Service Desk
Functions & Settings Guide

Oak can be used to handle communication between your users and managers. If a user has an incident that needs fixing or a service request that needs fulfilling, a resolution can be quickly organised and the whole process tracked. Service desks are an essential IT service management (ITSM) tool and are available for you to use within Oak.

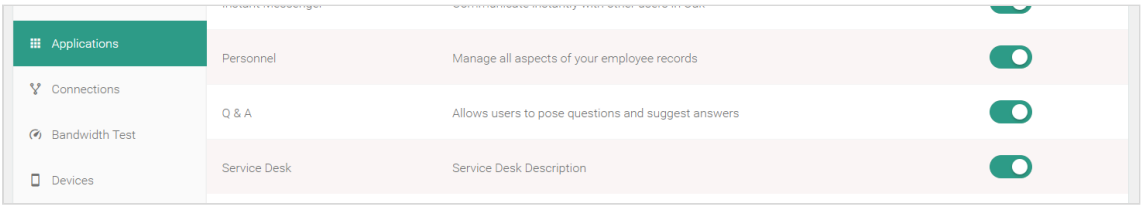
Ideal for any business running a contact centre, Oak's service desk integrates with the rest of the platform. It gives you a single place to record everything, with precise control through the permissions and security functions.

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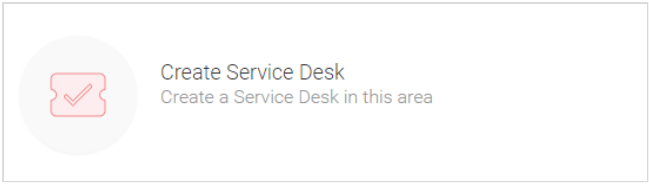
1. Activating Service Desk

Service Desk needs switching on in Site Settings. Go to the **Actions button** > **Configure** > **Site Settings** > **Applications** and switch on the **Service Desk** option.



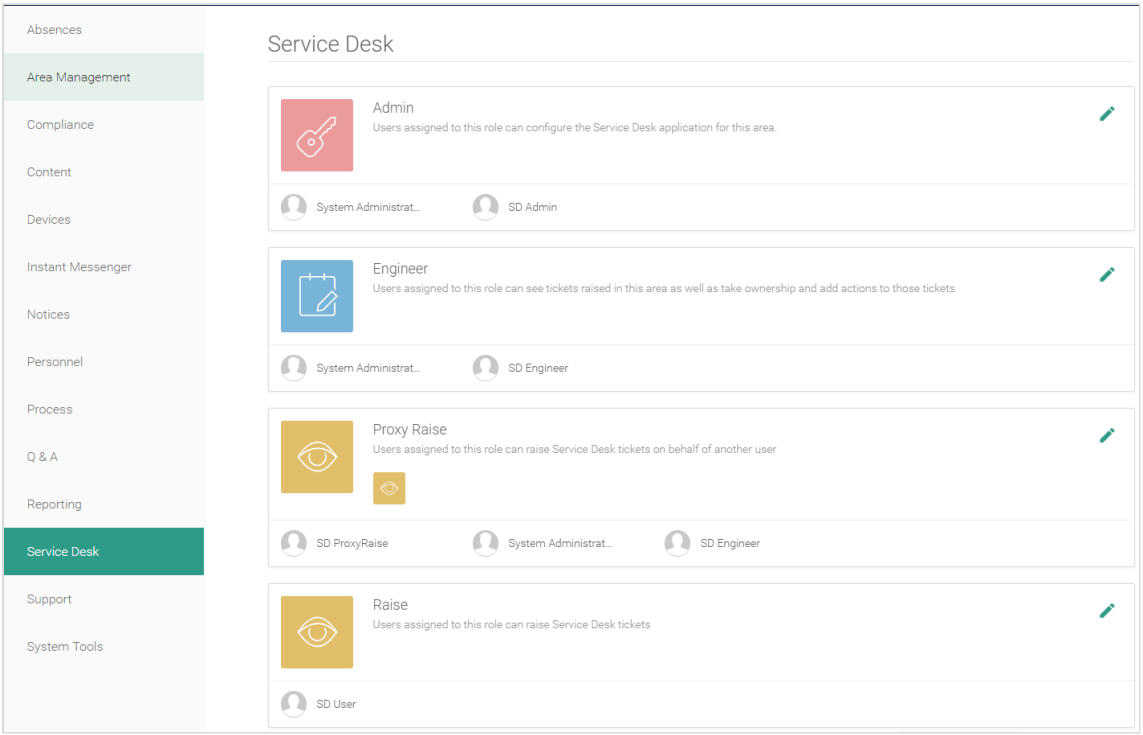
Service Desk won't appear in any area of Oak until the first service desk is created by a user with the right access. A service desk admin can do this by going to the **Actions button** > **Create** > **Create Service Desk**. This builds the service desk and opens its dashboard. Setting up an admin user is covered in the next section.

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2. Setting your access level

There are four roles available to users assigned to a service desk. These are set in the security roles of **Area Management**. As a service desk can be set up and configured for each area of your intranet, make sure you know which area you're setting it up for.



- **Admin**: full access to the service desk functions, including configuring it, assigning tickets to engineers, raising tickets on behalf of other users and managing ticket routing.
- **Engineer**: can see all tickets raised in the area and take ownership of and action tickets.
- **Proxy Raise**: can raise tickets on behalf of another user, by selecting them when creating the ticket.
- **Raise**: can raise tickets for themselves only. They receive notifications on their tickets' progress and can see the Dashboard and Tickets tabs.

