KronoDesk® User Manual

Version 2.0

Inflectra Corporation

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1. Introduction

KronoDesk® is an integrated customer support system that includes help desk ticketing, customer support forums and an online knowledge base in a single user interface.

KronoDesk® includes a powerful and flexible help desk ticketing system that can be quickly and easily tailored to meet your support needs. With support for custom fields and workflows you can create different support processes for your different products.

KronoDesk® provides a knowledge base and online support forums, making your customers more self-sufficient with routine issues so that your support personnel can focus their time on the critical issues and complex enquiries.

This user manual outlines the features and functionality available in KronoDesk®, and demonstrates how to use the application to improve your customer satisfaction and optimize your customer support. For information on how to install and administer KronoDesk, please refer to the *KronoDesk Administrative Guide*.

1.1. Improve Customer Satisfaction

For your customers, KronoDesk® provides a single, easy to use destination for all their support needs. When they arrive with a problem, question or enquiry, KronoDesk will direct them to relevant knowledge base articles, suggest helpful discussion threads and provide self-service solutions so that they can find a wide range of immediate solutions and suggestions.

For those enquiries that do not match an existing article or have not yet been discussed in a support forum, KronoDesk will direct the customer to log a help desk ticket.

The system provides an easy-to-use help desk submission form that gathers the appropriate information to ensure a speedy resolution of the problem. The customer can use their personalized dashboard to view the status of their help desk tickets and provide additional information as requested by the support agents.

1.2. Optimize Customer Support

For your support agents, KronoDesk® eliminates the time and effort spent checking separate systems for help desk tickets, support requests and forum posts. Using the customizable agent dashboard, they can view all their assigned tickets, monitor incoming forum posts and check for new tickets all from the same screen.

To reduce the time and effort spent dealing with routine enquiries, the agents can use KronoDesk to create knowledge base articles, FAQs, whitepapers and forum posts to document common problems and the possible solutions.

2. Functionality Overview

This section outlines the functionality provided by KronoDesk® in the areas of help desk ticketing, customer support forums, online knowledge base and user account management.

2.1. Dashboards

When a customer first accesses KronoDesk, they are taken to the KronoDesk Customer Homepage. This page is designed to provide them with an easy to use starting point for resolving their support issue. They are provided with tools for searching the online knowledge base, asking questions in the support forums and a link to create a help desk ticket.

The dashboard also includes recent knowledge base articles, news updates, and recent forum posts so that they can keep on top of recent development and contribute back into the support community.

For customer service agents, the Employee Homepage provides them with a consolidated view of their assigned tickets, any tickets not current assigned, recent forum posts, and current news updates so they can see all inbound requests from customers in one single place, ensuring that they are able to monitor the support forums and help desk from a single screen.

2.2. Knowledge Base

The KronoDesk® online knowledge base provides the first level of support to customers. Instead of having to constantly respond to the same routine enquiries and support requests, customer support agents can use the built-in knowledge base to create articles related to different topics, categories and products. Knowledge base articles can be linked to multiple categories and also tagged with meta-tags to make searching easier by customers. The system includes full rich-text editor so that articles can be formatted with lists, tables, different text styles and embedded hyperlinks.

2.3. Support Forums

The KronoDesk® support forums provide the next level of support to customers. Where a fully codified knowledge base article has not yet been synthesized and created by the support agents, the support forums provide a place where users can search for existing messages concerning the same problem. The support forums thereby provide a community where customers and support agents can post replies to common questions visible to the entire community.

This provides a faster turnaround for customers who can find immediate solutions to their issues and enables the support agents to focus their time on dealing customer issues that have not been previously encountered or customers issues that particularly complex or environment-specific.

2.4. Help Desk Ticketing

The KronoDesk® help desk ticket management system provides the final level of customer support. When a customer cannot readily find the solution through either the knowledge base or support forums, they can submit a help desk ticket through KronoDesk's help desk submission system. The system allows them to quickly and easily enter the description of the problem, attach any relevant documents or screenshots, categorize the issue and then submit it for resolution by the support agents.

The customer support agents can use the help desk system to review incoming tickets, assign them to themselves or other support agents as needed, provide suggestions to the customer, or escalate to the next level of support. They can use the system to add notes to the ticket, change the fields, or ask for more information. Any changes made to the ticket will be notified to the customer so that they're kept abreast of changes to their ticket. In addition, the customer can use their customer homepage to see a list of their open tickets together to see at a glance what action has been taken and what recommendations have been made.

2.6. User Account Management

KronoDesk® supports the management of an unlimited number of users, which can be administered through the same web interface as the rest of the application, and each user of the system can be given a specific role in the system. In addition, each user has a secure Account management section of the application where they can update their personal information, manage their subscriptions and change their password information.

In addition to these administration functions, each user has their own personalized dashboard view of all the pertinent and relevant information. This feature reduces the information overload associated with managing such a rich source of information, and allows a single customer and employee snapshot to be viewable at all times for rapid decision-making.

2.7. Miscellaneous

2.7.1. Artifact Relationships

The sections above have outlined the different features and functions available in the system, and have described the various artifacts managed in the system (e.g. tickets, articles, forums, threads, etc.). To aid in understanding how the information is related, the following diagrams illustrates the relationships between the different artifacts and entities:

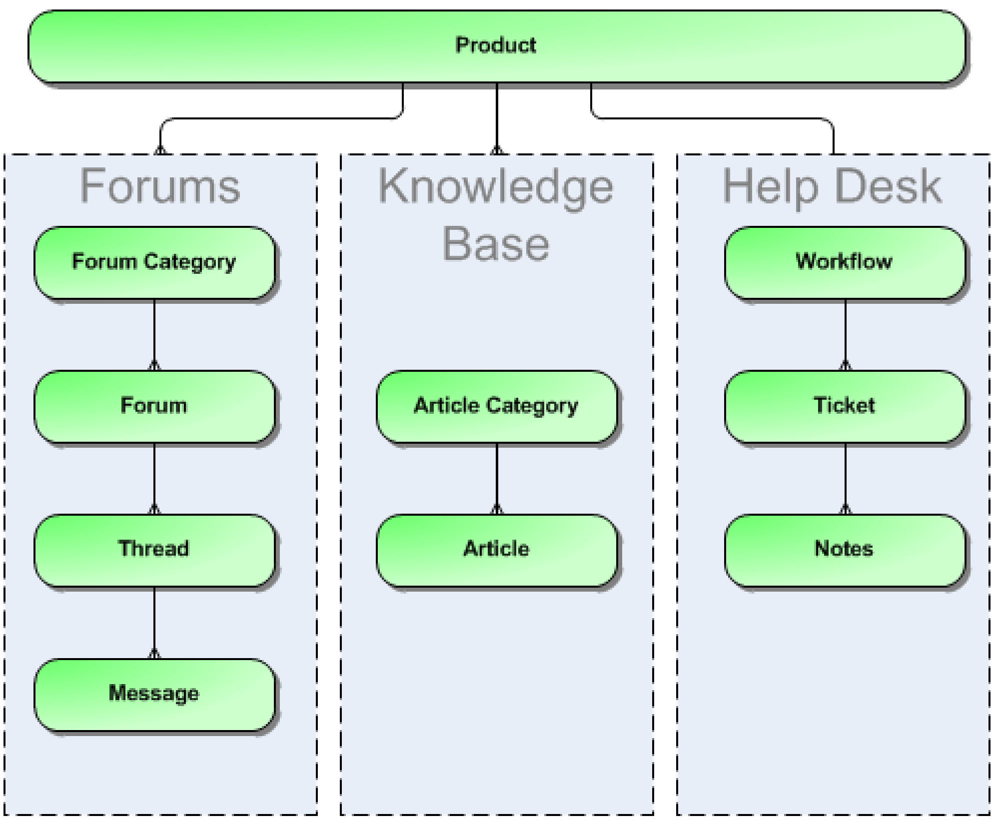


Figure 1: The relationships between the various KronoDesk entities

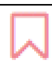
With these overall concepts in mind, the rest of this help manual will outline the functionality in each of the KronoDesk® screens, and provide specific information on how to manage each of the artifacts illustrated above. Note that this manual does not explain the Administration-level functionality of the system; for that, please refer to the *KronoDesk® Administration Guide*.

2.7.2. Artifact Naming Conventions

On various screens in the system, you will see lists of artifacts (tickets, articles, etc.) together with a unique identification number. In order to make it easier to recognize at a glance which type of artifact the identification number refers to, KronoDesk uses a system of two-letter prefixes which help identify the type of artifact being displayed. The current prefixes used by the system are:

Artifact	Prefix	Artifact	Prefix
Ticket	TK	Knowledge Base Article	KB
Ticket Status	TS	User	US
Ticket Type	TT	Forum	FR
Ticket Priority	TP	Thread	TH
Ticket Resolution	TR	Message	MG
Product	PR		

In addition, certain artifacts in the system are displayed with an icon that helps distinguish them from each other, and provides additional context on the state of the artifact:

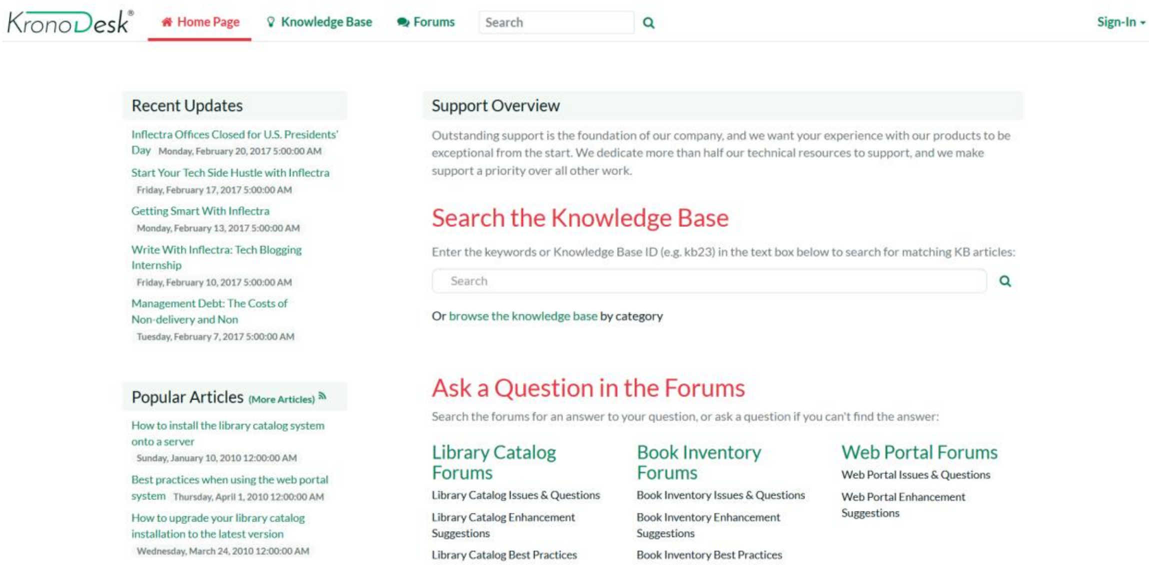
Icon	Artifact Description
	Knowledge Base Article
	Forum Category
	Forum
	Thread
	Help Desk Ticket
	SpiraTeam® Incident
	Artifact has an Attachment

3. Home Page

When you first access KronoDesk®, the system will default to displaying either the Customer Home Page or the employee home page. The choice of default home page depends on whether you are logged into the system and if so, what role(s) your user belongs to. In either case, you can switch from the Customer Home Page to the Employee Home Page by clicking the link at the top of the page (assuming your user has permissions to see the other page).

3.1. Customer Home Page

When you first access the system without being logged-in, it will display the public version of the customer home page illustrated below:

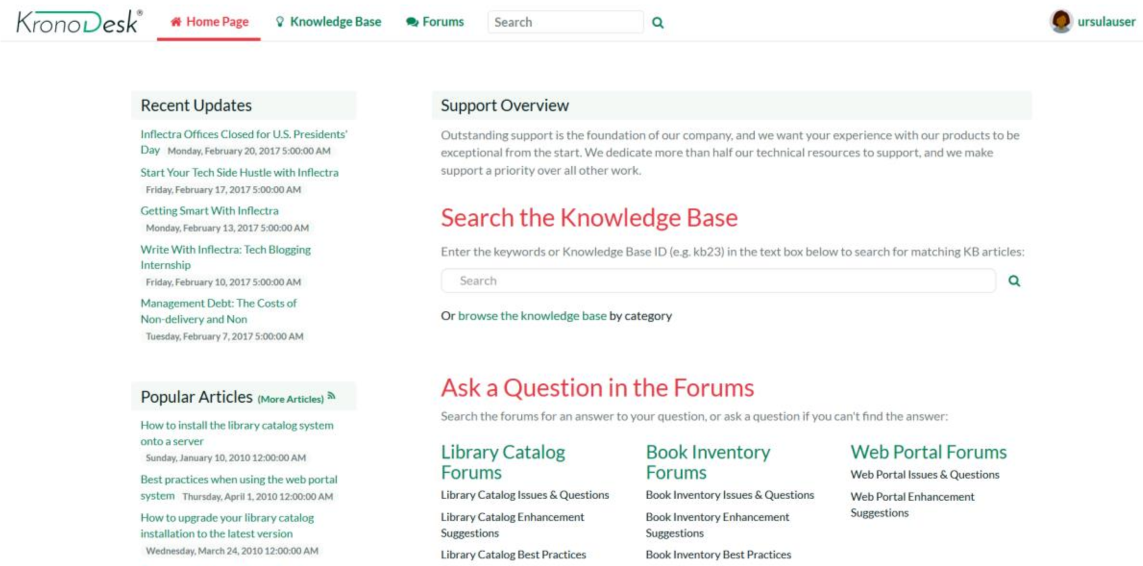


This version of the home page is neither personalized, nor customizable and displays the following widgets:

- **Support Overview** – This widget walks you through the steps of getting your support issue resolved. It provides a search box for searching the online knowledge base, links to browse the support forums and a message that you need to first log-in if you want to submit a help desk ticket.
- **Recent Forum Posts** – This widget displays a list of the most recent forum posts, including the name and date of the post. Positioning the mouse over the title will display a popup tooltip containing the long description of the post.
- **Recent Updates** – If enabled by the administrator, this will display a list of recent news items from the company's website made available by an RSS newsfeed. Positioning the mouse over the title will display a popup tooltip containing the long description of the news item.
- **Popular Articles** – This widget displays a list of the knowledge base articles that have been most frequently viewed by users of the system. Each article is displayed with its title and date of publication. Positioning the mouse over the title will display a popup tooltip containing the long description of the article.
- **Recent Articles** - This widget displays a list of the most recently submitted knowledge base articles that have been submitted into the system. Each article is displayed with its title and date

of publication. Positioning the mouse over the title will display a popup tooltip containing the long description of the article.

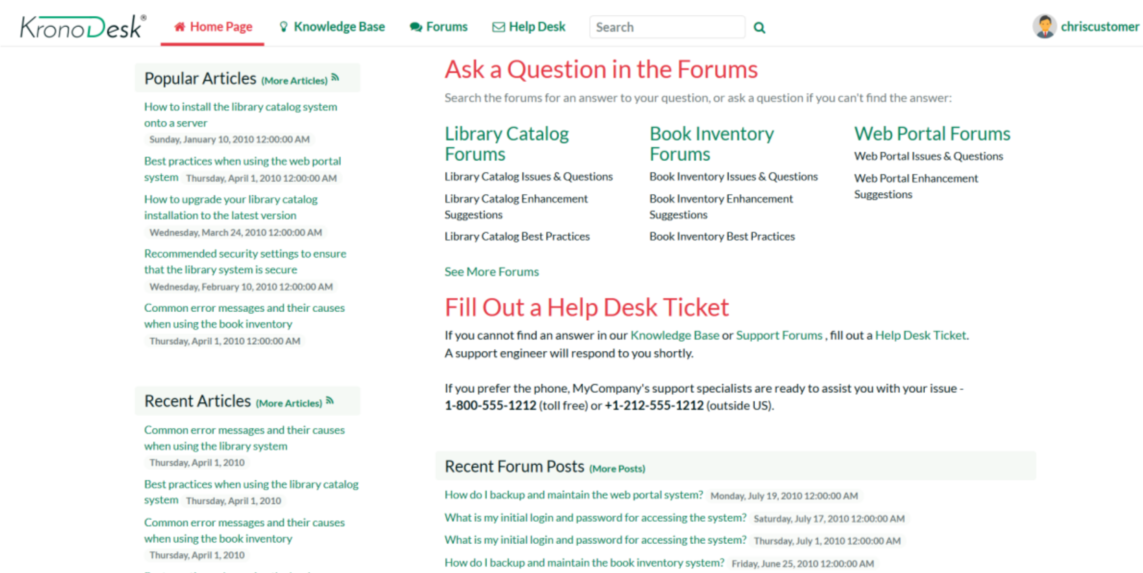
If you follow the instructions and login to the system with a basic user account (i.e. a user that does not have the “customer” role such as **ursulauser**), the dashboard will change to the basic authenticated user home page illustrated below:



This version of the home page contains all the widgets in the public version, with the following additions:

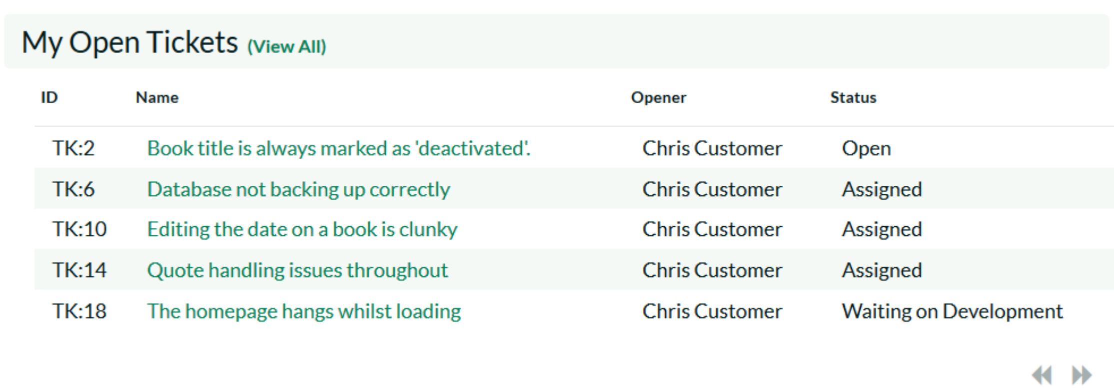
- **Subscribed Threads** – This widget displays a list of the support forum threads that your user is currently subscribed to. This allows you to keep track of specific topics that are of interest.
- **Subscribed Articles** – This widget displays a list of the knowledge base articles that your user is currently subscribed to. This allows you to keep track of specific topics that are of interest.

If you login to the system with a Customer account (one that has the role of customer, for example **chriscustomer**), you will get the registered customer home page which is illustrated below:



This version of the home page contains all the widgets in the public version, with the following additions:

- **Support Overview** – This widget includes all of the information in the other versions of the home page, but it will also include links for creating a new help desk ticket.
- **Useful Links** – This widget simply displays a list of useful links that have been provided by the customer support agents.
- **My Open Tickets** – This widget displays a list of all the open help desk tickets logged by your user. The list is displayed in descending date-order. The list includes the name of the ticket, the product it relates to, the status of the ticket and the customer support agent it is assigned to (if any). Positioning the mouse over the title will display the full description of the ticket, together with any notes from the customer support agent.

