Service Desk Analytics

Visual User Guide

Complete Step-by-Step Guide with Screenshots

* Upload and analyze ticket data
* Interactive dashboard with charts
* SLA compliance management
* Professional PDF reports
* AI-powered insights
* Advanced filtering options

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1. Getting Started

Step 1: Access the Application

1. Open your web browser (Chrome, Firefox, Safari, or Edge)
2. Navigate to the application URL
3. You will see the welcome screen with upload area

Welcome Screen Screenshot

[Screenshot will be added here]

Step 2: What You'll Need

- CSV file with ticket data
- File should contain columns: ticketId, subject, status, priority, etc.
- Modern web browser with JavaScript enabled
- Stable internet connection

2. Uploading Your Data

How to Upload Your CSV File

1. Click the upload area or drag and drop your CSV file
2. Wait for the file to process (you'll see a loading indicator)
3. Dashboard will load automatically with your data
4. If upload fails, check file format and try again

Upload Area - Click Here to Upload

[Screenshot will be added here]

File Format Requirements

* File must be .csv format
* First row should contain column headers
* Required columns: ticketId, subject, status, priority, createdTime
* Optional columns: companyName, sdm, agent, type, resolvedTime

3. Dashboard Overview

Top Metrics Cards

- Total Tickets - Shows overall count
- Open Tickets - Currently unresolved
- Closed Tickets - Resolved tickets
- Average Resolution - Time in hours
- SLA Compliance - Click for details

Charts Section

- Monthly Trends - Created vs Resolved
- Open Tickets by Type - Pie chart

Escalated Tickets

- Shows escalated tickets
- Color-coded by priority
- Click for more details

Full Dashboard View

[Screenshot will be added here]

4. Using Filters

Where to Find Filters

Filters are located in the blue bar below the header when data is loaded.

SDM Filter

Select specific Service Delivery Manager

How to use: Click dropdown > Select SDM or "All SDMs"

Company Filter

Focus on specific client company

How to use: Click dropdown > Select company or "All Companies"

Date Filter

Choose time period for analysis

How to use: Click dropdown > Select preset or specific month

Clear All Filters

Click the "Clear Filters" button to reset all filters to "All" selections.

Filter Bar - Click Here

[Screenshot will be added here]

5. Understanding Metrics

Total Tickets
Complete count of all tickets in your dataset

Open Tickets
Tickets that are not yet resolved or closed

Closed Tickets
Tickets marked as resolved or closed

Average Resolution
Mean time to resolve tickets (displayed in hours)

SLA Compliance
Percentage of tickets meeting SLA requirements

>> Click to open detailed SLA analysis

Charts and Visualizations

- Monthly Trends: Shows created vs resolved tickets over 7 months
- Open Tickets by Type: Pie chart showing ticket category distribution
- All charts update automatically when you apply filters

6. SLA Management

How to Access SLA Details

1. Click the "SLA Compliance" metric card on the dashboard
2. A modal window will open showing detailed SLA breakdown
3. Use the tabs to view different aspects of SLA data
4. Search for specific tickets using the search box

SLA Override System

* Green Toggle = Ticket meets SLA requirements
* Red Toggle = Ticket breaches SLA requirements
>> Click any toggle to override the system calculation

Export SLA Data

Click "Export to Excel" button to download current SLA breach data.

SLA Modal - Click Toggles Here

[Screenshot will be added here]

7. Generating Reports

Before Generating Reports

1. Set your desired filters (Company, SDM, Date Range)
2. Review the dashboard to ensure data looks correct
3. Check SLA overrides if needed
4. Verify charts show the expected data

How to Generate PDF Reports

1. Click the "PDF" button in the top toolbar
2. Wait for generation (usually 10-30 seconds)
3. Download starts automatically
4. File saved with descriptive name

What's in Your Report

- Page 1: Title page with client and report details
- Page 2: Agenda and report overview
- Page 3: Key performance metrics dashboard
- Page 4: SLA compliance analysis
- Page 5: Escalated tickets (if any exist)
- Page 6: Monthly ticket trends chart
- Page 7: Open tickets by type chart
- Page 8: Questions and discussion page

PDF Button - Click Here

[Screenshot will be added here]

8. Troubleshooting

Problem: CSV file won't upload

- Check file is .csv format
- Verify column headers match requirements
- Try with smaller file size
- Ensure stable internet connection

Problem: Dashboard not showing data

- Refresh the browser page
- Check browser console for errors
- Clear browser cache
- Try uploading file again

Problem: PDF generation fails

- Check browser console for errors
- Try with smaller date range
- Ensure stable internet connection
- Refresh page and try again

Problem: Filters not working

- Click "Clear Filters" button
- Reload the page
- Upload data again
- Try different browser

Need More Help?

If you continue to experience issues:

1. Check the browser console for detailed error messages
2. Try with a different browser or device
3. Contact your system administrator for support