

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 <u>Technician Console</u>**: 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 <u>this paragraph</u>.

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



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.

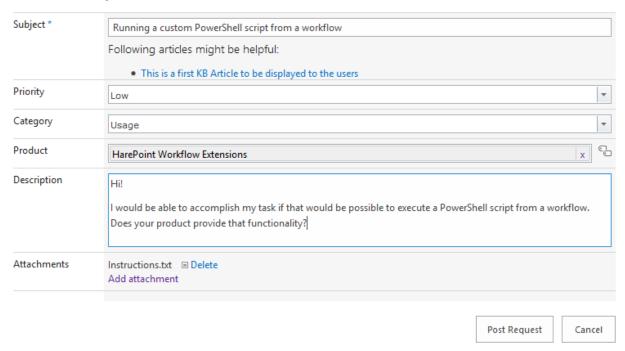
Click the **Create request** button to create a new request. The request form will appear. Fill in the form to make a new request.

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



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

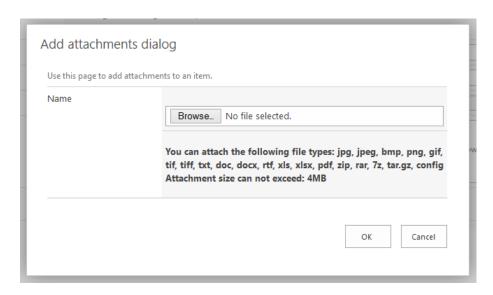
Use this field to enter a detailed description of the issue. You can format your text using the tools in the Format Text tab on the ribbon:



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**.



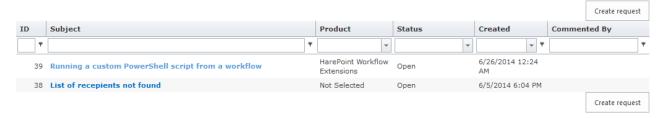
Note: the list of allowed file formats and maximum attachment size limit can be modified in the Product Settings by the HelpDesk Administrator.

Monitoring Your Request Status

List of Requests

support

HarePoint HelpDesk Web Part



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

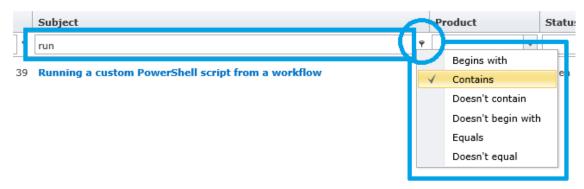
Commented by

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**.

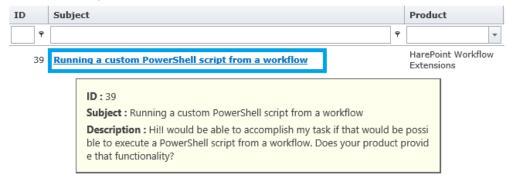
Note: These adjustments are stored by the browser and can be reset inadvertently e.g. by cleaning browser cache.

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:



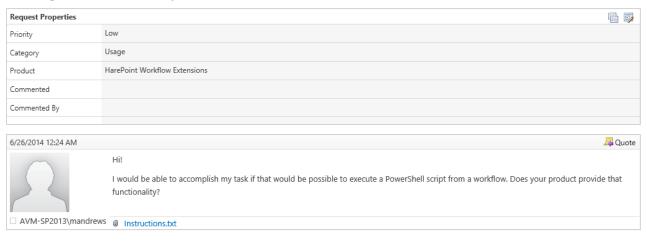


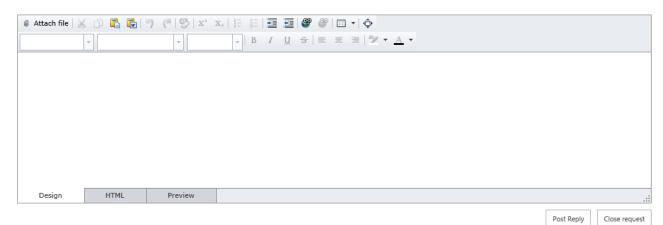
Request Page

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

User Requests

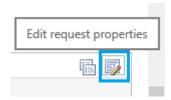
→ Running a custom PowerShell script from a workflow



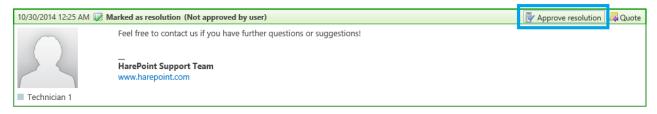


Users can perform the following operations on this page:

• **View properties** of the request and **modify** them if necessary using the button in the top right corner:



- Edit the request message
- 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 using the Approve resolution button:



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:

Show Request History

When a **new message** has been received from a 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** 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!

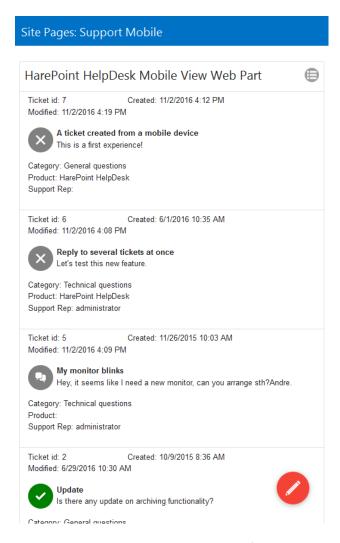
Mobile View User Console

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.

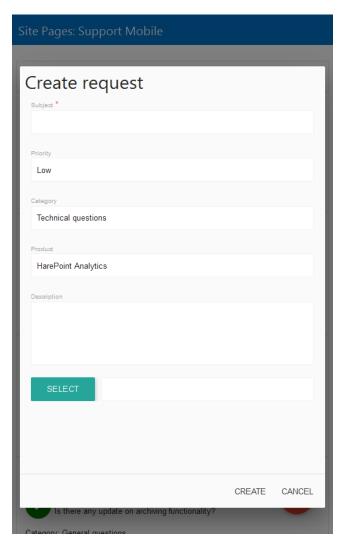
Request Creation



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:





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.

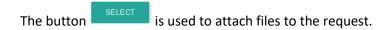
Product

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



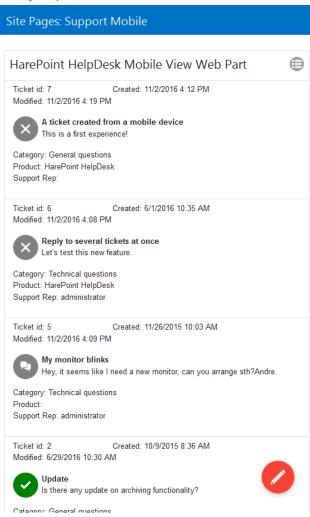
The list of attachments added to the request is displayed below that field, as well as the link to delete attachments.



