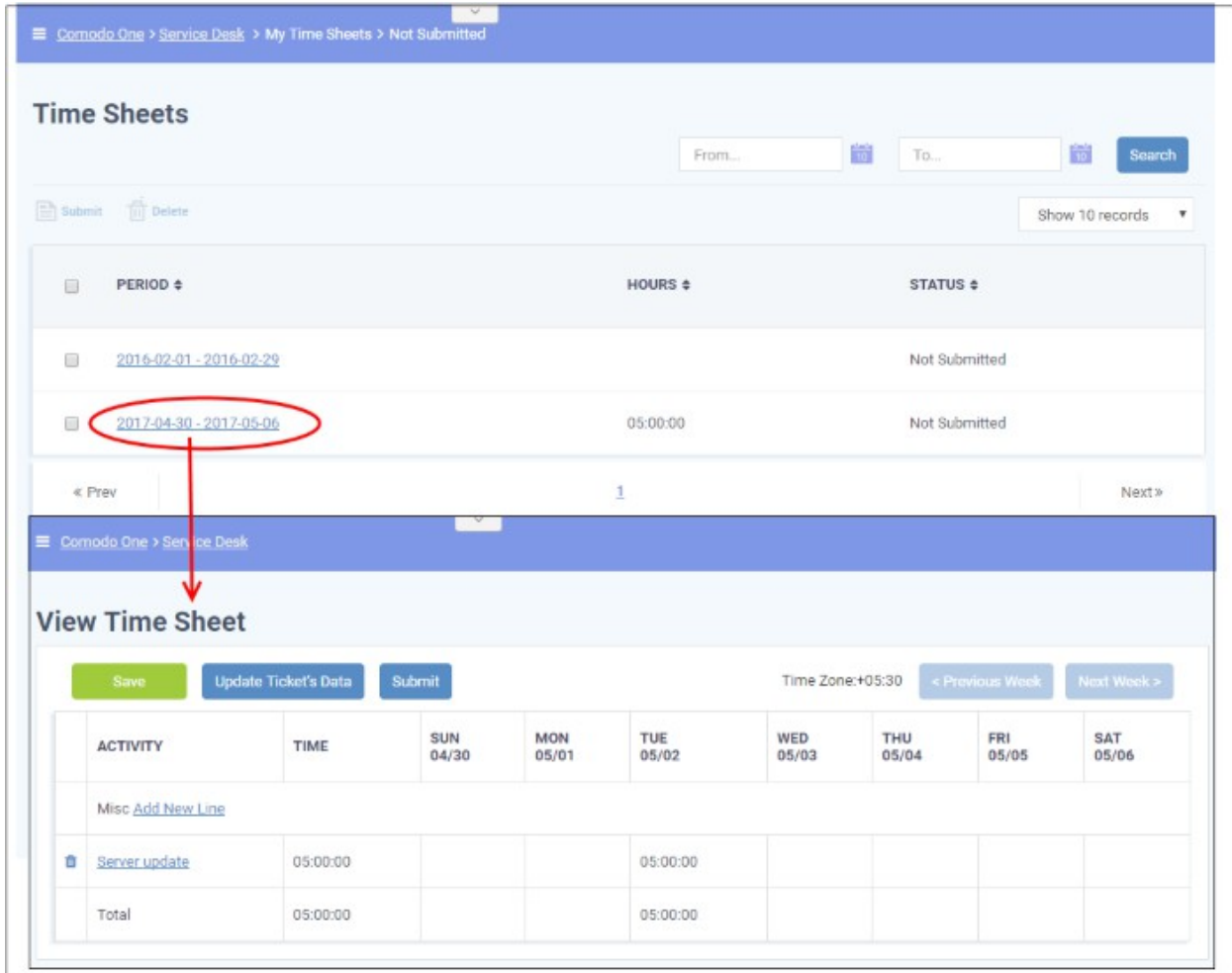
Staff can add tasks and time spent to a time-sheet in two ways:

