

RightCrowd ServiceDesk Internal User Guide

2018



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Introduction

RightCrowd ServiceDesk is an easy-to-use web-based support system. Our customers use ServiceDesk to connect with RightCrowd support technicians and resolve product questions or issues.

You can reach RightCrowd ServiceDesk at <https://servicedesk.rightcrowd.com/helpdesk/> or follow the link(s) from the Intranet.

1 Managing your ServiceDesk account

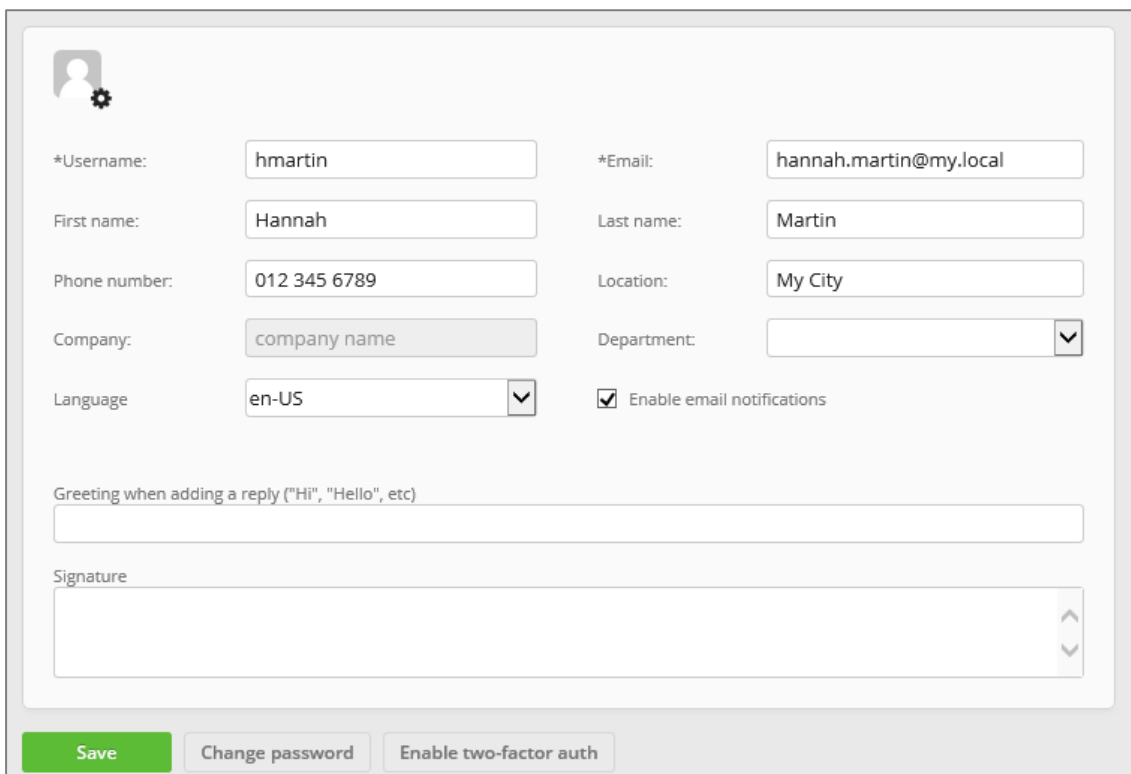
1.1 Update your user details

1. In the upper right of the RightCrowd ServiceDesk screen, click your username to view your account details:



2. In the **User details** screen, click **Edit**.
3. Make any desired changes to your account details and preferences.

Note: The **Company** field can only be updated by the RightCrowd ServiceDesk administrator.

