

CHRONODAT HELP DESK ADD-IN

# User Manual

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## Introduction

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

## Scope & Objective

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

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

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

## Add-in Overview

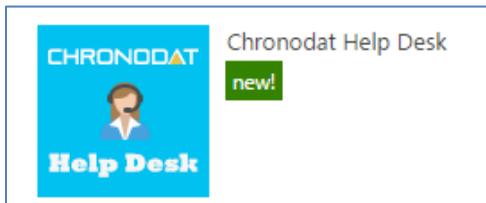
Office 365 Help Desk is a pure SharePoint features wrapped up into an awesome device friendly add-in. Using this add-in your support team can quickly visualize existing support tickets by team, priority, category or age to understand current and overdue support tickets. IT Support Team or Users can submit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

## Features:

- Support requests can be created using a pre-defined request prefix example: "IT-SERV-2016-1".
- Pre-defined **Request Categories** (such as Hardware, Software, etc.), & **Request Sub-Categories** (such as broken monitor, need Microsoft Office installed, etc.), *all configurable according to your business*
- Pre-defined **Resolution Categories**, such as Fixed, Cannot Reproduce, Works as Designed, Canceled, etc., *all configurable according to your business*
- Pre-written Email Templates for notifications sent to the user, *again, configurable according to your business*
- Color-coded, built-in dashboards for quick metrics & reporting, with no configuration needed; there is a **Global Dashboard** for **all requests**, and a **personal Dashboard** for each team member. In both types of Dashboards you see:
  - 10 most recently updated requests, by **Status**
  - Request Status **pie chart** (Active vs. Closed)
  - Request Status **bar chart**, based on **Priority**
  - Request Status **bell curve chart**, based on **Category**
  - Request Status **grid**, based on **Assigned To**
  - 5 most recently updated requests, regardless of Priority or Status
- A Requests Board, with column-based board views, with a drag & drop feature for quickly changing Statuses
- Powerful Search engine to find requests quickly & easily
- Export options, such as Excel, PDF, CSV, and more
- Setup for designating Help Desk Support Contacts
- Help Desk document repository for uploading & storing documents for the Help Desk team to share and use
- A Team Calendar to keep track of system outages, freeze periods in your business, team social events, etc.
- Security is built-in, and user access is very customizable.

# Configuring Chronodat Help Desk Add-in

1. Click Chronodat Help Desk.



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

A screenshot of the 'Welcome to Chronodat Help Desk!' page. The page has a blue header bar. Below it, there is a large text area with the heading 'Welcome to Chronodat Help Desk!'. It contains two paragraphs of text about the add-in's features and integration with Office 365 SharePoint Online. At the bottom of this section, there is a red button labeled 'Add-in Settings' and two smaller buttons labeled 'User Manual' and 'Video Demo'. A note at the bottom states: 'Note: This add-in is compatible with IE10 and upper version and latest version of Chrome &amp; Firefox.'

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

A screenshot of the 'Chronodat Service Desk' Global Dashboard. The dashboard has a light gray header with the title 'Chronodat Service Desk' and 'Global Dashboard'. Below the header, there is a button labeled 'Help Desk Global Dashboard' with a chart icon.

- o Select who can access the Dashboard.

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

**App Settings** Manage settings

Click each tab below, and review the General and Email Notification specifications.

Available fields for each 'Notification' tab:

RequestID, Title, LinkTitle, RequestStatus, Priority, AssignedTo, Resolution, RequestCategory, RequestSubCategory, CreatedBy, Created, ModifiedBy, Modified.

General	Open Email Notification	In Progress Email Notification	Resolved Email Notification	Reopened Email Notification	Assigned To Email Notification
<b>App Name:</b> Chronodat Service Desk <b>Ticket ID (Prefix):</b> IT-SERVICE 2016 <b>Dashboard access granted to:</b> Developer Site Owners <b>Name of Support Manager:</b> Anuradha Edla					

All tabs reviewed

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

General	Open Email Notification	In Progress Email Notification	Resolved Email Notification	Reopened Email Notification	Assigned To Email Notification
<b>Enable/Disable Email Notification:</b> <input checked="" type="button"/> On <b>Email Subject template for Request Confirmation to requestor:</b> Chronodat Help Desk - Request {RequestID} has been submitted. <b>Email Body template for Request Confirmation to requestor:</b> Confirmation Notification: Request {RequestID} has been submitted Requested For: [RequestedFor] Requested By: [CreatedBy]					

All tabs reviewed

5. When finished, click the next tab in sequence. This tab is very similar, but it's for the email that the user sees when the request has moved to **In Progress**.
  - Again, you can turn it off by clicking **Disable**.
  - Configure the subject line in this field. Remember you can use the available fields in the blue bar above.