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

To update a time sheet

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

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

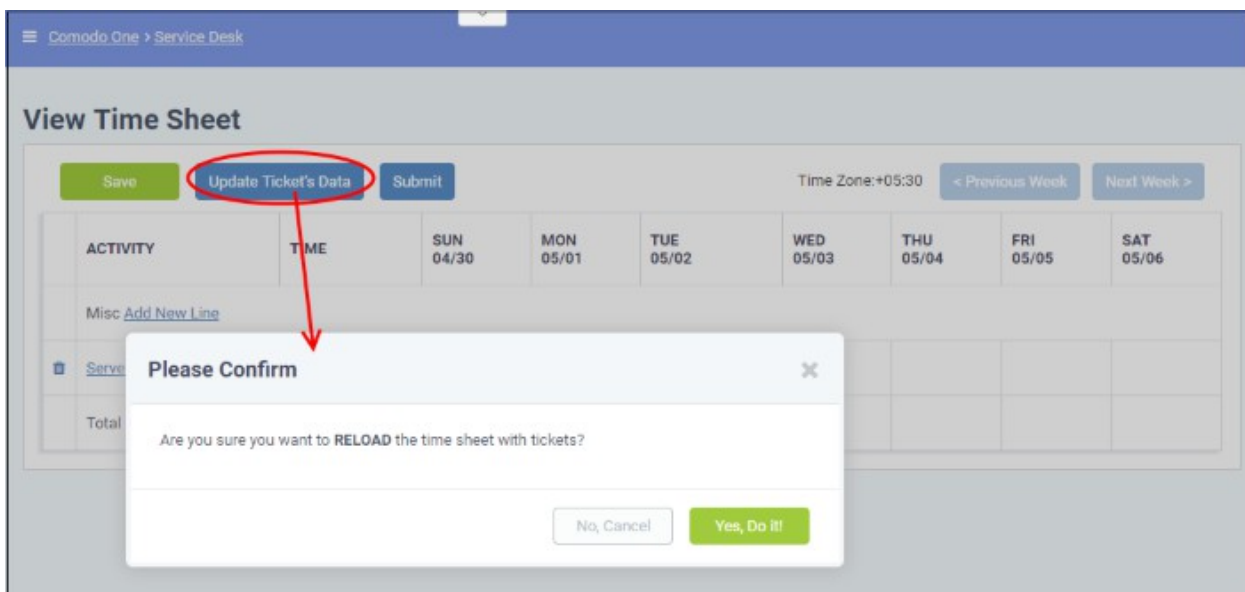


The screenshot shows the 'Time Sheets' interface. The top navigation bar includes 'Comodo One > Service Desk > My Time Sheets > Not Submitted'. The main heading is 'Time Sheets'. Below it are search filters for 'From...' and 'To...' with a 'Search' button. There are 'Submit' and 'Delete' icons and a 'Show 10 records' dropdown. A table lists time sheets with columns for 'PERIOD', 'HOURS', and 'STATUS'. The second row, '2017-04-30 - 2017-05-06', is circled in red. Below the table are 'Prev' and 'Next' buttons. A red arrow points from the circled period to the 'View Time Sheet' screen below.

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

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

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



This screenshot shows the 'View Time Sheet' screen with a confirmation dialog box overlaid. The 'Update Ticket's Data' button is circled in red, and a red arrow points from it to the dialog box. The dialog box is titled 'Please Confirm' and contains the text: 'Are you sure you want to RELOAD the time sheet with tickets?'. At the bottom of the dialog are two buttons: 'No, Cancel' and 'Yes, Do It!'.