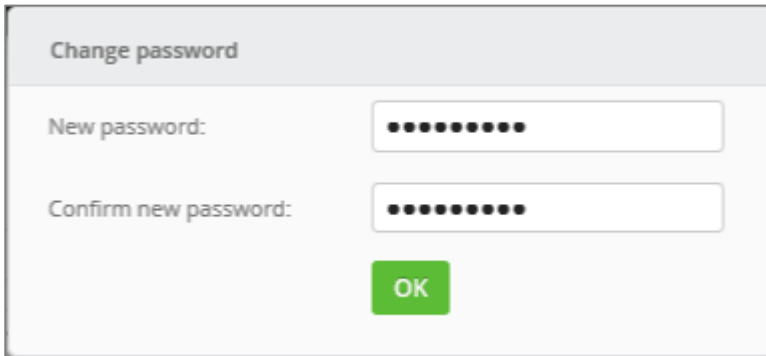
A screenshot of the 'User details' form. It features a profile icon with a gear icon. The form has two columns of input fields: *Username (hmartin), *Email (hannah.martin@my.local), First name (Hannah), Last name (Martin), Phone number (012 345 6789), Location (My City), Company (company name), Department (dropdown), Language (en-US dropdown), and a checkbox for 'Enable email notifications'. Below these are text areas for 'Greeting when adding a reply' and 'Signature'. At the bottom are three buttons: 'Save' (green), 'Change password', and 'Enable two-factor auth'.

4. Click **Save**.

1.2 Change your password

1. In the **User details** screen, click **Edit**.
2. Click **Change password**.

3. In the **Change password** dialog box, enter a new password.

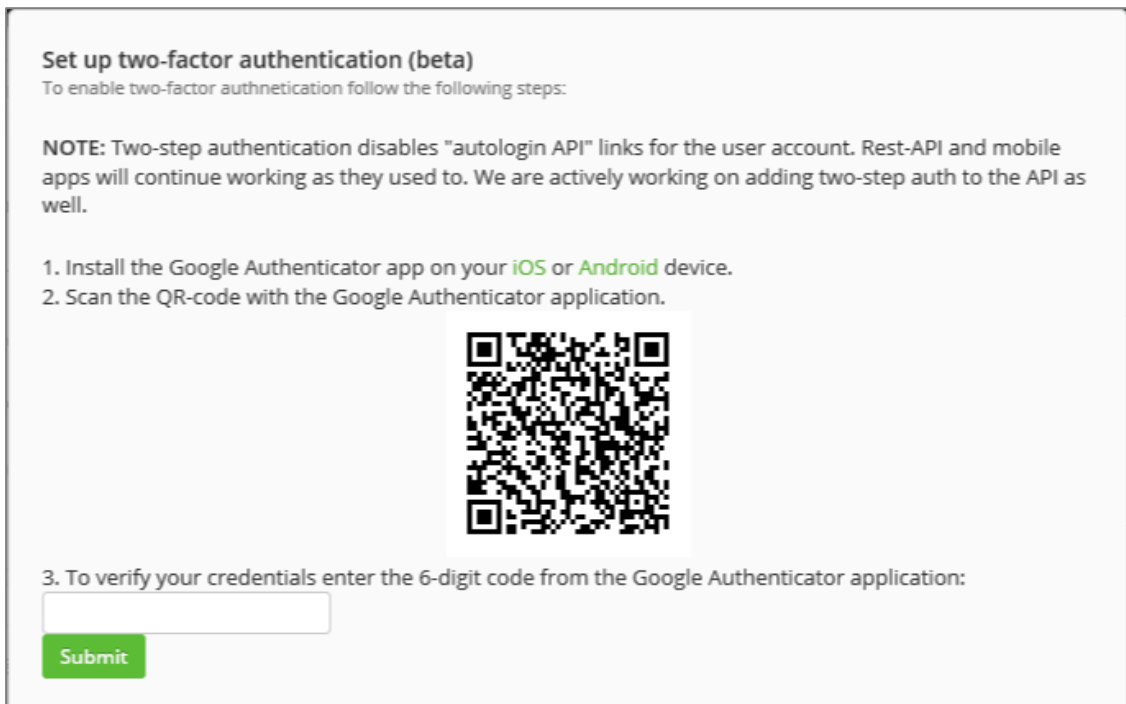


4. Click **OK**.

1.3 Enable two-factor authentication

If you have the Google Authenticator app on your iOS or Android device, you can enable two-factor authentication for your RightCrowd ServiceDesk user account.