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



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:

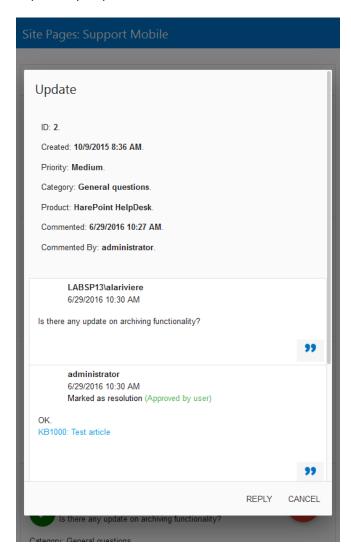
- Request ID
- Creation Date
- Last Modified Date
- Subject
- Preview of request description

18 User Console | HarePoint.Com

- 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:

- 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 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
 In SharePoint 2010: click
 Site Actions ▼ Site Settings
- In the HarePoint HelpDesk for SharePoint section, click Requests.

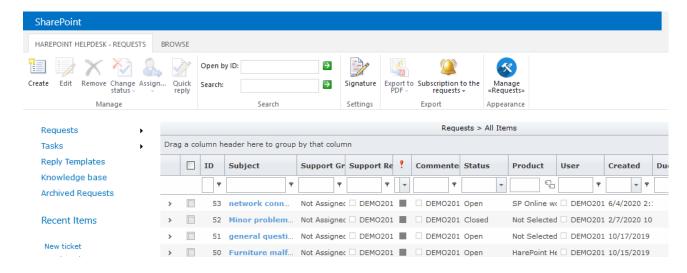
HarePoint HelpDesk for SharePoint
Requests
Reports designer
Built-in reports
Settings
About

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; contact your HelpDesk Administrator for direct link.

Detailed description if mobile site interface is available in Mobile version section.

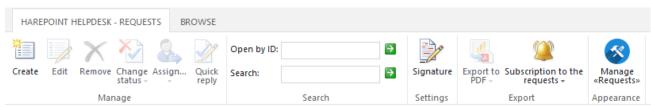


The Technician Console Interface provides the Technician (HelpDesk Operator) and Viewer with information concerning the requests and with quick access to frequently used tools and sources of information.

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.

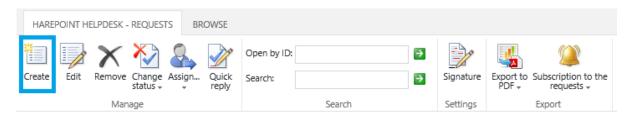
Toolbar



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

Create

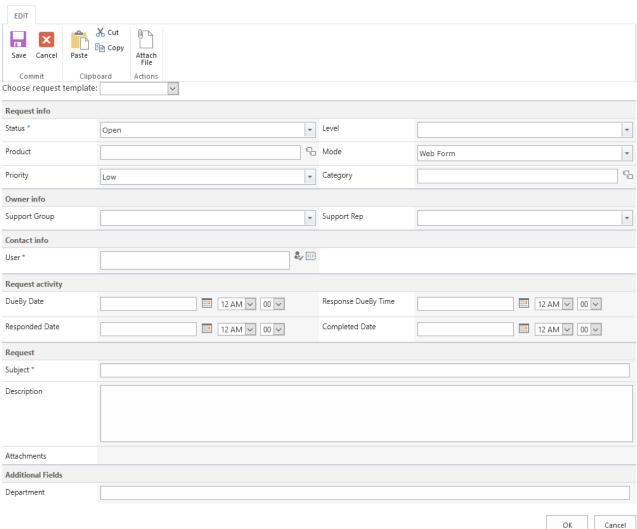
Create a new request.



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:

×



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)

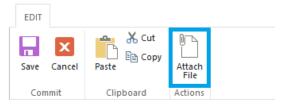
Request Subject is displayed in a list which can be viewed both by the User and the Technician. The field is typically used to provide a short description of the problem.

Description

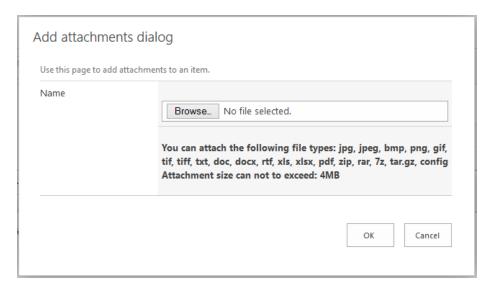
Use this field to enter text. You can format your text with the Editing Tools. The field is used to provide a detailed description of the issue.

Attachments

Use the **Attach File** button on the toolbar (ribbon) to attach files to the request:

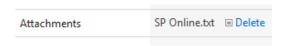


The *Attach File* button allows you to choose a **single file** from the computer to be attached to the message. It is possible to attach multiple files at once.



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

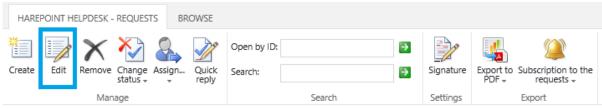
The **Attachments** field becomes visible when there are files attached. This field contains a list of attached files, as well as links to delete them:

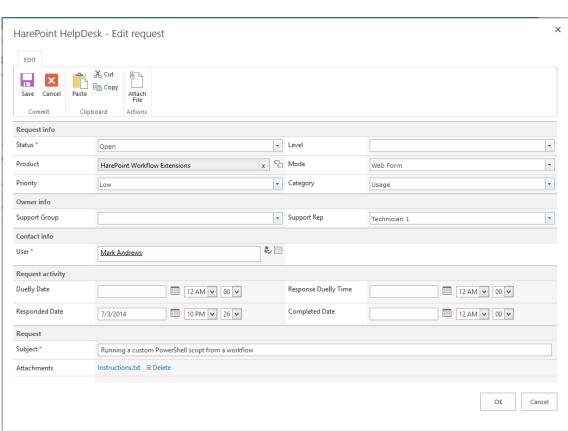


When all the necessary information is entered, click the **OK** button to submit a new request in the system. Alternatively, you can cancel this request with the **Cancel** button. In this case, the new request will **not** be submitted and all entered information will be permanently lost.

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 <u>New Request dialog</u>, 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

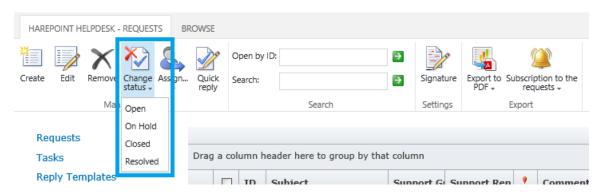
This button is only available when **one or more** requests are marked in the list of requests with a checkbox, or when viewing a request.

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.

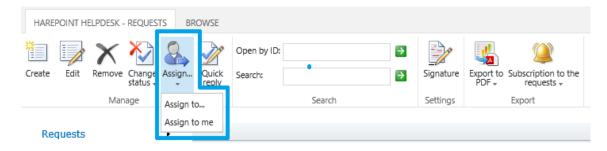


This dropdown list allows you to choose a new status for the request.

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.

