pure service ®

**Pureservice - User Manual (with Administrator)**
1 — Last update: Apr 03, 2023

Pureservice AS

# Table of Contents

# Agent Console

The Pureservice User Manual targets agents and administrators, and describes different aspects of working in the Agent Console.

# Our contact information

## Get in touch with our support-team!

You can contact our support-team by logging in to our Selfservice-portal and register your support needs. We will answer you soon!

[Log in to our Selfservice-portal](#)

You can also contact us at the following:

Tel: **22 12 00 26**

Email Address: **support@pureservice.com**

# Terminology

In this chapter, we will explain some of the terminology used throughout the User Manual. We recommend that you read this chapter, even if you are familiar with an older version of the service desk, or new to Pureservice.

## Roles

- **End user:** An end user can only access Selfservice
- **Agent:** An agent can access both Selfservice and the Agent Console
- **Administrator:** An administrator does not have any access restrictions, and can access both the Agent and Administrator Console, and Selfservice
- **Zoneadministrator:** A zoneadministrator has many of the same rights as an administrator, but limited to the individual zone of which they are a member of.

In some chapters, we talk about **users**. A user can be an end user, agent or administrator.

## Agent Console

In the Agent Console, agents, administrators and zoneadministrator can manage tickets, contacts, announcements posted in Selfservice, etc.

## Administrator Console

Only administrators and Zoneadministrator can access the Administrator Console. You can read about the Administrator Console in the manual: **Pureservice – User manual**.

## Ticket
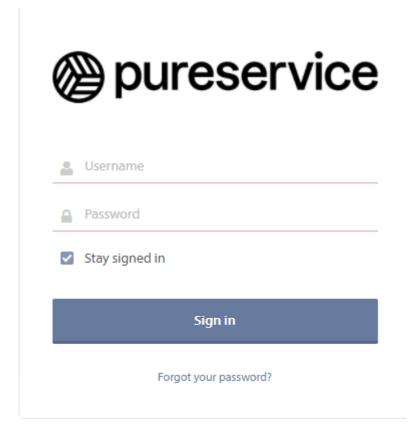
A ticket, formerly referred to as an incident in previous versions of Pureservice, is by default either an **incident**, a **problem**, or a **service request**.

## Change
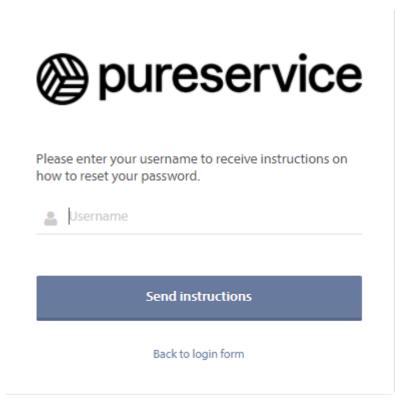
A **change request** is defined as a formal proposal for an adjustment to a product or a system. Pureservice offers a Change module where you can handle these types of requests.

# Login

You need a username and a password in order to log in. **Administrators** and **agents** can log in to the Agent Console, but **end users** can only log in to Selfservice.



If you cannot remember your password, please click "Forgot you password?".

Type your username and click "Send me instructions". You will receive an e-mail with instructions on how to reset your password.

# Console header

In the upper right corner, you will find this manual, notification center, tab history and account information.
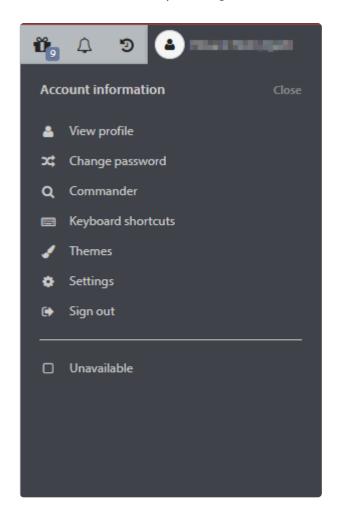
**The manual** is accessed by clicking the manual icon .

In the **Notification center** , you will see all your notifications. You open the case by clicking the notification.

**Tab history** shows your recent tabs.

By clicking your name, a drop-down menu opens where you can view your profile, change your password, sign out of Pureservice, set availability or change theme.

**View profile** opens your profile page.

**Change password** opens a modal window, where you can change the sign in password directly.

**Keyboard shortcuts** will present you a window showing all the shortcuts configured to work in Pureservice.
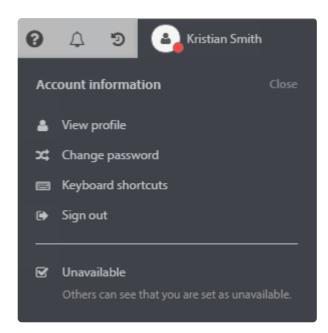
**Settings** various settings for your own Pureservice experience

Click **Sign out** to exit the service desk.
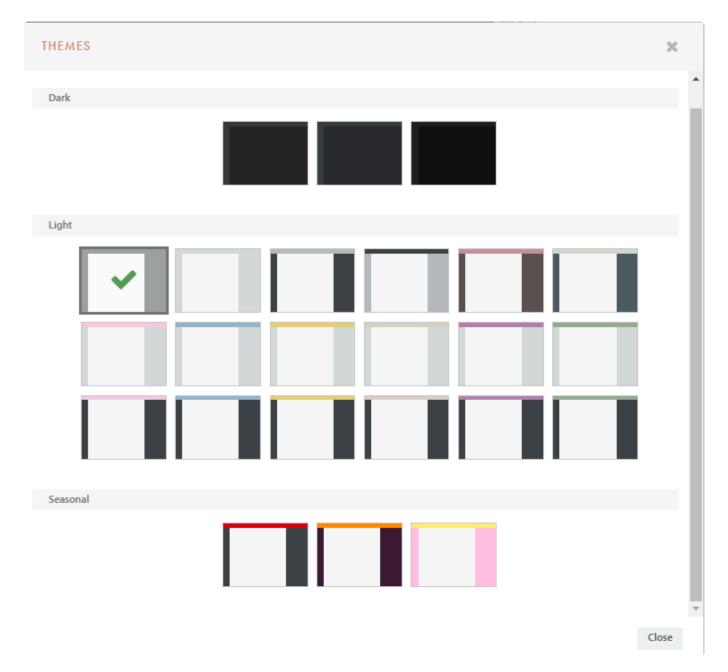
**Show seasonal themes** toggles if seasonal themes, such as Halloween or Christmas themes, should be available all year round.

Click **Unavailable** to put yourself to unavailable. In assignment and case assignment, it will show (unavailable) behind your name. In the workflow builder there are criterias and actions associated with this setting.

After you have clicked on **Unavailable** you will see a red dot next to your name.



Under **Themes** you can choose a color theme for Pureservice.

## THEMES

### Dark

### Light

### Seasonal

Close
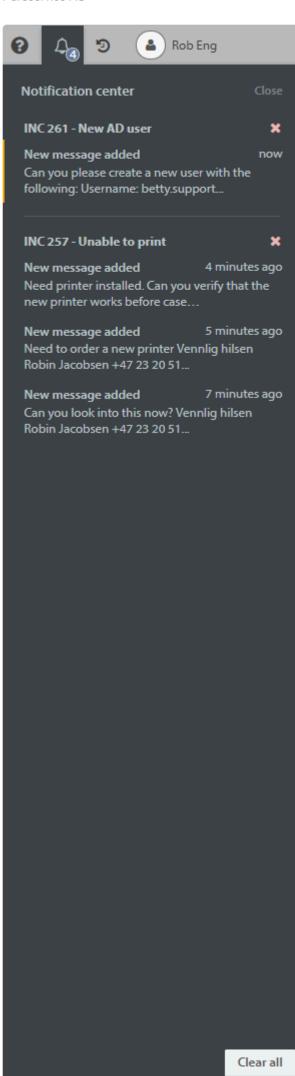
# Notifications

Notifications are used to receive updates about relevant actions concerning your tickets, and are listed in the notification center.

## Notification center

The notification center can be found in the top-right corner, below your name. It gives you a list of all notifications yet to be viewed or removed. Click on the **hailer icon** to open the center. To close the notification center, simply click on the icon again.

**Rob Eng**

## Notification center

Close

**INC 261 - New AD user** ✖

**New message added** now
Can you please create a new user with the
following: Username: betty.support...

**INC 257 - Unable to print** ✖

**New message added** 4 minutes ago
Need printer installed. Can you verify that the
new printer works before case…

**New message added** 5 minutes ago
Need to order a new printer Vennlig hilsen
Robin Jacobsen +47 23 20 51…

**New message added** 7 minutes ago
Can you look into this now? Vennlig hilsen
Robin Jacobsen +47 23 20 51…

Clear all

> ✱ The hailer icon disappears if the browser width is less then 1000 pixels, meaning that you cannot access or use the notification center.

# Groups

Pureservice sorts Notifications into groups, made up by a "parent" and "children". The ticket is the "parent", and notifications/actions regarding the ticket are the "children". Each group has a header, which contains the ticket number and subject. To remove or close the notification group, click close. If you click on a notification, Pureservice will open the ticket linked to it, and remove it from the notification list.

Each notification has a header that describes the action performed on the ticket, and how long ago it occured. New notifications are outlined with an orange left margin. The colour will disappear automatically after a few minutes.

# Toast
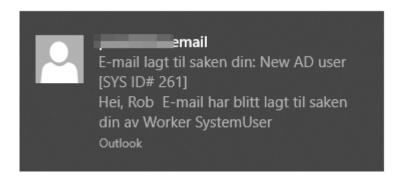
When the notification centre is closed, and an action is performed on one of your tickets, a **toast** pops up beneath the hailer icon.



The toast is timed and will disappear after a short while. Clicking on the toast will open the ticket linked to the notification.

# Desktop notification

You can also receive toasts as desktop notifications. Pureservice will prompt you about enabling desktop notifications the first time.

# Triggers and conditions
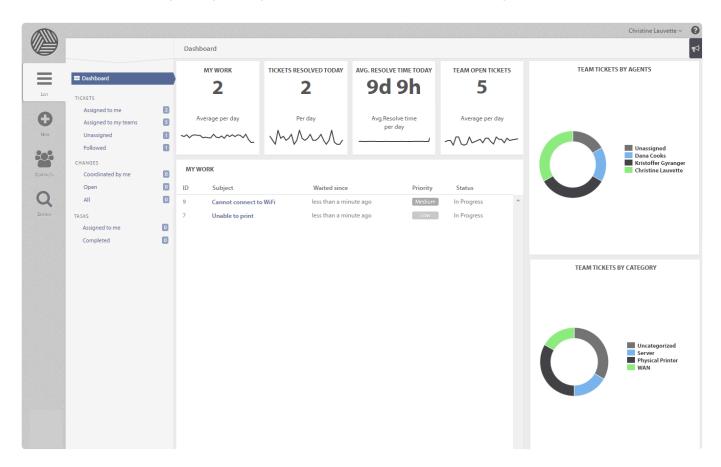
Triggers and conditions define which actions generate notifications. Administrators can turn off notifications for agents. Here are some of the default triggers which generate notifications:

- Communication is added
- A ticket is re-assigned
- A new ticket is assigned
- Priority is changed
- Attachment is added to a ticket

# List view

When you log in for the first time, Pureservice redirects you to your personal dashboard in the list view. The list view is a synopsis of all Tickets in Pureservice. If the Change module is installed, you will also be able to see Changes and Tasks in the list view.

You can access the lists anytime by clicking on the "List" button or the Pureservice logo.
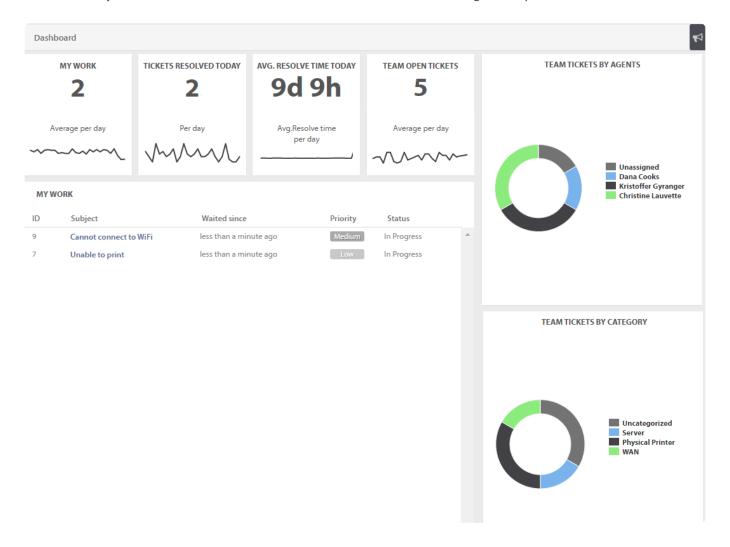


✳ Pureservice only redirects you to your personal dashboard the very *first time* you log in. After the first sign in, Pureservice remembers the most recent viewed list when you log out. When you log in again, Pureservice will redirect you to *that* list.

## Infinite scroll

If a list contains many elements, Pureservice will only load a collection of them by default. If you want to load more elements, simply scroll to the bottom of the list. This is a performance enhancing technique, which results in responsive lists and improved user experience.

# Dashboard

Trend graphs, donut charts and a prioritized work list make up the personal dashboard. The dashboard is updated and refreshed every minute. Each element will be discussed in detail in the following subchapters.

# Trend graphs

There are four different trend graphs in the dashboard.



The graphs represent data, calculated by HOP, from the previous 30 days. Simply hover over the graph to see each entry's date and average.

**HOP**

HOP stands for Hours of Operation, and is (at the time) not configurable. Hours of Operation is currently set to 08:00 – 16:00 on weekdays *only*. Saturdays and Sundays are not included in the HOP. Data for the trend graphs is saved every hour in the HOP time span, and is used to calculate an average per day.

## My work

The number in the My Work box indicates how many tickets that are currently assigned to you, with one of the following core statuses: "New", "Assigned", "Open" or "Pending". It also corresponds to the number of tickets in the **My Work** list below. Each entry in the graph shows an average of tickets assigned to you daily.

## Tickets resolved today

The number in the second box, Tickets Resolved Today, corresponds to the number of tickets you have personally resolved during the day. Each entry displays the average resolve time per day.

## Avg. resolve time today
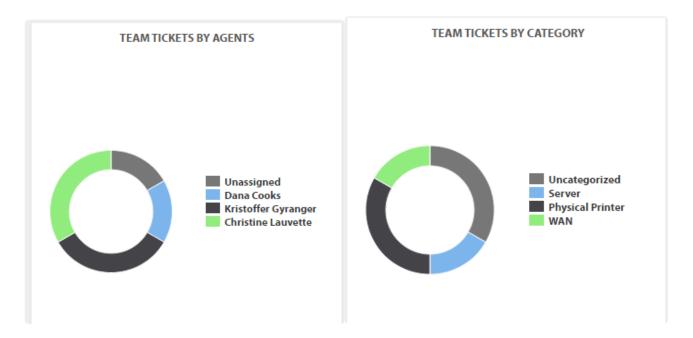
This graph will not vary as much as the other ones, due to the fact that each entry in the graph represents an average of the resolve time from the last 30 days. The number above the graph represents your personal average ticket resolve time for the current day.

## Team open tickets

Open tickets are tickets with one of the following core statuses: "New", "Assigned", "Open" or "Pending". The number and graph represent an average of all open tickets that belong to the team(s) of the logged in user, the current day.

# Donut charts

There are two different donut charts:



## Team Tickets By Agents

The By Agents chart displays the number of tickets per agent in the team(s) of the logged in user.

## Team Tickets By Category

The By Category chart displays the number of tickets per category in the team(s) of the logged in user.

# Prioritized work list

My Work list is a prioritized list of all personal tickets with the core statuses "New", "Assigned", "Open" or "Pending".

**MY WORK**

| ID | Subject | Waited since | Priority | Status |
|----|---------|--------------|----------|--------|
| 9 | Cannot connect to WiFi | less than a minute ago | Medium | In Progress |
| 7 | Unable to print | less than a minute ago | Low | In Progress |

Tickets in the list are sorted by **Priority**, followed by **Waited since**. The latter is a clock that starts or stops depending on a ticket's status, and shows agents how long a customer has been waiting for a response. The clock is running if a ticket is set to one of the following core statuses: "New", "Assigned", "Open" or "Pending". If a ticket's status is set to "Pending – Customer", "Resolved" or "Closed", the clock stops and the ticket is removed from My Work.

# Tickets

When working in a service desk, tickets will accumulate. To organize this, Pureservice uses a set of predefined lists to separate tickets into groups. Sorting the tickets into different lists will make the workload easier to handle. In addition, you can create your own lists by clicking on the filter icon ![filter icon] in the upper right corner. You can read more about the ticket filter in the subchapter List functions – Ticket filter.
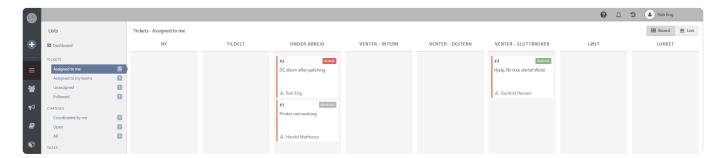


## Board view

You can choose to display the changes in a list view or a board view, by pressing ![Board List toggle]. The latter presents registered changes and statuses in a straightforward and lucid way. It is not possible to filter changes once you have opened the board view, unlike the list view. In order to filter changes, you have to choose a list while you are still in the list view, and optionally make changes to the filter, before you enter the board view.

For the time being, it is not possible to move the changes in the board, you can only look at them. This makes the board particularly valuable in planning meetings, where it is important to have an overview of the statuses.



## Register new ticket on behalf of a user

It's possible to register new tickets on behalf of other, existing users. If a user forwards an email from his or her personal inbox to Pureservice with certain tokens, Pureservice will register the ticket with the user specified in the tokens.

You can add the following tokens in the subject field:

- [email:test@pureservice.local]
- [username:testuser]

You may use several tokens in the email subject, but Pureservice will always use the first one to identify the user. If no result is found, Pureservice will create a new ticket using the sender's email address.
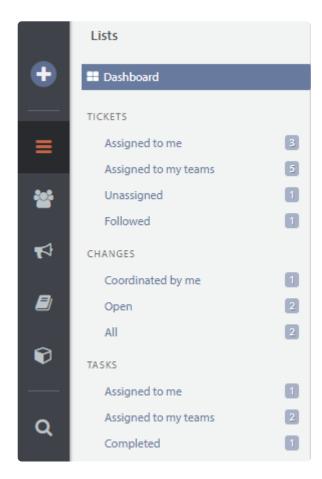
✳ Please note that the email address and username above are just examples.

# List menu

Tickets are sorted into predefined lists in the list menu:

- **Assigned to me**: open tickets assigned to you personally
- **Assigned to my teams**: open tickets assigned to the team(s) you are a member of
- **Unassigned**: all unassigned tickets registered in Pureservice
- **Followed**: tickets you follow



Pay attention to the number to the right of every list heading, as it indicates how many tickets there are in the list.

In addition to these ticket lists, you can access your personal **dashboard** from the list menu.

## Creating a new list

Any set of filters can be saved as a new List by using the *Save As* button. Any agents can make new personal lists, however administrators have a few more options as to who can access the new list. **Personal** means that only the administrator sees the list. **Global** means that list will be added to every agent. You can also select a specific **team** to access the newly created list.

