



HarePoint HelpDesk for SharePoint

For SharePoint 2019, SharePoint Server 2016,
SharePoint Server 2013, SharePoint Foundation 2013,
SharePoint Server 2010, SharePoint Foundation 2010

User Guide



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Introduction

HarePoint HelpDesk allows you to create and effectively manage a request processing system for your customers and employees, get accurate and up-to-date information on the number of incoming support requests and support department load, and assess and improve technical support service performance.

HarePoint HelpDesk **implements three roles:**

- **User**
The consumer of technical support services. Users create requests, provide additional details if necessary and assess the quality of provided solutions.
- **Technician**
The specialist of the technical support service. The responsibility of technician includes ensuring an adequate level of technical support service, timely response to requests created by consumers, providing consumers with the most viable options for solving problems described in the request.
- **Viewer**
An additional role (optional), allowing viewing the requests (like a Technician), but not making any changes to them.

A **new request** can be created using any of the following methods:

1. **By e-mail:** When a User sends an e-mail message to the address assigned to HelpDesk, a new request is created. Received messages and all attachments are stored by HarePoint HelpDesk in EML format.
2. **Using the [Technician Console](#):** A technical support specialist can create a request on behalf of a User, for example, when accepting a request by phone. Later, the User can continue working with the request independently via the User Console on a web-site, or by e-mail.
3. **Using the [User Console](#):** the User creates a request for the technical support service by completing a special request form available on the web-site.

User Console

The User Console is designed for sending requests through the web-site to the technical support service. HelpDesk provides a user-friendly and intuitive User Interface through which anyone, even someone who is not familiar with the system, can send a support request without reading a help file or a manual. The request creation form is fully customizable and can be placed on a page of corporate portal or on any site created in SharePoint 2010/2013/2016.

Request Life Cycle from User's Point of View

1. Request creation. User provides all the necessary information for this Request
2. User receives a reply from Technician
3. If necessary, User provides additional information or clarifies the previously provided information.
4. User receives a resolution from Technician.
5. User approves this resolution and Request is closed.

If the issue described in the Request is resolved in step 2, then step 3 is optional.

On the other hand, if additional information is required to resolve the issue, it may be necessary to repeat step 2 and step 3 several times in order to establish an effective dialogue between the User and the Technician to resolve the issue.

Desktop View and Mobile View

All versions of HarePoint HelpDesk include a **Desktop View** for User Console which was designed to be used mostly on desktop computers, notebooks and laptops. The Desktop View of a User Console is described in [this paragraph](#).

Later versions of HarePoint HelpDesk also include a **Mobile View** for User Console that has a special design for convenient viewing and creating requests on mobile devices with touch-screen interface. The Mobile View of a User Console is described in [this paragraph](#).

Note: Mobile View for a User Console is available by a **different link**, other than for a Desktop View – contact your HarePoint HelpDesk Administrator for further details.

Note: All you need to access a Mobile View is just a **browser** on a mobile device. There is no special mobile application needs to be installed on a device for that purpose.

Desktop View User Console

Request Creation

support

HarePoint HelpDesk Web Part

ID	Subject	Product	Status	Created	Commented By
38	List of recipients not found	Not Selected	Open	6/5/2014 6:04 PM	

Create request

Create request

To create a new request or view a list of your own requests and the replies to these requests, use a [link](#) (provided by HelpDesk Administrator) to a page containing the **HarePoint HelpDesk web part**. This web part displays a list of requests. It is possible to **view** your requests as well as to **create a new request** by clicking the **Create request** button. By default, there are such two buttons – **at the top** and **at the bottom** of the list of requests.

Click the **Create request** button to create a new request. The request form will appear. Fill in the form to make a new request.

Note: Request form fields can be customized and extended by HelpDesk Administrators, and thus can be different from the default example below.

While filling in the form, HelpDesk constantly **analyzes the information entered**, and if there are **relevant articles found** in the HelpDesk **Knowledge Base**, links to them will automatically appear. A User can use these links to view articles that might assist in solving the issue, or provide the requested information. In this way, a User may be receive a full answer **immediately** even **without submitting a new request**, reducing the workload on the Support Department.

Please refer to the section [Knowledge Base from User's point of view](#) for details.

HarePoint HelpDesk Web Part

Subject *	<input type="text" value="Running a custom PowerShell script from a workflow"/> Following articles might be helpful: <ul style="list-style-type: none">• This is a first KB Article to be displayed to the users
Priority	<input type="text" value="Low"/>
Category	<input type="text" value="Usage"/>
Product	<input type="text" value="HarePoint Workflow Extensions"/>
Description	<input type="text" value="Hi!
I would be able to accomplish my task if that would be possible to execute a PowerShell script from a workflow.
Does your product provide that functionality?"/>
Attachments	Instructions.txt <input type="checkbox"/> Delete Add attachment

Request Form Fields

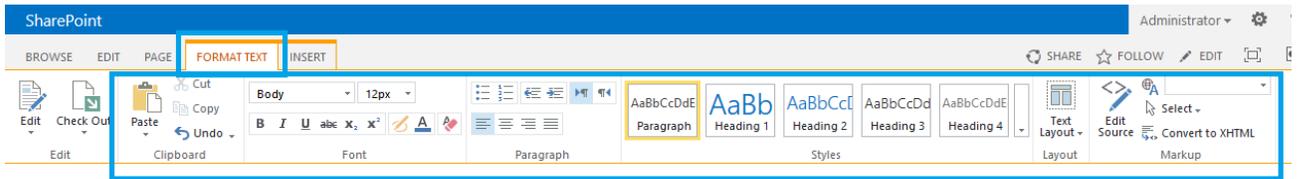
- **Subject**
This field is mandatory. The request Subject is displayed in the list which is viewed by the User and by the Technicians. The field is typically used to provide a short description of the problem.
- **Priority**
The dropdown menu allows you to choose the priority level of the issue associated with your request.
- **Category**
The dropdown or cascaded menu allows you to choose a category (and sub-categories if any) of the issue associated with your request.
- **Product**
The dropdown or cascaded menu allows you to choose a product (and sub-products if any) of the issue associated with your request.

Note: depending on HelpDesk configuration, **Category** and **Product** fields may be **linked** to each other, so that list of displayed **Products** depends on **Category** selected and vice versa.

Note: HelpDesk can be configured to display a **description** for selected **Category** or **Product**, for better understanding of what that stands for.

- **Description**

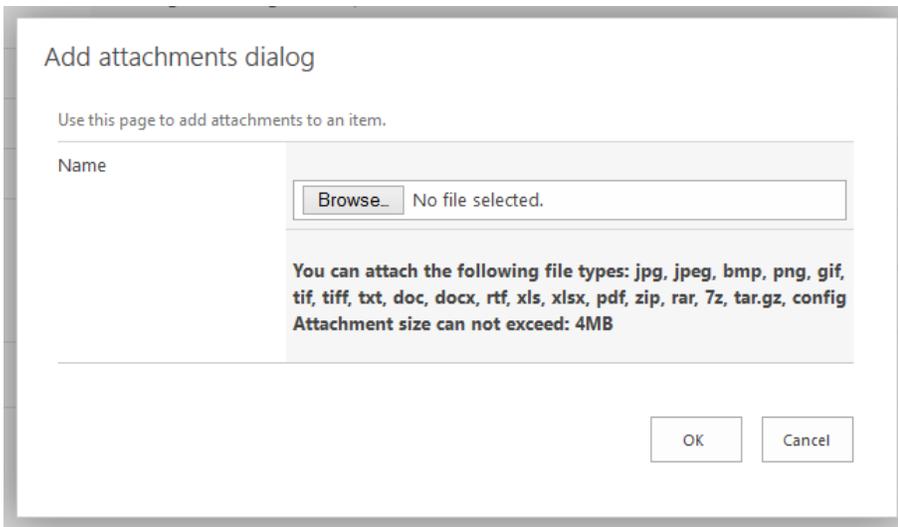
Use this field to enter a detailed description of the issue. You can format your text using the tools in the Format Text tab on the ribbon:



- **Attachments**

The link **Add attachments** is used to add files to the request.

The **list of attachments** added to the request is displayed here, as well as the link to **delete attachments**.



Note: the list of allowed file formats and maximum attachment size limit can be modified in the Product Settings by the HelpDesk Administrator.

support

HarePoint HelpDesk Web Part

ID	Subject	Product	Status	Created	Commented By
39	Running a custom PowerShell script from a workflow	HarePoint Workflow Extensions	Open	6/26/2014 12:24 AM	
38	List of receipients not found	Not Selected	Open	6/5/2014 6:04 PM	

To view a list of your own requests and replies to these requests, open a **link** (provided by the HelpDesk Administrator) to a page containing the **HarePoint HelpDesk web part**.

All requests for the **current** user will appear in the list of requests.

Important note: Users cannot see requests from other users.

Note: the list of requests in the User Console is **not updated automatically**. **Refresh the page** in the browser to be able to see the latest changes in user requests.

Fields in the List of Requests:

Note: The list of Requests can be customized by HelpDesk Administrators, thus can be different from the given example.

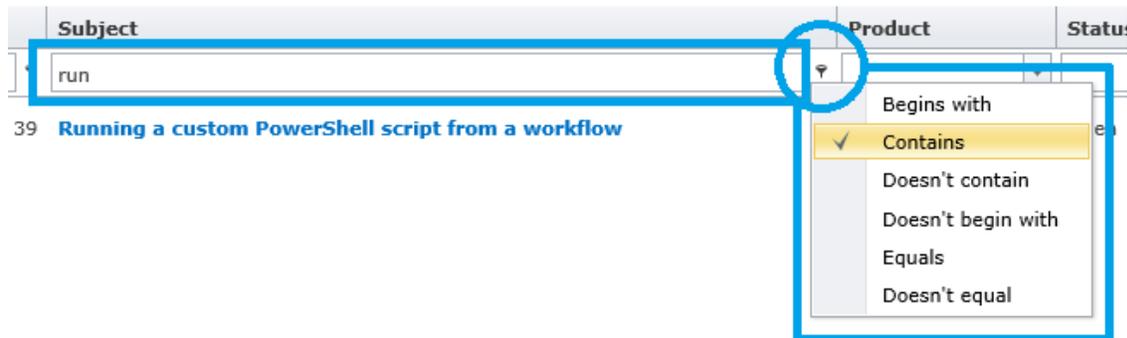
- **ID**
Request Identifier. Incremented and assigned automatically.
- **Subject**
Request Subject specified at the creation of the request. This field is an active link to view the individual request page.
- **Product**
Product specified at the creation of the request.
- **Status**
Request status. By default, the following statuses are available: Open, On Hold, Resolved, Closed
- **Created**
Date and time when the request was created
- **Commented by**

Displays the **name** of the User or Technician whose comment was the latest in the discussion thread of this request.

Users can **adjust the width** of the columns, **change their order** (using drag-and-drop), and select by what column the requests should be **sorted**.

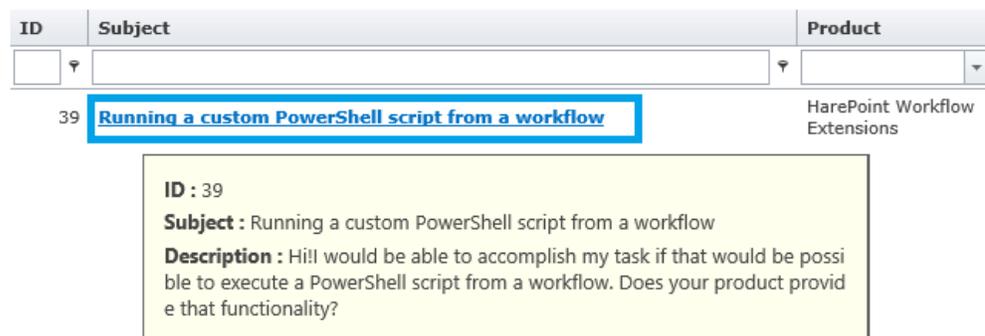
Note: These adjustments are stored by the browser and can be reset inadvertently e.g. by cleaning browser cache.

It is possible to **apply filter** to any of the fields:



The Request can be **previewed** by **hovering the cursor** over the Subject of the request, so the tool tip will pop up:

HarePoint HelpDesk Web Part



[Request Page](#)

You can access this page by clicking on the **Subject** of the required request in **List of Requests**:

10/30/2014 12:25 AM Marked as resolution (Not approved by user) Approve resolution Quote

Feel free to contact us if you have further questions or suggestions!

HarePoint Support Team
www.harepoint.com

■ Technician 1

Technicians can mark their reply as a resolution. After that, the following scenarios are possible:

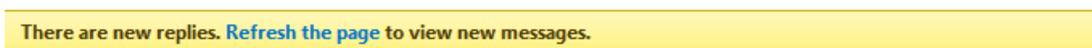
- a) If this is **actually a resolution** for the user, then the user can **approve the resolution**, and request will be **closed** automatically.
- b) If it's **not a resolution** and further assistance is required, the user can simply post a reply, and the status of the request will be changed back to **Open**. This resolution will remain **Not approved by the User**.
- c) If the request remains in the **Resolved** status for **longer than 10 days**, it will be automatically **closed** by the system.
Note: this period can be changed by a HelpDesk Administrator.

- **Close the request**
- **Reopen the request** (may be disabled by Administrator)

When a closed request is **reopened**, a new linked request is created. In this case, it is possible to review older messages in the communication thread by expanding Show Request History:



When a **new message** has been received from a Technician, a yellow bar is displayed below the last message:



Click **Refresh the page**, or push **F5** on the keyboard to refresh the page and see the latest message.

Note: If you have some text entered in the **new message form**, make sure to save it before refreshing the page, otherwise the text will be lost!

Mobile View User Console

Note: Mobile View User Console is only available in **later versions** of HarePoint HelpDesk.

Note: Mobile View for a User Console is available by a **different link**, other than for a Desktop View – contact your HarePoint HelpDesk Administrator for further details.

Note: All you need to access a Mobile View is just a **browser** on a mobile device. There is no special mobile application needs to be installed on a device for that purpose.

Request Creation

Site Pages: Support Mobile

HarePoint HelpDesk Mobile View Web Part

Ticket id: 7	Created: 11/2/2016 4:12 PM
Modified: 11/2/2016 4:19 PM	
 A ticket created from a mobile device This is a first experience!	
Category: General questions Product: HarePoint HelpDesk Support Rep:	
Ticket id: 6	Created: 6/1/2016 10:35 AM
Modified: 11/2/2016 4:08 PM	
 Reply to several tickets at once Let's test this new feature.	
Category: Technical questions Product: HarePoint HelpDesk Support Rep: administrator	
Ticket id: 5	Created: 11/26/2015 10:03 AM
Modified: 11/2/2016 4:09 PM	
 My monitor blinks Hey, it seems like I need a new monitor, can you arrange sth?Andre.	
Category: Technical questions Product: Support Rep: administrator	
Ticket id: 2	Created: 10/9/2015 8:36 AM
Modified: 6/29/2016 10:30 AM	
 Update Is there any update on archiving functionality?	
Category: General questions	



To create a new request or view a list of your own requests, use a **link** (provided by HelpDesk Administrator) to the page containing **HarePoint HelpDesk Mobile View web part**.

To **create a new request**, click  button:

Create request

Subject *

Priority
Low

Category
Technical questions

Product
HarePoint Analytics

Description

SELECT

CREATE CANCEL

Note: Request form fields can be customized and extended by HelpDesk Administrators, and thus can be different from the default example below.

Request Form Fields

- **Subject**
This is a required field. The request Subject is displayed in the list which is viewed by the User and by the Technicians. The field is typically used to provide a short description of the issue.
- **Priority**
The dropdown menu allows you to choose the priority level of the issue associated with your request.
- **Category**
The dropdown menu allows you to choose a category (and sub-categories if any) of the issue associated with your request.
- **Product**

The dropdown menu allows you to choose a product (and sub-products if any of the issue associated with your request

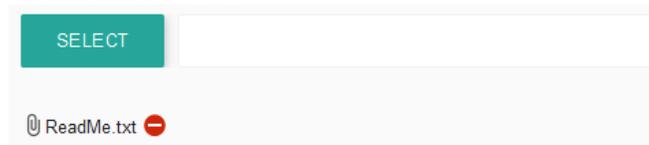
- **Description**

Use this field to enter a detailed description of the issue.

- **Attachments**

The button  is used to attach files to the request.

The **list of attachments** added to the request is displayed below that field, as well as the **link to delete** attachments.



Note: the list of allowed file formats and maximum attachment size limit can be modified in the Product Settings by the HelpDesk Administrator.

Monitoring Your Request Status

List of Requests

Site Pages: Support Mobile

HarePoint HelpDesk Mobile View Web Part

Ticket id: 7	Created: 11/2/2016 4:12 PM
Modified: 11/2/2016 4:19 PM	
 A ticket created from a mobile device This is a first experience!	
Category: General questions Product: HarePoint HelpDesk Support Rep:	
Ticket id: 6	Created: 6/1/2016 10:35 AM
Modified: 11/2/2016 4:08 PM	
 Reply to several tickets at once Let's test this new feature.	
Category: Technical questions Product: HarePoint HelpDesk Support Rep: administrator	
Ticket id: 5	Created: 11/26/2015 10:03 AM
Modified: 11/2/2016 4:09 PM	
 My monitor blinks Hey, it seems like I need a new monitor, can you arrange sth?Andre.	
Category: Technical questions Product: Support Rep: administrator	
Ticket id: 2	Created: 10/9/2015 8:36 AM
Modified: 6/29/2016 10:30 AM	
 Update Is there any update on archiving functionality?	
Category: General questions	



To view a list of your own requests, use a **link** (provided by the HelpDesk Administrator) to the page containing **HarePoint HelpDesk Mobile View web part**.

All requests for the **current** user will appear in the list of requests.

Important note: Users cannot see requests from other users.

Note: the list of requests in the User Console is **not updated automatically**. **Refresh the page** in the browser to be able to see the latest changes in user requests.