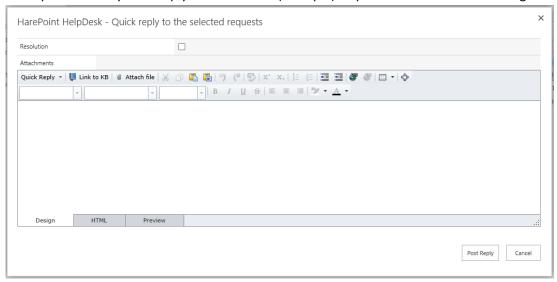
In case if **both** Category and Product auto-assignments trigger, the Product-based auto-assignment will prevail. This behavior can be changed by the HelpDesk Administrator.

Quick reply

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

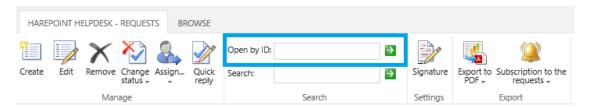


This option allows you to reply to all selected (multiple) requests with the same message:



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 Search ✓ Requests ✓ Users Requests ID: 2 - Purchase and Licensing Priority: Low | Status: Open Currently evalulating your Active Directory Self service product. We have 2 productions fr... 🚃 🞑 | Created: 3/28/2012 9:15 PM | Support Rep: 📹 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: Support Rep: Page 1 of 169 (845 items) 167 168 169 3 (>) Users Sanva Test

How to create a complex search query:

Mobile Number: N/A | E-Mail:

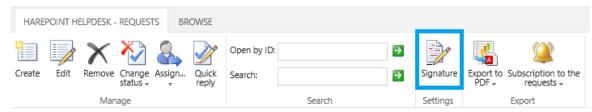
- a) AND and OR cannot be used! You should use + and <spacebar> instead of them respectively.
- b) If you need to find a request that contains both words not necessarily next to each other, use word1+word2
- c) If you need to find a request that contains any of the words, use word1 word2

View User Requests

- d) 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").
- e) 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.

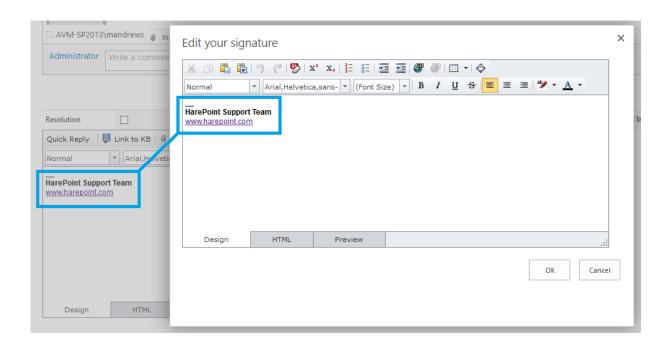
Note: The search is performed only for the **Subject** field, and for **the first message** of the request (**Description** field). All following comments from Technicians or from Users are **not included** in the search. **Internal comments** for Technicians are **not covered** by the search either.

Signature



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.

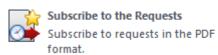


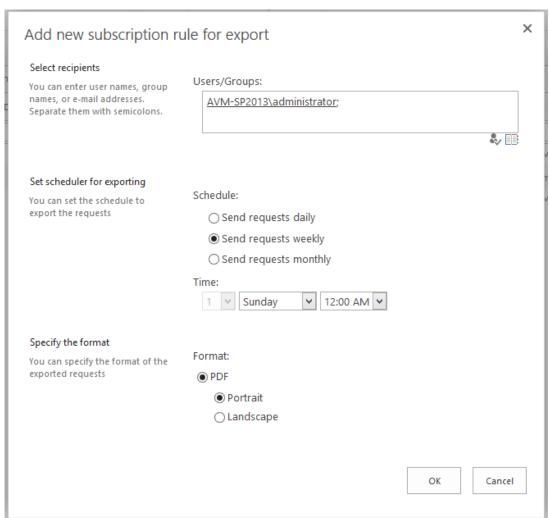
It is possible to export the selected request(s) to PDF in portrait or landscape orientation.

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:



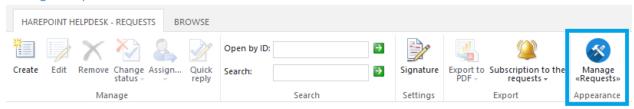


Important note: only **newly created** requests within the selected period will be included in the exporting! Requests that were created earlier but had new replies within that period will **not** be included!



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

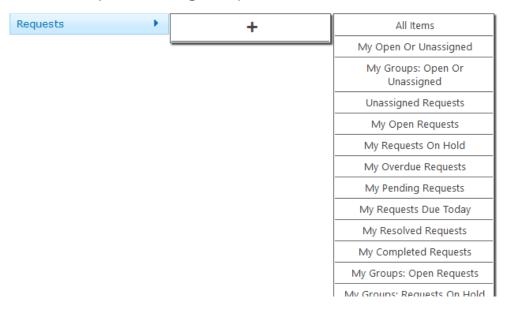
Manage "Requests"



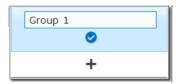
It is possible to create cascaded menus for **Requests** drop-down. (More information on "Requests" menu item can be read here).

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):



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

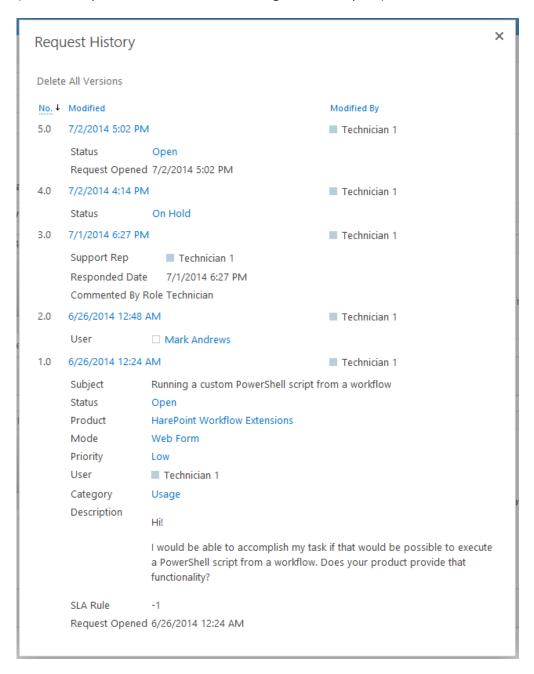
Click Save to apply changes.

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).

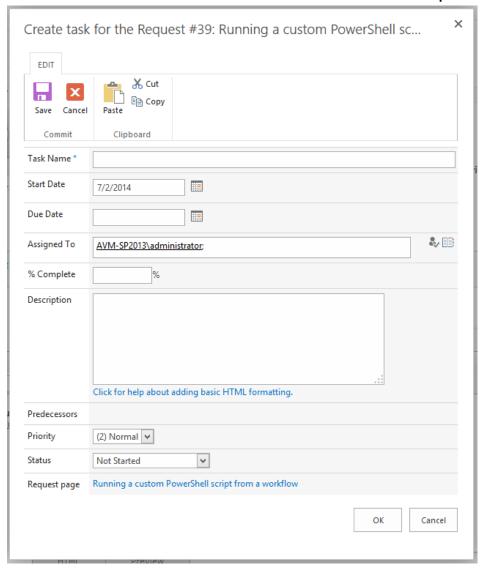


Create Task

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:



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.