Personal                                 ⌄

Personal

Global

Administratorer

Technical Support
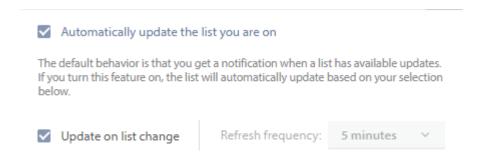
# List function

The ticket lists have several important functions: customizable list view, resizable columns, column sorting, indications of unsaved changes, download list (as CSV file), filters to create custom lists, marking tickets for deletion, and assigning to oneself. All of the functions are discussed in the following subchapters. Elements in tickets lists are automatically updated if modified by someone else.

| Tickets - Assigned to me (global list) | Agent ✕ | Status ✕ | | | | | | |
|---|---|---|---|---|---|---|---|---|
| ID ▾ | Subject | Category | Company | Name | Priority | Owner | Status | |
| 36 | DC down after patching | Server › Downtime | Printed Press | Jane Austin | Høy | Kåre Robinsen | Under arbeid |
| 7 | Help, I can't get Word to… | Software › Licence | Insurance inc | Harold Matthews | Normal | Kåre Robinsen | Under arbeid |
| 1 | Printer doesn't work | Office › Printer | Integrate IT | Paul Johnson | Normal | Kåre Robinsen | Under arbeid |

## Auto refresh

The ⚙ icon will let access the auto refresh options. When activated you have the option between refreshing at set intervals, or whenever there is a change to the list

☑ Automatically update the list you are on

The default behavior is that you get a notification when a list has available updates. If you turn this feature on, the list will automatically update based on your selection below.

☑ Update on list change | Refresh frequency: 5 minutes ⌄

## Customizable list view

You can customize the list view by choosing which columns you want to see. The column menu appears when you right click on a column header.

☑ ✏

☑ ID

☑ Subject

☑ Category

☐ Type

☑ Name

☑ Company

☐ Email
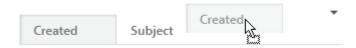
> ✳ The fields **Name**, **Address**, **City** and **Country** "belong" to the end user who reported the ticket, not the agent or administrator who registered it. The fields **Address**, **City** and **Country** make it possible to create filters and custom lists based on where the end users are located.

# Resizable columns

To move a column, drag an drop the column.
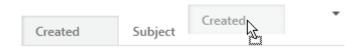
To resize a column, simply drag the column to the desired length.

# Column sorting

To move a column, drag an drop the column.

To resize a column, simply drag the column to the desired width.

# Unsaved changes

The pencil icon ✏, in the leftmost column, indicates if a ticket has any unsaved changes. In addition, parts of the row, such as **Company**, **Status** and **Created** are highlighted.

| ID | | Subject | Category | Company | Name | Priority | Owner | Status |
|----|---|---------|----------|---------|------|----------|-------|--------|
| 36 | | DC down after patching | Server › Downtime | Printed Press | Jane Austin | Høy | Kåre Robinsen | Under arbeid |
| 7 | | Help, I can't get Word to… | Software › Licence | Insurance inc | Harold Matthews | Normal | Kåre Robinsen | Under arbeid |
| 1 | | Printer doesn't work | Office › Printer | Integrate IT | Paul Johnson | Normal | Kåre Robinsen | Under arbeid |

Tickets - Assigned to me (global list)  Agent ✕  Status ✕

# Download ticket list

You can download the list you are currently viewing or working on, by clicking  in the upper right corner. The list will be downloaded as a CSV file, and can be opened by programs such as Microsoft Excel. All columns are included in the downloaded file, even the ones that are hidden in the Agent Console.

# Delete ticket

Agents can mark tickets for deletion to show the administrators that the marked ticket can be deleted. Agents cannot delete the ticket themselves, as this require access to the admin console.
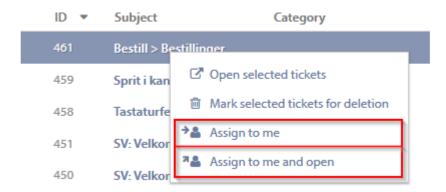
To mark a ticket for deletion you need to right click one or more tickets in the list and chose **Mark selected tickets for deletion**



# Assign to me

Agents and administrators can assign tickets to themselves directly from the list view.
This is done by selecting one or more tickets, rightclicking, and selecting "Assign to me" or "Assign to me and open".
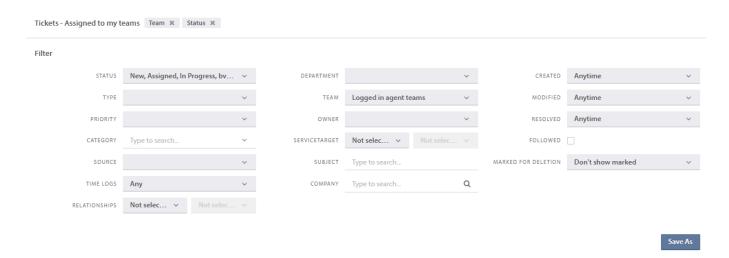
# Ticket filter

Pureservice comes with a set of predefined ticket lists (assigned to me, assigned to my teams, unassigned and followed). Each list has a default filter applied to its record set. You can create your own custom filters and lists, or temporarily edit the default ones. Click  to open the filter menu. To close the menu, click on the filter button again.
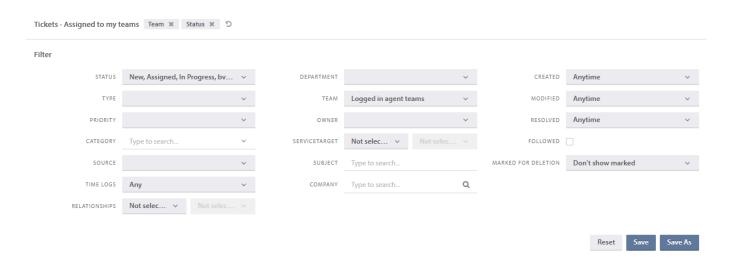


Pureservice lets you filter tickets based on **status**, **type**, **priority**, **category**, **source**, **time logs**, **relationships**, **department**, **team**, **owner**, **service target**, **subject**, **company**, **created**, **modified**, **resolved**, **followed**, **with location** and **marked for deletion**.

## Edit a default filter
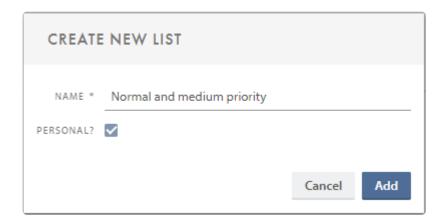
Each default filter comes with a set of predefined values. Simply click on the drop-down lists to select the options (one or multiple) that are best suited for your list.
Once you have made changes to a default filter, a "Reset" button appears to the left of the "Save As" button. Click on the "Reset" button to undo changes (or click the reset-icon  near the top of the page)

Changes made to a default filter are only temporary. To save the changes, you have to create a new list.

# Create a new list
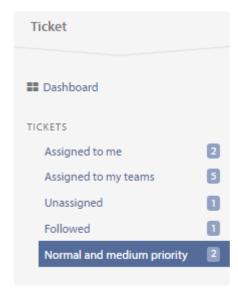
To create a custom-made list, select an existing list as a baseline for the new one and open the filter menu. You can either make changes to the chosen filter before saving it as a list, or edit the list after it has been created. Clicking "Save as" will open a modal window where you can enter a unique list name, and create the list. By default **Personal?** is chosen. If this box is unckecked, the list will become shared, and all agents will see it in their menu.
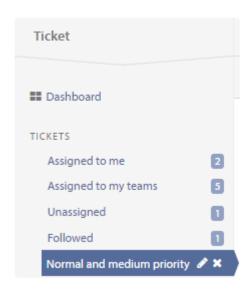


Press "Add" to create the list.



# Edit and delete an existing list
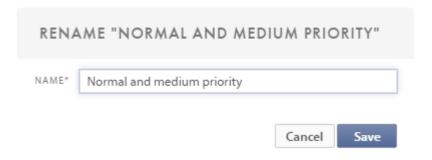
It is possible to edit both the filter values of a list and its name. You can also delete a list.
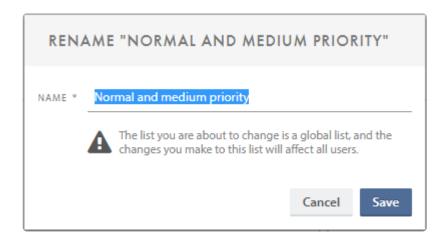
When you hover over a list, two new icons (a pencil and a cross) appear to the right of its name.

To edit the list name, click on the pencil. Doing so will open a modal window, where you can rename the list.
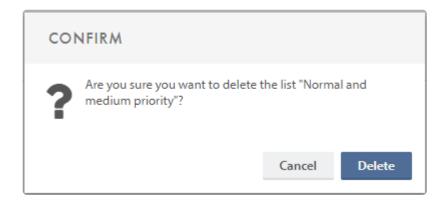


If the list is shared, you will see a warning that the change will affect all user.
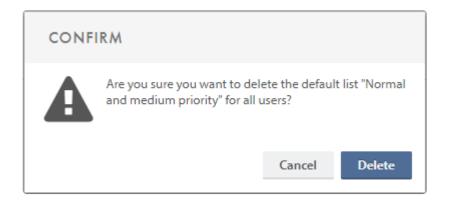


To delete a list, click on the cross. You will have to confirm your choice in order to delete the chosen list.
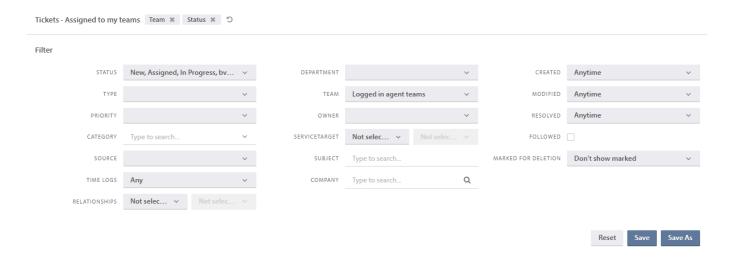
If the list is personal you will see this warning message.

When trying to delete a shared list, you will see this message instead, warning you that the list will be deleted for all users.
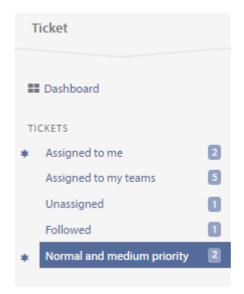


In order to make changes to filter values, simply click on the custom-made list you want to edit. Make sure that the filter menu is open. Once you have made changes to the filter, you can choose to **reset** it, **save** and overwrite the existing list or **save as** a new list.



# Unsaved changes

Changes made to a filter, belonging to either a default or a personal list, are stored in your browsers local storage until you save them. A star is displayed next to the list to indicate that the list has unsaved changes.

Ticket

■■ Dashboard

TICKETS

✳ Assigned to me                    2

Assigned to my teams                5

Unassigned                          1

Followed                            1

✳ Normal and medium priority        2

# Board and map view
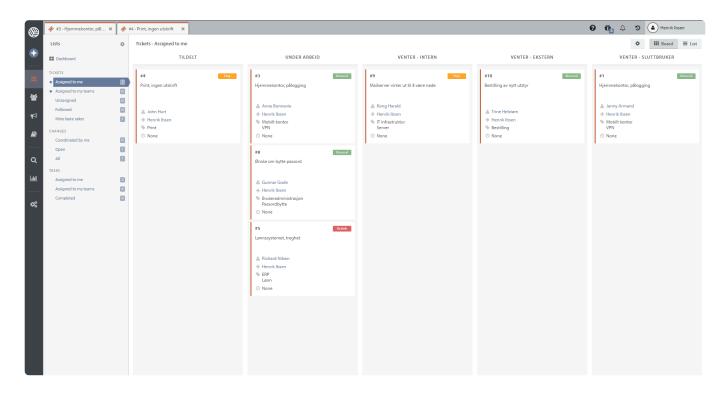
## Board view

> ✳ This Feature must be enabled by an Administrator before it can be used!
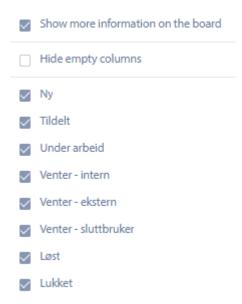
You can choose between two (three if you have the Selfservice Location-module) views when looking at the Tickets overview; **List** view which is the default setting and **Board** view.

You can freely switch between which view you want in the top right corner when looking at a list of tickets, directly below your name and profile image. This setting is personal and will not affect other Agents and Administrators.
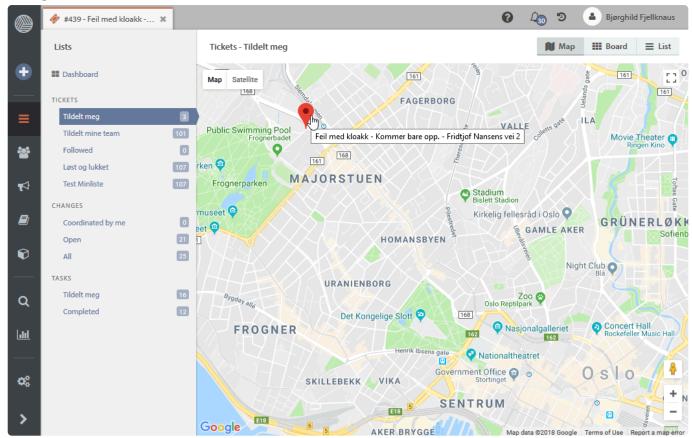


As you can see above, it is very easy to get an overview of what status each Ticket currently have in this view, along with some nice-to-have information.

Clicking the settings button ⚙ in the board view, you will have the opportunity to show more information on the board, hide empty columns that have no tickets on them and check which status you want to see on the board. The choice to show more information on the board will make visible the agent/ team the ticket is set on, the category of the ticket and the ticket service targets.

- ☑ Show more information on the board

- ☐ Hide empty columns

- ☑ Ny

- ☑ Tildelt

- ☑ Under arbeid

- ☑ Venter - intern

- ☑ Venter - ekstern

- ☑ Venter - sluttbruker

- ☑ Løst

- ☑ Lukket

# Map view



This view can be used together with the Selfservice Location and shows the location reported in the relevant tickets with red markers.

Clicking on a marker shows some basic information about the ticket and clicking on the extra information opens the ticket.
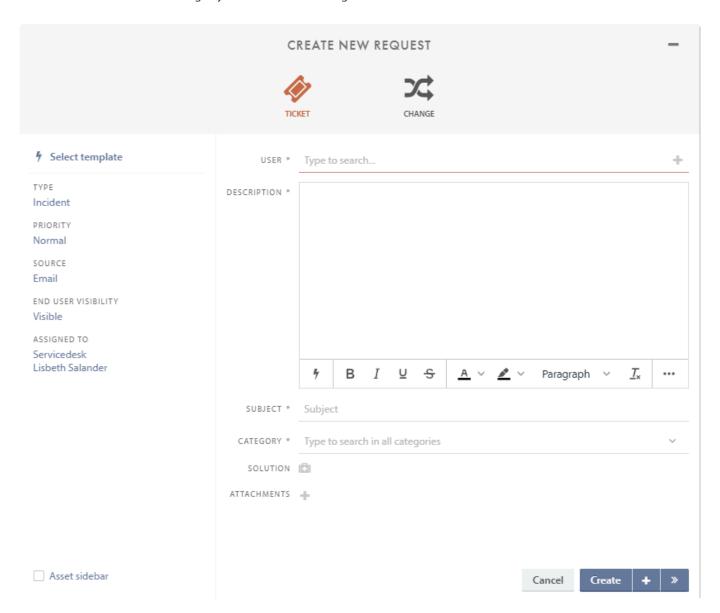
This requires the Selfservice Location features to be present and set up.

# Create a new ticket

Tickets are created in one of two ways: they are either generated automatically from the incoming channels, or created manually. To create a ticket manually, simply click on the "New" button in the leftmost menu.

Clicking on the "New" button opens a modal window, where you can fill in the information needed to create a ticket

The modal window will look slightly different if the Change module is installed.



The *create* button offers three alternatives:

Creates a new ticket, then returns you to the window you previously used.

Creates a new ticket, then reopens the *Create new request* window to create another ticket.
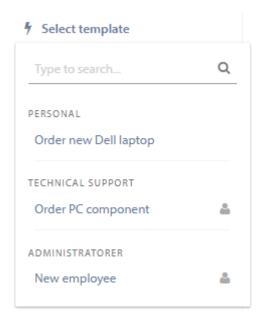
Creates a new ticket, then opens up the newly created ticket.

The Asset sidebar opens an extension to this windows, that will allow to you relate existing assets to this new ticket.

You can select from the assets already related to the end user, or search in other assets.

# Select template

When you create a new ticket in Pureservice, you can choose to fill out the request form by selecting a template. Working with templates might help speed up the registration process, as it fills out fields in the form for you. Press the template button to see which templates you can select.
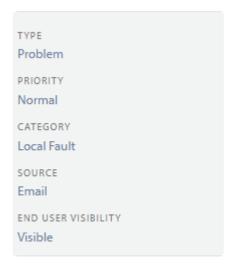


The templates are listed in the following order:

- Personal templates
- Templates from your default team
- Templates from other teams that you are a member of

The solution, status and attachments are added at the bottom of the form if you choose a template that contains these elements. You may edit the solution, but the status field and attachments are read-only.

# Classification sidebar

The fields in the left sidebar are automatically populated with default values.

TYPE
Problem

PRIORITY
Normal

CATEGORY
Local Fault

SOURCE
Email

END USER VISIBILITY
Visible

**Type**, **Priority**, **Source** and **Assigned To** are all drop-down menus. If the default values do not apply for the ticket you are creating, you can easily change them.

The last option in the sidebar, the **Enduser visibility**, is a menu with three choices: **"Visible"**, **"Not visible"** and **"Visible without receipt-/solution e-mails"**:
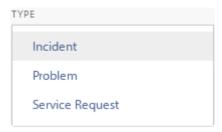
- **Visible** – The ticket is visible for the end user on Selfservice
- **Not visible** – The ticket is not visible on Selfservice
- **Visible without receipt-/solution e-mails** – The ticket is visible on Selfservice. but the end user will not receive receipt or solution e-mails from Pureservice

> ✳ Administrators can add, remove and edit values for type, priority and source. The values displayed here are only default values, and may differ from the values in your own Pureservice solution.

# Type

Pureservice comes with a set of three predefined types: **incident**, **problem** and **service request**. When you create a new ticket manually, the type is by default set to incident.

TYPE

Incident

Problem

Service Request

# Priority

Pureservice offers five predefined priorities: **critical**, **high**, **medium**, **low** and **unknown**. The default priority for a new

ticket created manually is medium.

