Chronodat Help Desk

(User Manual)

By

CHRONODAT, LLC

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For support, contact us at support@chronodat.com
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Introduction

The introduction section of the document describes the scope and objective of Office 365 Chronodat Help Desk Add-in.

Scope & Objective

Chronodat Help Desk provides a seamless integration of Help Desk features, using Office 365 SharePoint Online. The impact of Help Desk add-in can be realized via the all-round features and user-friendly interfaces it provides.

The primary objective of Chronodat Help Desk add-in is to create a Help Desk request and track it to its end resolution. For example, opening a request & assigning it to a Help Desk team member to be worked > working on it > resolving it > then closing it. This request process is what's known as a workflow. If your team is Scrum or Agile-based, the design of Help Desk adds-in will be very familiar to you.

The difference in our Help Desk add-in workflow from all the others is that it benefits the REQUESTOR (or end user), *every step of the way*. The user receives an email notification each time the request changes Status so that the user *knows* progress is being made, and then is notified at the very end when the request has been resolved.

Add-in Overview

Office 365 Help Desk is a pure SharePoint features wrapped up into an awesome device friendly add-in. Using this add-in your support team can quickly visualize existing support tickets by team, priority, category or age to understand current and overdue support tickets. IT Support Team or Users can submit new supports. Using personalized dashboard and requests board (agile task view), Support Team members can see just those tickets which are assigned to themselves with easy to abstract charts and graphs.

Features:

- Support requests can be created using a pre-defined request prefix example: **“IT-SERV-2016-1**”.

- Pre-defined **Request Categories** (such as Hardware, Software, etc.), & **Request Sub-Categories** (such as broken monitor, need Microsoft Office installed, etc.), *all configurable according to your business*

- Pre-defined **Resolution Categories**, such as Fixed, Cannot Reproduce, Works as Designed, Canceled, etc., *all configurable according to your business*

- Pre-written Email Templates for notifications sent to the user, *again, configurable according to your business*

- Color-coded, built-in dashboards for quick metrics & reporting, with no configuration needed; there is a **Global Dashboard** for **all requests**, and a **personal Dashboard** for each team member. In both types of Dashboards, you see:
    - 10 most recently updated requests, by **Status**
    - Request Status **pie chart** (Active vs. Closed)
    - Request Status **bar chart**, based on **Priority**
    - Request Status **bell curve chart,** based on **Category**
    - Request Status **grid**, based on **Assigned To**
    - 5 most recently updated requests, regardless of Priority or Status

- A Requests Board, with column-based board views, with a drag & drop feature for quickly changing Statuses

- Powerful Search engine to find requests quickly & easily

- Export options, such as Excel, PDF, CSV, and more

- Setup for designating Help Desk Support Contacts

- Help Desk document repository for uploading & storing documents for the Help Desk team to share and use

- A Team Calendar to keep track of system outages, freeze periods in your business, team social events, etc.

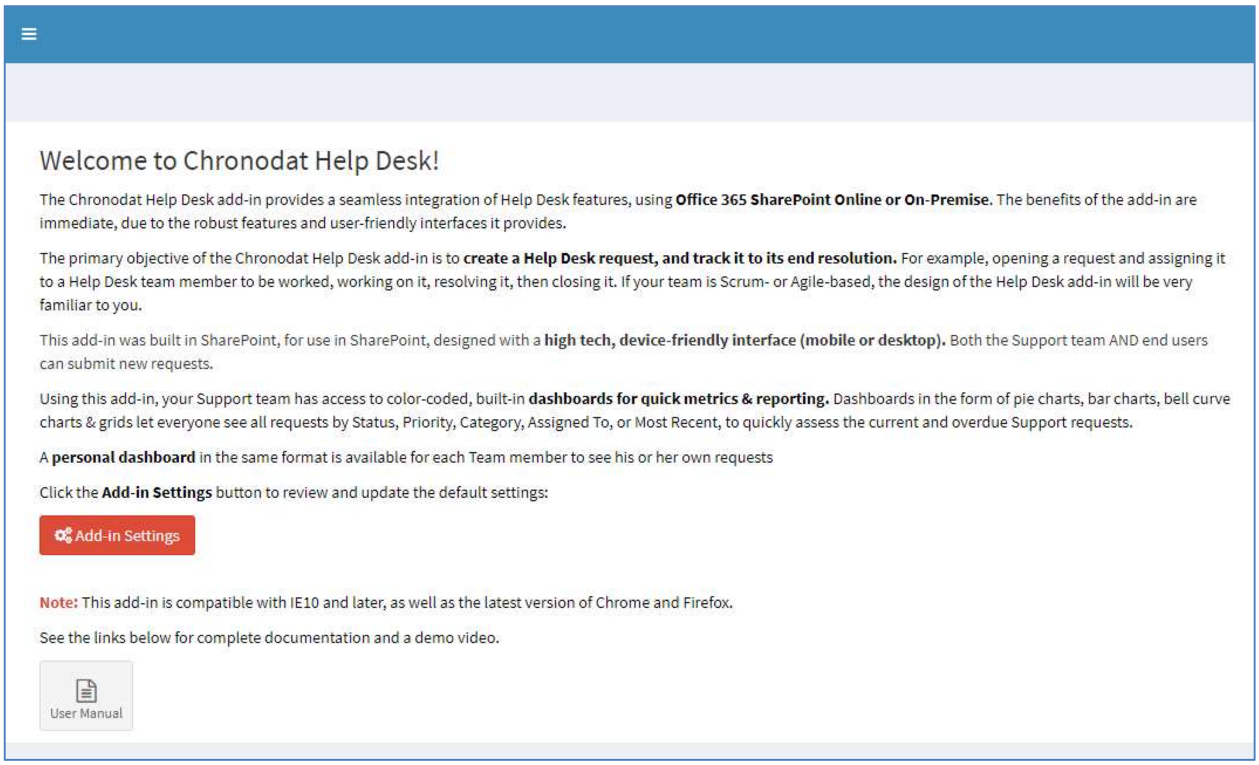
- Security is built-in, and user access is very customizable.