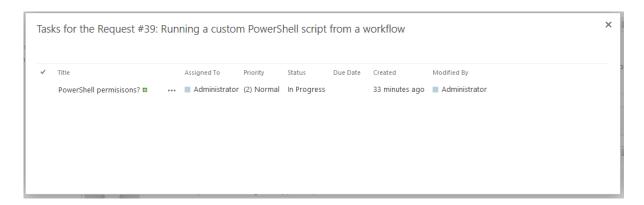
As soon as the task is created, the status of the request changes from **Open** to **On Hold**. When the task is completed, the status of the request changes back to **Open**.

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 <u>Menu</u> – Tasks).



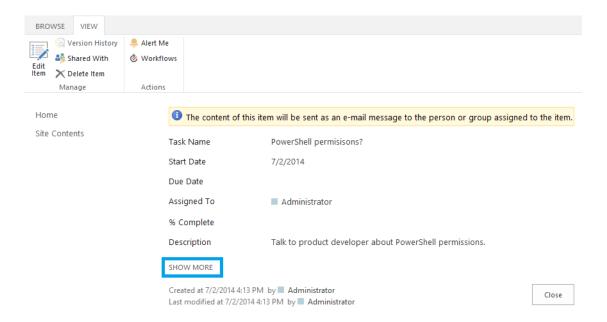
If there are active tasks associated with this request, the number of them is indicated on the button:



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.

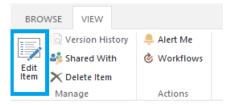
Click on the **Title** of the task to view the information about the task.

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

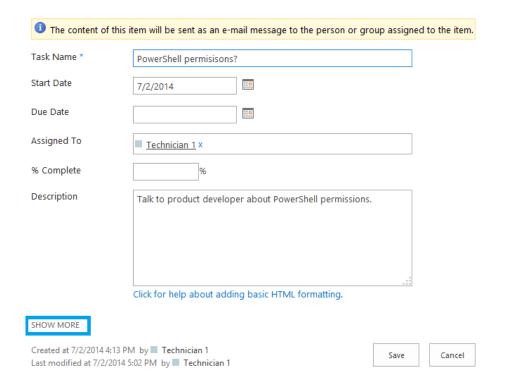


Edit tasks

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

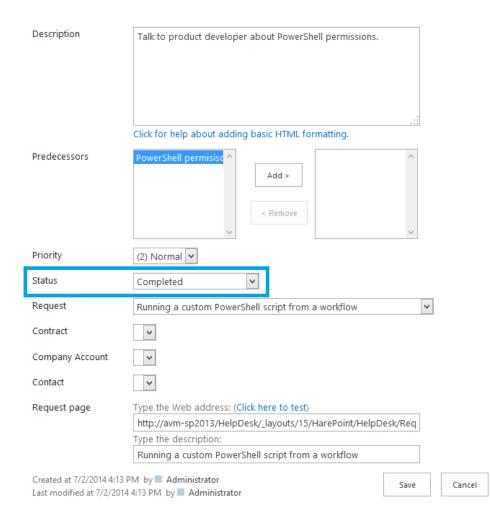


The Edit Task form will open:

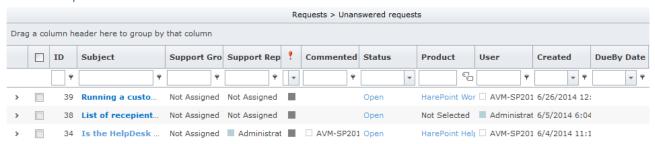


Note: Use the Show More link (only for SharePoint 2019/2016/2013) to see all the fields.

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



List of Requests

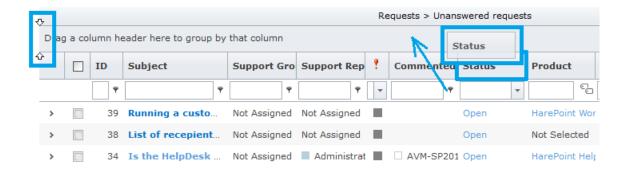


User requests are displayed in the **List of Requests**. By default, the **Unanswered request** view appears when the page is first loaded, so **only the requests that have not been answered** by Technicians are displayed in the list. Use the **Requests** menu item in the left **Menu** to choose other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

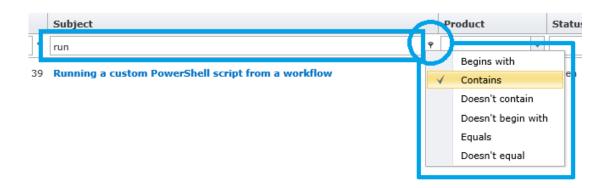
Note: Typically, **Due By Dates** are **calculated automatically** based on **SLA** (*Service Level Agreement*) **rules** that are managed by the HelpDesk Administrator.

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:

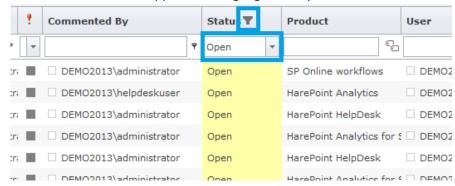


Note: These adjustments are stored by the browser and can be reset inadvertently e.g. by cleaning browser cache.

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



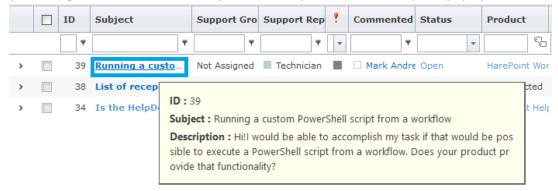
Fields where the filter is applied, are highlighted in yellow and marked with Ticon:



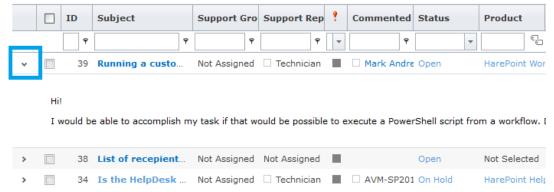
Note: filter settings are saved for the given view, and will be applied next time when you open this view.