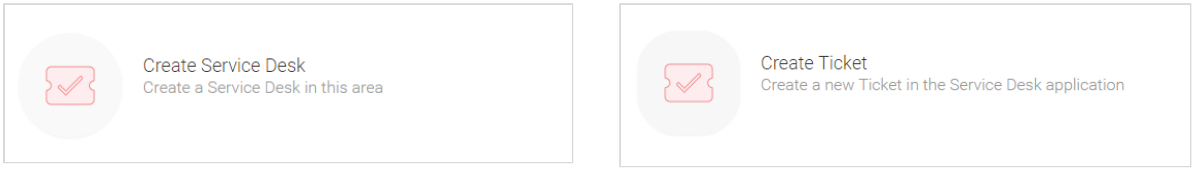
> Only an admin can create a new service desk. A user needs the Admin security role for the area first, then they can create a service desk.

3. Creating a service desk

A service desk can be created in each area of Oak. Once created, it's populated with default settings, which you can then customise.

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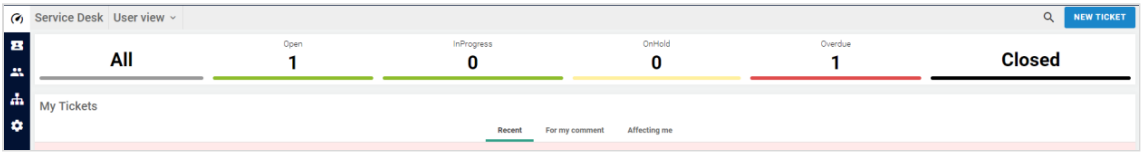
A user with the Admin security role can create a service desk in any area that doesn't already have one. Go to the **Actions button** > **Create** and select **Create Service Desk**. If a service desk already exists in the area, the Create menu shows **Create Ticket** instead.



Create Service Desk takes you straight to the new service desk's dashboard, while **Create Ticket** opens the ticket creation screen.

If there's no service desk in the area and you don't have the Admin security role, you won't see either option.

Once a service desk is created in an area, you can open it from the **Do** menu by selecting **My Service Desk**, which loads the dashboard. Oak provides a default set of options, so you can use the service desk and its functions as soon as it's activated. These defaults are fully customisable. Below is an example of the service desk dashboard.



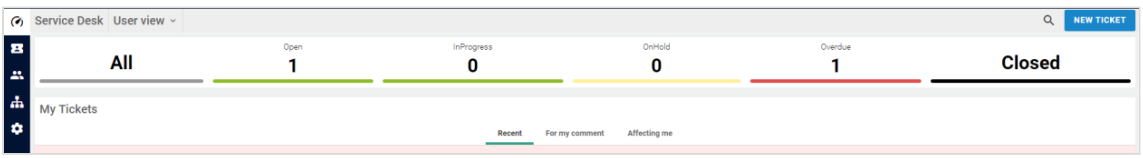
The dashboard gives you an at-a-glance view of current activity on the service desk, so you can get to your information and ticket queues quickly. Six tabs on the left give access to the other service desk functions, but you can create and manage tickets directly from the dashboard. The options available depend on the user's access level for the service desk, covered below.

The sidebar can be expanded or collapsed using the control at the bottom, for anyone who prefers a less cluttered view.

4. Your dashboard

The dashboard shows all the key information about your tickets, whether you're an engineer resolving them or a user raising them.

From the top bar you can switch between service desks by selecting **Service Desk**, which lets you move from one area's service desk to another. If you have more than one role, select **User View** to choose whether to view the service desk as an Admin, Engineer or User. The rest of the dashboard is split into two parts: **Status** and **Ticket Summary**.



The status bar across the top shows all tickets for this service desk and their current progress. Your access level controls how many statuses you can see, and admins can see them all. Selecting a heading opens the tickets view, filtered to that queue.

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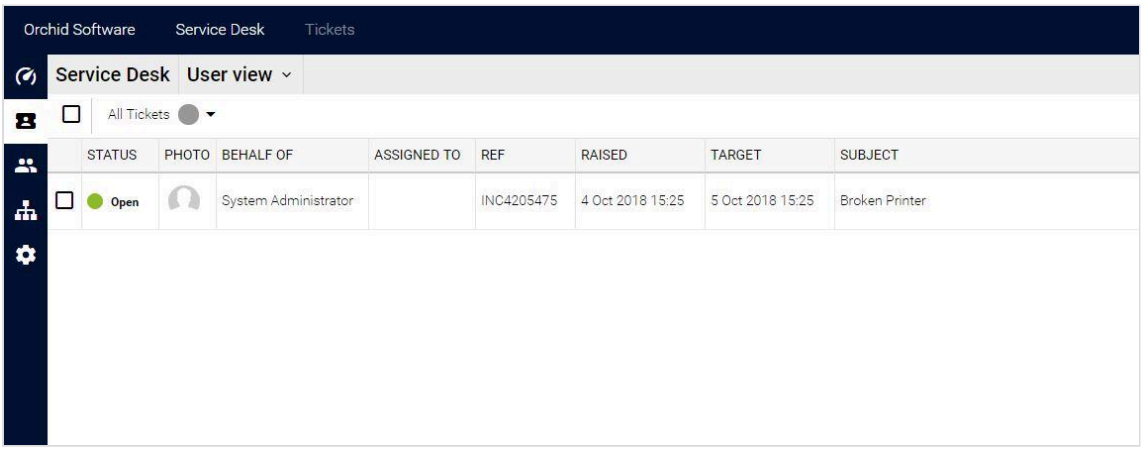
All	All tickets.
Unresolved	Any ticket that isn't closed or resolved.
Unassigned	Any ticket that doesn't have an engineer assigned yet.
Open	The default state for a ticket, used for unassigned tickets.
Assigned	All tickets that are In Progress, On Hold or Overdue.
In Progress	Any ticket with an engineer assigned.
On Hold	Any ticket actioned as On Hold.
Overdue	Any ticket that has gone over its SLA.
Resolved	Tickets the engineer considers complete.
Closed	Tickets closed by the end user.