1. In the **User details** screen, click **Edit**.
2. Click **Enable two-factor auth**.
3. On the **Set up two-factor authentication** screen, scan the QR code using the Google Authenticator app on your device.



4. Enter the code received from your Google Authenticator app, and click **Submit**.

With two-factor authentication enabled, each time you sign-into your RightCrowd ServiceDesk account, you will also need to enter a code received from Google Authenticator.

2 Using tickets

After logging in to RightCrowd ServiceDesk, your landing page is the **Tickets** tab (Figure 1). Support queries are tracked in RightCrowd ServiceDesk via tickets. Each ticket has a unique number, and contains all emails, screenshots, and files relevant to the ticket.

ServiceDesk uses a grid-view to display the active tickets that you have permission to see.

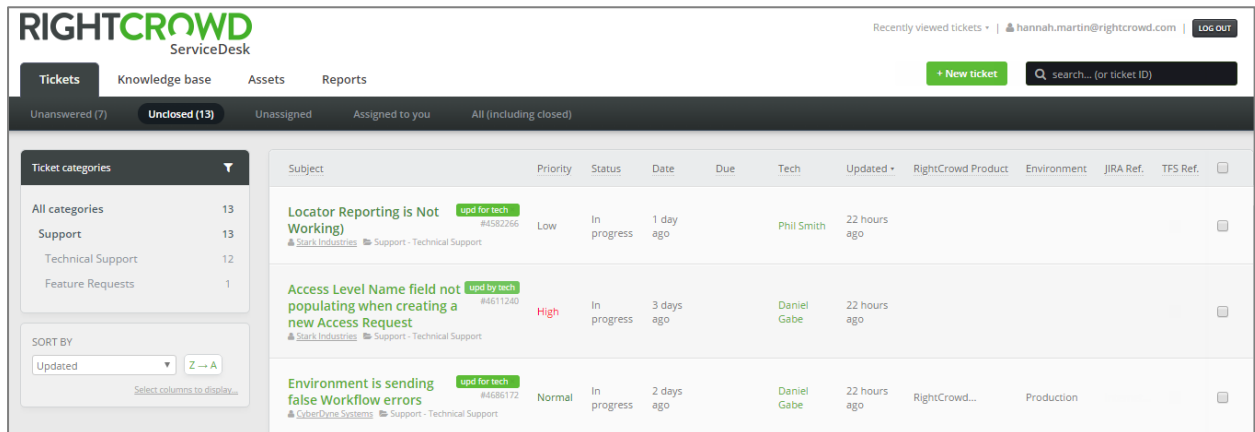


Figure 1

2.1 Filter tickets

You can refine the tickets displayed by using the sub-tabs in the toolbar at the top of the screen. The available sub-tabs are:

- **Unanswered:** Active tickets that require a response – either new tickets or tickets with an updated response.
- **Unclosed:** Active tickets that you have permission to view.
- **Unassigned:** Active tickets that have not been assigned to a technician.
- **Assigned to you:** Tickets that have been assigned to you.
- **All (including closed):** All tickets you have permission to view, including closed ones.

You can also filter by categories.

1. In the **Ticket** categories navigation box on the left, RightCrowd ServiceDesk displays available categories and sub-categories, and the number of tickets in each (Figure 2).