- Help Desk Survey

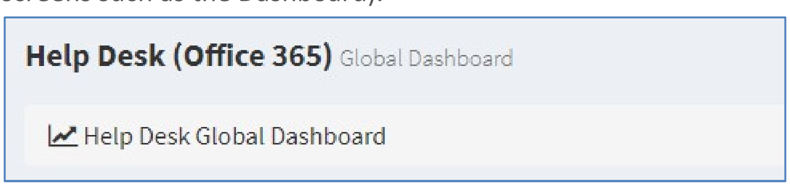
Configuring Chronodat Help Desk Add-in

1. Click **Chronodat Help Desk**.

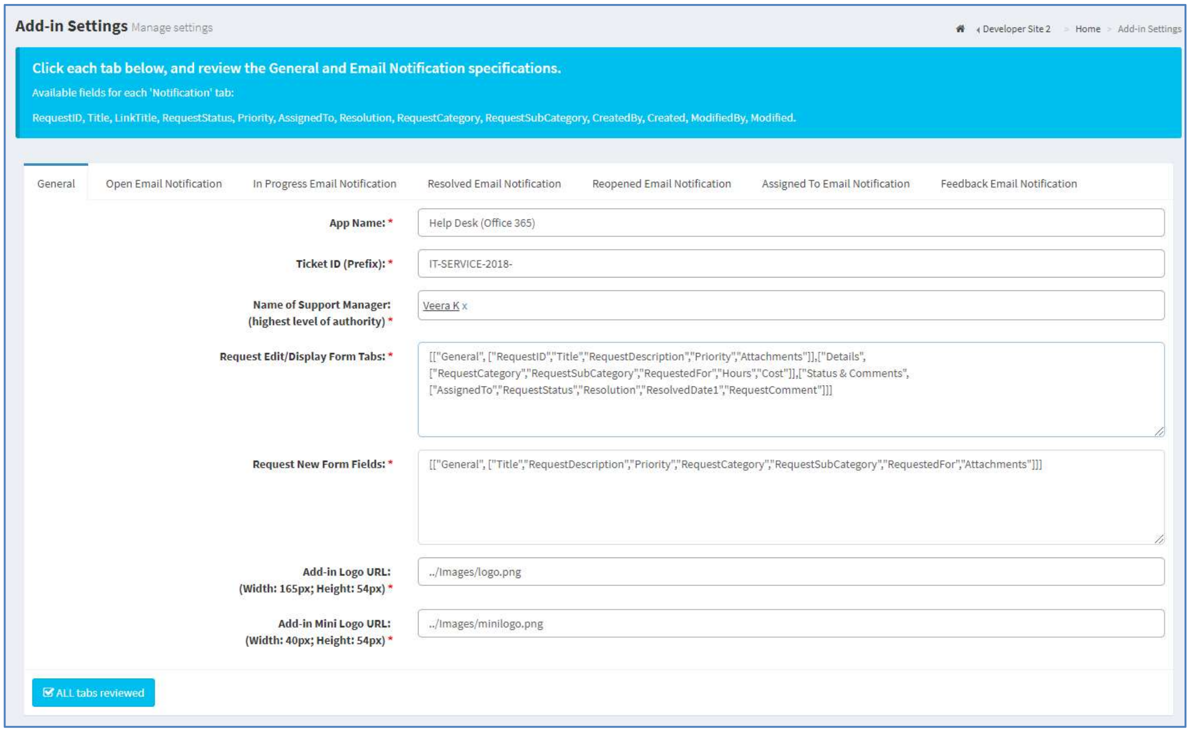
2. Click the red button to review the Add-in Settings.



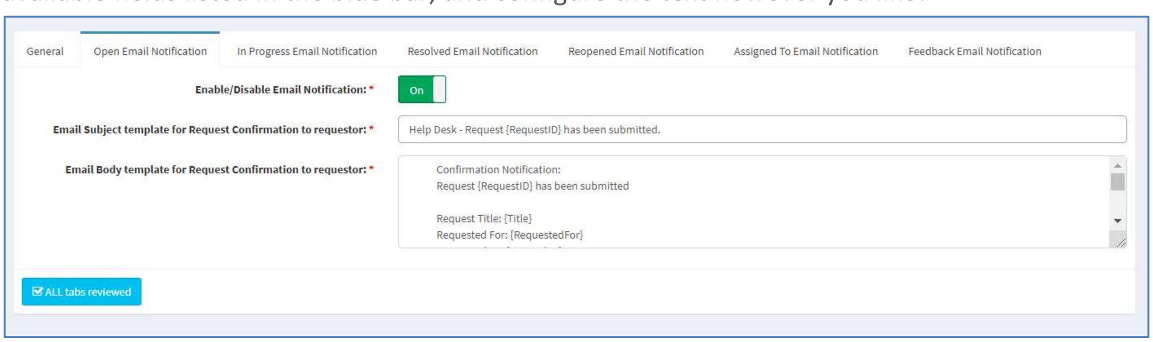
3. On the **General** tab, enter the name you want for your Help Desk add-in (it will display on screens such as the Dashboard).



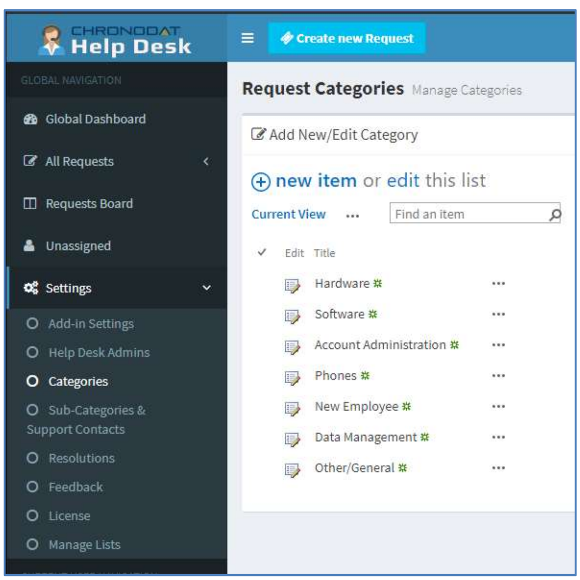
- Then add the name of the Support Manager. This person is the Admin, and has the highest level of access.



4. Click the next tab in sequence. You may be tempted to press **Save**, but you need to finish reviewing all the other tabs. If you do, however, click **Save**, you can always quickly get back to this screen by clicking **Settings > Add-in Settings**. This tab allows you to configure the email that will be sent to the user after **submitting a request**.
   - If you don't want the user to receive an email, just click **Disable**. If you do want the user to receive an email, leave the default.
   - The first field is how the **subject line** will display in the email to the user. You can either change the text or leave the default.
   - Notice how the Subject contains {RequestID}. Not only can you use that field, but a host of other fields, which are listed in the blue bar above.
   - The next field contains the text in the **body** of the email to the user. Again, use the available fields listed in the blue bar, and configure the text however you like!

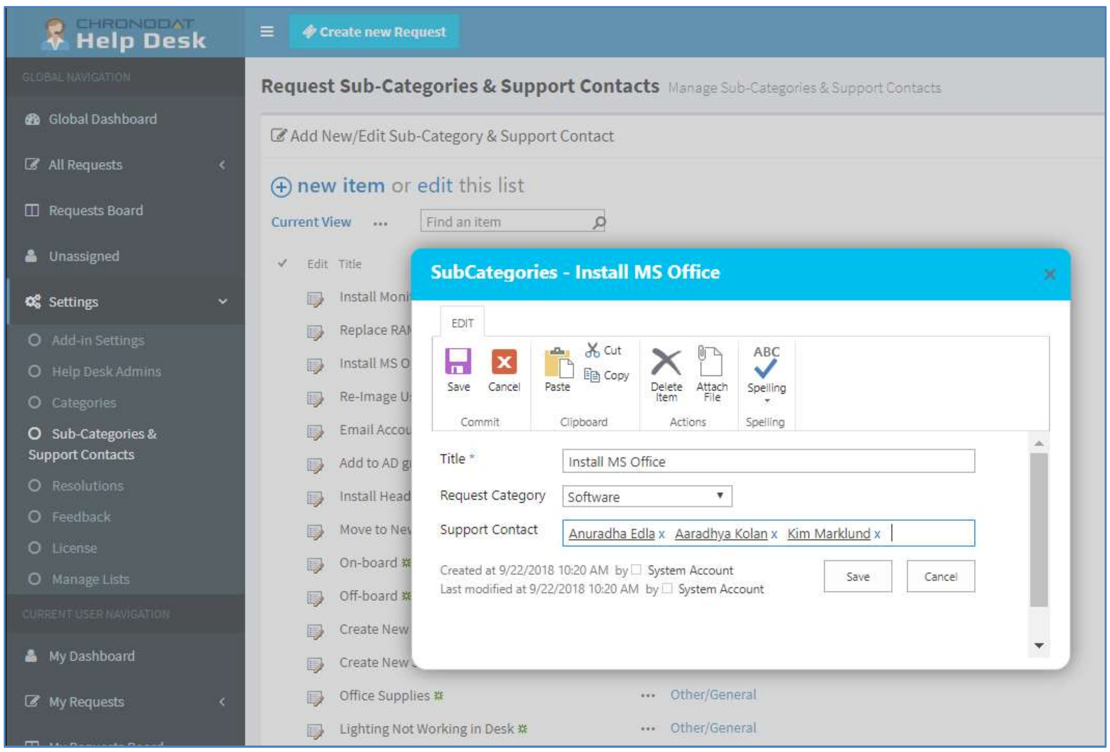


5. When finished, click the next tab in sequence. This tab is very similar, but it's for the email that the user sees when the request has moved to **In Progress**.
   - Again, you can turn it off by clicking **Disable**.
   - Configure the subject line in this field. Remember you can use the available fields in the blue bar above.
   - Configure the body of the email in this field.
6. The rest of the tabs function the same way.
   - This tab is for the email sent when the request has been **Resolved**.
   - This tab is for the email sent when the request has been **Reopened**. That means the request when through the entire workflow (ending with **Resolved**), but it wasn't truly resolved, and had to be reopened. When a request is reopened, **the Support Manager is cc'd on the email notification, so that he or she is aware that something didn't go quite right**.
   - The last tab is for the email sent to the Help Desk member who will be working the request.
7. Once you're finished reviewing all the tabs, click the blue button at the bottom. *As mentioned before, you can always go back and make some adjustments if you change your mind! Just click* **Settings > Add-in Settings**.
8. Now Add-in redirects to Dashboard page (Empty Dashboard).
9. Next, you click **Settings > Categories**. This screen is for defining the high-level Categories that your requests will be listed under. You can add a new Category by clicking **New Item** or **edit** the Categories that are listed by clicking Edit this list. I'll show you both.
   - **New Item** > I'll enter **Air Conditioning/Heating**, then click **Save**.