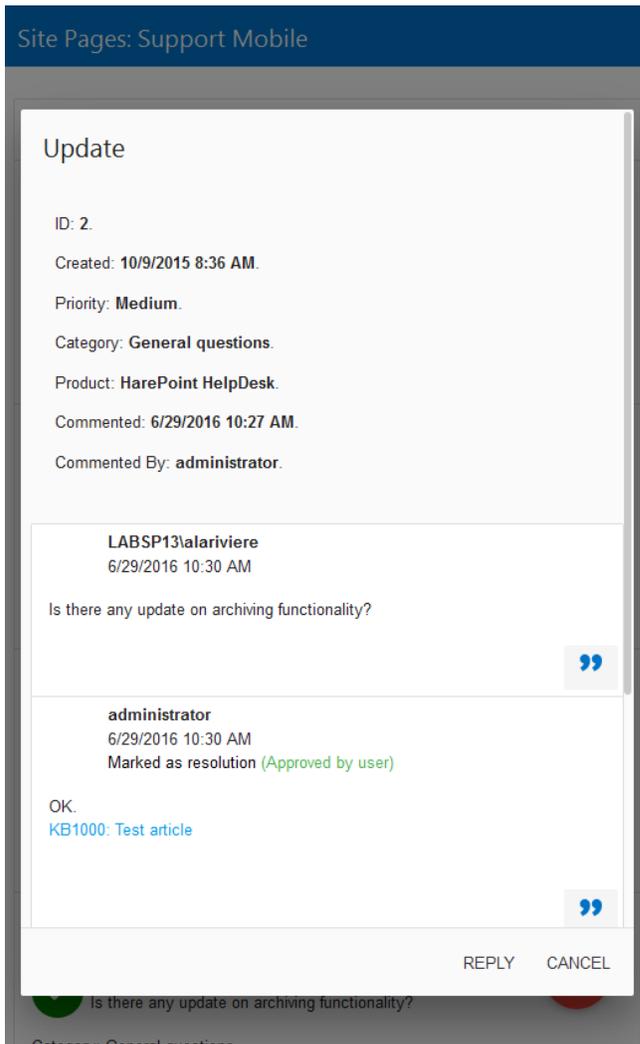
The following information is displayed for each request:

- Request ID
- **Creation Date**
- **Last Modified Date**
- **Subject**
- Preview of request **description**

- Optional: **Category**
- Optional: **Product**
- Optional: **Support team representative** whom this request is assigned to
- Ticket **status** and **priority** icon

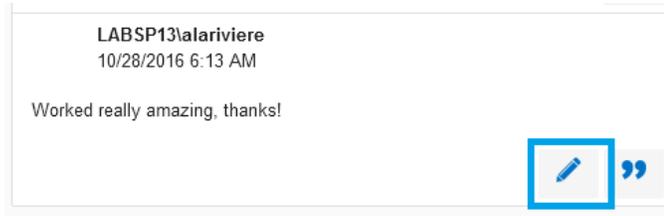
Request Page

Tap on any request in a list to view it:

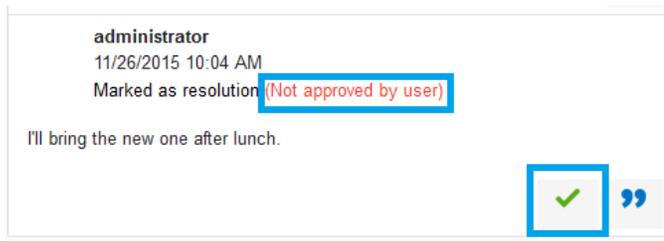


Users can perform the following operations on this page:

- **Edit the latest own reply or the initial message** if it hasn't been commented by Technician yet:



- **Add a new message** for a Technician at any time, even before a Technician has replied
- **Attach and send files**
- **Approve the resolution** provided by the technician:



Technicians can mark their reply as a resolution. After that, the following scenarios are possible:

- If this is **actually a resolution** for the user, then the user can **approve the resolution**, and request will be **closed** automatically.
- If it's **not a resolution** and further assistance is required, the user can simply post a reply, and the status of the request will be changed back to **Open**. This resolution will remain **Not approved by the User**.
- If the request remains in the **Resolved** status for **longer than 10 days**, it will be automatically **closed** by the system.
Note: this period can be changed by a HelpDesk Administrator.

- **Close a request**
- **Reply and reopen a request**

Technician Console

Technician Console is designed for **Technicians**; they can reply and manage requests conveniently, as well as use the additional functionality to simplify the routine work and improve the overall Help Desk Team efficiency.

Besides that, Technician Console is also used by HelpDesk **Viewers**. They can view requests and subscribe to them, but they cannot make any changes.

One can **access the Technician Dashboard** in different ways:

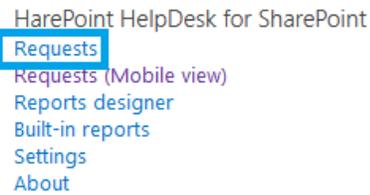
- Click the **Technician Dashboard** icon on HelpDesk main page:



Technician dashboard

or

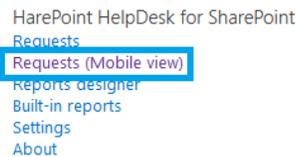
- In SharePoint 2019/2016/2013: click  - Site Settings
- In SharePoint 2010: click  - Site Settings
- In the **HarePoint HelpDesk for SharePoint** section, click **Requests**.



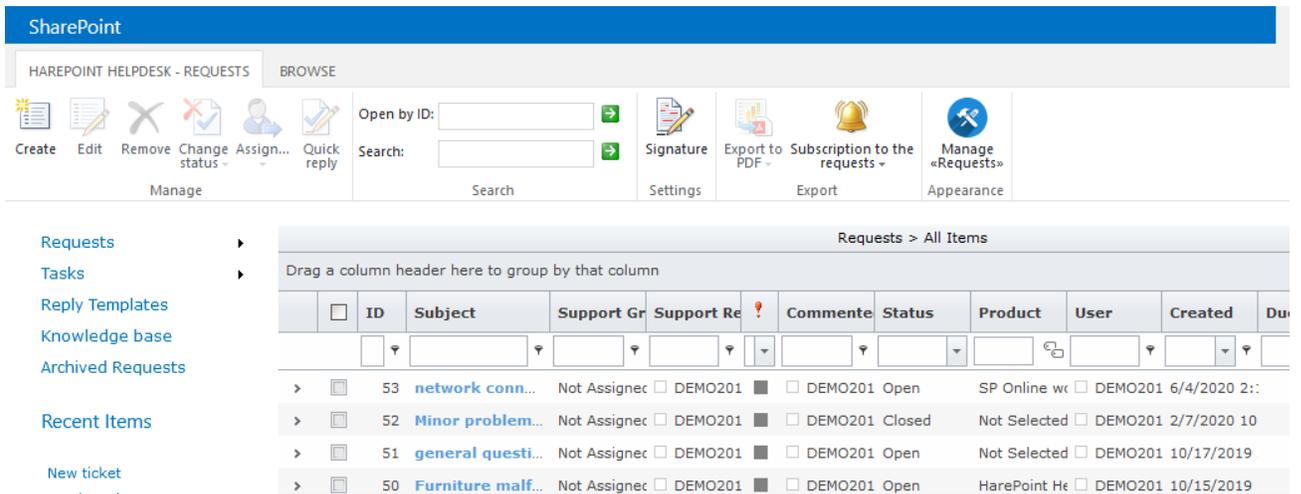
or

- use a direct link to the Technician Console provided by the Administrator.

Note: In later versions of HarePoint HelpDesk, **mobile version** of Technician Dashboard is available. You can access it using the following link:



Detailed description of mobile site interface is available in [Mobile version](#) section.

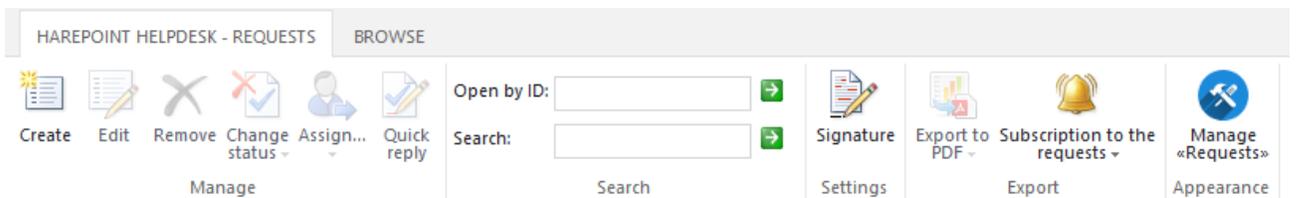


The Technician Console Interface provides the Technician (HelpDesk Operator) and Viewer with information concerning the requests and with quick access to frequently used tools and sources of information.

Important note: The list of requests in the Technician console is **not updated automatically**. Refresh the page in the browser to see the current status of any given view.

Important note: Some of the options are not available for Viewers.

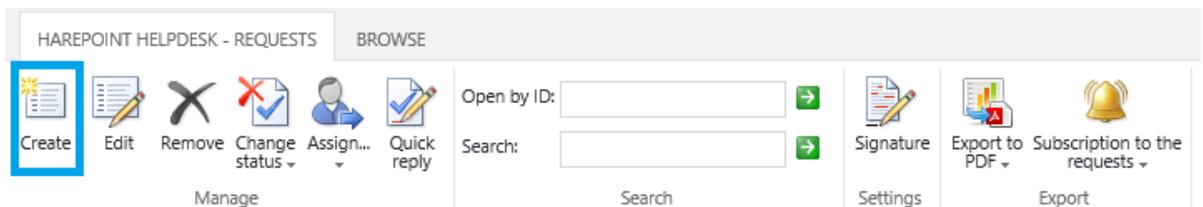
Toolbar



The toolbar provides the Technician with access to frequently used options:

Create

Create a new request.



Used when a phone call or fax is received, the Technician can create a new request on behalf of the user.

Creation of a new request on behalf of the User is more complicated than creation of a new request by the User himself, but provides more options:

HarePoint HelpDesk - New request

EDIT

Save Cancel Paste Copy Attach File

Commit Clipboard Actions

Choose request template: [v]

Request info

Status * Open [v] Level [v]

Product [v] Mode Web Form [v]

Priority Low [v] Category [v]

Owner info

Support Group [v] Support Rep [v]

Contact info

User * [v]

Request activity

DueBy Date [v] 12 AM [v] 00 [v] Response DueBy Time [v] 12 AM [v] 00 [v]

Responded Date [v] 12 AM [v] 00 [v] Completed Date [v] 12 AM [v] 00 [v]

Request

Subject * [v]

Description [v]

Attachments

Additional Fields

Department [v]

OK Cancel

New Request Form Fields

Note: This form can be customized by a HelpDesk Administrator and can contain different fields from the given example.

Choose request template:

(only in later versions; needs to be configured by Administrator)

Administrator can configure templates for frequent requests. When selecting a request template from the drop down list, some of the fields get prepopulated, so you would only need to fill in the missing parts of information.

Request info:

- **Status (required)**
Dropdown list to select Request status.
- **Product**
Dropdown or cascaded menu to choose a product associated with the request.
- **Priority**
Dropdown list to choose priority level of the request.
- **Level**

Dropdown list to choose the appropriate request level. This level is used to determine the minimum required qualification of the technician needed to resolve the issue associated with the request.
- **Mode**
Dropdown list to specify in which way the request was received. The following modes are available: API, e-mail, Phone Call, Twitter, Web Form.
- **Category**
Dropdown or cascaded menu to choose the category of the request.

Note: depending on HelpDesk configuration, **Category** and **Product** fields may be **linked** to each other, so that list of displayed **Products** depends on **Category** selected and vice versa.

Note: HelpDesk can be configured to display a **description** for selected **Category** or **Product**, for better understanding of what that stands for.

Owner info:

- **Support Rep**
Specify the technician to be assigned to the request.
- **Support Group**
Specify the group of technicians to be assigned to the request.

Contact info:

- **User (required)**
Specify the user on behalf of whom the request will be created.

Request activity:

- **Due by Date**
- **Responded Date**
- **Response Due by Date**
- **Completed Date**

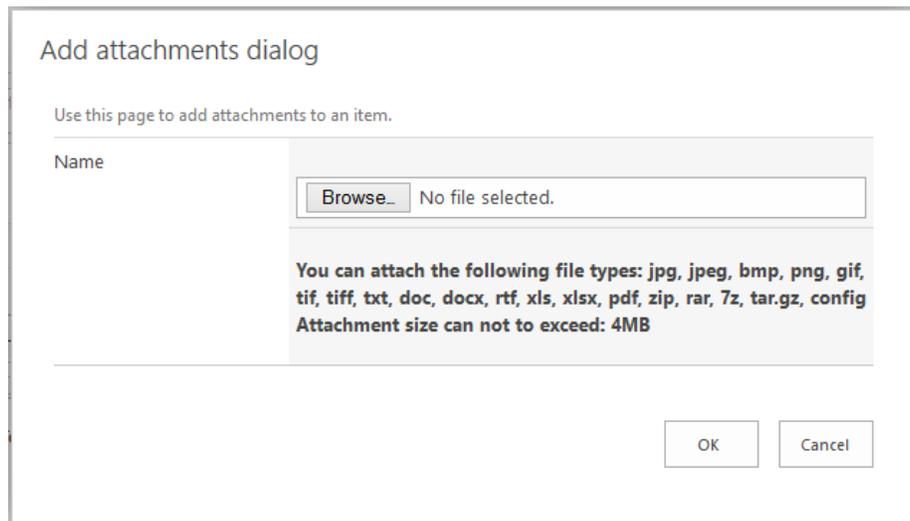
Note: these dates are typically **calculated automatically** based on **SLA (Service Level Agreement) rules** that are managed by HelpDesk Administrator. If values are entered, they can possibly be lost and replaced by automatically calculated values. Consult your HelpDesk Administrator to determine whether you can enter values manually in these fields according to your HelpDesk configuration.

Request:

- **Subject (required)**
Request Subject is displayed in a list which can be viewed both by the User and the Technician. The field is typically used to provide a short description of the problem.
- **Description**
Use this field to enter text. You can format your text with the Editing Tools. The field is used to provide a detailed description of the issue.
- **Attachments**
Use the **Attach File** button on the toolbar (ribbon) to attach files to the request:



The *Attach File* button allows you to choose a **single file** from the computer to be attached to the message. It is possible to attach multiple files at once.



Note: The allowed file types, as well as the maximum allowed file size for each attachment are managed by the HelpDesk Administrator.

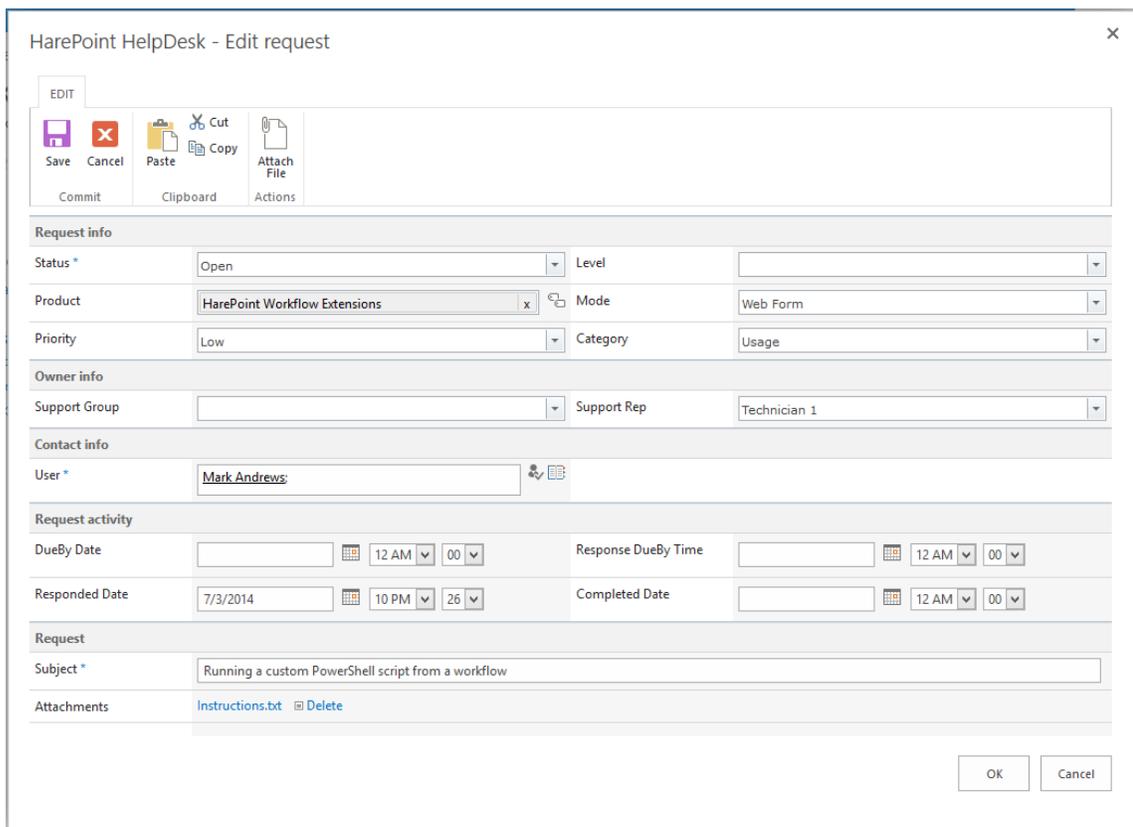
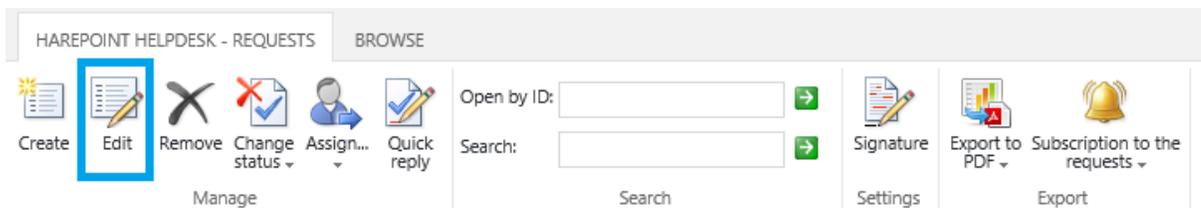
The **Attachments** field becomes visible when there are files attached. This field contains a list of attached files, as well as links to delete them:



When all the necessary information is entered, click the **OK** button to submit a new request in the system. Alternatively, you can cancel this request with the **Cancel** button. In this case, the new request will **not** be submitted and all entered information will be permanently lost.

Edit

Edit the selected request. The button is only available when **one** request is marked in the list of requests with a checkbox, or when viewing a request.



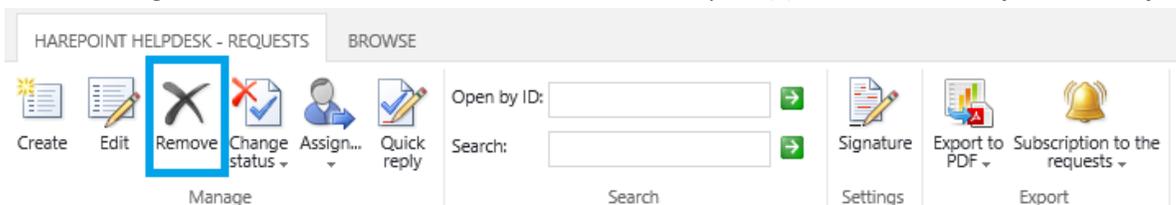
The **Edit Request** dialog is similar to the [New Request dialog](#), except that the **Description** field is not displayed. However, if you need to edit the Description (the initial user message), you can **open** this request and then click **Edit Message** button in the top right corner of the message frame:



Remove

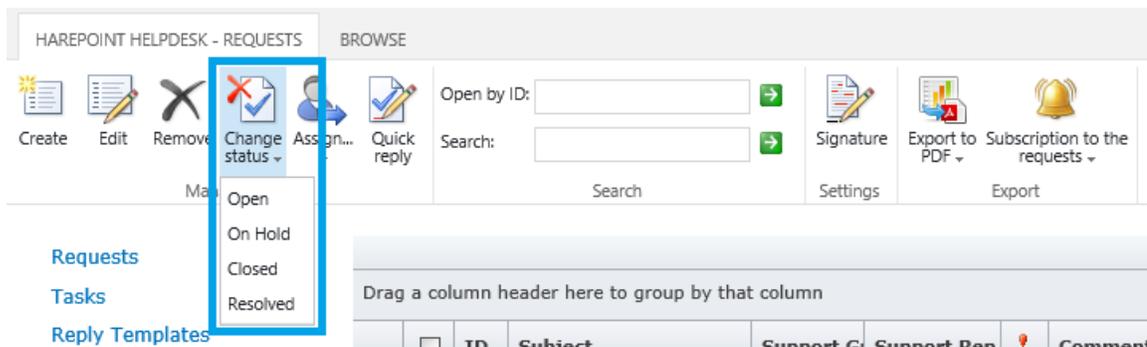
This button is only available when **one or more** requests are marked in the list of requests with a checkbox, or when viewing a request.

A warning will ask for confirmation, and the selected request(s) will be **removed permanently!**



Change status

The button is only available when **one or more** requests are marked in the list of requests with a checkbox, or when viewing a request.