## Source

Pureservice also offers a predefined set of sources: **e-mail**, **phone** and **web**. The default source for a new ticket is phone.
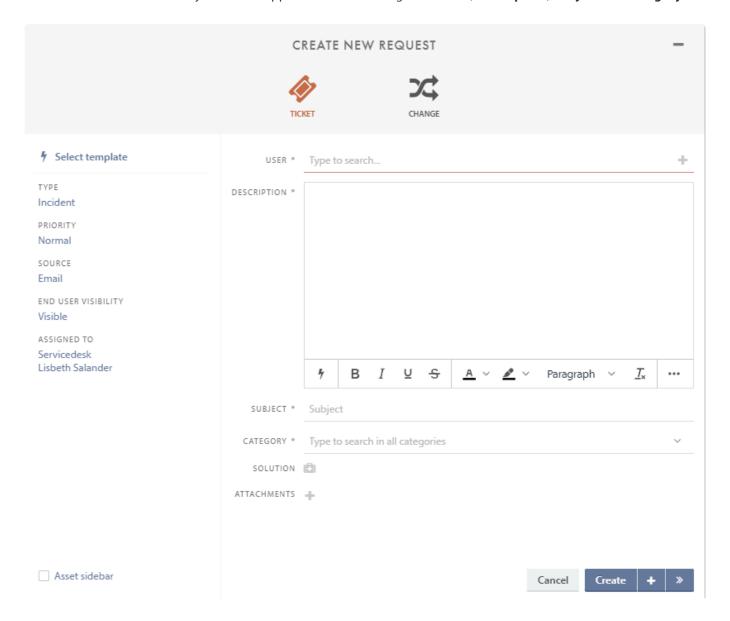
## Assigned to

The **Assigned To** menu contains all the teams and agents that your departments are allowed to see. You can choose team and agent by clicking on them, or by performing a search. If an agent is set to unavailable this will show.

# Ticket details

As mentioned in the previous chapter, [Classification sidebar](#), some fields are automatically populated, while agents have to fill out others manually. The latter applies for the following fields: **User**, **Description**, **Subject** and **Category**.



The three first fields are **mandatory**, meaning that you have to fill them out in order to create a ticket. Pureservice will mark mandatory fields that are empty with an exclamation mark and a warning message:



### Create or cancel
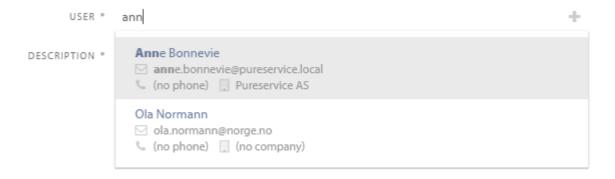
Clicking the "Create" button saves the ticket. Clicking the arrow  next to the "Create" button saves and opens the ticket, so that you can continue to work on it. Clicking the "Cancel" button closes the "Create new ticket" window. Content entered will be lost when cancelling the registration.

# User

You can either search for an existing user, or create a new one.
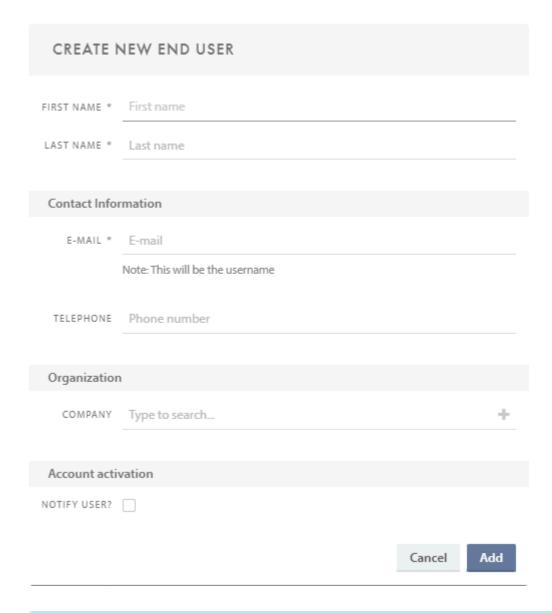
## Existing user

You can search for an existing user, for example by name, email, company name or phone number.



## New user

Clicking the "+" in the user search bar opens a new modal window where you can enter the necessary contact information to create a new user.

**CREATE NEW END USER**

FIRST NAME *      First name

LAST NAME *      Last name

Contact Information

E-MAIL *      E-mail

Note: This will be the username

TELEPHONE      Phone number

Organization

COMPANY      Type to search...                                              +

Account activation

NOTIFY USER?      ☐

Cancel      **Add**
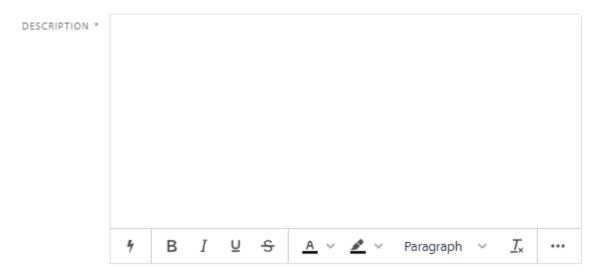
✳ Please note that the email will be set as the username, and that you can choose to notify the user about the newly created Pureservice account.

# Description
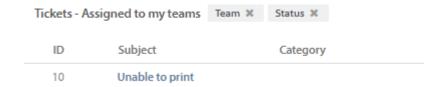
Fill in a suitable **description** of the ticket.

DESCRIPTION *

# Subject
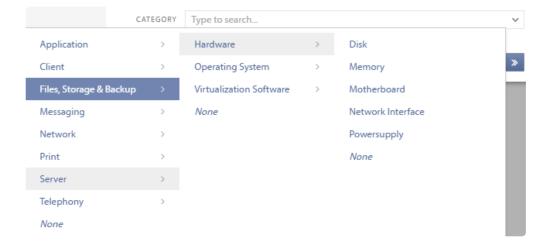
SUBJECT *    Unable to print

The content in the subject field is the same as in the subject column in the ticket list, and is supposed to give a short summary of the description.

Tickets - Assigned to my teams    Team ✖    Status ✖

| ID | Subject | Category |
|----|---------|----------|
| 10 | Unable to print | |

# Category

You can select a category in one of two ways: either by choosing one from the drop-down menu, or by searching for the category name. Setting a category is *not mandatory* in order to create a ticket.

CATEGORY    Type to search...

| Application | > | Hardware | > | Disk |
| Client | > | Operating System | > | Memory |
| Files, Storage & Backup | > | Virtualization Software | > | Motherboard |
| Messaging | > | None | | Network Interface |
| Network | > | | | Powersupply |
| Print | > | | | None |
| Server | > | | | |
| Telephony | > | | | |
| None | | | | |
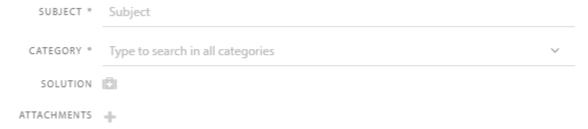
# Attachment
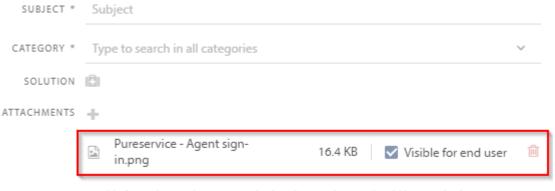
> ✳  The max file size for attachments uploaded directly to Pureservice is 10MB and you will get an error message specifying this if you attempt to upload larger files.

You can chose to add an attachment when creating a new ticket manually:

| | |
|---|---|
| SUBJECT * | Subject |
| CATEGORY * | Type to search in all categories ⌄ |
| SOLUTION | 🗂 |
| ATTACHMENTS | ➕ |

After adding the attachment, you can change the visibility of the attachment. Remove the tick if the attachment should not be visible to the end user.

| | |
|---|---|
| SUBJECT * | Subject |
| CATEGORY * | Type to search in all categories ⌄ |
| SOLUTION | 🗂 |
| ATTACHMENTS | ➕ |

Pureservice - Agent sign-in.png      16.4 KB   ☑ Visible for end user   🗑
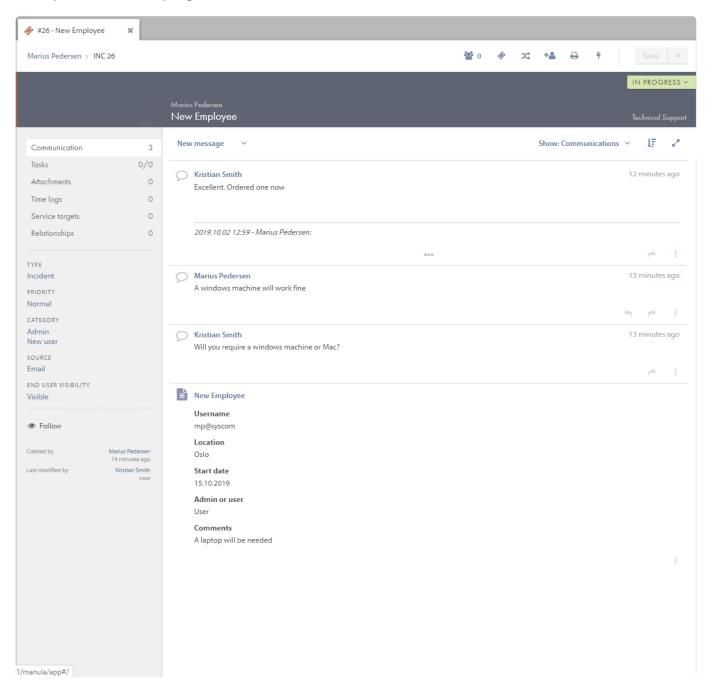
"Visible for end user" determines whether the attachment should be attached to any receipt-/solution e-mail to end user when creating this ticket.

# Working with a ticket
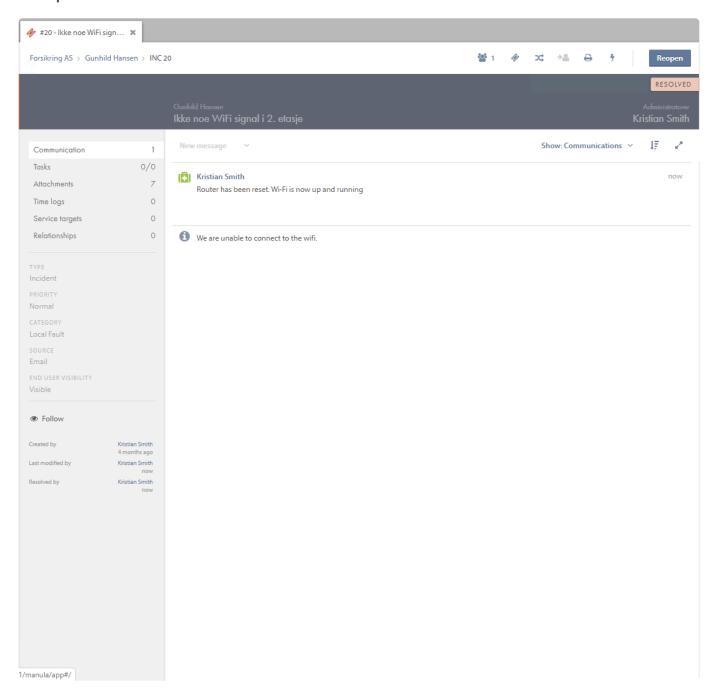
The ticket page is divided into three sections:

- Header
- Sidebar
- Center content

**Example of a ticket in progress:**

**Example of a resolved ticket:**

# Header

The header consists of two sections: an upper and a lower section.

## Upper section

The upper section contains information about the user who reported the ticket, which company he/she works for and the ticket id. To the right, you will find the **Recipients**, **Copy ticket**, **Create change**, **Assign ticket to me**, **Print ticket**, **Template** and **Save** buttons.

### Recipients

Click the ![icon] button to add more recipients to the case. Any email entered here will automatically be added to the CC field of any *New message*
**NB!** When a user is added to Recipients, the template *Send E-mail On Ticket Solved To End User and Ticket Recipients (CC)* is used instead when the ticket is solved.

### Copy ticket

Click the ![icon] to create a copy of the currently open ticket. You can change any information regarding the case before the copy is saved as a new ticket.

### Create change

Click the ![icon] button to create a new change based on the currently open ticket.

### Assign ticket to me

Click the ![icon] button to assign the ticket to yourself.

### Print
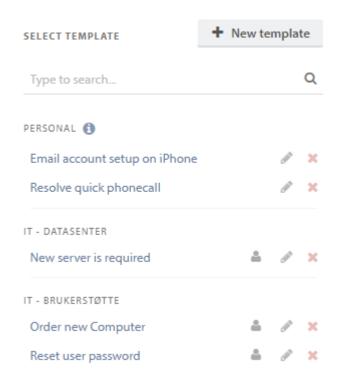
Click the ![icon] button to open the print menu.

**TICKET PRINT**                                              ✕

This print contains the ticket's subject and number, customer information
and ticket details. Tasks, attachments, time logs, related assets and
communication can be printed by selecting the options below.

Select all

☐  Tasks

☐  Attachments

☐  Time logs

☐  Related assets

☐  **Communication**  (Communications) ⌄

☐  Chronological order (oldest first)

What type of communication that is printed can be filtered by changing
options in the drop-down menu above. Selected filter on the ticket is
default. If the communication option above is not selected, only the ticket
description will be printed.

Cancel        Print
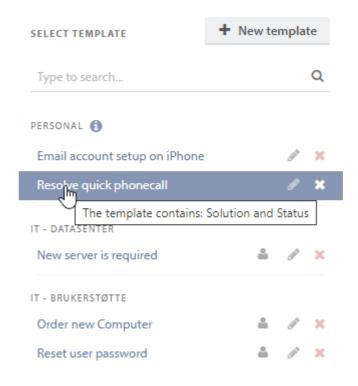
Here you select what will be included in the print: Tasks, Attachments, Time logs, Related assets and/or Communication.
If Communication selected, you can further specify what type of communication will be included using the dropdown
menu: All, Communications, Communications (without internal notes), Solutions, Description or History. You may also
choose whether the communication should be shown in chronological order (oldest first).
When the selection is done, you finish by clicking "Print" and choosing which printer you want to use.

## Template
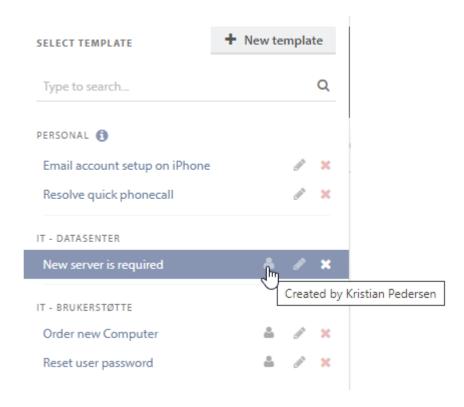
Press   ⚡   to open the template menu.

You can choose to either create a new template, or use/edit an existing one. Using a template will overwrite the ticket you are working on. If you cannot remember which fields are included in a template, simply hover over it.



If you need to know who created the template, hover over the the 👤 icon.

SELECT TEMPLATE                    **+ New template**

Type to search...                                    🔍

PERSONAL ⓘ

Email account setup on iPhone                ✎   ✖

Resolve quick phonecall                      ✎   ✖

IT - DATASENTER

New server is required              👤   ✎   ✖

Created by Kristian Pedersen

IT - BRUKERSTØTTE

Order new Computer                  👤   ✎   ✖

Reset user password                 👤   ✎   ✖
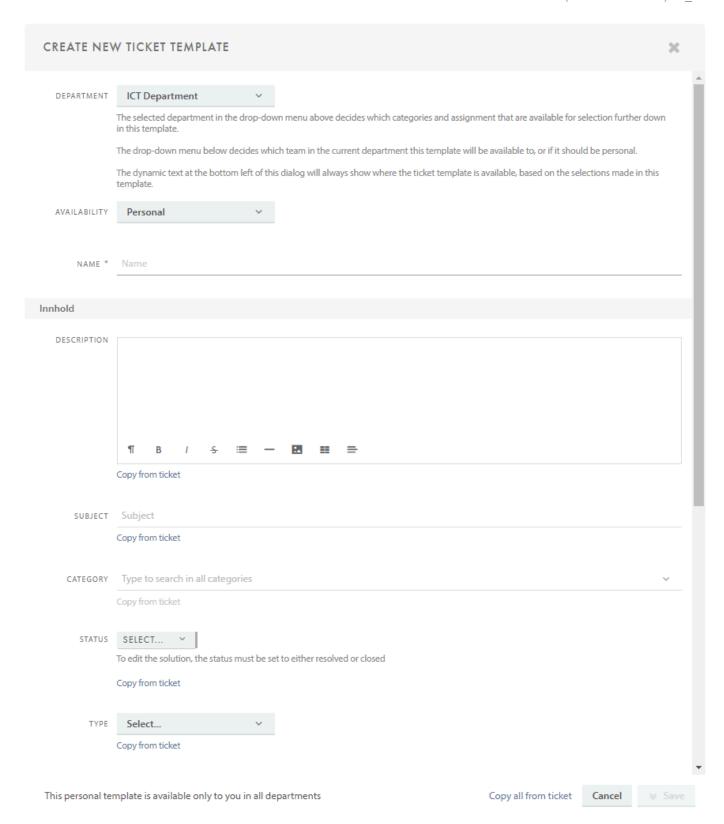
If you want to delete a ticket template, simply press ✖ .
If you want to edit an existing template, use the ✎ button.
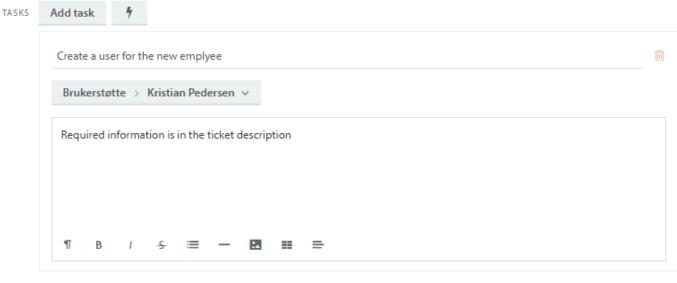
**Create new template**

In order to create a new template, you have to give it a name, decide what department it should be attached to and its availability. It can either be a personal template that only you can use, or you can make it available to a specific team in the selected department.

You then fill out the fields for the template. These are the values that will automatically be filled out in the ticket when the template is used. if the status is set to a _Resolved _ or _Closed _ status, an additional field will come up to fill in a solution.

## CREATE NEW TICKET TEMPLATE ✖

DEPARTMENT    ICT Department ⌄

The selected department in the drop-down menu above decides which categories and assignment that are available for selection further down in this template.

The drop-down menu below decides which team in the current department this template will be available to, or if it should be personal.

The dynamic text at the bottom left of this dialog will always show where the ticket template is available, based on the selections made in this template.

AVAILABILITY    Personal ⌄

NAME *    Name

### Innhold

DESCRIPTION

¶  B  I  S̶  ☰  —  🖼  ▦  ≡

Copy from ticket

SUBJECT    Subject

Copy from ticket

CATEGORY    Type to search in all categories    ⌄

Copy from ticket

STATUS    SELECT... ⌄

To edit the solution, the status must be set to either resolved or closed

Copy from ticket

TYPE    Select... ⌄

Copy from ticket

This personal template is available only to you in all departments      Copy all from ticket    Cancel    ⩒ Save

When creating a template you can add tasks that will automatically be added to the ticket. If the template is created from an existing ticket, you can copy all tasks from this ticket into the template.

TASKS  Add task  ⚡

Create a user for the new emplyee  🗑

Brukerstøtte  >  Kristian Pedersen  ⌄

Required information is in the ticket description

¶   B   I   S̶   ☰   —   🖼   ▦   ☰

Copy from ticket

You can also use *Task templates* to add a number of already prepared tasks to the ticket template

TASKS  Add task  ⚡

Summary *   SELECT TASK TEMPLATE      **+ New**

Unassigne       Type to search...                    🔍

Details        PERSONAL

               Todo with new customers          ✏  ✖

               BRUKERSTØTTE

               Follow up after incident      👤  ✏  ✖

## Save (and close)

When you make changes to a tickets, the save button is enabled **Save** ⌄ . Press **Save** to save the changes. To save and close the ticket tab, press ⌄ .