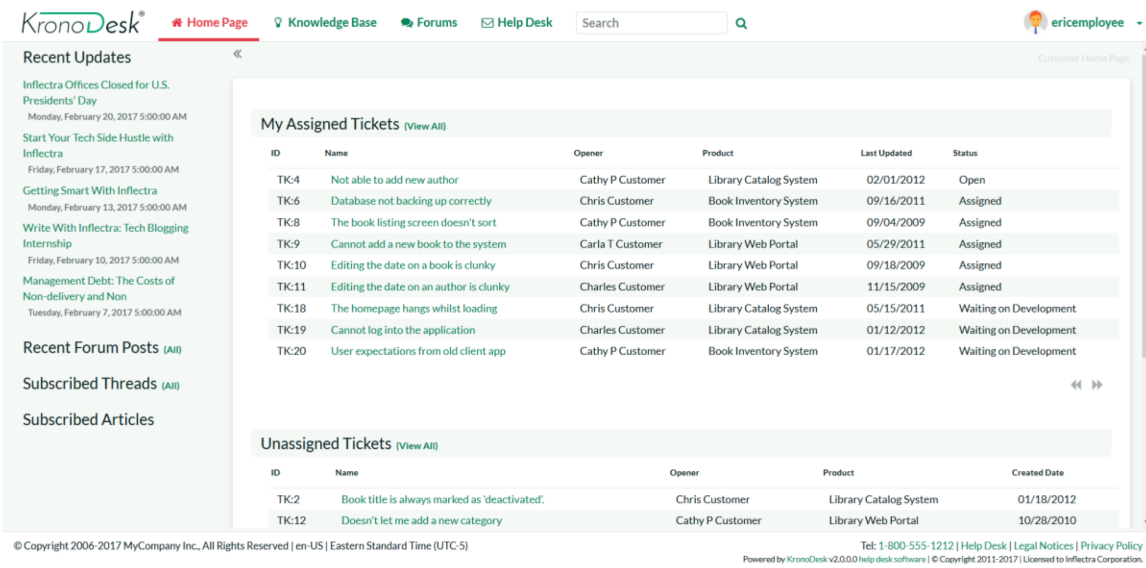


My Open Tickets (View All)

ID	Name	Opener	Status
TK:2	Book title is always marked as 'deactivated'.	Chris Customer	Open
TK:6	Database not backing up correctly	Chris Customer	Assigned
TK:10	Editing the date on a book is clunky	Chris Customer	Assigned
TK:14	Quote handling issues throughout	Chris Customer	Assigned
TK:18	The homepage hangs whilst loading	Chris Customer	Waiting on Development

3.2. Employee Home Page

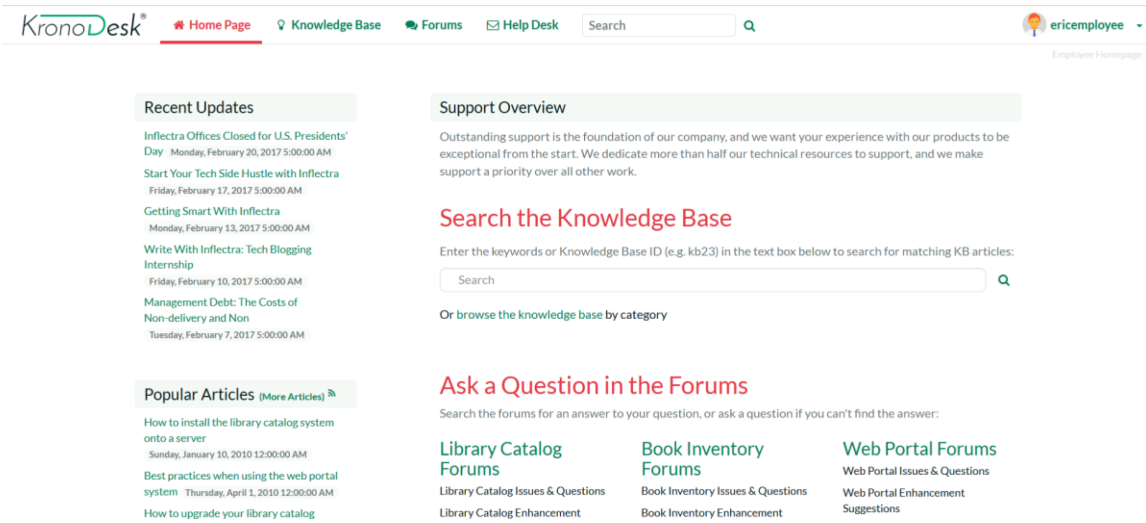
When you first access the system whilst logged-in as a customer support agent (i.e. in the “Employee” role such as **ericemployee**), it will display the employee home page illustrated below:



This dashboard is personalized to the current user and can also be customized by clicking on either the “Modify Layout/Settings” or “Add Items to Dashboard” hyperlink. By default, this home page includes the following customer agent widgets:

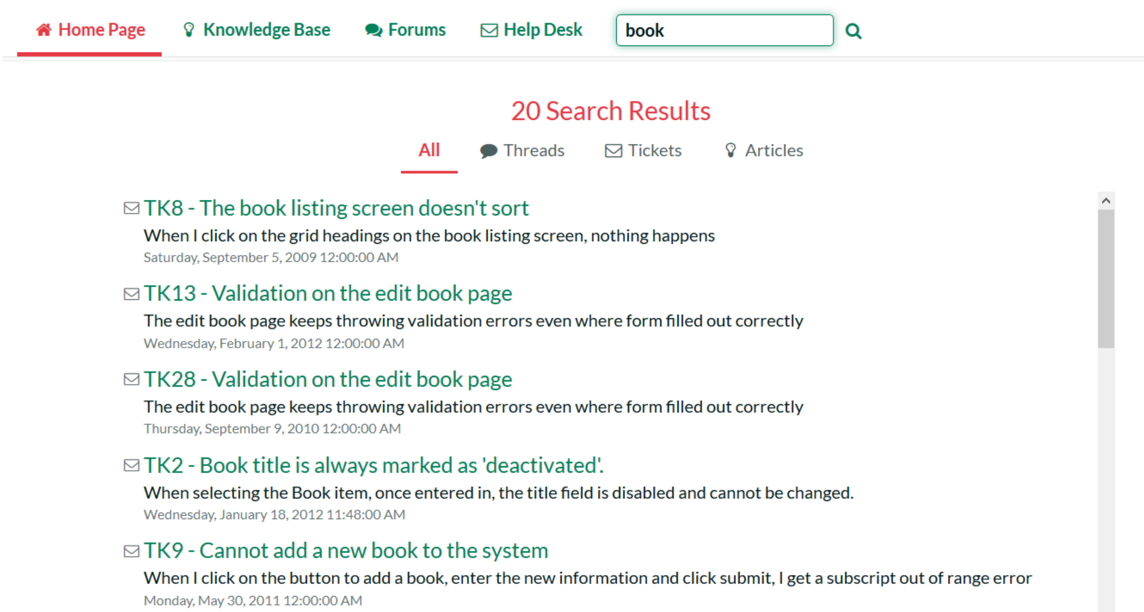
- **My Assigned Tickets** – This widget displays a grid containing the most recent open help desk tickets that have been assigned to you. Each ticket is displayed along with the name of the product it relates to, the customer who opened it, the date it was created, its current status, and the date that it was last updated.
- **Unassigned Tickets** – The widget displays a grid containing the most recent open help desk tickets that are not currently assigned to any customer support agent. Each ticket is displayed along with the name of the product it relates to, the customer who opened it, the date it was created, its current status, and the date that it was last updated.
- **Recent Updates** – If enabled by the administrator, this will display a list of recent news items from the company’s website made available by an RSS newsfeed. Positioning the mouse over the title will display a popup tooltip containing the long description of the news item.
- **Recent Forum Posts** – This widget displays a list of the most recent forum posts that have not yet been answered. The list includes the name and date of the post, and positioning the mouse over the title will display a popup tooltip containing the long description of the post.
- **Subscribed Threads** – This widget displays a list of the support forum threads that your user is currently subscribed to. This allows you to keep track of specific topics that are of interest.
- **Subscribed Articles** – This widget displays a list of the knowledge base articles that your user is currently subscribed to. This allows you to keep track of specific topics that are of interest.

As an employee or other internal user, you can click on the “Customer Home Page” hyperlink to display the view of a customer in case you want to see what they’re currently seeing:

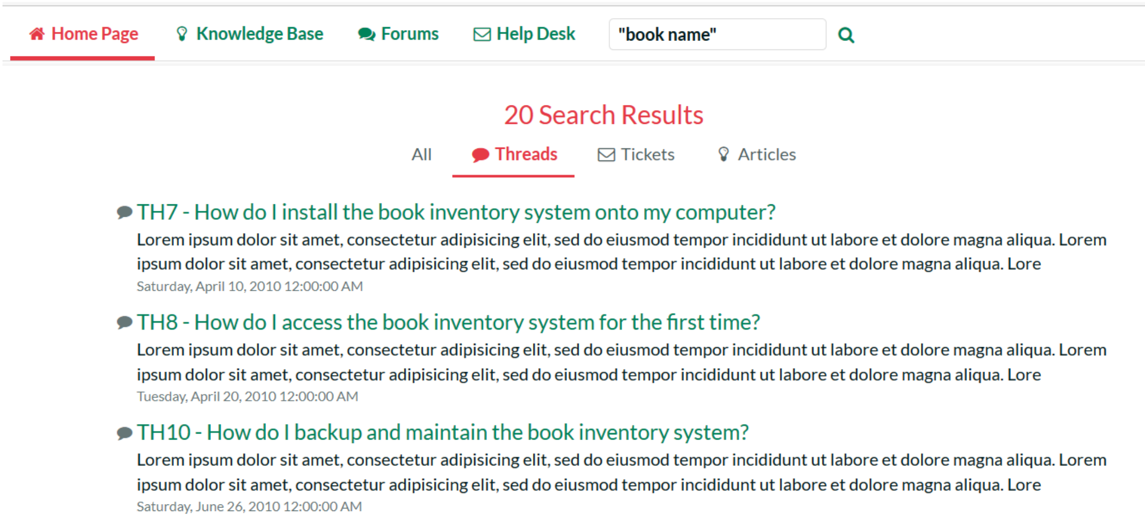


3.3. Global Search

KronoDesk includes a global search bar that can be used to search across products and artifact types for items that include the entered keywords in either the name or description field:

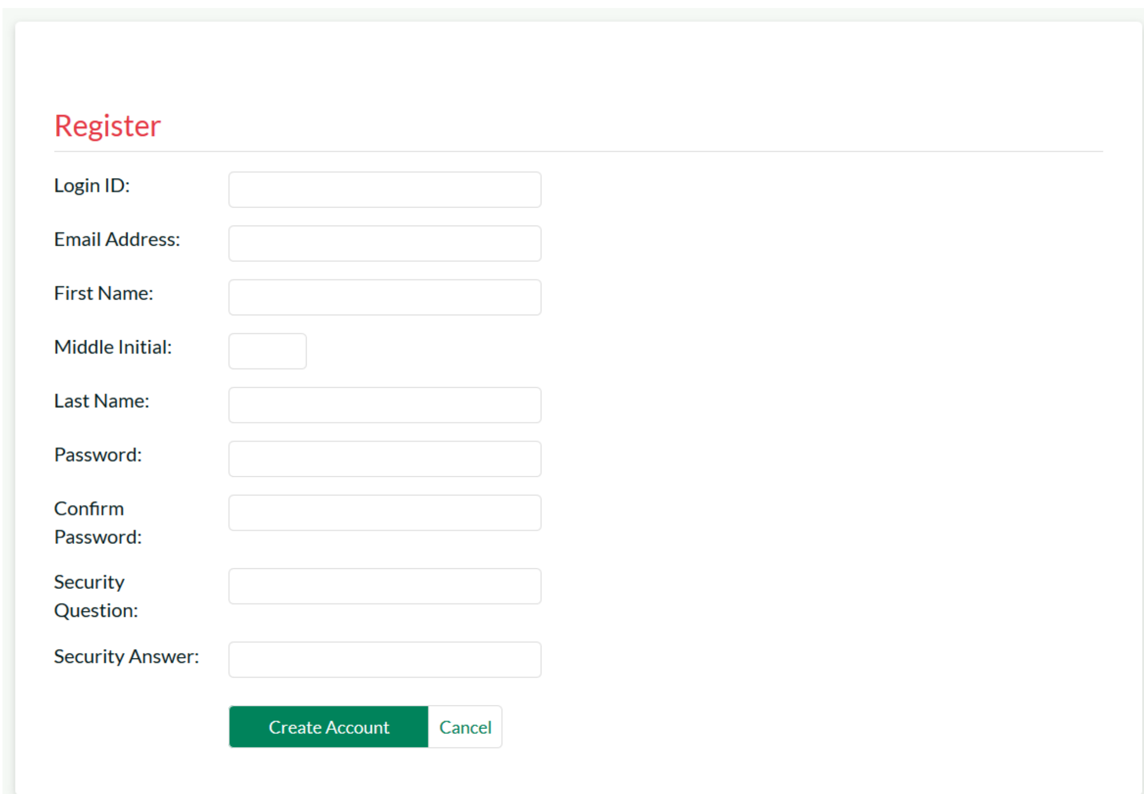


You can narrow down the search results by clicking on the artifact filters to limit the returned results to just forum threads, support tickets or knowledge base articles:



3.4. Register for New Account

When you click on the hyperlink to register a new account, the system will display the following dialog:



You need to enter the following fields:

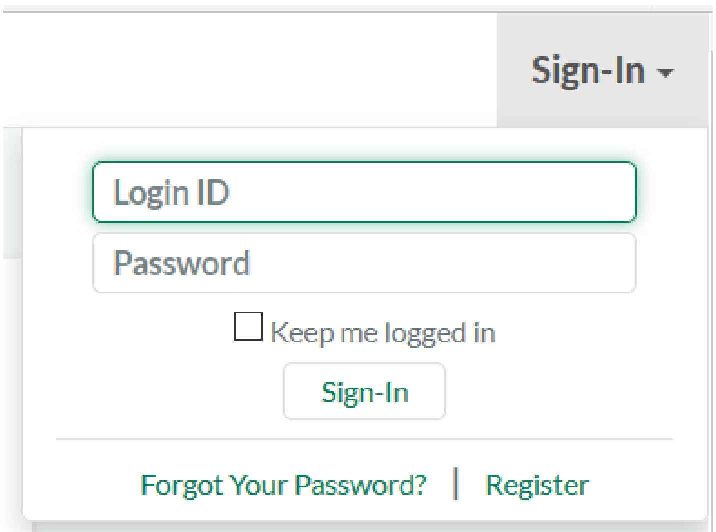
- **Login ID** – the username that you'd like to use in the system. This has to be unique.
- **Email Address** – a valid email address that notifications will be sent to.

- **First Name** – your first name
- **Last Name** – your last name
- **Middle Initial** – your middle initial (if applicable)
- **Password** – enter your desired password twice to ensure that you have entered it correctly.
- **Password Question/Answer** – enter a question that only you will know the answer to, together with the matching answer to that question.

Once click the [Create User] button, the system will create a new user in the system. Depending on how the administrator has configured the system, you may get a welcome email that provides you with a copy of your chosen login information.

3.5. Sign-In to Account

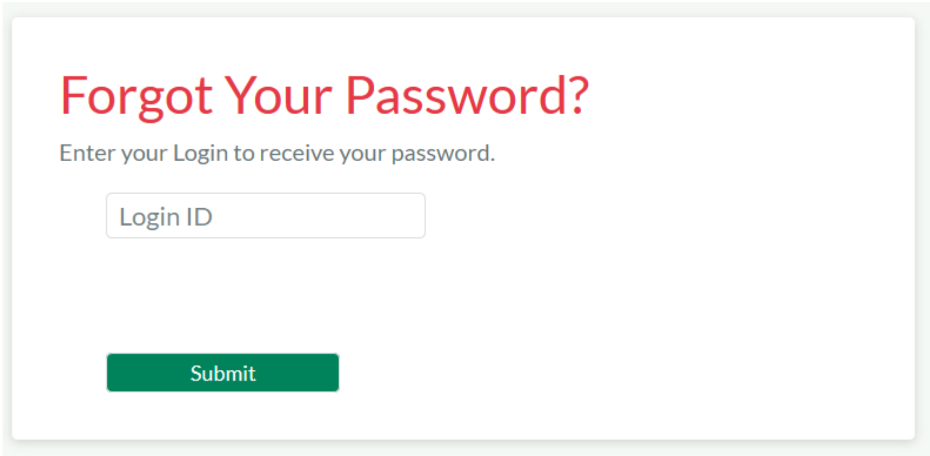
When you click on the hyperlink to sign-in to an existing user account, the following dialog is displayed:



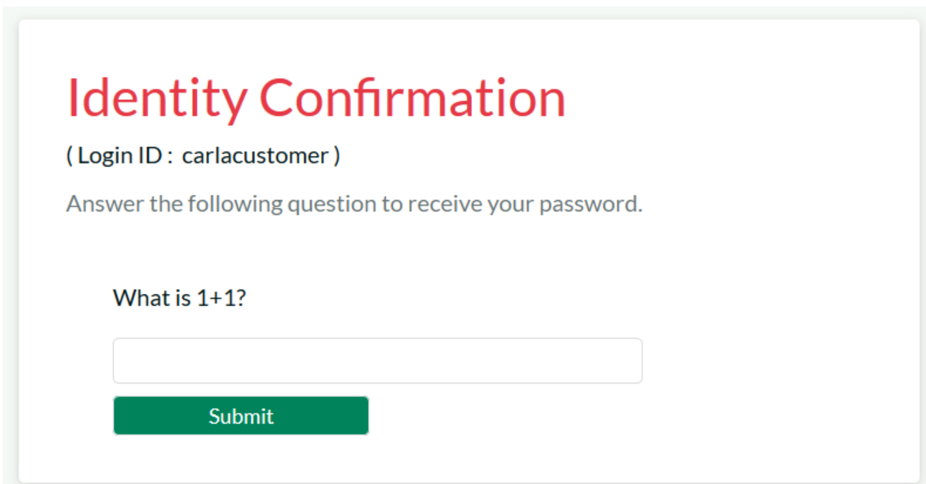
You need to enter a valid login and password to access the system. If you enter an incorrect login or password, the system will display a validation message. If you fail to login successfully after five (5) attempts, the system will lock your user account for ten (10) minutes. This is to prevent brute-force attacks on the system.

3.5.1. Reset Your Password

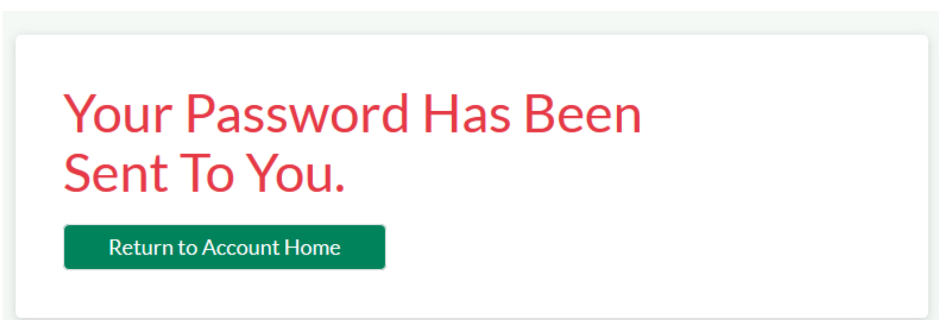
If you have forgotten your password, click on the “Forgot Your Password” hyperlink which will display the following dialog:



To reset your password, you need to enter your login name and click the “Submit” button. Then you’ll be taken to the password question/answer challenge screen:



You will be asked to provide the answer to your secret question. If you successfully enter the correct password answer, the system will generate a new random password and email it to you.



If for any reason you do not receive an email with your new password, you need to contact the administrator of your installation to have them manually reset your password.

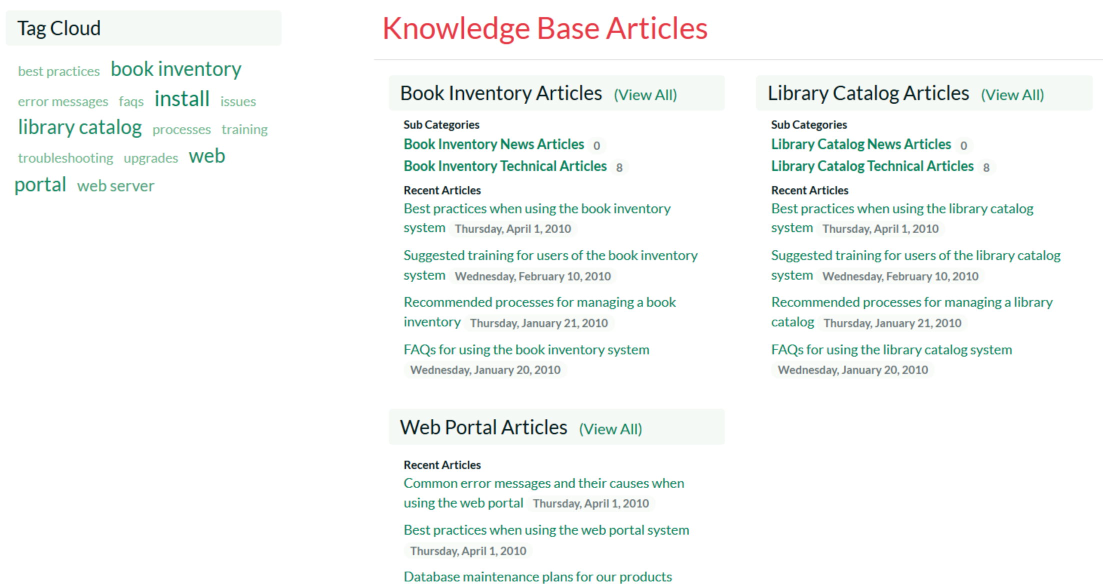
4. Knowledge Base

The KronoDesk® online knowledge base provides the first level of support to customers. Instead of having to constantly respond to the same routine enquiries and support requests, customer support agents can use the built-in knowledge base to create articles related to different topics, categories and products. Knowledge base articles can be linked to multiple categories and also tagged with meta-tags to make searching easier by customers. The system includes full rich-text editor so that articles can be formatted with lists, tables, different text styles and embedded hyperlinks.

