issuetrak

help desk overview

sit back and relax. let's chat for a minute.

6160 kempsville circle, suite 101b
norfolk, va 23502
www.issuetrak.com

issuetrak

about issuetrak

- founded in 1992 as a custom development company
- Issuetrak software first release in 2000
- privately owned
- 2000+ clients in 36+ countries
- cloud or on-premises deployment options
- customizable, flexible, robust
- Virginia-based support and development
- 85% renewal rate

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who uses issuetrak

companies that found a better way to get things done

SAMSUNG

Carnival

verizon

CINTAS

PEPSICO

Goodwill Central and Coastal Virginia

HARLEY-DAVIDSON MOTOR COMPANY

THE FRESH MARKET

IOWA STATE UNIVERSITY

Pfizer

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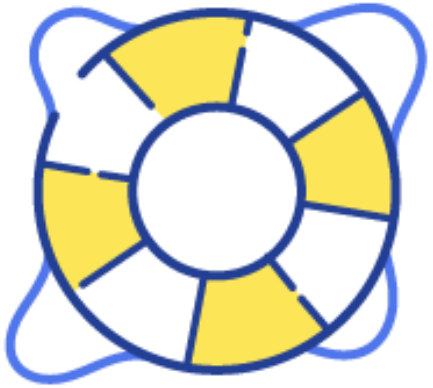
how is issuetrak used



help desk

Improve efficiency with a versatile help desk application. Leverage an intuitive interface, flexible business rules, & expert support.

Communicate with your end users, work issues to a documented resolution with customized workflow, monitor response times, and report on results.

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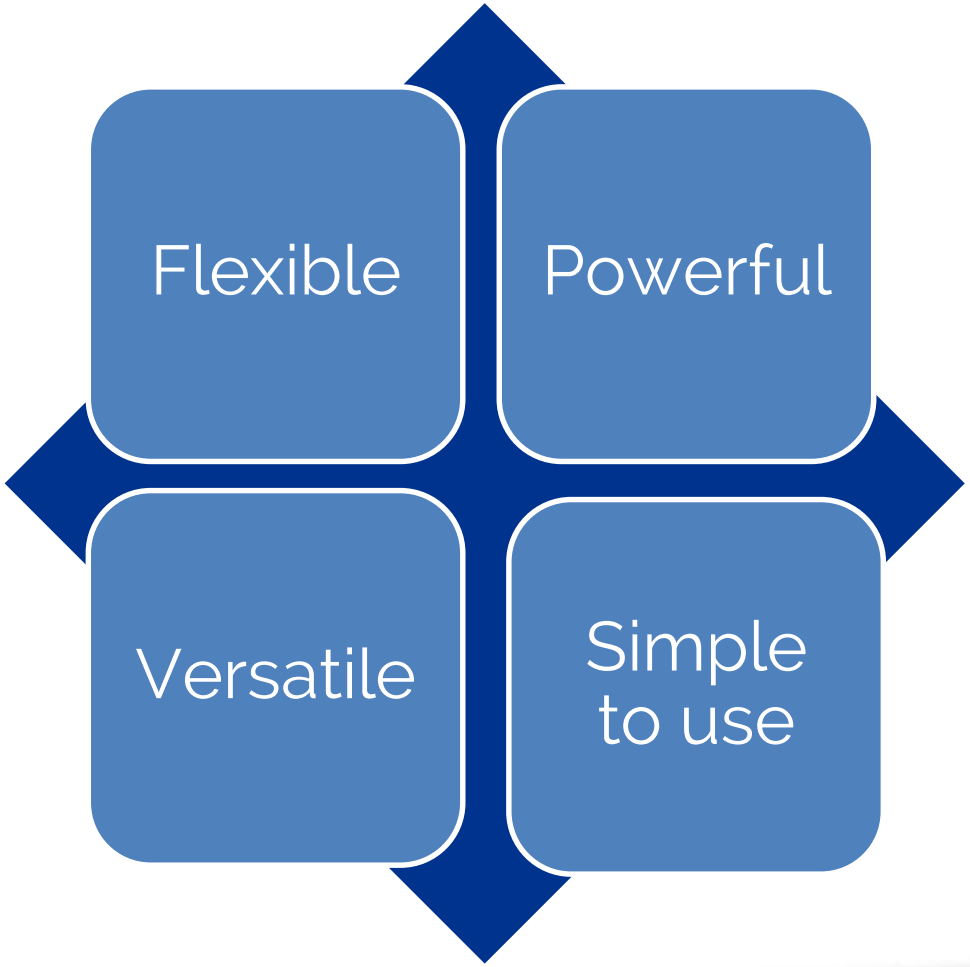
why use issuetrak



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what you need to use issuetrak

Runs on any modern computer or mobile device with an active internet connection.

Supports modern versions of Chrome, Firefox, & Internet Explorer. Other browsers such as Safari or Opera may also be used.

Can be Active Directory (AD) enabled, allowing employees to use their network login credentials to use Issuetrak.

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timeline for setup

Every installation and need is unique so these are only guidelines:

- Site configuration – 1 to 2 weeks
- Testing and documentation – 1 to 2 weeks
- Final release testing and user training – 2 to 3 weeks

The timeline might be shorter or longer depending on setup complexity.

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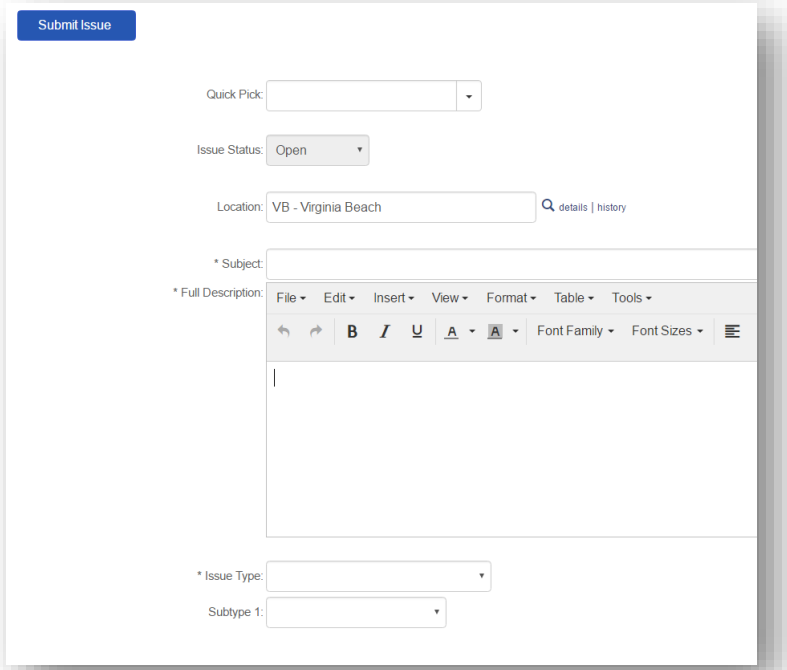
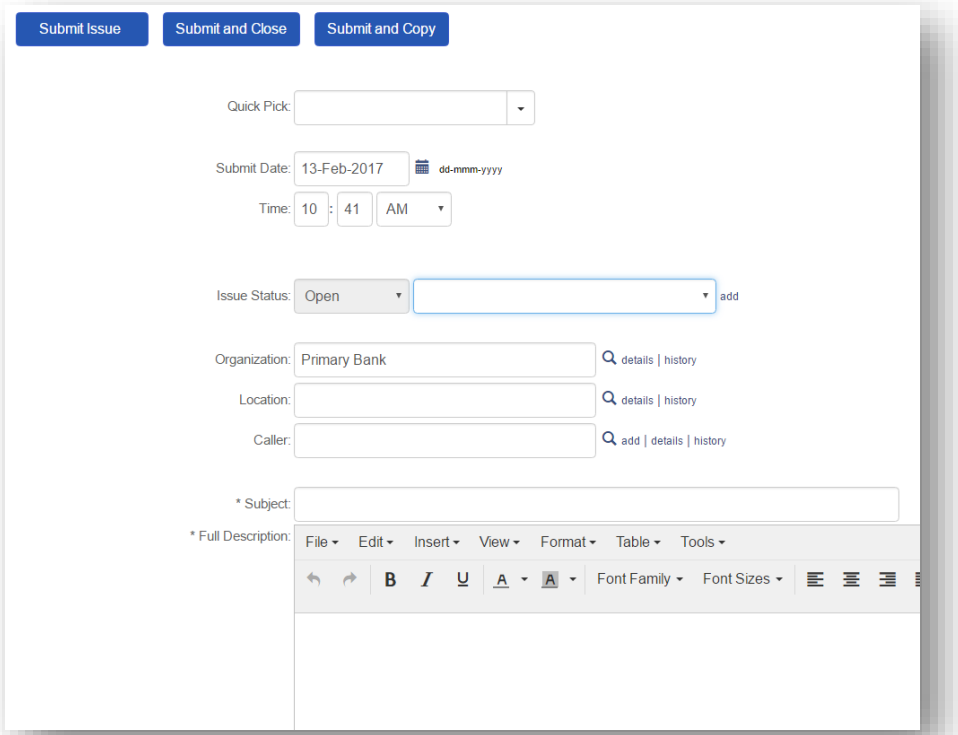
submit issue view