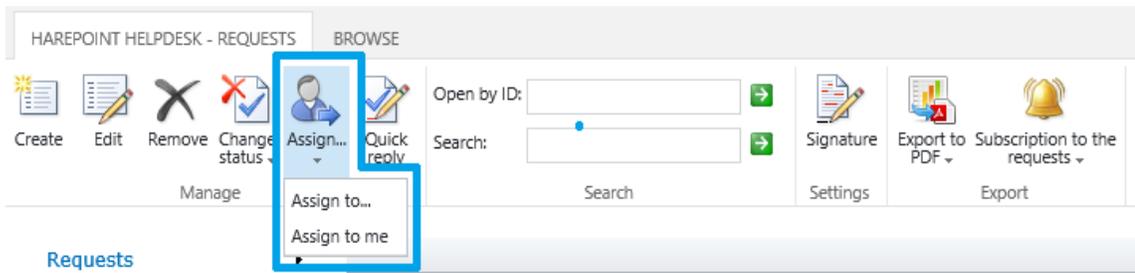


This dropdown list allows you to choose a new status for the request.

Note: The list of statuses can be customized by HelpDesk Administrators, thus it can be different from the given example.

Assign...

This button is only available when **one or more** requests are marked in the list of requests with a checkbox, or when viewing a request.



The **'Assign to...'** option opens a dialog box where you can specify technician or group of technicians to whom the selected requests will be assigned:



The **'Assign to me'** option assigns the selected request(s) to the current technician.

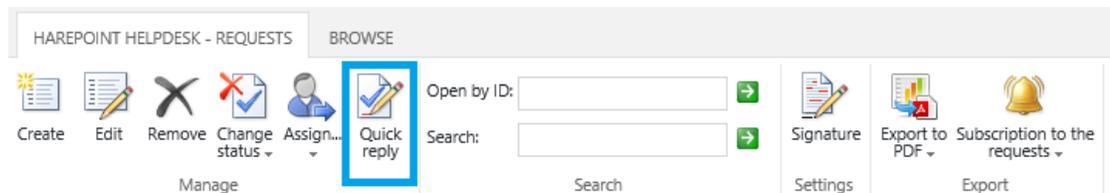
Note: Requests can also be **assigned automatically** to technicians or a group of technicians **at the moment of request creation** based on the Category or Product selected. This operation depends on HelpDesk settings and is managed by the HelpDesk Administrator.

Changing Product or Category afterwards does **not** trigger automatic re-assignment.

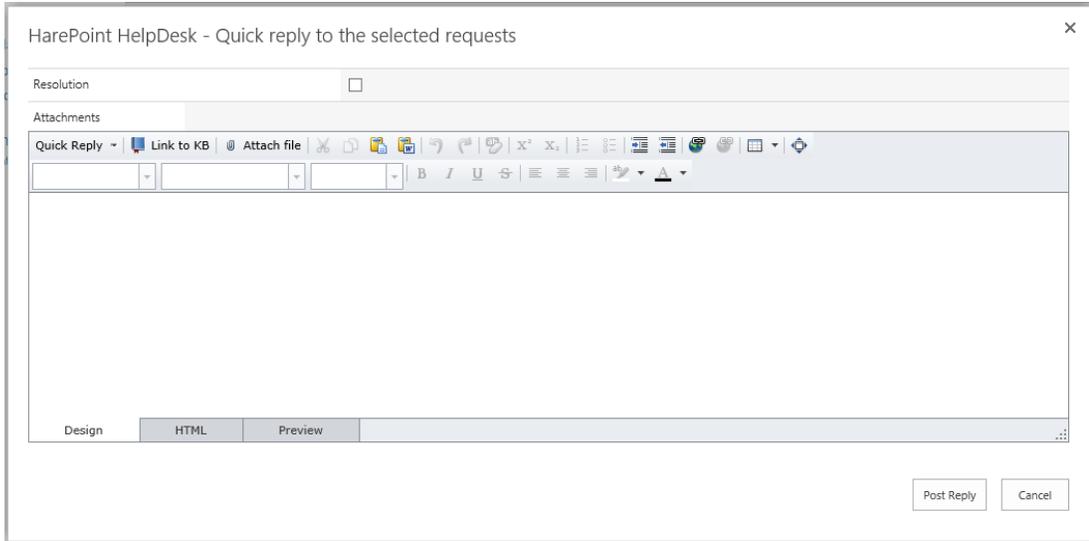
In case if **both** Category and Product auto-assignments trigger, the Product-based auto-assignment will prevail. This behavior can be changed by the HelpDesk Administrator.

Quick reply

This button is only available when **several** requests are marked in the list of requests with a checkbox.

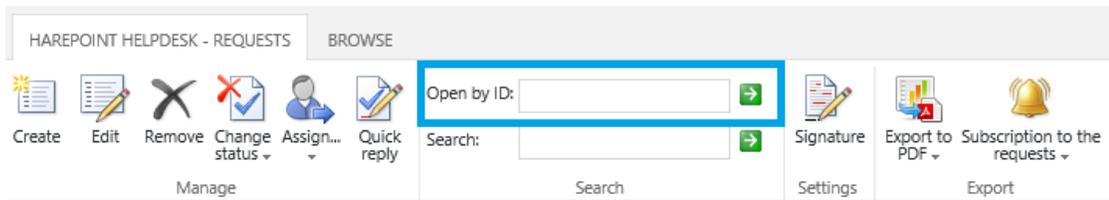


This option allows you to reply to all selected (multiple) requests with the same message:



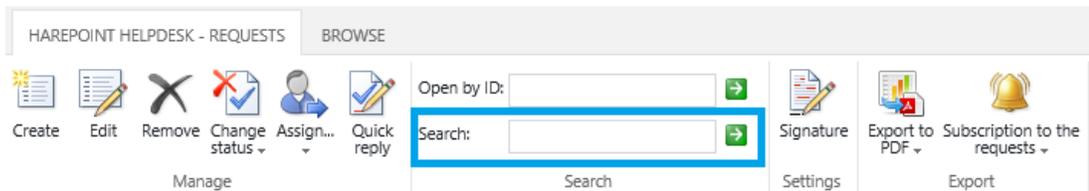
Open by ID

This option allows you to find a request by its ID.



By entering a Request ID into this field, you will be redirected straight to the page of this request.

Search



When entering keywords in the **Search** field, a search is initiated to find related items in **Requests'** body and title, as well as to find **Users** with matching names:

Search results for: test

The screenshot shows the search results for the query 'test'. At the top, there is a search bar containing 'test' and a 'Search' button. Below the search bar, there are checkboxes for 'Requests' and 'Users', both of which are checked. A 'Requests' tab is highlighted. The results list two items:

- ID: 2 - Purchase and Licensing** Priority: Low | Status: Open
Currently evaluating your Active Directory Self service product. We have 2 productions fr...
User: [redacted] | Created: 3/28/2012 9:15 PM | Support Rep: [redacted]
- ID: 6 - Report Subscription Error** Priority: Medium | Status: Open
I am attempting to set up automated reports to be sent to specific users in our firm. I...
User: [redacted] | Created: 3/23/2012 6:32 PM | Support Rep: [redacted]

At the bottom of the results, there is a pagination bar showing 'Page 1 of 169 (845 items)' and a 'Users' tab. Below the 'Users' tab, there is a section for 'Sanya Test' with a mobile number of 'N/A' and an email address [redacted], along with a 'View User Requests' link.

How to create a complex search query:

- AND** and **OR** cannot be used! You should use **+** and **<spacebar>** instead of them respectively.
- If you need to find a request that contains **both words not necessarily next to each other**, use **word1+word2**
- If you need to find a request that contains **any of the words**, use **word1 word2**
- If you need to find a request that contains **several words placed together (a phrase or User's full name)**, use **"word1 word2"** (or **"FirstName LastName"**).
- If you need to find **words in certain fields**, you can do it as follows: **Description: word1 word2**. In this example it will find requests with either *word1* or *word2* in *Description* field.

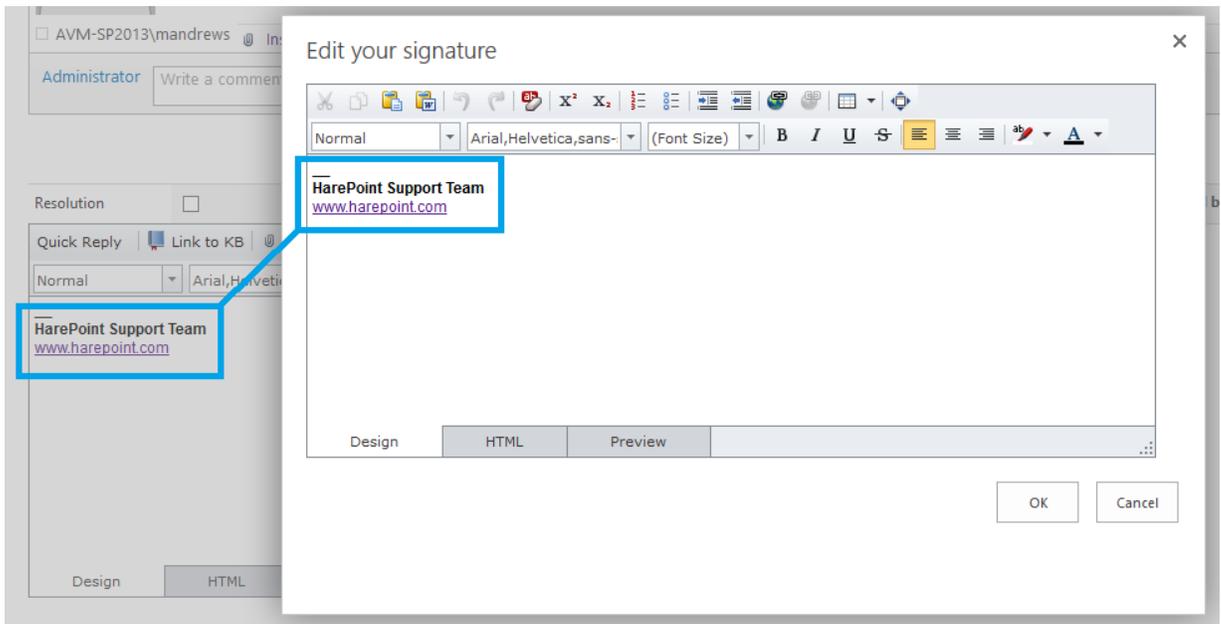
Note: The search is performed only for the **Subject** field, and for **the first message** of the request (**Description** field). All following comments from Technicians or from Users are **not included** in the search. **Internal comments** for Technicians are **not covered** by the search either.

Signature

The screenshot shows the HarePoint Helpdesk interface. At the top, there is a navigation bar with 'HAREPOINT HELPDESK - REQUESTS' and 'BROWSE'. Below the navigation bar, there is a toolbar with several icons: 'Create', 'Edit', 'Remove', 'Change status', 'Assign...', and 'Quick reply'. To the right of the toolbar, there are two input fields: 'Open by ID:' and 'Search:'. Below the 'Search:' field, there is a 'Signature' button, which is highlighted with a blue box. To the right of the 'Signature' button, there are two more buttons: 'Export to PDF' and 'Subscription to the requests'.

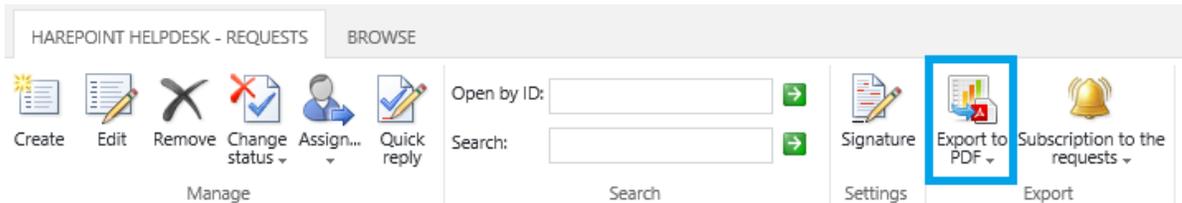
Note: this feature can be disabled by HelpDesk Administrator.

Each Technician can create a **personal signature** that will be automatically added to each reply:



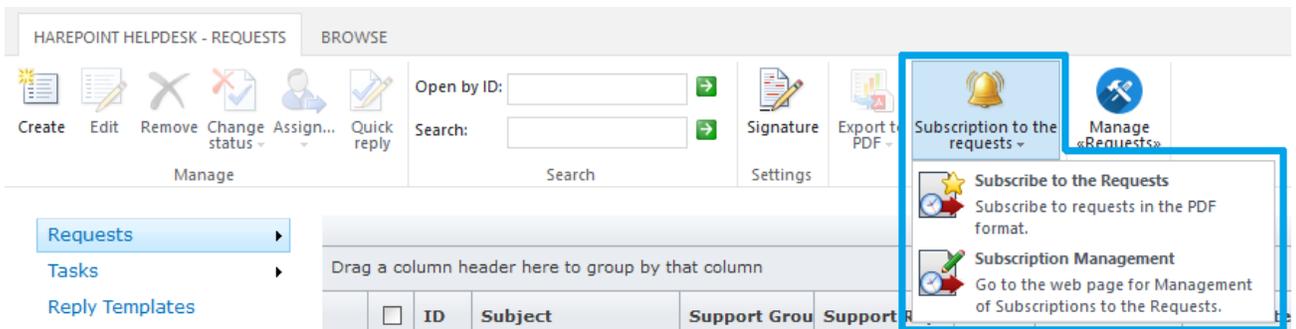
Export to PDF

The button is only available when **one or more** requests are marked in the list of requests with a checkbox, or when viewing a request.

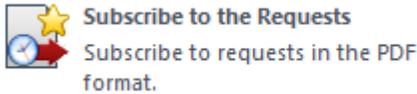


It is possible to export the selected request(s) to PDF in portrait or landscape orientation.

Subscription to the requests



Daily, weekly or monthly subscriptions to **newly created** requests are managed under this button. All requests **created** within the selected period will be sent by e-mail to specified recipients in a specified format:



Add new subscription rule for export

Select recipients
You can enter user names, group names, or e-mail addresses. Separate them with semicolons.

Users/Groups:

Set scheduler for exporting
You can set the schedule to export the requests

Schedule:
 Send requests daily
 Send requests weekly
 Send requests monthly

Time:

Specify the format
You can specify the format of the exported requests

Format:
 PDF
 Portrait
 Landscape

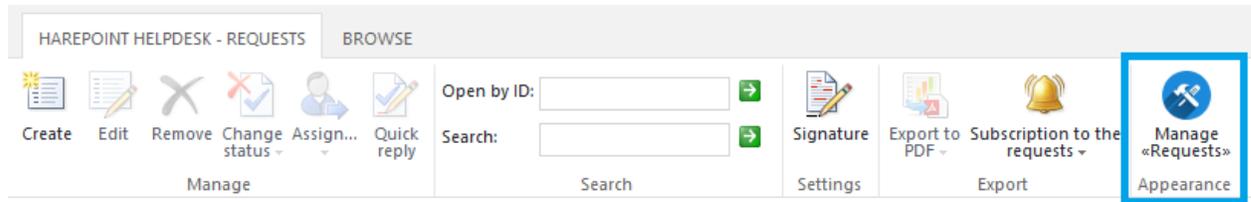
OK Cancel

Important note: only **newly created** requests within the selected period will be included in the exporting! Requests that were created earlier but had new replies within that period will **not** be included!



You can manage subscriptions on **Subscription Management** page.

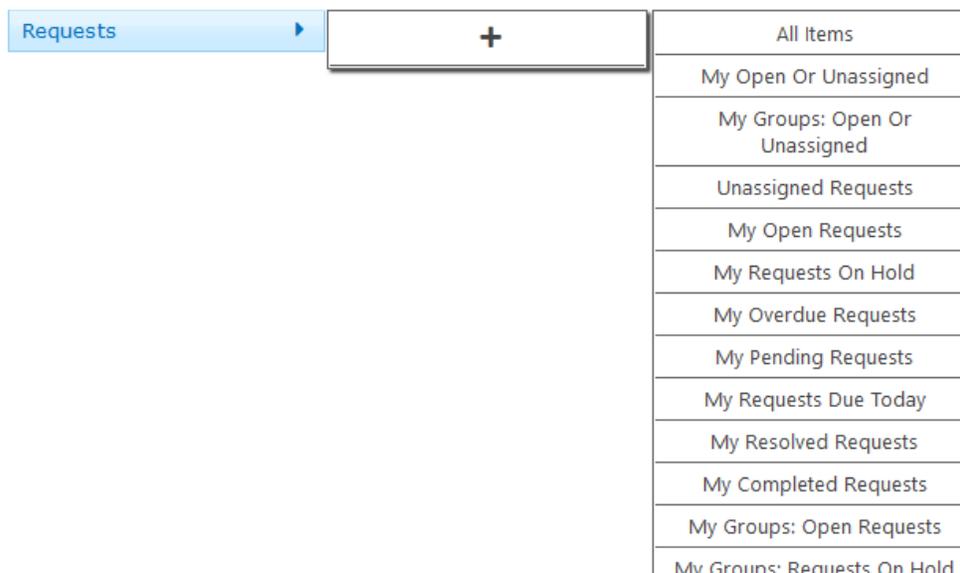
Manage “Requests”



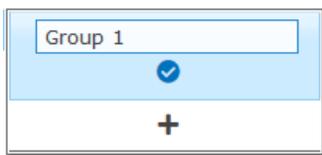
It is possible to create cascaded menus for **Requests** drop-down. (More information on “Requests” menu item can be read [here](#)).

Click **Manage “Requests”** button. By default, this menu has only one level:

HarePoint HelpDesk - Manage «Requests»



Click on “+” sign to add a new group; enter a name for this group:



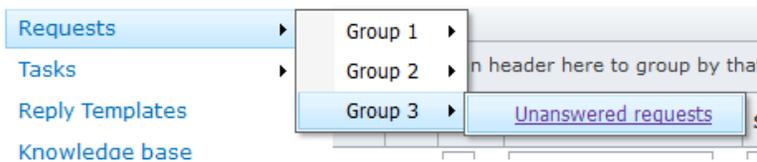
In the right-hand column, click to select which views should be in that column (simply by clicking them):

All Items
My Open Or Unassigned
My Groups: Open Or Unassigned
Unassigned Requests
My Open Requests
My Requests On Hold
My Overdue Requests
My Pending Requests
My Requests Due Today
My Resolved Requests
My Completed Requests
My Groups: Open Requests
My Groups: Requests On Hold

In the same way, you can click “+” sign again to create yet another group and specify which views should be in it, and so on.

Click **Save** when you’ve finished.

Now, **Requests** menu is cascaded, as per your configuration:



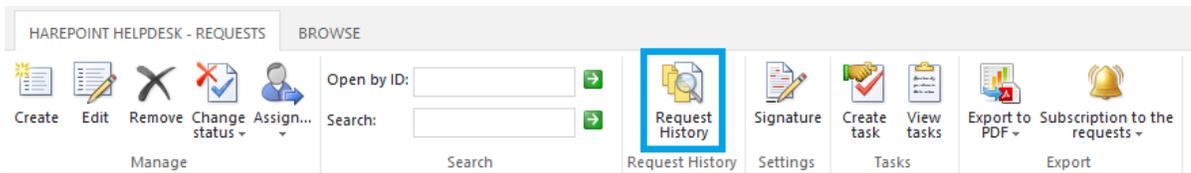
You can **edit** this configuration at any time. Click **Manage “Requests”** button on a ribbon:

- Click on a group to add/remove views from this group (simply by clicking views names in the right column)
- Click  icon to edit a group name
- Click  icon to delete a group

Click **Save** to apply changes.

Request History

This button is displayed on the toolbar (ribbon) **only when viewing a request.**



All changes in the request can be tracked in the **Request History**:
 (in the example below, there are **four** changes to the request).