When a user starts entering a support ticket, KronoDesk automatically scans the available KB articles to suggest a response before they submit the ticket.

4.1. Article List

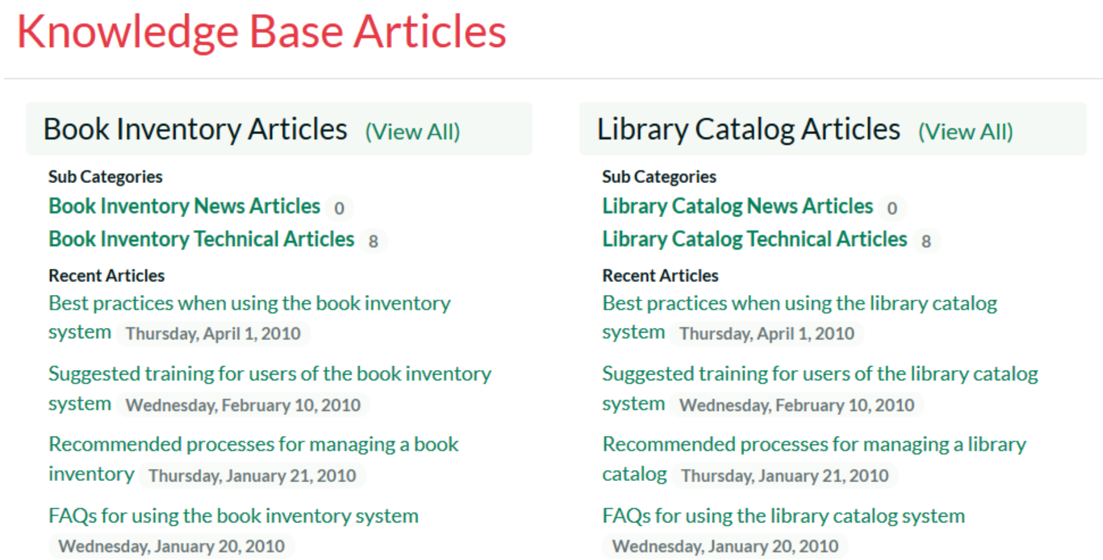
When you click on the Knowledge Base option in the global navigation, you will be taken to the main knowledge base page:



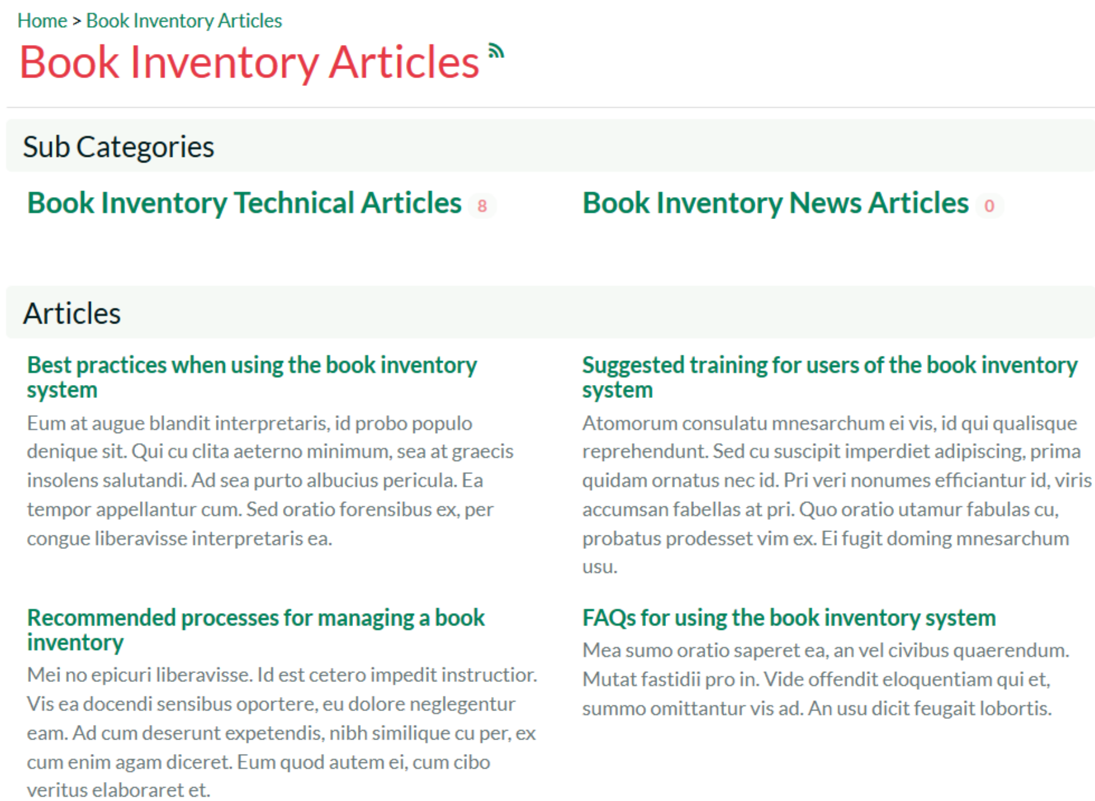
This page consists of list of article categories, with recent articles and sub-categories displayed underneath. In addition, on the left-hand side, there is a tag cloud that lets you find articles that use the various tags.

4.1.1. Category and Article List

The main section of the page will display a list of the article categories and sub-categories, with the list of most recent articles displayed underneath:



If you click on a specific category or sub-category, KronoDesk will display the list of articles in the category, ordered by date:

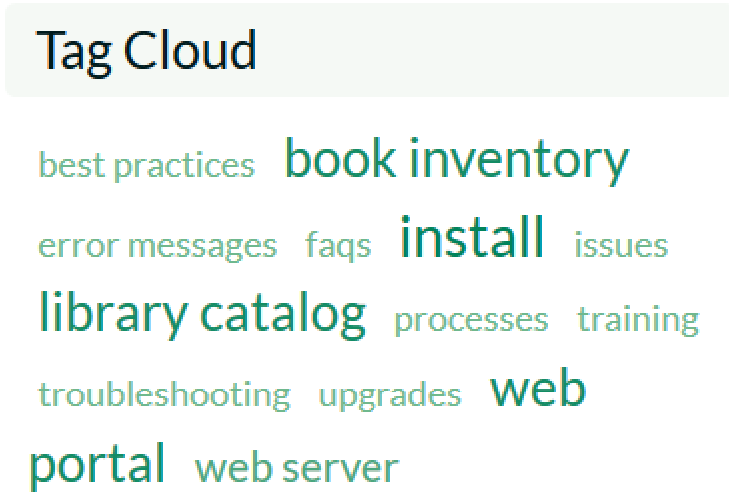


If you click on the RSS icon, you can subscribe to the current category in an RSS-compatible newsreader.

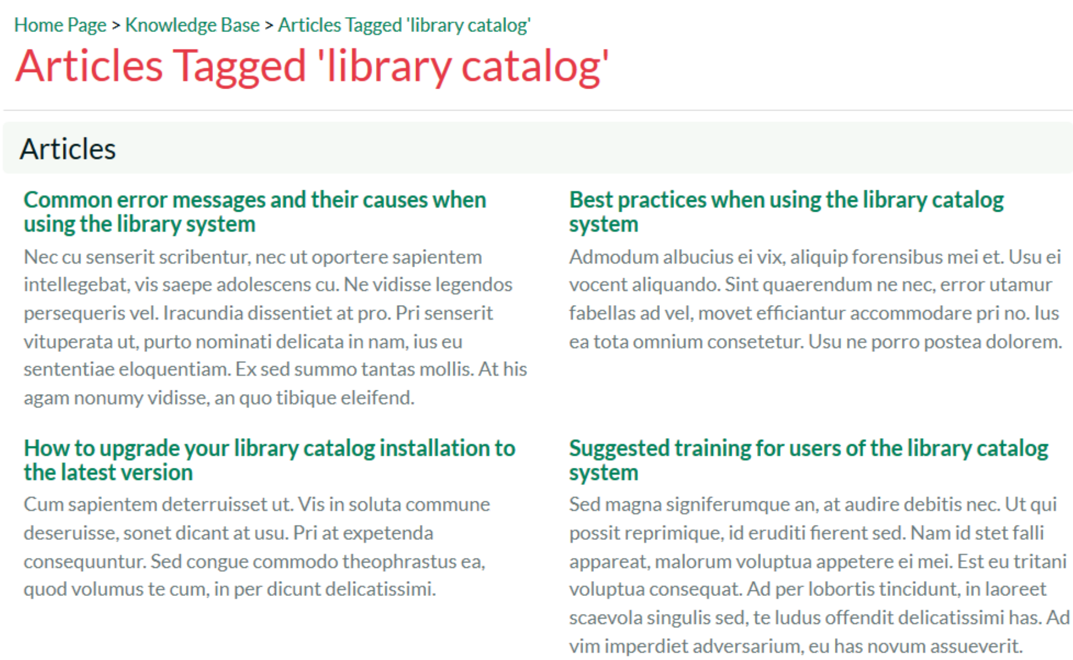
If you click on an article in the list, it will display the article details page described in section 4.2.

4.1.2. Tag Cloud

The tag cloud displays a list of all the tag names associated with knowledge base articles in the system. The size and color of the font is proportional to the number of articles associated with the tag.

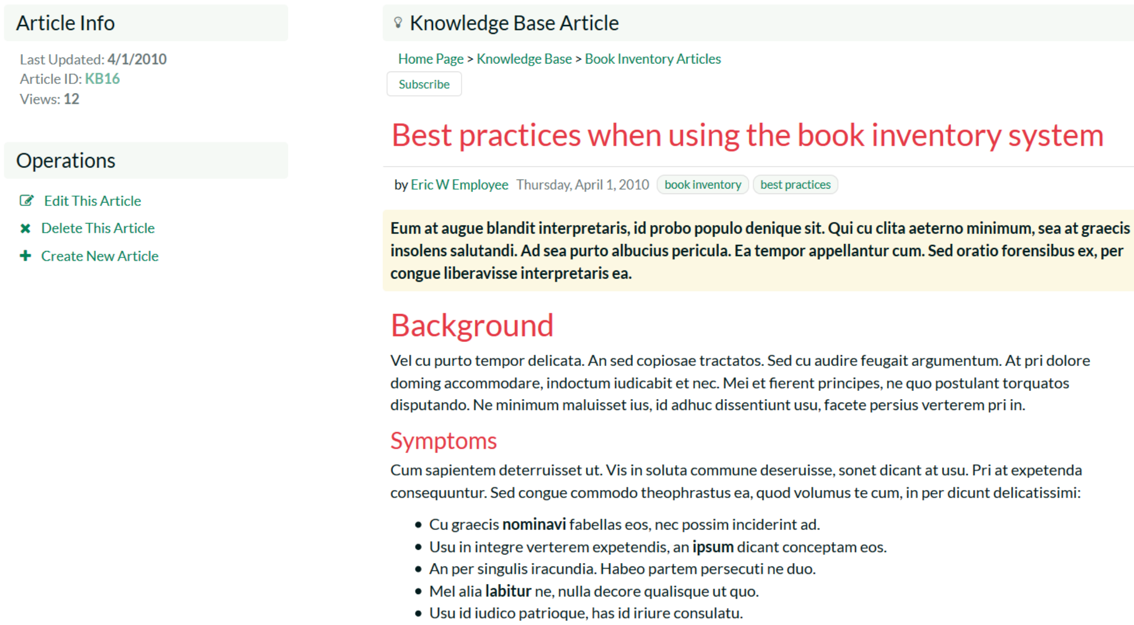


Clicking on a tag name will display a page listing all of the articles that use that tag:



4.2. Article Details

When you click on the name of an article, the article details page is displayed:

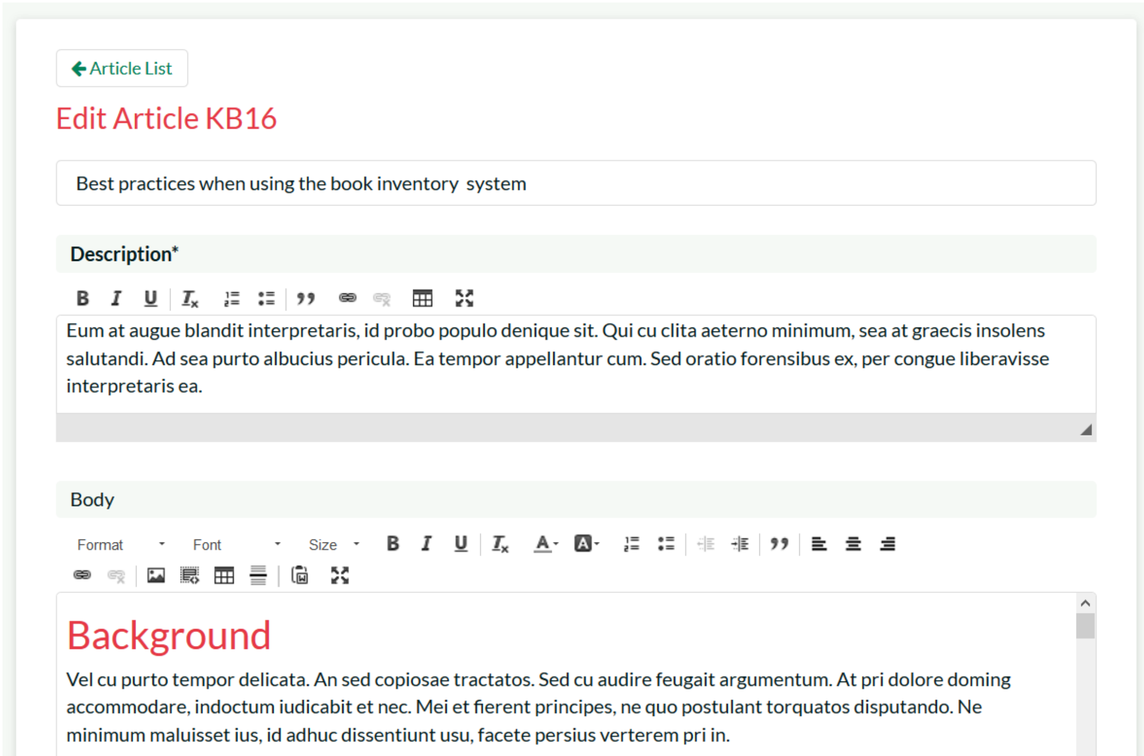


This page displays the following information:

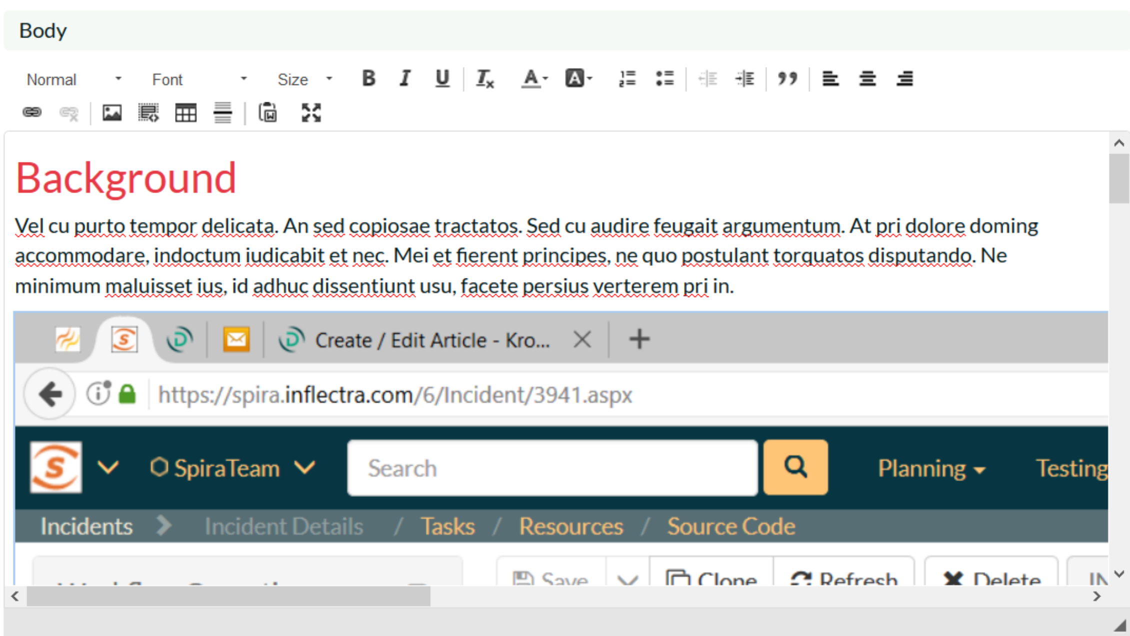
- **Article Breadcrumb** – The breadcrumb list at the top of the page displays the hierarchical list of categories and sub-categories that the article belongs user. If you click on one of the categories, the system will display of related articles in that category.
- **Knowledge Base Article** – This is the main part of the page and displays the name, short description and long description of the knowledge base article. If you click on the Subscription icon to the right of the article title, the article will be added to your list of subscribed knowledge base articles. Whenever a change is made to the article, you will receive an email notification.
- **Article Info** – This information pane displays the unique ID assigned to the article, the date it was last updated and the number of times that it has been viewed.
- **Tags** – This pane displays a list of the meta-tags associated with the current knowledge base article as well as an indication how many other knowledge base articles have been tagged with the same keywords. Clicking on the meta-tag name will automatically take you back to the knowledge base list page with the filter set to the tag name in question.
- **Operations** – This pane is only visible for customer support agents and will display options for creating a new article, deleting the current article or modifying the current article.
- **Links** – This section lets you see the links to related information associated with the article
- **Attachments** – This section lets you view the documents and screenshots attached to the current article.