   - I'll now click **Edit this list**. To make changes, click the ellipses beside an item. I want **Other/General** to say just **Other**, so I'll click the ellipses beside it, **Edit Item**, remove the unwanted text, **Save**, then click **Stop editing this list**.

10. Next, you click **Sub-Categories & Support Contacts**. Since we just defined our high-level Categories, now we want to define their Sub-Categories, and designate a Help Desk Support Contact for each.
    - Remember we saw **Hardware, Software**, etc.? Well, notice how there is **Install Monitor** and **Replace RAM** under **Hardware**. Install **MS Office**, **Re-Image User Machine** under **Software**. You get the idea.
    - You make changes the same way – you click **New Item** or **Edit this list**.
    - Beside each item, you need to designate a default **Support Contact** so that anytime a request is put in under this Category & Sub-Category, it will automatically be assigned to that person, and he or she will receive an email notification (along with the user) when a new request is submitted.



    - If your Support Team is already part of a SharePoint group, you can assign that SharePoint group as your Support Team in Chronodat Help Desk, which we'll see more about in the **Security** section of this video.
        - I'll go through one example: click the ellipses, **Edit Item**, I'll enter Lee, I'll select **John Lee**, **Save**, then click **Stop editing this list**.
        - You would then continue with the remaining items in the list in the same way.
11. Now that we've defined the Categories, Sub-Categories, and designated Support Contacts, we want to configure the Request Resolutions, so I'll click **Resolutions** on the left. These are closing resolutions when a request has been evaluated or worked. Again, click **New Item** or **Edit this list**.

Navigation

General Navigation

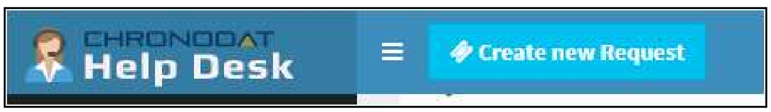
Navigation options are found in the left margin. The arrows function as a toggle, and indicate more menu items below. There are 3 sections: a **Global** section for viewing ALL requests, a **User** section for viewing your own requests, and a section for **Help Desk Documents** and a **Team Calendar**. We'll be going through each of these items in more detail.

Navigating to the Dashboard

You can click the **Home** (house) icon at the top right, the **Chronodat Help Desk** icon at the top left, or **Dashboard** in the left navigation to go to the Dashboard. All 3 methods take you to the same place.

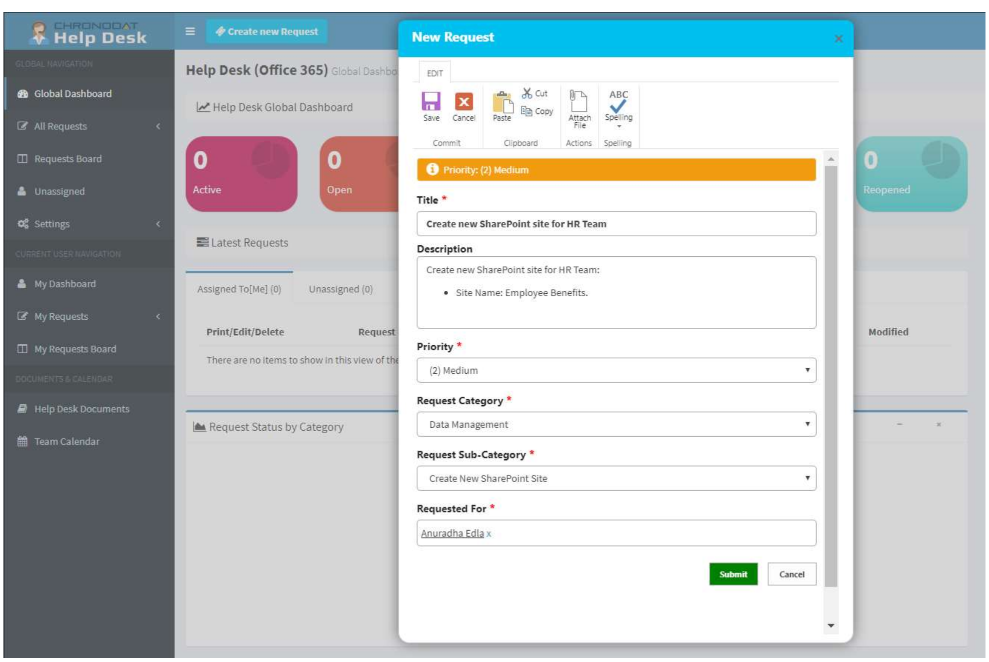
Hiding the Left Navigation

You can click the 'bar' icon at the top left (next to **Create new Request**) to hide the left navigation, thus widening the information on the page that is currently displayed.



Creating a New Request

Now that we've covered the basic navigation, let's create a request. Click the **Create New Request** button at the top left. Complete the fields (required fields are indicated by a red asterisk), then click **Submit**.