end user view



agent user view

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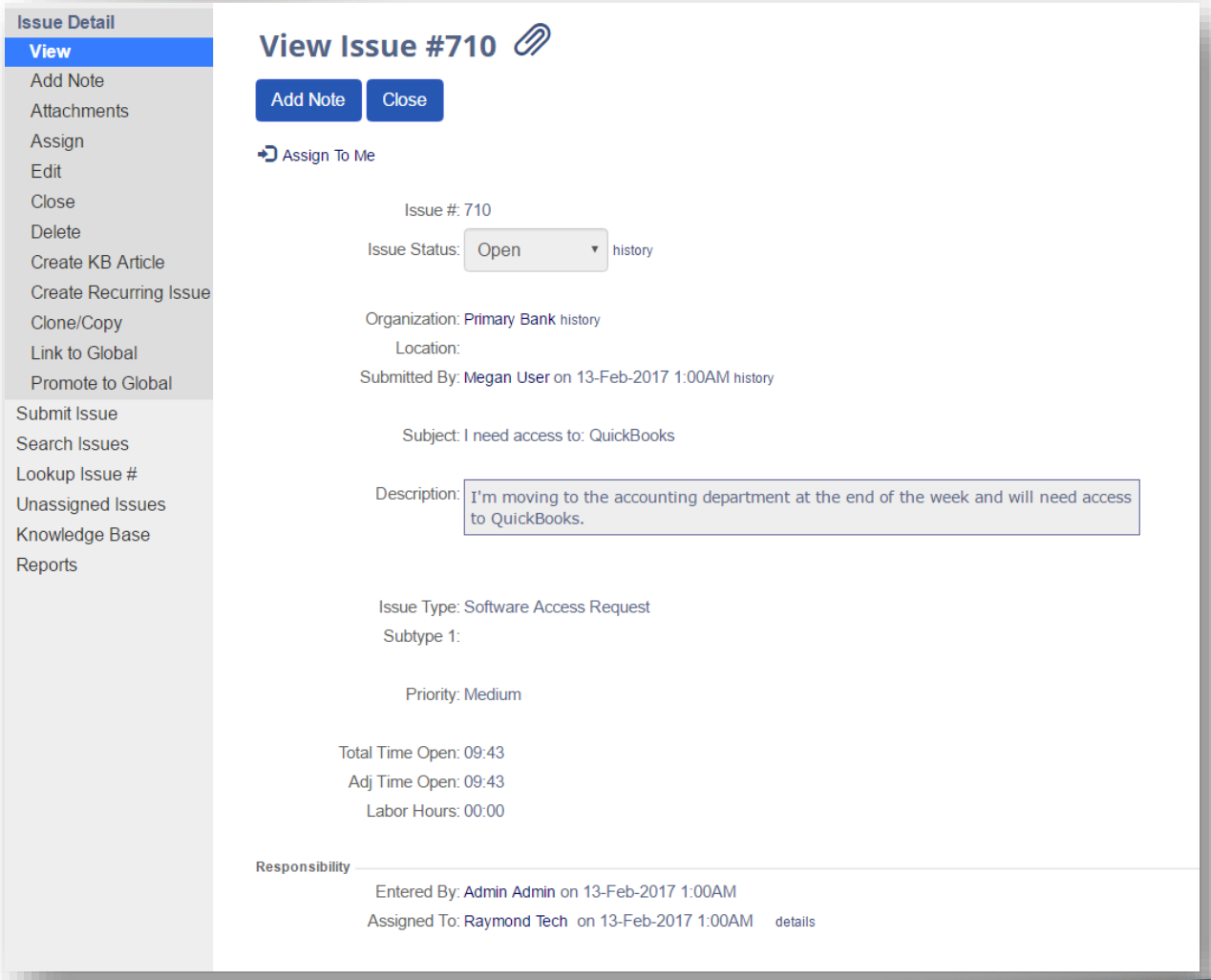

working with issues

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my issues

- A commonly used Issuetrak homepage
- Open Issues – series of tabs representing roles a person plays on issues
- Global Issues – quick link to submit an occurrence of a known problem
- My Reports – shortcuts to run any Saved Searches or Reports you have created or that are shared with you

