10/10/2017

ServiceDesk (SD) Screens

New Screens for required flows

Robin Toy STROBE TECHNOLOGIES LTD



Contents

Comodo Communication Client Ticket Submit
Current View2
New View2
Notes on New View2
Support Agent Client Ticket Submit (Via SD Website)
Current View
New View
Notes on New View4
Update / Process Ticket (Agent via SD Website)5
Current View
New View5
Notes on New View5
Support Agent Ticket Update via Reply7
Current View
New View7
Notes on New View
Support Agent Ticket Update via Internal Note10
Current View
New View
Notes on New View11
ServiceDesk Ticket View12
Current View
New View
Notes on New View12



Comodo Communication Client Ticket Submit

Current View

COMODO Client - Communication Submit ticket
Please fill in the fields below and describe details of your issue:
Issue Summary
Required (max. 100 chars)
Department
Support Department 👻
Priority Level
Normal
Issue Details
Required (max. 5000 chars)
Include device data (brand, model, serial number, logged on user, domain/workgroup)
Note: Company, Device Name and Owner are included by default.
Submit Cancel

Filename:

2017-10-09_CCC-Report-Ticket_CURRENT.png

New View

COMODO Client - Communication Submit ticket
Please fill in the fields below and describe details of your issue:
Issue Summary
Required (max. 100 chars)
Department
Support Department 👻
Priority Level
Normal
Name
Required
Email Address
Required
Issue Details
Required (max. 5000 chars)
Ticked by default
Include device data (brand, model, serial number, logged on user, domain/workgroup)
Note: Company, Device Name are included by default.
Submit Cancel

Filename: 2017-10-09_CCC-Report-Ticket_NEW.png

Notes on New View

On a visual front the changes are simple, adding in a name and email address field as this allows better reporting as the owner of the machine is never the reporter. This is the details the ticket should be logged under, not the owner information.

By default, the tick box to include additional information should be included.

And the note at the bottom does not need to specify the owner information as this is not important.



Support Agent Client Ticket Submit (Via SD Website)

Current View

	DASHB	OARD APPLICATIONS	MANAGEMENT S	TORE	TOOLS		🗲 Quick Actions 🗸	Becor	ne a Partner	= Ö Quick Start	<u>v3.15.1</u>	<mark>8</mark>	0 ~	Robin
Service Desk	Â	≡ <u>Comodo One</u> > <u>Se</u>	rvice Desk > Tickets >	New T	ſicket	^								
	>	Open New	Lookup or creat	e a u	ser			×						
	>	opennen	Search existing us	sers or	add a new user.									
TICKETS	~	New Ticket	Search by email, ph	one or	r name									
New Ticket Open (11) Answered (16)		User Inforn	Create New Use	er:										
Unassigned (4) My Tickets (12)		Email Addres: Full Name: *	Full Name: *											
Overdue (9) Closed (11,390) Paused (0)		Ticket Notice:	Phone Number: Internal Notes:				Ext:							
Materials		Ticket Info												
KNOWLEDGEBASE	>	Ticket Source Help Topic: *											• •	
MY TIME SHEETS	>	Department:			Ca	ancel	Reset	d User					•	
	Ţ	SLA Plan:	Default	SLA (120 hrs - Active)								¥	

Filename:

2017-10-09	SD-Re	port-Ticket	CURRENT.png

New View

	DASH	BOARD AP	PPLICATIONS	MANAGEMENT	STORE	TOOLS		Quick Actions ~	Secome a Partner	= Ö Quick Start	<u>v3.15.1</u>	<mark>8</mark>	0~	Robir
Service Desk	ĺ	■ <u>Com</u>		ice Desk > Ticket		Ticket	^							
	>	0	n Mary Ti	aleat										
	>	Oper	n New Ti	ICKET										
TICKETS	~	New	/ Ticket											
New Ticket														
Open (11)		Us	ser Informati	on:										
Answered (16)		Em	nail Address: *											
Unassigned (4)			Hun Address.											
My Tickets (12)		Ful	II Name: *											
Overdue (9)		Pho	one Number:				Ext:							
Closed (11,390)		Tic	cket Notice:	Ser	nd alert to	o user.								
Paused (0)				_										
Materials		Tie	cket Informa	tion & Options	:									
KNOWLEDGEBASE	>	Tic	cket Source: *	Pho	ne								٣	
MY TIME SHEETS	>	He	elp Topic: *	— s	elect Hel	р Торіс —							•	
CALENDARS		De	epartment:	Sup	port								•	
		SL	A Plan:	Def	ault SLA ((120 hrs - Active)						٠	



2017-10-09_SD-Report-Ticket_NEW.png



Notes on New View

When you open a ticket the initial pop up is a waste of time as by clicking cancel you have a fully working good form that simply needs the telephone and extension fields adding as shown.