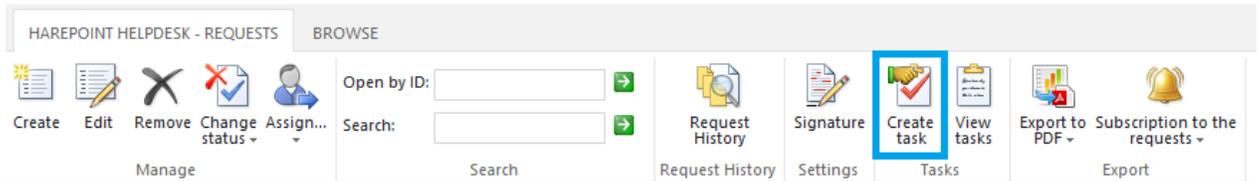
Request History

Delete All Versions

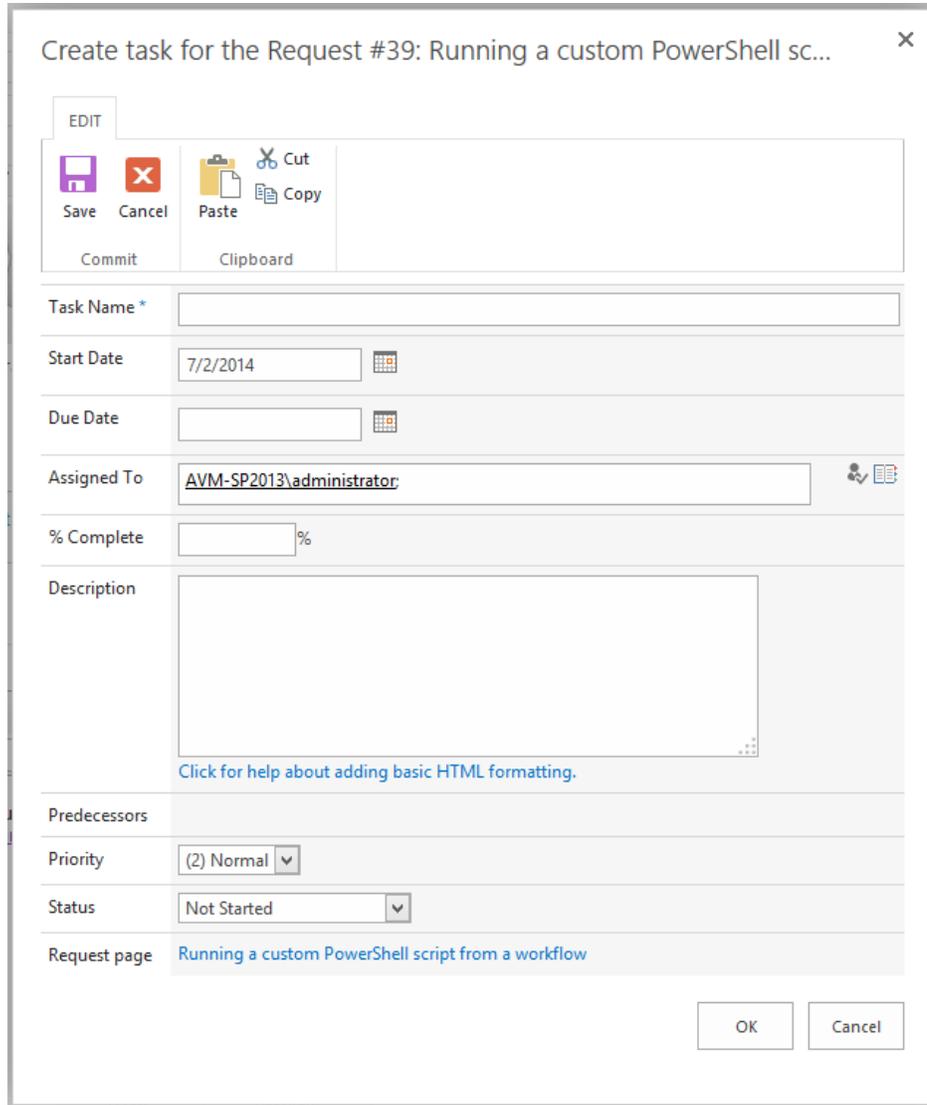
No. ↓	Modified	Modified By
5.0	7/2/2014 5:02 PM	Technician 1
	Status Open	
	Request Opened 7/2/2014 5:02 PM	
4.0	7/2/2014 4:14 PM	Technician 1
	Status On Hold	
3.0	7/1/2014 6:27 PM	Technician 1
	Support Rep ■ Technician 1	
	Responded Date 7/1/2014 6:27 PM	
	Commented By Role Technician	
2.0	6/26/2014 12:48 AM	Technician 1
	User <input type="checkbox"/> Mark Andrews	
1.0	6/26/2014 12:24 AM	Technician 1
	Subject Running a custom PowerShell script from a workflow	
	Status Open	
	Product HarePoint Workflow Extensions	
	Mode Web Form	
	Priority Low	
	User ■ Technician 1	
	Category Usage	
	Description	
	Hi!	
	I would be able to accomplish my task if that would be possible to execute a PowerShell script from a workflow. Does your product provide that functionality?	
	SLA Rule -1	
	Request Opened 6/26/2014 12:24 AM	

Create Task

This button is displayed on the toolbar (ribbon) **only when viewing a request:**



Technician can create one or more **tasks associated with the current request:**

A screenshot of a dialog box titled 'Create task for the Request #39: Running a custom PowerShell sc...'. The dialog box has an 'EDIT' tab and contains the following fields and controls:

- Task Name ***: A text input field.
- Start Date**: A date picker showing '7/2/2014'.
- Due Date**: A date picker.
- Assigned To**: A text input field containing 'AVM-SP2013\administrator'.
- % Complete**: A text input field with a '%' symbol.
- Description**: A large text area with a link below it: 'Click for help about adding basic HTML formatting.'
- Predecessors**: A section for defining task dependencies.
- Priority**: A dropdown menu showing '(2) Normal'.
- Status**: A dropdown menu showing 'Not Started'.
- Request page**: A text input field containing 'Running a custom PowerShell script from a workflow'.

At the bottom right, there are 'OK' and 'Cancel' buttons.

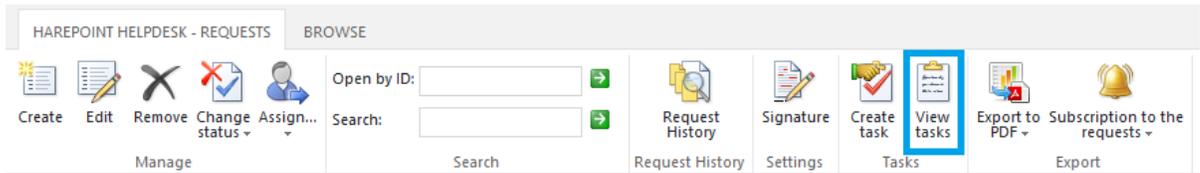
By default, the **current technician** is specified in the **Assigned To** field, but it is possible to specify other technicians.

All assigned persons will receive **e-mail notifications** about the **task creation** and about **any further changes** in the task.

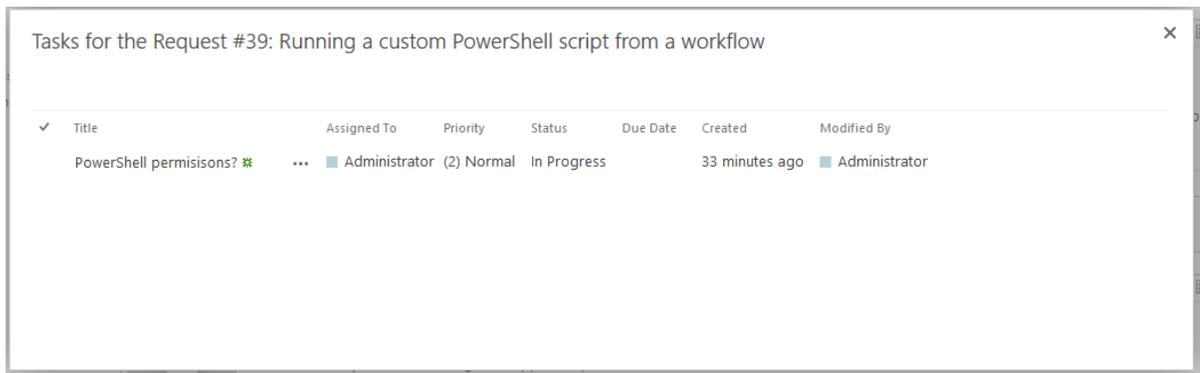
As soon as the task is created, the status of the request changes from **Open** to **On Hold**. When the task is completed, the status of the request changes back to **Open**.

View Tasks

This button is displayed on the toolbar (ribbon) **only when viewing a request**:



Click the **View Tasks** button to see all tasks **associated with this request**:
(in order to view **all other tasks**, use **Tasks** option in the **Menu** – see [Menu - Tasks](#)).



If there are **active tasks associated with this request**, the number of them is indicated on the button:



Note: It is also possible to add a column to the dashboard displaying the number of active tasks for each request – please refer to HarePoint HelpDesk Administrator Guide.

Click on the **Title** of the task to view the information about the task.

Note: Use the **Show More** link (only for SharePoint 2019/2016/2013) to view all the fields:

BROWSE VIEW

Edit Item Manage Version History Shared With Delete Item Alert Me Workflows Actions

Home Site Contents

The content of this item will be sent as an e-mail message to the person or group assigned to the item.

Task Name	PowerShell permissions?
Start Date	7/2/2014
Due Date	
Assigned To	Administrator
% Complete	
Description	Talk to product developer about PowerShell permissions.

[SHOW MORE](#)

Created at 7/2/2014 4:13 PM by Administrator
Last modified at 7/2/2014 4:13 PM by Administrator

Close

Edit tasks

Click **Edit Item** on the ribbon when viewing the task to Edit it.

BROWSE VIEW

Edit Item Manage Version History Shared With Delete Item Alert Me Workflows Actions

The **Edit Task** form will open:

 The content of this item will be sent as an e-mail message to the person or group assigned to the item.

Task Name *

Start Date 

Due Date 

Assigned To

% Complete %

Description

[Click for help about adding basic HTML formatting.](#)

[SHOW MORE](#)

Created at 7/2/2014 4:13 PM by  Technician 1
Last modified at 7/2/2014 5:02 PM by  Technician 1

Save

Cancel

Note: Use the **Show More** link (only for SharePoint 2019/2016/2013) to see all the fields.

Make necessary changes, for example change the status of the task to **Completed** when the task is complete. Click **Save** when done:

Description: Talk to product developer about PowerShell permissions.

Predecessors: PowerShell permissions

Priority: (2) Normal

Status: Completed

Request: Running a custom PowerShell script from a workflow

Contract: [Dropdown]

Company Account: [Dropdown]

Contact: [Dropdown]

Request page: Type the Web address: (Click here to test)
 http://avm-sp2013/HelpDesk_layouts/15/HarePoint/HelpDesk/Req
 Type the description:
 Running a custom PowerShell script from a workflow

Created at 7/2/2014 4:13 PM by Administrator
 Last modified at 7/2/2014 4:13 PM by Administrator

Save Cancel

List of Requests

Requests > Unanswered requests

Drag a column header here to group by that column

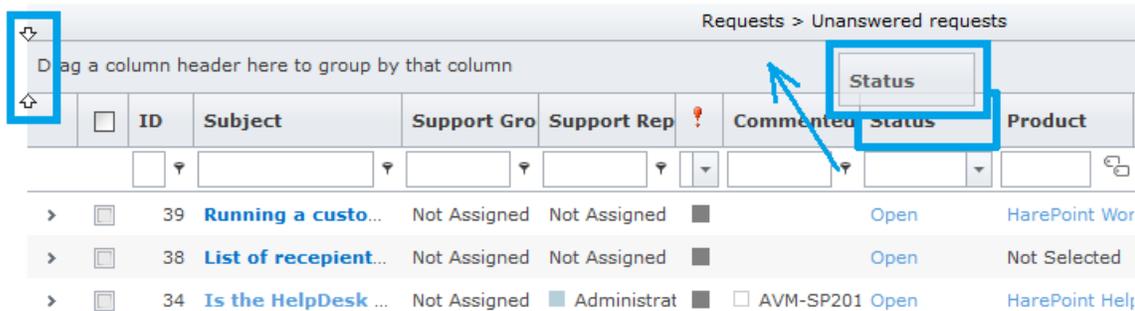
<input type="checkbox"/>	ID	Subject	Support Gro	Support Rep	Commented	Status	Product	User	Created	DueBy Date
>	39	Running a custo...	Not Assigned	Not Assigned		Open	HarePoint Wor	AVM-SP201	6/26/2014 12:	
>	38	List of recepien...	Not Assigned	Not Assigned		Open	Not Selected	Administrat	6/5/2014 6:04	
>	34	Is the HelpDesk ...	Not Assigned	Administrat		Open	HarePoint Helj	AVM-SP201	6/4/2014 11:1	

User requests are displayed in the **List of Requests**. By default, the **Unanswered request** view appears when the page is first loaded, so **only the requests that have not been answered** by Technicians are displayed in the list. Use the **Requests** menu item in the left **Menu** to choose other views (see [Menu - Requests](#) for more details).

Note: The List of Requests can be customized by HelpDesk Administrators, thus can contain different fields and/or have a different default view and other parameters from the given example.

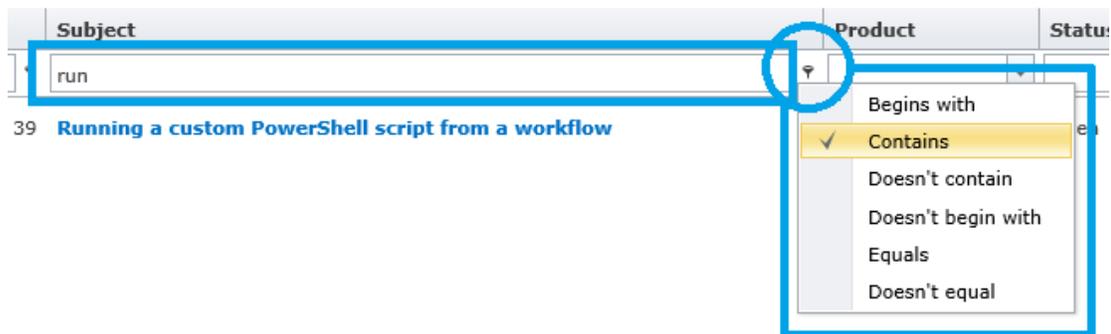
Note: Typically, **Due By Dates** are **calculated automatically** based on **SLA (Service Level Agreement) rules** that are managed by the HelpDesk Administrator.

Technicians and Viewers can **adjust the width** of the columns, **change their order** (using drag-and-drop), select by what column the requests should be **sorted**, and group requests by one or more columns by dragging the column header to the space above the headers:



Note: These adjustments are stored by the browser and can be reset inadvertently e.g. by cleaning browser cache.

It is possible to **apply a filter** for one or more of the fields:



Fields where the filter is applied, are highlighted in yellow and marked with  icon:

Commented By	Status 	Product	User
DEMO2013\administrator	Open	SP Online workflows	DEMO2
DEMO2013\helpdeskuser	Open	HarePoint Analytics	DEMO2
DEMO2013\administrator	Open	HarePoint HelpDesk	DEMO2
DEMO2013\administrator	Open	HarePoint Analytics for S	DEMO2
DEMO2013\administrator	Open	HarePoint HelpDesk	DEMO2
DEMO2013\administrator	Open	HarePoint Analytics for S	DEMO2

Note: filter settings are saved for the given view, and will be applied next time when you open this view.

A request can be previewed in two ways:

- By hovering the cursor over the Subject of the request, so the tool tip will pop up:

	<input type="checkbox"/>	ID	Subject	Support Gro	Support Rep	!	Commented	Status	Product	
>	<input type="checkbox"/>	39	Running a custo...	Not Assigned	Technician		<input type="checkbox"/>	Mark Andre	Open	HarePoint Wor
>	<input type="checkbox"/>	38	List of recep...							cted
>	<input type="checkbox"/>	34	Is the HelpD...							t Help

ID : 39

Subject : Running a custom PowerShell script from a workflow

Description : Hi!! would be able to accomplish my task if that would be possible to execute a PowerShell script from a workflow. Does your product provide that functionality?

- By clicking the icon in the request line:

	<input type="checkbox"/>	ID	Subject	Support Gro	Support Rep	!	Commented	Status	Product	
	<input type="checkbox"/>	39	Running a custo...	Not Assigned	Technician		<input type="checkbox"/>	Mark Andre	Open	HarePoint Wor
>	<input type="checkbox"/>	38	List of receipt...	Not Assigned	Not Assigned			Open	Not Selected	
>	<input type="checkbox"/>	34	Is the HelpDesk ...	Not Assigned	Technician		<input type="checkbox"/>	AVM-SP201	On Hold	HarePoint Help

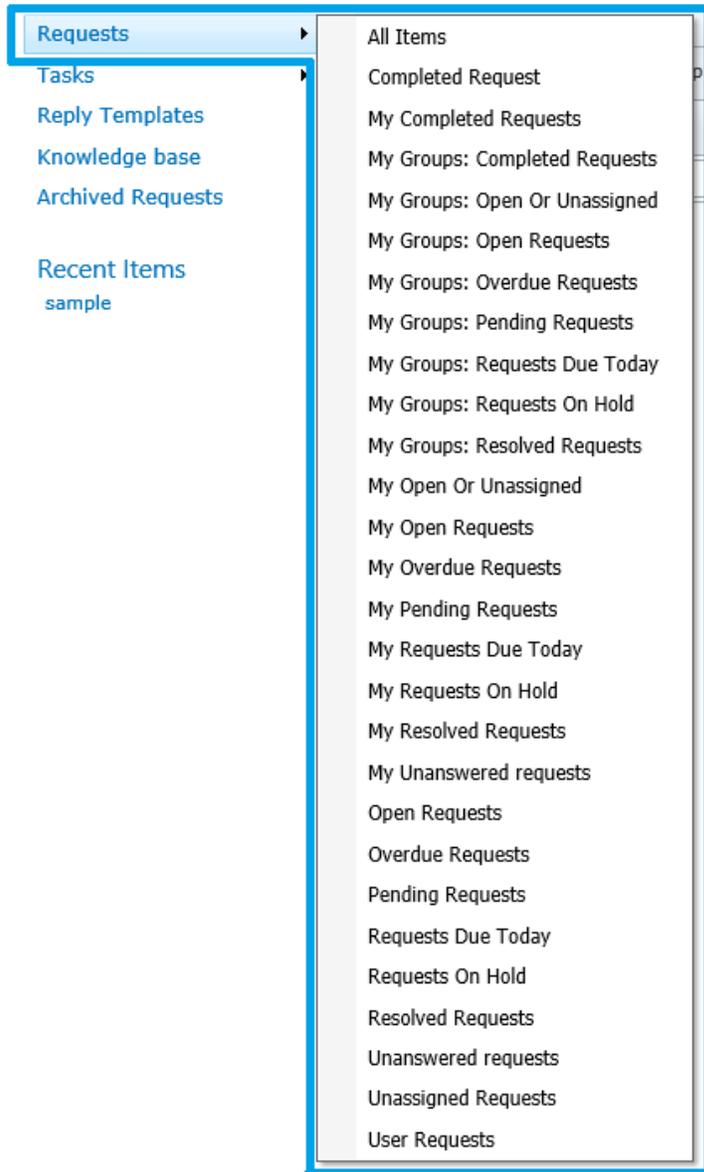
Hit

I would be able to accomplish my task if that would be possible to execute a PowerShell script from a workflow. I

Menu

The Menu in the Technician console contains the following items:

Requests



Dropdown menu items are actually **preset filters (views)** for the list of requests.

Note: these filters (views) can be customized by the HelpDesk Administrator.

It is also possible to create **cascaded view** for requests – the details are described [here](#).