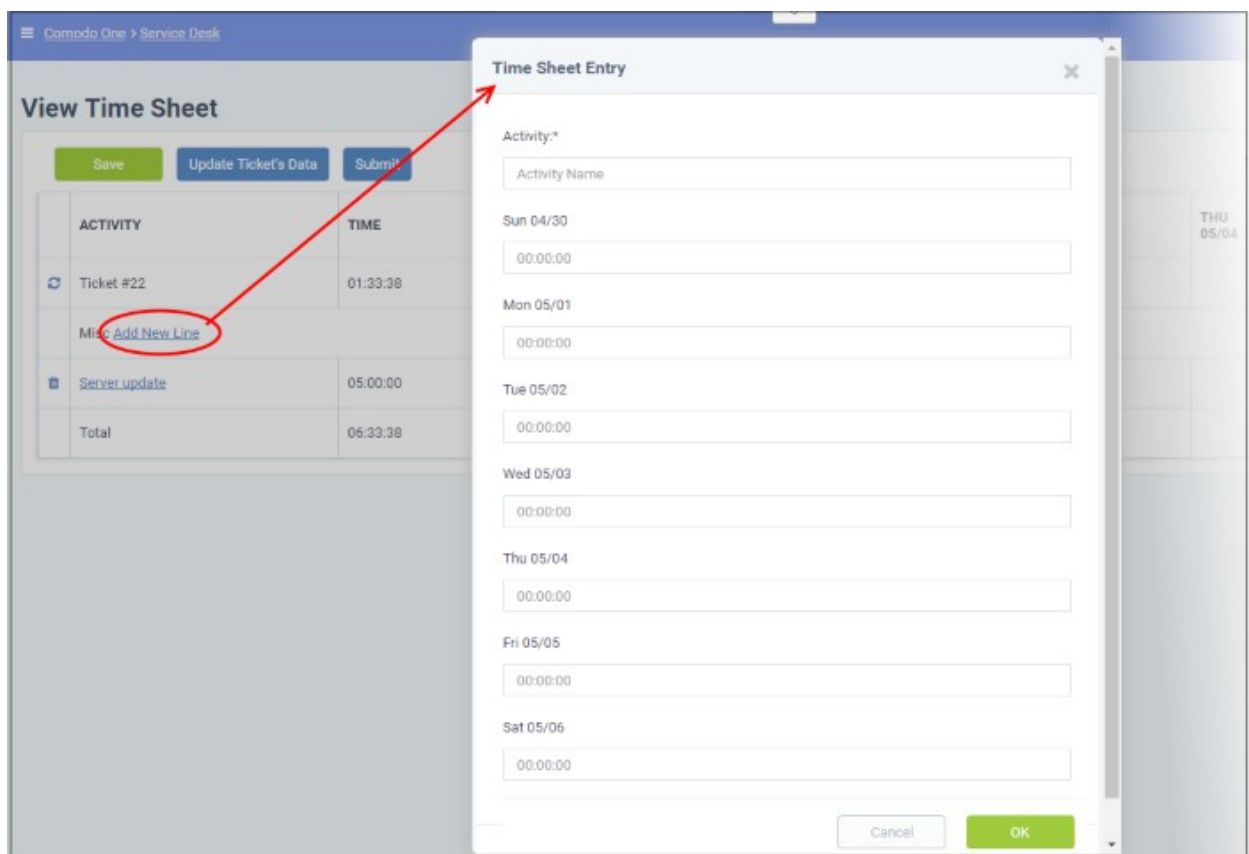
- Click 'Yes, Do it!' in the confirmation dialog

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

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

View Time Sheet		Time Zone:+05:30 < Previous Week Next Week >						
ACTIVITY	TIME	SUN 04/30	MON 05/01	TUE 05/02	WED 05/03	THU 05/04	FRI 05/05	SAT 05/06
Ticket #22	01:33:38				01:33:38			
Misc Add New Line								
Server update	05:00:00			05:00:00				
Total	06:33:38			05:00:00	01:33:38			

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



The 'Time Sheet Entry' dialog box contains the following fields:

- Activity* (text input field)
- Sun 04/30 (time input field)
- Mon 05/01 (time input field)
- Tue 05/02 (time input field)
- Wed 05/03 (time input field)
- Thu 05/04 (time input field)
- Fri 05/05 (time input field)
- Sat 05/06 (time input field)

Buttons: Cancel, OK

The 'Time Sheet Entry' dialog will appear.