The **My Queues** section shows tickets directly related to you, whatever their status. Filters let you view tickets with recent actions, tickets nearing their service level agreement (SLA) and tickets that have gone past it.

The dashboard refreshes automatically every minute to pull through new information.

5. Viewing your tickets

Select **Tickets** in the left-hand menu to see the currently available tickets. Filters show which tickets are assigned to which queues, which helps when sharing work between your engineers. Use the refresh button in the top right corner if you need to update the information.



Select a ticket to open it and see everything recorded so far. The options available are covered in section 10, Actioning a ticket.

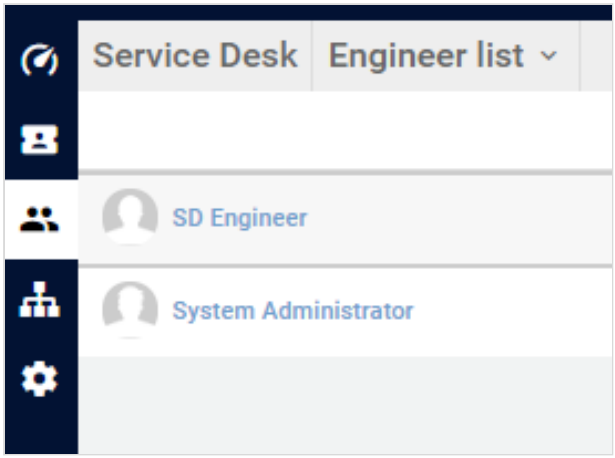
The information shown includes the ticket's status, assigned engineer, reference, queue and title. Detailed filters help you find a ticket, and an alternative activity view shows a progress bar for each ticket. The

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progress bar measures the time from when the ticket was opened to now, relative to its SLA. Each new action is added to the bar automatically, giving an at-a-glance view of how the ticket is being handled.

6. Managing your users

Users is the third option in the left-hand menu. It shows all Engineers and Admins assigned to the service desk, and you can select someone to view their profile, including their office, department and manager.

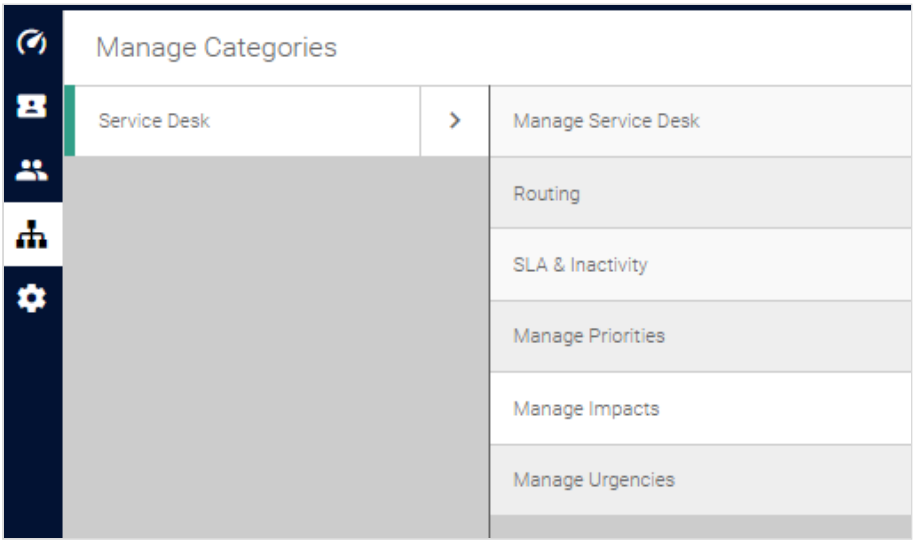


> This option is only available to Engineers and Admins, not Users.

7. Managing your categories

These options let you configure the categories for your different ticket types. When creating a ticket, the user can select a category, which routes the ticket to a specific queue. This is a useful way to manage the work coming into the service desk.

> These options are only available to Admins.



- **Creating a category**: select the green plus along the bottom of the screen, give the category a name and select **OK**. You can create child categories by adding to the level below.

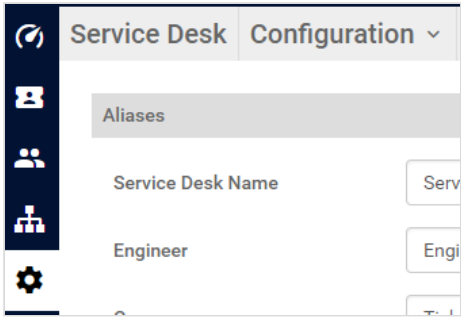
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- **Managing a category**: select a category to see the manage options, including **Move**, **Relocate**, **Duplicate** and **Delete**. **Routing** sets which queue a ticket is allocated to when it's given this category.
- **SLA & inactivity**: manage priorities, impacts and urgencies, and set the order they appear in the drop-down menus when creating a ticket.

> If you're using email with your service desk, make sure routing is set up so any emails received are routed to the correct place.

8. Configuring your service desk

Settings opens a list of options for configuring your service desk and personalising it to your organisation. Each service desk is separate, so configuring one won't affect another.