Clicking on **'Requests'** will switch the list to the **default** filter (view) – Unanswered Requests.

Note: You may have **requests archiving** set up by your SharePoint Administrator. In this case, some requests might have already been moved to archive, thus won't appear in the list of requests.

Instead of this, they can be found under **Archived Requests** menu item – see [View archived requests](#) for more information.

The following filters are available by default:

- **All Items**
All requests (without filtering)
- **Completed Request**
Closed requests
- **My Completed Requests**
Requests closed by the current technician
- **My Groups: Completed Requests**
Requests closed by group of technicians that current technician belongs to
- **My Groups: Open or Unassigned**
Open unassigned requests or open and assigned to the group of technicians that current technician belongs to
- **My Groups: Open Requests**
Open requests assigned to the group of technicians that current technician belongs to
- **My Groups: Overdue Requests***
Overdue requests assigned to the group of technicians that current technician belongs to
- **My Groups: Pending Requests**
Requests with *Open* and *On Hold* Statuses assigned to the group of technicians that current technician belongs to
- **My Groups: Requests Due Today***
Requests assigned to the group of technicians that current technician belongs to and response time for which is up today
- **My Groups: Requests On Hold**
On hold (temporarily postponed) requests assigned to the group of technicians that current technician belongs to
- **My Groups: Resolved requests**
Requests marked as resolved and assigned to the group of technicians that current technician belongs to
- **My Open Or Unassigned**
Open requests assigned to the current technician or open unassigned requests
- **My Open Requests**
Open requests assigned to the current technician
- **My Overdue Requests***

Overdue requests assigned to the current technician

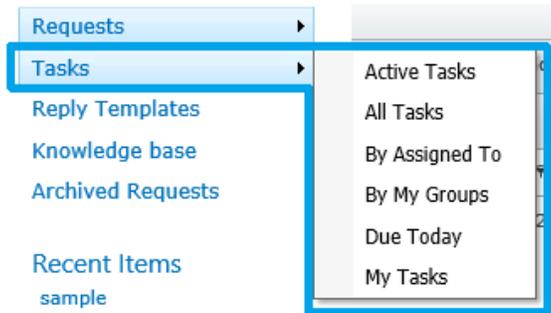
- **My Pending Requests**
Requests with Open and On Hold Statuses assigned to the current technician
- **My Requests Due Today***
Requests assigned to the current technician response time for which is up today
- **My Requests On Hold**
On hold (temporarily postponed) requests assigned to the current technician
- **My Resolved Requests**
Requests marked as resolved and assigned to the current technician
- **My Unanswered Requests**
Open not responded requests assigned to the current user.
- **Open Requests**
All open requests
- **Overdue Requests***
All overdue requests.
- **Pending Requests**
All requests with *Open* and *On Hold* Statuses
- **Requests Due Today***
All requests response time for which is up today
- **Requests On Hold**
All requests that are on hold (temporarily postponed)
- **Resolved Requests**
Requests marked as resolved by any of the technicians
- **Unanswered Requests** (a default view)
All requests that were not answered by any of the technicians
- **Unassigned Requests**
All requests that were not assigned yet

*Typically, **Due dates** are **calculated automatically**, based on **SLA rules** that are managed by the HelpDesk Administrator.

Tasks

Technicians can create tasks associated with the requests. In this case, the request status changes to **On Hold** until all associated tasks are completed and then status changes back to **Open**.

Please refer to the [Create Task](#) and [View Tasks](#) sections for more information on how to create and view tasks for a **specific request**.



By clicking 'Tasks' in the Menu, you can go to the **Tasks list** and view **all tasks** for **all technicians**, or you can select a specific view from the submenu:

Note: these views can be customized by the HelpDesk Administrator, and thus can be different from the default ones.

- **Active Tasks**
Non-completed tasks for all technicians
- **All Tasks**
All tasks for all technicians
- **By Assigned To**
All tasks for all technicians sorted by *Assigned To* field
- **By My Groups**
All tasks for group of technicians that the current technician belongs to, sorted by *Assigned To* field
- **Due Today**
Tasks for all technicians, due date for which is today
- **My Tasks**
All tasks, assigned to the current technician

Note: It is also possible to add a column to the dashboard displaying the number of active tasks for each request – please refer to HarePoint HelpDesk Administrator Guide.

Reply Templates

A link to the list of **Quick Reply** templates.

It is common that certain support issues arise frequently among different users, and technical support specialists have to deal with a large number of very similar requests. Having *Reply Templates* for these situations can simplify the work of technicians and make technical support quicker and more efficient.

Technicians can **view** or **edit** existing Quick Reply templates in the list.
Viewers can **only view** Quick Reply Templates.

To **create a new template**, click **new item** and fill in the form for a **new reply template**:

The screenshot shows a form for creating a new Quick Reply template. It includes the following fields and controls:

- Template Title ***: A text input field.
- Template Body**: A large text area for the template content.
- Category**: A dropdown menu with options: Deployment, Licensing, Usage. To the right are "Add >" and "< Remove" buttons.
- Product**: A dropdown menu with options: HarePoint Analytics, HarePoint Analytics f, HarePoint Analytics f, HarePoint Analytics f, HarePoint HelpDesk, HarePoint Workflow. To the right are "Add >" and "< Remove" buttons.
- Personal**: A checkbox.
- Save** and **Cancel**: Buttons at the bottom right.

Specify the **Template Title** and **Template Body**.

Be sure to specify the **related Categories** and **Products** to simplify finding appropriate reply templates when composing a response to a User.

Check the **Personal** checkbox to make this Quick Reply template visible only for you only; otherwise it will be available for all Technicians.

See [Sections of Request Page - Quick Reply](#) for more details on usage of Quick Reply templates.

Knowledgebase

A link to the list of KnowledgeBase articles.

Users can be provided links to related KnowledgeBase articles either automatically or manually by the Technician – see [Knowledge Base from Technician's point of view](#) for more details.

Documents, texts, and links can be added to the list to facilitate the problem-solving process.

Viewers can also view the Knowledgebase.

Archived requests

A link to archived requests repository (later versions only).

Old or closed requests can be moved to Archive automatically (by schedule) or manually. They can be easily viewed and restored, if necessary.

See [Archived requests](#) section for more details.

Recent Items

This section contains links to recently viewed requests.

Request Page

All Items

↳ Running a custom PowerShell script from a workflow

ID: 39 Priority: Low Status: Open User: Mark Andrews  Support Rep: Technician 1  

6/26/2014 12:24 AM  

 **Hi!**

I would be able to accomplish my task if that would be possible to execute a PowerShell script from a workflow. Does your product provide that functionality?

Mark Andrews  [Instructions.txt](#)

Technician 1 

7/1/2014 6:27 PM  

 **Hello!**

Thank you for contacting our Support Department!

Yes, that is possible with HarePoint Workflow Extensions, you can use **Execute PowerShell script** action for that.

Feel free to contact us if you have further questions or suggestions!

—
HarePoint Support Team
www.harepoint.com

Technician 1 

Resolution

Quick Reply |  Link to KB |  Attach file |                             

Normal | Arial,Helvetica,sans- | (Font Size) | **B** | *I* | U | ~~S~~ |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | 

HarePoint Support Team
www.harepoint.com

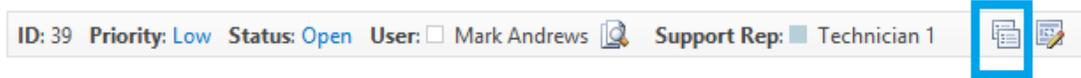
Design | HTML | Preview

The request is being viewed by

Technician 1

Sections of Request Page

- **Information Bar and Request Properties table**



The **Information Bar** provides brief information about the request. In order to view all the details concerning the request, click on the free space on the bar, or use the corresponding button to **expand** the Information bar into the **Request Properties table**.

It can be **collapsed** back to the Information Bar form in the same way.

All fields are clickable, so the technician can get **additional information**, e.g. check other requests from this user, or view other requests for the same product or category.

Request Properties			
Request info			
Status	Open	Level	
Product	HarePoint Workflow Extensions	Mode	Web Form
Priority	Low	Category	Usage
ID	39		
Owner info			
Support Group		Support Rep	Technician 1
Contact info			
User	<input type="checkbox"/> Mark Andrews (View User Requests)		
Request activity			
Created	6/26/2014 12:24 AM by Technician 1	Modified	7/2/2014 5:02 PM by Technician 1
DueBy Date		Response DueBy Time	
Responded Date	7/1/2014 6:27 PM	Completed Date	
Request			

- Messages

6/26/2014 12:24 AM Quote Edit

 Hi!

I would be able to accomplish my task if that would be possible to execute a PowerShell script from a workflow. Does your product provide that functionality?

Mark Andrews  Instructions.txt

Technician 1

7/1/2014 6:27 PM Quote Edit

 Hello!

Thank you for contacting our Support Department!

Yes, that is possible with HarePoint Workflow Extensions, you can use **Execute PowerShell script** action for that.

Technician 1

Feel free to contact us if you have further questions or suggestions!

—
HarePoint Support Team
www.harepoint.com

Technician 1

7/3/2014 10:26 PM Quote Edit

 This is superb! Thanks a lot!

Best regards,
Mark

Mark Andrews

Technician 1

The communication between the User and the Technician is carried out through exchanging messages. Beside text messages, it is also possible to attach files to the request – documents, screenshots, log files or any other files that facilitate solving the issue can be attached.

When a closed request is **reopened**, a new linked request is created. In this case, it is possible to review older messages in the communication thread by clicking the **Show Request History** button:

[Show Request History](#)

When a **new message** has been added from the User or another Technician, a yellow bar is displayed below the last message:

There are new replies. [Refresh the page](#) to view new messages.

Click **Refresh the page**, or push **F5** button on the keyboard to refresh the page and see the latest message.

Note: If you have some text entered in the **new message form** (see next), make sure to save it before refreshing the page, otherwise the text will be lost.

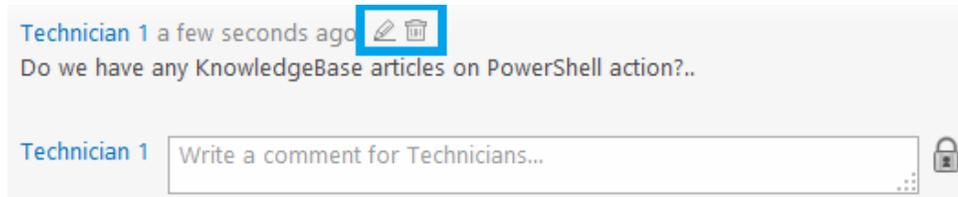
- **Internal comments for Technicians**

Technicians can leave comments or have a discussion visible **only for Technicians and Viewers** (Users cannot see them) right in the request, thus making collaboration among the Support Team extremely efficient. This option is available for each message in the request.

Type a comment and click  :

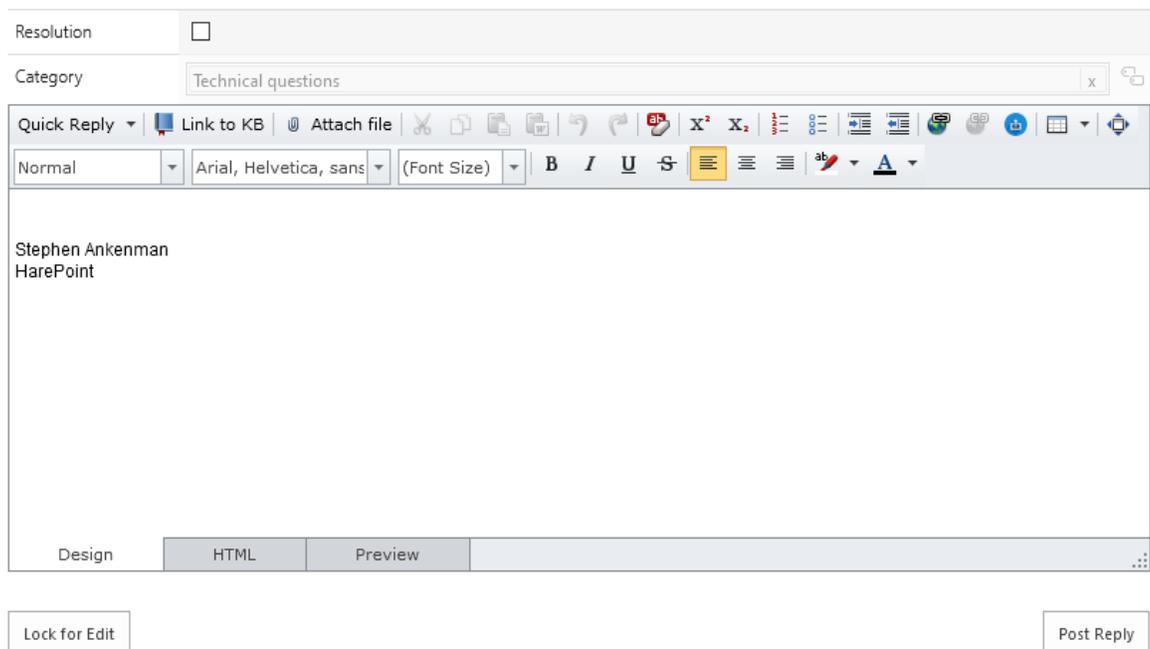


When the comment is added, it can be modified or removed by technician who added it:



An unlimited number of comments can be added for each message in the request.

- **New message form**

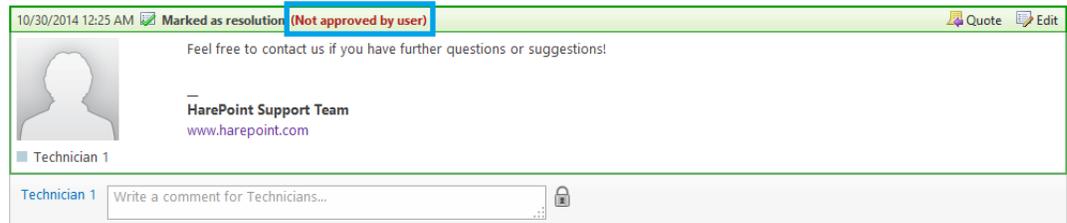


The main part of the Form is a **text field**. HTML text formatting is supported.

The Toolbar of the Form provides access to the following features:

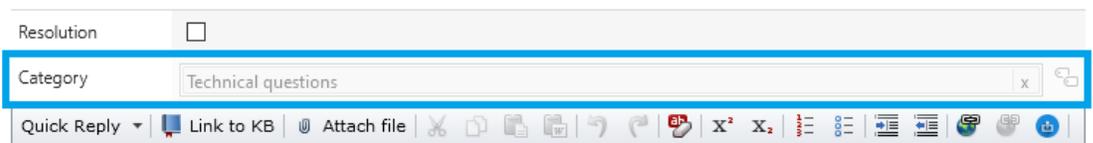
- **Resolution checkbox**

If Technician considers that he is providing a resolution for the User, he can mark the reply as a resolution, so this message will be highlighted with a green frame and the status of the request will be changed to **Resolved**. At first, it will be indicated that Resolution is **not approved by the User**:

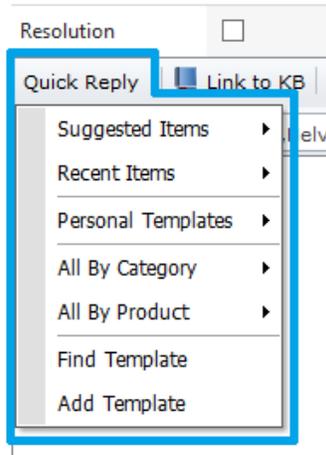


After that, the following scenarios are possible:

- d) If this is **actually a resolution** for the user, then the user can **approve the resolution**, and request will be **closed** automatically.
 - e) If it's **not a resolution** and further assistance is required, the user can simply post a reply, and the status of the request will be changed back to **Open**. This resolution will remain **Not approved by the User**.
 - f) If the request remains in the **Resolved** status **longer than 10 days**, it will be automatically **closed** by the system.
Note: this period can be changed by a HelpDesk Administrator.
- **Quick Category change** (if enabled by a HelpDesk Administrator)
With the Quick Category change, you can change the Category of the request when writing a response, in one action (instead of responding first, and then editing request properties to change the Category)



- **Quick Reply**
The Quick Reply dropdown list allows you to choose the resolution template from the list of [pre-defined Reply Templates](#).



Suggested Items – displays templates that might be useful for the current request, since they are associated with the same Product and Category as the current request.

Recent Items – displays several recently-used templates.

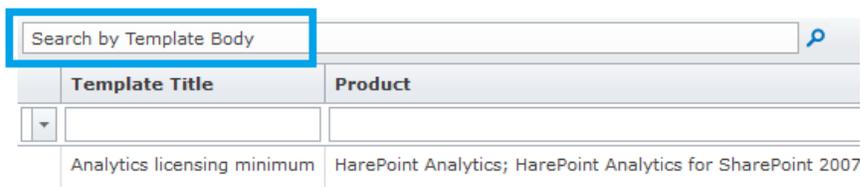
Personal Templates – displays your personal templates only.

All By Category – displays a submenu where you can select a Category and see all related templates to it.

All By Product - displays a submenu where you can select a Product and see all templates related to it.

Find Template – displays a pop-up window with the list of all templates where you can initiate a search by Template Body using the search box at the top of the list:

Reply Templates



Add Template – displays a **new template** form, so you can add a new template immediately.

Refer to [Reply Templates](#) for more details on new template creation.

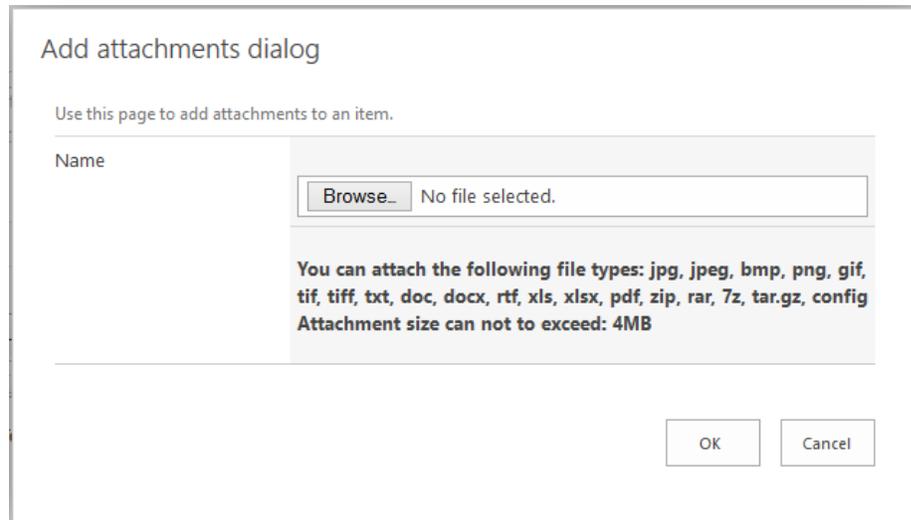
➤ **Link to KB**

Technician can provide user with a link to a related KnowledgeBase article by selecting it in a pop-up window. If necessary, the Technician can use **filtering** or **search** to find necessary article. Refer to [Knowledge Base from Technician's point of view](#) for more information.

➤ **Attach file**

The *Attach file* button allows you to choose one file from the computer to be attached to the message.

It is possible to attach multiple files at once.



Note: The allowed file types, as well as the maximum allowed file size for each attachment are managed by HelpDesk Administrator.

➤ **Upload image** 

It is possible to upload images that will be displayed right in the text field.

Alternatively, you can simply **drag and drop** any image to the text field.

➤ **Text Formatting**

Cut, copy, paste, and paste from Microsoft Word to the message is supported. Bold, italic, underline, strikethrough, superscript, subscript fonts, hyperlinks, alignment, ordered/bullet lists and other tools allow you to make your message look the way you want.