**CHRONODAT**

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

The screenshot shows the CHRONODAT Help Desk interface. The left sidebar has a dark theme with white text. It includes a logo, the title "CHRONODAT Help Desk", and sections for "GLOBAL NAVIGATION" and "CURRENT USER NAVIGATION". Under "GLOBAL NAVIGATION", "All Requests" is highlighted with a blue background. Under "CURRENT USER NAVIGATION", "My Requests" is also highlighted. The main content area has a light gray background. At the top, there's a blue bar with the text "Create new Request". Below it, the title "Request Categories" is displayed along with a "Manage Categories" link. A sub-section titled "Add New/Edit Category" is shown. Below that, a heading "+ new item or edit this list" is followed by a table with columns for "Title" and "...". The table lists several categories: "Hardware", "Software", "Account Administration", "Phones", "New Employee", "Data Management", and "Other/General". Each category name is preceded by a green checkmark icon.

Current View	...	Find an item
✓ Title		...
Hardware *		...
Software *		...
Account Administration *		...
Phones *		...
New Employee *		...
Data Management *		...
Other/General *		...

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

The screenshot shows the Chronodat Help Desk web application. The left sidebar has a dark theme with white text. It includes a logo, 'GLOBAL NAVIGATION', and several menu items: 'All Requests' (selected), 'Requests Board', 'Settings' (expanded, showing 'Add-in Settings', 'Categories', 'Sub-Categories & Support Contacts' (selected), 'Resolutions', and 'chronodat Support'), and 'CURRENT USER NAVIGATION'. The main content area has a blue header with 'Create new Request' and tabs 'BROWSE', 'ITEMS' (selected), and 'LIST'. Below this is a section titled 'Request Sub-Categories & Support Contacts' with a sub-section 'Manage Sub-Categories & Support Contacts'. A checkbox 'Add New/Edit Sub-Category & Support Contact' is checked. Below it is a button '+ new item or edit this list'. A search bar 'Find an item' is present. The main list table has columns 'Edit Title', 'Request Category', and 'Support Contact'. The data rows are:

Edit Title	Request Category	Support Contact
Install Monitor *	Hardware	<input type="checkbox"/> Anuradha Edla
Replace RAM *	Hardware	<input type="checkbox"/> Anuradha Edla
Install MS Office *	Software	<input type="checkbox"/> John Lee
Re-Image User Machine *	Software	<input type="checkbox"/> John Lee
Email Account *	Account Administration	<input type="checkbox"/>
Add to AD group *	Account Administration	<input type="checkbox"/>

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

# Navigation

## General Navigation

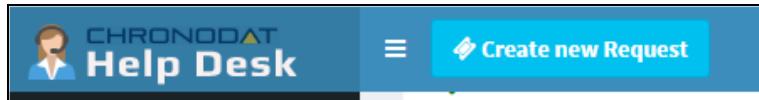
Navigation options are found in the left margin. The arrows function as a toggle, and indicate more menu items below. There are 3 sections: a **Global** section for viewing ALL requests, a **User** section for viewing your own requests, and a section for **Help Desk Documents** and a **Team Calendar**.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

## Navigating to the Dashboard

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

## Hiding the Left Navigation

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



## Creating a New Request

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

The screenshot shows a 'New Request' form with the following fields:

- Request Title:** \* (Required field)
- Request Description:** \*
- Priority:** \* (Medium selected)
- Requested Category:** \* (Select dropdown, currently 'Select')
- Sub-Category:** \* (Select dropdown, currently 'Select')
- Requested For:** (Anuradha Edla)
- Single Attachment:** (Choose File: No file chosen)

Below the attachment field, there is a note: "To attach multiple files, open the request after it has been submitted (you will receive an email confirmation with a link), then attach the subsequent files at that time."

