

Aerie Help Desk App User Guide

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Introduction

The introduction section explains the general objective of the Help Desk App.

Scope & Purpose

Track your organization's IT support tickets and technology assets with the Office 365 Help Desk App. Using this app will increase insight into work performed by your IT team and will track open support tickets as well as IT inventory. Creating tickets can be done from any of the sites in your Office 365 site collections, making it easy for end users to submit tickets online from whatever location you desire.

Process Overview

IT administrators can visualize existing tickets by team, priority, or age to quickly understand current and overdue support tickets. Using a personalized dashboard, IT Team members see just those tickets assigned to themselves with easy to digest charts and graphs. This app includes a responsive design and is mobile friendly for use on any device.

Features of the Help Desk App include:

- > Track Help Desk Tickets by Assignment, Creator, or Priority
- > Rich visualizations showing tickets by age and priority
- > Personalized interface so IT personnel see their own tickets
- > Integrated Inventory Tracking
- > Responsive Design for mobile friendly use



Getting Started

If the Aerie Help Desk App has already been downloaded from [here](#) this section will provide a general walkthrough of the app features, and how to get started.

Accessing the Dashboard

After downloading the Help Desk App, the first step is to create a SharePoint Security Group called "Help Desk Admins". If you are not sure how to do so, see [this](#) Office Support Document.

Email Workflow

When a new ticket is submitted through the Help Desk App, an email is sent to the person who submitted the request, along with the person who the ticket was assigned to. As the status of the ticket is changed, the person who submitted the ticket will receive email updates.

Navigation

On the left side of the app you will see the following four menu items-

My Dashboard: This page is used to display only tickets assigned to a particular user.

System Dashboard: The System Dashboard displays all tickets, regardless of the user they are assigned to.

Ticket List: The Ticket List, like the System Dashboard, shows all tickets, but instead displays them in a SharePoint list. This makes it simple to sort and create additional views.

Help Desk Configuration: This SharePoint list is used to customize the logo and site title of your Help Desk App



My Dashboard

The dashboard is comprised of multiple different features. This section describes each of those in detail.

New Ticket Button

In the upper right-hand corner is the button to submit a new ticket. Upon clicking on the button you will be prompted to fill out a ticket request form. The form requires information such as: Issue Title, Description, Request Type, Priority, and the name of the individual you are assigning the ticket to. There is also an option to include an attachment to the ticket.



NEW TICKET

Ticket Analysis Boxes

The “My Dashboard” Menu is customized to the specific user accessing the page. The top two boxes are used to easily analyze that user’s current tickets. The left element quoting “New Tickets assigned to You”, refers to tickets that have been submitted and assigned to you. The second portion, stating “Open Tickets assigned to You”, refers to the tickets that were assigned to you and have been approved for work by either yourself or your supervisor.



1
New Tickets assigned to You



1
Open Tickets assigned to You

My Ticket Lists

The Dashboard displays two lists under the ticket analysis boxes.

The first list displays all tickets the current user has in the system.



The second list displays all tickets the user has previously closed.

Tickets in System			
Show 10 entries			
ID	TITLE	DESCRIPTION	PRIORITY
1 08-19-2015	Test	test	High
2 08-19-2015	New Ticket	ticket	Low

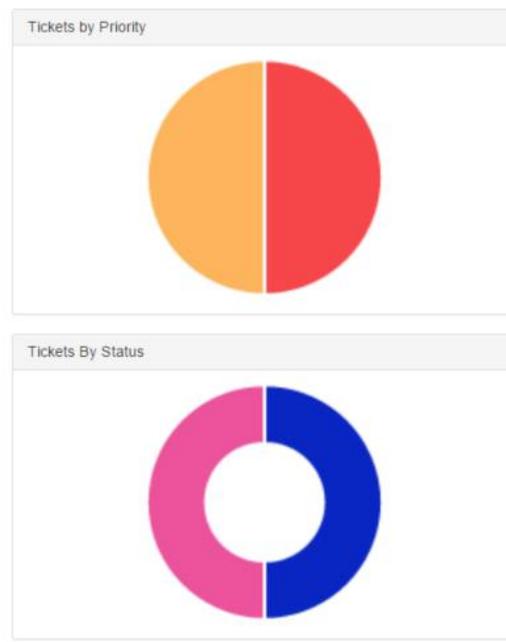
Previous 1 Next
View All Tickets

My Closed Tickets			
Show 10 entries			
ID	TITLE	DESCRIPTION	PRIORITY
No data available in table			

Previous Next
View All Tickets

Ticket Analysis Charts

The far right-hand side of my dashboard displays two pie charts analyzing the tickets in your lists. The top chart analyzes your tickets based on priority, and the bottom chart analyzes your tickets based on the status. If you do not have any tickets, these graphs will not be shown.