2. Click a category or sub-category name to display only tickets in that category.

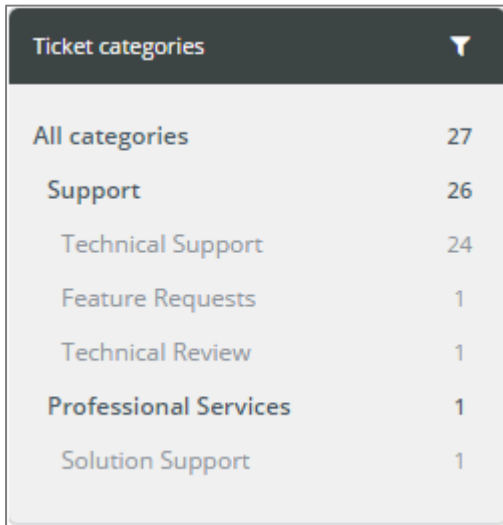


Figure 2

Lastly, you can click on a column heading in grid view to toggle the sort direction between ascending and descending.

2.2 Customize your grid

To customize the columns in your grid-view:

1. In the **Sort by** navigation box on the left, click **Select columns to display...** (Figure 3).
2. Choose which columns you wish to display in your grid by selecting and/or deselecting the relevant check boxes.
3. Click **Select columns to display...** again to collapse the panel.

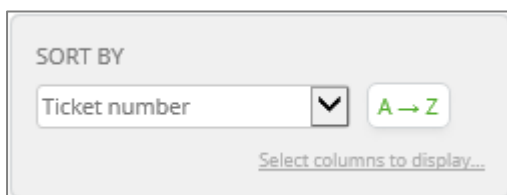


Figure 3

2.3 Add a ticket

To add a new ticket:

1. Click the **+ New ticket** button in the top right of the window.
2. If you wish to create a ticket on behalf of a customer, select the check box **Submit on behalf of another user**.
3. Enter the details of the ticket (Figure 4):
 - **Subject:** Enter a subject for the ticket.

- **Ticket details:** Enter a description for the reason you are creating the ticket. For example, if you need help with a RightCrowd product, describe the issue and include the RightCrowd product version and steps to reproduce the problem.
 - **Category:** By default, a new ticket has a category of Technical Support. From the drop-down box, you can select a different category for the ticket if required. Information fields may change depending on the category of the ticket.
 - **Priority:** From the drop-down box, select a priority level for the ticket – for example, **Normal** or **High**.
 - **Attach a file:** Click this link to attach a file to the ticket – for example, a screenshot, Microsoft Word document or PDF.
 - **Ticket of Note Description:** Please leave this field blank unless you are responsible for generating support reports.
 - **JIRA Ref:** If a related JIRA ticket exists, enter its reference number here. This reference will also be visible to the customer as well as technicians.
 - **TFS Ref:** If a related TFS item exists, enter its reference number here. This reference will be visible to technicians only.
4. Click **Advanced** to display more options where you can:
- Add a due date to the ticket.
 - Assign the ticket to a technician.
 - Add tags.
 - Set the ticket to repeat and select the recurrence frequency and start date.

5. Click **Submit**.

New ticket

Submit on behalf of another user

Subject
Subject

B I U

Ticket details

Technical Support [attach a file...](#)

* I have reported the issue to my internal support team. * I have provided the internal issue register reference number below.

* I have detailed the steps required to reproduce the issue. * I have detailed what was expected versus what actually happened.

* This issue is isolated to RightCrowd Software. * I have eliminated external systems from being the source of the problem.

* I have gathered details of the incident with supporting evidence. * I have provided the exact time of incident and related log files etc.

* I have removed all personally identifiable information from this ticket * RightCrowd Product

* Environment * Browser Ticket of Note

Ticket of Note Description
Ticket of Note Description

JIRA Ref. TFS Ref.