At the bottom of the form are two buttons: 'Submit' (in blue) and 'Cancel'.

## Assigning a Request

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

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

Requester and Support Contact receive email notifications.

Chronodat Help Desk - Request IT-SERVICE-2016- 21 has been submitted.

 Chronodat Help Desk <no-reply@sharepointonline.com>

Today 7:14 PM    Anuradha Edla

Confirmation Notification:  
Request IT-SERVICE-2016-21 has been submitted

Request Title: Enable Content database size (general usage scenarios)  
Requested For: Anuradha Edla  
Requested By: Anuradha Edla  
Summary: The default file size is 50 MB, which can be increased to a maximum of 2 GB. You can fit 100 files in each content database. Multiple site collections can share a single content database. Each site collection needs to be fully stored in a single content database.

Status: Open  
Category: Software  
Urgency: (1) High

Resolution:

To view the request details:  
[Enable Content database size \(general usage scenarios\)](#)

## Dashboards

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

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

Chronodat Service Desk Global Dashboard

Help Desk Global Dashboard

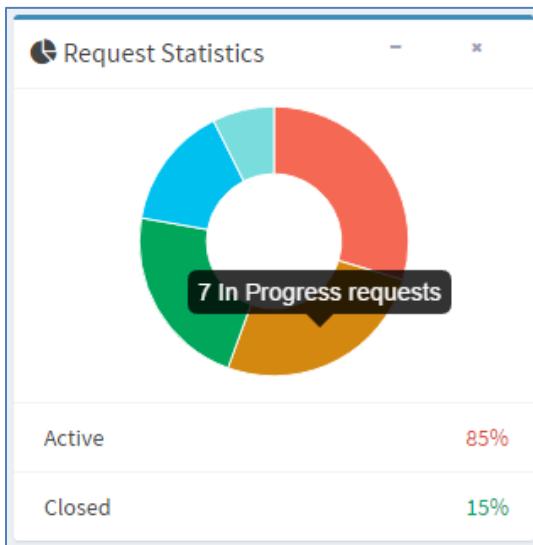
Active	Open	In Progress	Resolved	Closed	Reopened
23	8	7	6	4	2
<a href="#">View All</a>					

Latest Requests

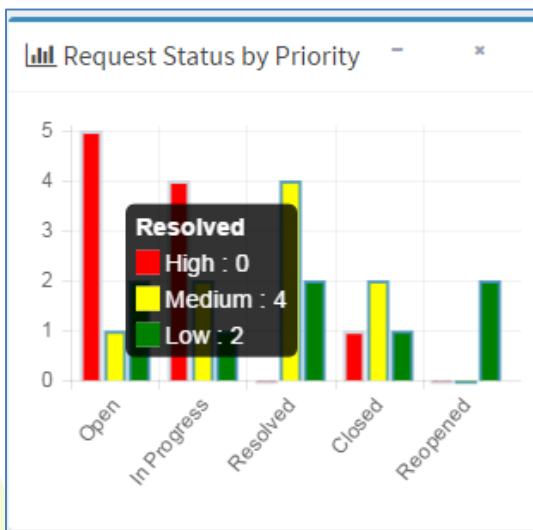
Assigned To Me	Open	In Progress	Resolved	Closed	Reopened	
<a href="#">Print/Edit/Delete</a>	<a href="#">Request ID</a>	<a href="#">Title</a>	<a href="#">Request Status</a>	<a href="#">Priority</a>	<a href="#">Requested For</a>	<a href="#">Modified</a>
	IT-SERVICE-2016-21	Enable Content database size (general usage scenarios)	Open	(1) High	Anuradha Edla	2 minutes ago
	IT-SERVICE-2016-22	Find Number of content databases	Open	(1) High	Anuradha Edla	2 minutes ago