HTML and **preview** modes are also available.

➤ **Lock for Edit**

Use 'Lock for Edit' feature to prevent several technicians from inadvertently working in parallel on the same request (thus wasting time and effort). When the request is locked, other technicians cannot post a message to this request until the technician who locked it either posts his message or manually unlocks the request. Also request unlocks after 2 minute timeout, if technician who locked it has left the ticket (closed request page in a browser).

Each message has a  **Quote** button in the top right corner of the message frame, you can use this button to insert a quote of the specified message into New Message form.

The message is sent upon clicking **Post Reply** button.

- **Informer showing who is currently viewing the request**

The request is being viewed by

- Technician 1
- Mark Andrews

Request can be viewed by the User who created it, and by one or more Technicians or Viewers. The informer is not available in the User Console, so Users cannot see which Technicians or Viewers are viewing the request at the moment.

Note: The informer is **updated automatically** and always displays actual information. No page refreshing is required.

Mobile version

Later versions of HarePoint HelpDesk (16.8 and above) provide a mobile version of the site for Technician Dashboard, which makes it convenient to work with HelpDesk site from smartphones or tabs. It resembles the most of desktop mode Technician Dashboard functionality.

Note: Mobile version of a Technician Dashboard is available by a **different link**, other than for a Desktop one – contact your HarePoint HelpDesk Administrator for further details.

HarePoint HelpDesk for SharePoint
Requests
Requests (Mobile view)
Reports designer
Built-in reports
Settings
About

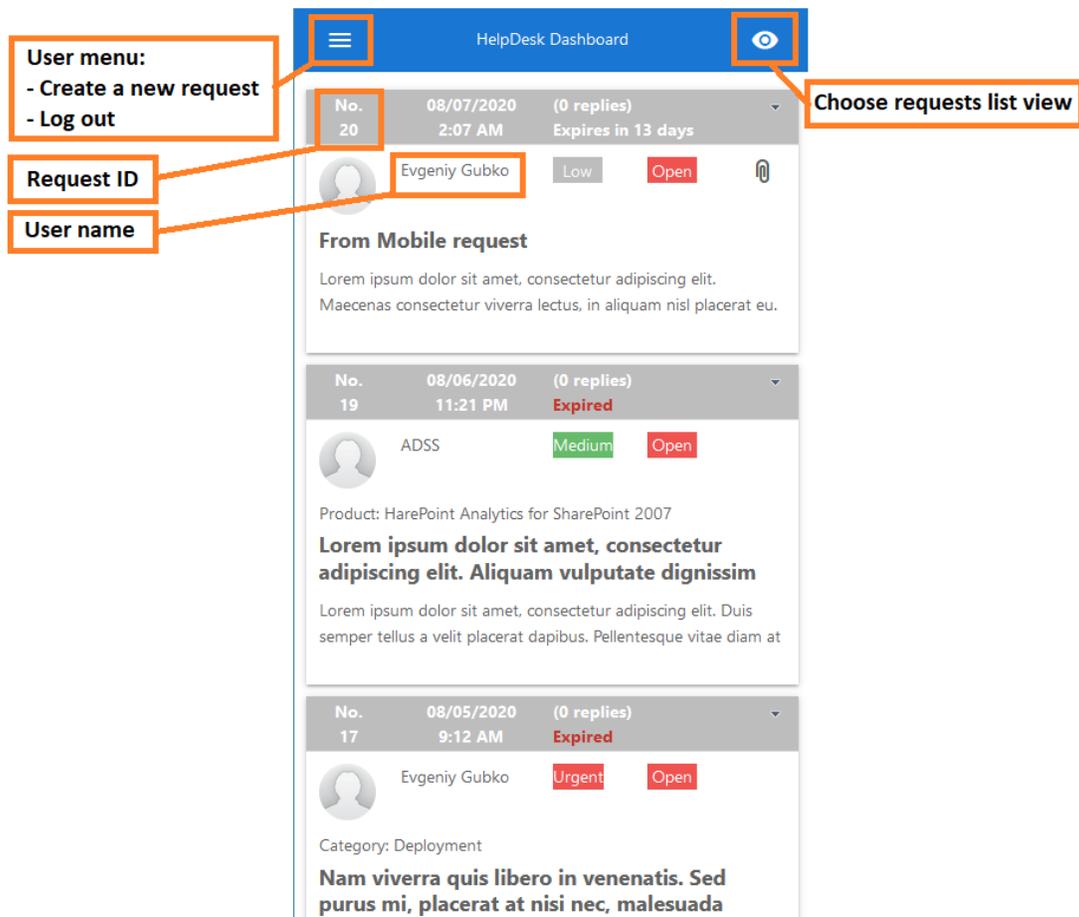
Note: All you need to access a Mobile version of the site is just a **browser** on a mobile device. There is no special mobile application that needs to be installed on a device for that purpose.

List of requests

The main screen displays **list of requests**, according to the selected **view**. The view can be changed using the  icon in the top right corner.

To open a request, click **Show** button on it, or **double-tap** anywhere on the request.

To **create a new request**, or to **log out**, use the menu button  in the top left corner.

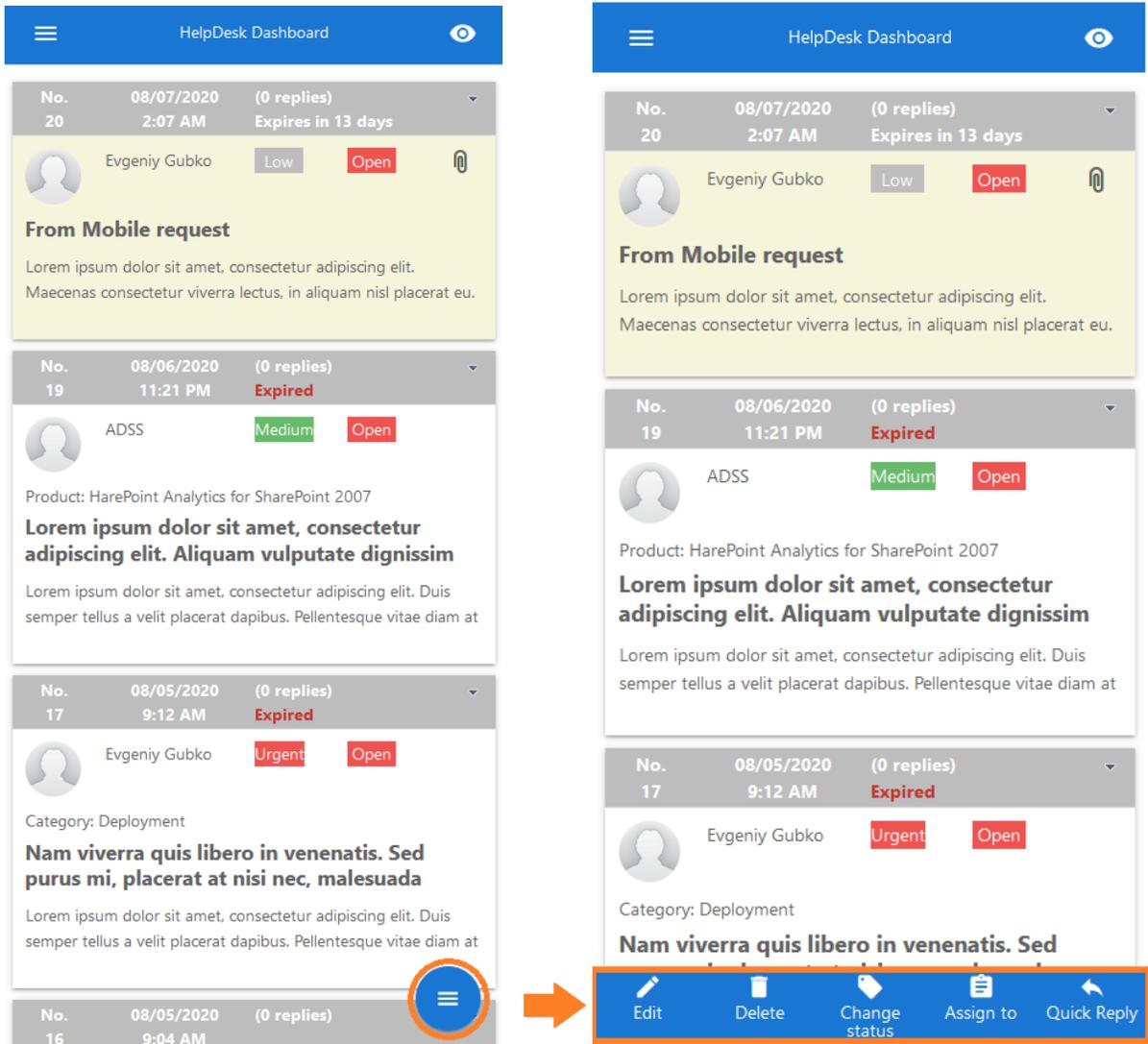


Tap on request to **open** it, or tap on its header to expand **request details**.

Use **long tap** to highlight one or several requests (marks it with yellow background) and get access to the following options:

- **Edit**
- **Delete**
- **Change Status**
- **Assign To**
- **Quick reply**

These options are displayed at the bottom bar:



Request page

A request page displays the discussion thread within a request, and provides all the options to work with request:

- Actions menu , with options to **Edit**, **Delete**, **Change Status** or **Assign/Reassign** request
- **Details** about the request (Request ID, Priority, Support Rep, Modified date, etc)
- **Hidden comments**, visible only to Technicians
- Button to scroll down directly to **reply text box** (at the bottom of the page)

The screenshot shows the HelpDesk Dashboard interface. At the top, there is a blue header with a back arrow, the text "HelpDesk Dashboard", and a hamburger menu icon. Below the header, there is a green "DETAILS" button and a blue downward arrow. The first message is from Evgeniy Gubko, dated 08/05/2020 08:40 AM. The subject is "How to manage access to reports in HarePoint HelpDesk?". The message content starts with "Hi." followed by a question about managing report access. Below the message, there are icons for editing (pencil) and quoting (quotes), and a button labeled "ADD HIDDEN COMMENT". The second message is from Alexey Shlibanov, dated 08/05/2020 08:40 AM, with the content "Hello ADSS." and "Hello.". A blue circular arrow icon is positioned below the second message.

Actions menu:

- Edit
- Delete
- Change Status
- Assign To

Edit this message

Quote this message

Add or display hidden comments (only visible to Technicians)

Scroll down to reply text box

Composing a new message

When composing a new message, you can expand a **toolbar** with various text editing options.

Under a reply textbox, buttons to **insert a Quick Reply** and to **insert a link to Knowledgebase article** are available.

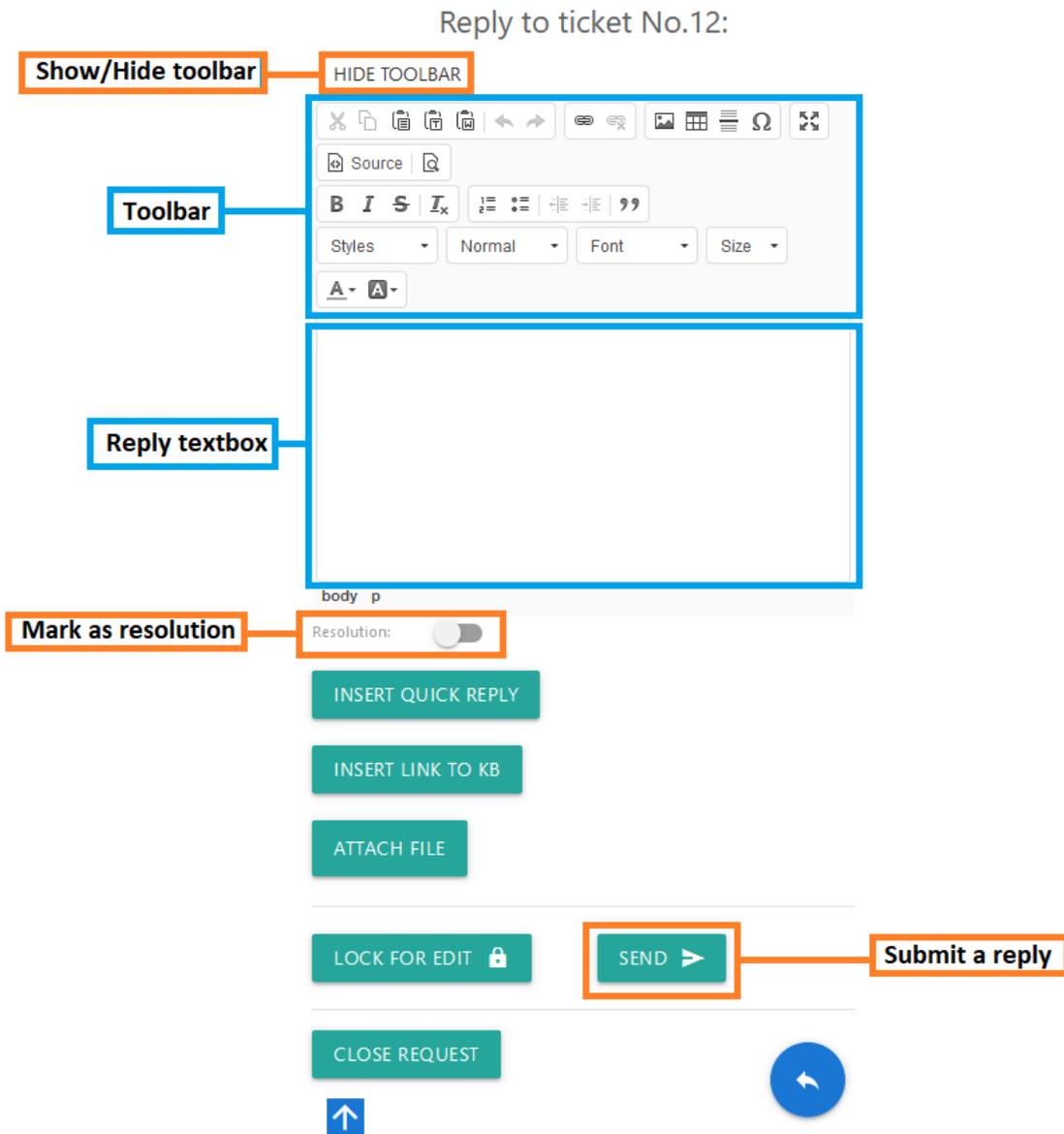
Using **Resolution** switch, you can mark this reply as resolution.

To prevent other Technicians from responding to the same request, you can lock it using **Lock for edit** button.

Click **Attach file** button to attach any files to the message.

With  button you can **submit** the message.

Reply to ticket No.12:



The screenshot shows the reply interface for ticket No.12. It includes a rich text editor toolbar with various icons for editing and formatting. Below the toolbar is a large text input area. At the bottom, there are several action buttons: 'Resolution:' with a toggle switch, 'INSERT QUICK REPLY', 'INSERT LINK TO KB', 'ATTACH FILE', 'LOCK FOR EDIT', 'SEND' (highlighted with an orange box and labeled 'Submit a reply'), and 'CLOSE REQUEST'. A blue circular arrow icon is also present at the bottom right.

Knowledge Base

HarePoint HelpDesk incorporates Knowledge Base functionality, a centralized repository for information used both by Technicians and by Users allowing storage and use of important information about various issues and their resolutions.

Using the Knowledge Base, Users can have their questions answered immediately even without submitting new requests. This notably reduces the Support Department load and improves its efficiency.

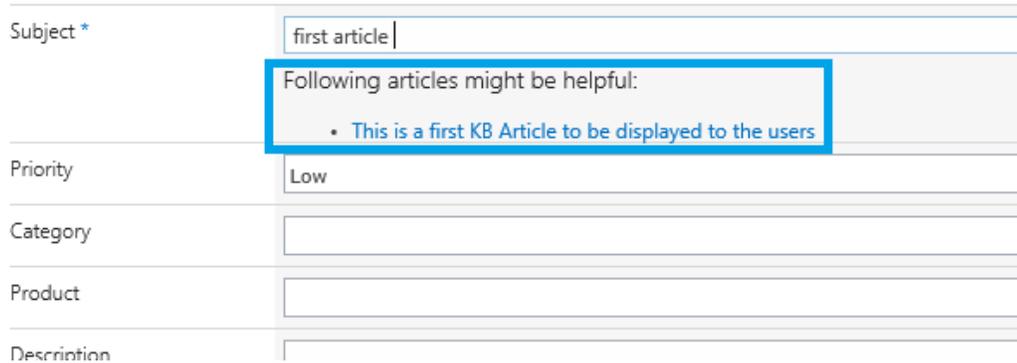
It is also possible to create Knowledge Base articles **visible only to Technicians** (for internal use only). Such articles cannot be used when replying to a User, as well as they will not be suggested to Users automatically.

Knowledge Base from User's point of view

Users can view Knowledge Base articles **in only three ways**:

- Technician has **manually provided a link to a KB article**, so the link is available in the text of a message from technician.
- (Only for the [desktop view](#) HarePoint HelpDesk web part) While the user is filling the form for the new request, the HelpDesk is constantly analyzing the Subject, Category and Product fields, and if there is one or more relevant articles found, links to them **automatically appear** in the form:

HarePoint HelpDesk Web Part



The screenshot shows a form with the following fields: Subject *, Priority, Category, Product, and Description. The Subject field contains the text "first article". A dropdown menu is open below the Subject field, displaying the text "Following articles might be helpful:" followed by a single bullet point: "• This is a first KB Article to be displayed to the users". The dropdown menu is highlighted with a blue border.

- If an article suggested to the user in either of two previous ways, has **links to other articles** in the Knowledge Base, the user may follow these links.

Note: Users are not be able to view all KB articles, or initiate a search across KB articles. The KB articles, marked as "Only for Technicians" will not be suggested.

Knowledge Base from Technician's point of view

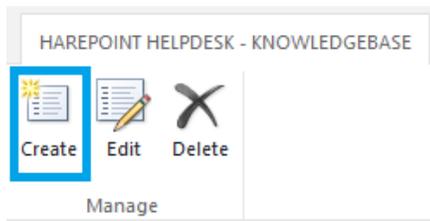
Technicians and **Viewers** can access the Knowledge Base at any time using the **Knowledge Base** link in the Menu (see [Menu - Knowledgebase](#) for details).

Viewers can only read articles.

Create, Edit or Delete article

The ribbon contains the following buttons:

- **Create**



A form for a new article is displayed:

Add article to Knowledge Base

EDIT **FORMAT TEXT** INSERT

Paste Clipboard Font Paragraph Styles Markup

Title * PowerShell in HarePoint Workflow Extensions

Article In the code, the object named **\$Context** is available. With this object, you can easily get access to workflow context, the output Result variable or to any other workflow variable, activity execution context, or the workflow history list (using [Write-Host](#)).

Category General questions Technical questions

Add > < Remove

Product HarePoint Analytics HarePoint HelpDesk HWE 2010 platform HWE 2013 platform HWE Office 365 HarePoint Workflow Ext

Add > < Remove

Related articles Test article

Add > < Remove

Only for Technicians

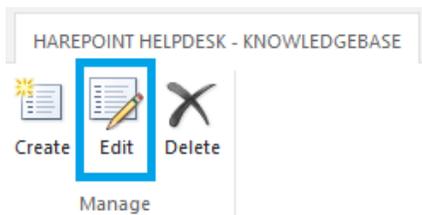
Save Cancel

- **Title (required)**
Specify the title for the article. Make sure the title contains proper keywords, since this field is used to automatically determine relevant articles for the users.
- **Article**
Provide the Knowledge Base article text here. This field supports formatting.
- **Category**
Specify related Categories; this field is taken into account when the system suggests articles as users are entering requests.
- **Product**
Specify related Products; this field is taken into account to automatically determine relevant articles for the users.
- **Related articles**
Specify other articles related to this article, if any. The links to these articles will be displayed to users when viewing the current article, and users will be able to click through to those articles.
- **Only for Technicians**
Select this checkbox if the article is designed for internal use only and should not be visible to Users. Such articles cannot be used when replying to a User, as well as they will not be suggested to Users automatically.