Figure 4

2.4 Manage a ticket

A RightCrowd ServiceDesk ticket may resemble the example below:

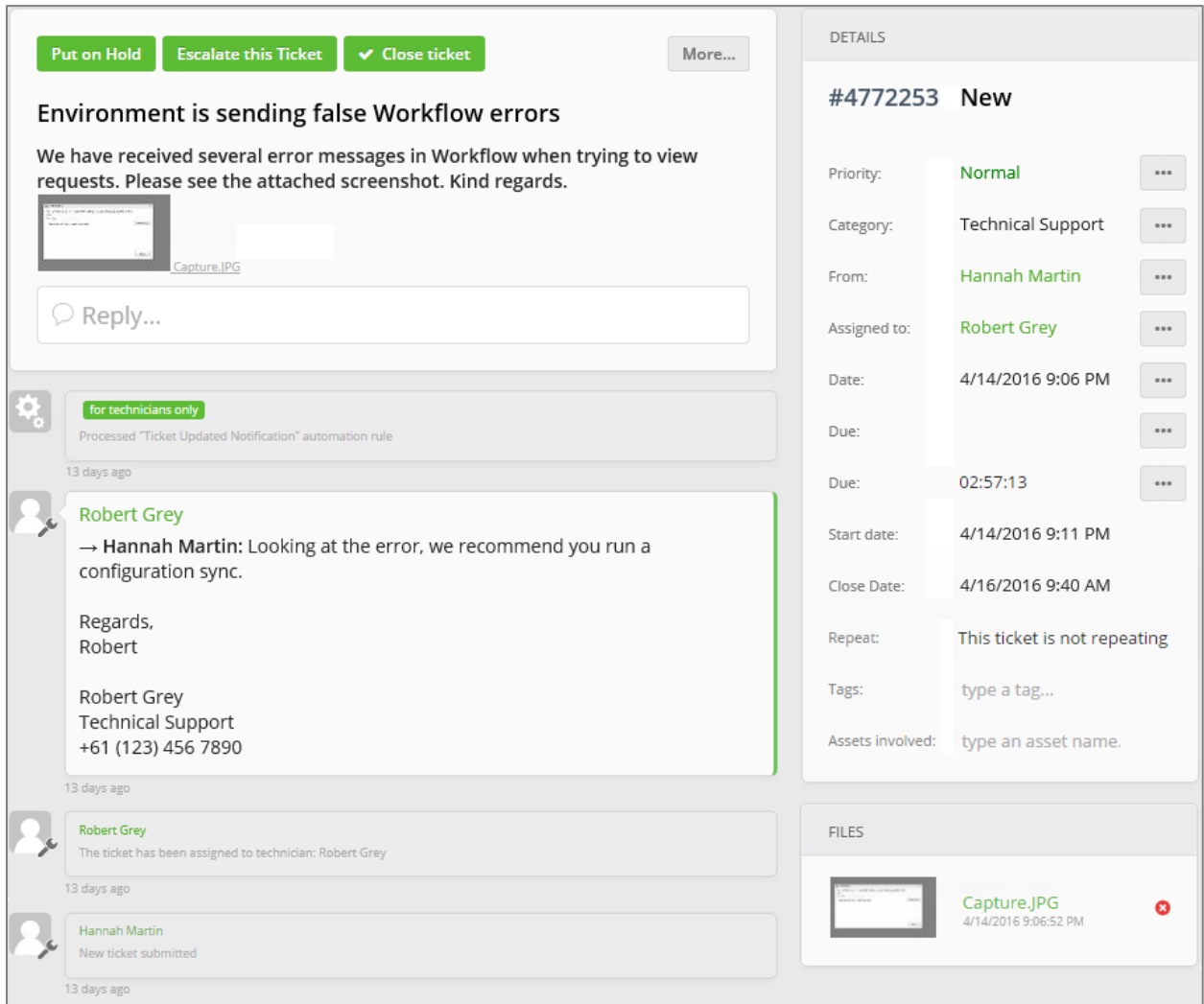


Figure 5

A ticket has (Figure 5):

- Buttons at the top to manage its status – for example, you can escalate, close or re-open the ticket. Click the **More...** button to view an advanced menu with a variety of additional options – for example, you can edit, delete, print or clone a ticket. The options available from the advanced menu depend on your account type.
- A **Details** pane on the right listing the properties of the ticket, including the priority, category and start and close dates. Click the **...** button next to a property to modify it.
- A message log containing the conversation between the customer and the RightCrowd ServiceDesk support team, plus any system event and status changes for the ticket.