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

Activity:*
Windows OS update

Sun 04/30
00:00:00

Mon 05/01
07:00:00

Tue 05/02
05:00:00

CHOOSE TIME

Time

Hour

Minute

Second

Done

Fri 05/05
00:00:00

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

The activity will be added to the list.

View Time Sheet

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

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

- Click 'Save' for your changes to take effect

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

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

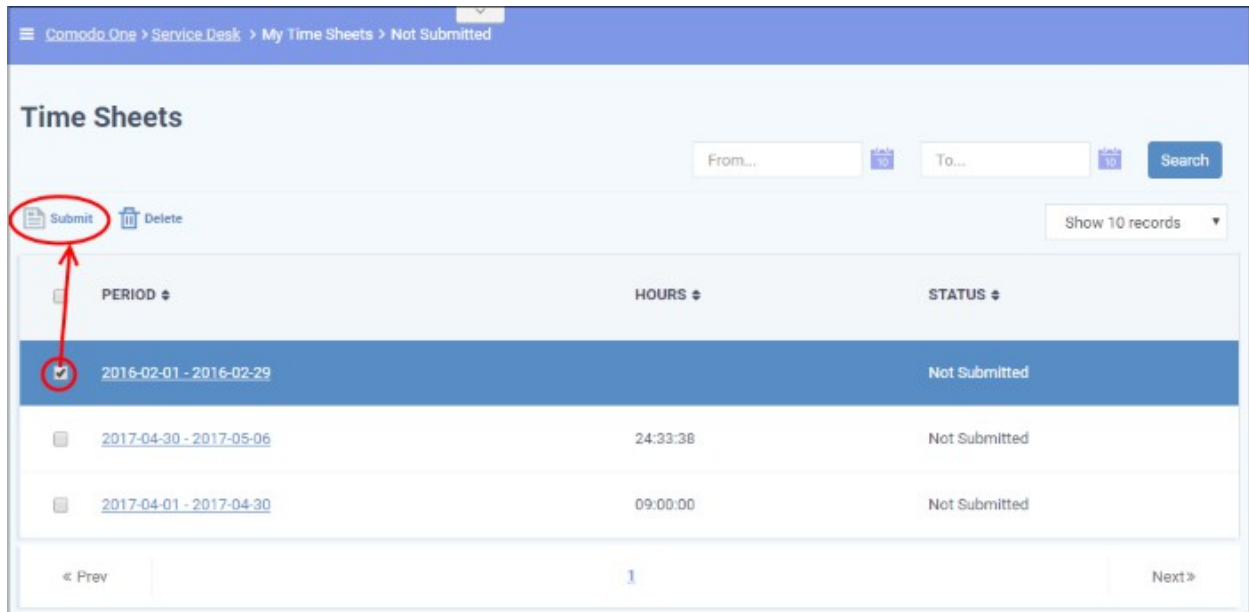
Submit a Time Sheet for Approval

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

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

To submit time sheet(s)

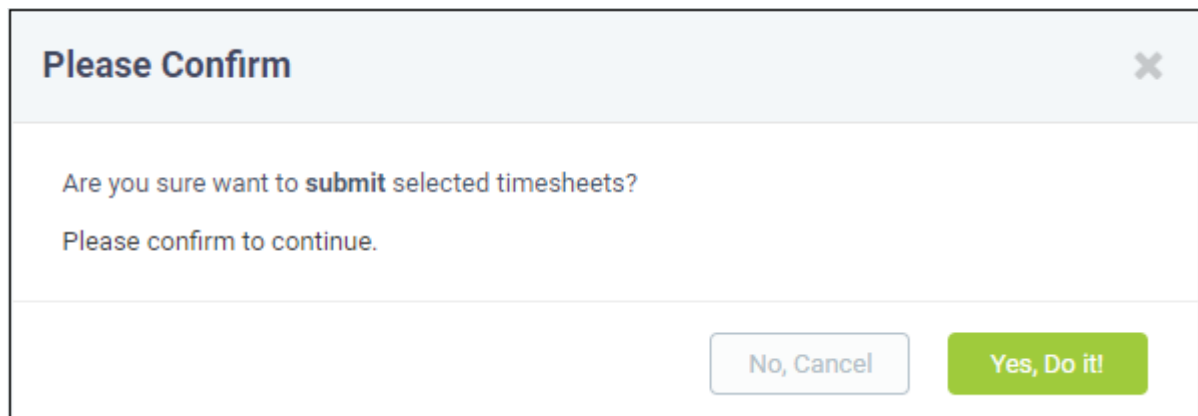
- Click 'Not Submitted' on the left under 'My Time Sheets' in the staff panel
- Select the time sheet(s) to be submitted and click 'Submit'