4.2.1. Editing an Article

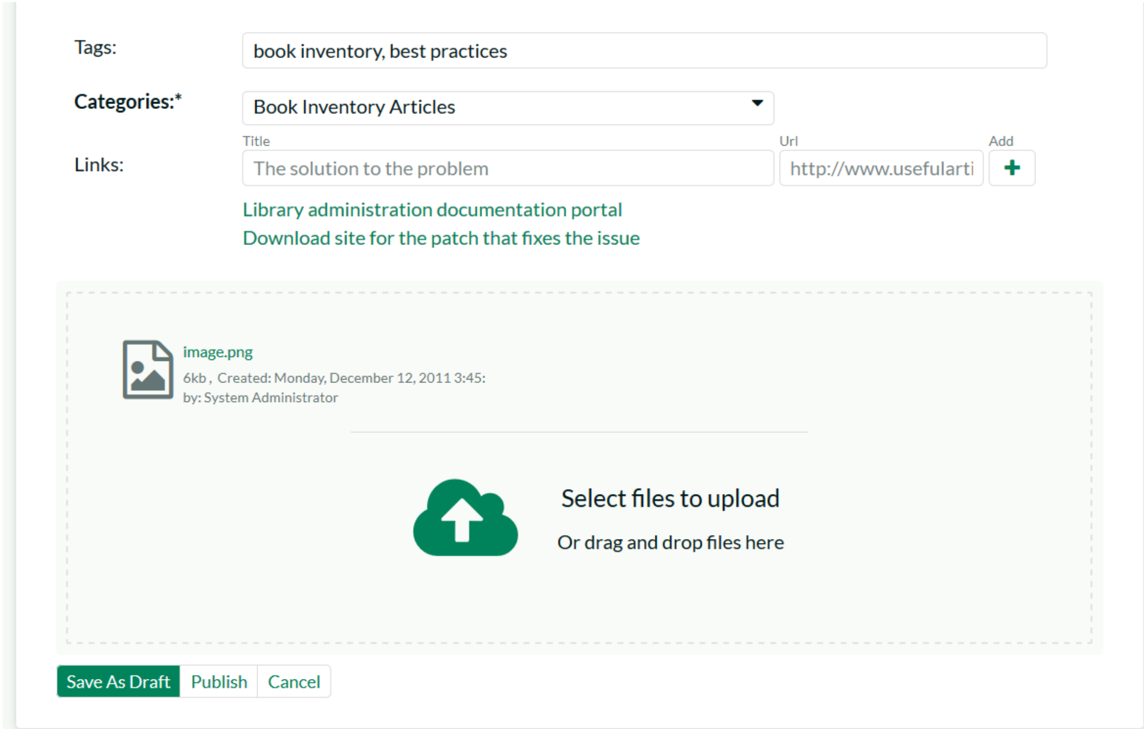
Clicking on the operation to “Edit this Article” will display the edit article screen:



You can change the name, description, body, tags and assigned categories for the article. To include a screenshot in the article text, simple paste in the image from the clipboard into the text editor and KronoDesk will capture the image, attach it to the article and embed the image for you:



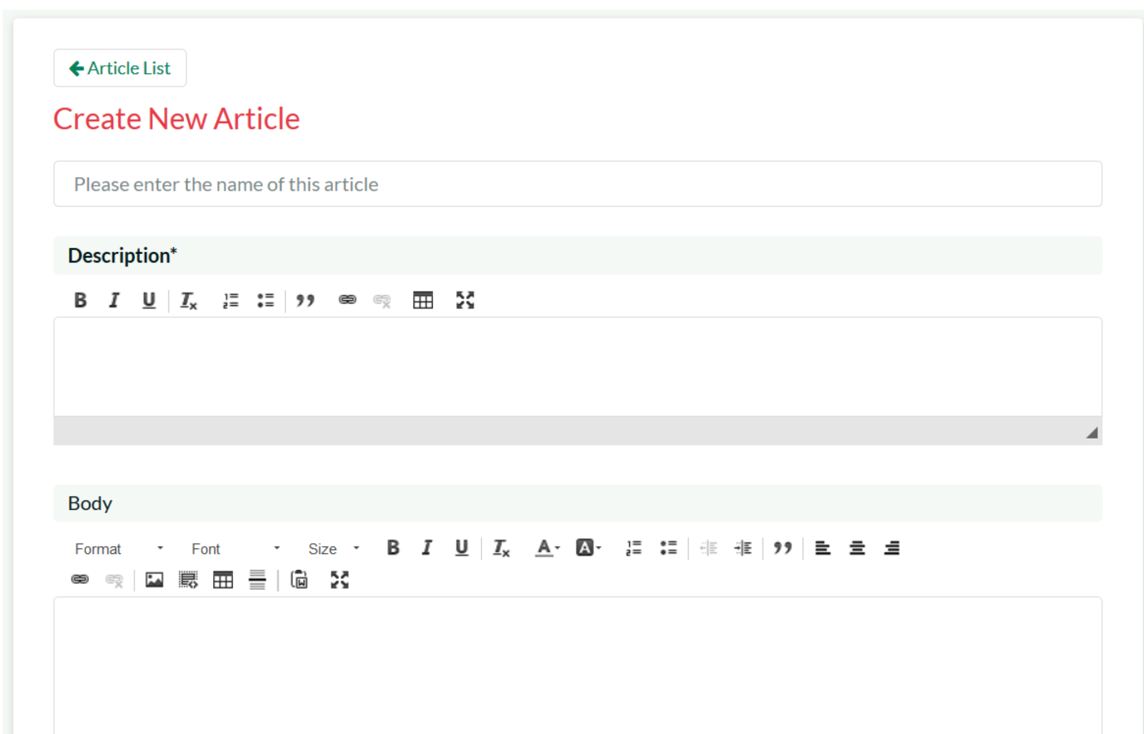
In addition, you can edit the hyperlinks associated with the article and attach documents to the article by simply dragging and dropping the file onto the special upload control:



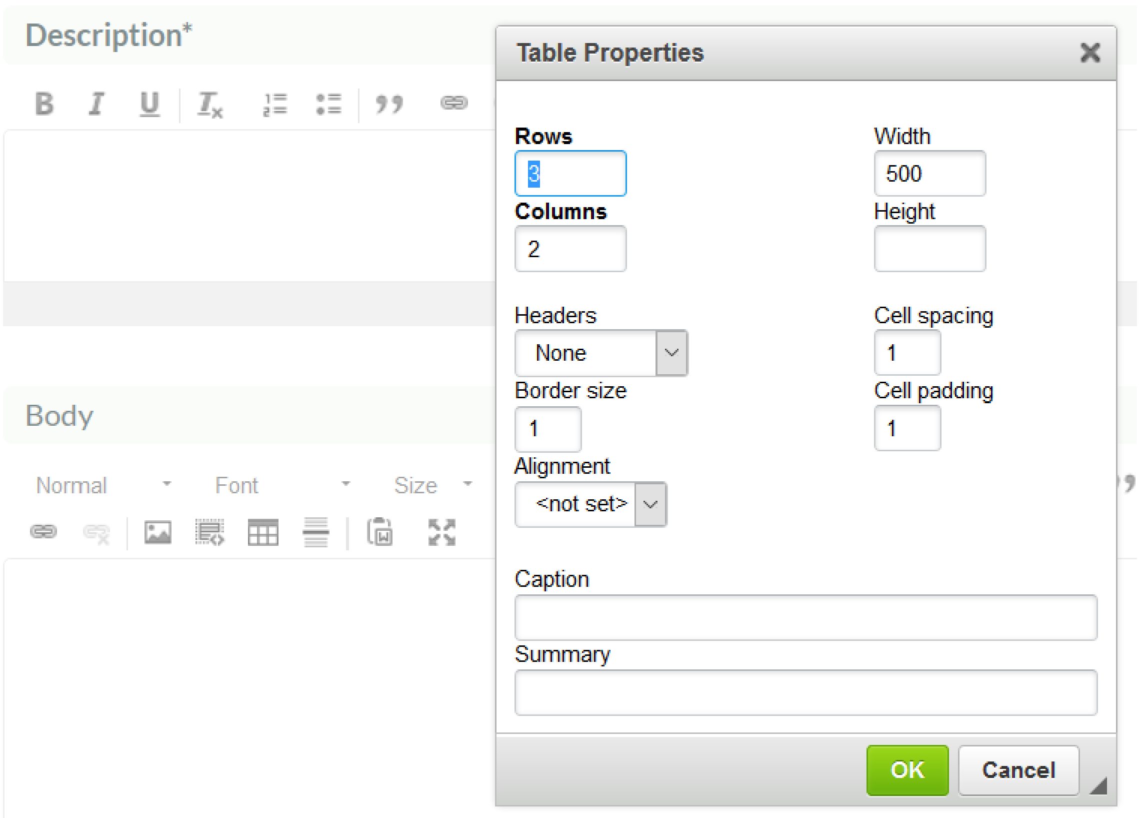
Once you are satisfied with your changes you can click either ‘Save As Draft’ to save the KB article and keep in the draft status, or click ‘Publish’ to save the changes and publish as a live article that can be searched on.

4.2.2. Creating an Article

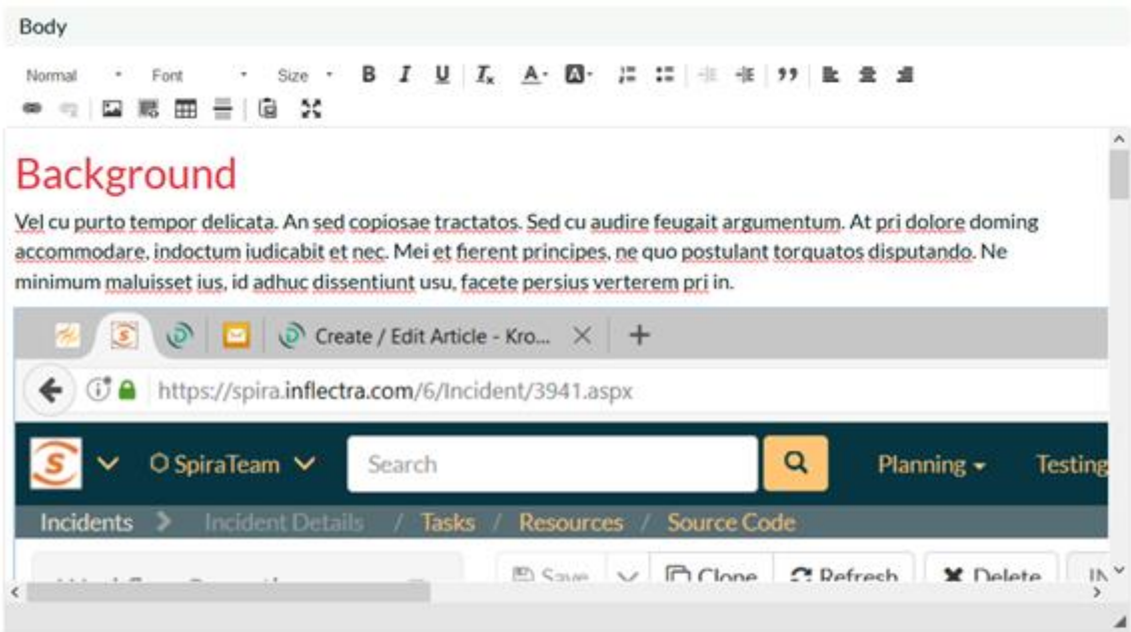
Clicking on the operation to “Create New Article” will display the new article creation screen:



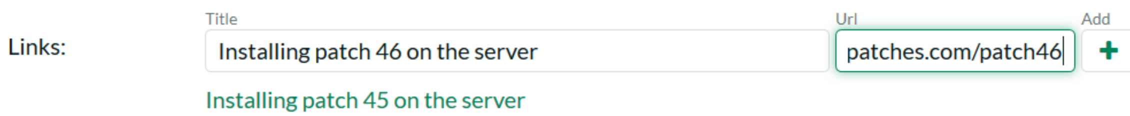
You need to enter the name, short description, body, tags and assigned categories for the article. KronoDesk uses a rich text editor for the description and body of the article so that you can enter formatted text, programming code, hyperlinks, tables with ease.



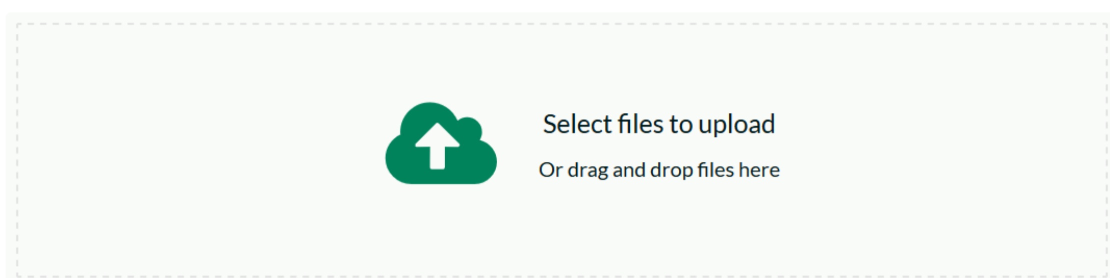
To include a screenshot in the article text, simple paste in the image from the clipboard into the text editor and KronoDesk will capture the image, attach it to the article and embed the image for you:



To add hyperlinks to the article, simply enter the name and URL and click the '+' button to add:



Finally, to attach a document to the article, you can either drag the file onto the upload control or click on the button to browse to a file on your local computer:



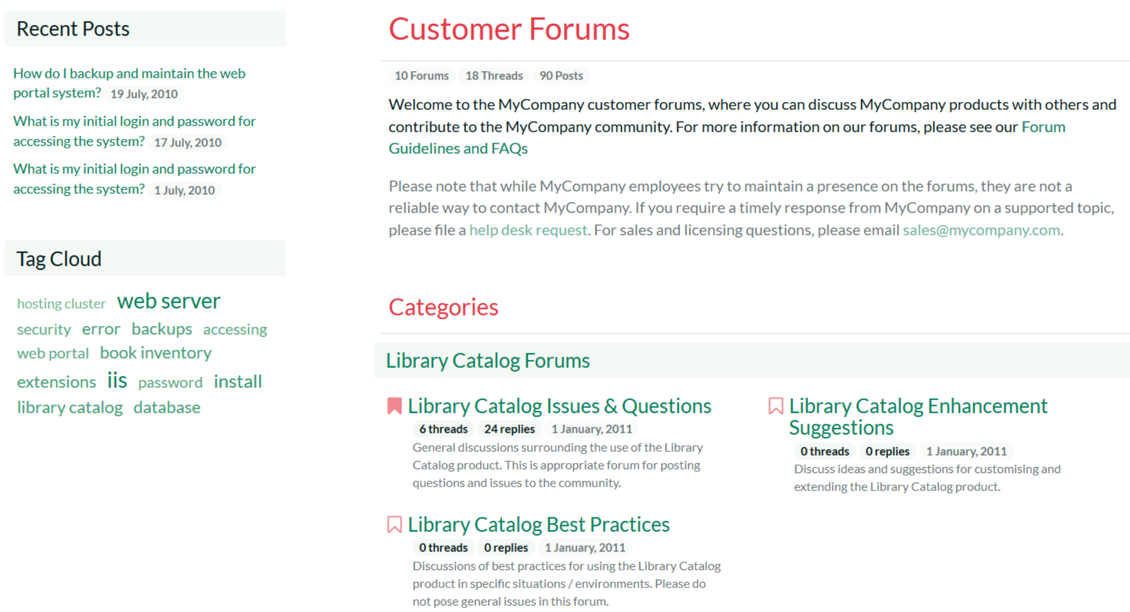
Once you are satisfied with your submission, you can click either 'Save As Draft' to save the KB article and keep in the draft status, or click 'Publish' to save the changes and publish as a live article that can be searched on.

5. Forums

The KronoDesk® support forums provide the next level of support to customers. Where a fully codified knowledge base article has not yet been synthesized and created by the support agents, the support forums provide a place where users can search for existing messages concerning the same problem. The support forums thereby provide a community where customers and support agents can post replies to common questions visible to the entire community.

5.1. Category List

When you click on the Forums option in the global navigation, you will be taken to the forum home page that displays a list of all the categories and associated forums, together with widgets that display recent posts, and a tag cloud:

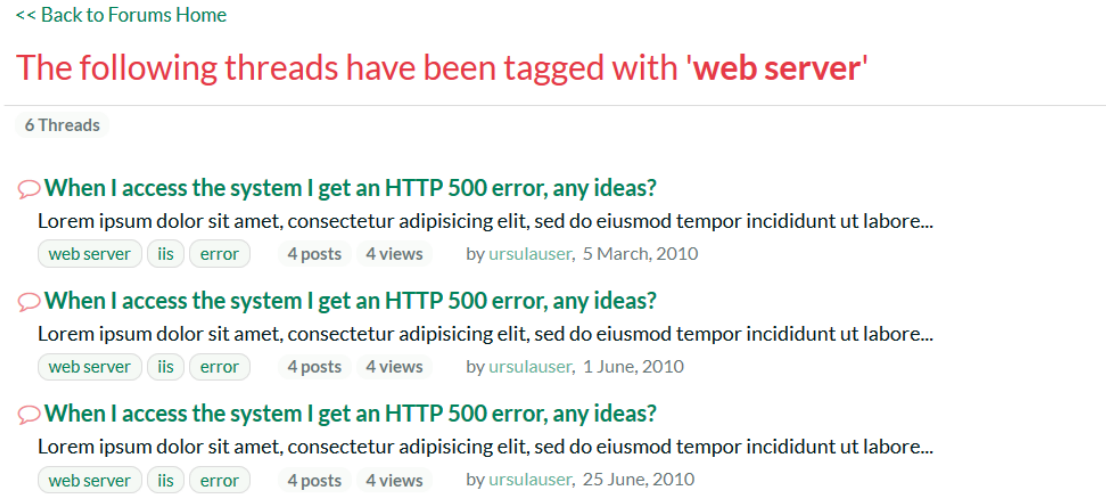


Each category will be displayed together with the list of active forums in the category. Each forum will be displayed along with the number of threads and replies in the forum as well as information describing the last post made in the forum.

If the forum icon is filled-in, it means that there is at least one new thread or reply in the forum that you have not already read. If the forum icon is not filled-in, it means that there are no new forums or replies since the last time you visited.

5.1.1. Tag Cloud

The tag cloud displays a list of all the tag names associated with forum threads in the system. The size of the font is proportional to the number of threads associated with the tag. Clicking on a tag name will take you to the following page that lists all the threads that have been tagged with the specific tag:

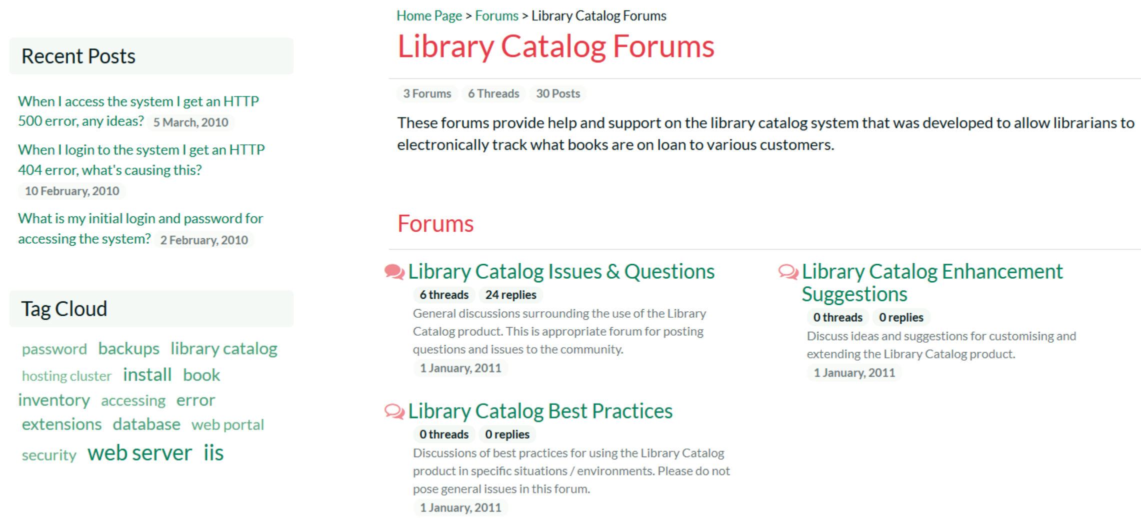


5.1.2. Recent Posts

This widget displays a list of the most recent forum posts in the system, including the name and date of the post. Positioning the mouse over the title will display a popup tooltip containing the long description of the post.

5.2. Category Details

If you click on the name of a category, it will bring up the category details page:

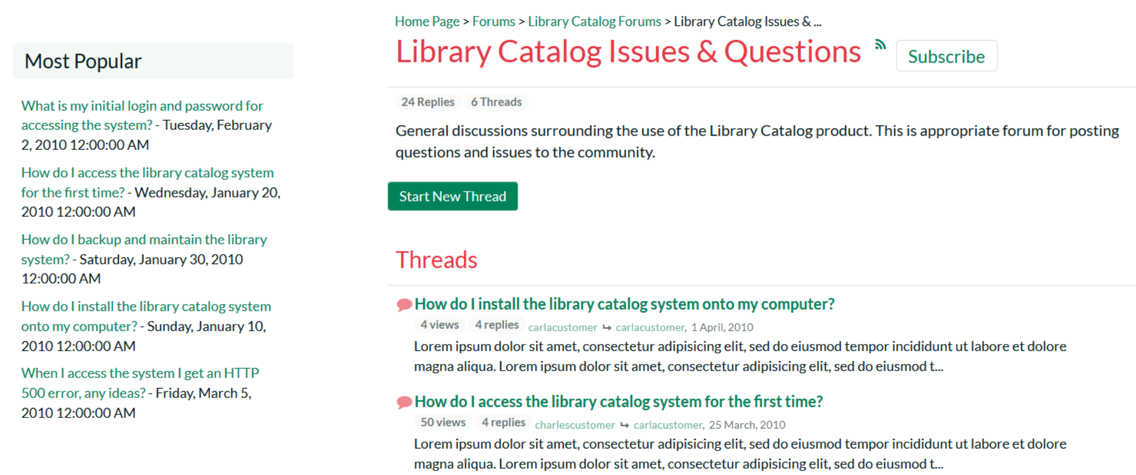


This page displays the selected category together with a list of active forums in the category. Each forum will be displayed along with the number of threads and replies in the forum as well as information describing the last post made in the forum. The **Recent Posts** widget will also be filtered to only include threads/posts from the current category. The **Tag Cloud** will show tags from all categories.

If the forum icon is filled-in, it means that there is at least one new thread or reply in the forum that you have not already read. If the forum is not filled-in, it means that there are no new forums or replies since the last time you visited.