Note: Article ID is assigned automatically by HelpDesk. HelpDesk Administrator can modify the Article ID format.

- **Edit**

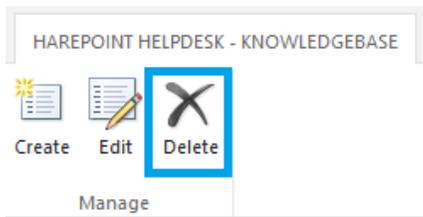
This button is only available when **one** article is marked with a check box.



A form to edit an existing article is displayed.
This form is identical to a form for a new article (see above).

- **Delete**

This button is only available when **one or more** articles are marked with a check box.

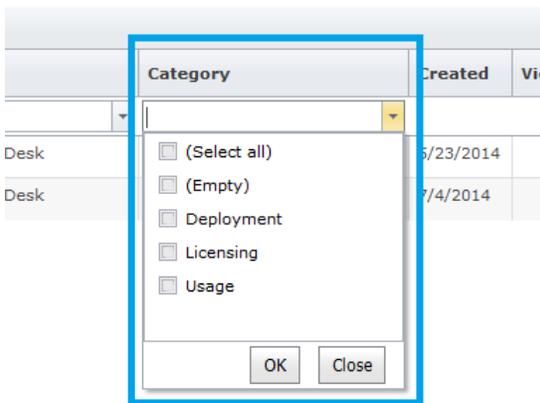


The selected articles are deleted permanently! Users will not be able to access these articles using the links that were given earlier by technicians.

List of Knowledge Base articles

Search in Knowledge Base						
<input type="checkbox"/>	Article ID	Title	Product	Category	Created	Views
<input type="checkbox"/>	KB1000	This is a first KB Article to be displayed to the users	HarePoint HelpDesk	Deployment; Licensing; Usage	5/23/2014	2
<input type="checkbox"/>	KB1001	Second article	HarePoint HelpDesk	Licensing	7/4/2014	0

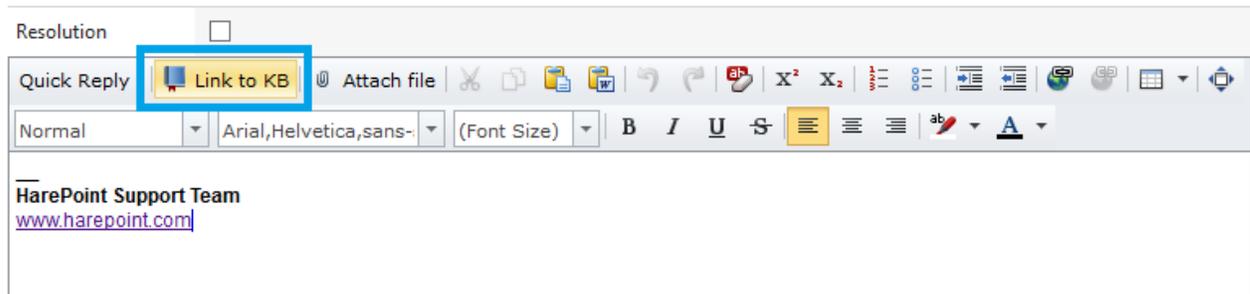
The list of Knowledge Base articles can be sorted by any of the columns by clicking on the column header. Columns can be **re-ordered** using drag-and-drop. To **find articles**, technicians can use the **Search in Knowledge Base** field above the list, or use **filters** that are available for most columns of the list:



Article ID	Title	Product
100	This is a first KB Article to be displayed to the users	HarePoint

How to provide a user with a link to Knowledge Base article

Technicians can provide users with a link to a Knowledge Base article using the **Link to KB** button in the New Message form - see [Sections of Request Page](#) for details:



Apart from that, links to articles can be provided to users **by suggestion**:

- While the user is creating a new request, HelpDesk constantly analyzes the Subject, Category and Product fields, and if there is one or more relevant articles found, the links to them **automatically appear** in the form:

HarePoint HelpDesk Web Part

Subject *	first article
	Following articles might be helpful: <ul style="list-style-type: none">• This is a first KB Article to be displayed to the users
Priority	Low
Category	
Product	
Description	

- Each article can have **links to other articles** in the Knowledge Base – linked articles are specified by Technicians in the **article properties**.

Note: Knowledge Base articles marked as “Only for Technicians” cannot be used when replying to a User, as well as they will not be suggested to Users automatically – see [Create, Edit or Delete KB article](#) for more details.

Support by e-mail

Sometimes it is more convenient for Users to receive support by e-mail only, rather than log into SharePoint and use a page with the User Console. This scenario is supported by HarePoint HelpDesk.

Important note: this feature requires additional setup by the HelpDesk Administrator. Contact your Administrator to make sure whether this option is available in your current HelpDesk configuration.

Note: This functionality is **designed only for Users**. Technicians can only use the Technician Dashboard to view and reply to requests.

Creating a new request by e-mail

In order to create a new request, User can simply send an e-mail to the HelpDesk e-mail address. A new request will be created based on this e-mail:

- e-mail **subject** will be used as request subject
- e-mail **body** will be used as request description (all formatting will be saved)
- e-mail **attachments** will be attached to the request

Note: It is not possible to select the Product or Category or to assign the responsible technician automatically when submitting a request by e-mail. However, since HarePoint HelpDesk provides wide capabilities to extend out-of-the-box functionality, some of these features can be implemented by the HelpDesk Administrator.

When the new request is created, the User will receive a **notification** e-mail, confirming the creation of the request.

Technicians will also receive notifications, depending on notification settings in HelpDesk.

Adding a reply by e-mail to technician's message

All requests created via **User Console, by e-mail, or by Technician on behalf of the User** appear in Technician Console and look identical for Technicians, so they can work with them all the same way.

When the Technician replies to a User's request, a notification e-mail is sent to the User that a **reply has been provided**. This e-mail contains the **full text** of the Technician's reply.

If the User needs to continue the conversation with Technician (e.g. provide additional information), the User can simply **send a reply to a notification e-mail**. In this case, HelpDesk will automatically detect that new incoming e-mail from User is actually a reply to an existing request and all the information will be added to the corresponding request.

Note: Do not modify the subject of the e-mail when replying; otherwise, a new request could be created instead of adding a reply to the existing one.

Important note: Technicians cannot reply to requests by sending a reply to notification e-mails they receive.

Closing a request by e-mail

It is **not** possible in HarePoint HelpDesk to close the request directly by e-mail.

Note: since HarePoint HelpDesk provides wide capabilities to extend out-of-the-box functionality, this feature can be implemented by the HelpDesk Administrator.

However, there is an indirect way to close the request by e-mail.

When a Technician provides a resolution, he changes the status of the request to **Resolved** (either by changing the status directly, or by using the **Resolution** checkbox). In this case, the User receives a notification e-mail stating that a **Resolution has been provided**. If the User is satisfied with the resolution, he **can simply stop at this point not send any replies** to that notification e-mail, so the request will remain in **Resolved** status. After some time (default 10 days), the request will be closed automatically.

Note: the status is changed from **Resolved** to **Open** in case a reply is received. Open requests are never closed automatically.

Archived requests

The later versions of HarePoint HelpDesk **Standard Edition** introduce a new feature – requests archiving. At some point you may figure out you are having too many closed or very old requests stored in HelpDesk. Removing them is not really a good option since you possibly may need to refer to these requests in the future.

HarePoint HelpDesk suggests a good way to store and manage these requests: you can move (or copy) them to archive. You will be able to **view** the archived requests quickly and easily right from Technician Dashboard, and, if necessary, **restore** them back to HarePoint HelpDesk site.

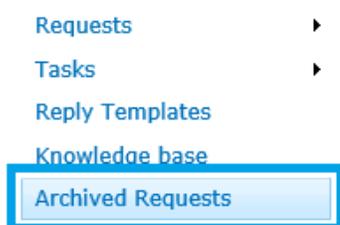
Requests in archive contain all the attachments, hidden comments and requests history.

Note: Archiving functionality is not enabled by default. Contact your HelpDesk Administrator to enable it and configure archiving parameters, such as schedule and which requests need to be archived.

View archived requests

Only Technicians and Viewers can view the archived requests.

To view the archived requests, access Technician Dashboard and click on **Archived requests** in the left pane.



The archived requests are displayed in the same design as normal requests in Technician Dashboard.

Requests from archive for 11/27/2015 7:22 AM			
Drag a column header here to group by that column			
	ID	Subject	Status
>		2 Update	ExternalClassC1 Open
>		3 My monitor blinks	ExternalClass1E Resolved

Restore archived requests

Technicians can restore requests from archive back to HarePoint HelpDesk site.

To restore requests, go to Archived requests.

Select one or more requests in the list and click **Restore** button on the ribbon.



The confirmation window will pop up:

Restore request(s) from archive

The selected request will be restored from archive. Upon restoring, the new ID will be assigned to it.

Delete request from archive after restoring

Restore

Cancel

If necessary, you can check to **Delete request from archive after restoration**.

Note: this option requires a specific permission – contact your HelpDesk Administrator if it's not available.

Click **Restore** button.

Note: The restored tickets get the new ID. In particular, that means, if you did not check the option to *delete request from archive after restoration*, then upon next archiving this request will be archived as a new request with its new ID.

When restoring a request, a **field mismatch** can occur between current fields in Requests list on HarePoint HelpDesk site, and the fields stored in archive for this request.

In this case, a warning message will be displayed. You can either **Continue** restoring (ignoring the missing fields) or create manually the missing fields and then **Try** again the restoration:

 List fields in the archive do not match the fields on the site. The following fields are missing.

Internal name	Field Display name	Field Type
---------------	--------------------	------------

List: Requests

ReferenceID	ReferencelD	Number
-------------	-------------	--------

To restore the request(-s) fully with all values, create missing fields and click Try again button. Press Continue to restore request(-s) without these fields.

Delete request from archive after restoring

Continue

Try again

Cancel

Consult your HelpDesk Administrator, if necessary.

Note: Version history is not restored together with the request.

Reports Designer

Older versions of HarePoint HelpDesk (16.4 and older) included only the built-in (predefined) reports that could not be changed. Neither it was possible to create custom reports or manage permissions to reports. HarePoint HelpDesk version **16.5** introduces a **Reports Designer**.

Note: Reports Designer is only available in **Standard Edition** of HarePoint HelpDesk.

The **Basic Edition**, however, still includes the [built-in \(predefined\) reports](#).

Reports Designer has significant advantages and enhancements, compared to built-in reports. It is now possible to create custom reports, as well as manage permissions to reports flexibly.

In particular, HarePoint HelpDesk site administrator can configure permissions in a way that Managers are able to add and edit reports, while HelpDesk Technicians can only view reports.

Note: for more details on Reports Designer configuration and permissions management, refer to **HarePoint HelpDesk Administrator Guide**.

Note: Initial configuration is required to enable Reports Designer. It is not set up out-of-the-box. Contact your HarePoint HelpDesk site administrator if Reports Designer is not available for you.

Reports overview

By default, four groups of reports are available out-of-the-box (they resemble the built-in reports):

- **Requests trends**
- **Resolution reports**
- **Response time**
- **SLA Violations**

Report groups are used to organize reports conveniently and break them down by their types.

It is possible to **collapse** or **expand** groups by clicking on arrows next to group name.

Reports that are not assigned to any of the groups, displayed under **Ungrouped reports**:

Ungrouped reports ▾

- 🔄 SLA Violations by category
- 🔄 SLA Violations by priority
- 🔄 SLA Violations by product

An **Overview** page displays four reports:

The screenshot shows the Reports Designer interface with the following components:

- REPORTS DESIGNER BROWSE** header with icons for Create, Edit, Remove, Manage report groups, Date Range (Preceding Day, Preceding 7 Days, Preceding Month, More), and Export (Export to Spreadsheet, Export to PDF).
- Overview** section with a dynamic menu for Requests trends:
 - 🔄 Resolution by category
 - 🔄 Resolution by priority
 - 🔄 Resolution by product
 - 🔄 Resolution by responsible
 - 🔄 Response time by category
 - 🔄 Response time by priority
 - 🔄 Response time by product
 - 🔄 Response time by responsible
 - 🔄 SLA Violations by category
 - 🔄 SLA Violations by priority
 - 🔄 SLA Violations by product
 - 🔄 SLA Violations by responsible
 - 🔄 SLA Violations by support group
 - 🔄 Trends by category
 - 🔄 Trends by day
- Resolution by category** chart and table:

Category	Resolved	Avg. messages
Not Selected	2	1.00
Licensing	1	2.00
Deployment	3	2.00
Usage	5	1.63
Sum=11		Max=2.00
- Resolution by priority** chart and table:

Priority	Resolved requests	Avg. messages
Low	8	1.90
Medium	2	1.67
High	1	1.25
Sum=11		Avg=1.61

The left pane contains the dynamic menu, showing groups and reports in them.

Resolution reports ▾

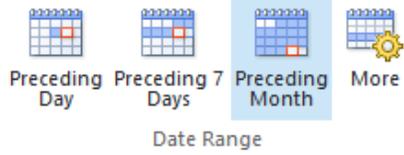
- 🔒 Resolution by category
- 🔄 Resolution by priority
- 👤 Resolution by product
- 🔄 Resolution by responsible

Icons next to report name indicate the access level, as follows:

- 🔒 - Private report (only visible to its author)
- 👤 - Author has limited access to this report to only specific users
- 🔄 - Common report (available for anyone who has permission to view reports)

The ribbon contains actions buttons.
On an **Overview** page you can:

- select the date range for reports



- go to new report creation page



Create

- manage report groups



Manage report groups

Click on report name in the left pane, to view the report in full details:

REPORT DESIGNER BROWSE SHARE

Create Edit Remove Manage report groups

Preceding Day Preceding 7 Days Preceding Month More

Export to Spreadsheet Export to PDF

Manage reports Date Range Export

Overview

Requests trends ▾

- Trends by category
- Trends by day
- Trends by priority
- Trends by product
- Trends by responsible
- Trends by users

Resolution reports ▾

- Resolution by category
- Resolution by priority
- Resolution by product
- Resolution by responsible

Response time ▾

- Response time by category
- Response time by priority
- Response time by product
- Response time by responsible

SLA Violations ▾

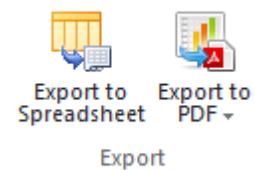
- SLA Violations by category
- SLA Violations by priority
- SLA Violations by product

Date Range: 6/3/2018 - 7/3/2018 Public report Created by: System Account

Priority	New	Open	Resolved
Low	10	2	0
Medium	3	1	0
High	4	3	0
	Sum=17	Sum=6	Sum=0

Exporting reports

Any report can be **exported** to a spreadsheet or to PDF in portrait or landscape orientation:



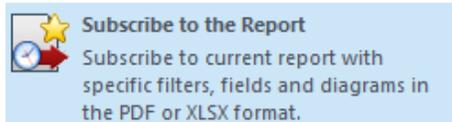
Subscription to reports

It is possible to **subscribe to reports** to receive them by e-mail according to a schedule using the button on the ribbon:

Note: this feature is available only in HarePoint HelpDesk version 16.9 and newer.



Subscribe to the Report



- Select the **report** in the drop-down list (the currently viewed report is selected by default)

Select the report

You can select the report to be exported

Report:

Trends by product

- Select **recipients** (the currently logged in Technician is added by default)

Select recipients

You can enter user names, group names, or e-mail addresses. Separate them with semicolons.

Users/Groups:

Technician 1:

- Set the **schedule for exporting** reports

Set scheduler for exporting

You can set the schedule to export the report

Schedule:

- Send report immediately
 Send report daily
 Send report weekly
 Send report monthly

Time:

1 Sunday 12:00 AM

- Specify the **format** – PDF or XLS

Specify the format

You can specify the format of the exported report

Format:

- PDF
 Portrait
 Landscape
 XLS

- Expand **Configure filters** and select the **date range for the data in the reports**

Configure filters

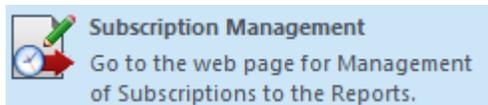
You can configure filters for the report to be exported

Select date range to display data

Note: **Last month** is always selected by default! The filter does not inherit the date range selected on the ribbon from the report that is currently displayed!

- Expand **Define view for the report** and adjust the view of the report, if necessary.

Subscription Management



You can manage subscriptions on the **Subscription Management** page.

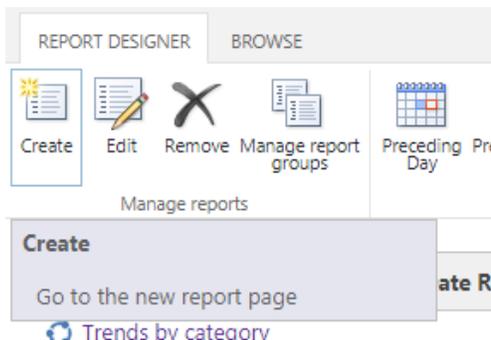
Creating, Editing and Removing reports

Creating a new report

Note: since Reports Designer provides a flexible permission management, you need to have sufficient permissions to be able to create a new report. For more details, consult your HelpDesk Administrator or refer to **Reports Designer - Permissions Management** paragraph in **Administrator Guide**.

Follow these steps to create a new report:

- Click **Create** button on a ribbon



- Fill in the form for the new report. Specify the report name, group and description:

Report title
Trends by priority

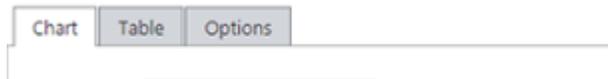
Group
Requests trends

Description
This report shows dynamic and intensity of creating and processing requests within the specified time frame and grouped by priority.

- Select **Show on overview page** option, if the new report should be displayed on an **Overview** page. (Maximum 4 reports can be displayed on an Overview page)

Show on overview page

Report creation form consists of three tabs: **Chart**, **Table** and **Options**:



- The **Chart** tab contains parameters to build a chart
- The **Table** tab contains parameters to build a table
- The **Options** tab contains optional parameters for a report

Note: Options tab is only available for users with **Manage permissions** permission for **Reports** library – for more details consult your HelpDesk Administrator or refer to **Reports Designer - Permissions Management** paragraph in **Administrator Guide**.

Note: There is no need to create both the chart and the table in report; if necessary, you can have only either a chart or a table.

Creating a chart

Go to **Chart** tab.

Type in the chart name.

HelpDesk allows creating a chart with one or two series. To add a series, click on «+» next to **Data series**:

Data series 

A fields set will appear:

Chart Table Options

Chart name

Data series +

X Name *

Type *

Group by (Axis X) *

Value (Axis Y) *

Filter And Status Equals Open

1. Specify the series **Name**
2. Specify the chart **Type**. The available types are: *Bar, Stacked Bar, Line, Spline, Pie, Point*
For instructions on creating a Stacked Bar – refer to [next paragraph](#).
Note: When a **Pie** chart is selected, it is only possible to have one data series.
3. **Group by (axis X)** – can be specified as a field or a period.
As a period, *Day, Week* or *Month* are available:

Group by (Axis X) *

Value (Axis Y) *

Day
Week
Month

Note: If you have two series on a chart, both of them need to be grouped by the same parameter (have the same selection for axis X)!

4. **Value (Axis Y)** – specify the field for calculation and the aggregation function.
Filter – you can additionally filter the values for Axis Y.