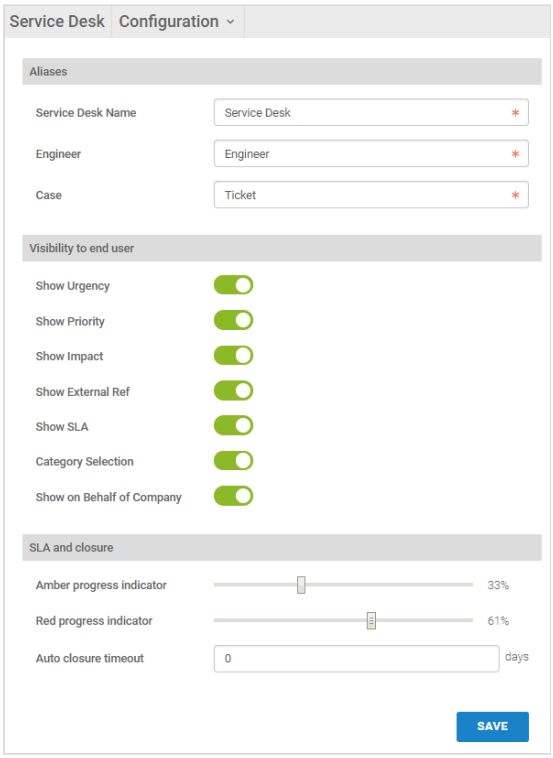


There are six pages of options: **Configuration**, **Types**, **Queues**, **Resolution Codes**, **Action Types** and **Mailboxes**. Select them from the drop-down menu, shown here with Configuration selected.

> These options are only available to Admins.

Configuration

Set the aliases for your Service Desk, Engineers and Tickets. These are specific to the service desk you're configuring and won't carry over to service desks in other areas.



The visibility options control what the person raising a ticket can choose when creating it, and what information they can see when reviewing their ticket from the dashboard. Whatever visibility options you choose, all actions appear in the ticket notes under actions taken, for engineers and admins to see.

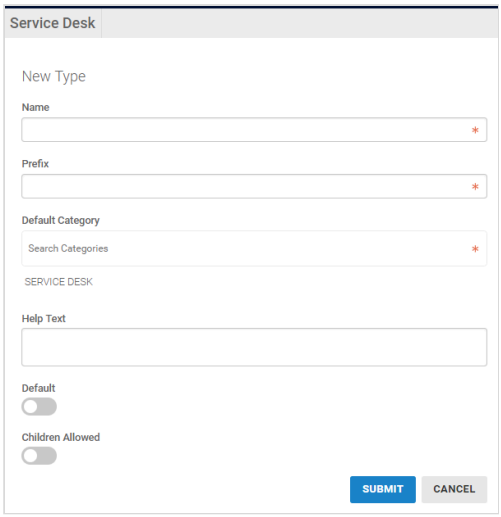
The **SLA and Closure** options let you set alerts and automatic closure periods. Automatic closure is the only way a ticket can be closed other than by the person who raised it.

Select **Save** to keep your changes. If you leave the page without saving, your changes are lost.

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Types

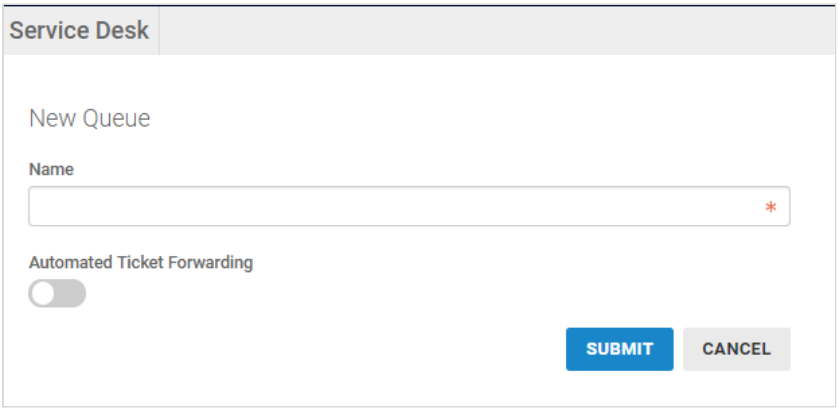
This page shows all current ticket types and lets you create new ones or edit existing ones. Select **New Type**, or an existing ticket type's name, to open the ticket type window.



- **Name** and **Prefix** appear with your ticket information in the service desk.
- **From Email** and **From Name** set who emails from the service desk appear to come from. If mail is set up correctly, replies to these emails are added to the ticket as actions automatically.
- Assign the **Category** and choose whether this is the default ticket type for that category.
- **Children Allowed** lets you create sub-tickets based on the main ticket.

Queues

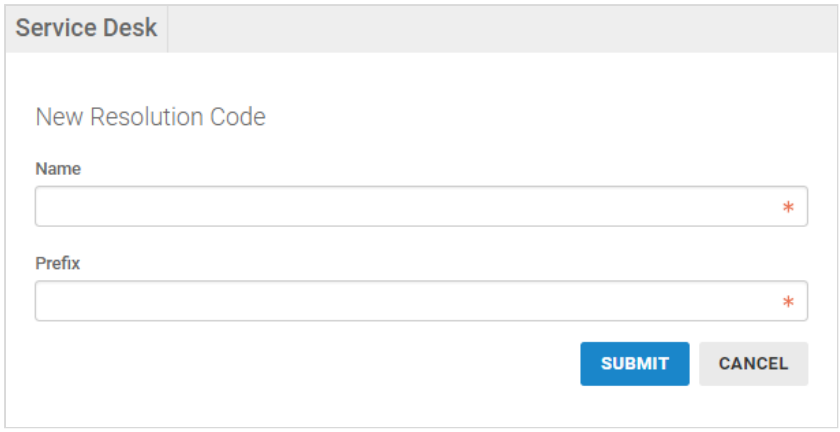
View your existing queues and create new ones to keep your service desk tidy and organised. To create a queue, select **New Queue** in the top right.