# Lower section

IN PROGRESS ⌄

Kundeservice resolve before   Christine Lauvette          Marketing
15h 59m (running)            Unable to print         Harold Mathews
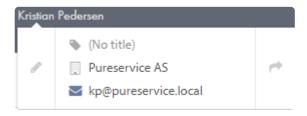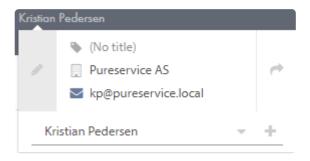
The lower section contains the name of the user who reported the ticket, the ticket subject, the status, and which agent and/or team the ticket is assigned to.

# Ticket reporter

If you click on the name of the user who reported the ticket, a small window with his/her contact information appears.

It is possible to switch ticket reporter. Simply do so by clicking on the pencil ✎ .
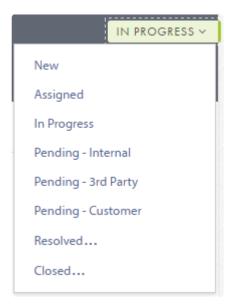
You can search for a user, find a user in the drop-down list or create a new user.

To open the users' profile page and make changes to his/her contact information, click on the arrow ↱ . You can read more about the user profile page in the next chapter: Contacts: User profile page.

# Status
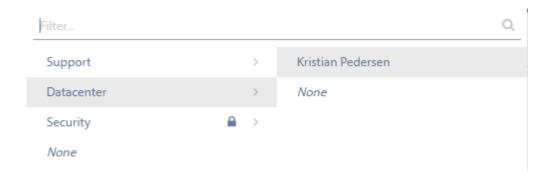
It is easy to change the status on a ticket. Simply click on the status field in the top-right corner, and a drop-down menu with available options will appear. Some of the options require a certain action before you can save. The status "Resolved…", for example, requires that you enter a solution before saving.

## Assigned agent/team
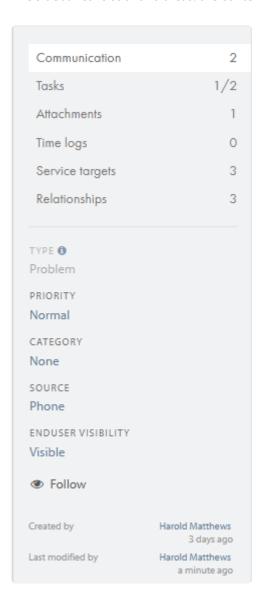
The field in the bottom-right corner shows which agent/team the ticket is assigned to. Clicking on this field opens a drop-down menu with a list of teams and agents that the ticket can be assigned to, depending on the assigned department. You can assign a ticket to a team or an agent by typing the name or by navigating through the menu. If an agent is set to unavailable this will show.
The padlock icon indicates that the team is set to private. You can assign a ticket to this team, but you will lose access to the ticket unless you are a member.

# Sidebar

The sidebar consist of two areas: the content menu at the top, and the ticket classification and information below.

| | |
|---|---|
| Communication | 2 |
| Tasks | 1/2 |
| Attachments | 1 |
| Time logs | 0 |
| Service targets | 3 |
| Relationships | 3 |

TYPE ⓘ
Problem

PRIORITY
Normal

CATEGORY
None

SOURCE
Phone

ENDUSER VISIBILITY
Visible

👁 Follow

| | | |
|---|---|---|
| Created by | Harold Matthews | 3 days ago |
| Last modified by | Harold Matthews | a minute ago |

## Content menu

The content menu changes the content displayed in the center of the ticket page. You can switch between **communication**, **tasks**, **attachments**, **time logs**, **service targets** and **relationships**. There is a number next to each option, which indicates the number of elements attached to that specific option.
Attempting to delete a task, time log or risk before they are saved initially will result in a popup asking for confirmation. Attempting to delete this *after* they've been saved will not, but the ticket/change must be saved before they are deleted which acts as form of confirmation.

## Ticket classifications and information

If necessary, you can make changes to the ticket classification here. **Type**, **priority**, **category**, **source** and **Visibility** all work as described in the previous chapter [Create a new ticket: Classification sidebar](). The visibility option can be useful in several scenarios, for example when:

- handling HR tickets within Pureservice
- an agent has reported a ticket and is working on it himself/herself
- the affected user doesn't need any feedback

If you follow a ticket, you will receive an email each time the _status _ changes.
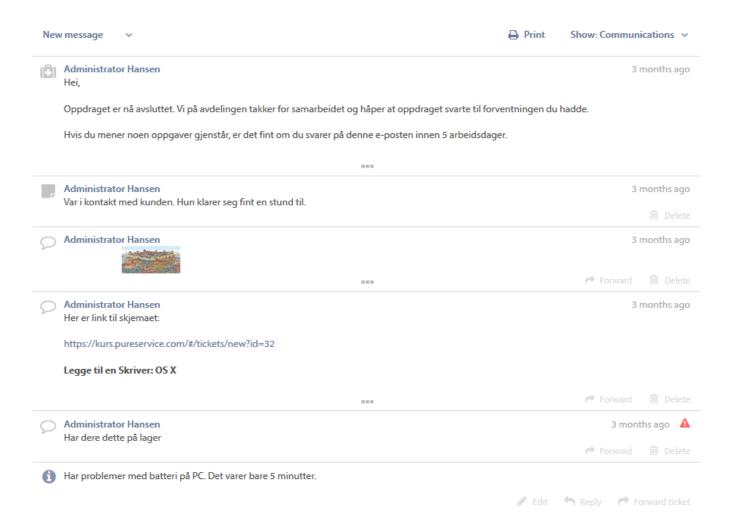
At the bottom of the sidebar, you will find information about when the ticket was created, modified, resolved and closed.

# Center content

As mentioned in the previous chapter, the content displayed in the center depends on the option chosen in the content menu (communication or attachments).
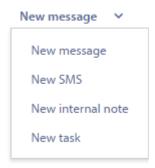
# Communication

Choosing the **communication** option in the content menu opens the ticket's communication feed. Here, you can read, create and delete communication entries. The entries are sorted descending, meaning that the most recent entry is on the top of the list. The communication feed is also updated automatically when new communication objects (message, internal note, sms) are added.
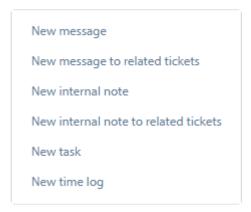


## Create communication entry
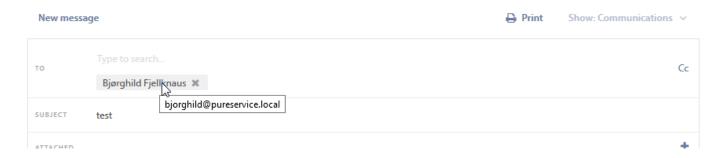
You can create a **New message**, **New SMS**, **New internal note** or **New task**. New message is set as default entry type, but you can easily choose to create one of the others instead. Simply click on the arrow next to 'New message', and select either of the choices you get.

If the ticket has related tickets, two more choices are available: **New message to reated tickets** and **New internal note to related tickets**. Using one of these will add the message or note to all related tickets.

New message

New message to related tickets

New internal note

New internal note to related tickets

New task

New time log

Hovering the pointer over a recipient of a message shows their email address.

New message                                        Print    Show: Communications ⌄

TO    Type to search...                                                      Cc

      Bjørghild Fjellknaus ✖

      bjorghild@pureservice.local

SUBJECT    test

ATTACHED                                                                       ✚

## Communication types
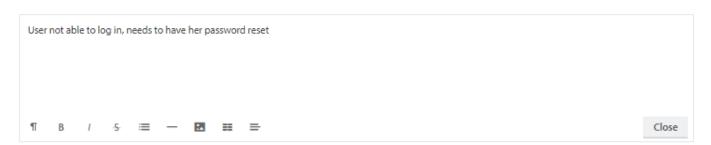
There are different types of entries in this feed: **description**, **internal note**, **message** and **SMS**. If a ticket is resolved or closed, there will also be a **solution** entry in the communication feed.

## Description

The description is marked with an information icon, and is the same as the content entered in the description field when the ticket was created.

The printer displays error message f302x

Click on the description entry or **Edit** ✏ if you need to make any changes to it.

User not able to log in, needs to have her password reset

¶   B   I   S   ≔   —   🖼   ▦   ☰                                    Close
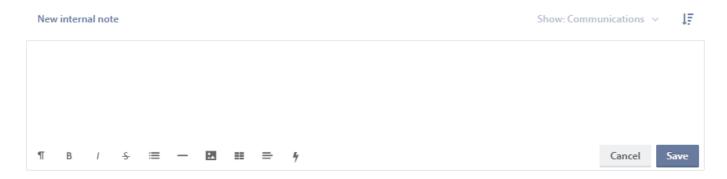
Click **Move description to top** ⬆ to set the description at the top of the communication feed. When at the top, click

again to set at the bottom of the feed. The icon is only visible if it is 2 or more elements in the feed.

Click **Forward ticket** ↱ to send the description in an email where you must define a new recipient.

Click **Reply** ↰ to send a reply to the end user with the description.

## Internal note
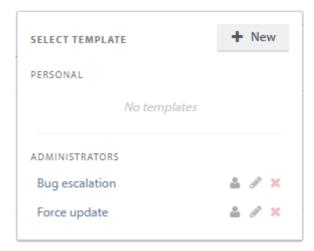


Internal note is marked with a notebook icon, and is a function that enables agents to leave notes to other agents or administrators in Pureservice. The note will *not* be sent to the user who reported the ticket. Internal notes are not visible to the end user in Selfservice. All agents and administrators can delete internal notes by clicking **Delete**. The note can be pinned to the top of the communication list. This is done by pressing the ⋮ button, and selecting *Pin note*.

> ✳  Internal notes are not visible to the end user in Selfservice.

## Internal note templates

Clicking the ⚡ icon opens the template menu, showing your personal and shared templates.



You can see who created the template by hovering the mouse over the 👤 icon, and here it is also possible edit and delete templates.
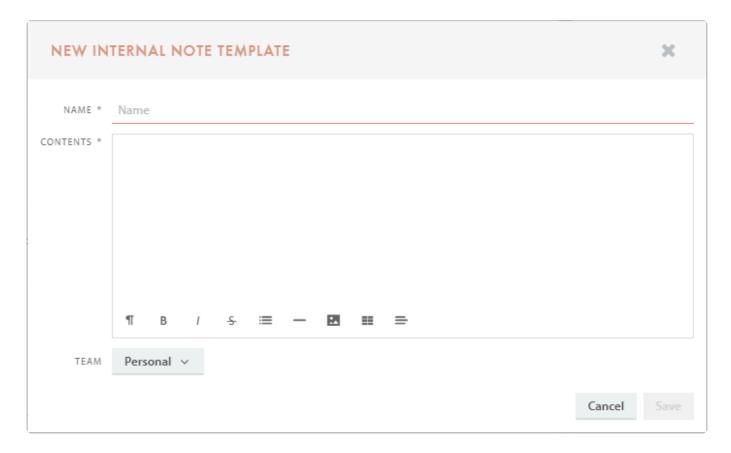
Clicking on one of the templates pastes the template into the internal note window.

Creating a new Internal note template is done by clicking the ➕ New icon in the template menu. This opens a

modal window.

## NEW INTERNAL NOTE TEMPLATE

NAME *  Name

CONTENTS *

TEAM   Personal ⌄

Cancel   Save

**SMS**

The SMS function enables you to send a SMS from Pureservice to a user. The entry type is marked with a mobile phone icon. If two-way SMS is configured, the user can reply to the SMS message.

**Rose Torres**                                                                                              a day ago

To:   +4711223344
Created:   Wed, Aug 2 2017 01:24

Feilen er rettet
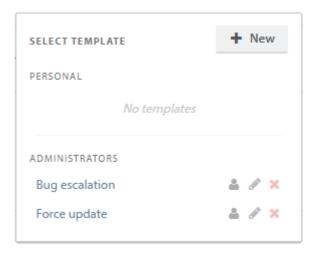
> ✳  SMS messages sent to or from the end user is visible to the end user in Selfservice.
>    SMS messages sent to or from a third party is not visible to the end user in Selfservice.

## SMS **templates**
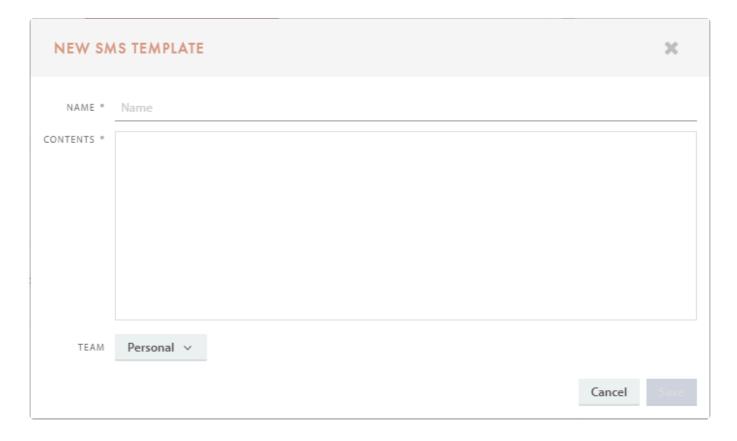
Clicking the ⚡ icon opens the template menu, showing your personal and shared templates.

You can see who created the template by hovering the mouse over the 👤 icon, and here it is also possible edit and delete templates.
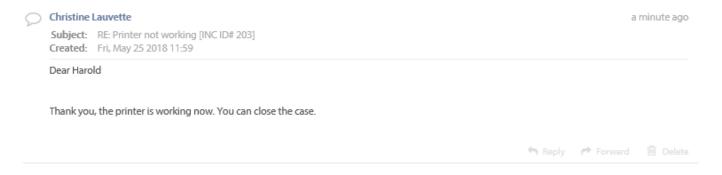
Clicking on one of the templates pastes the template into the SMS window.

Creating a new SMS template is done by clicking the **✚ New** icon in the template menu. This opens a modal window.
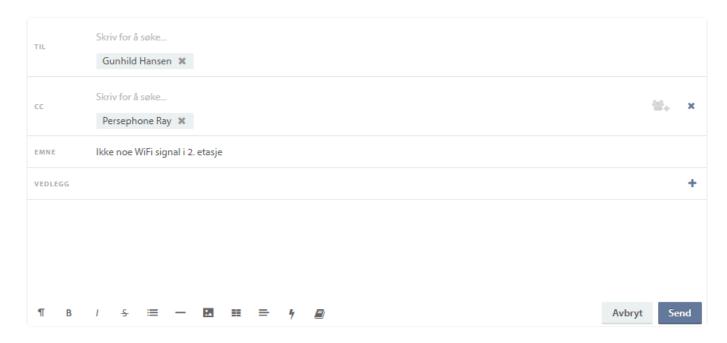


## Message

The message function enables you to send an email from Pureservice to a user. The entry type is marked with a message bubble icon.

Christine Lauvette — a minute ago

**Subject:** RE: Printer not working [INC ID# 203]
**Created:** Fri, May 25 2018 11:59

Dear Harold

Thank you, the printer is working now. You can close the case.

↩ Reply    ↪ Forward    🗑 Delete

You can chose to reply or forward an incoming message. You do this by clicking **Reply** or **Forward**. It is also possible to delete existing messages.
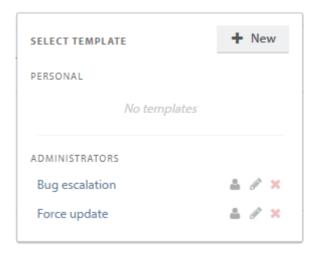
By default, the user who reported the ticket is entered in the "To" field on new messages you create or messages you reply to. Messages you forward will have an empty "To" field. You can also add recipients, either in the "To" field or "Cc". To do this, simply search for a user, for example by first name, last name, company, phone number or email. Any users added to the ticket CC will automatically be added to the CC of a new message.

| TIL | Skriv for å søke... |
| --- | --- |
| | Gunhild Hansen ✖ |
| CC | Skriv for å søke... |
| | Persephone Ray ✖ |
| EMNE | Ikke noe WiFi signal i 2. etasje |
| VEDLEGG | + |

Avbryt    Send

When sending a message, you can choose to use a message template, by clicking on the ⚡ icon, or FAQ article, by clicking the 📖 icon. You can edit the template or article before sending the message.

## Message templates
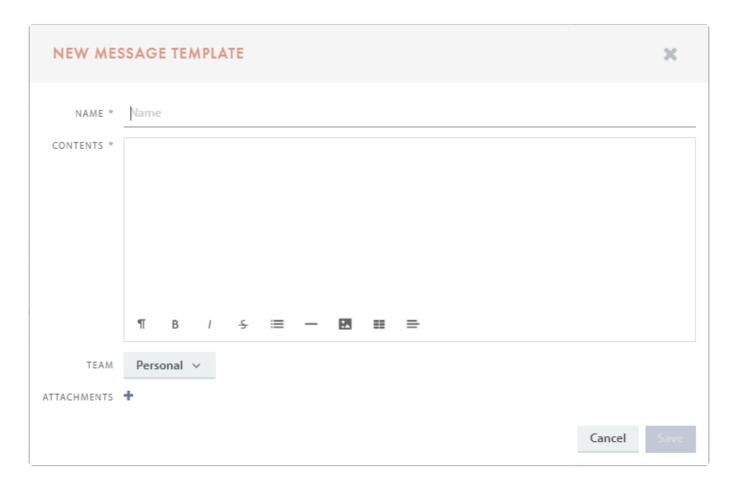
Clicking the ⚡ icon opens the template menu, showing your personal and shared templates.

You can see who created the template by hovering the mouse over the 👤 icon, and here it is also possible edit and delete templates.

Clicking on one of the templates pastes the template into the message window.

Creating a new message template is done by clicking the **+ New** icon in the template menu. This opens a modal window.



**FAQs**

The 📖 icon opens the FAQ menu. Click on a FAQ to paste it into the message window or click the ↗ icon to go directly to the article.

> ✳ Messages sent to or from the end user is visible to the end user in Selfservice.
> Messages sent to or from a third party is not visible to the end user in Selfservice.

## Solution

It is mandatory to fill out a solution when changing a ticket's status to **resolved** or **closed**.



If **Enduser visibility** is set to: **Visible without receipt-/solution e-mails** or **Not visible** the solution will not be sent to the end user. The icon 👁 will indicate this.
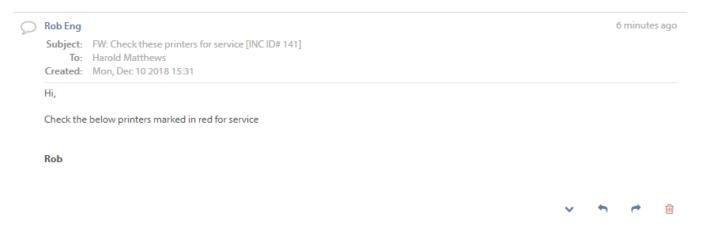


If there are no **Recipients** added to the case the solution email is controlled by the *E-mail user when Ticket is resolved* workflow, and uses the *Send E-mail On Ticket Solved* template. If a **Recipient** has been added to the case the *E-mail user and ticket recipients (CC) when Ticket is resolved* workflow will be used instead, and it will use the *Send E-mail On Ticket Solved To End User and Ticket Recipients (CC)* template.

Any previous communication in the ticket can be used as a solution by pressing the ⋮ icon, and selecting *Use as solution and resolve ticket*. This will set the ticket status to solved, and automatically fill the solution field with the content of the communication.