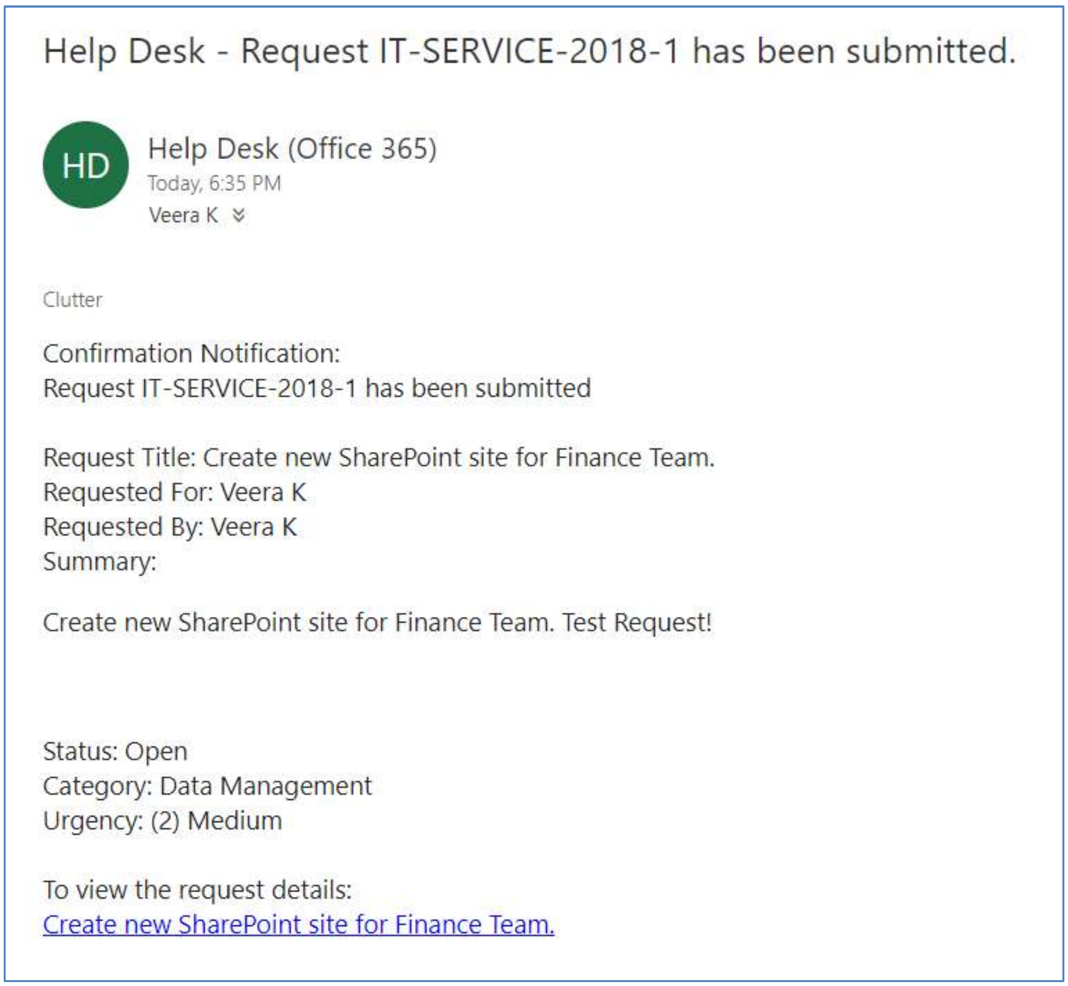


Assigning a Request

- Requests are automatically assigned to the Support Contact defined in the Sub-Categories list.
- You can, however, *manually* assign a different Support Contact to the request.
- If a Support Contact is not defined, the request will be assigned to the user who creates the request.

Open the request by clicking on the **Request ID**. Click **Edit Item**, then enter a Help Desk member under **Assigned To** (just start typing the first few letters of the last name), then click **Save**.

Requester and Support Contact receive email notifications.



Help Desk - Request IT-SERVICE-2018-1 has been submitted.

HD

Help Desk (Office 365)
Today, 6:35 PM
Veera K

Clutter

Confirmation Notification:
Request IT-SERVICE-2018-1 has been submitted

Request Title: Create new SharePoint site for Finance Team.
Requested For: Veera K
Requested By: Veera K
Summary:

Create new SharePoint site for Finance Team. Test Request!

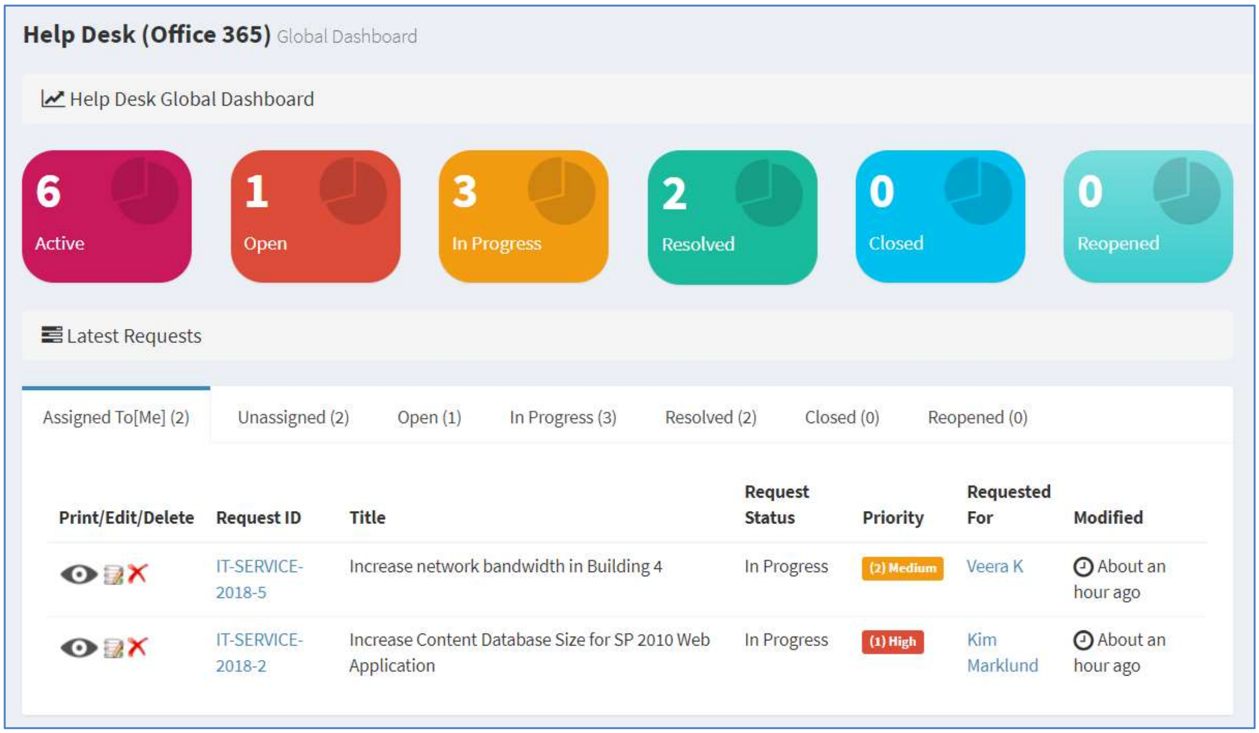
Status: Open
Category: Data Management
Urgency: (2) Medium

To view the request details:
Create new SharePoint site for Finance Team.

Dashboards

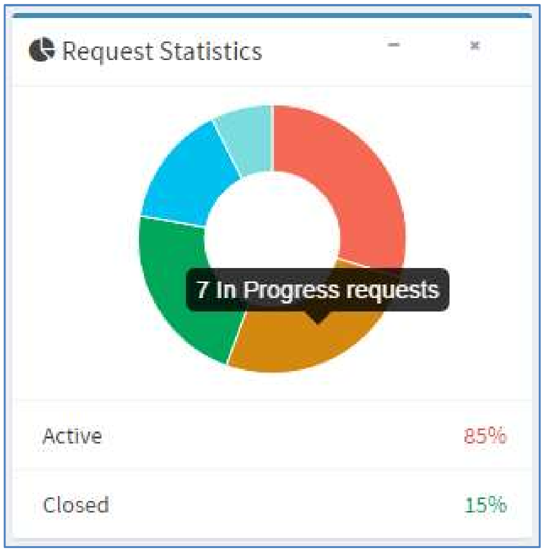
We understand the **importance of reporting**, so forget your Excel spreadsheets and the manual work of chasing down unresolved requests. The Dashboards will give you your reporting statistics.

Click **Global Dashboard**. The Statuses are listed horizontally above. **Active means anything not in a Closed or Archived state**.



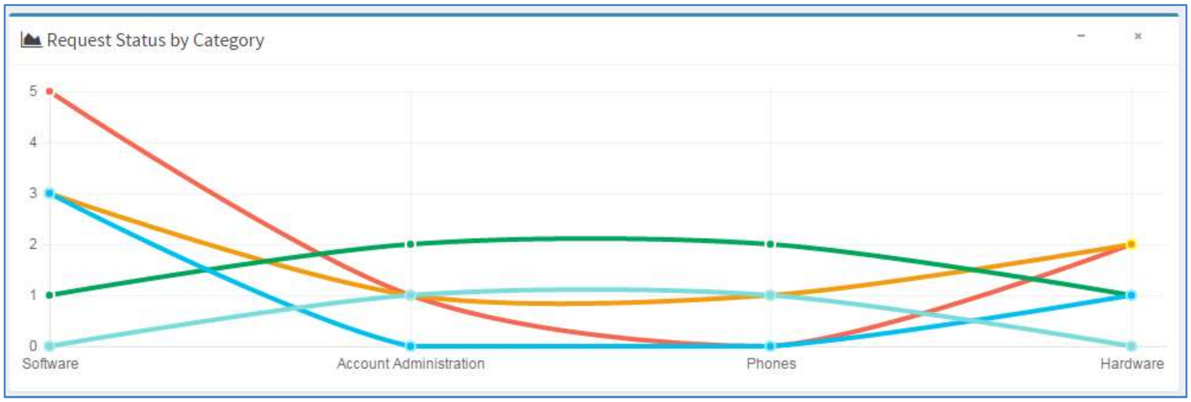
The large boxes on the top match the tabs below it. Scroll through the tabs to see the respective requests for each Status. The list contains the latest **10 requests** for each Status.