Resolution Codes

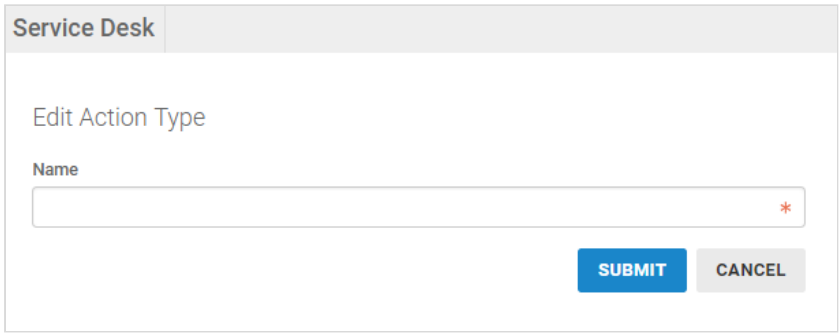
View existing resolution codes and create new ones by selecting **New Code** in the top right. The name and prefix set here are used to mark a ticket as complete, so resolved tickets are instantly recognisable.

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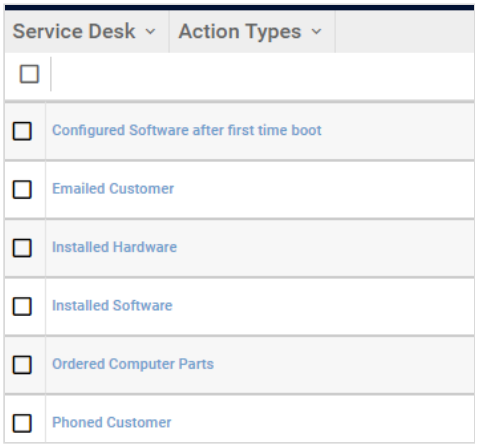


Action Types

View current action types and create new ones by selecting **New Type** in the top right. These can then be selected when creating and updating a ticket.



When configuring this part of the service desk, try to create all the actions you think your service desk will need. The more actions you create, the more accurate updates to a ticket can be. An admin can always come back later to add new actions or remove ones that aren't needed.



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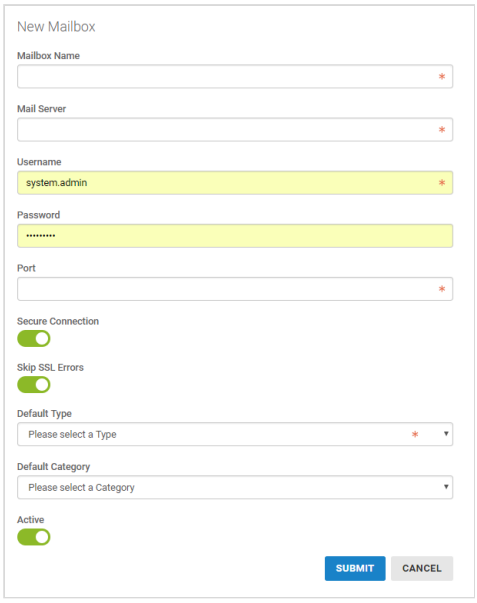
Mailboxes

View existing mailboxes or set up a new one. Mailboxes let the service desk receive incoming messages and send automatic emails to the users involved.

To use mailboxes, the Oak Integration Service version 2 (OIS v2.0) needs to be installed from **Site Settings**. If you need help installing or upgrading it, contact the Oak Support Team.

To create a mailbox, select **Add Mailbox** in the top right. To edit an existing mailbox, select its name. Both open the same screen.

A mailbox is set up like an email client, using the mail server, port number and security settings. If you're unsure of these details, speak to your IT team or email provider.

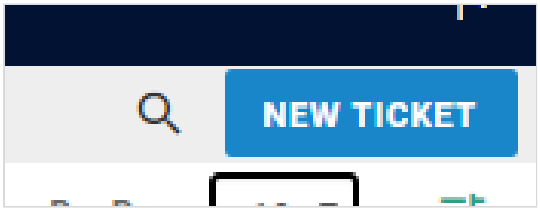


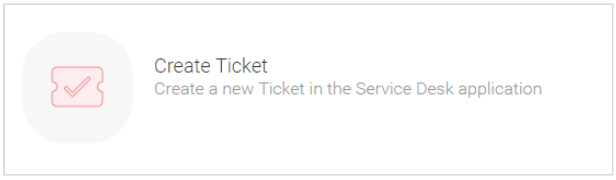
The mailbox can be linked to a specific category, so communication is directed to a particular mailbox.

Once a mailbox is set up, email exchanges are recorded automatically in the service desk. Emails sent from an Oak service desk include the ticket reference. Replies are recorded in the service desk and also go to the engineer's inbox, so once a ticket has been created, the whole conversation can happen by email with everything still recorded on the ticket.

9. Raising a ticket

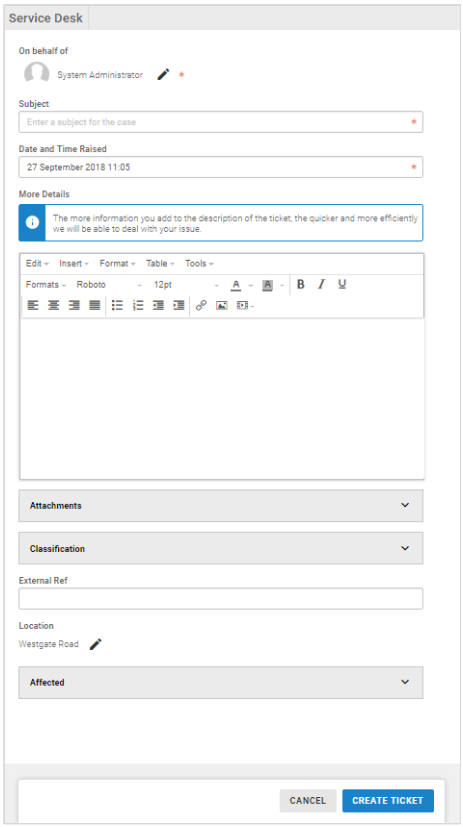
Select **New Ticket** in the top right of the dashboard to open the ticket creation screen. You can also create a ticket from the **Actions button** > **Create** > **Create Ticket**.