This speeds up access, account creation as well as allowing the customer to fire straight into the issue and collect their details once they have it off their chest. As we know a customer with a computer issue does not care about hello my name is and I'm on PC X, they just want to throw the problem at you and force you to work backwards.



Update / Process Ticket (Agent via SD Website)

Current View

Does not exist yet

New View <u>сомодо оле</u> 🗲 Quick Actions 🗸 🦃 Become a Partner 🕫 Quick Start 🛛 🔥 💿 🗸 Robin To DASHBOARD APPLICATIONS MANAGEMENT STORE TOOLS Service Desk **Open Tickets** Show 25 records 🔹 Customize Columns 0 📑 Close 👘 Delete 🥕 Assign 📑 Process Export to CSV Search. New Ticket Open (7) LAST UPDATE DATE \$ ASSIGNED TO \$ TICKET \$ SUBJECT \$ FROM \$ PRIORITY \$ DEVICE NAME \$ ORGANIZATION \$ Answered (13) Unassigned (2) 03-10-2017 10:34 am Move to Office 365 **11653** High Chris My Tickets (10) Overdue (10) **⊠** <u>11706</u> 27-09-2017 8:35 am FW: Chells Robin Norma Closed (11.348) Paused (0) <mark>⊠ <u>11811</u></mark> 27-09-2017 3:15 pm transfer of licences Norma Chris Materials **\$** 11884 03-10-2017 1:45 pm Malware EXE found on servers High Nathan KNOWLEDGEBASE 1 MY TIME SHEETS <u>11894</u> 04-10-2017 9:09 am Disk Monitoring MONITORING ... F6B3T4J Chris Norma ✓ <u>11898</u> 04-10-2017 9:55 am exact workflow Normal Filename:

2017-10-09_SD-Verify-Update-Data-TicketList_NEW.png

	DASHE	BOARD	APPLICATIONS	MANAGEMENT	STORE	TOOLS		🗲 Quick Actions 🗸	Become a Partner	=Ö Quick Start	<u>v3.15.1</u>	3	0~	Rob
Service Desk	ŕ						^							
	>		onoto											
QUSERS	>	ι	Jpdate Ticket #	8742		* No not * Displa	tes section ys initail report n	following changes: - nessage / body at botton ready for a technician	ı (not editalble) so you can j	judge				
	~						to add colabora							
New Ticket			User Informat	ion: Currently s	elected	user								
Open (11)			User:					Change						
Answered (16) Unassigned (4)														
My Tickets (12)														
Overdue (9)			Ticket Inform	ation: Due date	overrid	es SLA's grace p	eriod.							
Closed (11,390)			Ticket Source: *	En	nail								٠	
Paused (0)			Help Topic:	- :	Select He	Ір Торіс —							•	
Materials			Department:	Su	pport								•	
KNOWLEDGEBASE	>		SLA Plan:			(120 hrs - Active)							Ŧ	
T MY TIME SHEETS	>					(120 IIIS - Active)							•	
CALENDARS			Time Spent:	0 hrs	2 min									
5 CALENDARS			Due Date:	10-	07-2017	10 ▼		Time is based on your t (GMT+1.00)	time zone					
								(0001+1.00)						

Filename: 2017-10-09_SD-Verify-Update-Data-TicketData_NEW.png

Notes on New View

The first screen shows an added "process" button to the list which should allow you to select a ticket and start the process / update function.



The second screen is the actual screen used to process / update the base ticket information allowing a technician to be able to pick up the job and run with it.

The screen is the same as the edit screen with a couple of differences: -

- The notes section at the bottom is not needed as the original / changes should be auto placed in an internal note so the information is not lost.
- There needs to be a preview box of the actual message raised so the updating agent can categorise, change the subject and priorities as correctly depending on the information provided.



Support Agent Ticket Update via Reply

Current View

Service Desk										
DASHBOARD	>	Ticket #8742		00:03	3:28 🚺 🔵 🔳	Add Material	🕼 Edit	X Close	🗎 Delete	More 🗸
	>									
TICKETS	~	Post Reply	Post Internal Note	Dept. Transfer	Reassign Ticke	t				
New Ticket		то:								
Open (8) Answered (18)			Add CC							
Unassigned (3)		Collaborators:	Recipients (1 of 1)							
My Tickets (11)			Select a canned resp	onse					Ŧ	
Overdue (9) Closed (11,399)			<> ¶ Aa B	IUAU	5 III II 7		⊞ ∞	= - í	4	
Paused (0)				onse here. Use canned r				(9	
Materials			otare mining your roop	onde nere. ode danned n		00000				
KNOWLEDGEBASE	>	Response: *								
MY TIME SHEETS	>									
			Kind Regards							
PROJECTS			Support Department							
			Strobe Technologies Ltd t: <u>01884 664004</u> e: helpdesk@strobe-it.co							
ADMIN PANEL		Attachments:	Choose File No file cl	hosen						
		Signature:	🔍 None 🖲 Dept. Signati	ure (Support)						
		Ticket Status:	Close on Reply							
		Post Reply	Reset							