Notice the **pie chart** on the right, which gives you a visual of the **Active vs**. **Closed** requests, and quickly lets you see that there are a lot more requests that are **Active** than **Closed**.



The **bar chart** gives you a quick assessment **by Priority** for each Status. Red indicates High, Yellow is Medium, and Green is Low priority. So for the Open status, 4 tickets are **High** priority. For **In Progress**, 3 are Low priority, and so on.

Below the requests is a **bell curve chart**, by **Category**. Hover over the labels at the bottom to see a popup with more information about them. Focusing on the **Category labels** at the bottom, you will see that the majority of requests have been **Software** requests (if you look on the left, there have been 4 requests), and very few requests have been submitted for **Phones**.



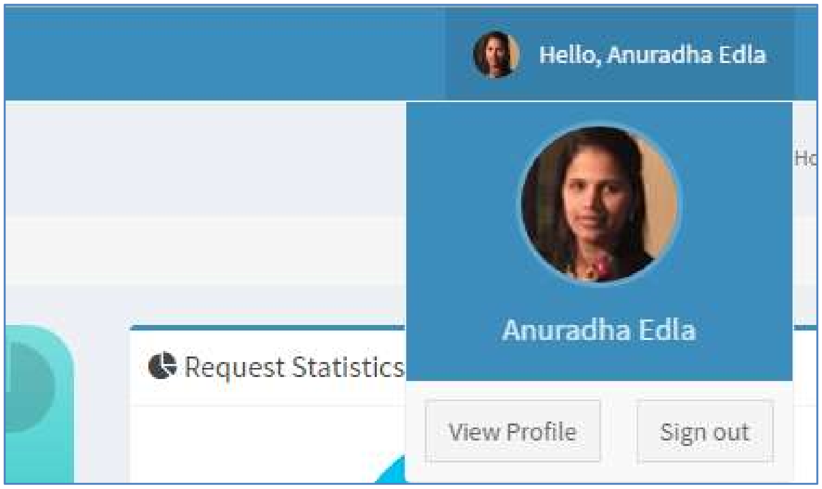
Hide any of the graphs by clicking the minus sign, then clicking the plus sign to redisplay it.

The grid below shows you requests **by Assigned To**. This display quickly lets you know how your staff is doing with regard to the requests assigned to each member. You can quickly assess that **John Lee** has the bulk of the requests assigned to him. This display lets you quickly see who might be overloaded or not have enough work, and you can make any necessary adjustments.

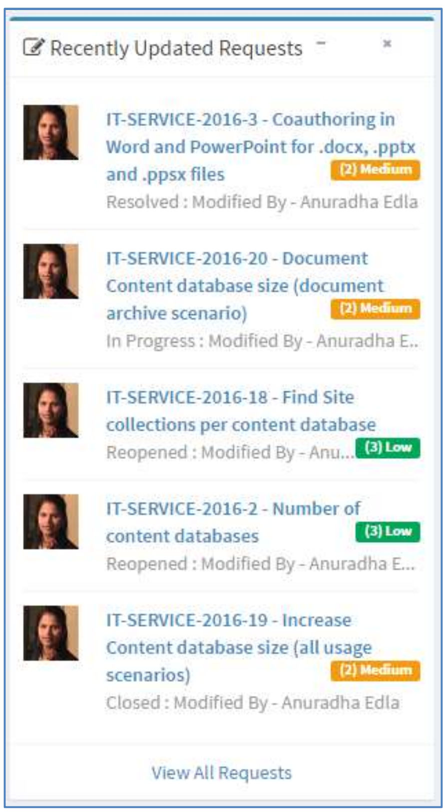
Request Status by Assignee

Assigned To	Open	In Progress	Resolved	Closed	Reopened	Total
Anuradha Edla	0	1	0	0	0	**1**
Veera K	0	2	0	0	0	**2**
Aaradhya Kolan	1	0	0	0	0	**1**
Unassigned	0	0	2	0	0	**2**
Total	**1**	**3**	**2**	**0**	**0**	**6**

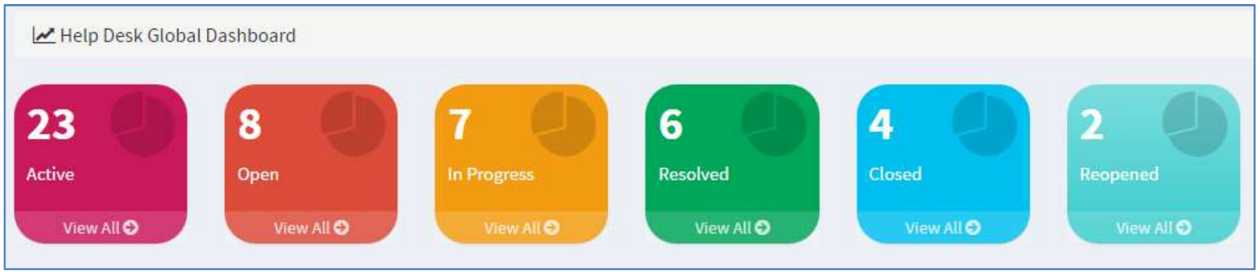
If you want to change your avatar or edit your profile in any way, click on the name, it displays a menu option “View Profile”, click on view profile and a SharePoint profile page will display. Click the **Back** button on your browser to return.



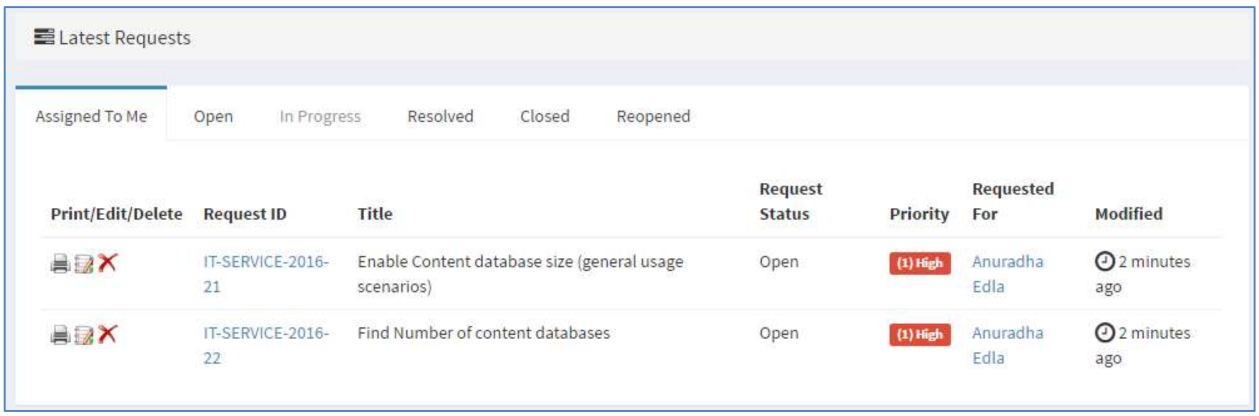
The last area to point out is the **Recently Updated Requests** on the right. These are the 5 most recently updated requests, regardless of Priority or Status.