5.3. Forum Details

If you click on the name of a forum, it will bring up the forum details page:



This page displays all the threads in the selected forum, together with the number of replies to the thread, the number of times the forum has been viewed and a description of the most recent reply to the thread.

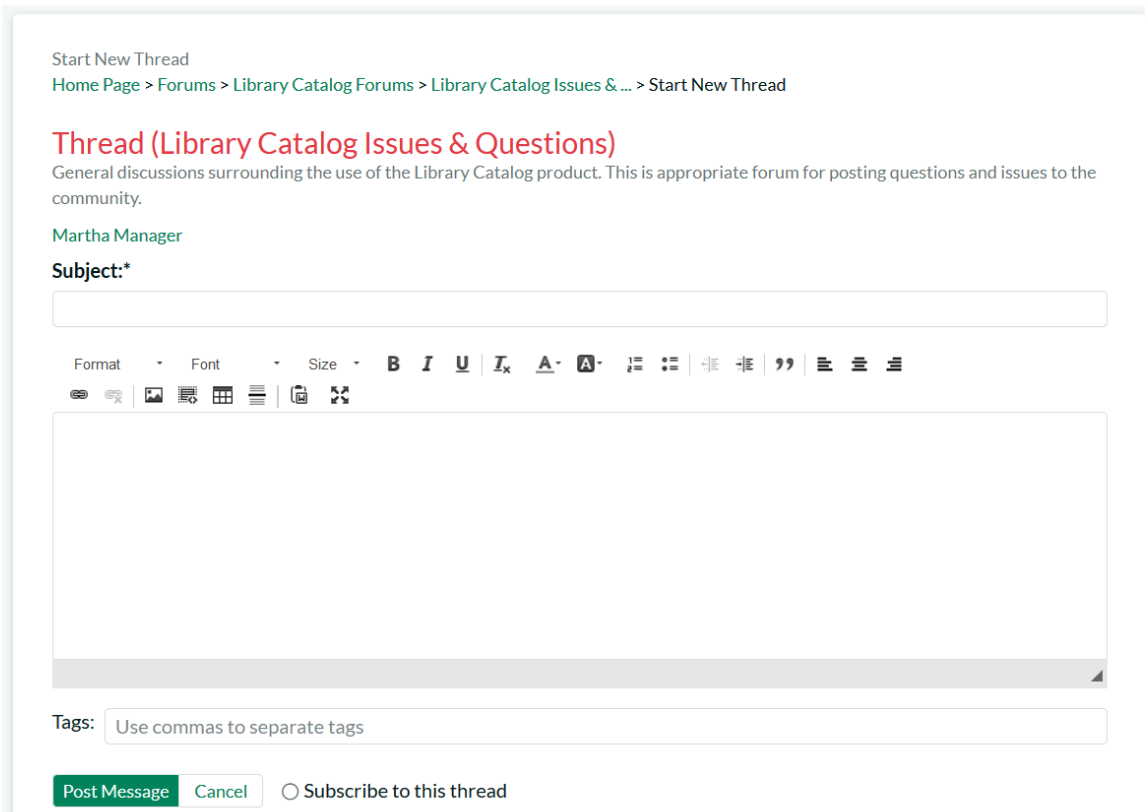
If the thread icon is filled-in, it means that there is either a new thread or there is at least one new reply that you have not already read. If the thread is not filled-in, it means that you have already viewed the thread and that there are no new replies since the last time you visited.

If you click on the RSS icon, you can subscribe to the current forum in an RSS-compatible newsreader. If you click on the “Subscription” hyperlink underneath the forum title, the forum will be added to your list of subscribed forums. Whenever a new thread is posted or a new reply occurs, you will receive an email notification.

In addition, the **Most Popular** widget displays a list of the forum threads that have been most frequently viewed by users of the system. Each thread is displayed with its title and date of publication. Positioning the mouse over the title will display a popup tooltip containing the long description of the thread.

5.3.1. Starting a New Thread

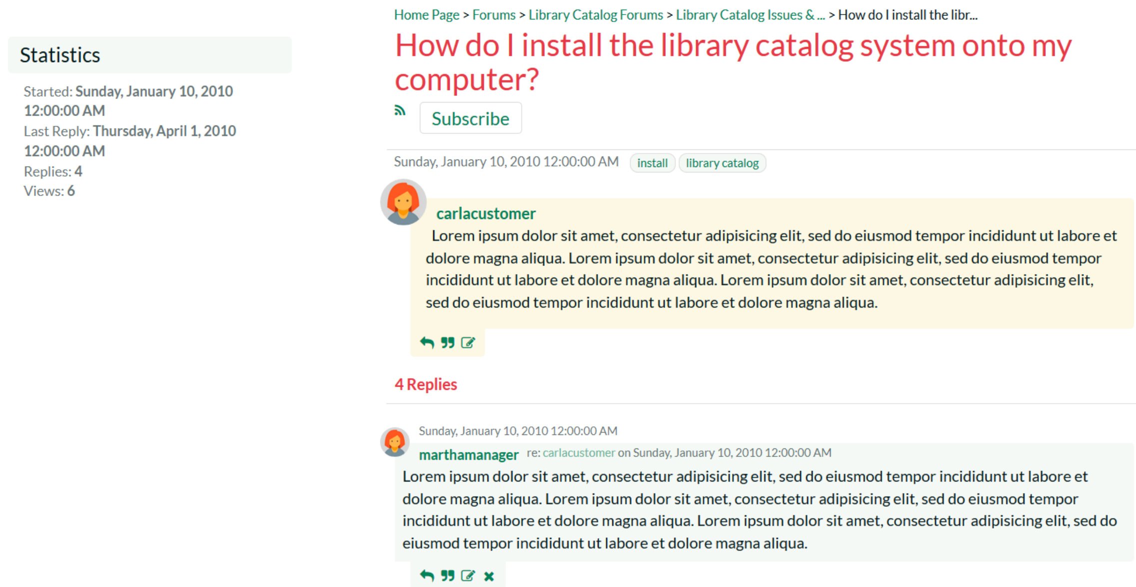
If you are logged in as an authenticated user, you can click on the “Start New Thread” hyperlink to create a new forum thread:



You need to enter the subject, description and meta-tags for the new thread. Once you are satisfied with your submission you should click the “Post Message” hyperlink to add the new thread to the forum. If you would like to subscribe to the new thread (and thereby get notified when someone replies), make sure to check the “Subscribe to this thread” box before submitting.

5.4. Thread Details

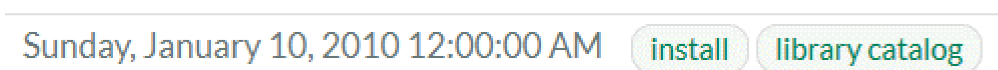
If you click on the name of a thread in the thread list, it will bring up the thread details page:



This page displays the subject and description of the thread together with a list of replies from different users. Each reply will be displayed along with information that describes whether the reply is a direct response to the thread itself or a reply to one of the other replies.

If you click on the RSS icon, you can subscribe to the current thread in an RSS-compatible newsreader. If you click on the “Subscribe” hyperlink underneath the thread title, the thread will be added to your list of subscribed threads. Whenever a new reply occurs, you will receive an email notification.

The tags section under the heading displays a list of the meta-tags associated with the current thread:



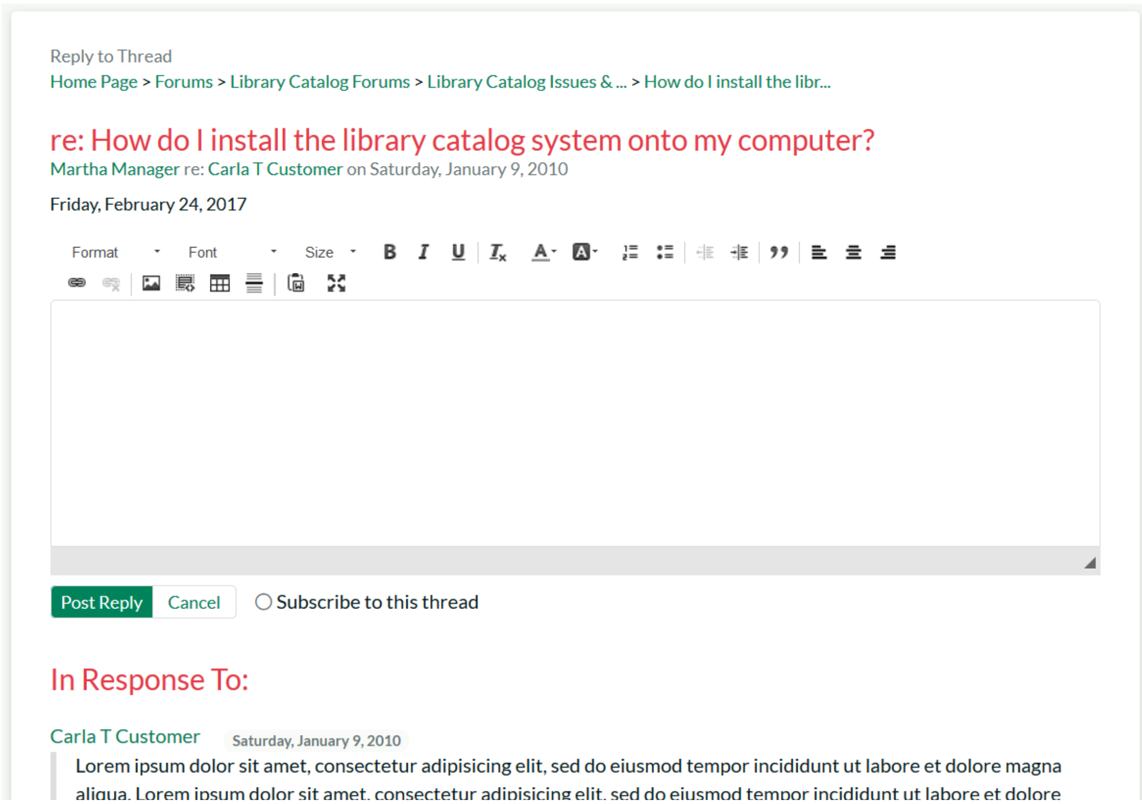
Clicking on the meta-tag name will automatically take you back to the thread search page where you can see a list of other threads that have been tagged with the same keyword.

Depending on your role, you will see different operations available for the thread and each of the individual replies:

- **Reply** – this allows you to reply to the thread or a specific message (see below)
- **Quote** – this allows you to reply to the thread or a specific message, quoting the text (see below)
- **Edit** – this allows you to make changes to the thread or reply (see below)
- **Delete** – this will delete the thread or reply

5.4.1. Reply to Thread

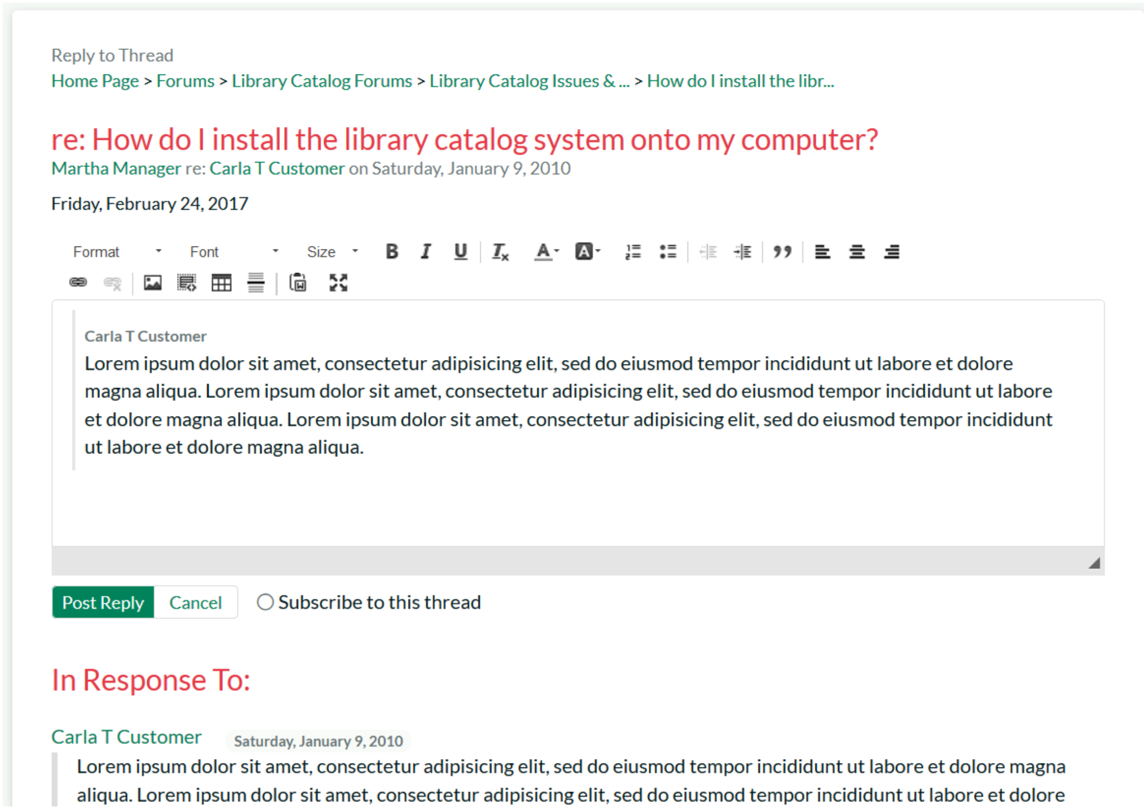
When you click on the “Reply” hyperlink it will display the following dialog:



You need to enter the description of your reply to the original post. Once you are satisfied with your submission you should click the “Post Reply” hyperlink to add the new response to the thread. If you would like to subscribe to the thread (and thereby get notified when someone replies), make sure to check the “Subscribe to this thread” box before submitting.

5.4.2. Reply to Thread with Quote

When you click on the “Quote” hyperlink it will display the following dialog:

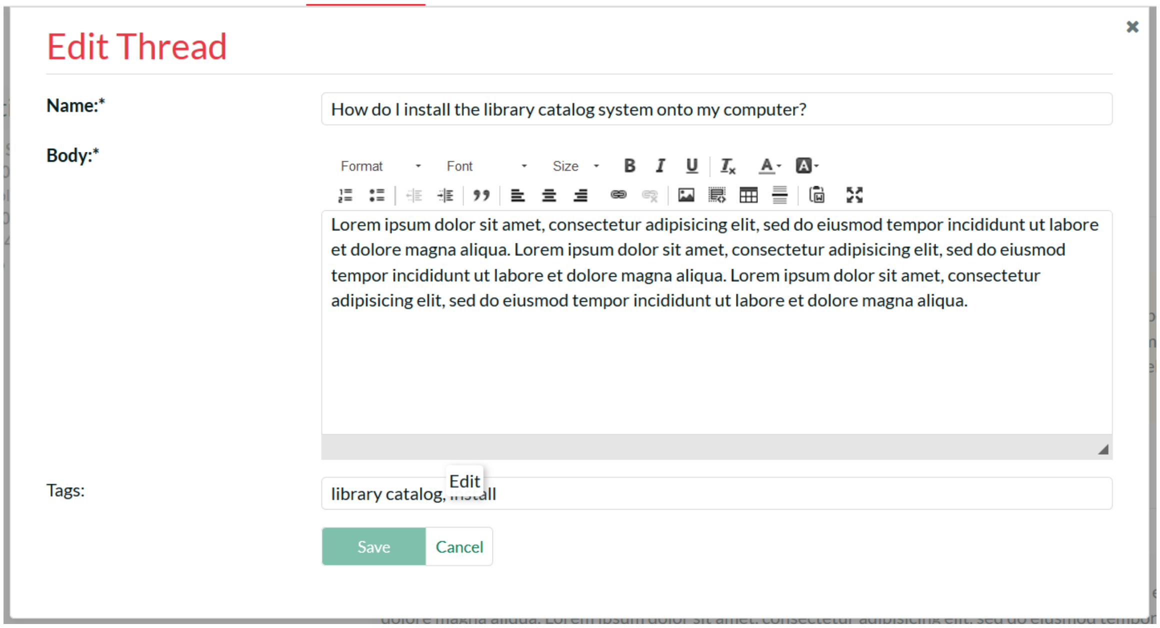


You need to enter the description of your reply to the original post. The original post or reply will be displayed inside a grey box. You can delete some of the text inside the box so that you can make it clear which part of the original message you are responding to.

Once you are satisfied with your submission you should click the “Post Reply” hyperlink to add the new response to the thread. If you would like to subscribe to the thread (and thereby get notified when someone replies), make sure to check the “Subscribe to this thread” box before submitting.

5.4.3. Editing a Thread/Reply

When you click on the “Edit” hyperlink it will display the following dialog:



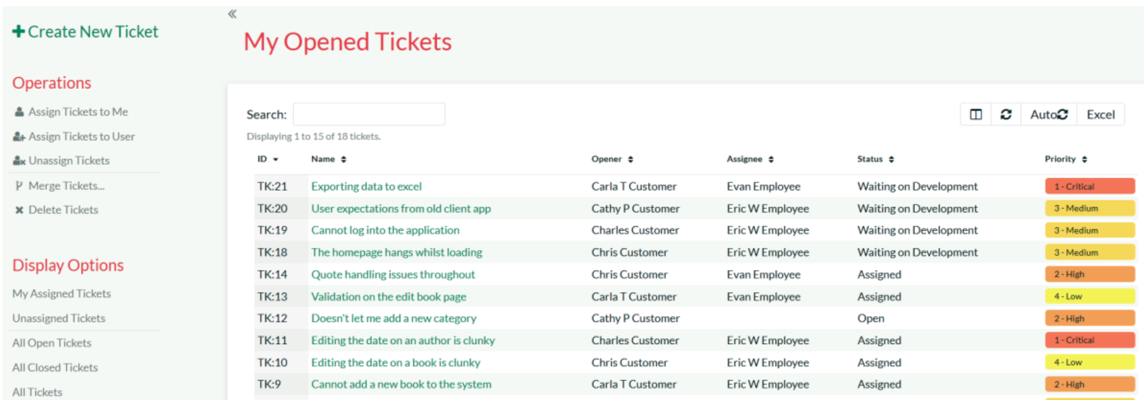
This page lets you edit a specific thread or reply in the forum. You can edit the subject, body and tags of the message. Once you are satisfied with your changes, click the [Save] button to commit the changes.

6. Help Desk

The KronoDesk® help desk ticket management system provides the final level of customer support. When a customer cannot readily find the solution through either the knowledge base or support forums, they can submit a help desk ticket through KronoDesk's help desk submission system. The system allows them to quickly and easily enter the description of the problem, attach any relevant documents or screenshots, categorize the issue and then submit it for resolution by the support agents.

6.1. Ticket List

When you click on the Help Desk option in the global navigation, you will be taken to the main help desk page:



This page displays on the left-hand side a list of display options for viewing the help desk. The available option will depend on your role in the system. In general customers can only see their submitted tickets whereas customer support agents can see all the tickets in the system.

The following display options are available:

- **My Assigned Tickets** – This displays a list of all the open tickets assigned to the current user.
- **Unassigned Tickets -** This displays a list of all the open tickets that are not assigned to any support agents.
- **My Opened Tickets -** This displays a list of all the open tickets that were opened by the current user.
- **My Closed Tickets -** This displays a list of all the closed tickets that were opened by the current user.
- **All Open Tickets** – This displays a list of all the open tickets regardless of who opened them or who they are assigned to.
- **All Closed Tickets -** This displays a list of all the closed tickets regardless of who opened them or who they are assigned to.
- **All Tickets -** This displays a list of all the tickets regardless of their status, who opened them or who they are assigned to.

In addition, there is an Operations pane that is displayed for support agents and lets you perform the following tasks:

- **Assign Tickets to Me** – If you select ticket(s) in the main grid and then click this option, it will assign the selected tickets to your user.

- **Assign Tickets to User** – If you select ticket(s) in the main grid and then click this option, it will allow you to assign the selected tickets to a specific customer agent.
- **Unassign Tickets** – If you select ticket(s) in the main grid and then click this option, it will return the ticket to the unassigned list.
- **Merge Tickets –** If you select two or more tickets in the grid (using SHIFT+click or CTRL+click) then click merge, the system will combine them into a single ticket for you.
- **Delete Tickets** – If you select ticket(s) in the main grid, then click this option, it will permanently delete the selected tickets. Typically this is only used for tickets generated from spam emails.