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Enter the ticket details on the screen that opens.



First, choose who raised the ticket. If the user can only raise tickets for themselves (Raise role), this is filled in with their name automatically. If they can raise tickets for others (Proxy Raise role), they can select another user.

Next, enter a subject, the time the issue was first noticed and the details of the issue in the **More Details** box, which works like the standard Oak content editor.

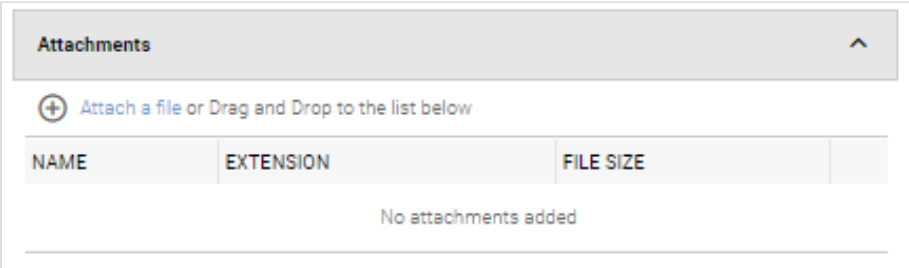
Users can also email the service desk directly to create a ticket. Once the email reaches the service desk's inbox, the Oak Integration Service picks it up and creates a ticket automatically, based on the routing options set up earlier. The ticket is unassigned and shown on the dashboard.

> If the person sending the email doesn't have the Raise security role, the service desk ignores the email. It isn't routed anywhere else and the sender isn't told. This protects the service desk from unwanted emails.

Attachments and classification

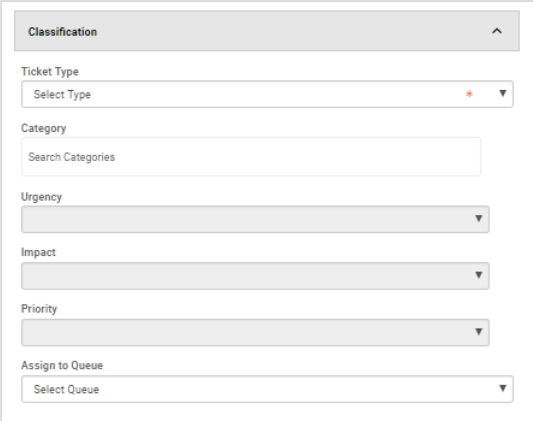
You can add more detail by attaching files, setting the classification and adding an external reference and location.

To attach images, documents or videos, drag and drop them into the attachments section, or select **Attach a File** to browse your computer.



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The classification options set the ticket type, category and queue, all configured in the configuration menu. Ticket type is the only required classification field.



Urgency, **Impact** and **Priority** can't be selected until a category is chosen. Admins and engineers can choose from all the options, while users can only choose from those preselected in the configuration menu.

Category, Urgency, Impact and Priority all affect how the ticket is treated on the dashboard.

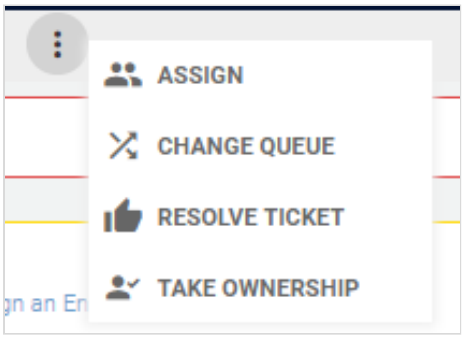
- **Assign to Queue** places the ticket in the right queue on the dashboard.
- **Location** assigns the ticket to the queue for that location. In Manage Categories you can set a default area that routes tickets to the main service desk, then set up secondary locations with their own queues. This gives you a second way to route tickets to a specific queue.
- **Affected** sets a business area that receives notifications when the ticket is updated.

When the user is happy with their ticket, they select **Create Ticket** at the bottom. The ticket is allocated to the relevant queue so an engineer can be assigned. Admins and engineers can change any of the ticket's options later.

10. Actioning a ticket

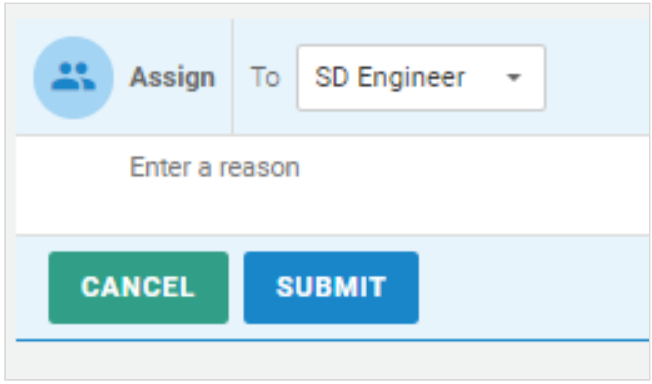
Assigning a ticket or taking ownership

Open the ticket from the dashboard or ticket list, select the three-dot options menu along the top bar, then choose **Assign** or **Take Ownership**. Only the user who has taken ownership of a ticket can action it.