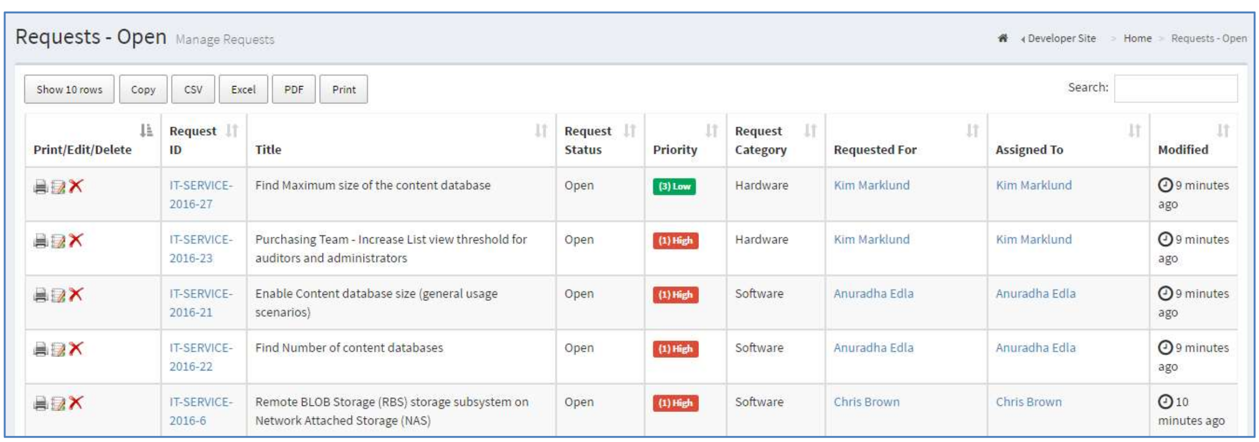
Note that clicking **View All Requests** at the bottom right is the same as clicking the **Active** box at the top left.



The list of requests in the middle is the latest **10 requests**. If you want to view **ALL requests** under a particular Status, click **View All** below it.



The page that displays shows all requests for this Status in a grid layout, sorted by **Modified Date**. Notice the same **Export** options at the top left that we just saw, which shows the consistency in the add-in. There is also a **Search** box at the top right, plus buttons at the bottom right for paging forward and backward.

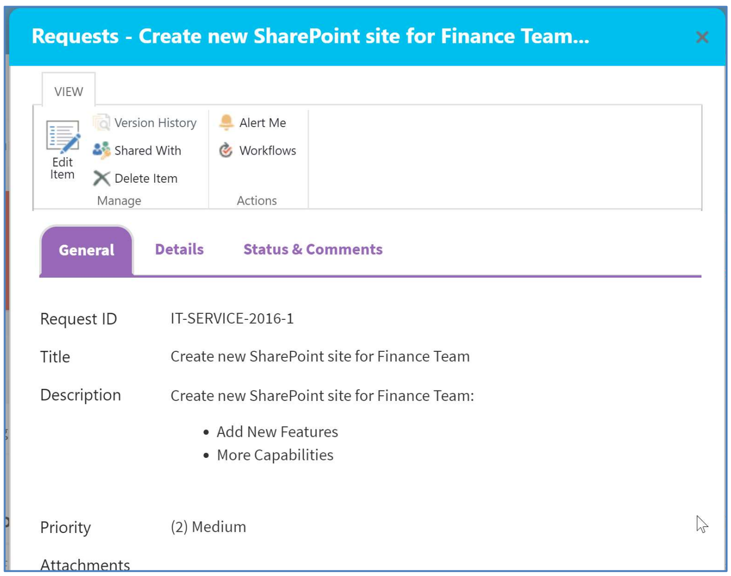


You can change how many rows of data display by clicking the button at the top left. The default is **10**, but you can select **25**, **50**, or **All**.

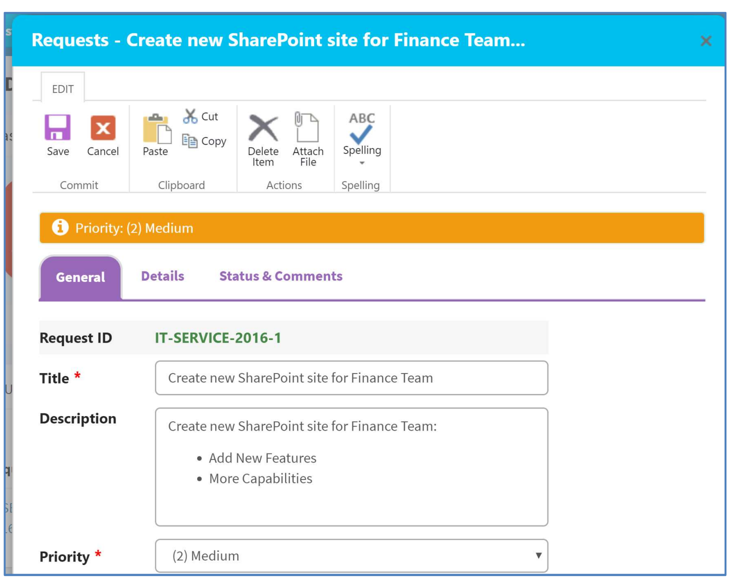
Notice the buttons at the top left. These are for exporting the grid.

- **Copy** copies the table to the Clipboard.
- **CSV** means comma-separated values, and is just the raw, unformatted data
- **Excel** puts the grid in an Excel file, so that you can take advantage of the filtering, and formatting features that Excel provides
- **PDF** exports the grid as a PDF file, and **Print** is for printing the grid

An **Edit** icon is located to the left of each request, which opens a form for the request, already in **Edit** mode. The **Delete** icon deletes the request, right from this screen.



If you click **Request ID**, it takes you to the same form, but you're in **View** mode. You can, however, click **Edit Item** to make a change.

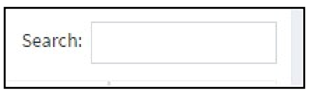


Comments section in the Request form keeps track of requests history logs.

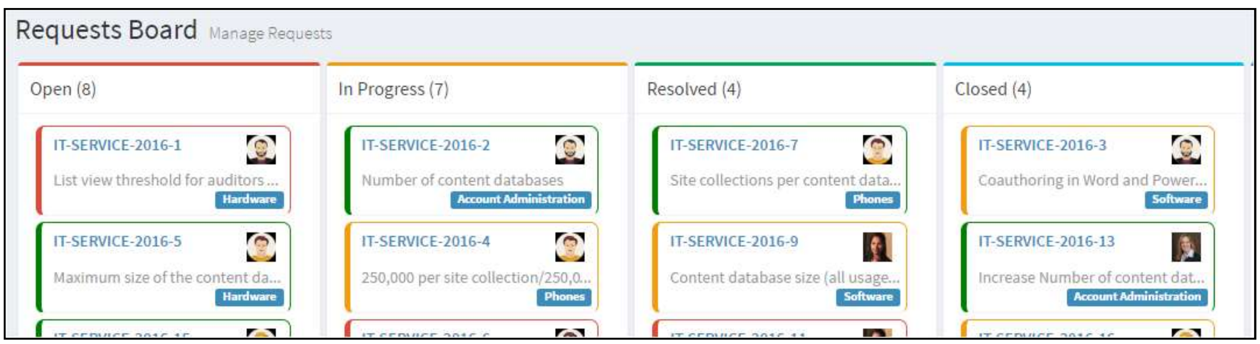
The column headings are sortable. Just click a heading. For example, let's say we want to sort the grid according to **Request Category**, so I'll click that heading. You can refine it further by Ascending or Descending order – just click the icon beside the heading.

There is also a handy **Print** icon next to each line for quick printing of an individual request.

You can search for requests with the Search field at the top right. Enter your search criteria here - just start typing – there is no need to click <Enter>. You can search for any text or number, and the Search looks in all columns.



Requests Board



Click **Requests Board** on the left to see ALL requests in a visual display, **by Status**. Instead of opening an individual request and changing its Status, you can drag and drop for quick editing. Resolving a request is a simple **drag & drop**. Likewise, you can re-open a Closed request with a simple drag & drop. An email notification will be sent to the user each time you change a Status, and the email will include a link to the request.

This board also gives you a quick indication of who has the most requests assigned to them.

