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**Introduction**

We would like to thank you for opting Help Desk Pro built by Byblig. Byblig is an IT company, we offer end to end IT services, the service also includes custom SharePoint development solutions.

Help Desk Pro is an office 365 and SharePoint add-in, it is user friendly and easy to install. Setup and use tool which will help you to overcome the problem of managing the request, incident, issue tickets within the organisation. Help Desk Pro is compatible with Office 365 and SharePoint online and on-premises. Via the tool you can easily assign\raise tickets(Request, Incident, Issue, etc.. ) against the department\expert and can track the ticket till closure.

Some of the key features that Help Desk Pro offers are as below:

- Ability to create unlimited tickets.
- Ability to assign ticket(s) to a specific expert of a department.
- Rolebase access to the features.
- Ability to generate report.
- Ability to attach files.
- Track the tickets till closure.

**Latest version and news**

**Version:** 1.0.0.0  
**Publish Date:** 02/10/2019

We will love to keep you updated via our newsletters about the upgrades\latest versions, as we are committed to provide the best experience to our users through our add-in as a result we keep on adding new features very often.
How to access the add-in

1) Login to your office 365 environment.
2) Navigate to the site or subsite in which the Help Desk Pro is installed.
3) Go to “Site content”.
4) At the site content page the link of the installed “Help Desk Pro” will be present (here we are assuming that you have already installed Help Desk Pro add-in at your SharePoint environment).
5) Click on “Help Desk Pro” link.

Note: The user who will install the add-in from the office 365 app store will by default becomes the “Administrator” of the add-in.
User Roles in Help Desk Pro
The Help Desk Pro comes by default with three types of user roles each role have a set of authorities assigned, hence “Administrator, Expert and User” have role based menu access, below are the User Roles:

1. Administrator
2. Expert
3. User
4. Admin+Expert (You can assign Admin and Expert both the roles to a single person or the user of the add-in).

**Menu Access**

Every user in the add-in have role based access to the features, where “**Administrator**” have full control, “**Expert**” can see only those tickets which are assigned to him/her or raised by him/her and can also create new tickets, “**User**” can only see the tickets which are raised by him and can create new tickets.

**Administrator**

Below are the list of menu/left navigation which will be available for administrator:

1) Global Dashboard
2) User Roles
3) Users
4) Categories
5) Status
6) Priorities
7) Ticket Type

**My Tickets**

1) Dashboard
2) New Ticket
3) Raised by Me

**Help**

1) **Global Dashboard**

   Global Dashboard page can be accessed by administrator only, from where the admin can view all the ongoing and closed tickets in the organisation, admin also have the authority to change the status and can also delete the tickets.
2) User Roles

User Role page can be accessed by administrator only, this page contains the types of user roles the add-in have, these roles are only readable no one can add update or delete the user roles from the add-in.
3) **Users**
User page can be accessed by administrator only, from this page admin can assign role to the office 365 user in the add-in.

4) **Categories**
Categories page can be accessed by administrator, from this page admin can create different category\ department which the organisation have, Example(Human Resource, Network, etc... ).
5) **Status**

Status page can be accessed by administrator only, in this page admin can create the types of status, example(Open, In-progress, Resolved, Closed, Re-open, etc.).
6) **Priorities**

Priorities page can be accessed by administrator only, in this page admin can create the types of priorities, example (High, Medium, Low).

![Priorities Page](image1)

7) **Ticket Types**

Ticket Type page can be accessed by administrator only, in this page admin can create the ticket type like (Request, Issue, Incident, etc.)

![Ticket Types Page](image2)
8) **Dashboard**
Under this page administrator will be able to view all the tickets which are raised by him/her, and are on-going or closed.

9) **New Ticket**
From this page administrator will also be able to create a new ticket.
10) **Raised by Me**

Under this page administrator will only be able to see those tickets which are raised by him/her and do not have the status “Closed”.

![Raised by Me Dashboard](image1.png)
11) **Help**

This page contains an overview of the add-in workflow, link to User Manual, link to client support and add-in version.