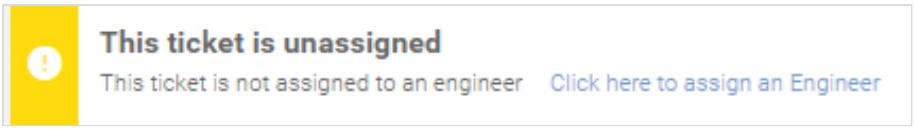
Take Ownership assigns the ticket to you.

Assign opens a box where you can assign the ticket to any other user with the Engineer or Admin role.



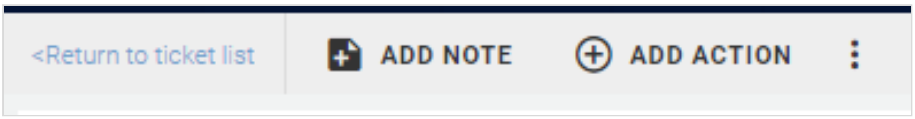
If no engineer is assigned, a message also appears so you can assign one.

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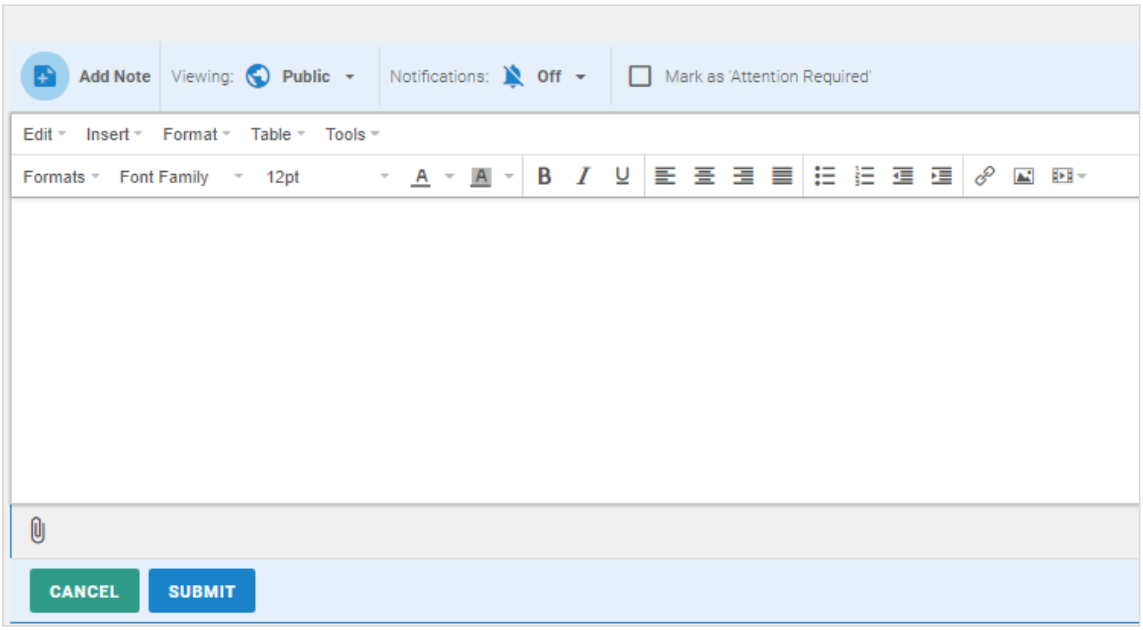


Adding an action or a note

Once an engineer or admin has taken ownership of a ticket, they can add to it, for example to record an action they've taken. Use **Add Action** or **Add Note** at the top of the ticket window.



- **Add Action** records activity on the ticket, such as a phone call, ordering supplies or sending an email. You can also record the date, time, time taken and action type.
- **Add Note** records information about the ticket, such as findings, updates or clarifications. Notes can include an attachment, using the paperclip at the bottom of the screen.



For both, you can make the entry **Public** (visible to everyone) or **Private** (visible only to this service desk's engineers and admins). You can also send a notification or mark it as attention required to alert the relevant people. A notification has three options, and you can select all of them:

- **On behalf of**: notifies the user the ticket was raised on behalf of, if it was proxy raised.
- **Reported by**: notifies the user who created the ticket.
- **Affected users**: notifies everyone in the affected area set when the ticket was created.

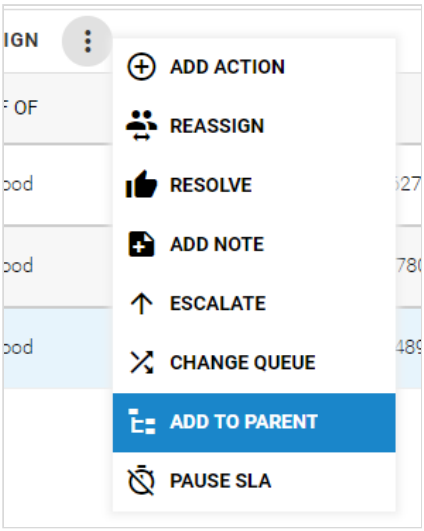
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Linking a ticket to a parent ticket

If several tickets are related, you can make them children of another ticket. On the tickets screen, tick the box next to the ticket, open the options menu and select **Add to Parent**.

In the box that opens, use the filters to narrow down the tickets, then select **Search** to list them. Highlight the right ticket and select **Assign as Parent Ticket**.

Any child tickets are shown at the bottom of the parent ticket's details screen.