## Hidden information

Some of the communication types, such as internal note and message, hide less important information by default. Click on the entry to show all information.
For example, messages contain hidden info like receiver and sent status, and internal notes show when it was created and last edited.
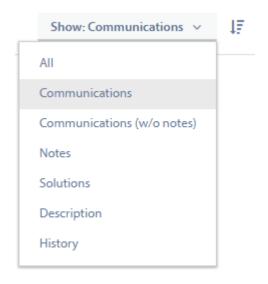
**Rob Eng**

6 minutes ago

**Subject:** FW: Check these printers for service [INC ID# 141]
**To:** Harold Matthews
**Created:** Mon, Dec 10 2018 15:31

Hi,

Check the below printers marked in red for service

Rob

Click **Show whole message** ⌄ to view the full e-mail in the communication feed.

## Filtering the feed

There is a filter to the right in the centre content section. The filter is by default set to **communications**, but you can also choose to show **all**, **communications (w/o notes)**, **notes**, **solutions**, **description** and **history**.

**Show: Communications** ⌄

- All
- Communications
- Communications (w/o notes)
- Notes
- Solutions
- Description
- History

By clicking on **Sort with oldest on top** the oldest elements in the communication feed will be shown at the top. Click again to sort with newest on top in the feed.

By choosing **Show:All** or **Show:History**, you will be able to see system details such as if any communication has been deleted and who did it and different changes to the ticket.

**Harold Mathews**
Note deleted
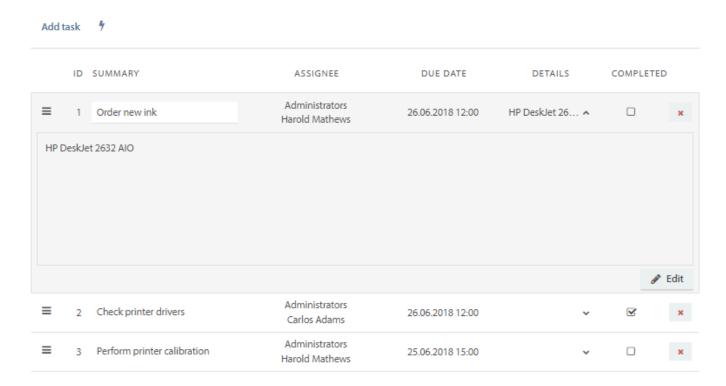
2 minutter siden
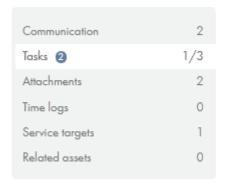
# Tasks

Choosing **Tasks** in the Sidebar shows you the tasks belonging to this ticket.

Add a new task by clicking **Add task**. Expand the details to see details and to open edit mode.

The blue number in the sidebar after **Tasks** shows how many active tasks that are assigned to you.
The numbers to the right shows how many completed tasks / tasks in total this ticket has.
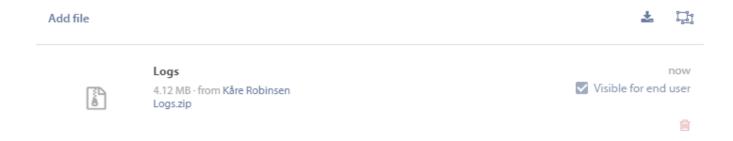
# Attachments

> ✳ The max file size for attachments uploaded directly to Pureservice is 10MB and you will get an error message specifying this if you attempt to upload larger files.
> Larger files can be imported if sent through an email — the default limit is 20MB in Exchange (Outlook) and 25MB in Gmail.
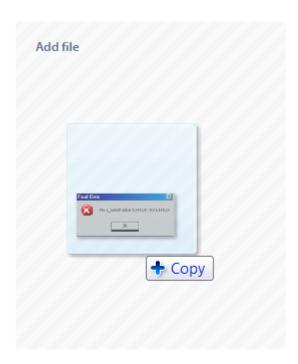
Choosing the **attachments** option in the content menu opens the ticket's attachments. Here, you can add, preview, download and delete attachments. It is also possible to choose which attachments should be visible to the enduser.



## Add file

You can add an attachment in one of two ways: either press **Add file** and browse the file system for the file, or drag-and-drop the file from a folder to the center content section. Below is a picture that illustrates how to drag-and-drop a file.



Pureservice will let you know if you are outside the drag-and-drop boundaries, by replacing ➕ Copy with a forbidden sign 🚫 .

You can add any previously uploaded attachment to a new communication by using the 📎 icon.

Identical attachments will automatically be grouped together. This also includes images in the users mail signature.

# Preview

To preview an attachment, click on the thumbnail. The attachment will be displayed centred on your screen and in full-size.

# Download
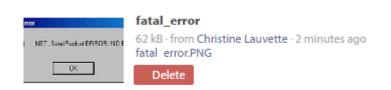
If you want to download an attachment to your local machine, simply click on the file name or use the 📥 icon to download all attachments.

# Delete

Hover over an attachment until a delete button appears. Click on the button to remove the attachment from the ticket.



# Attachment visibility
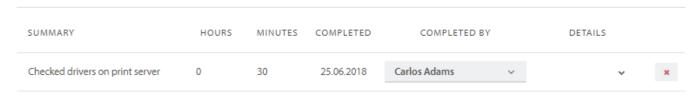
When adding an attachment to tickets, the attachment is visible to the end user by default. Remove the tick in the **Visible for end user** box to make the attachment visible to the agent only.

# Time logs

Choosing **Time logs** in the Sidebar shows you time logs related to this ticket.
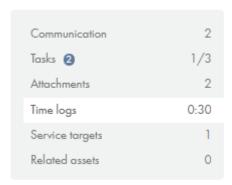
Add a new time log by clicking **Add time log**. Expand the details to see details and to open edit mode.
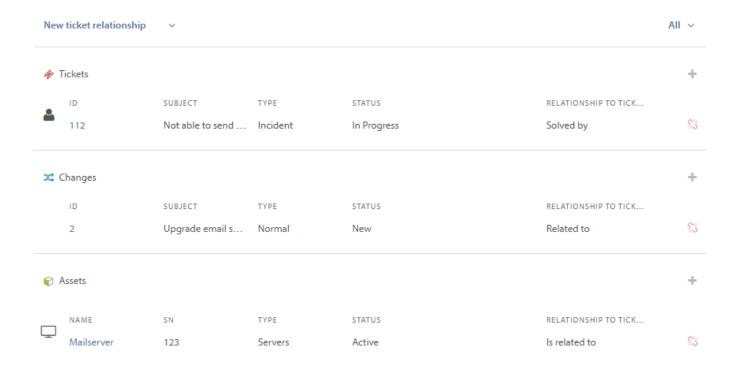
The numbers to the right in the sidebar menu shows you the total amount of time logged on this ticket.

# Relationships
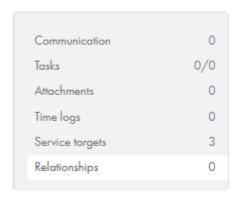
Choosing **Relationships** in the Sidebar shows you tickets, changes and assets related to this ticket.

| New ticket relationship ⌄ | | | | | All ⌄ |
|---|---|---|---|---|---|

**⚘ Tickets**     +

| | ID | SUBJECT | TYPE | STATUS | RELATIONSHIP TO TICK... | |
|---|---|---|---|---|---|---|
| 👤 | 112 | Not able to send ... | Incident | In Progress | Solved by | ⚙ |

**⤬ Changes**     +

| | ID | SUBJECT | TYPE | STATUS | RELATIONSHIP TO TICK... | |
|---|---|---|---|---|---|---|
| | 2 | Upgrade email s... | Normal | New | Related to | ⚙ |

**📦 Assets**     +

| | NAME | SN | TYPE | STATUS | RELATIONSHIP TO TICK... | |
|---|---|---|---|---|---|---|
| 🖥 | Mailserver | 123 | Servers | Active | Is related to | ⚙ |

To remove a relationship, click the ⚙ button next to the relationship.
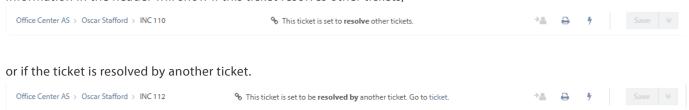
The numbers to the right in the sidebar shows you the how many items are related to the ticket.

| | |
|---|---|
| Communication | 0 |
| Tasks | 0/0 |
| Attachments | 0 |
| Time logs | 0 |
| Service targets | 3 |
| Relationships | 0 |
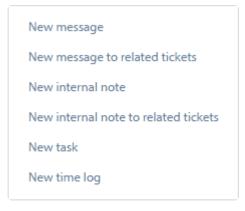
# Solving relationships

If a solving relationship is chosen as the relationship type, you can solve all related tickets at the same time.
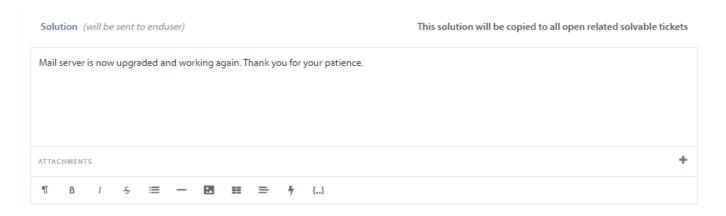
Information in the header will show if this ticket resolves other tickets,

| Office Center AS > Oscar Stafford > INC 110 | ⚲ This ticket is set to **resolve** other tickets. | ⇥👤 🖨 ⚡ | Save ⌄ |
|---|---|---|---|

or if the ticket is resolved by another ticket.

| Office Center AS > Oscar Stafford > INC 112 | ⚲ This ticket is set to be **resolved by** another ticket. Go to ticket. | ⇥👤 🖨 ⚡ | Save ⌄ |
|---|---|---|---|

It is also possible to send messages and save internal notes to all related tickets from the parent ticket.

New message

New message to related tickets

New internal note

New internal note to related tickets

New task

New time log

When solving the parent ticket, all child tickets will be solved as well, sending out the same solution emails.

Solution  *(will be sent to enduser)*                     This solution will be copied to all open related solvable tickets

Mail server is now upgraded and working again. Thank you for your patience.

ATTACHMENTS                                                                                        +

¶   B   I   S   ☰   —   🖼   ▦   ≡   ⚡   {..}
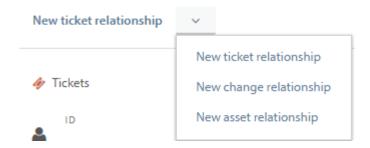
* Whether a child ticket can be resolved or reopened independently or not depends on what is set in the relationship type settings in the Administrator
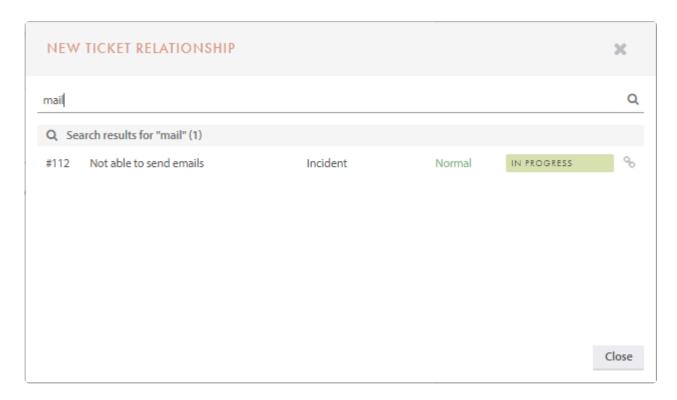
# New relationships

Relate new items by clicking the ✚ button or by choosing relationship type in the top menu.
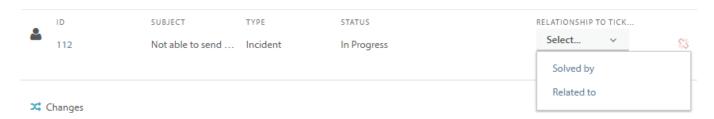
**Search for other tickets to relate by searching for the ticket subject.**
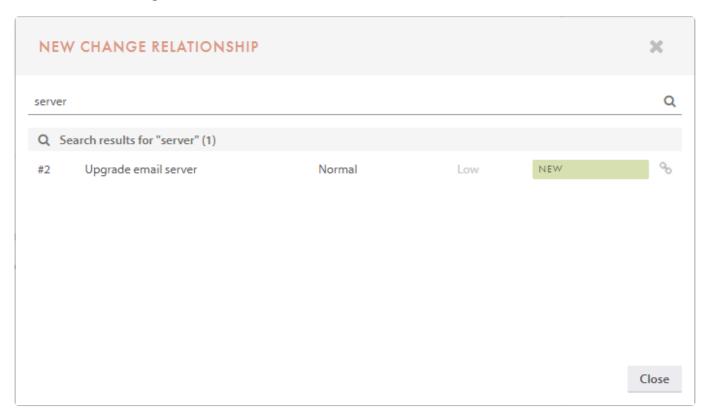
Only the tickets that conform to already created relationship-types will be available in this search. If you are unable to find the ticket you are trying to relate to, make sure the relationship-type is created by an administrator.
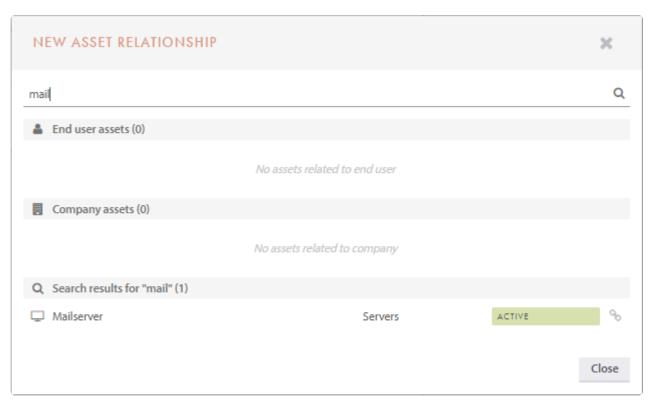
If more than one relationship type is available, you need to choose this in the drop-down box

**Or search for a change.**

NEW CHANGE RELATIONSHIP ✖

| server | | | | | 🔍 |
|---|---|---|---|---|---|

🔍 Search results for "server" (1)

| #2 | Upgrade email server | Normal | Low | NEW | 🔗 |
|---|---|---|---|---|---|

Close
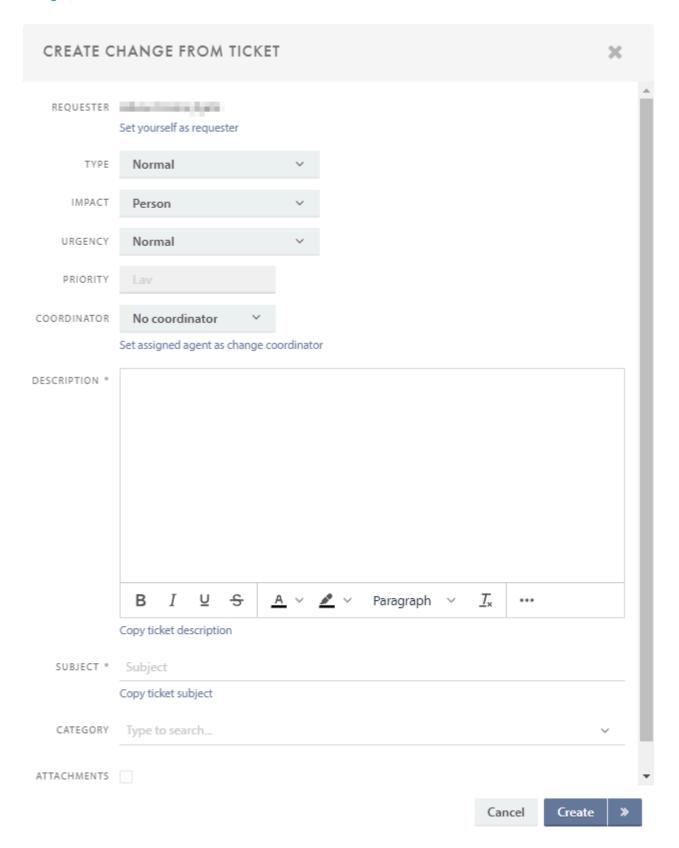
**Search for an asset by using the search field, or choose an asset already related to the end user or company**

NEW ASSET RELATIONSHIP ✖

| mail | 🔍 |
|---|---|

👤 End user assets (0)

*No assets related to end user*

🗐 Company assets (0)

*No assets related to company*

🔍 Search results for "mail" (1)

| 🖥 Mailserver | Servers | ACTIVE | 🔗 |
|---|---|---|---|

Close

# Create a change from ticket
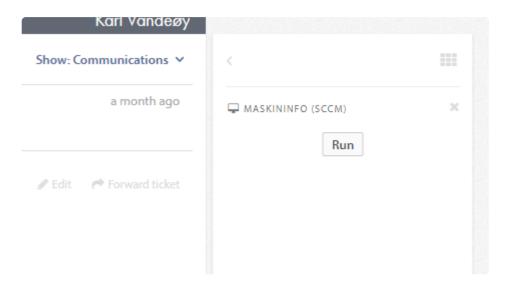
If you press the ⤬ icon in the header, you will open a menu for creating a **change** based on the ticket you have open.

This change can copy information from the open ticket, specifically **coordinator**, **description**, **attachments** and **subject**. Otherwise fill in all informastion as you would when creating a change.(Press here for more information about changes)

CREATE CHANGE FROM TICKET     ✕

REQUESTER
Set yourself as requester

TYPE    Normal

IMPACT    Person

URGENCY    Normal

PRIORITY    Lav

COORDINATOR    No coordinator
Set assigned agent as change coordinator

DESCRIPTION *

B   I   U   S    A ⌄   ✎ ⌄   Paragraph ⌄   I_x   ⋯

Copy ticket description

SUBJECT *    Subject
Copy ticket subject

CATEGORY    Type to search...

ATTACHMENTS ☐

Cancel    Create   »

# Apps

On the right hand side there is a menu for integrating apps with Pureservice. These apps have to be configured in
**Admin -> General -> Apps**
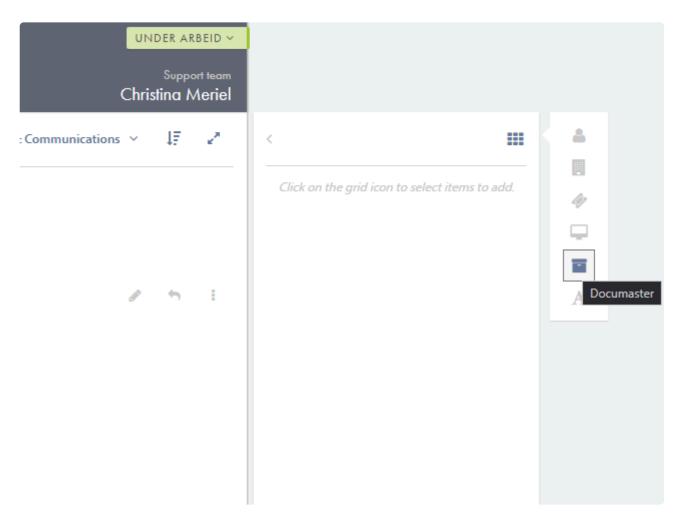
# Documaster-lookup

Documaster gives agent access to view ticket archived in Documaster.
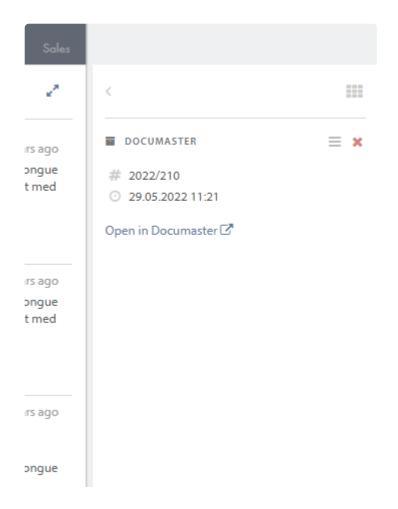
## Enabling the app

To display the Documaster-widget you need to enable it (unless the "always on" flag has been set in the configuration).