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:



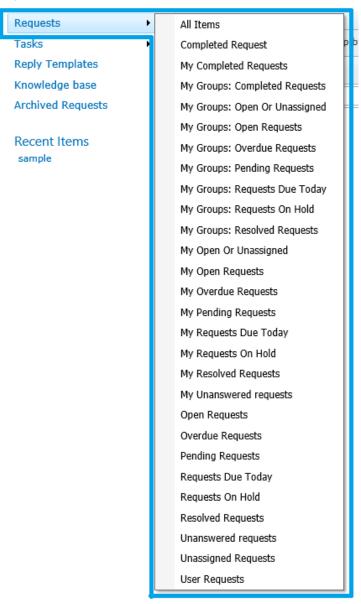
• By clicking the icon in the request line:



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 <u>View archived requests</u> 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*

Technician Console | HarePoint.Com

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

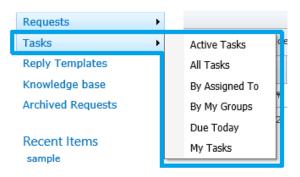
All requests that were not assigned yet

^{*}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 <u>Create Task</u> and <u>View Tasks</u> 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

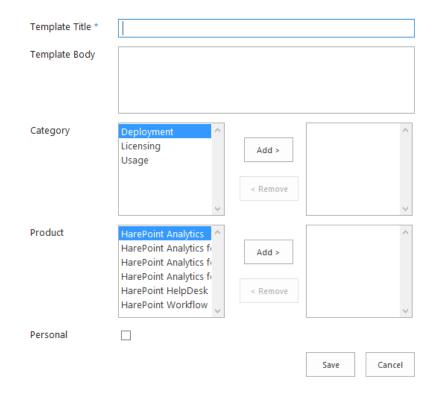
A link to the list of **Quick Reply** templates.

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:



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).

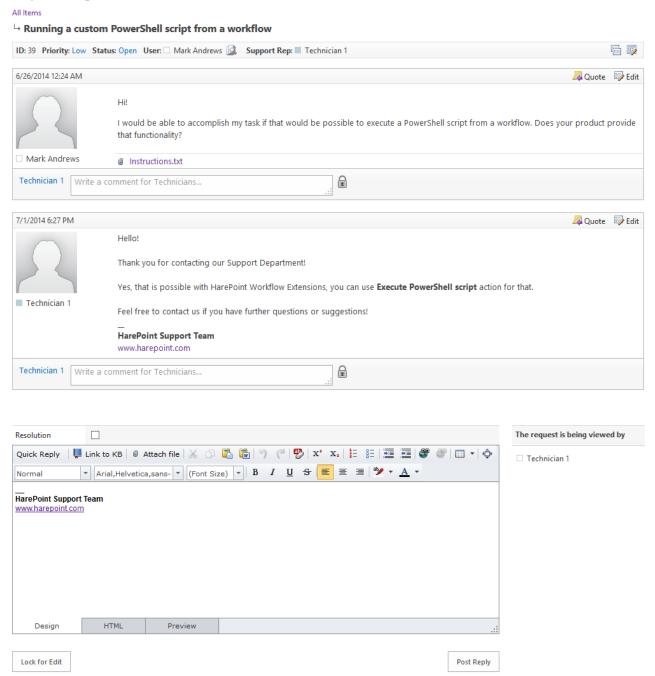
Old or closed requests can be moved to Archive automatically (by schedule) or manually. They can be easily viewed and restored, if necessary.

See Archived requests section for more details.

Recent Items

This section contains links to recently viewed requests.

Request Page



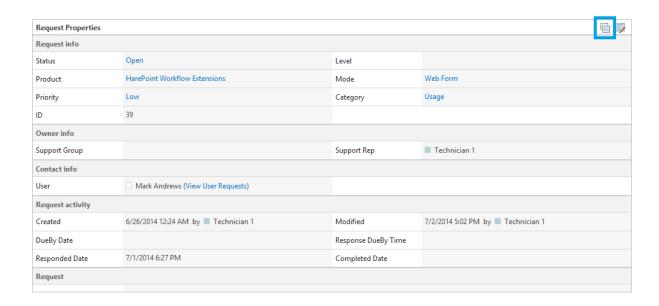
Information Bar and Request Properties table



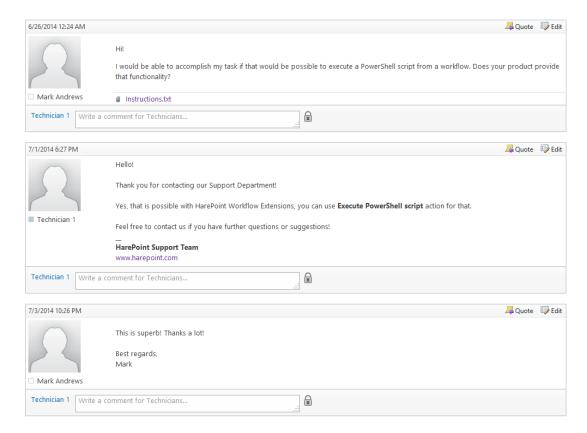
The **Information Bar** provides brief information about the request. In order to view all the details concerning the request, click on the free space on the bar, or use the corresponding button to **expand** the Information bar into the **Request Properties table**.

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.



Messages



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:



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.

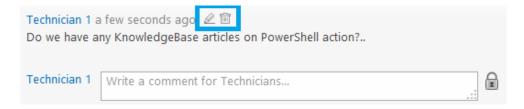
Internal comments for Technicians

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 ::

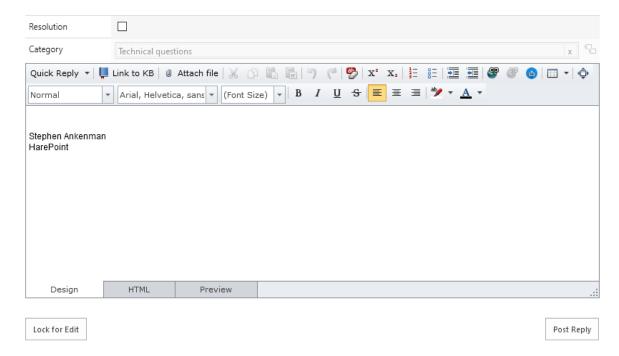


When the comment is added, it can be modified or removed by technician who added it:



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

New message form

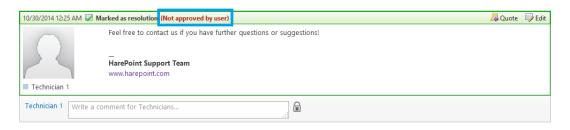


The main part of the Form is a **text field**. HTML text formatting is supported.

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.

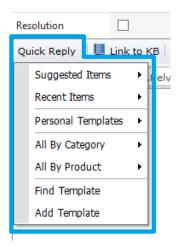
Quick Category change (if enabled by a HelpDesk Administrator)

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.

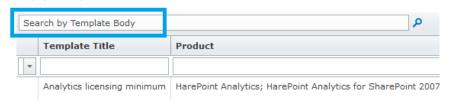
Personal Templates – displays your personal templates only.

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.

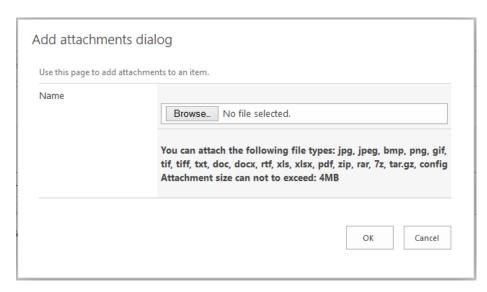
Link to KB

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 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 unlocks the request.