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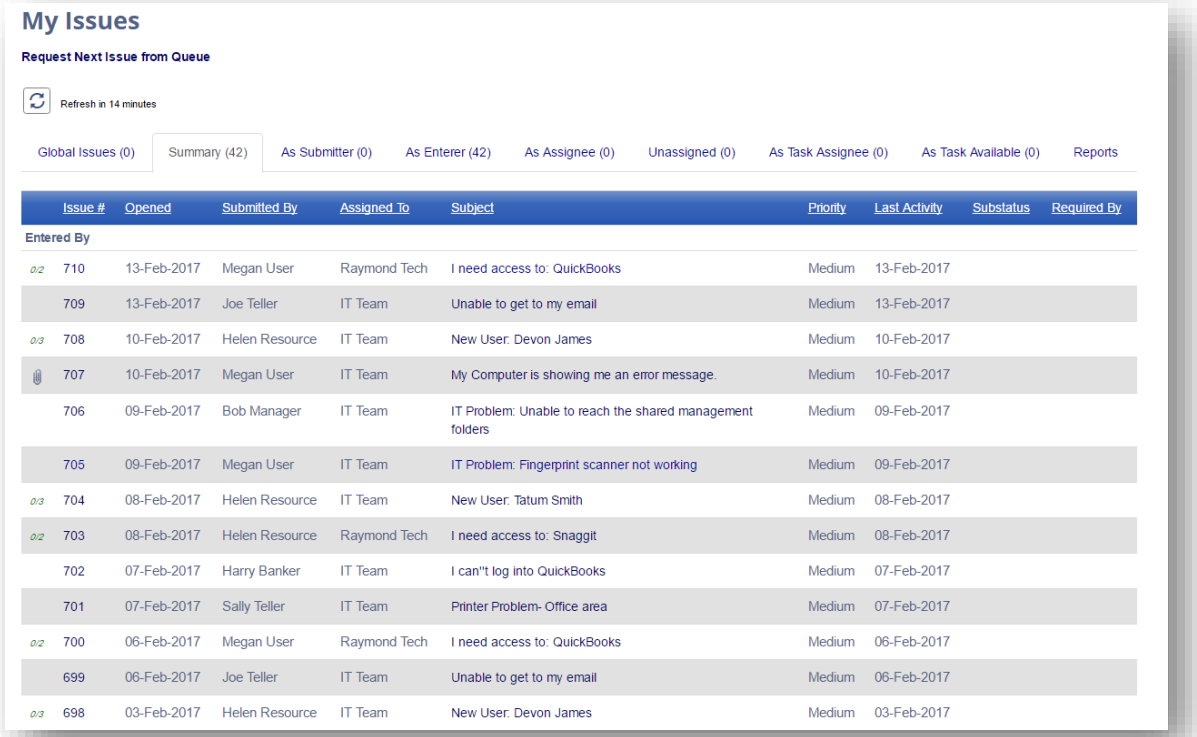
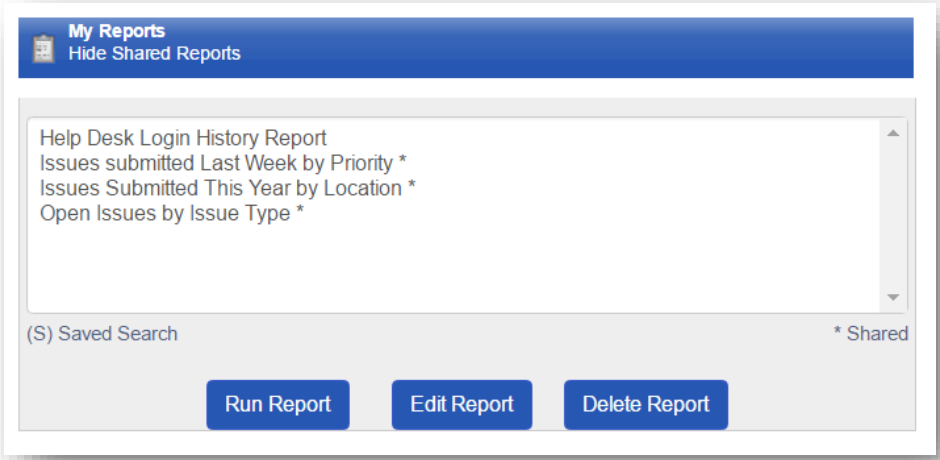
my issues

tabs for roles and reports



	Issue #	Opened	Submitted By	Assigned To	Subject	Priority	Last Activity	Substatus	Required By
Entered By									
0/2	710	13-Feb-2017	Megan User	Raymond Tech	I need access to: QuickBooks	Medium	13-Feb-2017		
	709	13-Feb-2017	Joe Teller	IT Team	Unable to get to my email	Medium	13-Feb-2017		
0/3	708	10-Feb-2017	Helen Resource	IT Team	New User: Devon James	Medium	10-Feb-2017		
	707	10-Feb-2017	Megan User	IT Team	My Computer is showing me an error message.	Medium	10-Feb-2017		
	706	09-Feb-2017	Bob Manager	IT Team	IT Problem: Unable to reach the shared management folders	Medium	09-Feb-2017		
	705	09-Feb-2017	Megan User	IT Team	IT Problem: Fingerprint scanner not working	Medium	09-Feb-2017		
0/3	704	08-Feb-2017	Helen Resource	IT Team	New User: Tatum Smith	Medium	08-Feb-2017		
0/2	703	08-Feb-2017	Helen Resource	Raymond Tech	I need access to: Snaggit	Medium	08-Feb-2017		
	702	07-Feb-2017	Harry Banker	IT Team	I can''t log into QuickBooks	Medium	07-Feb-2017		
	701	07-Feb-2017	Sally Teller	IT Team	Printer Problem- Office area	Medium	07-Feb-2017		
0/2	700	06-Feb-2017	Megan User	Raymond Tech	I need access to: QuickBooks	Medium	06-Feb-2017		
	699	06-Feb-2017	Joe Teller	IT Team	Unable to get to my email	Medium	06-Feb-2017		
0/3	698	03-Feb-2017	Helen Resource	IT Team	New User: Devon James	Medium	03-Feb-2017		



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issue view and access

- Users can view any issue they play a role in. However, certain fields on the issue are only visible with the appropriate user or group permissions.
- When granted permission to view issues submitted by others, users may be limited by Department or Organization.
- Searches, Reports, & the Dashboard only show issues the user is allowed to see.
- Based on permissions, even the submit issue screen may look different, with alternate drop down fields and values.

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dashboard

System Overview

Open Issues	42
Assigned Issues	42
Unassigned Issues	0
Issues Escalated	0

Open Issues by Priority

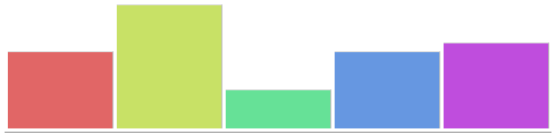
Priority	Count
Medium	42

Open Issues by Assignee

Assignee	Count
IT Team	33
Raymond Tech	9

Open Issues by Issue Type

Issue Type	Count
Hardware	8
Applications	13
Network	4
Service Request	8
Software Access Request	9



Open Issues by Location

Location	Count
Chesapeake	4
Norfolk	4
Virginia Beach	12
Williamsburg	8

Monthly Performance

Last 3 months	Opened	Closed	Reopened
Feb 2017	18	20	0
Jan 2017	44	42	0
Dec 2016	44	46	0