Filename:

2017-10-09_SD-Update-Ticket-Reply_CURRENT.png

New View

Service Desk		<u>Comodo One</u> > <u>Service Desk</u> → Tickets > Open
DASHBOARD	>	Schedule Add Material C Edit X Close Delete More -
Q USERS	>	Post Reply Post Internal Note Dept. Transfer Reassign Ticket
	~	
New Ticket Open (8) Scheduled (2) Answered (18)		TO: To: Add CC
Unassigned (3) My Tickets (11)		Collaborators: Recipients (1 of 1) Select a canned response
Overdue (9) Closed (11,399) Paused (0) Materials		
MY TIME SHEETS	>	Response: * Kind Regards Support Department Strobe Technologies Ltd 1.01884-664004
PROJECTS		e: helpdesk@strobe-it.co.uk
ADMIN PANEL		Time Spent: 00:03:28 Time Type: Telephone Time Type: Telephone Attachments: Choose File No file choose Signature: None None Dept. Signature (Support) Ticket Status: Close on Reply Post Reply Reset

Filename: 2017-10-09_SD-Update-Ticket-Reply_NEW.png



Notes on New View

There are a lot of changes here so I will list them with reasons / explanations: -

(See https://www.strobe-it.co.uk/services/opensource/ for our popular osTicket mod)

Timer

The biggest change is the timer and how the time is recorded to a job, this is due to real world situations and needing to prove / provide information to why you have charged or done what you have done; as well as charge more efficiently.

The time should no longer be part of the ticket and the ticket MySQL table but the thread MSQL table, this basically means time is added to a thread in the same way communication / updates are.

So, when you are working on a job, making notes as you got for the end client in the replies box the timer is ticking. After the section of work, you publish the reply/update which also saves the time for that update include the location stored in Time Type and if it is billable or not.

When you look back through a job you can see what you have done, how long that part took you and answer questions to what actually was done for the time logged quickly instead of trying to jog memories or try and match up thread updates with published time.

Time Type

In the MSP world, generally you have different pricing brackets depending on the style of work you performed, for instance you might charge £1 per minute for remote support compared with a callout fee of £40 followed by £1 per minute for visiting a client's site.

Some MSP's also as part of a contract with a client might provide so many minutes / hours on-site per month and above that bill the difference. By recording this information, you can then prove what you have done and bill accordingly.

Time Type should be a customisable list allowing each MSP to categorise their company as they see fit, but for example our types are: -

- Remote
- Telephone
- On-Site
- Workshop



Billing

A simple change which speeds up posting, stops non-required save work pop-ups etc. If you need to leave a ticket the time and currently typed information should be saved in drafts allowing a technician to freely jump to answer the phone without risk of losing this information.

Record Time Button

Not needed as recording time is done via posting a reply.

Schedule Button

With a ticket you might have to schedule a job, especially for site visits or work on servers etc....

So to do this adding a schedule button which opens the calendar in a pop up allowing you to choose either the shared calendar, yours or another member of staffs (assigns ticket to them if this is done?) to place the job at the scheduled time.

Once a job is scheduled it should no longer appear in the open or answered views / queues but to a newly created queue called "scheduled" as shown in the left menu.

Scheduled List / View

This view is to see the list of scheduled jobs you company / agents have allowing you to access, edit etc these jobs.

Once a schedule is due the ticket should then appear in the open tickets as it is now awaiting work via the agent as scheduled.



Support Agent Ticket Update via Internal Note

Current View

Service Desk				<u>^</u>					
DASHBOARD	>								
	>								
TICKETS	~	Warning! Marked overde	ue!						×
New Ticket Open (8)		Ticket #8742		00:26	:13 🚺 🔵 🔳 🗛 dd 1	Material 🕼 Edit	× Close	💼 Delete	More -
Answered (18) Unassigned (3) My Tickets (11)		Post Reply	Post Internal Note	Dept. Transfer	Reassign Ticket				
Overdue (9) Closed (11,399) Paused (0) Materials		Note Title:	Summary of the note (opt	ional)					
	>		<> ¶ Aa B Note details	IUAN		■ > = ∞	-		
T MY TIME SHEETS	>	Internal Note: *							
PROJECTS									
		Attachments:	Choose File No file ch	osen					
ADMIN PANEL		Ticket Status:	- unchanged -				•		
		Post Note	Reset						