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.

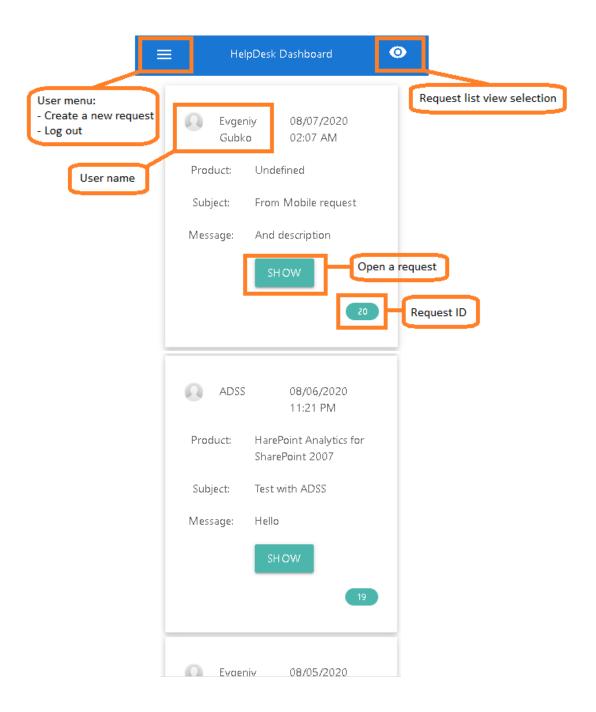
Note: All you need to access a Mobile version of the site is just a **browser** on a mobile device. There is no special mobile application that needs to be installed on a device for that purpose.

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.

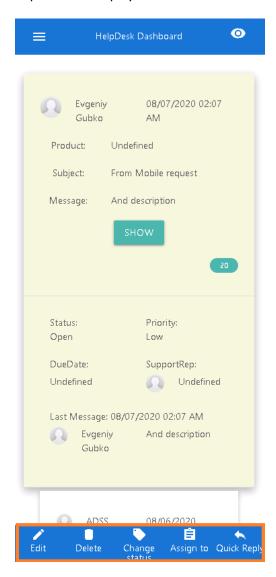
To **create a new request**, or to **log out**, use the menu button in the top left corner.



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

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

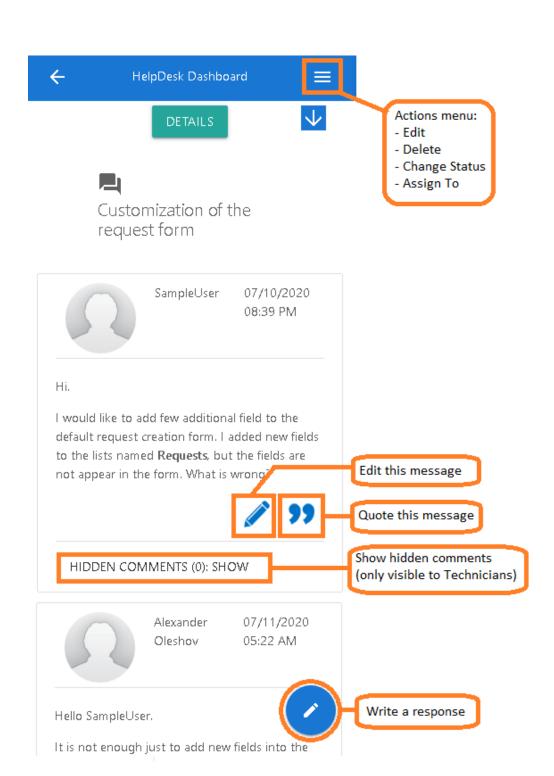
The options are displayed at the bottom bar:



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
- Compose a new message button

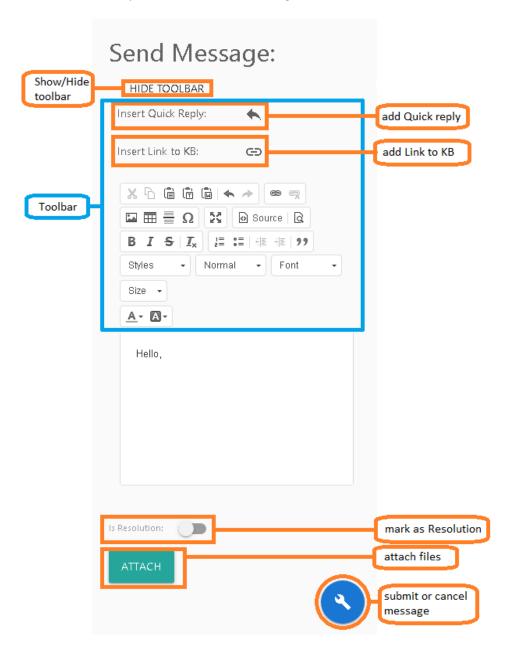


Composing a new message

When composing a new message, you can expand a **toolbar** with various text editing options, as well as buttons to **insert a Quick Reply** and to **insert a link to Knowledgebase article**.

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

With button you can **submit** the message, or **cancel** it and return back to viewing a request.



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:



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

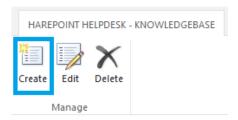
Technicians and Viewers can access the Knowledge Base at any time using the Knowledge Base link in the Menu (see Menu - Knowledgebase for details).

Viewers can only read articles.

Create, Edit or Delete article

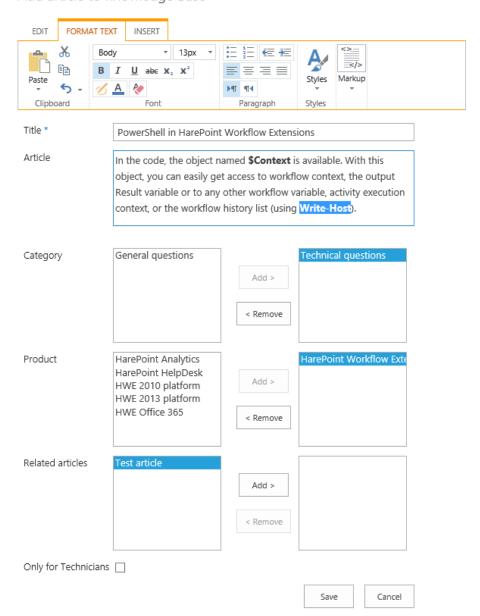
The ribbon contains the following buttons:

Create



A form for a new article is displayed:

Add article to Knowledge Base



> 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.

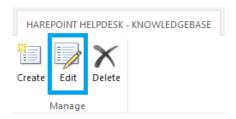
Only for Technicians

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.

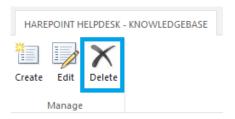


A form to edit an existing article is displayed.

This form is identical to a form for a new article (see above).