The screenshot shows the 'Time Sheets' interface. At the top, there is a breadcrumb trail: 'Comodo_One > Service Desk > My Time Sheets > Not Submitted'. Below this, the title 'Time Sheets' is displayed. To the right of the title are search filters for 'From...' and 'To...' with calendar icons, and a 'Search' button. Below the filters are two buttons: 'Submit' (circled in red) and 'Delete'. To the right of these buttons is a dropdown menu set to 'Show 10 records'. The main content is a table with three columns: 'PERIOD', 'HOURS', and 'STATUS'. The first row is highlighted in blue and has a checkmark in the 'PERIOD' column. The second and third rows are white. At the bottom, there are navigation buttons: '<< Prev', '1', and 'Next >>'. The 'Submit' button is circled in red, and a red arrow points from it to the checkmark in the first row of the table.

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

A confirmation dialog will appear.



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

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

View Time Sheet

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

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

Delete a Time Sheet

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

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

To remove time sheet(s)

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

Time Sheets

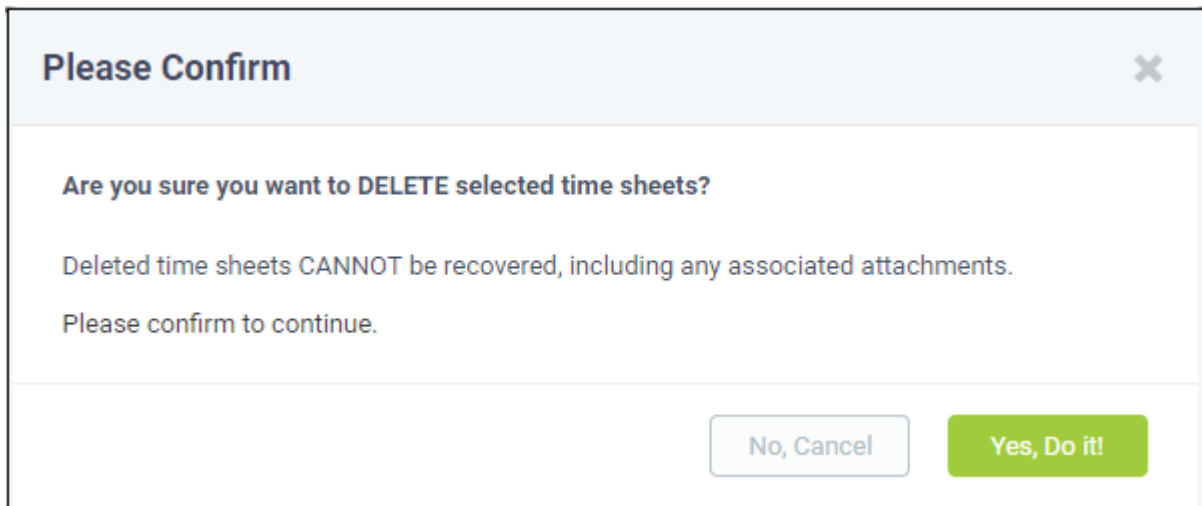
From... To... Search

Submit Delete
Show 10 records

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

« Prev 1 Next »

A confirmation dialog will appear.