Times are formatted as hh:mm

Issue#	Status	Opened	Submitted By	Assigned To	Subject	Priority	Issue Type	Last Activity
672	Open	17-Jan-2017 1:00AM	Harry Banker	IT Team	I can't log into QuickBooks	Medium	Applications QuickBooks	17-Jan-2017 1:00AM
675	Open	19-Jan-2017 1:00AM	Megan User	IT Team	IT Problem: Fingerprint scanner not working	Medium	Hardware Workstation	19-Jan-2017 1:00AM
677	Open	20-Jan-2017 1:00AM	Megan User	IT Team	My Computer is showing me an error message.	Medium	Applications Office	20-Jan-2017 1:00AM
682	Open	24-Jan-2017 1:00AM	Harry Banker	IT Team	I can't log into QuickBooks	Medium	Applications QuickBooks	24-Jan-2017 1:00AM
685	Open	26-Jan-2017 1:00AM	Megan User	IT Team	IT Problem: Fingerprint scanner not working	Medium	Hardware Workstation	26-Jan-2017 1:00AM
687	Open	27-Jan-2017 1:00AM	Megan User	IT Team	My Computer is showing me an error message.	Medium	Applications Office	27-Jan-2017 1:00AM
692	Open	31-Jan-2017 1:00AM	Harry Banker	IT Team	I can't log into QuickBooks	Medium	Applications QuickBooks	31-Jan-2017 1:00AM
695	Open	02-Feb-2017 1:00AM	Megan User	IT Team	IT Problem: Fingerprint scanner not working	Medium	Hardware Workstation	02-Feb-2017 1:00AM
697	Open	03-Feb-2017 1:00AM	Megan User	IT Team	My Computer is showing me an error message.	Medium	Applications Office	03-Feb-2017 1:00AM
702	Open	07-Feb-2017 1:00AM	Harry Banker	IT Team	I can't log into QuickBooks	Medium	Applications QuickBooks	07-Feb-2017 1:00AM
705	Open	09-Feb-2017 1:00AM	Megan User	IT Team	IT Problem: Fingerprint scanner not working	Medium	Hardware Workstation	09-Feb-2017 1:00AM
707	Open	10-Feb-2017 1:00AM	Megan User	IT Team	My Computer is showing me an error message.	Medium	Applications Office	10-Feb-2017 1:00AM

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escalation rules

- Automatically flag as escalated and take action on Issues that remain open or idle for too long.

- Ensure assignees and submitters never neglect or abandon Issues, especially when using other business rules with email notifications.

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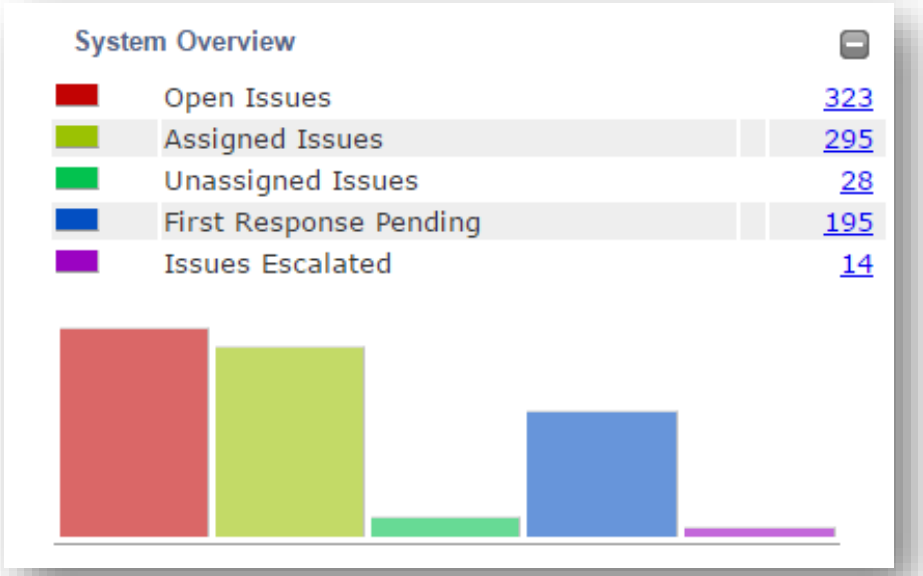
escalation rules

dashboard panel



escalated report from dashboard

	Issue#	Status	Opened	Submitted By	Organization	Assigned To	Next Action	Subject	Priority	Severity	Issue Type
E	1061	Open Assigned In Process	01/21/2014 3:28PM	Manager Facility	Parent Company	Admin User		My email account is not receiving new email	Medium		Applications Email
L E	1062	Open Pending Assignment	01/21/2014 3:30PM	Mary Sales	Parent Company	Tech User		I can't open a document	Medium	Medium	Applications Accounting
E	1069	Open Reassigned	01/21/2014 3:56PM	Customer Service Technician	Parent Company	Alan Bean		Do not contact request	Medium		Finance Do Not Contact Request
E	1074	Open	01/21/2014 4:39PM	Manager Shipping	Parent Company			Unable to print labels.	High	Medium	Information Technology Cloud Services
E	1082	Open Pending Assignment	01/22/2014 11:41AM	Mary Sales	Parent Company			Please reset my password for the CRM system	High		Password

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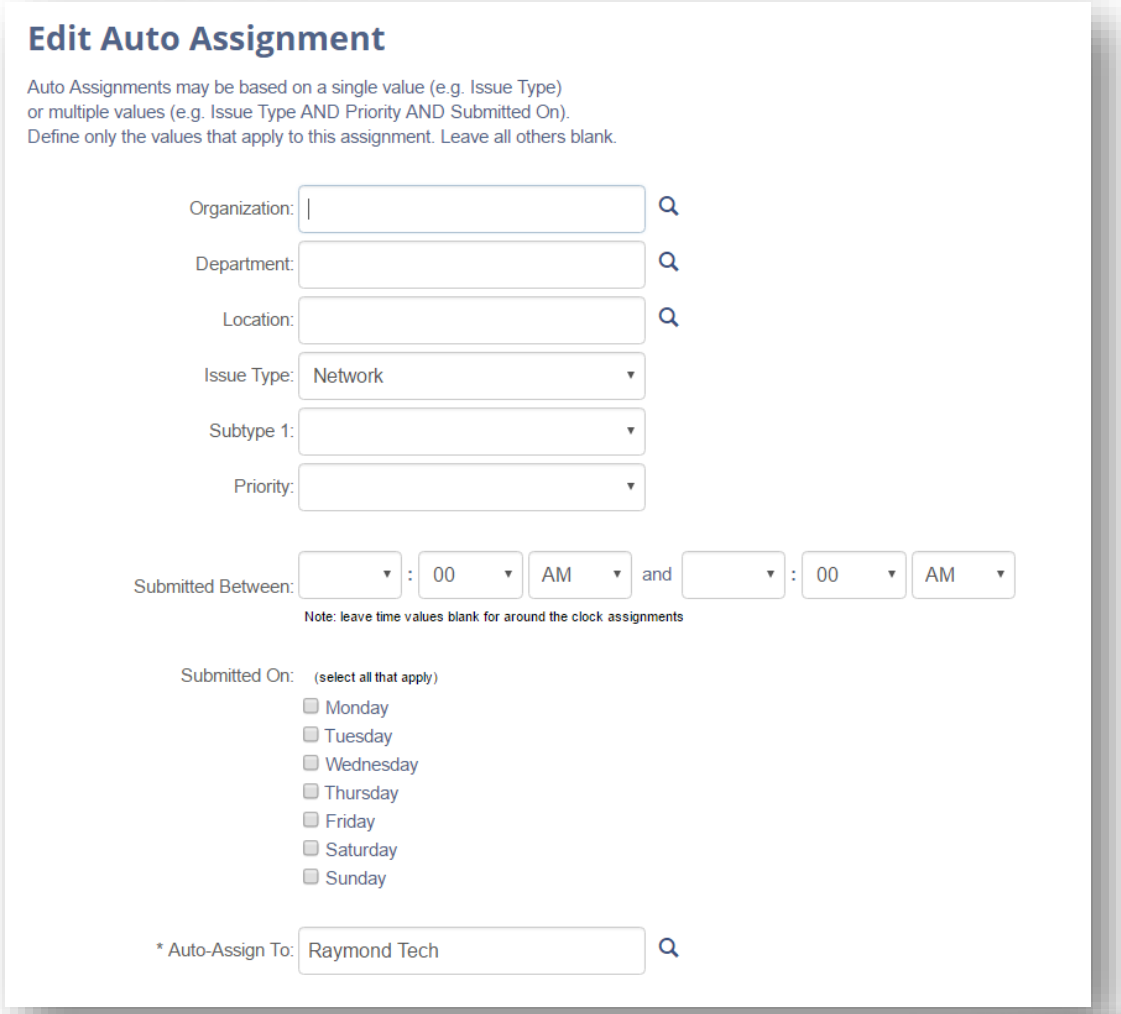