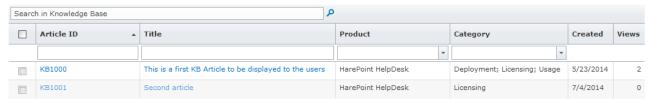
• Delete

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



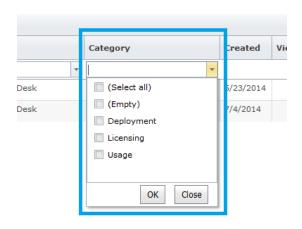
The selected articles are deleted permanently! Users will not be able to access these articles using the links that were given earlier by technicians.

List of Knowledge Base articles



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.

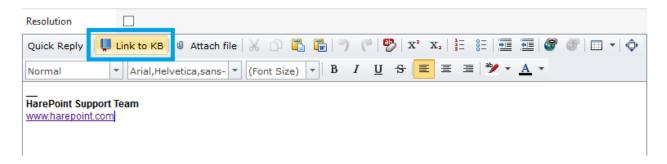
To **find articles**, technicians can use the **Search in Knowledge Base** field above the list, or use **filters** that are available for most columns of the list:





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 <u>Sections of Request Page</u> 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



 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 <u>Create, Edit or Delete KB article</u> 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.

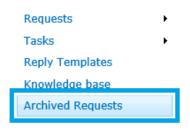
Requests in archive contain all the attachments, hidden comments and requests history.

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.

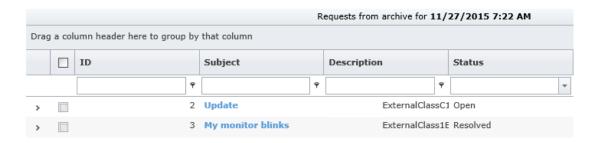
View archived requests

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.



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:



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

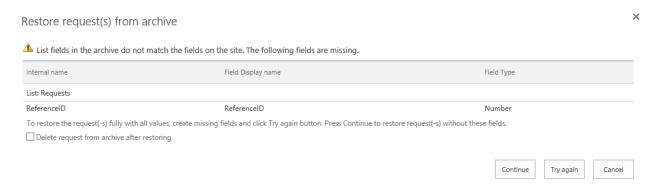
Note: this option requires a specific permission – contact your HelpDesk Administrator if it's not available.

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:



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 is 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**:

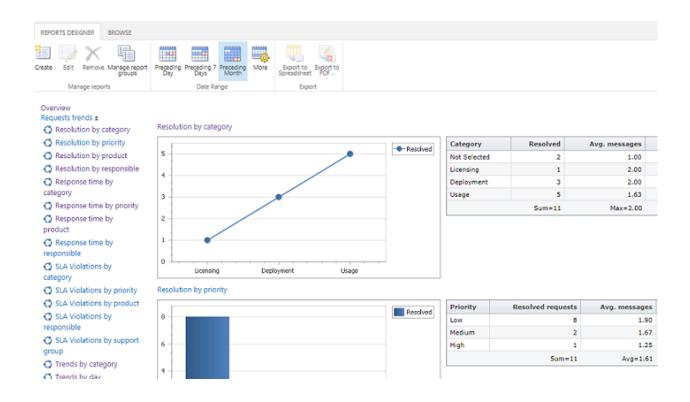
Ungrouped reports ±

SLA Violations by category

SLA Violations by priority

SLA Violations by product

An **Overview** page displays four reports:



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



Resolution by responsible

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

- Private report (only visible to its author) åå
 - 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



Date Range

O

go to new report creation page

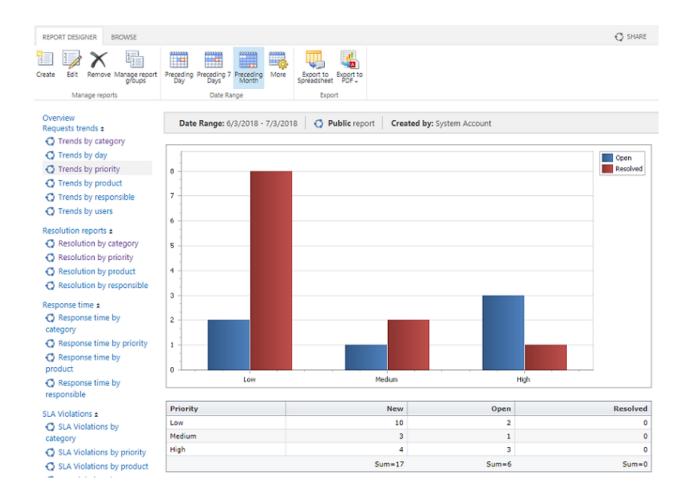


Create

manage report groups

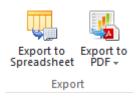


Click on report name in the left pane, to view the report in full details:



Exporting reports

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



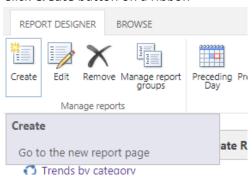
Creating, Editing and Removing reports

Creating a new report

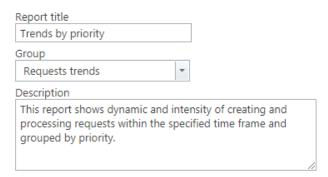
Note: since Reports Designer provides a flexible permission management, you need to have sufficient permissions to be able to create a new report. For more details, consult your HelpDesk Administrator or refer to **Reports Designer - Permissions Management** paragraph in **Administrator Guide**.

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:



• 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)

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

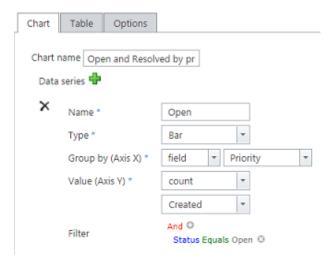
Go to Chart tab.

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**:



A fields set will appear:

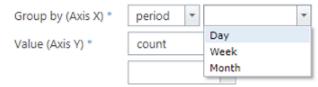


- 1. Specify the series Name
- 2. Specify the chart **Type**. The available types are: *Bar, Stacked Bar, Line, Spline, Pie, Point* For instructions on creating a Stacked Bar refer to <u>next paragraph</u>.

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:



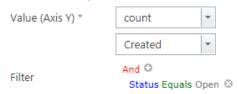
Note: If you have two series on a chart, both of them need to be grouped by the same parameter (have the same selection for axis X)!