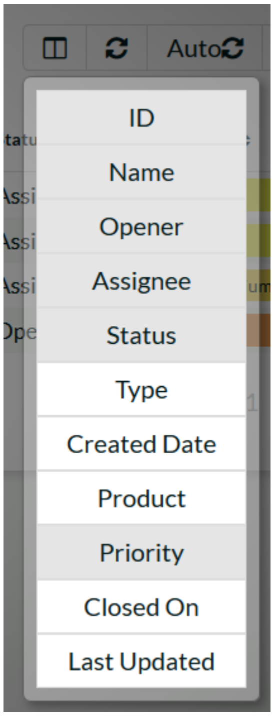
6.1.1. Filtering and Sorting

The main ticket grid allows you to filter and sort the ticket list. You sort a column by simply clicking on the arrow in the header row. To filter the ticket list, simply enter the text into the search box and the ticket list will be automatically filtered:

If you want to undo the filter, simply clear the filter and the full ticket list will be displayed.

6.1.2. Changing Columns

To show and hide different columns in the ticket grid, click on the columns icon above the grid and the column selector will be displayed:



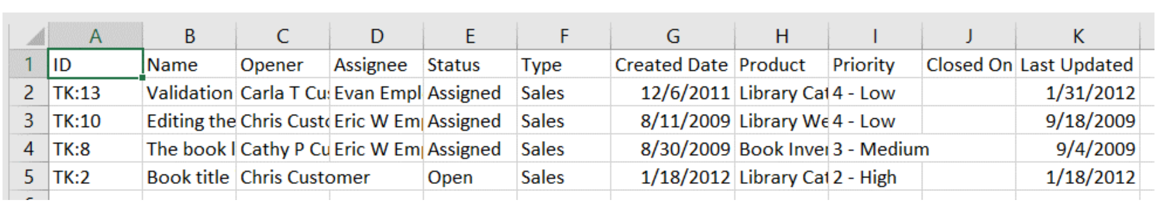
Once you have chosen the columns to display or hide simply click away from the dialog and the column selector will close and the grid will be reloaded with the new columns.

6.1.3. Auto-Refreshing

Sometimes as a support agent it is useful to have the ticket list auto-refresh every couple of seconds to ensure that you are seeing the most up-to-date information. Clicking on the “Auto Refresh” icon will enable this feature.

6.1.4. Export to Excel

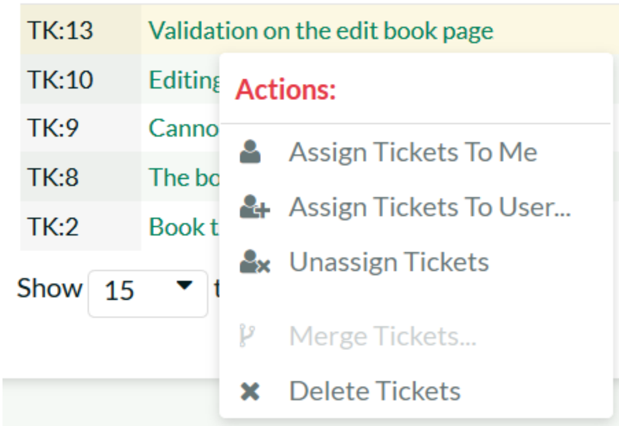
To export the current list of tickets to an Excel Comma Separated Values (CSV) file, simply click on the ‘Excel’ icon and the current ticket list will be exported into an MS-Excel compatible CSV file:



	A	B	C	D	E	F	G	H	I	J	K
1	ID	Name	Opener	Assignee	Status	Type	Created Date	Product	Priority	Closed On	Last Updated
2	TK:13	Validation	Carla T Cu	Evan Empl	Assigned	Sales	12/6/2011	Library Cat	4 - Low		1/31/2012
3	TK:10	Editing the	Chris Custo	Eric W Em	Assigned	Sales	8/11/2009	Library We	4 - Low		9/18/2009
4	TK:8	The book I	Cathy P Cu	Eric W Em	Assigned	Sales	8/30/2009	Book Inver	3 - Medium		9/4/2009
5	TK:2	Book title	Chris Customer		Open	Sales	1/18/2012	Library Cat	2 - High		1/18/2012

6.1.5. Context Menu

KronoDesk® provides a handy shortcut for performing frequent operations on the ticket list. Simply hover the mouse over the ticket grid and click the right mouse button. This brings up the context menu:

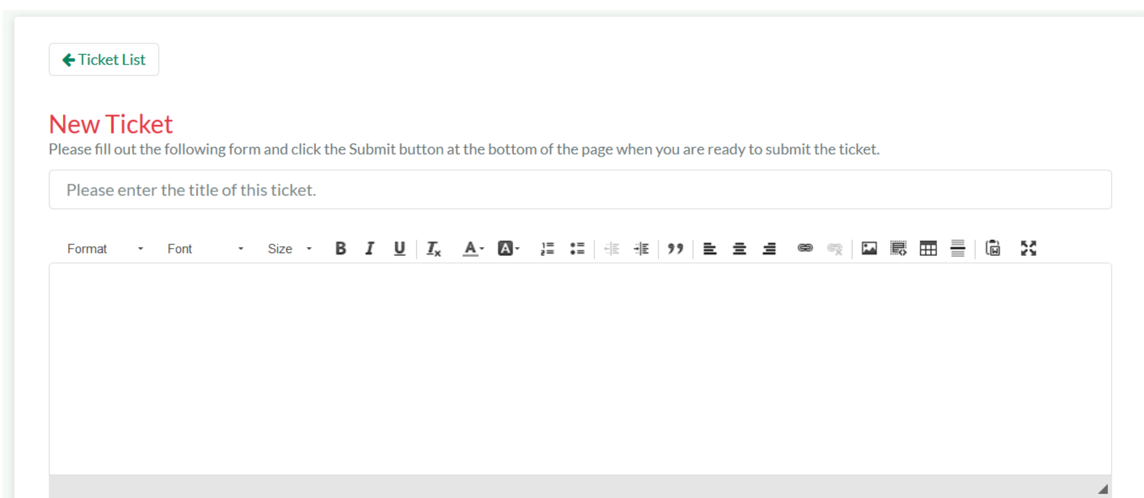


You can use this to perform the following operations:

- **Assign Tickets to Me** – If you select ticket(s) in the main grid and then click this option, it will assign the selected tickets to your user.
- **Assign Tickets to User** – If you select ticket(s) in the main grid and then click this option, it will allow you to assign the selected tickets to a specific customer agent.
- **Unassign Tickets** – If you select ticket(s) in the main grid and then click this option, it will return the ticket to the unassigned list.
- **Merge Tickets –** If you select two or more tickets in the grid (using SHIFT+click or CTRL+click) then click merge, the system will combine them into a single ticket for you.
- **Delete Tickets** – If you select ticket(s) in the main grid, then click this option, it will permanently delete the selected tickets. Typically this is only used for tickets generated from spam emails.

6.2. Create New Ticket

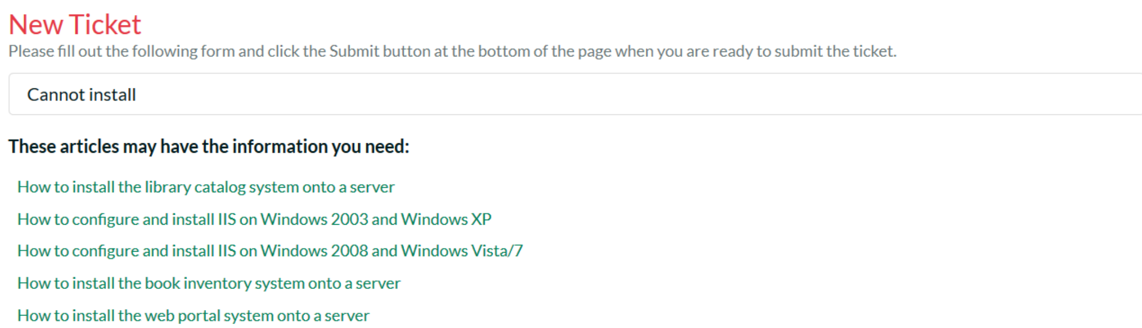
If you click on the hyperlink to “Create New Ticket”, the system will display the new help desk ticket entry page:



This page displays the following information:

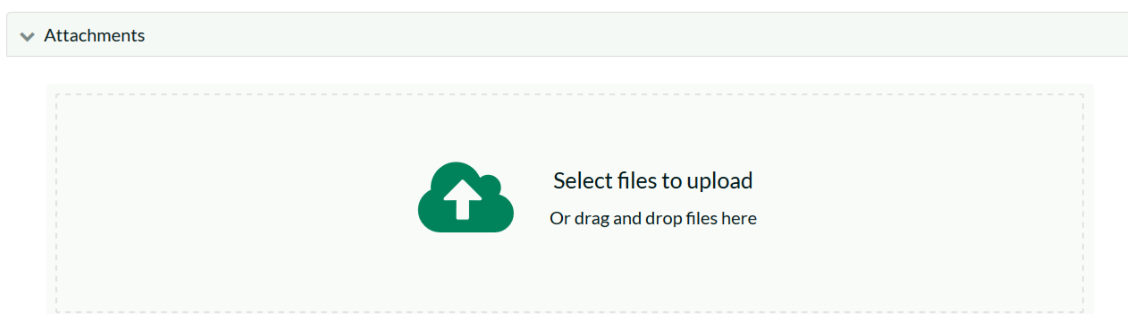
- **Ticket Name/Description** – This section of the page allows you to enter the name and long description of your support issue. The long description allows formatted text and can include lists, tables and hyperlinks.
- **Ticket Fields –** This section displays all the fields that need to be filled out when submitting the ticket. The fields that are required are displayed in **bold type** with an asterisk(*) next to the field name. When you change the product name field that may change the workflow associated with the ticket. If that happens, you will see some of the fields change.
This is normal and allows the administrator to tailor the fields required to the type of product (e.g. a web application may need you to enter the browser type, whereas a mobile application would need to know the cellphone network)
- **Attachments** – This section is described in more detail below in section 6.2.1.

As you start entering information in the ticket, KronoDesk will dynamically search the knowledge base to see if there are any articles that could answer your question:

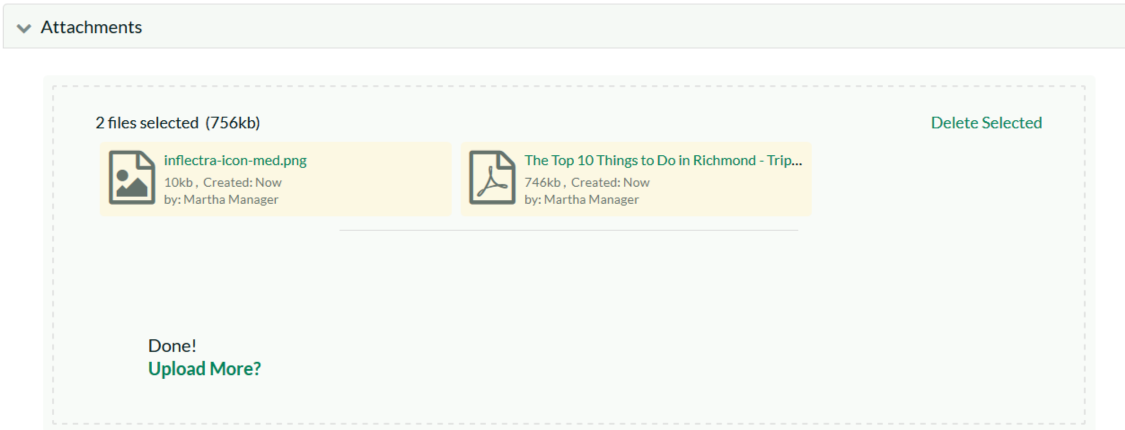


6.2.1. Adding a Document Attachment

When you first expand on the Attachments panel, it will display an empty list (since there will no documents attached to a new ticket):



As you add documents, they will appear in this control. To add a new document attachment to the ticket, either drag and drop the files onto this control or click on the arrow to browse your local file system. Once the documents are attached they will appear in the control:



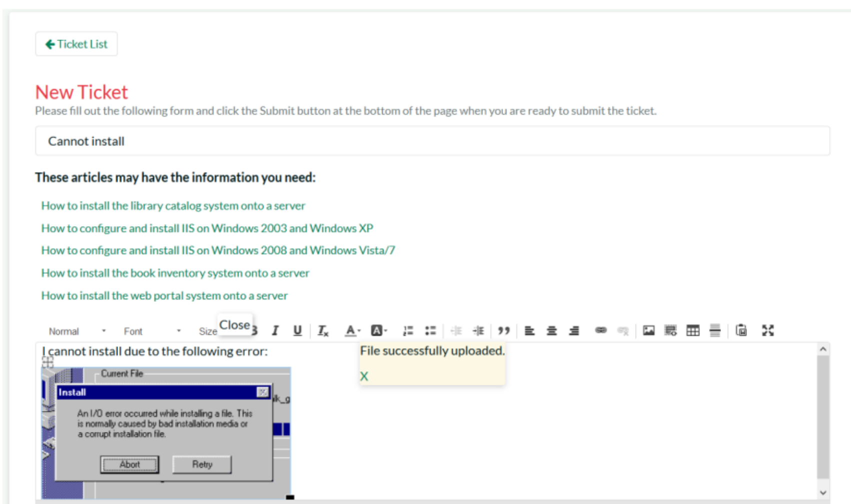
You can remove any items by selecting the item and clicking "Delete Selected".

Note: The system uses file extensions to identity the type of file, so if your local operating system doesn't use file extensions, you may want to rename the file before uploading (e.g. changing MyDocument to MyDocument.pdf to identity it as an Acrobat document).

6.2.2. Adding a Screenshot

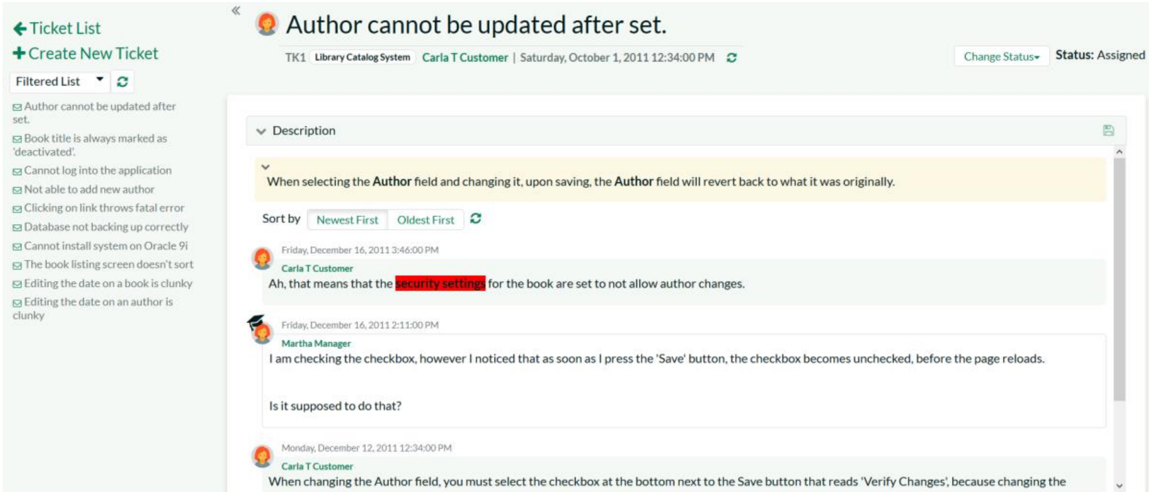
To include a screenshot in your ticket, first copy the image to your computer's clipboard (e.g. on Windows computers, the PRINT SCREEN button captures the current page and adds to the clipboard). Once the image is in the clipboard, position the cursor in the ticket Description text box where you want it to appear and then click CTRL+V to paste the image.

The image will then be attached to the ticket and embedded in the rich text box:



6.3. Ticket Details

If you click on the hyperlink for a specific ticket in either the main ticket list page, one of the user dashboards, or the navigation sidebar, you will be taken to the details page for the specific ticket:



This page is made up of three areas; the left pane is the navigation window where you can quickly jump to other tickets, the upper part of the right pane contains the ticket name and other important meta-data, and the bottom part of the right pane displays panels that contain information associated with the ticket:

- **Description** – this panel contains the description of the original ticket plus a list of all the notes added by support personnel and the original submitter.
- **Add Note** – This panel lets you add a new comment/note to the ticket.
- **Ticket Fields** – This panel displays the various ticket attributes that can be set
- **Attachments** – This panel lets you view the existing documents and screenshots attached to the ticket as well as add additional items
- **Incidents** – If you have the integration with SpiraTeam® enabled, this panel will display a list of product incidents (defects, bugs, change requests, etc.) related to the current ticket.
- **History** – This panel shows you the change history for the ticket.

Each of these panels is described in more detail below.

The navigation pane consists of a link that will take you back to the ticket list, as well as a list of the peer tickets to the one selected. This latter list is useful as a navigation shortcut; you can quickly view the peer tickets by clicking on the navigation links without having to first return to the ticket list page. The navigation list can be switched between four different modes:

- The list of tickets matching the current filter
- The list of all tickets, irrespective of the current filter
- The list of tickets assigned to the current user
- The list of tickets opened by the current user

When editing an existing ticket, the fields that are available and the fields that are required will depend on your stage in the ticket workflow. For example an open ticket might not require an "Assignee" whereas an assigned ticket typically would. The types of change allowed and the email notifications that are sent will depend on how the system administrator has configured the workflow. Administrators should refer to the *KronoDesk Administration Guide* for details on configuring the ticket workflows to meet their needs.

Depending on the user's role and whether they are listed as the opener or assignee of the ticket, displayed in the top-right hand side of the page, is a dropdown list with the allowed workflow operations:

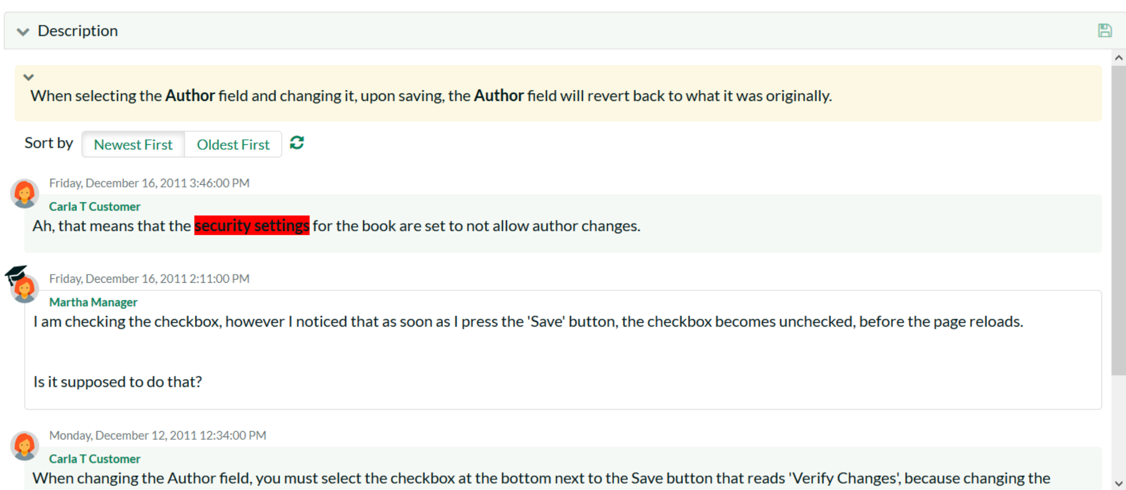
These workflow transitions allow the user to move the ticket from one status to another. For example in the default workflow, when the ticket is in the Assigned status, you will be given the options to:

- **Unassign Ticket** – changes status to “Open”
- **Propose Solution** – changes the status to “Waiting on Customer”
- **Request More Information** - changes the status to “Waiting on Customer”
- **Send to Development** - changes the status to “Waiting on Development”
- **Mark as Duplicate** - changes the status to “Duplicate”
- **Not Reproducible** - changes the status to “Non-Issue”

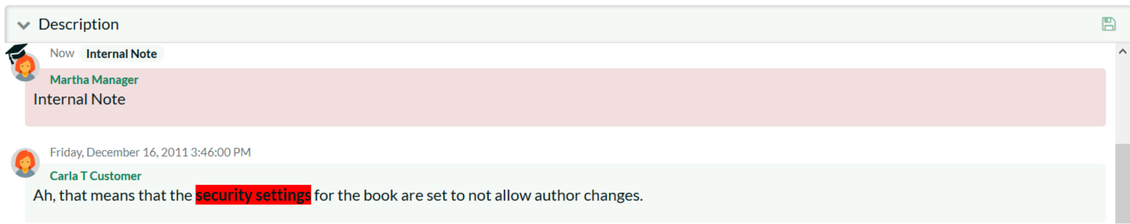
After changing the status of the ticket by clicking on the workflow link, you can then fill in the additional fields that are now enabled and/or required. Once you’ve made the changes to the appropriate ticket fields, you can either click one of the save icons to commit the changes or “Refresh” to discard the changes and reload the ticket from the database.