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

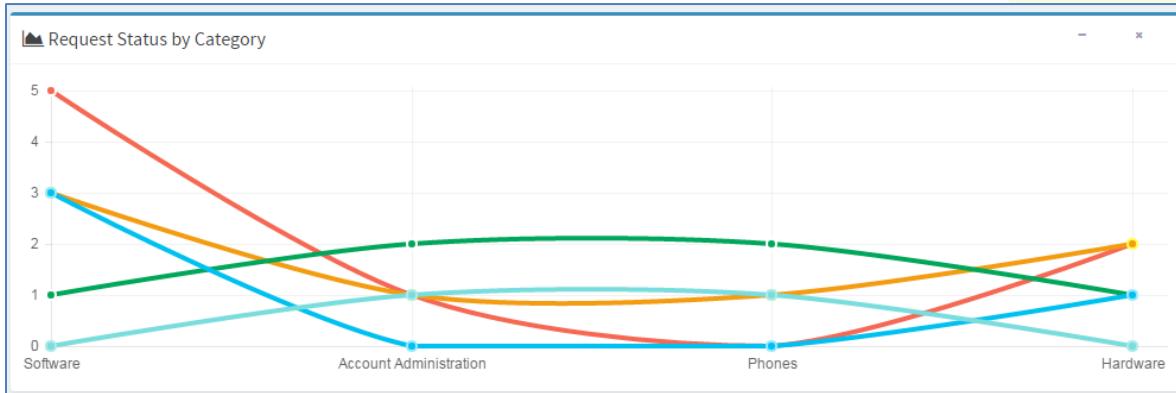
Notice the **pie chart** on the right, which gives you a visual of the **Active vs. Closed** requests, and quickly lets you see that there are a lot more requests that are **Active** than **Closed**.



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



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



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

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

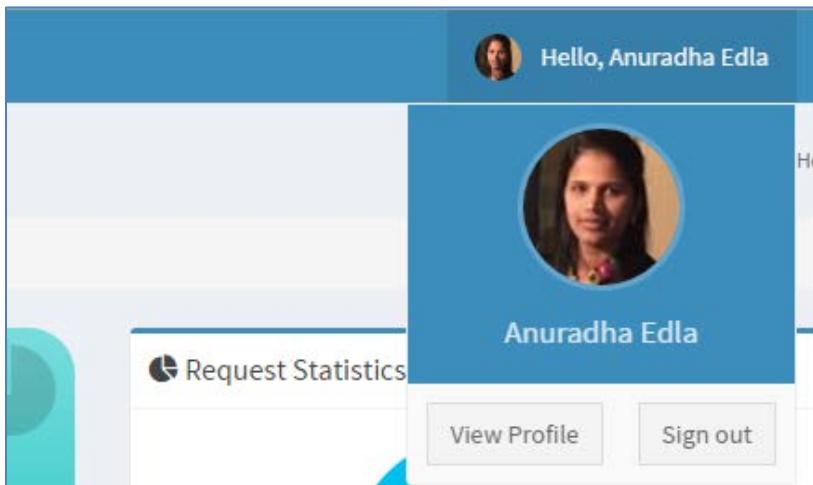
The grid displays the status of requests assigned to eight staff members: Anuradha Edla, Chris Brown, Jennifer Glover, John Lee, Joseph Smith, Kim Marklund, and Nita Daniel. The columns represent the status of the requests. The data is as follows:

Assigned To	Open	In Progress	Resolved	Closed	Reopened	Total
Anuradha Edla	1	3	2	0	0	6
Chris Brown	1	1	0	1	2	5
Jennifer Glover	0	0	0	1	0	1
John Lee	2	2	1	0	0	5
Joseph Smith	1	0	0	1	0	2
Kim Marklund	0	0	1	1	0	2
Nita Daniel	3	1	0	0	0	4
<b>Total</b>	<b>8</b>	<b>7</b>	<b>4</b>	<b>4</b>	<b>2</b>	<b>25</b>