## Using the app

When the app is active, you can see if the ticket has been archived in Documaster. If the ticket is archived, the ticket number along with it's initial archival timestamp will be displayed. We also provide a link that opens the ticket in Documaster.

Sales

rs ago

ongue
t med

rs ago

ongue
t med

rs ago

ongue

**DOCUMASTER**

\# 2022/210

🕐 29.05.2022 11:21

Open in Documaster 🗗

# User information
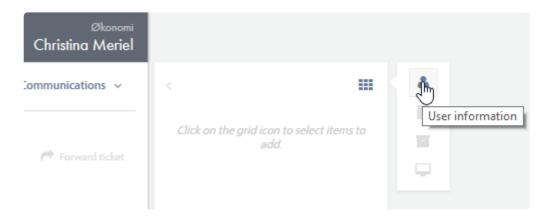
This app gathers the info from the end users profile and displays it in the sidebar.
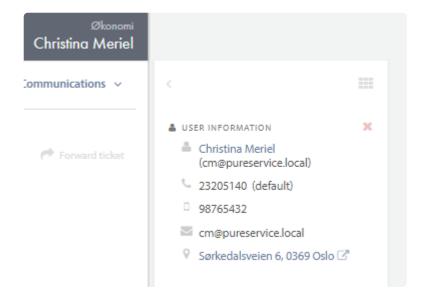
## Enabling the app

To display profile information you need to enable the app by selecting it



## Using the app

When the app is selected you can view relevant profile information in the sidebar
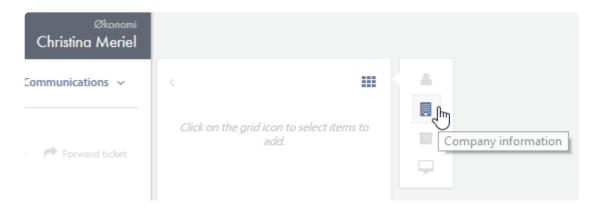
# Company information

This app gathers the info from the end users company and displays it in the sidebar.
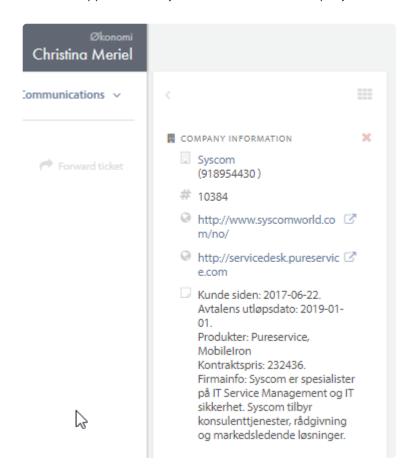
## Enabling the app

To display profile information you need to enable the app by selecting it



## Using the app

When the app is selected you can view relevant company information in the sidebar
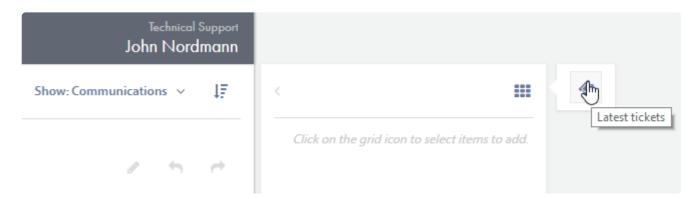
# Latest tickets

This app shows the latest tickets from the end user or its company.
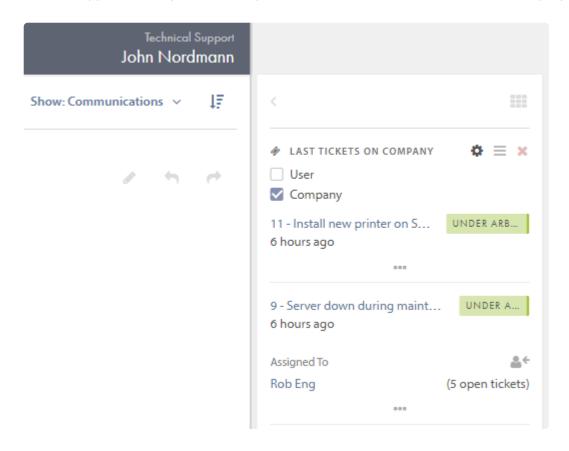
## Enabling the app

Enable the app to display info about the latest tickets.



## Using the app

When the app is enabled, you can view up to the 10 latest tickets on an end user or its company.



Click on settings ⚙ to choose whether to see the end users tickets or the companys.

Click on show assigned agent ⋯ to show more info on one ticket.
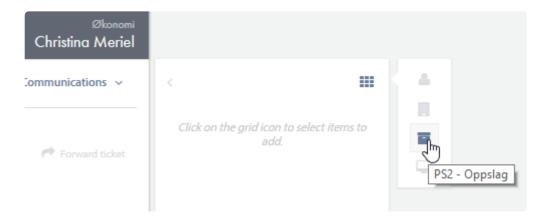
Click on assign ticket 👤← to assign the ticket to the agent who had that ticket last time.

# Pureservice 2 lookup

This app connects to an instance of Pureservice 2 and make it possible to view Pureservice 2 tickets.
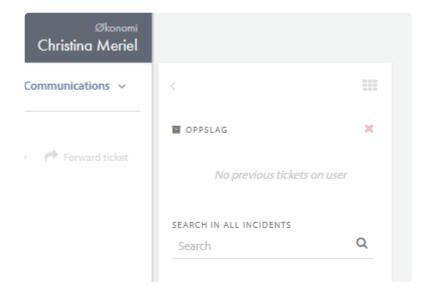
## Enabling the app

To display profile information you need to enable the app by selecting it



## Using the app
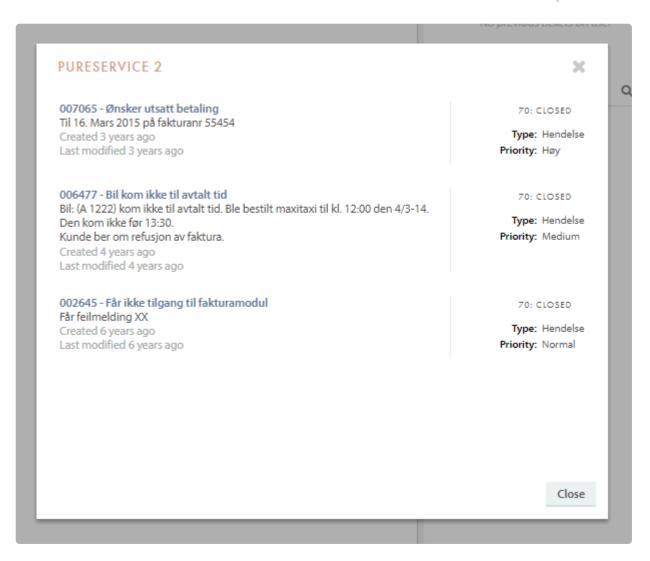
When the app is selected you can view relevant profile information in the sidebar



By searching, you will see all tickets containing the search word. If you click on a result, a new browser window will open and take you to the Pureservice 2 instance.

## PURESERVICE 2 ✖

**007065 - Ønsker utsatt betaling**
Til 16. Mars 2015 på fakturanr 55454
Created 3 years ago
Last modified 3 years ago

70: CLOSED

**Type:** Hendelse
**Priority:** Høy

**006477 - Bil kom ikke til avtalt tid**
Bil: (A 1222) kom ikke til avtalt tid. Ble bestilt maxitaxi til kl. 12:00 den 4/3-14.
Den kom ikke før 13:30.
Kunde ber om refusjon av faktura.
Created 4 years ago
Last modified 4 years ago

70: CLOSED

**Type:** Hendelse
**Priority:** Medium

**002645 - Får ikke tilgang til fakturamodul**
Får feilmelding XX
Created 6 years ago
Last modified 6 years ago

70: CLOSED

**Type:** Hendelse
**Priority:** Normal

Close

# SCCM lookup

One of the apps available is Microsoft System Center Configuration Manager 2012 R2. If configured correctly it should allow the agent to query the SCCM database for information regarding the computer related to the end user.

> ✳ The SCCM App is only a lookup tool and is not related to Asset or Asset Import in Pureservice.
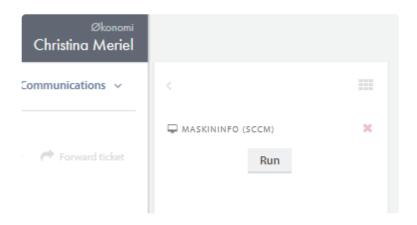
## Enabling the app
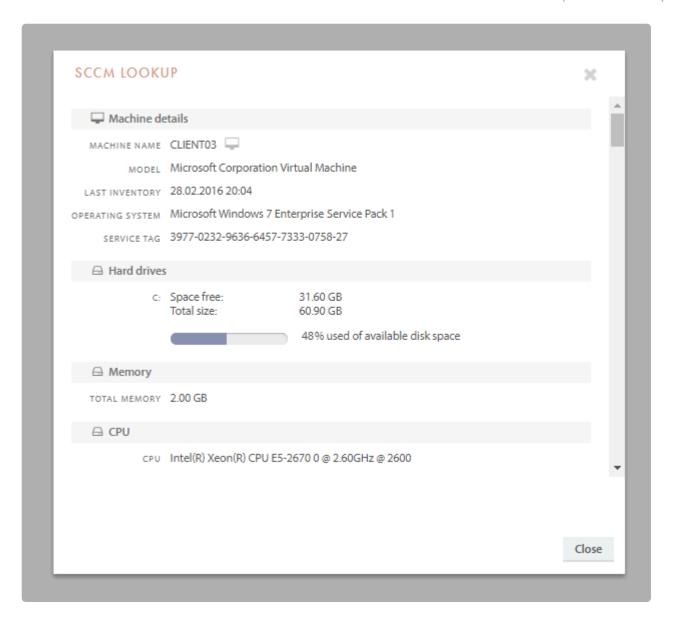
To display profile information you need to enable the app by selecting it



## Using the app

When the app is selected you can view relevant profile information in the sidebar

## SCCM LOOKUP ✖

### 🖥 Machine details

| | |
|---|---|
| MACHINE NAME | CLIENT03 🖥 |
| MODEL | Microsoft Corporation Virtual Machine |
| LAST INVENTORY | 28.02.2016 20:04 |
| OPERATING SYSTEM | Microsoft Windows 7 Enterprise Service Pack 1 |
| SERVICE TAG | 3977-0232-9636-6457-7333-0758-27 |

### 🖨 Hard drives

C: Space free:      31.60 GB
Total size:      60.90 GB

48% used of available disk space

### 🖨 Memory

TOTAL MEMORY   2.00 GB

### 🖨 CPU

CPU   Intel(R) Xeon(R) CPU E5-2670 0 @ 2.60GHz @ 2600

Close
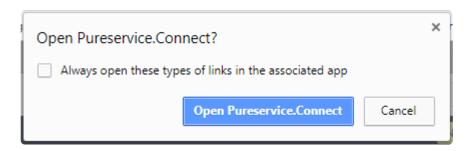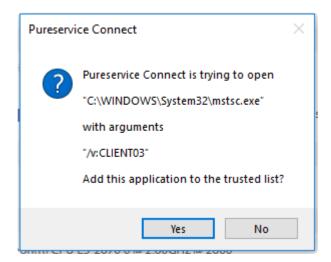
# Pureservice connect

You can remote control the end user by clicking the 🖥 icon in the SCCM lookup window.

First time using Pureservice Connect these popup window will ask for permission.

**Open Pureservice.Connect?** ✕

☐ Always open these types of links in the associated app

**Open Pureservice.Connect**    Cancel

---

**Pureservice Connect** ✕

❓ Pureservice Connect is trying to open

"C:\WINDOWS\System32\mstsc.exe"

with arguments

"/v:CLIENT03"

Add this application to the trusted list?

Yes    No
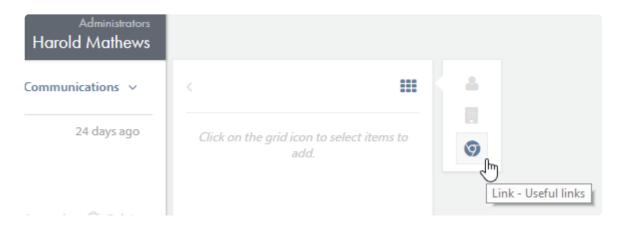
**Install Pureservice Connect here**

# Links

This app shows agents custom links added by administrators.
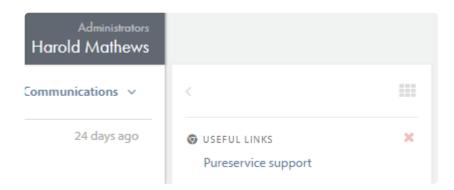
## Enabling the app

To display custom links you need to enable the app by selecting it.



## Using the app

When the app is selected you can view custom links added by the administrators in the sidebar.
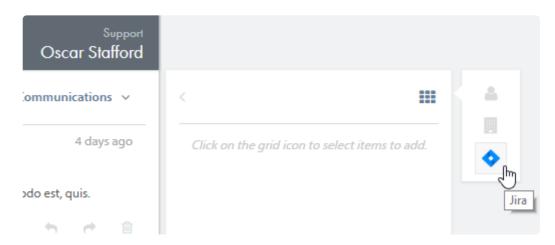


By clicking a link a new tab is opened in the browser window.

# Jira

One of the apps available is Jira. If configured correctly it should allow the agent to see and create issues in Jira.
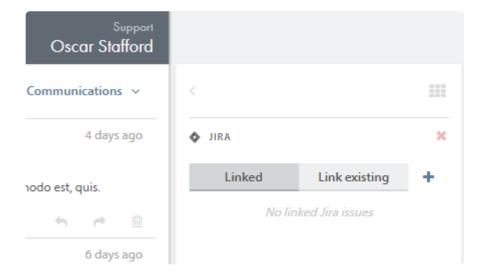
## Enabling the app

To display the Jira widget you need to enable it



## Using the app

When the app is selected you can see linked Jira issues, link existing Jira issues and create new Jira issues (if allowed) in the sidebar.

# Create new issue
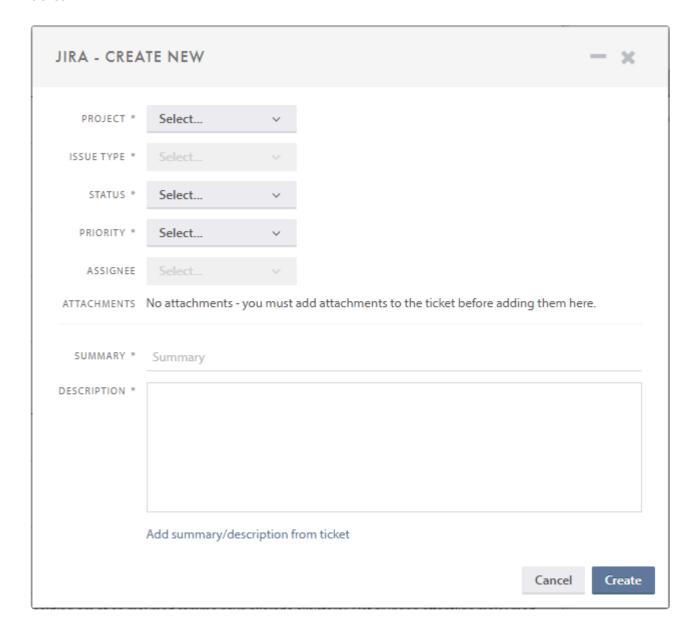
Creating a new Jira issue is done by clicking the **+** icon in the app.

Depending on the setup, some of these fields might be prepopulated or removed. Fields marked with a star are mandatory fields.

The **Project**, **Issue type**, **Status**, **Priority** and **Assignee** field contain information from Jira.
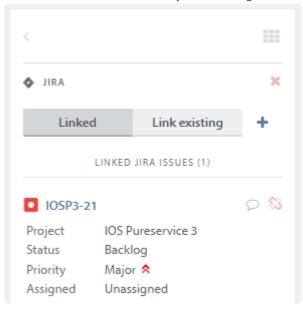
Attachments must be added to the Pureservice ticket before adding them to the Jira issue.

It is possible to add summary and description from the Pureservice ticket by clicking **Add summary/description from ticket**

# Working with existing issues
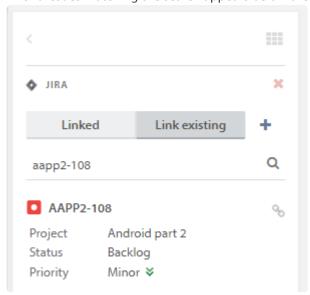
If the Pureservice ticket already has existing linked Jira issues, they will be visible in the app under **Linked**

Click **Link existing** for linking a new Jira issue. A search box appears, here you can search for existing Jira issues, either by Jira key or query.

All Jira issues matching the search appears below the search box.

Click on the Link issue  icon to link the Jira issue to the Pureservice ticket.
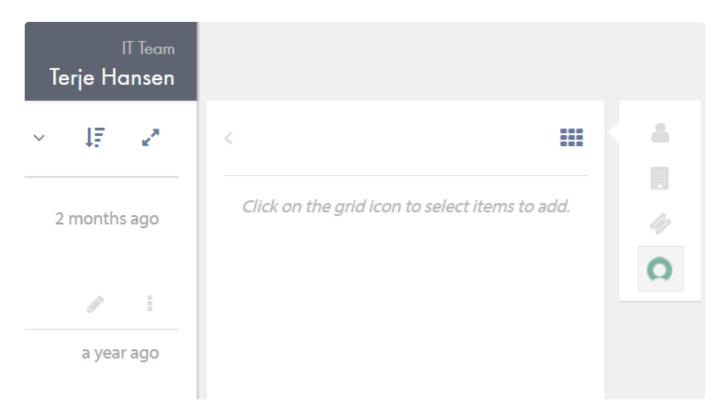
# ServiceNow

One of the apps available is ServiceNow. If configured correctly it should allow the agent to see and create cases in ServiceNow.
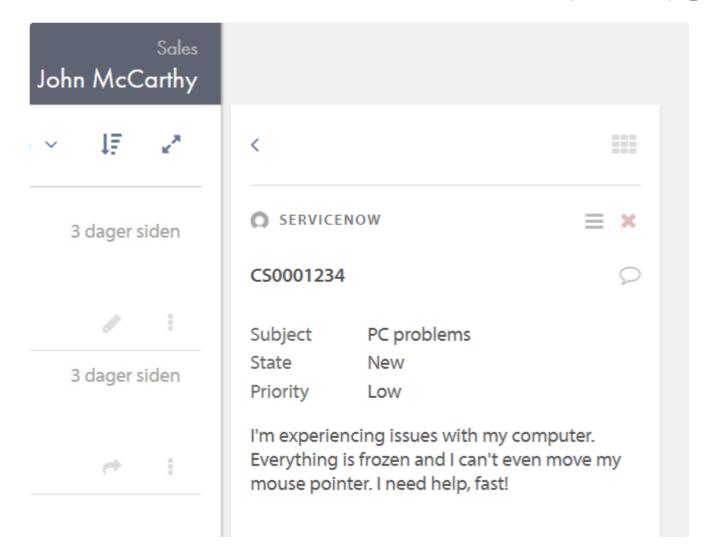
## Enabling the app

To display the ServieNow widget you need to enable it (unless the "always on" flag had been set in the configuration)



## Using the app

When the app is selected you can see the linked ServiceNow case, view existing comments and send new comments. If additional attachments are added to the ticket in Pureservice, these can also be sent to ServiceNow from the comment dialog.