Adding an action to a parent ticket

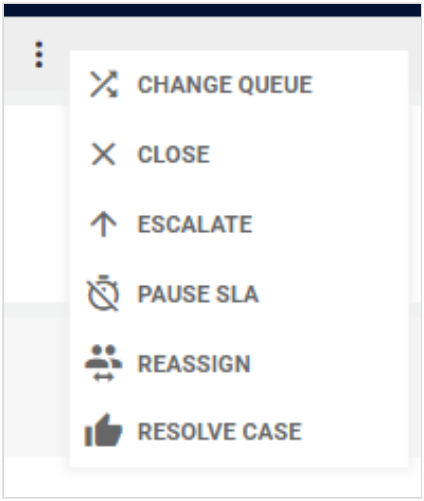
When you add a note or action to a parent ticket that has child tickets, you're asked whether to add it to the child tickets too. This only works from parent to child, not the other way round.

The options menu

The three-dot options menu shows options relevant to the ticket and what you're doing. If you want to change an open ticket, the option is likely to be here.

Change Queue moves the ticket to another queue, and **Reassign** gives it to another engineer. For example, a first-line engineer could take ownership of a ticket, ask questions and investigate, then select **Escalate** to pass it to a second-line engineer and move it to a higher-priority queue.

If the person who raised the ticket needs to provide information they don't have yet, the ticket can be put on hold until they do. **Pause SLA** puts the ticket on hold.



Notes and actions can be added until the ticket is resolved to the engineer's satisfaction or closed by the person who raised it. The ticket closes automatically if it goes over the time set in the configuration menu.

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Ticket progress bar

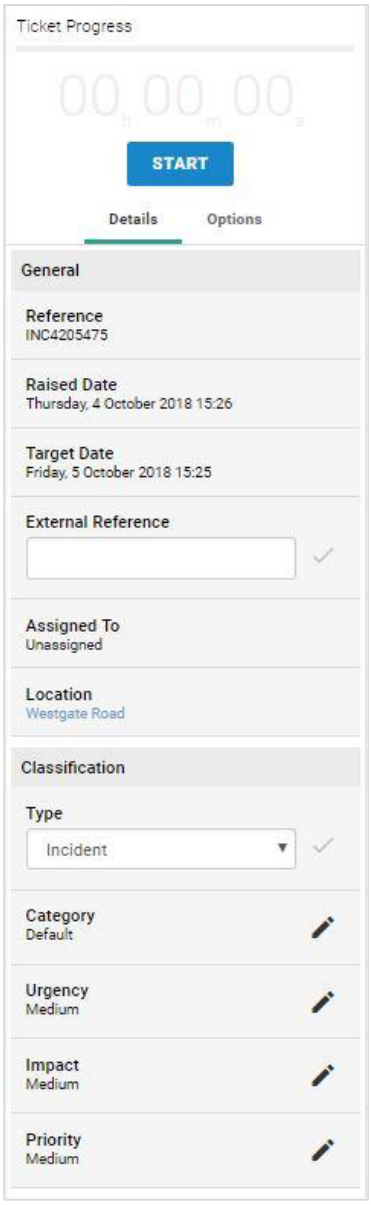
The ticket panel gives an at-a-glance view of the ticket's details, including its status, reference number, who raised it and on whose behalf, and its agreed service levels.

A timer is available if you need to record the time taken. You can reset it once it has started.

A colour-coded progress bar along the top shows where the ticket is relative to its SLA. Actions and notes appear as pips on the bar. Hover over a pip and select it to see a breakdown of what happened on that date.

The classification is also shown here, and engineers and admins can change it directly using the pen icon on the right.

The second tab, **Options**, shows any attachments and affected areas.



11. Resolving and closing a ticket

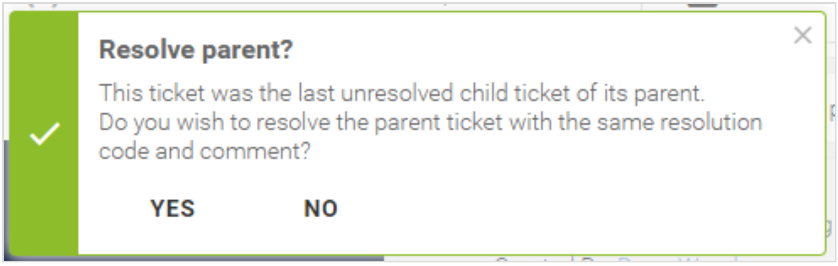
When the engineer considers a ticket complete, they select **Resolve** from the options menu.



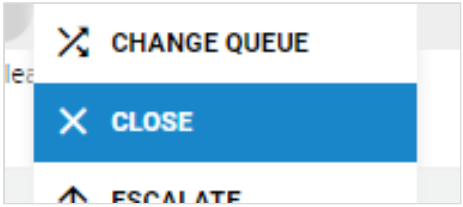
The ticket's status changes to resolved and its code updates to the one set in the configuration menu. A resolved ticket isn't yet closed.

If you resolve a parent ticket with child tickets, you're asked whether to resolve the child tickets too. Resolving a child ticket doesn't affect the other child tickets or the parent, except when it's the last unresolved child ticket, when you're asked whether to resolve the parent too.

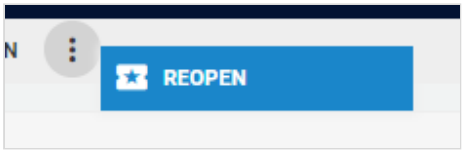
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A ticket can only be closed by the user it was raised on behalf of, as they're the one who knows when the issue is fully resolved. To close it, open the options menu, select **Close**, enter a reason and select **Submit**.



To reopen a ticket, open it, select **Reopen** from the options menu, enter a reason and select **Submit**. The ticket goes back into its previous queue.



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