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**Expert**

Below are the list of menu/left navigation which will be available for expert user:

**My Tickets**
1) Dashboard
2) New Ticket
3) Raised by Me
4) Assigned to Me

**Help**

1) **Dashboard**

Under this page expert will be able to view all the tickets which are raised by him/her and Assigned to him/her.
2) **New Ticket**
From this page expert will also be able to create a new ticket.

3) **Raised by Me**
Under this page expert will only be able to see those tickets which are raised by him/her and do not have the status “Closed”.
4) **Assigned to Me**
Under this page expert can see all the on-going tickets which are assigned to him/her, which do not have the status as “Closed”.
5) **Help**
This page contains an overview of the add-in workflow, link to User Manual, link to client support and add-in version.

**User**
Below are the list of menu/left navigation which will be available for normal users:

**My Tickets**
1) Dashboard
2) New Ticket
3) Raised by Me

**Help**

1) **Dashboard**
Under this page user will be able to view all the tickets which are raised by him/her.
2) **New Ticket**
From this page user will also be able to create a new ticket.
3) **Raised by Me**
Under this page user will only be able to see those tickets which are raised by him/her and do not have the status “Closed”.

4) **Help**
This page contains an overview of the Help Desk Pro workflow, link to User Manual, link to client support and add-in version.
**Admin + Expert**

Below are the list of menu/left navigation which will be available for user who is Admin + Expert:

1) Global Dashboard  
2) User Roles  
3) Users  
4) Categories  
5) Status  
6) Priorities  
7) Ticket Type

**My Tickets**

1) Dashboard  
2) New Ticket  
3) Raised by Me  
4) Assigned to Me

**Help**

This user has an extra page added to the left navigation as compare to the Administrator i.e “Assigned to Me” as this user is a combination of Administrator and Expert, this means other users can also assign tickets to this user. And in the “Dashboard” page under “My Tickets”, this user can see all the tickets which are raised by him/her or assigned to him/her.
How to use Help Desk Pro

As soon as the user installs Help Desk Pro, the user who has installed the add-in becomes the administrator of the add-in, after logging into the add-in successfully below is the admin landing page i.e “Global Dashboard” where he/she will land:

Create Categories

Only admin can add, update, delete category. To add a category please follow the below steps:

- Click on “Categories” link present in the left navigation.
- Click on “+Add”.
- Enter the name of the Category or department.
- Click on “Submit” button.
The category will get created and will appear in the categories grid.
Assign Role

Once the category is selected now lets assign the roles, only admin can assign role, as the user who installs the add-in by default becomes the administrator of the add-in, admin can assign Expert, Administrator or a User role to an office 365 user.

Create Administrator or User

To create administrator or user please follow the below steps:

- Click on “Users” link present in the left navigation.
- Click on “+Add”.
- Click on the “User” dropdown list.
- Select a user, the user email id will auto appear in the “Email ID” field.
- Select a User Role(Administrator or User) from the user role dropdown.
- Click on “Submit”

The same role will get assigned to the above selected user and the details will appear with the assigned user role will start appearing in the “User Detail” grid.
Create Expert

To create an expert please follow the below steps:

- Click on “Users” link present in the left navigation.
- Click on “+Add”.
- Click on the “User” dropdown list.
- Select a user, the user email id will auto appear in the “Email ID” field.
- Select a “User Role” as “Expert” from the user role dropdown.
- Select the category from the “Category dropdown”
- Click on “Submit”.

After clicking on submit, the expert role will get assigned to the selected user and will start appearing in the “User Detail” grid.
Create Status

After assigning the roles to the users now lets create the “Status”, only administrator of the add-in can create status, to create status please follow the below mentioned steps:

- Click on “Status” link present in the left navigation.
Create Priorities

Now let's create the priorities, only administrator of the add-in will be able to create priorities in the add-in, to create the priorities please follow the below mentioned steps:

- Click on "Priorities" link present in the left navigation.
- Click on “+Add”.
- Enter the priority name in “Enter Priority” field.
- Enter order in the order field.
- Click on “Submit”.

After clicking on submit the same priority will appear in the detail grid.
Create Ticket Type

Only administrator of the add-in will be able to create ticket type in the add-in, to create the ticket type please follow the below mentioned steps:

- Click on “Ticket Type” link present in the left navigation.
- Click on “+Add”.
- Enter the ticket type name in “Enter Ticket Type” field.
- Click on “Submit”.