6.3.1. Description

The Description panel displays the original message in a yellow background with the various notes from support personnel and end users listed afterwards. The notes can be sorted by ‘most recent’ or ‘oldest’ first. The avatars from internal users are displayed with a black academic hat icon to denote that they are internal users.

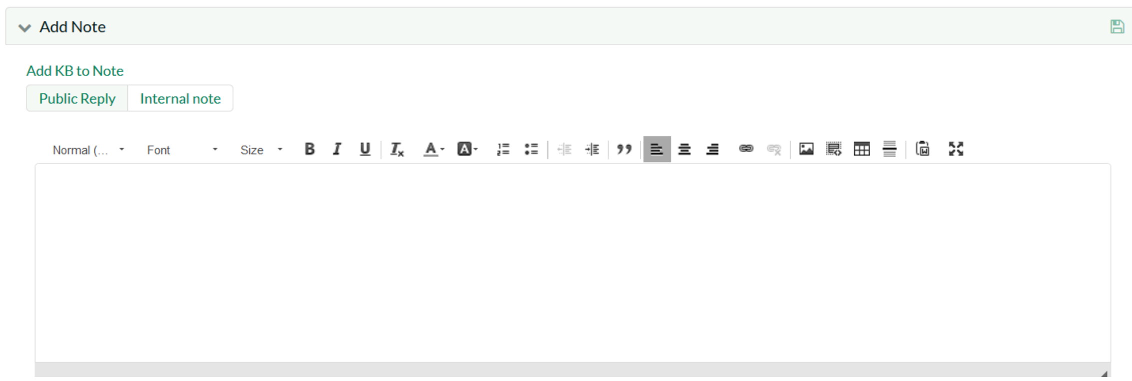


In addition, any notes that are ‘internal only’ and therefore only visible to the customer support agents, are displayed with a red background:



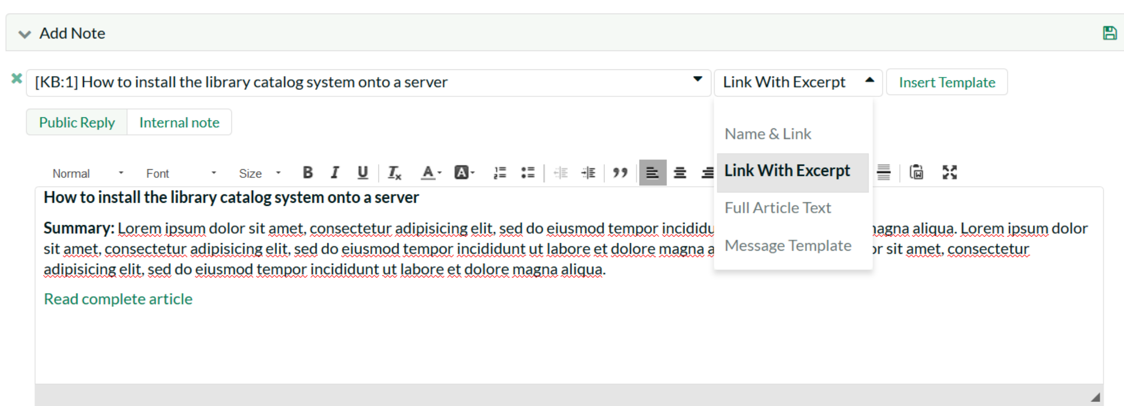
6.3.2. Add Note

This panel allows you to add a new comment/note to the help desk ticket:



You need to enter the note text in the rich-text box and click the [Save] icon to add the note to the ticket.

If you would like to insert a Knowledge Base (KB) article into your reply to the user, you can click on the link “Add KB to Note”:



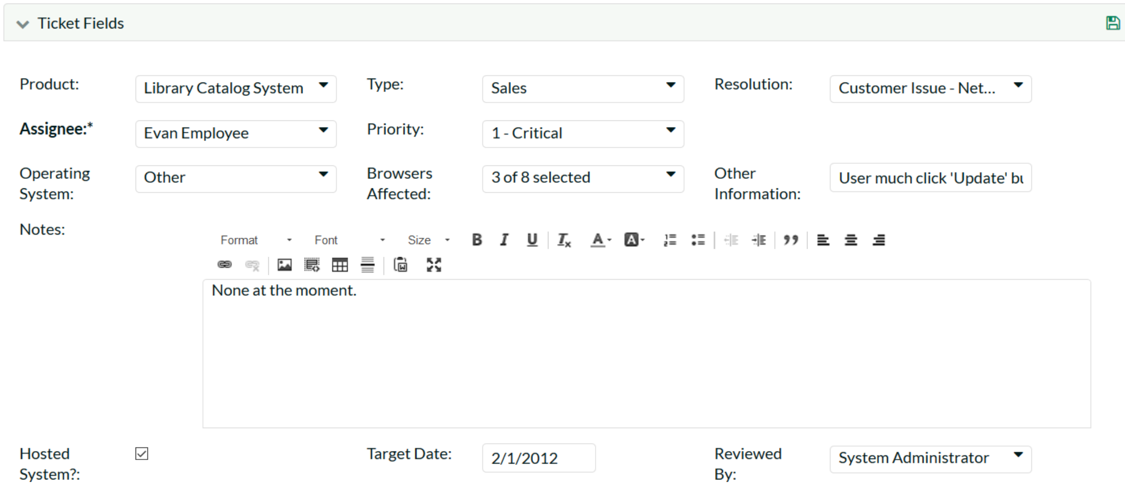
You then select the KB article from the available list, choose the type of link to insert (name and link only, full article text, etc.). Then click the ‘Insert Template’ to populate the note with the KB article link/text.

To include a screenshot in your note, first copy the image to your computer’s clipboard (e.g. on Windows computers, the PRINT SCREEN button captures the current page and adds to the clipboard). Once the image is in the clipboard, position the cursor in the Note text box where you want it to appear and then click CTRL+V to paste the image.

The image will then be attached to the ticket and embedded in the note text.

6.3.3. Ticket Fields

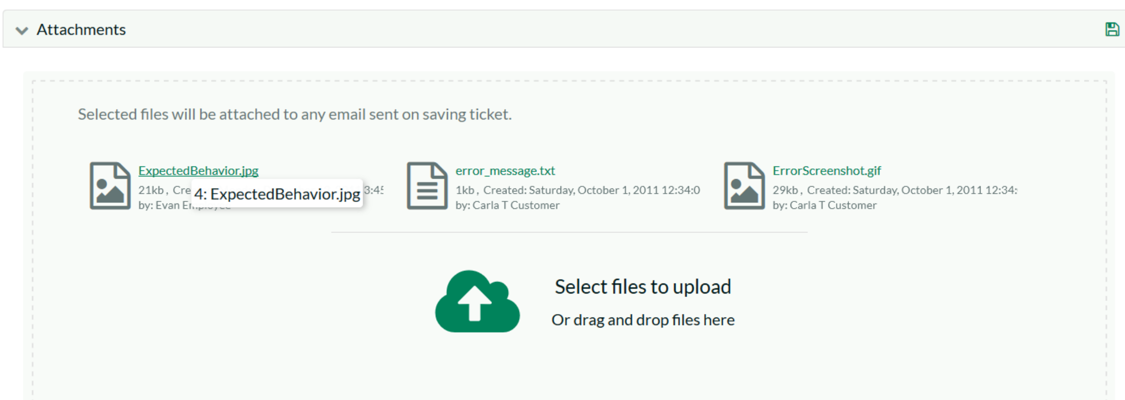
This panel displays all the fields associated with the help desk ticket:



The list of fields will include both standard fields that are part of the system and any custom fields defined by the administrator of the system. Depending on the product selected and the status of the ticket, different fields may be visible, enabled and/or required. Required fields are indicated in **bold type** with an asterisk (*) next to their name.

6.3.4. Attachments

This panel displays the list of documents and screenshots that have been "attached" to the help desk ticket. The documents can be in any format, though KronoDesk® will only display the icon for certain known types:



The attachment list includes the filename/URL that was originally uploaded together with the file-size (in KB), name of the person who attached it and the date uploaded.

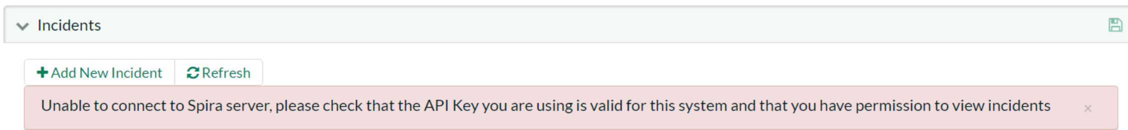
To actually view the document, simply click on the filename hyperlink and a new web browser window will open. Depending on the type of file, this window will either display the document / web-page or prompt you for a place to save it on your local computer. To remove an existing attachment from a ticket, simply select the item and click the [Delete] button.

To attach a new document to the ticket, you simply drag them onto the attachment upload control or click on the upload button and then browse to find the file on your local filesystem.

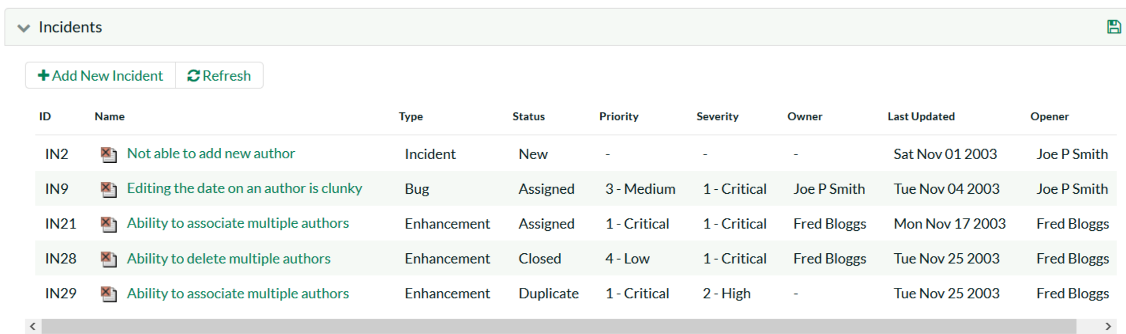
Note: The system uses file extensions to identity the type of file, so if your local operating system doesn't use file extensions, you may want to rename the file before uploading (e.g. changing MyDocument to MyDocument.pdf to identity it as an Acrobat document).

6.3.5. Incidents

The incidents panel displays a list of SpiraTeam® incidents that are linked to the current help desk ticket. If you see the following message, it means that your user profile in KronoDesk has not been linked to an equivalent SpiraTeam user profile. To fix the issue, click on the “user profile” link and enter your SpiraTeam RSS Token into your KronoDesk user profile. This is described in more detail in section 7.1



Once your KronoDesk user is linked to a corresponding SpiraTeam user, you will see a list of SpiraTeam incidents that were generated from the current ticket:

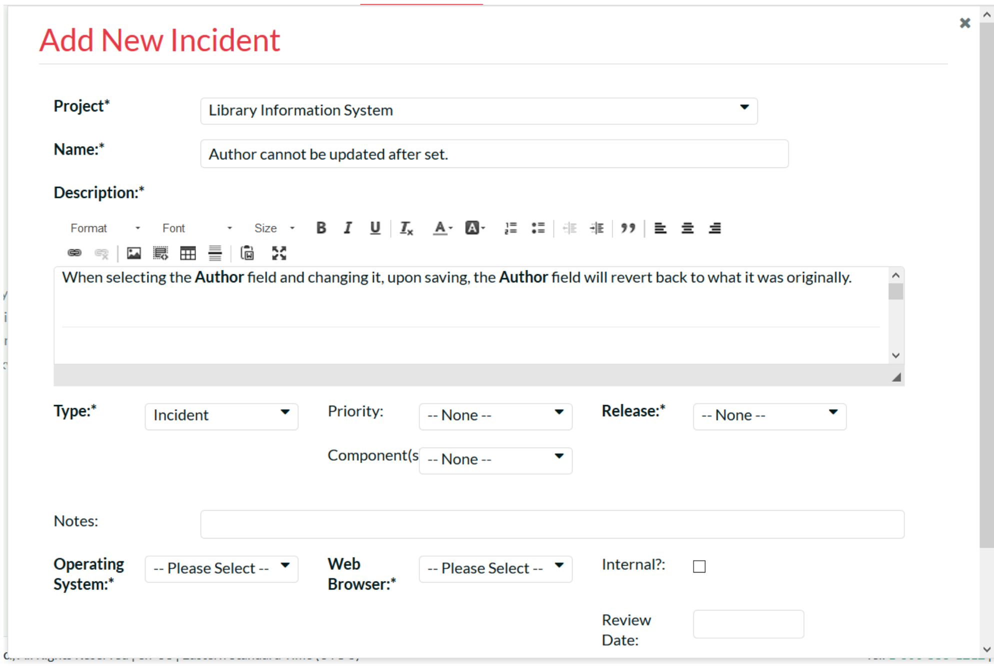


ID	Name	Type	Status	Priority	Severity	Owner	Last Updated	Opener
IN2	Not able to add new author	Incident	New	-	-	-	Sat Nov 01 2003	Joe P Smith
IN9	Editing the date on an author is clunky	Bug	Assigned	3 - Medium	1 - Critical	Joe P Smith	Tue Nov 04 2003	Joe P Smith
IN21	Ability to associate multiple authors	Enhancement	Assigned	1 - Critical	1 - Critical	Fred Bloggs	Mon Nov 17 2003	Fred Bloggs
IN28	Ability to delete multiple authors	Enhancement	Closed	4 - Low	1 - Critical	Fred Bloggs	Tue Nov 25 2003	Fred Bloggs
IN29	Ability to associate multiple authors	Enhancement	Duplicate	1 - Critical	2 - High	-	Tue Nov 25 2003	Fred Bloggs

Each incident is displayed together with its incident ID, name, type, status, priority, severity, owner, last update date and the name of the person who opened. Clicking on the incident hyperlink will open up the incident in SpiraTeam in a new window.

This allows support agents to view the status of the incidents use it to determine when the ticket can be resolved because the underlying product issue has been resolved.

To log a new incident in SpiraTeam based on the current help desk ticket, you need to click on the “Add New Incident” hyperlink, which will open up the following dialog:



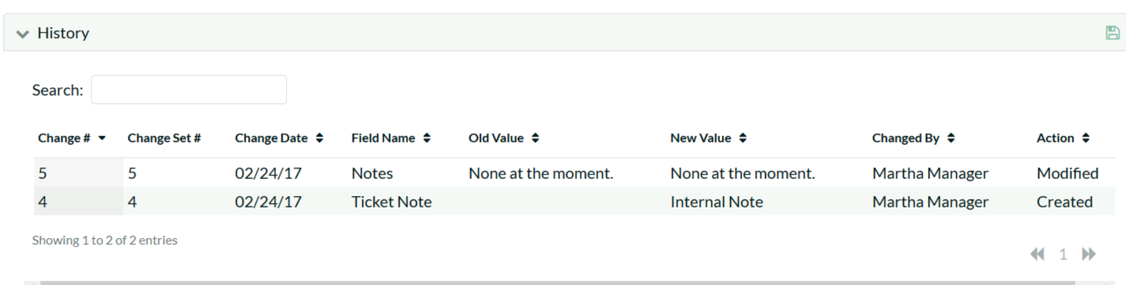
This dialog lets you add a new incident to the linked instance of SpiraTeam. You need to first choose the SpiraTeam project from the dropdown list at the top. The system will prepopulate the name and description of the incident with the ticket name and description. You can edit this text or clear it completely and enter in custom content.

You then need to choose the incident type, priority, detected release, component and owner followed by values for any of the defined custom properties. Once you are satisfied, click "Upload" to add the new incident to SpiraTeam. Once the incident has been added, it will appear in the KronoDesk incident list.

Note: You need to make sure that the SpiraTeam user that you have associated with your KronoDesk profile has permissions to create new incidents in that project in SpiraTeam.

6.3.6. History

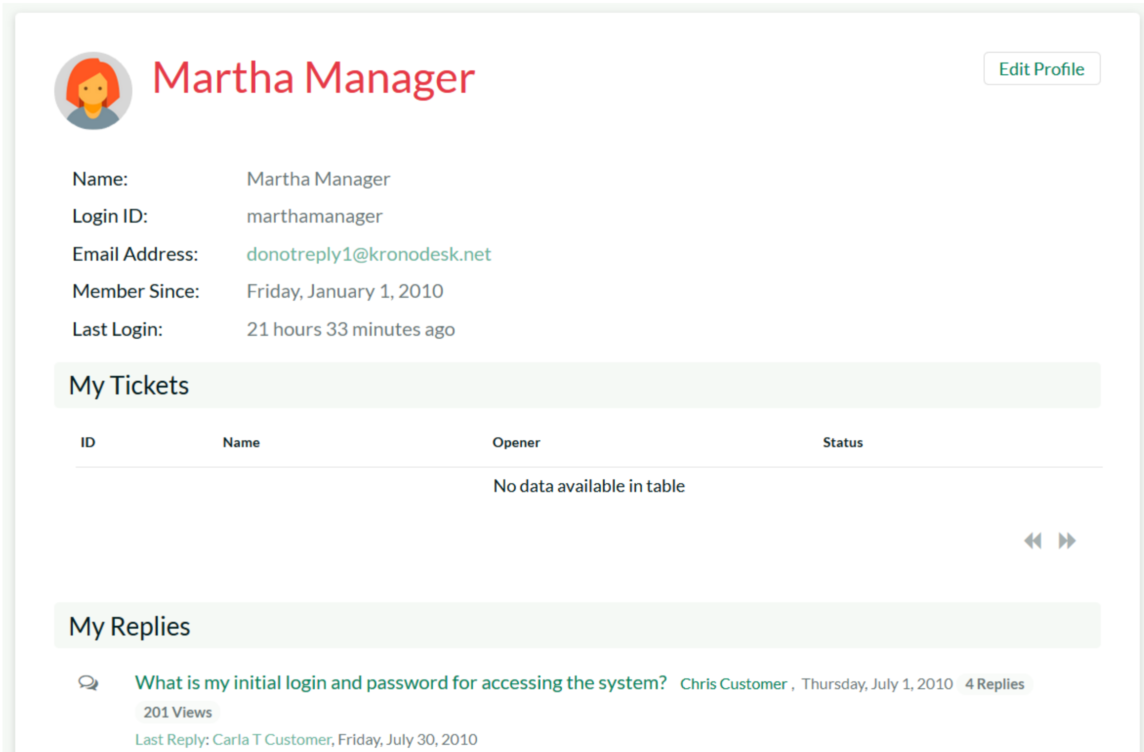
This panel displays the list of changes that have been performed on the help desk ticket artifact since its creation. An example ticket change history is depicted below:



The change history displays the date that each change was made, together with the fields that were changed, the old and new values and the person who made the change. This allows a complete audit trail to be maintained of all changes in the system.