Filename:

2017-10-09_SD-Update-Ticket-Note_CURRENT.png

New View

Service Desk		E Comodo One > Service Desk > Tickets > Open				
DASHBOARD	>					
	>					
	~	Warning! Marked overdue!				×
New Ticket Open (8) Scheduled (2) Answered (18)		Ticket #8742 Schedule Add N	Material 🕼	Edit X Close	🗎 Delete 🛛 M	lore 🗸
Unassigned (3) My Tickets (11)		Post Reply Post Internal Note Dept. Transfer Reassign Ticket				
Overdue (9) Closed (11,399) Paused (0) Materials		Note Title: Summary of the note (optional)	a > #	∞ ₹ — ₫	ð	
MY TIME SHEETS	>	Note details Internal Note: *				
		Time Spent: 00:03:28				
PROJECTS		Time Type: Telephone Biliable? Attachments: Choose File No file chosen				
ADMIN PANEL		Ticket Status: - unchanged -			*	
		Post Note				

Filename: 2017-10-09_SD-Update-Ticket-Note_NEW.png



Notes on New View

This is the same as posting a reply, but instead you are posting an internal note with time and possible charges instead.

This is extremely useful as it allows you to perform research, post this information to the ticket and record how long you spend doing this research.

There are many other reasons, but this is a huge one for MSPs.

For more details on the screen please see "Posting a Reply".



ServiceDesk Ticket View

Current View

Service Desk	Â	⊂ <u>Comodo One</u> > <u>Service Desk</u> > Tickets > Open
DASHBOARD	>	Tue, Sep <u>12 2017 9</u> :27 am Ticket Updated Nathan Davies
QUSERS	>	Changing title from FWD: Various
TICKETS	~	Fri, Sep 29 2017 3:02 pm Ticket Marked Overdue SYSTEM
New Ticket	_	Ticket flagged as overdue by the system.
Open (9) Answered (17)		Thu, Oct <u>5 2017 11</u> :41 am Nathan Davies
Unassigned (2) My Tickets (12)		These quotes have expired now, so if you would like to talk about getting some more quotes together let me know. But if you would rather wait a little bit just give us an email in the future when you want some quotes put together.
Overdue (9) Closed (11,401)		Thanks, Nathan.
Paused (0) Materials		Thu, Oct 5 2017 1:34 pm Sue Snow
KNOWLEDGEBASE	>	î
MY TIME SHEETS	>	Sorry, Nathan. And yes some up to date prices please.
	•	

Filename: 2017-10-09_SD-Ticket-View_CURRENT.png

New View

Service Desk			omodo One > Service Desk > Tickets > Open		
DASHBOARD	>		Tue, Sep 12 2017 9:27 am Ticket Updated <internal note="" subject=""></internal>	5 Minutes - Workshop	Nathan Davies
	>		Changing title from FWD: Various		
	~		Fri, Sep 29 2017 3:02 pm Ticket Marked Overdue		SYSTEM
New Ticket			Ticket flagged as overdue by the system.		
Open (9)					
Answered (17)			Thu, Oct <u> 5 2017 11</u> :41 am	15 Minutes - Telephone	Nathan Davies
Unassigned (2)			These quotes have expired now, so if you would like to talk about getting son	ne more quotes together let me know. But if you would rather wa	it a little bit just give us an
My Tickets (12)			email in the future when you want some quotes put together.	ie more quotes together fer me know. Dar in you would faither wa	in a finite on just give us an
Overdue (9)			Thanks,		
Closed (11,401)			Nathan.		
Paused (0)					
			Thu, Oct 5 2017 1:34 pm		Customer Name
Materials					
KNOWLEDGEBASE	>				A
MY TIME SHEETS	>				
CALENDARS			Sorry, Nathan. And yes some up to date prices please.		
		-			

Filename: 2017-10-09_SD-Ticket-View_NEW.png

Notes on New View

The ticket view for an MSP agent with the new SD skin designed by Comodo instead of the original osTicket one originally used is very confusing; especially as it is plan and bland with no indication of what each part of the thread is. At the moment you have to perform a PDF export which shows the original colour scheme and layout to make proper sense of a ticket.

To improve this, the new screen shows some colour and additional information as described below: -



- Yellow banners to show internal notes and system events of tickets. This is extremely import so you can tell if certain information or comments went to the end client or not so you know the status of their knowledge.
- Blue banners to show responses from the client.
- Orange banners to show replies sent to the client.
- On internal notes there is already a subject field and this I believe already places itself in the thread banner but if it does not it needs to.
- On internal notes and replies the time and time type needs to be displayed allowing the agent to see what has been done so far, how long it took etc.