auto assignment rules

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knowledge base

- Knowledge base (KB) is a convenient online reference area for accessing information relevant to your operation.
- Users may access different categories of KB articles quickly and easily, facilitating prompt problem definition and resolution. Articles and categories can be restricted based on group or organization membership.
- Use the KB for installation instructions, trouble-shooting guides, FAQs, solutions to common problems, policies/procedures, etc.

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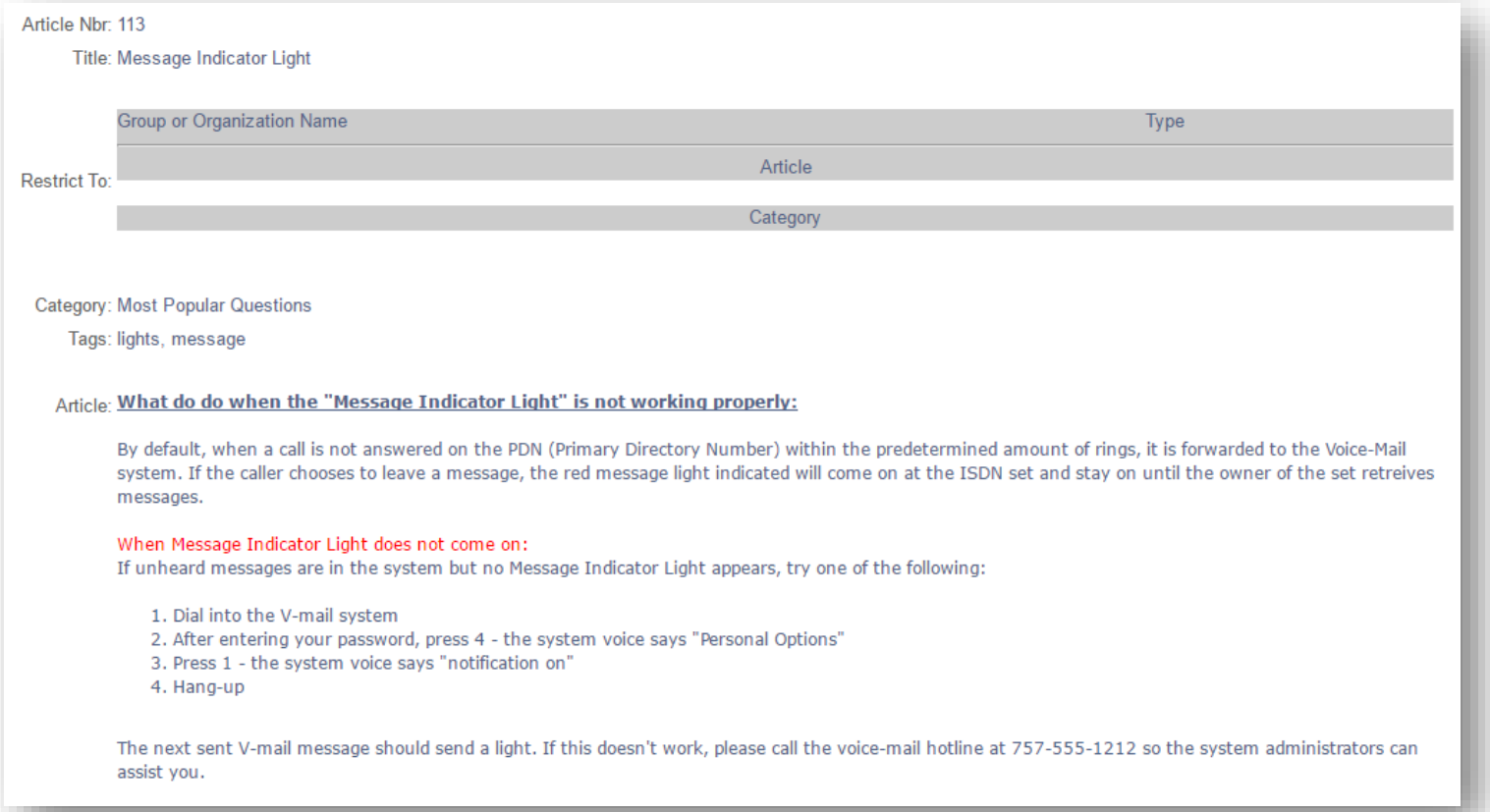

Article Nbr: 113

Title: Message Indicator Light

Restrict To:

Group or Organization Name	Type
Article	
Category	

Category: Most Popular Questions

Tags: lights, message

Article: **What do do when the "Message Indicator Light" is not working properly:**

By default, when a call is not answered on the PDN (Primary Directory Number) within the predetermined amount of rings, it is forwarded to the Voice-Mail system. If the caller chooses to leave a message, the red message light indicated will come on at the ISDN set and stay on until the owner of the set retreives messages.

When Message Indicator Light does not come on:
If unheard messages are in the system but no Message Indicator Light appears, try one of the following:

1. Dial into the V-mail system
2. After entering your password, press 4 - the system voice says "Personal Options"
3. Press 1 - the system voice says "notification on"
4. Hang-up

The next sent V-mail message should send a light. If this doesn't work, please call the voice-mail hotline at 757-555-1212 so the system administrators can assist you.

knowledge base article

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what are tasks

- can be discrete actions and/or a consistent workflow
- can be assigned to and assigned by any user or groups
- can restrict tasks and task groups to particular groups and/or organizations
- can notify users via email when their tasks are available to complete
- can cancel subsequent tasks depending on the response of Yes, No, or N/A
- can change issue substatus or add workflow automatically based on a Yes, No, or N/A response
- can close issues based on a Yes, No, or N/A response
- can associate labor hours and notes
- can establish dependencies among tasks

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workflow

dynamically add tasks as you respond

	Task	Assigned To	Completed	Time
	Is employee full time?		Yes | No | N/A	00:00

	Task	Assigned To	Completed	Time
YES	Is employee full time?		07-Feb-2017 03:41PM	00:00
YES	Does employee Need Insurance?		07-Feb-2017 03:41PM	00:00
	Enrolled in Medical		Yes | No | N/A	00:00
	Enrolled in Dental		Yes | No | N/A	00:00
	Enrolled in Supplemental		Yes | No | N/A	00:00
	Enrolled in Vision		Yes | No | N/A	00:00
	Enrolled in Life Insurance		Yes | No | N/A	00:00