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

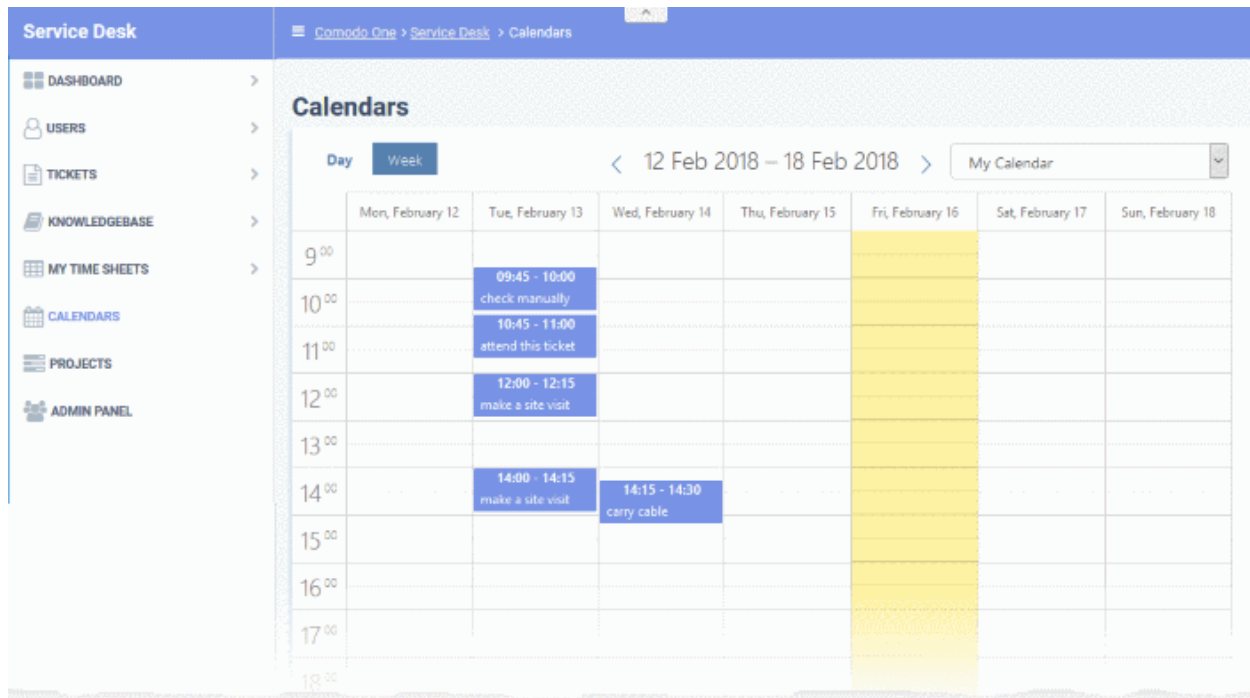
2.7 Manage Calendars

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

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

To view the calendars interface

- Open the 'Staff' panel (see last link on the left)
- Click 'Calendars' on the left
 - The current week will be displayed by default. You can view the current week or day by clicking the respective button above the calendar.
 - To move to previous/next week/day, use the '<' and '>' buttons above the table.