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

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

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



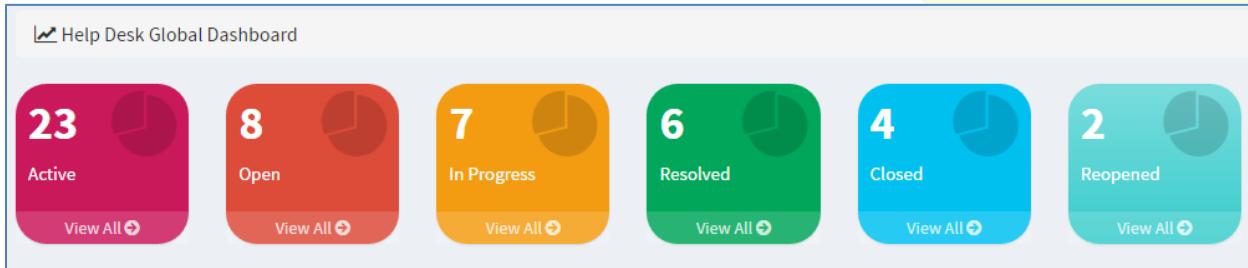
The last area to point out is the **Recently Updated Requests** on the right. These are the 5 most recently updated requests, regardless of Priority or Status.

A screenshot of a list titled "Recently Updated Requests". It shows five items, each with a small profile picture, the request ID, a brief description, the priority level in a colored box, and the status. At the bottom is a "View All Requests" link.

	IT-SERVICE-2016-3 - Coauthoring in Word and PowerPoint for .docx, .pptx and .ppsx files	(2) Medium	Resolved : Modified By - Anuradha Edla
	IT-SERVICE-2016-20 - Document Content database size (document archive scenario)	(2) Medium	In Progress : Modified By - Anuradha E..
	IT-SERVICE-2016-18 - Find Site collections per content database	(3) Low	Reopened : Modified By - Anu...
	IT-SERVICE-2016-2 - Number of content databases	(3) Low	Reopened : Modified By - Anuradha E...
	IT-SERVICE-2016-19 - Increase Content database size (all usage scenarios)	(2) Medium	Closed : Modified By - Anuradha Edla

[View All Requests](#)

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



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

Latest Requests								
Assigned To Me	Open	In Progress	Resolved	Closed	Reopened			
Print/Edit/Delete	Request ID	Title			Request Status	Priority	Requested For	Modified
	IT-SERVICE-2016-21	Enable Content database size (general usage scenarios)			Open	<span>(1) High</span>	Anuradha Edla	2 minutes ago
	IT-SERVICE-2016-22	Find Number of content databases			Open	<span>(1) High</span>	Anuradha Edla	2 minutes ago

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

Requests - Open								
Manage Requests								
<a href="#">Show 10 rows</a> <a href="#">Copy</a> <a href="#">CSV</a> <a href="#">Excel</a> <a href="#">PDF</a> <a href="#">Print</a> <span style="float: right;">Search: <input type="text"/></span>								
Print/Edit/Delete	Request ID	Title	Request Status	Priority	Request Category	Requested For	Assigned To	Modified
	IT-SERVICE-2016-27	Find Maximum size of the content database	Open	<span>(3) Low</span>	Hardware	Kim Marklund	Kim Marklund	9 minutes ago
	IT-SERVICE-2016-23	Purchasing Team - Increase List view threshold for auditors and administrators	Open	<span>(1) High</span>	Hardware	Kim Marklund	Kim Marklund	9 minutes ago
	IT-SERVICE-2016-21	Enable Content database size (general usage scenarios)	Open	<span>(1) High</span>	Software	Anuradha Edla	Anuradha Edla	9 minutes ago
	IT-SERVICE-2016-22	Find Number of content databases	Open	<span>(1) High</span>	Software	Anuradha Edla	Anuradha Edla	9 minutes ago
	IT-SERVICE-2016-6	Remote BLOB Storage (RBS) storage subsystem on Network Attached Storage (NAS)	Open	<span>(1) High</span>	Software	Chris Brown	Chris Brown	10 minutes ago

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

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

The screenshot shows a SharePoint interface for a request. At the top, there's a ribbon with 'VIEW' selected. Below it is a toolbar with icons for 'Edit Item' (highlighted), 'Version History', 'Shared With', 'Delete Item', 'Alert Me', and 'Workflows'. The main area is titled 'Request Details' and contains the following information:

Request ID	IT-SERVICE-2016-27
Title	Find Maximum size of the content database
Description	Certain site collection actions, such as site collection backup/restore or the Windows PowerShell cmdlet Move-SPSite, cause large SQL Server operations which can affect performance or fail if other site collections are active in the same database. For more information, see Move-SPSite.