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 :



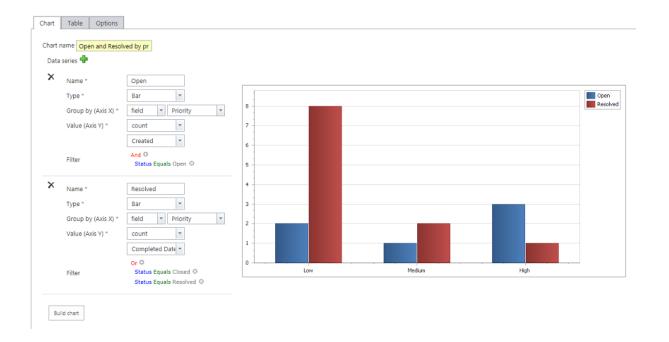
Average number of comments in closed tickets:



Maximum resolution waiting time:



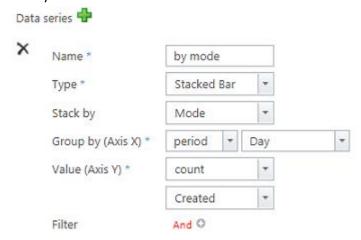
5. When all the required fields are filled, click **Build Chart** button to build a chart preview:



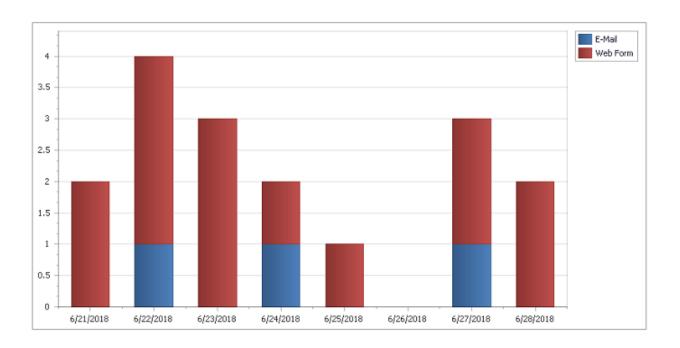
Creating a Stacked Bar chart

A Stacked Bar can be created in two ways:

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:



The result would be:



2. Specify two data series with identical axis Y parameter.

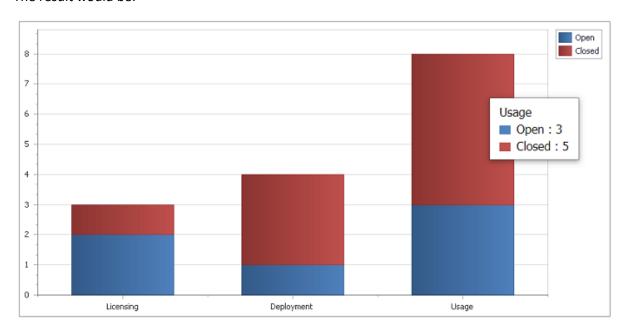
Example: the chart needs to display requests by categories, also indicating ratio between open and closed requests for each category.

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**.



The result would be:



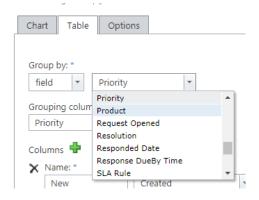
Creating a table

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):



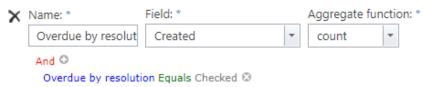
To add columns, click on "+" next to Columns. Up to 5 columns can be added.
 Specify the name for the column header (Name), Field based on which this column will display data,
 Aggregation function, and Filter (optional).

Examples:

> Number of open requests:



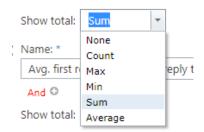
> Number of **overdue by resolution** requests:



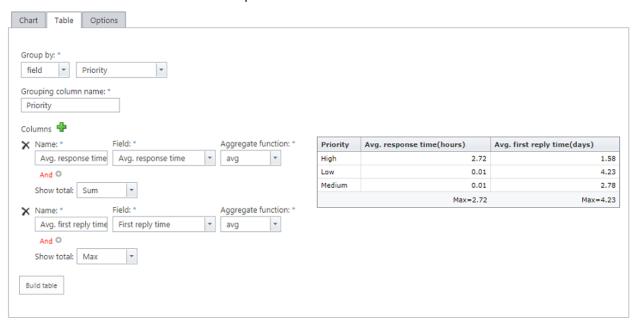
Average first reply time:



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.



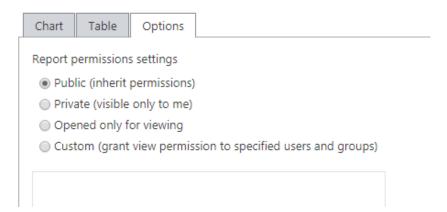
Report Options

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.



• 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

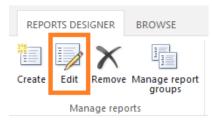
Only the specified user accounts or groups will have access to the report. No other users will be able to view this report.

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:



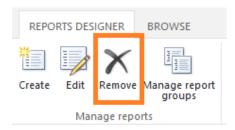
• Edit report parameters as necessary. Refer to <u>Creating a new report</u> paragraph for more details on each parameter.

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 <u>Reports Designer</u> 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
 In SharePoint 2010: click
 Site Actions ▼ - Site Settings

In HarePoint HelpDesk for SharePoint section click Reports dashboard link.

HarePoint HelpDesk for SharePoint Requests Reports designer Built-in reports 3ettings About

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:



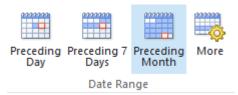
HelpDesk Test

HarePoint HelpDesk - Overview [®]





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:

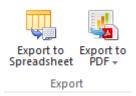


The information in tables in the reports can be **sorted** by ascending or descending order, by clicking on the header.

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**.

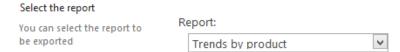
It is possible to **subscribe to reports** to receive them by e-mail according to a schedule using the button on the ribbon:



Subscribe to the Report



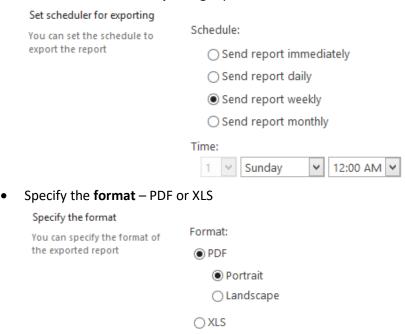
Select the report in the drop-down list (the currently viewed report is selected by default)



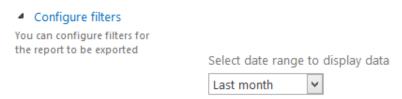
Select recipients (the currently logged in Technician is added by default)



• Set the schedule for exporting reports



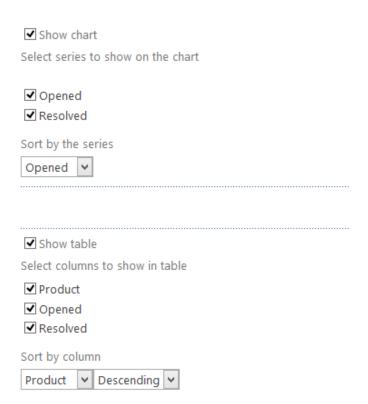
• Expand Configure filters and select the date range for the data in the reports



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!

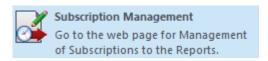
- Expand **Define view for the report** and adjust the view of the report, if necessary.
 - Define view for the report

You can define views of the exported report



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.