Examples:

- A number of open tickets :

Value (Axis Y) *

Filter And Status Equals Open

- Average number of comments in closed tickets:

Value (Axis Y) *

Filter **Or**

- Status Equals Closed
- Status Equals Resolved

➤ Maximum resolution waiting time:

Value (Axis Y) *

Filter **Or**

- Status Equals Closed
- Status Equals Resolved

5. When all the required fields are filled, click **Build Chart** button to build a chart preview:

Chart | Table | Options

Chart name: **Open and Resolved by pr**

Data series +

X Name *

Type *

Group by (Axis X) *

Value (Axis Y) *

Filter **And**

- Status Equals Open

X Name *

Type *

Group by (Axis X) *

Value (Axis Y) *

Filter **Or**

- Status Equals Closed
- Status Equals Resolved

Priority	Open	Resolved
Low	2	8
Medium	1	2
High	3	1

Creating a Stacked Bar chart

A Stacked Bar can be created in two ways:

1. Specify one data series and a field by which the data should be stacked.

Example: the chart needs to display the ratio between the request creation modes (**Mode** field), for each day. This can be achieved as follows:

Data series +

✕ Name *

Type *

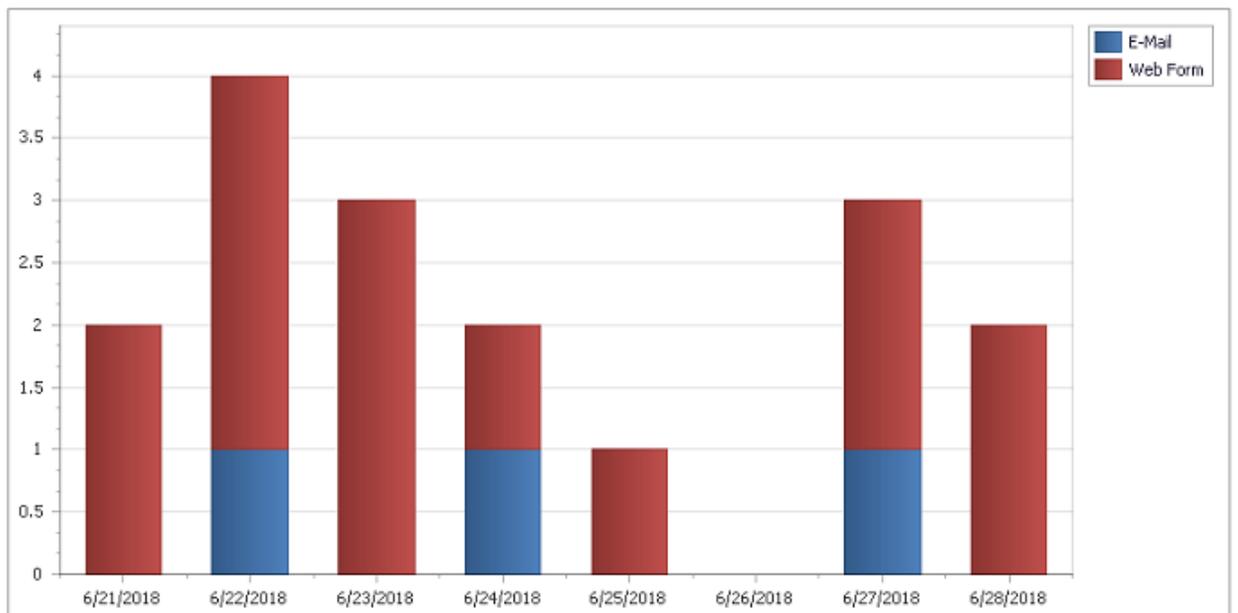
Stack by

Group by (Axis X) *

Value (Axis Y) *

Filter And ⊙

The result would be:



- Specify two data series with identical axis Y parameter.

Example: the chart needs to display requests by categories, also indicating ratio between open and closed requests for each category.

To achieve this, add two data series, but leave **Stack by** field empty.

For the first data series, set filter **Status equals Open**; for the second data series, set filter **Status equals Resolved or Status equals Closed**.

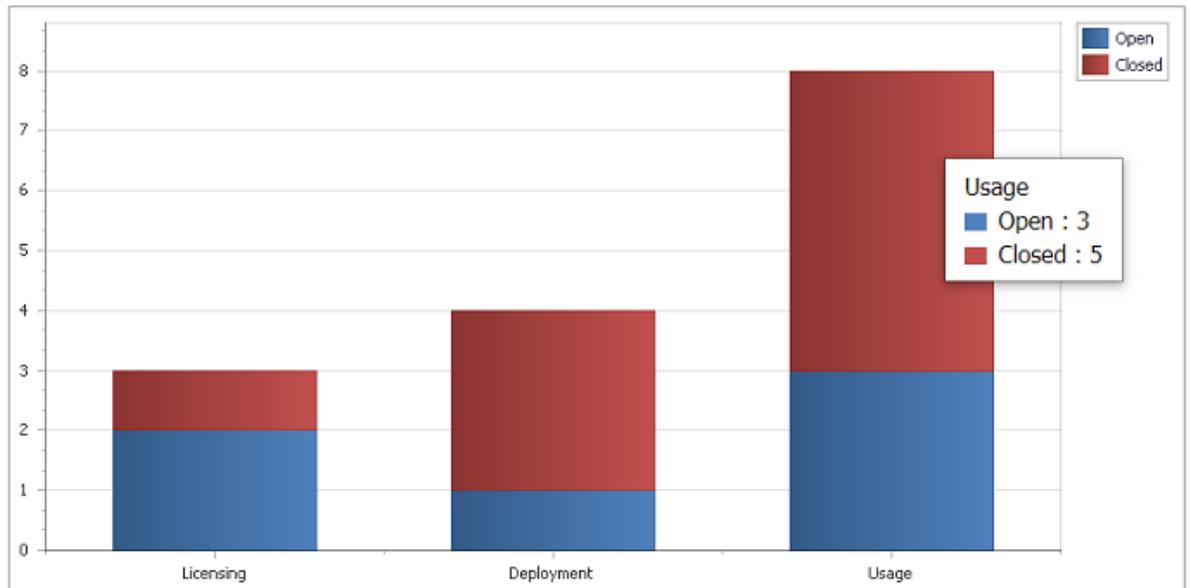
X Name *
 Type *
 Stack by
 Group by (Axis X) *
 Value (Axis Y) *

 Filter **And**
 Status Equals Open

X Name *
 Type *
 Group by (Axis X) *
 Value (Axis Y) *

 Filter **Or**
 Status Equals Closed
 Status Equals Resolved

The result would be:

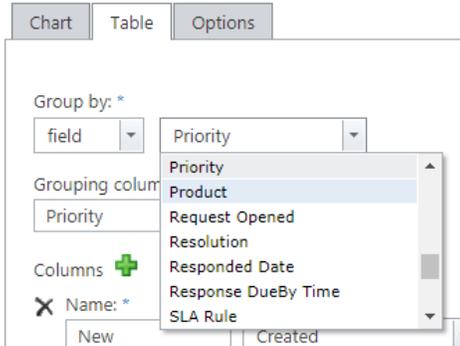


Creating a table

To build a table, go to **Table** tab.

Note: There is no need to create both the chart and the table in report; if necessary, you can have only either a chart or a table.

1. Specify a field by which the data should be grouped. This will be the first column in a table, and the table will be based on this first column.
Data can be grouped either by a field (Priority, Product, Support Rep, etc) or by period (day, week, month):



2. To add columns, click on “+” next to **Columns**. Up to 5 columns can be added.
Specify the name for the column header (**Name**), **Field** based on which this column will display data, **Aggregation function**, and **Filter** (optional).

Examples:

- Number of open requests:

Name: * Field: * Aggregate function: *

And Filter

- Number of **overdue by resolution** requests:

Name: * Field: * Aggregate function: *

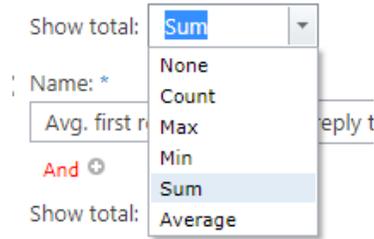
And Filter

- Average first reply time:

Name: * Field: * Aggregate function: *

And Filter

If necessary, select to **Show total** for this specific column; several aggregation functions are available:



3. Click **Build table** button to build a table preview.

Chart
Table
Options

Group by: *

field

▼

Priority

▼

Grouping column name: *

Priority

Columns +

✕ Name: * Field: * Aggregate function: *

Avg. response time

▼

Avg. response time

▼

avg

▼

And +

Show total: Sum ▼

✕ Name: * Field: * Aggregate function: *

Avg. first reply time

▼

First reply time

▼

avg

▼

And +

Show total: Max ▼

Build table

Priority	Avg. response time(hours)	Avg. first reply time(days)
High	2.72	1.58
Low	0.01	4.23
Medium	0.01	2.78
	Max=2.72	Max=4.23

Report Options

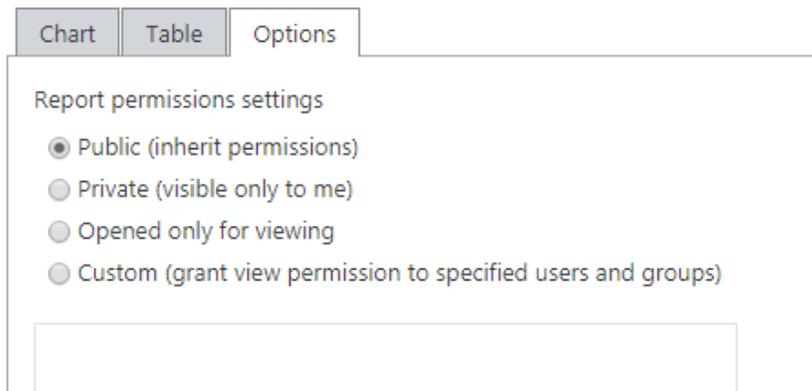
Note: The **Options** tab is only available for users with **Manage permissions** permission for **Reports** library – for more details consult your HelpDesk Administrator or refer to **Reports Designer - Permissions Management** paragraph in **Administrator Guide**.

Technically, reports are files with **.report** extension, stored in a standard SharePoint document library named **Reports** on HarePoint HelpDesk site.

When a user creates his/her first report, a **folder** with a unique ID is created in **Reports** library. All reports created by this user will then be stored in this folder.

Permissions to reports are managed by managing permissions to **Reports** library and/or to **folders** containing user reports in this library. For that, SharePoint permission management mechanisms and interface are used.

80 Reports Designer | HarePoint.Com



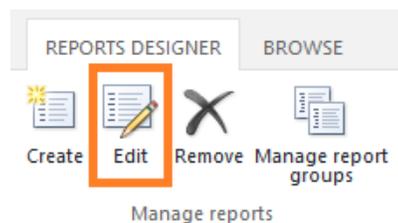
- **Public (inherit permissions)**
The report inherits permissions from the parent folder of the current user. That is, this report can be edited/removed also by other users having corresponding permissions to a parent folder.
- **Private (visible only to me)**
The report does not inherit permissions from the parent folder of the current user. That is, this report can only be accessed by a report author. No other users will be able to view this report.
- **Opened for viewing**
This report can be viewed by any user having access to author's reports folder. The report can be edited/removed only by the author.
- **Custom**
Only the specified user accounts or groups will have access to the report. No other users will be able to view this report.

Editing a report

Note: since Reports Designer provides a flexible permission management, you need to have sufficient permissions to be able to edit a specific report. For more details, consult your HelpDesk Administrator or refer to **Reports Designer - Permissions Management** paragraph in **Administrator Guide**.

To edit a report, follow these steps:

- Click **Edit** button on a ribbon:



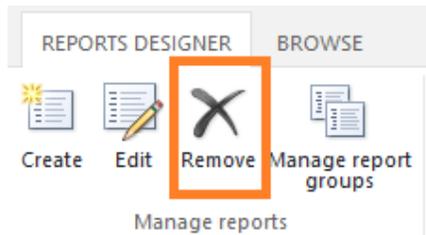
- Edit report parameters as necessary. Refer to [Creating a new report](#) paragraph for more details on each parameter.

- Click **Save** button on a ribbon, or **OK** button at the bottom of the page
Note: changes will not be saved if you don't have sufficient permissions to edit this report!

Removing a report

Note: since Reports Designer provides a flexible permission management, you need to have sufficient permissions to be able to remove a specific report. For more details, consult your HelpDesk Administrator or refer to **Reports Designer - Permissions Management** paragraph in **Administrator Guide**.

To remove a report, click **Remove** button on a ribbon:



Important note: The report will be removed permanently; it wouldn't be possible to restore it later.

Built-in Reports

In older versions of HarePoint HelpDesk, only built-in (predefined) reports were available. Since version 16.5 of HarePoint HelpDesk, a [Reports Designer](#) became available. It provides much more advanced reporting capabilities compared to older built-in reports. The **built-in (predefined) reports** however are still available in HarePoint HelpDesk, although their capabilities are much more limited compared to Reports Designer.

This chapter describes the **built-in reports**. The advanced reports from Reports Designer are described in [Reports Designer](#) chapter.

HarePoint HelpDesk generates various reports to assess the load and efficiency of the Support Department.

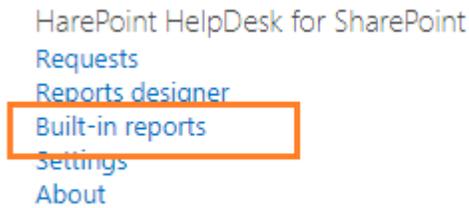
Note: Reports can be viewed by **Technicians** and **Viewers** only. They are not available for the Users.

Accessing reports

To access the built-in reports:

- In SharePoint 2019/2016/2013: click  - Site Settings
 In SharePoint 2010: click  - Site Settings

- In **HarePoint HelpDesk for SharePoint** section click **Reports dashboard** link.



List of available reports

Currently the following reports are available:

Report name	Description
Overview	Overview reports of HarePoint HelpDesk
Trends by day	This report shows dynamic and intensity of creating and processing requests within the specified time frame
Trends by priority	This report shows dynamic and intensity of creating and processing requests within the specified time frame and grouped by priority
Trends by category	This report shows dynamic and intensity of creating and processing requests within the specified time frame and grouped by category
Trends by product	This report shows dynamic and intensity of creating and processing requests within the specified time frame and grouped by product name
Trends by responsible	This report shows dynamic and intensity of creating and processing requests within the specified time frame and grouped by responsible person
Trends by users	This report shows dynamic and intensity of creating and processing requests within the specified time frame and grouped by users
Resolution by priority	This report shows statistics of processed requests within the specified time frame and grouped by priority. The report contains data about the number of processed requests, average number of requests, and average request processing time, grouped by priority
Resolution by category	This report shows statistics of processed requests within the specified time frame and grouped by category. The report contains data about the

	number of processed requests, average number of requests, and average request processing time, grouped by category
Resolution by product	This report shows statistics of processed requests within the specified time frame and grouped by product name. The report contains data about the number of processed requests, average number of requests, and average request processing time, grouped by product name
Resolution by responsible	This report shows statistics of processed requests within the specified time frame and grouped by responsible person. The report contains data about the number of processed requests, average number of requests, and average request processing time, grouped by responsible person
Response time by priority	This report shows average time of response to user's request, grouped by priority
Response time by category	This report shows average time of response to user's request, grouped by category
Response time by product	This report shows average time of response to user's request, grouped by product name
Response time by responsible	This report shows average time of response to user's request, grouped by responsible person
SLA Violations by priority	This report shows the number of SLA violations, grouped by priority
SLA Violations by category	This report shows the number of SLA violations, grouped by category
SLA Violations by product	This report shows the number of SLA violations, grouped by product
SLA Violations by support group	This report shows the number of SLA violations, grouped by support groups
SLA Violations by responsible	This report shows the number of SLA violations, grouped by responsible

Viewing reports

Select the required report in the left pane:

HelpDesk Test

HarePoint HelpDesk - Overview ⓘ

Requests trends

- Trends by day
- Trends by priority
- Trends by category
- Trends by product
- Trends by responsible
- Trends by users

Resolution reports

- Resolution by priority
- Resolution by category
- Resolution by product
- Resolution by responsible

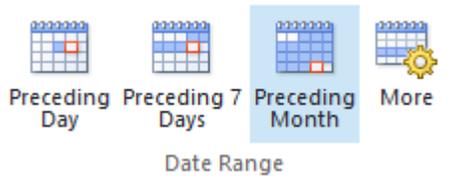
Responsible	Opened	Resolved	Not responded
Not Assigned	1	0	1
Administrator	1	0	1
Total	2	0	2

Status

Resolved
Open
On Hold
Closed
Total

Priority	Opened	Resolved	Not responded
Urgent	0	0	0
Medium	0	0	0
Low	2	0	2

By default, the information is displayed for the preceding month, but you can select any other **date range** using buttons on the ribbon:



You can **filter** the following reports by Support Group: **Trends by responsible**, **Resolution by responsible**, **Response time by responsible**, **SLA Violations by responsible**. Using the filter, you can display data only by responsible technicians from that group:

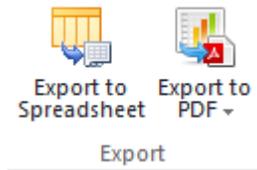


The information in tables in the reports can be **sorted** by ascending or descending order, by clicking on the header.

In most reports, **values** in the tables **are clickable**, so you can **drill-down** to get the detailed information on that value.

Exporting reports

Any report can be **exported** to spreadsheet or to PDF in portrait or landscape orientation using the buttons on the ribbon:



With the report exported to a spreadsheet, you can perform **custom calculations** the data table.

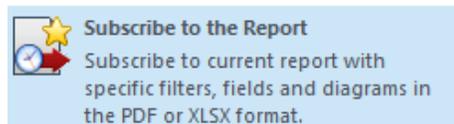
Subscription to reports

Note: In HelpDesk version 16.4 and older, reports subscription was only available in **Standard edition**. Since version 16.5 and newer, reports subscription to built-in reports is also available in **Basic edition**.

It is possible to **subscribe to reports** to receive them by e-mail according to a schedule using the button on the ribbon:



Subscribe to the Report



- Select the **report** in the drop-down list (the currently viewed report is selected by default)

Select the report

You can select the report to be exported

Report:

Trends by product

- Select **recipients** (the currently logged in Technician is added by default)

Select recipients

You can enter user names, group names, or e-mail addresses. Separate them with semicolons.

Users/Groups:

Technician 1;



- Set the **schedule for exporting** reports

Set scheduler for exporting

You can set the schedule to export the report

Schedule:

- Send report immediately
- Send report daily
- Send report weekly
- Send report monthly

Time:

1 Sunday 12:00 AM

- Specify the **format** – PDF or XLS

Specify the format

You can specify the format of the exported report

Format:

- PDF
 - Portrait
 - Landscape
- XLS

- Expand **Configure filters** and select the **date range for the data in the reports**

Configure filters

You can configure filters for the report to be exported

Select date range to display data

Last month

Note: **Last month** is always selected by default! The filter does not inherit the date range selected on the ribbon from the report that is currently displayed!

- Expand **Define view for the report** and adjust the view of the report, if necessary.

Define view for the report

You can define views of the exported report

Show chart

Select series to show on the chart

Opened

Resolved

Sort by the series

Opened ▾

Show table

Select columns to show in table

Product

Opened

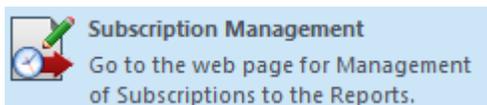
Resolved

Sort by column

Product ▾ Descending ▾

Note: Unless you make changes in this section, the **default settings are used**. Any modifications made in the currently viewed report, like sorting, are **not automatically transferred** to this section!

Subscription Management



You can manage subscriptions on the **Subscription Management** page.