	Task	Assigned To	Completed	Time
YES	Is employee full time?		07-Feb-2017 03:41PM	00:00
YES	Does employee Need Insurance?		07-Feb-2017 03:41PM	00:00
YES	Enrolled in Medical		07-Feb-2017 03:42PM	00:00
YES	Enrolled in Dental		07-Feb-2017 03:42PM	00:00
NO	Enrolled in Supplemental		07-Feb-2017 03:42PM	00:00
YES	Enrolled in Vision		07-Feb-2017 03:42PM	00:00
NO	Enrolled in Life Insurance		07-Feb-2017 03:42PM	00:00
NO	Is employee remote?		07-Feb-2017 03:42PM	00:00
✓	Identify Workspace	Engineer, Edward	07-Feb-2017 03:42PM	00:00
YES	Prepare Work Area	Janitor, Bob	07-Feb-2017 03:42PM	00:00
YES	Create Security Badge	Human Resources	07-Feb-2017 03:42PM	00:00
YES	Is a door key needed?		07-Feb-2017 03:42PM	00:00
YES	Get door key made	Human Resources	07-Feb-2017 03:42PM	00:00
YES	Is Phone Needed?		07-Feb-2017 03:42PM	00:00
✓	Phone line setup	IT	07-Feb-2017 03:42PM	00:00
YES	Unit delivered	IT	07-Feb-2017 03:42PM	00:00
YES	Headset delivered	IT	07-Feb-2017 03:42PM	00:00
YES	Is IT equipment needed?		07-Feb-2017 03:42PM	00:00
NO	Laptop Needed		07-Feb-2017 03:42PM	00:00
YES	Desktop Needed		07-Feb-2017 03:42PM	00:00
NO	Second Monitor Needed?		07-Feb-2017 03:42PM	00:00

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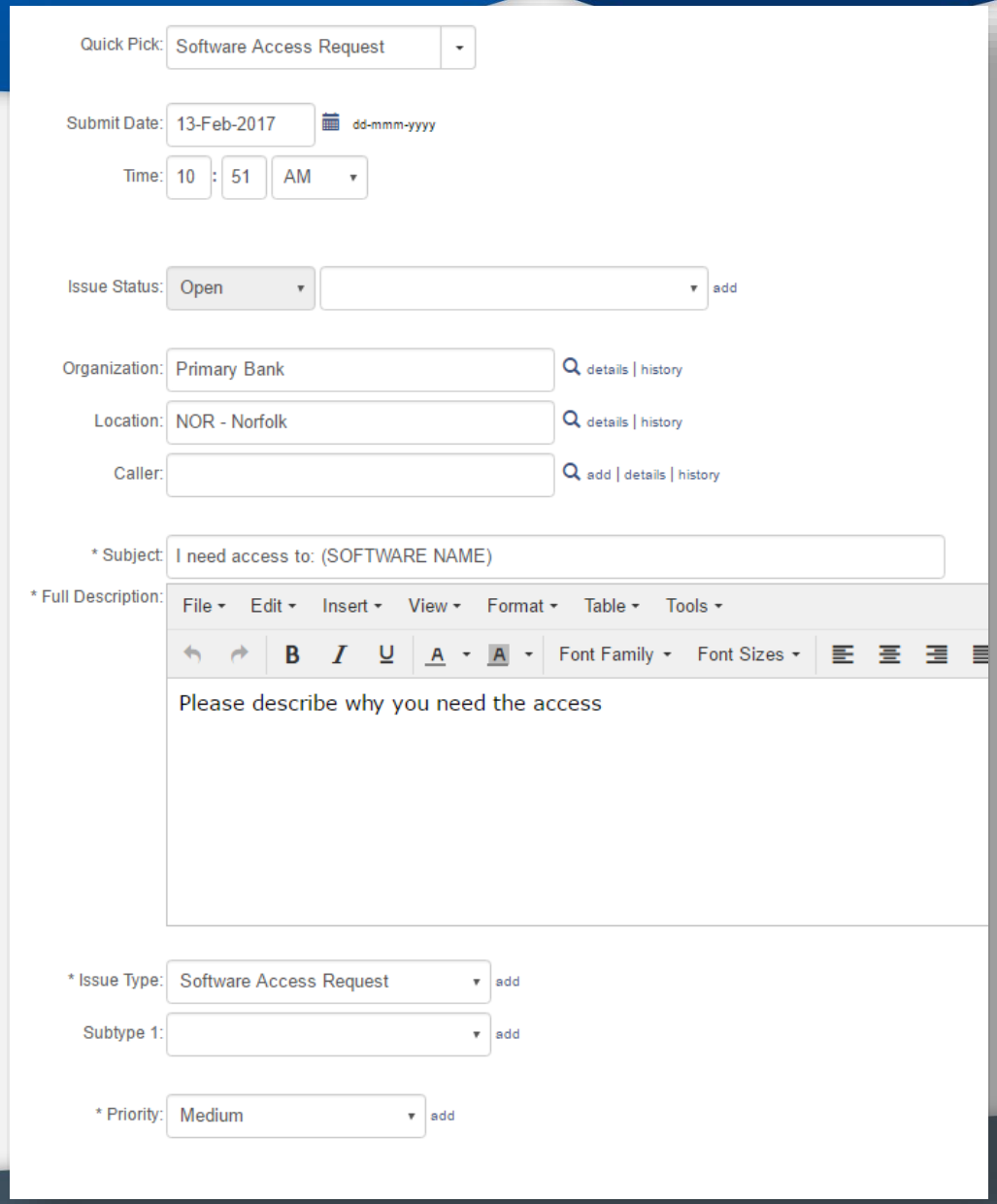
"quick pick" submission template



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reports

- Summary reports – built in system reports
- Saved searches – quick and easy retrievals of stored search criteria
- Report writer – create your own sophisticated reports, including step-by-step query building
- Scheduled reports – automatically deliver Saved Searches and Report Writer reports at set intervals to specific users via email in excel or html format
- Saved searches and report writer reports may be “shared” on a case-by-case basis, making them accessible to other users.

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search – search results report