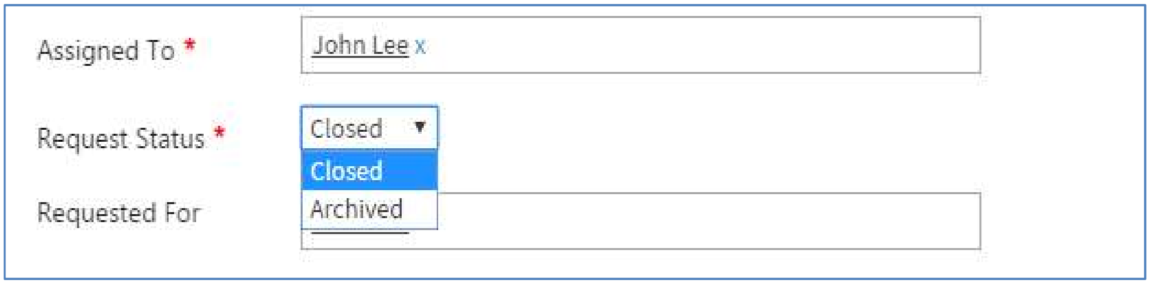
Click the **Request ID** to see the details, or make changes. The same form opens that we saw before.

Archiving Requests

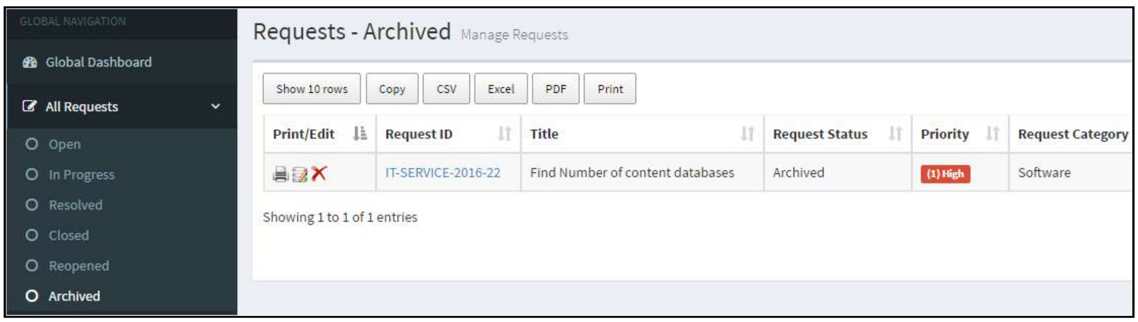
Once a request has been changed to a Status of **Closed**, it can be archived

An Archived option will become available in the **Request Status** field, but only if the request is set to **Closed** (for example, you won't see **Archived** option available if the Status is **Resolved**).

Change the **Request Status** to **Archived**. Keep in mind, once a ticket is Closed or Archived, it CANNOT be reopened. Only **Resolved** tickets can be reopened.

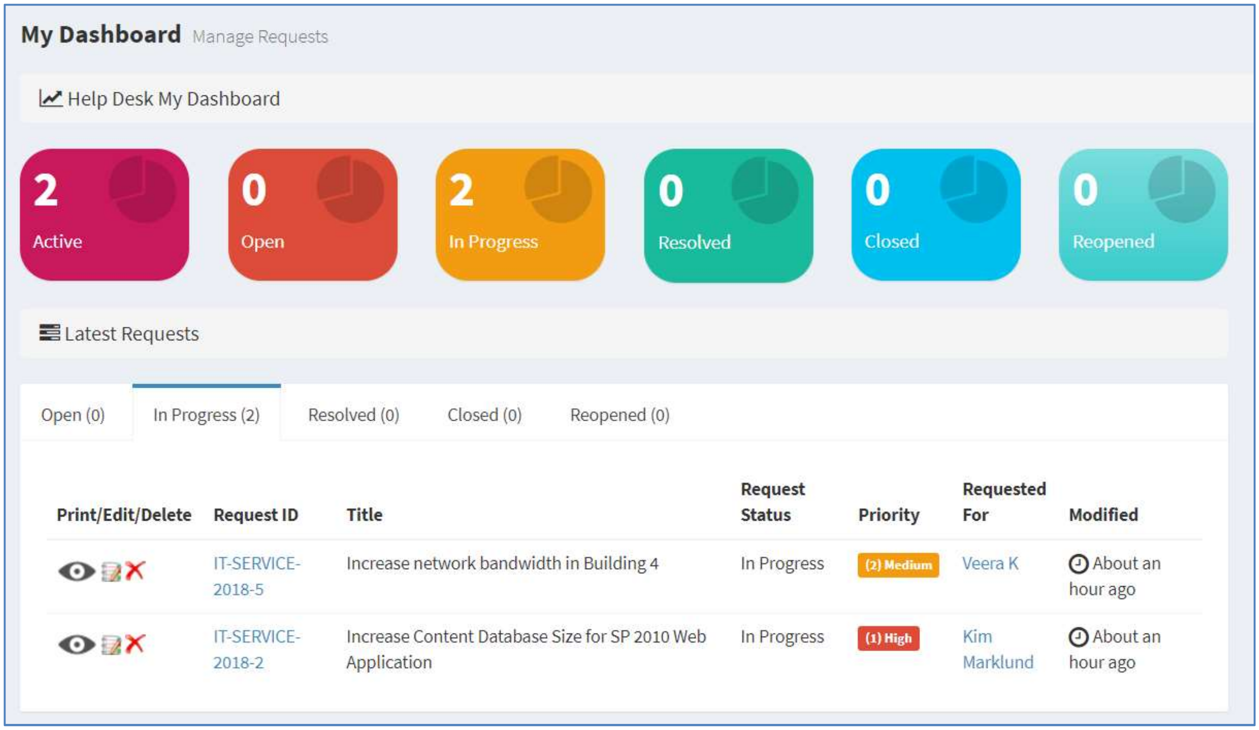


If you want to view the list of Archived requests, click **Archived** in the left navigation.

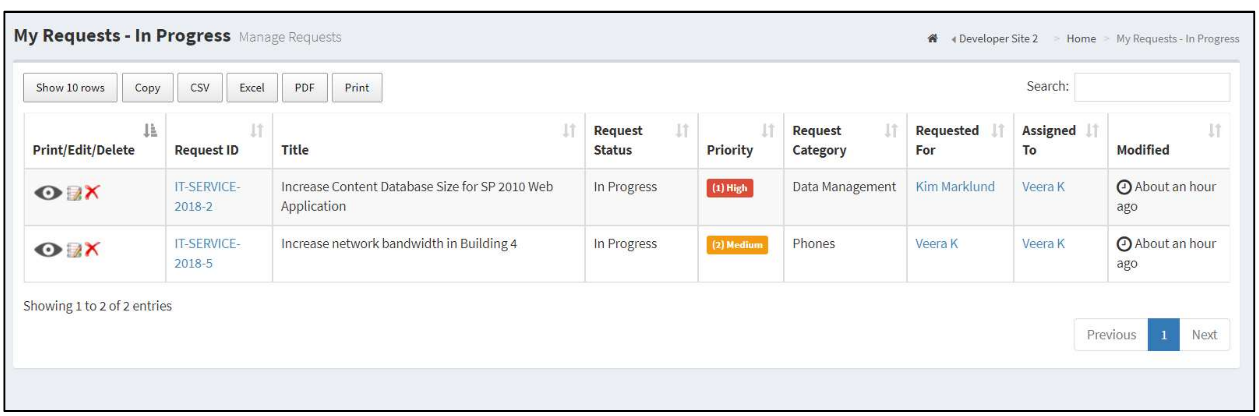


My Dashboard / My Requests / My Requests Board

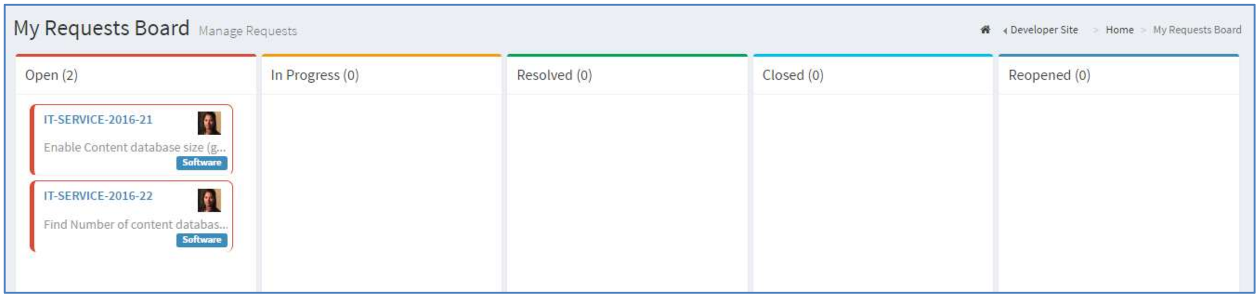
Click **My Dashboard** to see your own individual requests and statistics. The same layout displays as we saw before, with a graph, pie chart, and bar chart, representing the same statistics, so there is a nice consistency.