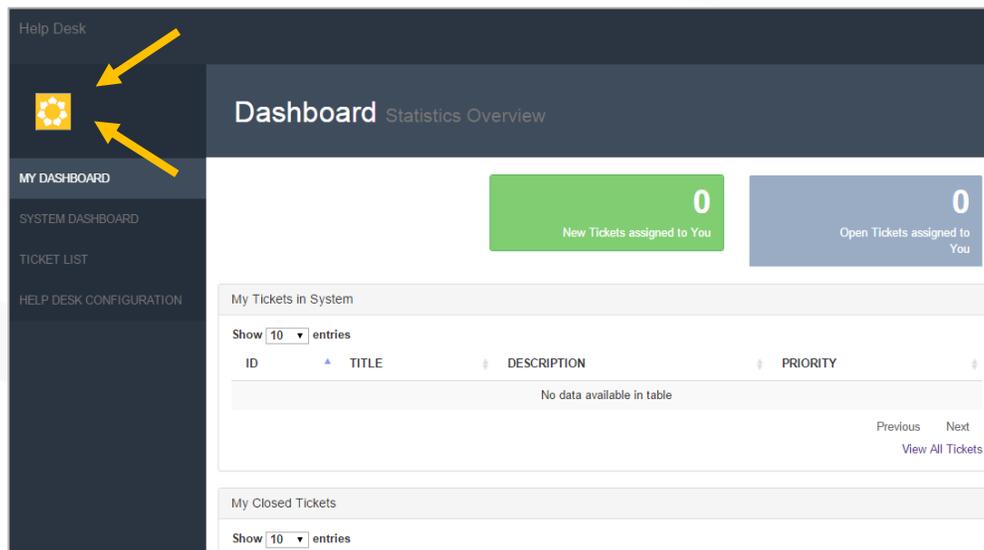
Personalizing Help Desk

This section elaborates on the multiple personalization options within the Aerie Help Desk app.

Adding Your Logo & Renaming Site

To add your own logo, start by opening the Help Desk Configuration list, found in the left-hand menu. Click upload and choose the image you would like to use for your Help Desk Logo.

Whichever image you choose will be placed here:



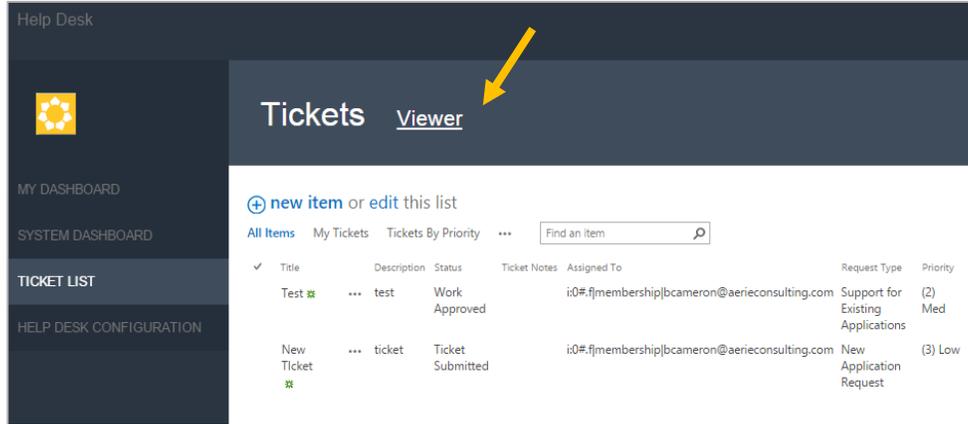
Once the image has loaded, click OK. You will then be prompted to include a Site Title, which will rename the Help Desk tab.

Modifying Request Type

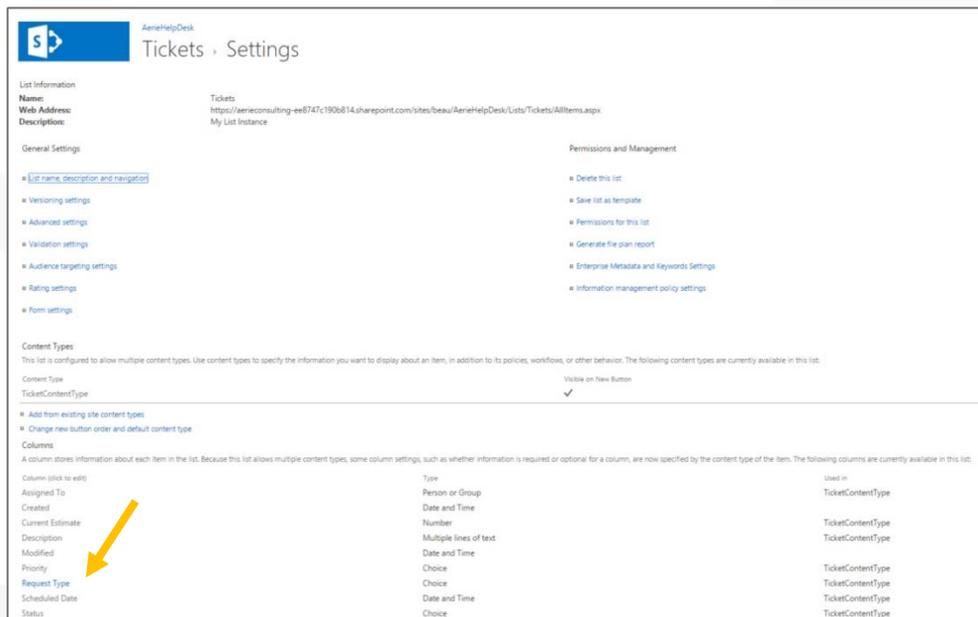
When filling out the New Ticket form, you are required to choose a request type from a drop-down list, but the defaults included may not be ideal for your organization. To add a new request type, start by opening the Ticket List from the side navigation.



Click the "Viewer" link to navigate to the list settings.



Find and select the column you would like to change, in this case "Request Type".



Add any additional choices to the list, each in a separate line, and click OK. If you navigate back to the New Ticket form, your new choices should now be available.

Additional Support

For more support regarding the Help Desk App [visit our website](#) or contact Aerie Consulting.

Request an Assessment

[Schedule an assessment](#) with one of our technicians for a full walk-through of how to optimize the Help Desk App.

Contact Us

Feel free to call us at 802.448.1185 with any questions, concerns or suggestions you may have about the app.

Review the App

Your feedback is very important to us, and is helpful in developing useful updates to the Help Desk App. [Please take a minute to review the app on the Microsoft Office Store.](#)