7. User Profile

To update your user's profile, view your list of tickets, threads/replies, draft KB articles or change your password, simply click on your username in the top-right of the application header. The system will then display the user profile home page:

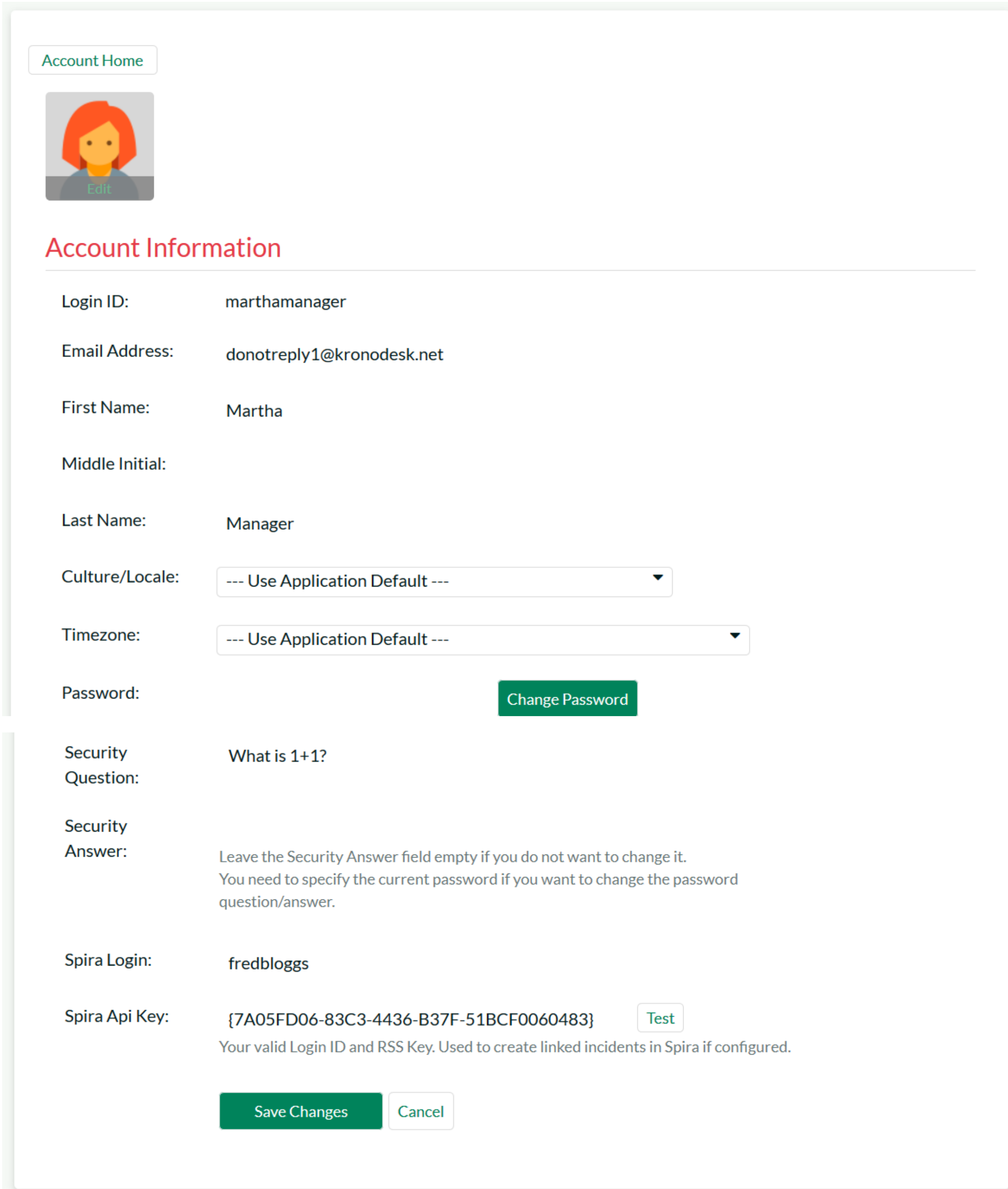


This page will display your user's name, login, email address, date of registration, culture/locale, timezone, linked SpiraTeam login and RSS Token (also known as the API Key), avatar image and a list of the roles that your user belongs to.

Underneath this section the system will display a list of help desk tickets, draft KB articles, forum threads and thread replies that you have posted. To edit your profile, click on the 'Edit Profile' button.

7.1. Edit Profile

If you click on the "Edit Profile" button, it will bring up the following dialog:



You can update the following fields on this page:

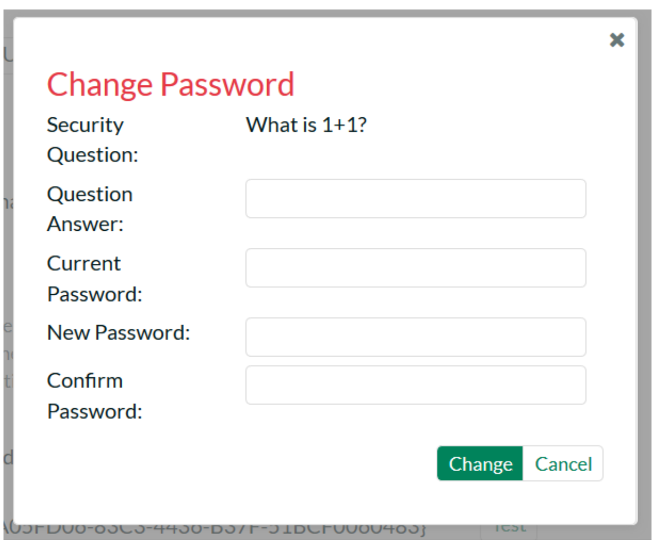
- **Login ID** – the username that you'd like to use in the system. This has to be unique.
- **Email Address** – a valid email address that notifications will be sent to.
- **First Name** – your first name
- **Last Name** – your last name
- **Middle Initial** – your middle initial (if applicable)

- **Culture/Locale** – choose a specific culture/locale for your user. This will determine which language pack is used by the application and what date format is used
- **Timezone** – choose a specific timezone for your user. This will determine the timezone that dates will be displayed in the application
- **RSS Token** – used to allow you view secure KronoDesk RSS newsfeeds from outside the system
- **Password** – enter your current password if you plan on changing the password question/answer. If you don't need to change the password question/answer, you can leave this blank.
- **Security Question/Answer** – enter a question that only you will know the answer to, together with the matching answer to that question.
- **Spira Login** – You need to enter a valid login for SpiraTeam that corresponds to your user. This allows you to view SpiraTeam incidents linked to a specific KronoDesk help desk ticket.
- **Spira Api Key** – You need to enter the SpiraTeam RSS token (also known as the API-Key) for the SpiraTeam user specified above.
- **Avatar** - Each user in KronoDesk can have a small graphic icon (called an avatar) associated with their account. This icon will be displayed next to forum posts, ticket comments, etc. You can click on the [Browse] button to change your avatar or [Remove] to switch your user back to the default image.

Once you are satisfied with the changes, you can click [Update User] to commit the changes.

7.2. Change Password

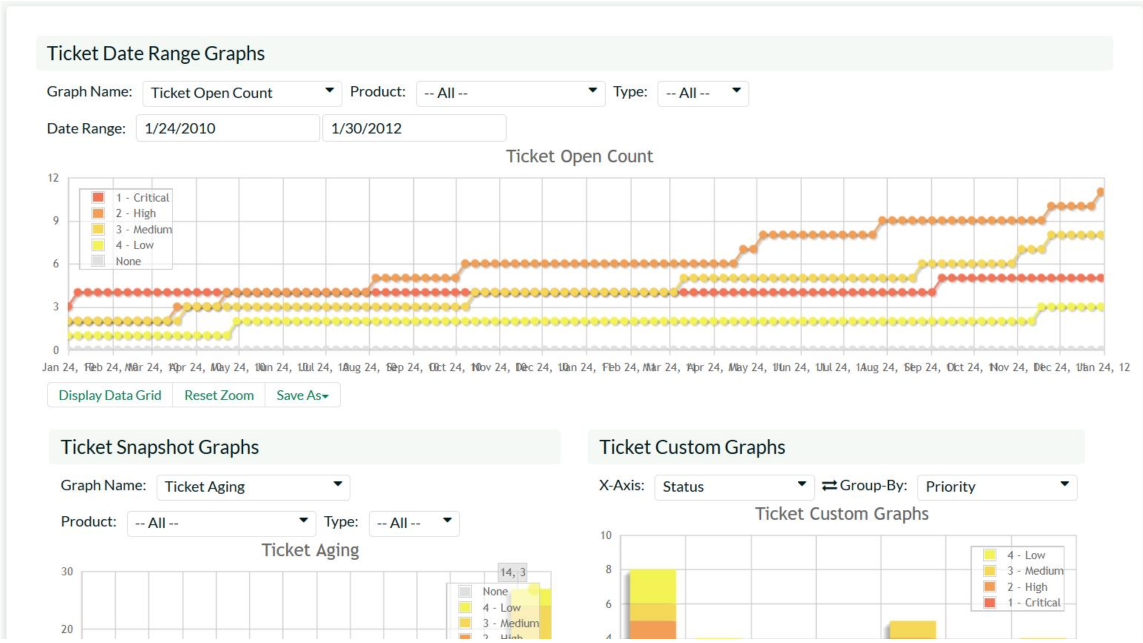
If you click on the "Change Password" button you can update your password



You need to enter the old password and the new password twice. Assuming that the old password matches your current password and that the two instances of the new password match, the system will change your password.

8. Reports

This section describes the reporting features of KronoDesk®, including an overview of each of the report types that are available. When you click on the "Reports" tab on the global navigation bar, you will initially be taken to the reports home page illustrated below:

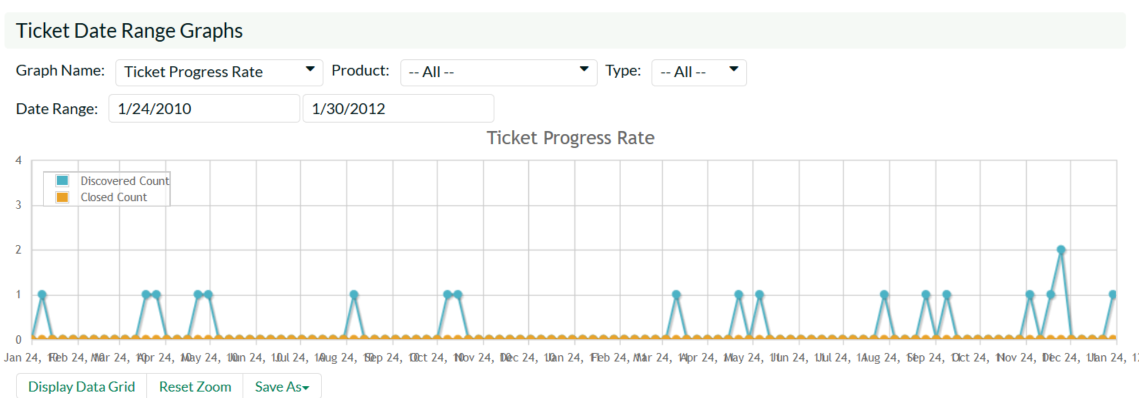


The Reports page is a dashboard that contains the set of graph widgets configured by the current user. By default the dashboard will display: the Ticket Progress Rate, Ticket Aging and Ticket Custom Graphs.

Each of the graphs is described in more detail in the sub-sections below:

8.1. Ticket Progress Rate

The ticket progress rate chart displays the total number of tickets created and closed over a particular date-range, either for all ticket types and/or products or for a specific ticket type and/or product:

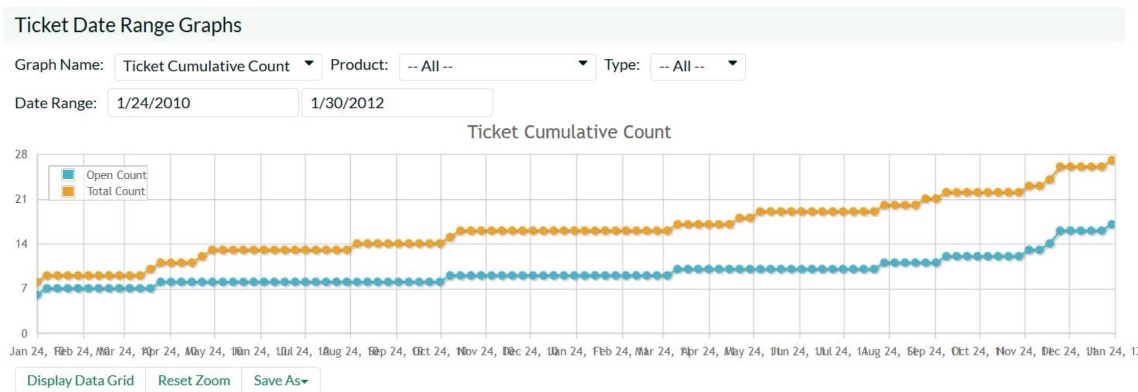


In this version of the report, the y-axis represents the number of tickets (either created or closed in a 24 hour period), and the x-axis represents a specific day in the time-span. Each data-point can be viewed by positioning the mouse pointer over the point, and a "tooltip" will pop-up listing the actual data value. You can filter the report by the type of ticket and/or product, and also change the date range (e.g. displaying only the infrastructure tickets for the date range). If you choose a smaller date-range, the x-axis will switch from weekly to daily and if you choose a larger date-range, the x-axis will switch to monthly.

Clicking on the “Display Data Grid” link will display the underlying data that is being used to generate the graph. In addition, clicking on the Download Data as CSV link will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

8.2. Ticket Cumulative Count

The cumulative ticket count chart displays the cumulative total number of tickets logged in the system over a particular date-range, either for all ticket types and/or products or for a specific ticket type and/or product. The report displays two data series, one illustrating the total count of all ticjets, the other the total count of all *open tickets* (i.e. with status not set to a closed status):

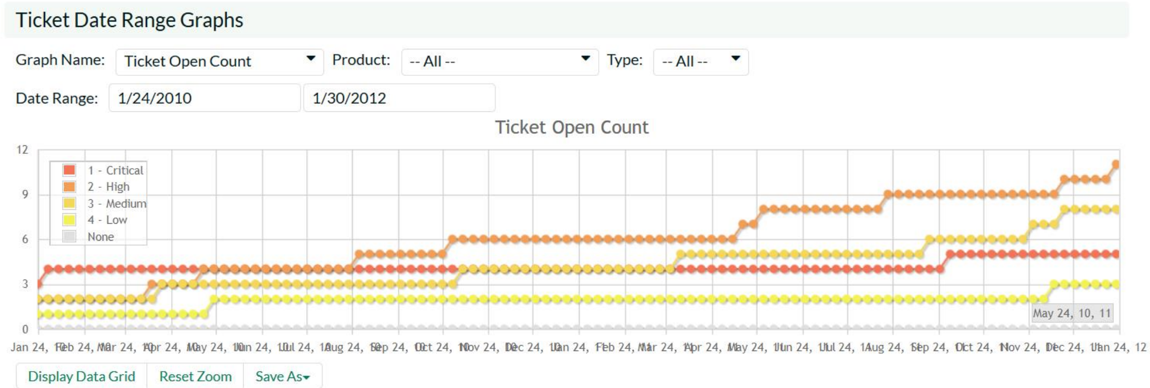


In this version of the report, the y-axis represents the number of tickets, and the x-axis represents a specific week in the time-span. Each data-point can be viewed by positioning the mouse pointer over the point, and a “tooltip” will pop-up listing the actual data value. You can also filter the type of ticket being reported, the product as well as change the date interval. If you choose a smaller date-range, the x-axis will switch from weekly to daily and if you choose a larger date-range, the x-axis will switch to monthly.

Clicking on the “Display Data Grid” link will display the underlying data that is being used to generate the graph. In addition, clicking on the Download Data as CSV link will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

8.3. Ticket Open Count

The open ticket count chart displays the net number of open tickets in the system over a particular date-range categorized by ticket priority, either for all ticket types and/or products or for a specific ticket type and/or product:

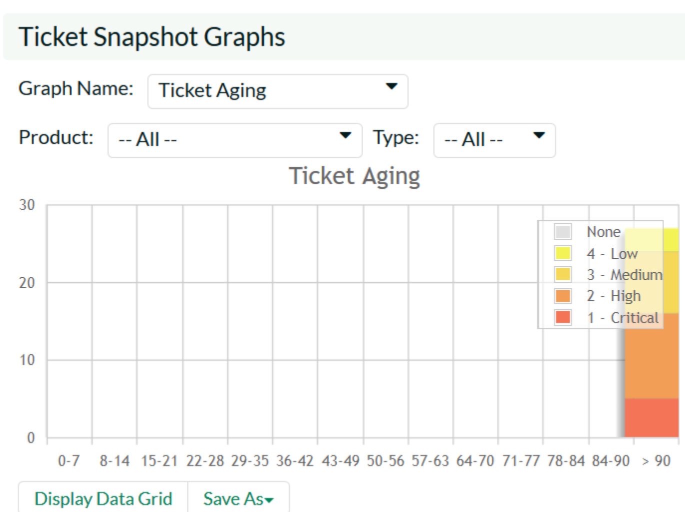


In this version of the report, the y-axis represents the number of tickets, and the x-axis represents a specific week in the time-span. The exact count of each bar in the stacked histogram can be viewed by positioning the mouse pointer over the bar, and a “tooltip” will pop-up listing the actual data value. You can also filter the type of ticket being reported, the product the ticket was reported against, as well as change the date interval. If you choose a smaller date-range, the x-axis will switch from weekly to daily and if you choose a larger date-range, the x-axis will switch to monthly.

Clicking on the “Display Data Grid” link will display the underlying data that is being used to generate the graph. In addition, clicking on the Download Data as CSV link will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

8.4. Ticket Aging

The ticket aging chart displays the number of days tickets have been left open in the system. The chart is organized as a stacked histogram, with the count of tickets on the y-axis and different age intervals on the x-axis. Each bar-chart color represents a different ticket priority, giving an IT service manager a snapshot view of the age of open tickets by priority.



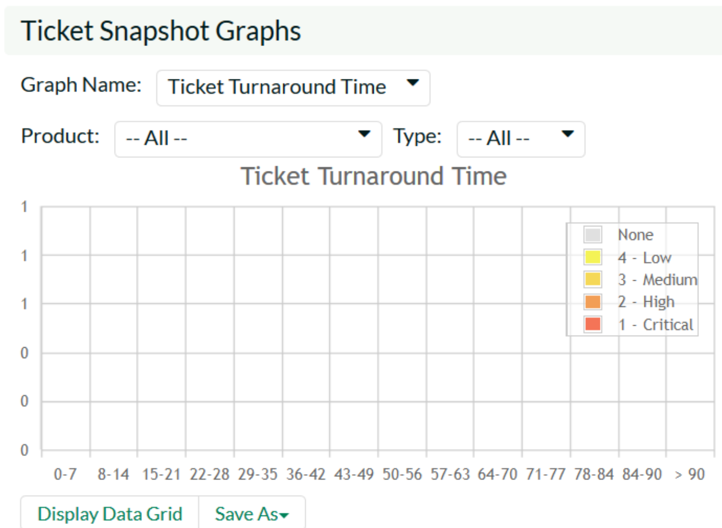
This report can be filtered by the type of ticket and/or product, so for example you can see the aging of just support tickets, or just tickets for a specific product.

Clicking on the “Display Data Grid” link will display the underlying data that is being used to generate the graph. In addition, clicking on the Download Data as CSV link will export the datagrid into Comma

Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

8.5. Ticket Turnaround Time

The incident turnaround time chart displays the number of days incidents have taken to be closed (from the time they were first raised) in the system. The chart is organized as a stacked histogram, with the count of incidents on the y-axis and different turnaround time intervals on the x-axis. Each bar-chart color represents a different incident priority, giving a project manager a snapshot view of the turnaround time of project incidents by priority.

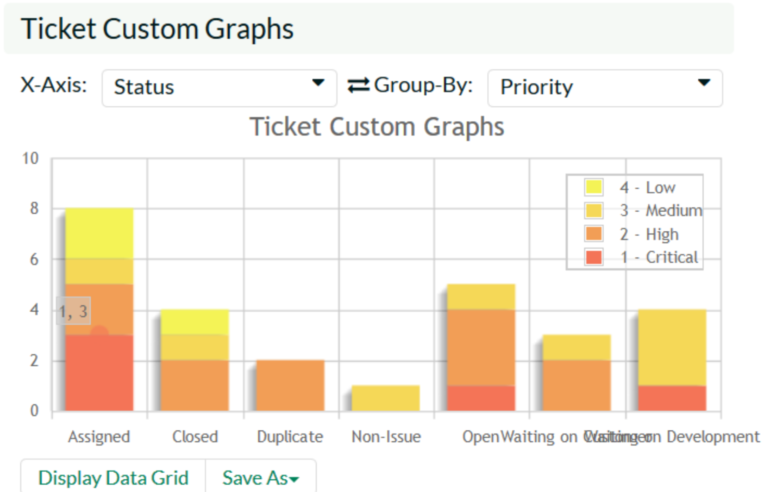


This report can be filtered by the type of ticket and the product, so for example you can see the turnaround time of just infrastructure tickets, or just tickets for a specific product.

Clicking on the “Display Data Grid” link will display the underlying data that is being used to generate the graph. In addition, clicking on the Download Data as CSV link will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

8.6. Ticket Custom Graphs

The ticket custom graph widget shows how many tickets are currently in the system. The number of tickets is displayed according to the criteria that you specify. You can specify the type of data displayed along the x-axis, and the ticket information that is used to group the data. When you first open the graph you will be asked to pick the field that you would like to display on the x-axis and the field that you would like to group the data by. Once you have chosen the appropriate fields the graph will be displayed:



In the illustration above, the x-axis represents the ticket status, and the individual bars are grouped by the priority of the ticket. Each data-value can be viewed by positioning the mouse pointer over the bar, and a “tooltip” will pop-up listing the actual data value. Clicking on the “Display Data Grid” link will display the underlying data that is being used to generate the graph. In addition, clicking on the Download Data as CSV link will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

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