Sales
John McCarthy

3 dager siden

3 dager siden

<

SERVICENOW

CS0001234

| Subject | PC problems |
|---------|-------------|
| State | New |
| Priority | Low |

I'm experiencing issues with my computer.
Everything is frozen and I can't even move my
mouse pointer. I need help, fast!
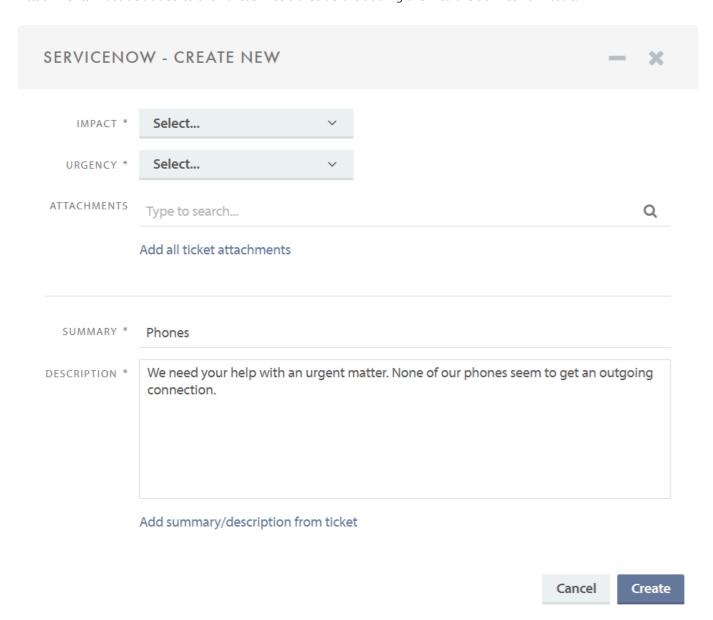
# Create a new issue

Creating a new ServiceNow case is done by clicking the ✚ icon in the app.
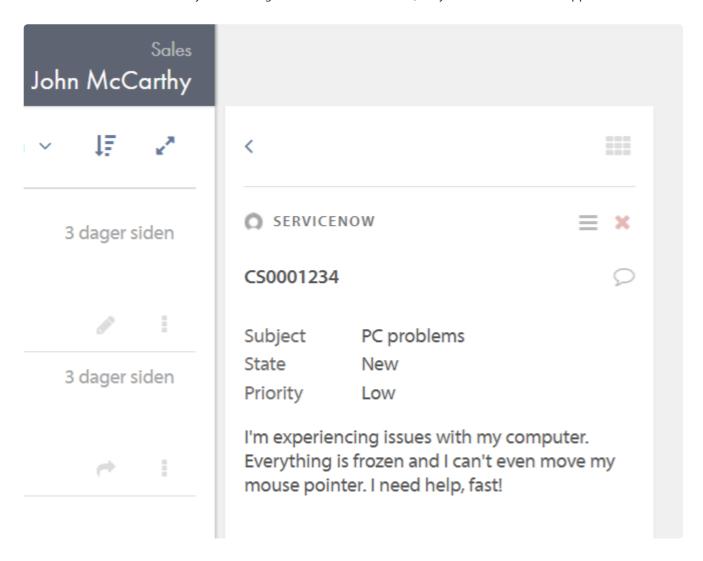
The **Impact** and **Urgency** fields are values from ServiceNow. The other fields (**Attachments**, **Summary** and **Description**) can be copied from the ticket by using the **Add from ticket** links in the dialog

Attachments must be added to the Pureservice ticket before adding them to the ServiceNow issue.

| SERVICENOW - CREATE NEW | — ✕ |
|---|---|

| IMPACT * | Select... ⌄ |
|---|---|
| URGENCY * | Select... ⌄ |
| ATTACHMENTS | Type to search... 🔍 |

Add all ticket attachments

| SUMMARY * | Phones |
|---|---|
| DESCRIPTION * | We need your help with an urgent matter. None of our phones seem to get an outgoing connection. |

Add summary/description from ticket

Cancel        Create

# Working with existing cases

If the Pureservice ticket already has existing linked ServiceNow cases, they will be visible in the app



Click the speech bubble icon ⬭ to open the comments dialog. Here you can view the comments and internal notes in ServiceNow as well as send new ones. If new attachments are added to the ticket, they will be available to send from this dialog.

## SERVICENOW - COMMENTS  — ✕

sn_pureservice_integration                                    an hour ago
Can you please expedite this case?

___

**Add comment**

[                                                                    ]

Close    Add

# Changes

As mentioned in the previous chapter, Pureservice organizes tickets by grouping them into predefined lists. If the Change module is installed, you will also be able to see the lists regarding change requests, and tasks.

Change requests and tasks are organized into sets of predefined lists, to make the workload easier to handle. In

addition, you can create your own lists by clicking on the filter icon in the upper right corner. You can read more about the change filter in the subchapter List functions – Change filter.

## Board view

You can choose to display the changes in a list view or a board view, by pressing . The latter presents registered changes and statuses in a straightforward and lucid way. It is not possible to filter changes once you have opened the board view, unlike the list view. In order to filter changes, you have to choose a list while you are still in the list view, and optionally make changes to the filter, before you enter the board view.

For the time being, it is not possible to move the changes in the board, you can only look at them. This makes the board particularly valuable in planning meetings, where it is important to have an overview of the statuses.

## Tasks

It is only possible to add tasks to changes. Go to the subchapter Working with a change request – details for information on how to create tasks.

For general information about tasks, e.g. predefined task lists and list functions, go to the next chapter, Tasks.

# List menu

Changes are sorted into predefined lists in the list menu:

- **Coordinated by me**: change requests that are coordinated by you personally
- **Open**: open change requests (with one of the following core statuses: new, planning, implementation or implemented) without a coordinator
- **All**: all change requests



Pay attention to the number to the right of every list heading, as it indicates how many elements there are in that particular list.
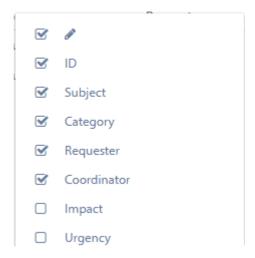
# List functions

The change lists have several important functions: customizable list view, resizable columns, column sorting, indications of unsaved changes, function to download lists (as CSV files) and a filter to create custom lists. All of the functions are discussed in the following subchapters. Elements in changes lists are automatically updated if modified by someone else.



## Customizable list view
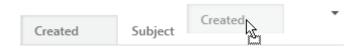
It is possible to customize both the ticket and change list view. Right click on a column header to open the column menu, and choose the columns you want to see in the list view.



The column options for the change list view differs slightly from the options for the ticket list view.

## Resizable coulmns

To move a column, drag an drop the column.
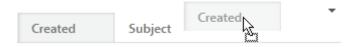


To resize a column, simply drag the column to the desired length.

# Coulmn sorting

To move a column, drag an drop the column.



To resize a column, simply drag the column to the desired width.



# Unsaved changes

The pencil icon , in the leftmost column, indicates that a change request has been modified and that the changes have not been saved. In addition, most of the row is highlighted.



# Delete change

Agents can mark changes for deletion to show the administrators that the marked change can be deleted. Agents cannot delete the change themselves, as this require access to the admin console.

To mark a change for deletion you need to right click one or more changes in the list and chose **Mark selected changes for deletion**
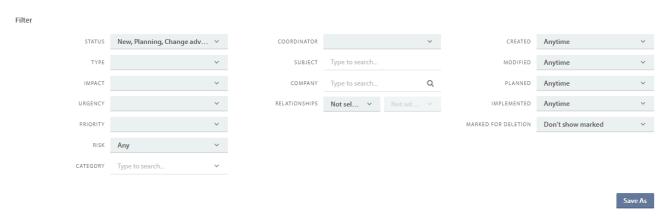


# Download change list

You can download the list you are currently viewing or working on, by clicking  in the upper right corner. The list is downloaded as a CSV file, and can be opened by programs such as Microsoft Excel. All columns are included in the downloaded file, even the columns you have hidden in the Agent Console.

# Change filter

As mentioned earlier in the User Manual, Pureservice comes with a set of predefined change lists (coordinated by me, open and all). Each list has a default filter applied to its record set. It is also possible to create custom filters and lists, or temporarily edit the default ones. Click [filter icon] to open the filter menu. To close the menu, click on the filter button again.
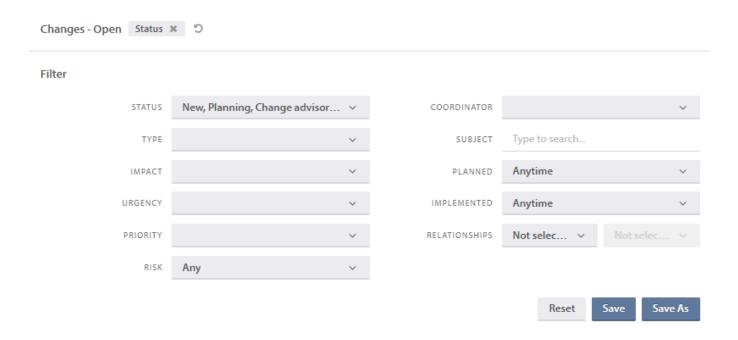


When it comes to the change filter, Pureservice lets you filter changes based on **status**, **type**, **impact**, **urgency**, **priority**, **risk**, **category**, **coordinator**, **subject**, **company**, **relationships**, **created**, **modified planned**, **implemented** and **Marked for deletion**.

## Edit a default filter

Most default filter comes with a set of predefined values. Simply click on the drop-down lists to select the options (one or multiple) that are best suited for your list.
Once you have made changes to a default filter, a "Reset" button appears to the left of the "Save As" button. Click on the "Reset" button (or the ↺ -button near the top of the page) to undo changes.
Changes made to a default filter are only temporary. To save the changes, you have to create a new personal list.

# Create a new personal list

To create a custom-made personal list, select an existing list as a baseline for the new one and open the filter menu. You can either make changes to the chosen filter before saving it as a list, or edit the personal list after it has been created. Clicking "Save as" will open a modal window where you can enter a unique list name, and create the list.

Press "Add" to create the list.

Custom-made lists are visible beneath the predefined lists.

# Edit and delete an existing personal list

It is possible to edit both the filter values of a personal list and its name. You can also delete a personal list.

When you hover over a personal list, two new icons (a pencil and a cross) appear to the right of its name.

To edit the list name, click in the pencil. Doing so will open a modal window, where you can rename the list.



To delete a personal list, click on the cross. You will have to confirm your choice in order to delete the chosen list.



In order to make changes to filter values, simply click on the custom-made list you want to edit. Make sure that the filter menu is open. Once you have made changes to the filter, you can choose to **reset** it, **save** and overwrite the existing list or **save as** a new list.

The custom-made personal lists are located beneath the predefined lists. You can distinguish between these two types by hovering over them. The icons  are only visible when hovering over a custom-made list.

# Unsaved changes

Changes made to a filter, belonging to either a default or a personal list, are stored in your browsers local storage until you save them. A star is displayed next to the list to indicate that the list has unsaved changes.

# Board view

You can choose between two views when looking at the Changes overview; **List** view which is the default setting and **Board** view.

You can freely switch between which view you want in the top right corner when looking at a List of Changes, directly below your name and profile image. This setting is personal and will not affect other Agents and Administrators.
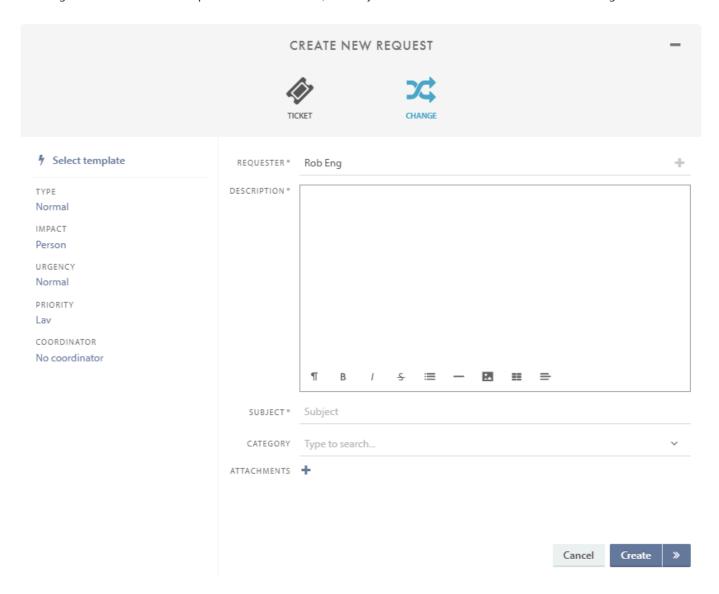


As you can see above, it is very easy to get an overview of what statuses each Change currently has in this view, along with some nice-to-have information such as Planned Date (the calendar icon), Finished Date (the calendar icon with a check mark), and the Change requester.

# Create a new change

To create a change manually, simply click on the "New" button in the leftmost menu.
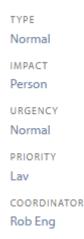


Clicking on the "New" button opens a modal window, where you can choose to create a ticket or a change.



Click the  button to create a new change based on a previously made template. Any information in the template will override what's currently written.

# Classification sidebar

The fields in the left sidebar are automatically populated with default values.

TYPE
Normal

IMPACT
Person

URGENCY
Normal

PRIORITY
Lav

COORDINATOR
Rob Eng
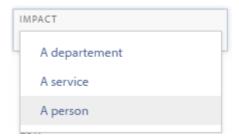
**Impact** and **Urgency** are both drop-down menus. If the default values do not apply for the change you are creating, you can easily replace them. **Priority** is set automatically based on Impact and Urgency.

## Type

An administrator can create new or modify change types. Types are used to describe what type of change it is.
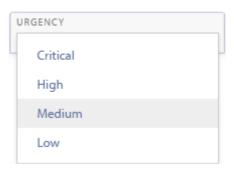
## Impact

Pureservice comes with a set of impact values: **A department**, **A service** and **A person**. Each value says something about whom the change will affect. The default impact value for a new change request is **A person**.

IMPACT

A departement

A service

A person

## Urgency

You can choose between four predefined urgencies when registering a change manually: **Critical**, **High**, **Medium** and **Low**. Default urgency value for a new change request is **Medium**.

## Priority

Which priority a change request gets, depends on the chosen impact and urgency values. The priority is automatically set by Pureservice, and cannot be set manually.
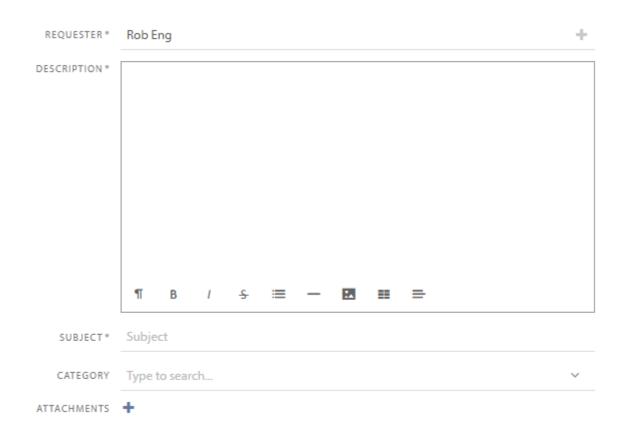
✳  Administrators can configure the priority values in the Administrator Console.

## Coordinator

A change coordinator within the teams you are member of can be set.

# Change details
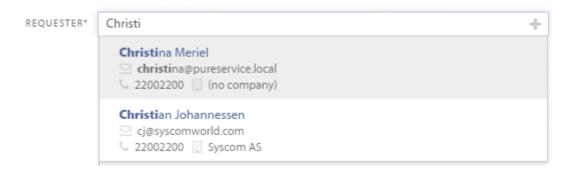
The **Requester** field is automatically populated, while you have to fill out the others manually. **Description** and **Subject** is mandatory. **Category** can be set as mandatory through the administrator settings.

REQUESTER *      Rob Eng                                                                        +

DESCRIPTION *

¶   B   /   S   ≔   —   🖾   ⊞   ≡

SUBJECT *        Subject

CATEGORY         Type to search...                                                              ⌄

ATTACHMENTS      ✚

# Requester
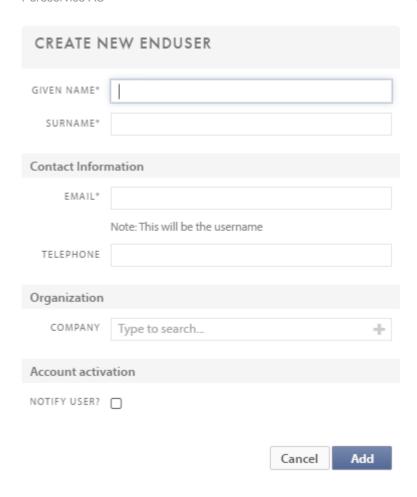
Pureservice automatically populates the **Requester** field with the name of the logged in user. If you need to switch the requester, you can easily replace him/her by searching for another existing user, or by creating a new one.

**Existing user**

REQUESTER*       Christi                                                                        +

**Christi**na Meriel
✉ christina@pureservice.local
☎ 22002200 ⬜ (no company)

**Christi**an Johannessen
✉ cj@syscomworld.com
☎ 22002200 ⬜ Syscom AS

**New user**

Clicking the "+" in the user search bar opens a new modal window where you can enter the necessary contact information to create a new user.

## CREATE NEW ENDUSER

GIVEN NAME*

SURNAME*

### Contact Information

EMAIL*

Note: This will be the username

TELEPHONE

### Organization

COMPANY     Type to search...     ✚

### Account activation

NOTIFY USER? ☐

Cancel    **Add**

✳ **Given name**, **Surname** and **Email** are all mandatory fields. The email is also the Pureservice username. Please note that you can choose to notify the user about the newly created Pureservice account.

# Description

It is important that you describe what the change request is about. Fill in suitable information in the **description** area.

DESCRIPTION*

¶   B   *I*   S   ☰   ☰   ⊞   🖼   ☰   —

There is a tool line at the bottom, with the following functions:

| | | | | |
|---|---|---|---|---|
| ¶ Formatting | B Bold | I Italic | Deleted text | Unordered list |
| Ordered list | Table tool | Insert image | Alignment | Insert horizontal rule |
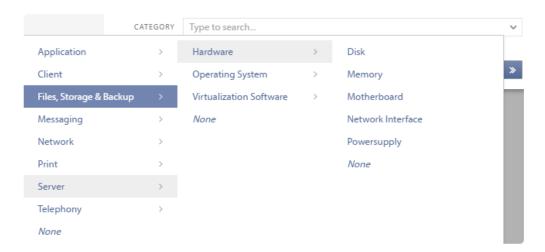
# Subject

The content in the subject field is the same as in the subject column in the change list, and is supposed to give a short summary of the description.