Click **My Requests**, and then make a selection to see all your requests for a particular Status. Again, the layout is consistent with the one we saw before, only this time it is for your own individual tickets. Click the **Edit** icon to open the form in Edit mode, or click the **Request ID** to see the same form in View mode.

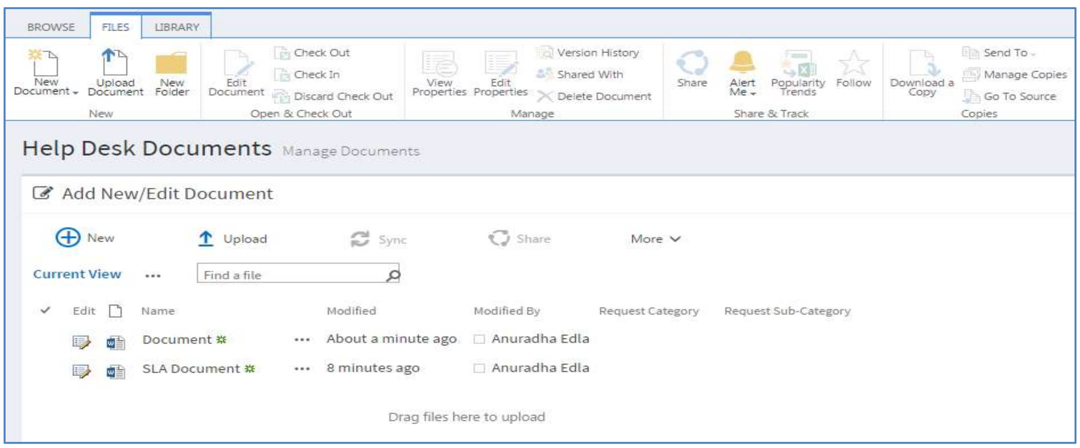


Click **My Requests Board** to see ALL your requests. Here you can **drag & drop** to change Statuses, just as we saw before. Again, an email notification will be sent to the user when you change a Status, with a link to the request.



Document Repository

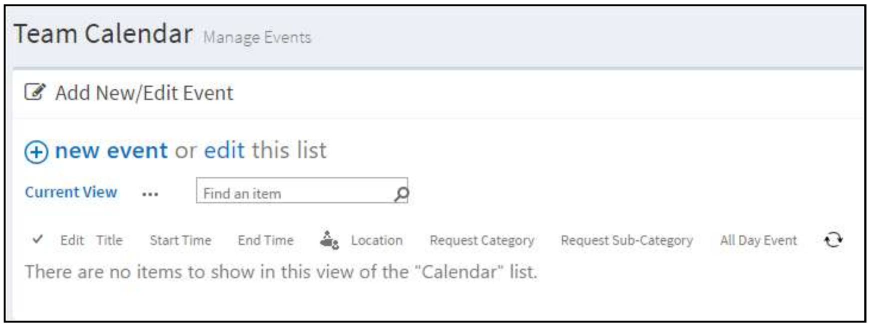
- You can upload & store documents for the Help Desk team to share and use.
- Click **Help Desk Documents**.



- To create a new Word document from where you are right now, click **New**.
- You can upload a document right to this location by using the **Upload** button. Click Choose File, navigation to the file location, click **Open**, and then **OK**. Fill out the fields in the form (required fields are indicated with an asterisk), then click Check In. Now you see your file in the list.
- Instead of clicking **Upload**, you can also drag & drop files from Windows Explorer right onto the page. I'll demonstrate that now: with Windows Explorer open, this is the file I want to upload, so I'll click it, then drag my cursor over the Chronodat Help Desk add-in, then just let go of the mouse. Now you see it in the list. You can see that it's checked out, meaning that it's still in a draft format, and no one else can edit it. If you are ready to check it in, click the ellipses beside it > click it again > **Advanced > Check In**.
- You can create folders, and create or upload documents under them. Just click **New** > **New Folder**.

Using the Team Calendar

- You can maintain a Team calendar in Chronodat. Click **Team Calendar**.



- To add an event to the Calendar, click **New event**.
- You could add a Team social event, system outages, freeze periods in your business (for example, no modifications can be made to any business applications during the December holidays), and so on.
- You can also upload a file to be added as an attachment to the event. You see the attachment only if you click on the event to view it.

You can click **Edit this list** to see a Quick Edit view, for making bulk updates in a spreadsheet-like view.

Security

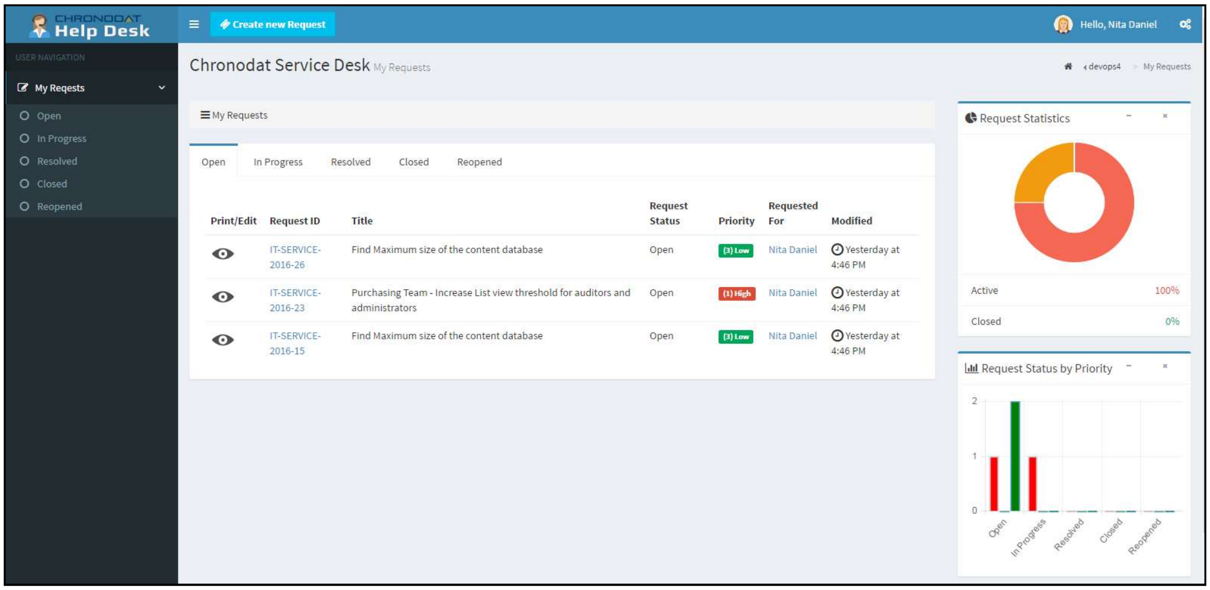
The Chronodat Help Desk add-in contains configurable access levels. Security is maintained by the Chronodat Admin, who can grant access by:

- Creating a **new Security group**
- Using any **existing SharePoint group** in the Parent site
- Creating access for a View-Only user

With the first 2 groups, the Admin can grant the group “Contribute” access (or higher), as well as Dashboard access. The members can **create requests, edit/track requests**, and view the Dashboards. All the functionality seen in this video is accessible.

Full Page UI for Non Support Team (End Users/Requestor)

For the **View-Only user**, this user can track & view their own requests. The Dashboard access is limited, and displays only statistics showing his or her own requests. The screen that the View-Only user works in will have fewer options in the left navigation bar, as shown here:



Dashboard/Home Page (Support Team)