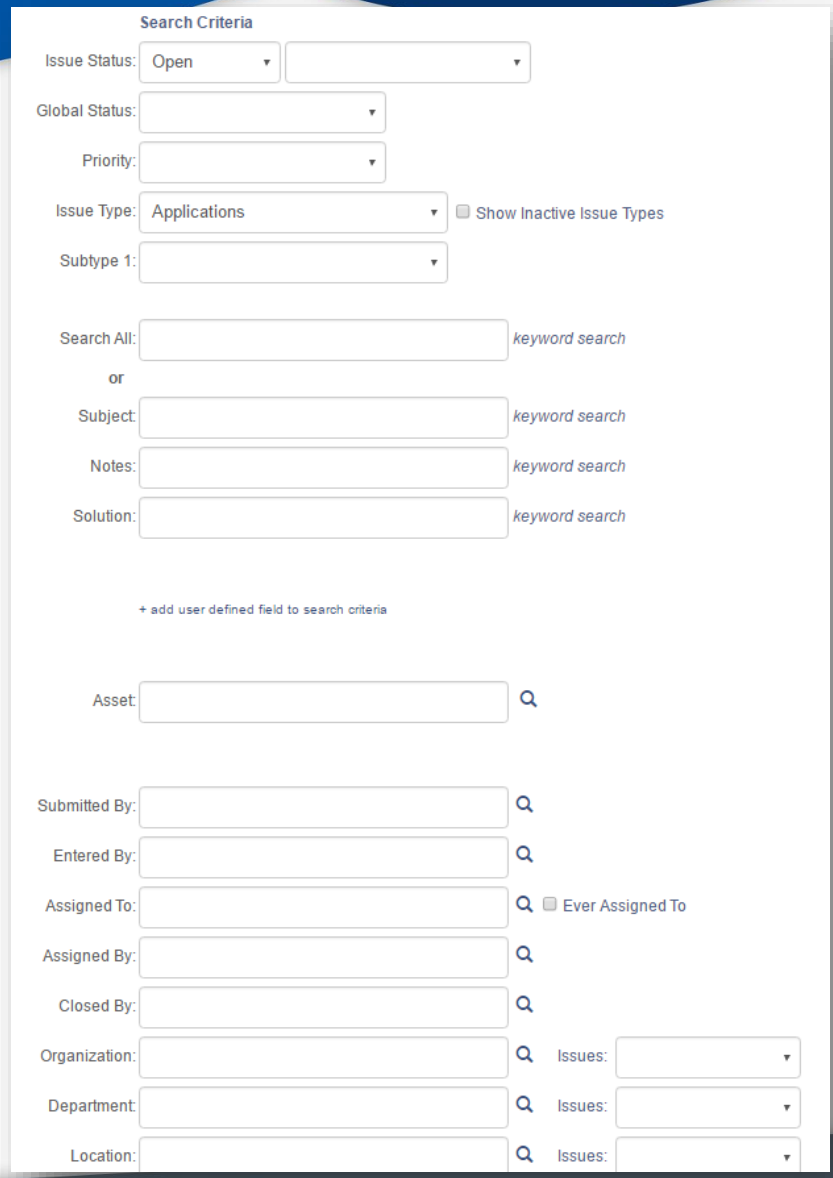
Search Results

Back

Export To Excel: Brief | Detailed

Number of Issues that Matched: 13
Issue Status: Open
Issue Type: Applications
Sorted By: No sort selected

Global Status	Issue#	Opened	By	Status	Issue Type	Subject	Assigned To
	669	16-Jan-2017	Joe Teller	Open	Applications	Unable to get to my email	IT Team
	672	17-Jan-2017	Harry Banker	Open	Applications	I can"t log into QuickBooks	IT Team
	677	20-Jan-2017	Megan User	Open	Applications	My Computer is showing me an error message.	IT Team
	679	23-Jan-2017	Joe Teller	Open	Applications	Unable to get to my email	IT Team
	682	24-Jan-2017	Harry Banker	Open	Applications	I can"t log into QuickBooks	IT Team
	687	27-Jan-2017	Megan User	Open	Applications	My Computer is showing me an error message.	IT Team
	689	30-Jan-2017	Joe Teller	Open	Applications	Unable to get to my email	IT Team
	692	31-Jan-2017	Harry Banker	Open	Applications	I can"t log into QuickBooks	IT Team
	697	03-Feb-2017	Megan User	Open	Applications	My Computer is showing me an error message.	IT Team
	699	06-Feb-2017	Joe Teller	Open	Applications	Unable to get to my email	IT Team
	702	07-Feb-2017	Harry Banker	Open	Applications	I can"t log into QuickBooks	IT Team
	707	10-Feb-2017	Megan User	Open	Applications	My Computer is showing me an error message.	IT Team
	709	13-Feb-2017	Joe Teller	Open	Applications	Unable to get to my email	IT Team



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built-in reports

summary report list

Summary Reports:

- Summary of Contract Time by Organization
- Summary of Contracts Expiring by Organization
- Summary of Contract Overage Time by Organization
- Summary of Issues by Priority
- Summary of Issues by Priority (Day)
- Summary of Issues by Priority (Month)
- Summary of Issues by Assigned To
- Summary of Issues by Inactive User
- Summary of Issues by Issue Subtype
- Summary of Issues by Issue Type
- Summary of Issues by Organization
- Summary of Issues by Submitter (Caller)
- Summary of Issues by Support Rep
- Summary of Labor Hours by Organization
- Summary of Labor Hours by User
- Summary of Total Time Open by Organization
- Summary of Total Time Open by User

summary results

Issues by Issue Type - Results

Back

Issues by Issue Type

Recorded From 01-Jan-2016 To 31-Dec-2016

Issue Type	Opened Before	Opened	Closed	Left Open On
	01-Jan-2016	In Period	In Period	31-Dec-2016
Applications	0	134	121	13
Hardware	0	89	81	8
Network	0	45	41	4
Service Request	0	89	80	9
Software Access Request	0	89	81	8

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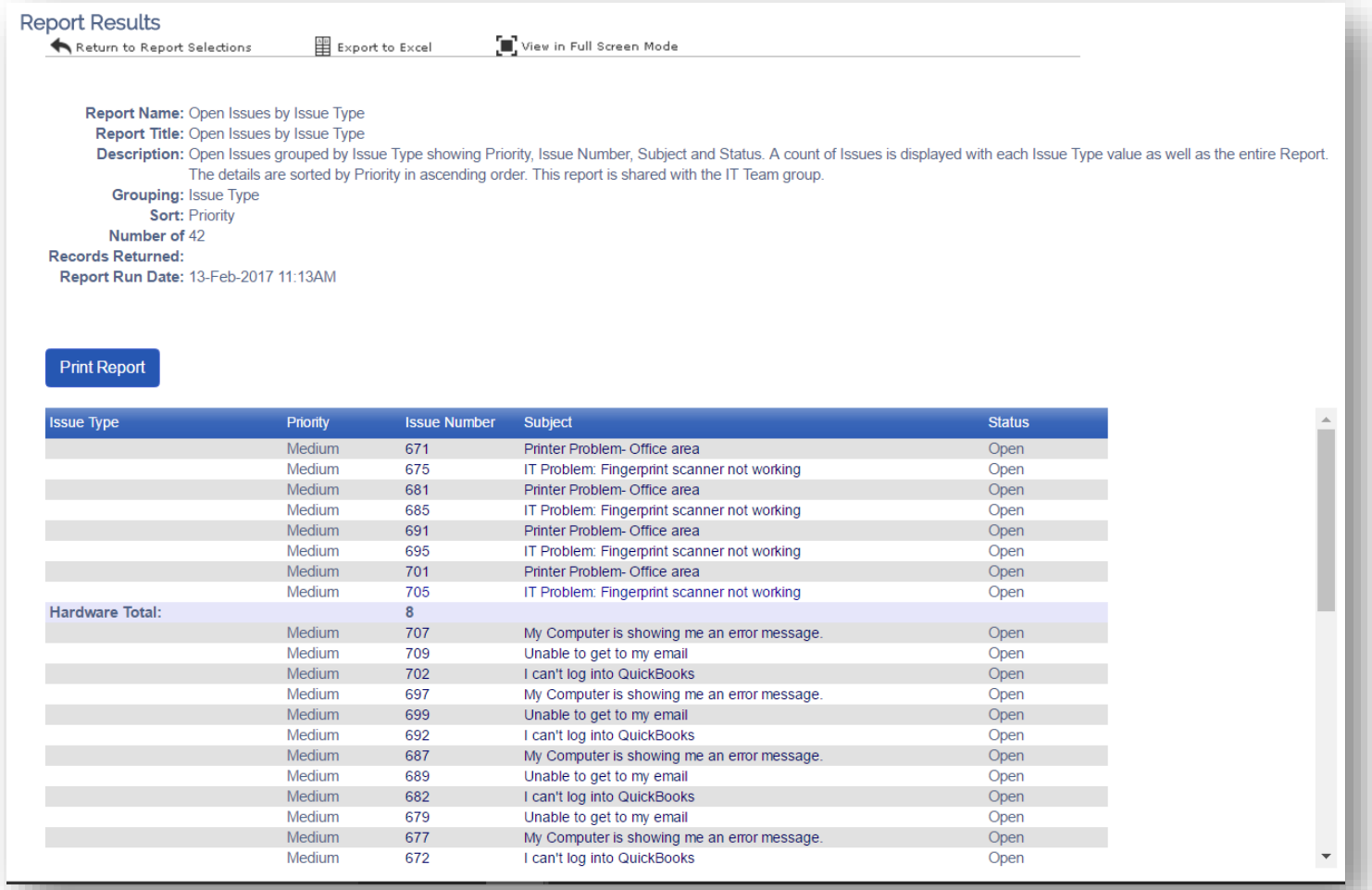