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

The screenshot shows the same 'Request Details' page, but now in 'EDIT' mode. The ribbon at the top has 'EDIT' selected. The toolbar includes 'Save', 'Cancel', 'Commit', 'Clipboard' (with 'Cut', 'Copy', 'Paste' options), 'Actions' (with 'Delete Item', 'Attach File', and 'Spelling' dropdown), and a 'Spelling' button. The 'Request ID' field is now highlighted in green and displays 'IT-SERVICE-2016-27'. The 'Title \*' field contains 'Find Maximum size of the content database'. The 'Description' field is identical to the one in the previous view. The 'Priority' field shows '(3) Low'.

Comments section in the Request form keeps track of requests history logs. Support team members can update or delete their own comments.

Assigned To *	Anuradha Edla <a href="#">X</a>
Request Status *	In Progress <a href="#">▼</a>
Requested For	Joseph Smith <a href="#">X</a>
Comments	<p>Anuradha Edla 8/3/2016 9:40:18 AM <a href="#">X</a>            Working with Operation team to get content database info.</p> <p>Anuradha Edla 8/3/2016 9:41:16 AM <a href="#">X</a>            Got access to servers. Waiting on SQL server access.</p>

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

<a href="#">Print/Edit</a>	<a href="#">Request ID</a>	<a href="#">Title</a>	<a href="#">Request Status</a>	<a href="#">Priority</a>	<a href="#">Request Category</a>	<a href="#">Requested For</a>	<a href="#">Assigned To</a>	<a href="#">Modified</a>
----------------------------	----------------------------	-----------------------	--------------------------------	--------------------------	----------------------------------	-------------------------------	-----------------------------	--------------------------

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

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

Search:	<input type="text"/>
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## Requests Board

Requests Board <a href="#">Manage Requests</a>	
Open (8)	In Progress (7)
<a href="#">IT-SERVICE-2016-1</a>  List view threshold for auditors ... <a href="#">Hardware</a>	<a href="#">IT-SERVICE-2016-2</a>  Number of content databases <a href="#">Account Administration</a>
<a href="#">IT-SERVICE-2016-5</a>  Maximum size of the content da... <a href="#">Hardware</a>	<a href="#">IT-SERVICE-2016-4</a>  250,000 per site collection/250,0... <a href="#">Phones</a>
<a href="#">IT-SERVICE-2016-6</a>  IT-SERVICE-2016-6 <a href="#">Software</a>	<a href="#">IT-SERVICE-2016-7</a>  Site collections per content data... <a href="#">Phones</a>
<a href="#">IT-SERVICE-2016-8</a>  IT-SERVICE-2016-8 <a href="#">Software</a>	<a href="#">IT-SERVICE-2016-9</a>  Content database size (all usage...) <a href="#">Software</a>
<a href="#">IT-SERVICE-2016-10</a>  IT-SERVICE-2016-10 <a href="#">Software</a>	<a href="#">IT-SERVICE-2016-11</a>  IT-SERVICE-2016-11 <a href="#">Software</a>
<a href="#">IT-SERVICE-2016-12</a>  IT-SERVICE-2016-12 <a href="#">Software</a>	<a href="#">IT-SERVICE-2016-13</a>  Increase Number of content dat... <a href="#">Account Administration</a>
<a href="#">IT-SERVICE-2016-14</a>  IT-SERVICE-2016-14 <a href="#">Software</a>	<a href="#">IT-SERVICE-2016-15</a>  IT-SERVICE-2016-15 <a href="#">Software</a>

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

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

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

## Archiving Requests

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

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

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

A screenshot of a web-based form for creating or modifying a request. The form includes fields for 'Assigned To \*' (containing 'John Lee'), 'Request Status \*' (a dropdown menu with options 'Closed' and 'Archived', where 'Archived' is highlighted), and 'Requested For' (an empty text input). The entire form is enclosed in a light blue border.