After clicking on submit the same ticket type will appear in the detail grid.
How to raise a ticket from User to Expert and track till closure

- Login to the add-in form user credentials.

- Click on “+New Ticket” link present under “My Tickets”.
- Enter the title in “Enter Ticket Title”.
- Enter the description.
- Select the “Category”.

- Select the expert from the “Expert” dropdown list.

- Select the ticket type from “Type” dropdown list.
● Select the priority from the “Priority”

● Click on “Browse” to attach the file.
Click on “Submit”.

A successful message will appear on the screen, then click on “Ok” button which is appearing on the message, once you will click on “Ok” the application will take you to the dashboard page where the created ticket will appear in the first place of the dashboard grid.
- Login form expert credentials into the add-in.
- Click on “Assign to Me” link present under “My Tickets”
- Click on the edit icon of the same ticket.
- Change the status (ex. Resolved or any other).

- Enter a comment.
- Click on “Submit” button.

- Login with User credentials in the add-in.
- Click on “Raised by Me” link present under “My Tickets”.
- Click on the edit icon of the same ticket.

- Check the mentioned comment.
- Change the status to “Closed”.
- Enter the comment.

As soon as you change the status of the ticket to closed and click on submit button, the same ticket will only appear in the dashboard and will get removed from “Raised by me” and “Assigned to Me” grids of User and Expert respectively.
How to raise a ticket from Administrator to Expert and track till closure

- Login to the add-in form Administrator credentials.
- Click on "+New Ticket" link present under “My Tickets”.
- Enter the title in “Enter Ticket Title”.
- Enter the description.
- Select the “Category”.
- Select the expert from the “Expert” dropdown list.
- Select the ticket type from “Type” dropdown list.
- Select the priority from the “Priority”
- Click on “Browse” to attach the file.
- Click on “Submit”.

![My Tickets Dashboard](image)
A successful message will appear on the screen, then click on “Ok” button which is appearing on the message, once you will click on “Ok” the application will take you to the global dashboard page where the created ticket will appear in the first place of the global dashboard grid.
- Login form expert credentials into the add-in.
- Click on “Assign to Me” link present under “My Tickets”
- Click on the edit icon of the same ticket.
- Change the status (ex. Resolved or any other).
- Enter a comment.
- Click on “Submit” button.
• Login with Administrator credentials in the add-in.
• Click on “Raised by Me” link present under “My Tickets”.

• Click on the edit icon of the same ticket.
● Check the mentioned comment.

● Change the status to “Closed”.
● Enter the comment.

● Click on “Submit”.
As soon as you change the status of the ticket to closed and click on submit button, the same ticket will only appear in the global dashboard, dashboard and will get removed from “Raised by me” and “Assigned to Me” grids of Administrator and Expert respectively.

How to raise a ticket from Expert to another Expert and track till closure

- Login to the add-in form Expert credentials.
- Click on “+New Ticket” link present under “My Tickets”.
- Enter the title in “Enter Ticket Title”.
- Enter the description.
- Select the “Category”.
- Select the expert from the “Expert” dropdown list.
- Select the ticket type from “Type” dropdown list.
- Select the priority from the “Priority”
- Click on “Browse” to attach the file.
- Click on “Submit”.

A successful message will appear on the screen, then click on “Ok” button which is appearing on the message, once you will click on “Ok” the application will take you to
the dashboard page where the created ticket will appear in the first place of the dashboard grid.

- Login form another expert credentials into the add-in against which the first expert has raised a ticket.
- Click on “Assign to Me” link present under “My Tickets”
- Click on the edit icon of the same ticket.
- Change the status (ex. Resolved or any other).
- Enter a comment.
- Click on “Submit” button.
- Login with first expert credentials in the add-in who raised the ticket.
- Click on “Raised by Me” link present under “My Tickets”.
- Click on the edit icon of the same ticket.
- Check the mentioned comment.
- Change the status to “Closed”.
- Enter the comment.
- Click on “Submit”.

As soon as you change the status of the ticket to closed and click on submit button, the same ticket will only appear in the dashboard and will get removed from “Raised by me” and “Assigned to Me” grids of both the Experts respectively.