Issue Type	Priority	Issue Number	Subject	Status
	Medium	671	Printer Problem- Office area	Open
	Medium	675	IT Problem: Fingerprint scanner not working	Open
	Medium	681	Printer Problem- Office area	Open
	Medium	685	IT Problem: Fingerprint scanner not working	Open
	Medium	691	Printer Problem- Office area	Open
	Medium	695	IT Problem: Fingerprint scanner not working	Open
	Medium	701	Printer Problem- Office area	Open
	Medium	705	IT Problem: Fingerprint scanner not working	Open
Hardware Total:		8		
	Medium	707	My Computer is showing me an error message.	Open
	Medium	709	Unable to get to my email	Open
	Medium	702	I can't log into QuickBooks	Open
	Medium	697	My Computer is showing me an error message.	Open
	Medium	699	Unable to get to my email	Open
	Medium	692	I can't log into QuickBooks	Open
	Medium	687	My Computer is showing me an error message.	Open
	Medium	689	Unable to get to my email	Open
	Medium	682	I can't log into QuickBooks	Open
	Medium	679	Unable to get to my email	Open
	Medium	677	My Computer is showing me an error message.	Open
	Medium	672	I can't log into QuickBooks	Open

report writer

use query and report builder

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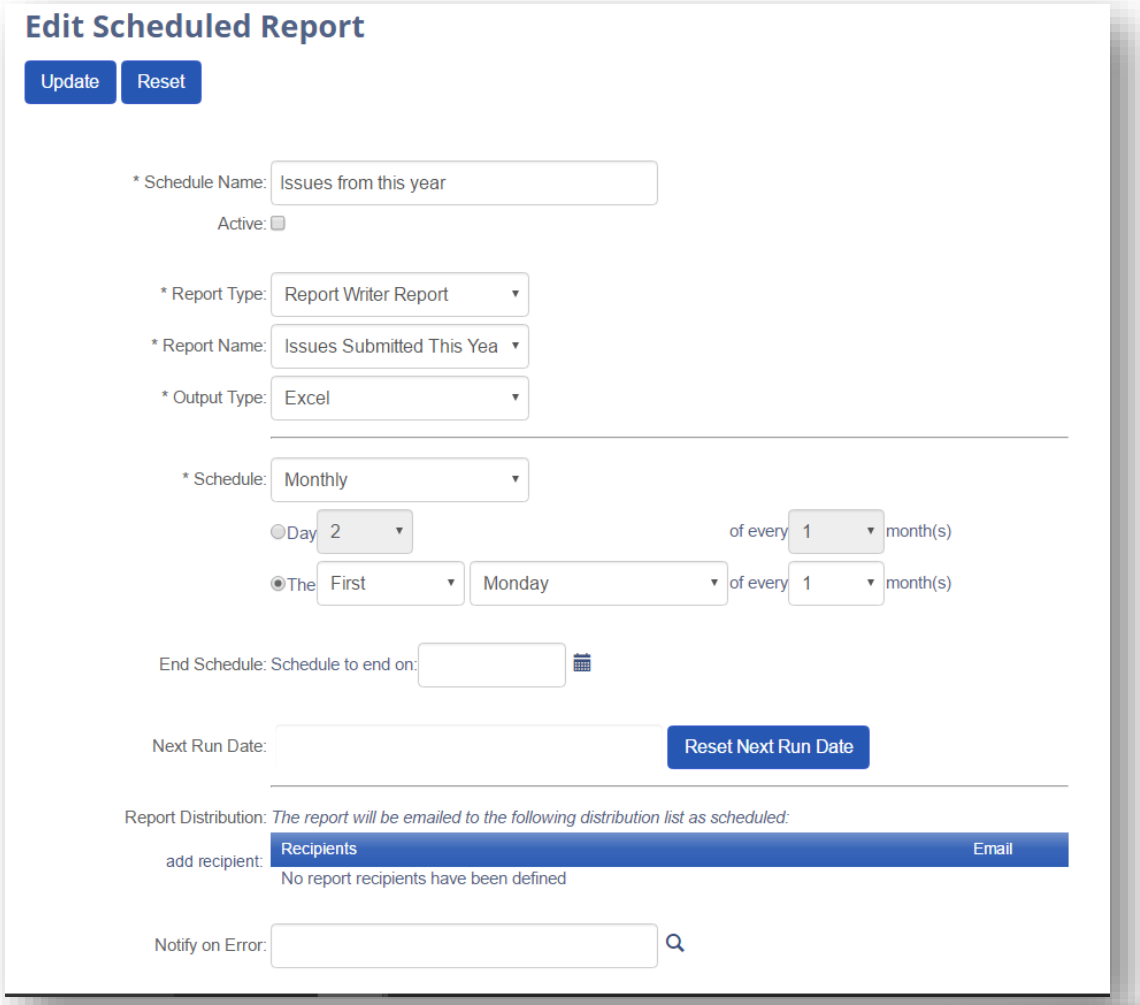

scheduled reports

automatic delivery by email

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add-ons

active directory

Running Microsoft Active Directory? Create, authenticate, & update users from one place with Active Directory integration.

asset management

Improve operational efficiency by tracking PC inventory, managing hardware & software information, & maintaining compliance.

billing

Invoice customers for products & services directly from Issuetrak. Manage work orders, personalize invoice templates, & more.

surveys

Easily generate online surveys, send them to a target audience, & then collect & analyze your results.

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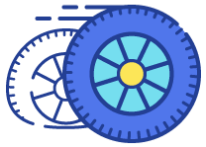
how is issuetrak used



customer support

Streamline your customer support operations, manage your team better, & ensure customer satisfaction.

complaint management

Manage complaints from start to resolution. Use web forms for easy submission. View open and escalated complaints in the dashboard.

issue tracking

Simplify how you resolve issues & boost productivity with software customized to your needs.

workflow

Powerful and versatile. Define, manage, & automate the processes that keep things running smoothly.