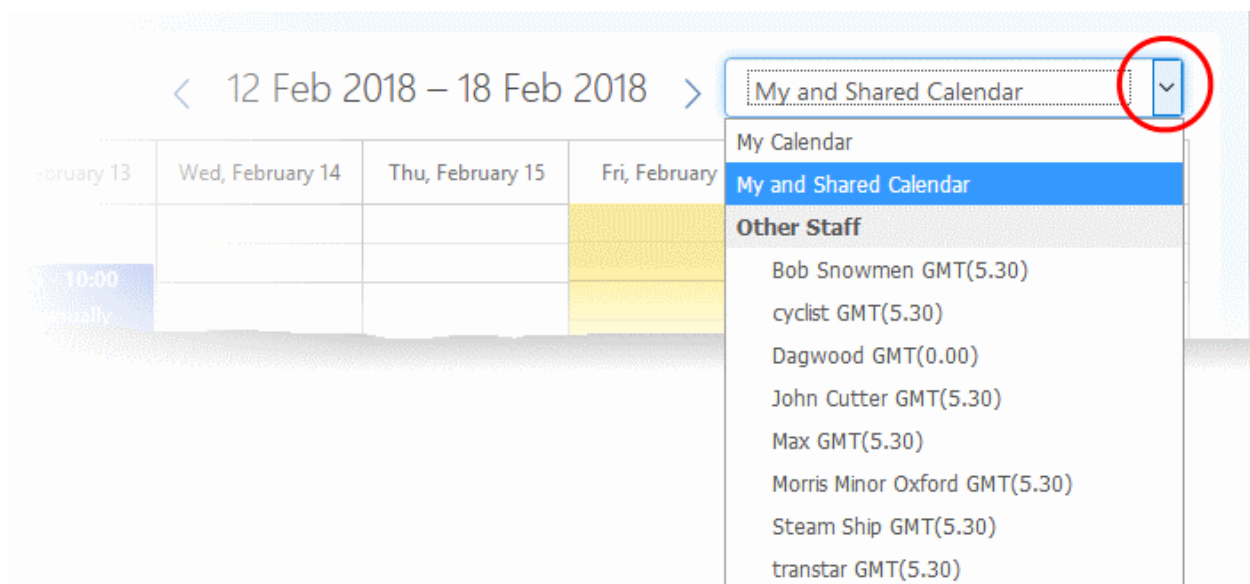


The following sections explain more about:

- [View calendars](#)
- [Create a manual calendar entry](#)
- [View details and manage a calendar Entry](#)

View Calendars

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



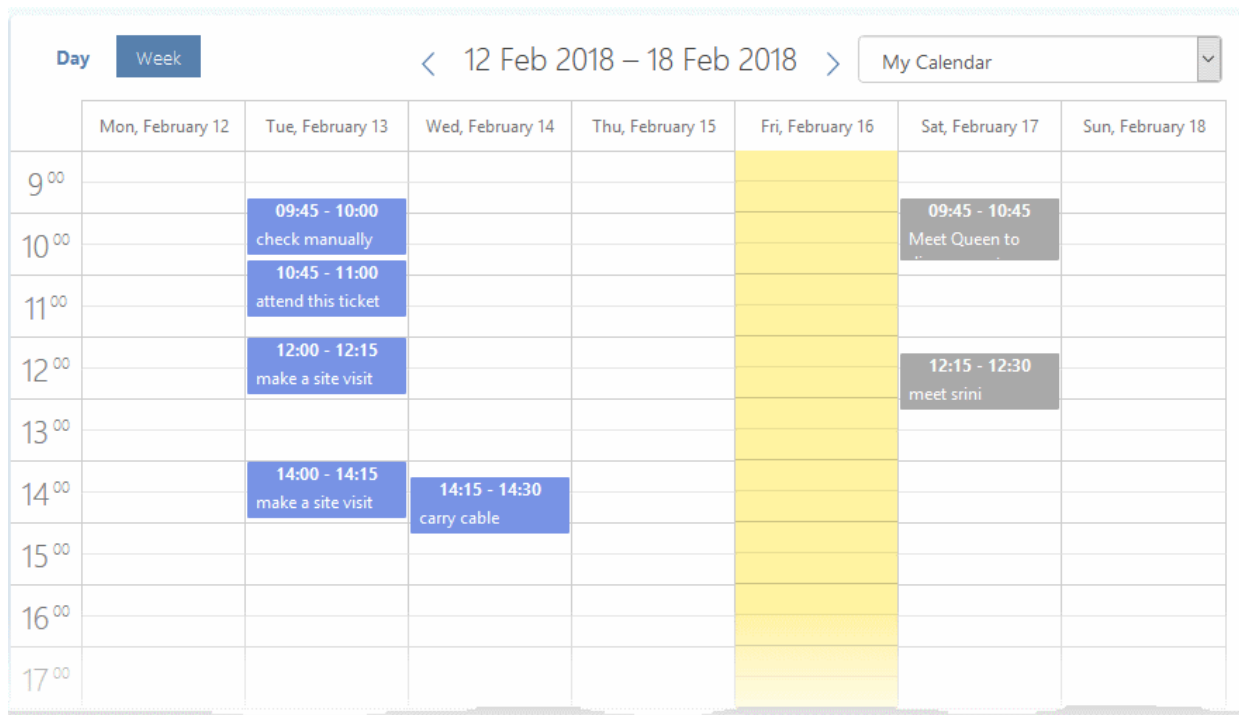
- My Calendar - Displays calendar events scheduled for you. The entries include:
 - Events manually added by you
 - Scheduled events created in tickets assigned to you
 - Events scheduled for you by admins and other staff members