2.5 Advanced ticket functions

2.5.1 Internal replies

An internal reply to a ticket is viewable only by RightCrowd personnel. When replying to a ticket, select the **For technicians only** check box to set your reply as internal only (Figure 6):

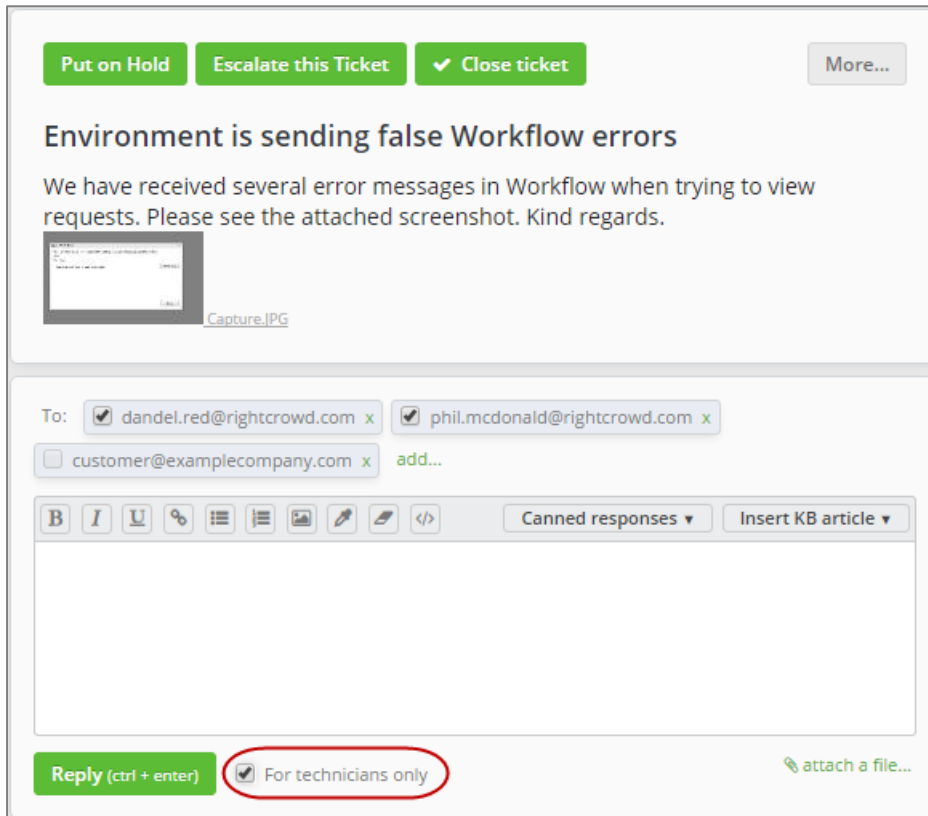


Figure 6

In the message log, internal replies are identified with the **for technicians only** label.

2.5.2 Repeat a ticket

You can flag a ticket to repeat, and configure a desired repeat schedule such as daily, weekly, or monthly. This function can be useful for setting up periodic administration tasks (for example, checking logs on production client systems every two months for a specific client).

You can flag a ticket to repeat by selecting the **Repeat** check box when creating a new ticket (Figure 7):



Figure 7

For an existing ticket, you can configure repeat properties in the **Details** pane (Figure 8):

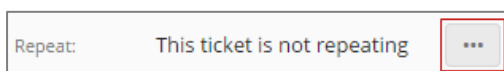


Figure 8

2.5.3 *Escalated and high/critical priority tickets*

If a ticket is escalated (via the **Escalate this Ticket** button at the top of a ticket), or its priority changed to high or critical, immediate SMS notifications are sent to the appropriate support personnel and other subscribed personnel.

Note: RightCrowd ServiceDesk is also available for iOS and Android devices. You can download the free **JitBit Helpdesk** app from the Apple App Store or Google Play Store.