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

A screenshot of the 'Requests - Archived' list page. The left sidebar shows a global navigation with 'All Requests' selected, and a sub-menu with categories: Open, In Progress, Resolved, Closed, Reopened, and Archived. The main area displays a table with one entry:

Print/Edit	Request ID	Title	Request Status	Priority	Request Category
	IT-SERVICE-2016-22	Find Number of content databases	Archived	(1) High	Software

Showing 1 to 1 of 1 entries

## My Dashboard / My Requests / My Requests Board

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

The screenshot shows the 'My Dashboard' section of the application. At the top, there are six colored boxes representing different request statuses: Active (2), Open (2), In Progress (0), Resolved (0), Closed (0), and Reopened (0). Below these are sections for 'Latest Requests' and a table of recent tickets. The table has columns for Print/Edit/Delete, Request ID, Title, Request Status, Priority, Requested For, and Modified. Two entries are listed:

Print/Edit/Delete	Request ID	Title	Request Status	Priority	Requested For	Modified
	IT-SERVICE-2016-21	Enable Content database size (general usage scenarios)	Open	(1) High	Anuradha Edla	14 minutes ago
	IT-SERVICE-2016-22	Find Number of content databases	Open	(1) High	Anuradha Edla	14 minutes ago

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

The screenshot shows the 'My Requests - In Progress' section. It features a table with columns for Print/Edit, Request ID, Title, Request Status, Priority, Request Category, and Requested For. The table header includes sorting icons for each column. A message at the top states 'No data available in table' and below it says 'Showing 0 to 0 of 0 entries'.

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

## Document Repository

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

Name	Modified	Modified By	Request Category	Request Sub-Category
Document	About a minute ago	Anuradha Edla		
SLA Document	8 minutes ago	Anuradha Edla		

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

## Using the Team Calendar

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

A screenshot of a SharePoint list titled "Team Calendar". The page includes a header with "Manage Events" and a search bar. Below the header, there's a button to "Add New/Edit Event" and a link to "+ new event or edit this list". A "Current View" dropdown and a search bar are also present. The main content area displays a message: "There are no items to show in this view of the 'Calendar' list." Navigation links like "Edit", "Title", "Start Time", "End Time", "Location", "Request Category", "Request Sub-Category", and "All Day Event" are visible at the bottom.

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

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

## Security

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

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

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

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

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

This screenshot shows the 'My Requests' section of the Chronodat Service Desk. The left sidebar has a single item: 'My Requests'. The main area displays a table of requests with columns for Print/Edit, Request ID, Title, Request Status, Priority, Requested For, and Modified. There are three entries:

Print/Edit	Request ID	Title	Request Status	Priority	Requested For	Modified
	IT-SERVICE-2016-26	Find Maximum size of the content database	Open	(0) Low	Nita Daniel	Yesterday at 4:46 PM
	IT-SERVICE-2016-23	Purchasing Team - Increase List view threshold for auditors and administrators	Open	(0) High	Nita Daniel	Yesterday at 4:46 PM
	IT-SERVICE-2016-15	Find Maximum size of the content database.	Open	(0) Low	Nita Daniel	Yesterday at 4:46 PM

To the right, there are two charts: a donut chart for Request Statistics and a bar chart for Request Status by Priority.

## Dashboard/Home Page (Support Team)

This screenshot shows the 'Global Dashboard' section of the Chronodat Service Desk. The left sidebar includes 'Global Dashboard', 'All Requests', 'Requests Board', 'Settings', 'My Dashboard', 'My Requests', and 'My Requests Board'. The main area features a 'Help Desk Global Dashboard' with six summary cards showing counts for Active, Open, In Progress, Resolved, Closed, and Reopened requests. Below this is a 'Latest Requests' table and a 'Request Status by Category' chart.

**Summary Cards (Help Desk Global Dashboard):**

- Active: 23
- Open: 8
- In Progress: 7
- Resolved: 6
- Closed: 4
- Reopened: 2

**Latest Requests Table:**

Assigned To Me	Open	In Progress	Resolved	Closed	Reopened	
	IT-SERVICE-2016-21	Enable Content database size (general usage scenarios)	Open	(0) High	Anuradha Edla	16 minutes ago
	IT-SERVICE-2016-22	Find Number of content databases	Open	(0) High	Anuradha Edla	16 minutes ago

**Request Status by Category Chart:**

A bar chart showing the count of requests across categories: Open, In Progress, Resolved, Closed, and Reopened. The Y-axis ranges from 0 to 5, with bars reaching approximately 5 for Open, 4 for In Progress, 3 for Resolved, 2 for Closed, and 1 for Reopened.