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

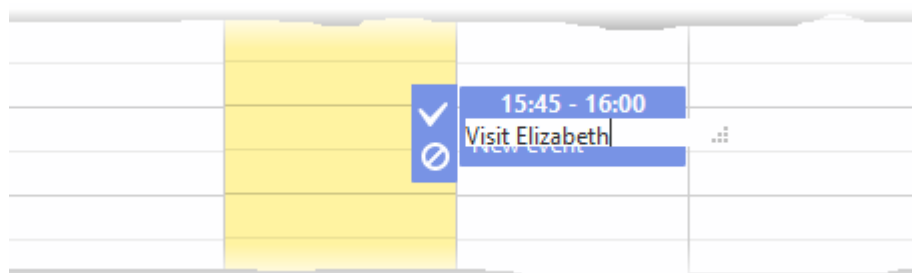
Create a Manual Calendar Entry

You can schedule events for yourself and other staff members:

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



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



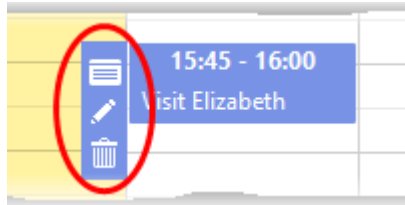
- Enter a short description of the task
- Click the tick mark to save the entry
- To share an event with others:
 - Click on the event
 - Click the 'Edit' icon that appears on the left (the top icon of the three)
 - Enable the 'Shared' check-box
 - Click 'Save'. See View Details and Manage a Calendar 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: <ul style="list-style-type: none"> • View and modify event description • Associate tickets with the event • Share or unshare the event • View and change the scheduled time of the event See Edit details of the calendar entry for more details
	Edit the description of the event.
	Remove the event

Edit details of the calendar entry

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

The 'Appointment Edit' dialog will appear:

Appointment Edit ?

Description

Tickets

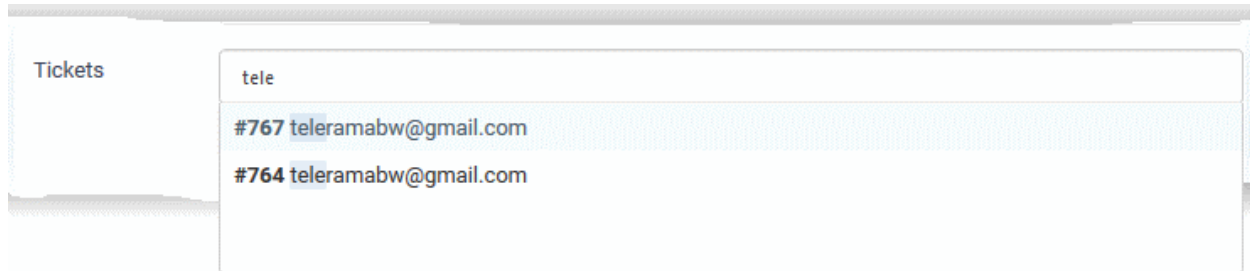
Shared

Full day
 15:45 ▾
17 ▾
February ▾
2018 ▾
-
16:00 ▾
17 ▾
February ▾
2018 ▾

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

multiple tickets to a calendar entry.

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



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

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