# Category

You can select a category in one of two ways: either by choosing one from the drop-down menu, or by searching for the category name. Setting a category is not mandatory in order to create a change unless this is chosen through administrator settings.

| CATEGORY | Type to search... | |
|---|---|---|
| Application > | Hardware > | Disk |
| Client > | Operating System > | Memory |
| Files, Storage & Backup > | Virtualization Software > | Motherboard |
| Messaging > | None | Network Interface |
| Network > | | Powersupply |
| Print > | | None |
| Server > | | |
| Telephony > | | |
| None | | |

# Attachment

Attachments can be added by clicking **+Upload file**. Multiple attachments can be added.

| ATTACHMENTS  + | | |
|---|---|---|
| W  Dashboard.docx | 97.3 KB | 🗑 |
| 📄  kvernr.txt | 2.72 KB | 🗑 |
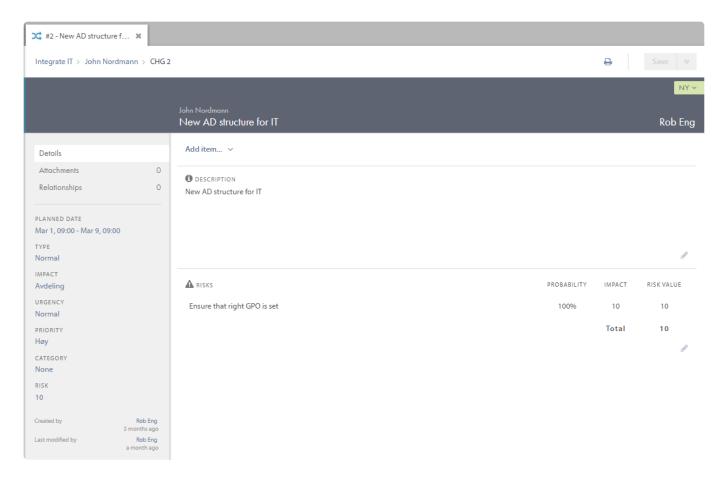
# Working with a change
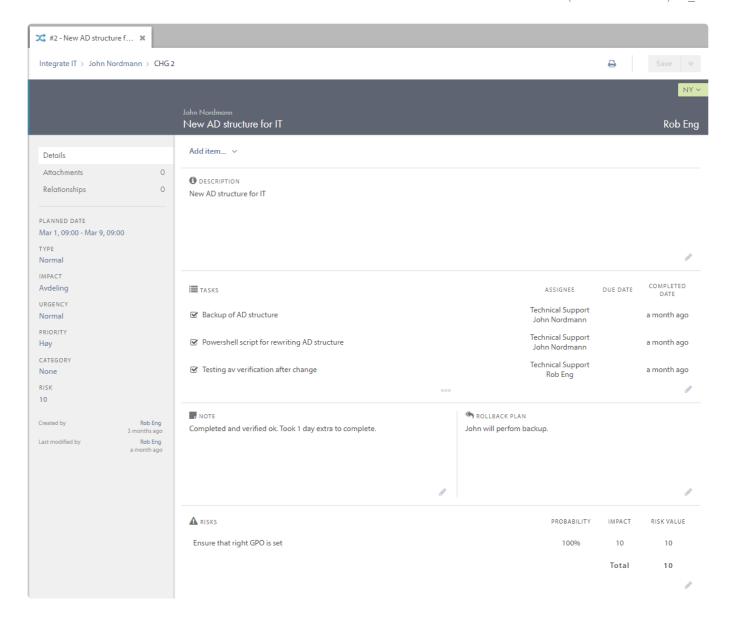
Double click on a change request that you want to work on in the change list in order to open it. The change request's working page is divided into three sections:

- Header
- Sidebar
- Center content

**Example of a newly created change request:**



**Example of a successfully implemented change request**

⤬ #2 - New AD structure f... ✖

Integrate IT › John Nordmann › CHG 2

🖨 Save ▾

NY ˅

John Nordmann
New AD structure for IT

Rob Eng

Details

| | |
|---|---|
| Attachments | 0 |
| Relationships | 0 |

PLANNED DATE
Mar 1, 09:00 - Mar 9, 09:00

TYPE
Normal

IMPACT
Avdeling

URGENCY
Normal

PRIORITY
Høy

CATEGORY
None

RISK
10

| | |
|---|---|
| Created by | Rob Eng |
| | 3 months ago |
| Last modified by | Rob Eng |
| | a month ago |

Add item...  ˅

ℹ DESCRIPTION
New AD structure for IT

✎

| ☰ TASKS | ASSIGNEE | DUE DATE | COMPLETED DATE |
|---|---|---|---|
| ☑ Backup of AD structure | Technical Support John Nordmann | | a month ago |
| ☑ Powershell script for rewriting AD structure | Technical Support John Nordmann | | a month ago |
| ☑ Testing av verification after change | Technical Support Rob Eng | | a month ago |

✎

📋 NOTE
Completed and verified ok. Took 1 day extra to complete.

✎

↩ ROLLBACK PLAN
John will perfom backup.

✎

⚠ RISKS

| | PROBABILITY | IMPACT | RISK VALUE |
|---|---|---|---|
| Ensure that right GPO is set | 100% | 10 | 10 |
| | Total | 10 | |

✎

# Header

The change header consists of two sections: an upper and a lower section.



## Upper section



The upper section contains information about the person who requested the change, which company the requester works for and the change request id. The **Save** button is disabled until you have made changes to the request.
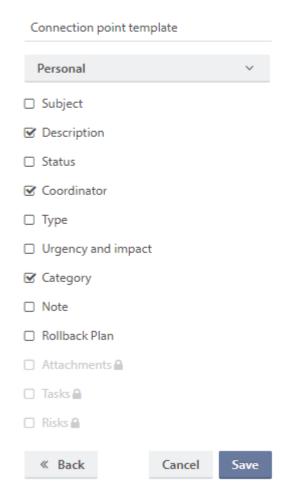
### Change templates

Click the ⚡ to either apply or create a new template.When you apply a template to a change, any information saved to the template will override the current change. When creating a new template, you select what information from the current change you wish to save to the template.

.
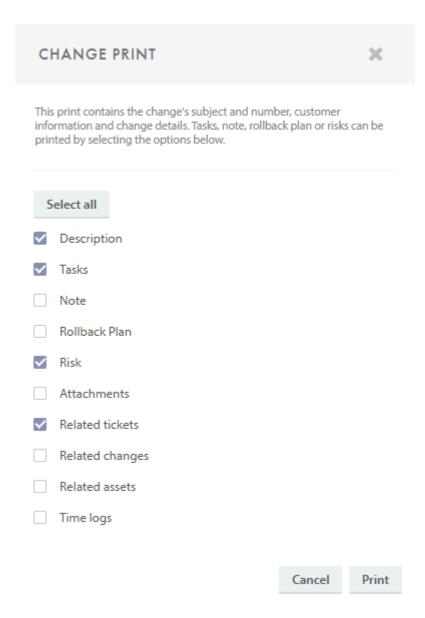
**SAVE CHANGE AS NEW TEMPLATE**

Here you can give your template a new name
and decide which fields it should contain. Make
sure all the data you want is already filled in
BEFORE you complete this step and click save.

Connection point template

| Personal ⌄ |
| --- |

☐ Subject

☑ Description

☐ Status

☑ Coordinator

☐ Type

☐ Urgency and impact

☑ Category

☐ Note

☐ Rollback Plan

☐ Attachments 🔒

☐ Tasks 🔒

☐ Risks 🔒

| « Back | Cancel | Save |
| --- | --- | --- |

## Print

Click the 🖨 button to print out select information about the change.

**CHANGE PRINT**                                    ✕

This print contains the change's subject and number, customer information and change details. Tasks, note, rollback plan or risks can be printed by selecting the options below.

Select all

☑ Description

☑ Tasks

☐ Note

☐ Rollback Plan

☑ Risk

☐ Attachments

☑ Related tickets

☐ Related changes

☐ Related assets

☐ Time logs

Cancel     Print

# Lower section

|                     |   | IMPLEMENTING ˅ |
|---------------------|---|----------------|
| Kristian Smith      |   |                |
| Hardware update economics department |   | Rob Eng |

The lower section contains information about the user who requested the change, the request subject, status, and change request coordinator.

## Requester

If you click on the name of the requester, a small window with his/her contact information appears.

christine lauvette

🏷 Head of support
📄 Syscom AS
✉ administrator@pureservice.local

It is possible to switch requester. Simply do so by clicking on the pencil ✎ .
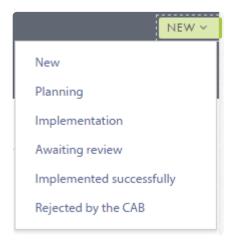
christine lauvette
🏷 Head of support
🖥 Syscom AS
✉ administrator@pureservice.local

Christine Lauvette        ▾  ➕

You can search for a user, find a user in the drop-down list or create a new user.

To open the users' profile page and make changes to his/her contact information, click on the arrow ➦ . You can read more about the user profile page in the next chapter: Contacts: User profile page.

## Status
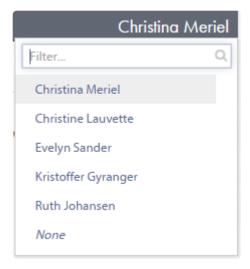
It is easy to change the status on a change request. Simply click on the status field in the top-right corner, and a drop-down list with available options will appear.

NEW ⌄

New

Planning

Implementation

Awaiting review

Implemented successfully

Rejected by the CAB
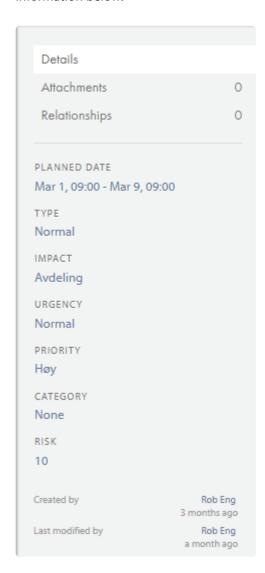
## Coordinator

The coordinator field is automatically set to **None** when you create a new change request. Clicking on the field will open a drop-down menu with a list of agents you can set as coordinator. A change request can be assigned to an agent by typing the name, or by navigating through the menu.

# Sidebar

The sidebar consists of two areas: the center content menu at the top, and the change request classification and information below.
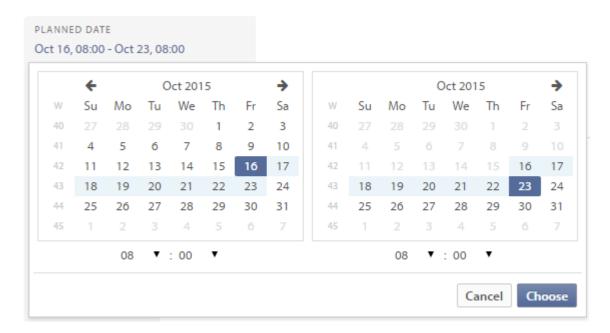


## Content menu

This menu changes the content displayed in the center of the ticket page. You can switch between **details**, **attachments** and **relationships**.

## Change classification and information

If necessary, you can make changes to the change request classification here. **Impact** and **Urgency** work as described in the previous chapter. At the bottom of the sidebar you will find information regarding when the change was created, modified, implemented and closed.

## Planned date



It is possible to set a planned start date and end date for the change request. Click on "Planned date" to open the calendar and set suitable dates.

## Priority

The priority is set based on chosen impact and urgency. It is not possible to change the priority directly; you have to make changes to the impact and urgency.

## Category

Category can be changed after an change is created. Change categories can also be sorted in lists and filters for example.

## Risk
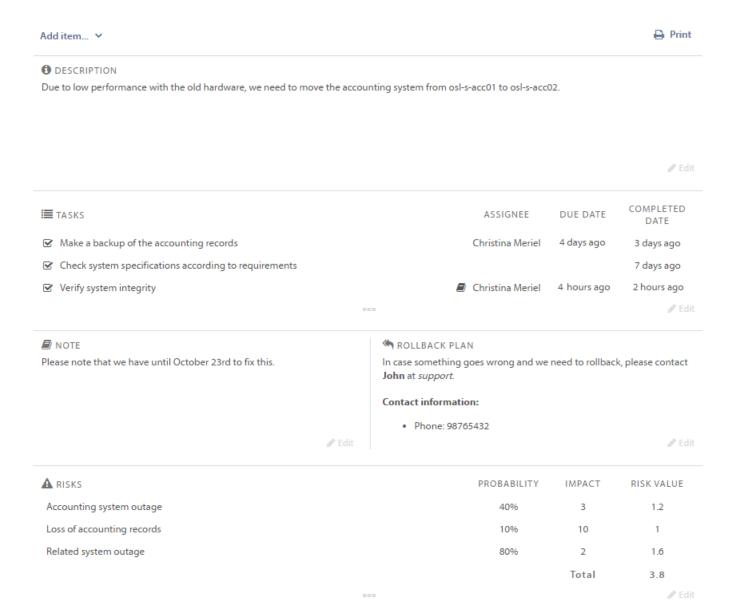
"No risks added" will be displayed in the risk field until you add a risk, as illustrated in the picture above. Each risk you add has a risk value. All of the values are added up and displayed in the risk field. The next chapter explains how to add risks.

# Center content
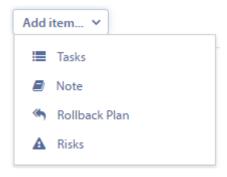
As mentioned in the previous chapter, the content displayed in the center depends on the option chosen in the content menu (details or attachments).

# Details

Choosing the **details** option in the content menu, opens a view where you can read and edit the description, and add items.

Add item... ⌄                                                                            🖶 Print

**ⓘ DESCRIPTION**

Due to low performance with the old hardware, we need to move the accounting system from osl-s-acc01 to osl-s-acc02.

✎ Edit

| ☰ TASKS | ASSIGNEE | DUE DATE | COMPLETED DATE |
|---|---|---|---|
| ☑ Make a backup of the accounting records | Christina Meriel | 4 days ago | 3 days ago |
| ☑ Check system specifications according to requirements | | | 7 days ago |
| ☑ Verify system integrity | 📓 Christina Meriel | 4 hours ago | 2 hours ago |

✎ Edit

**📓 NOTE**

Please note that we have until October 23rd to fix this.

✎ Edit

**↰ ROLLBACK PLAN**

In case something goes wrong and we need to rollback, please contact **John** at *support*.

**Contact information:**

- Phone: 98765432

✎ Edit

| ⚠ RISKS | PROBABILITY | IMPACT | RISK VALUE |
|---|---|---|---|
| Accounting system outage | 40% | 3 | 1.2 |
| Loss of accounting records | 10% | 10 | 1 |
| Related system outage | 80% | 2 | 1.6 |
| | Total | | 3.8 |

✎ Edit

# Add items

Add item... ⌄

| | |
|---|---|
| ☰ | Tasks |
| 📓 | Note |
| ↰ | Rollback Plan |
| ⚠ | Risks |

There are four different types of items: tasks, note, rollback plan and risks. It is only possible to add *one* of each type.

✳ Please note that you have to press the save button in the change header for each item you add, otherwise the items will be lost when the page is refreshed.

## Tasks

Working with a change often means that you have to solve certain tasks before the change is fully implemented. The first item can be used to delegate tasks and responsibility to agents, or as a checklist to see how far along the change has come.

You have to fill out a description, in order to add a task. In addition, you can assign the task to an agent, and set a due date.
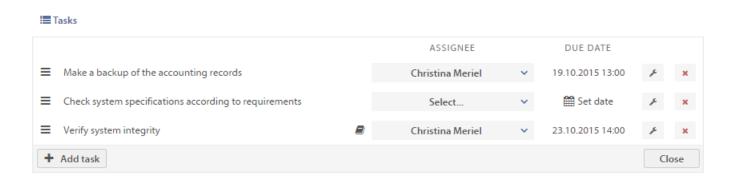
Click on the wrench icon ⚒ to add a note on a task. Tasks with notes are indicated with a notebook icon to the right of the description field.

To delete a task, press ✖ .

### Edit tasks

You can edit all of the task fields.
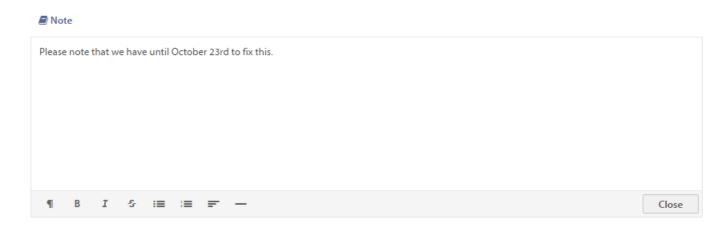
If a change has two or more tasks, you can easily rearrange their order. Simply drag-and-drop a task by the leftmost icon ☰ , to a desired position.

**Complete a task**
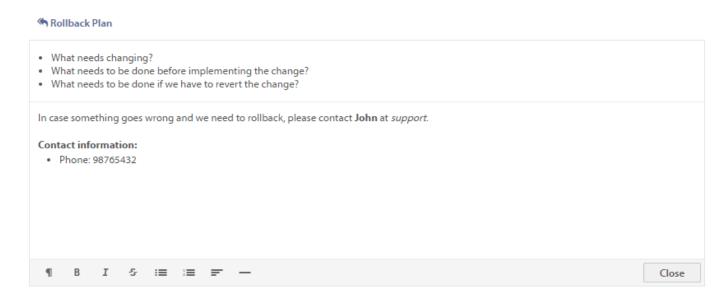
After you have finished a task, check it off to mark it as completed. Unless you are the change coordinator, you can only complete tasks that have been assigned to you.

# Note

Choose **note** from the item list to add an internal note to the change request. It is *not* possible to send messages to users from Pureservice when working with change requests, unlike when working with tickets.

# Rollback plan

It is important to have a rollback plan when you are working with changes. If something goes wrong, agents and administrators can easily see information like:

- what needed to be changed
- what needed to be done before implementing the change
- how to revert the change and who to contact

# Risks

Change requests might involve certain risks. Pureservice lets you expose these risks with the risk list. You should **describe** each risk, and determine the **impact** and **probability**.



**Impact** says something about how severe the risk is, and is a number between 1 (insignificant) and 10 (very severe). The **probability** is in percentage (10, 20, 30, 40, 50, 60, 70, 80, 90 or 100) and says something about the likelihood of the risk coming true. For each risk, the impact and probability values are multiplied, and make up the **risk value**.



If a change request has several risks, the risk values are summed up to a **total risk**. The total risk is displayed in the sidebar.

# Print change content

You can print the change content by clicking the  🖨 Print  button in the top right of the details overview. From there you select what content you wish to include in the print (Description, Tasks, Note, Rollback Plan, Risk, Attachments and/or Related assets), and finish by clicking Print.

# Attachments

Choosing the **attachments** option in the content menu opens the ticket's attachments. Here, you can add, preview, download and delete attachments.

## Add file

You can add an attachment in one of two ways: press **Add file** and browse the file system for the file, or drag-and-drop the file from a folder to the center content section. Below is a picture that illustrates how to drag-and-drop a file.



Pureservice will let you know if you are outside the drag-and-drop boundaries, by replacing  with a forbidden sign  .

## Preview

To preview an attachment, click on the thumbnail. The attachment will be displayed centred on your screen and in full-size.

## Download

If you want to download an attachment to your local machine, simply click on the file name.

## Delete

Hover over an attachment until a delete button appears. Click on the button to remove the attachment from the ticket.

**Add file**

**How to transfer accounting system**
83 kB · from · 17 minutes ago
How to transfer accounting system.pdf

**Delete**

# Time logs
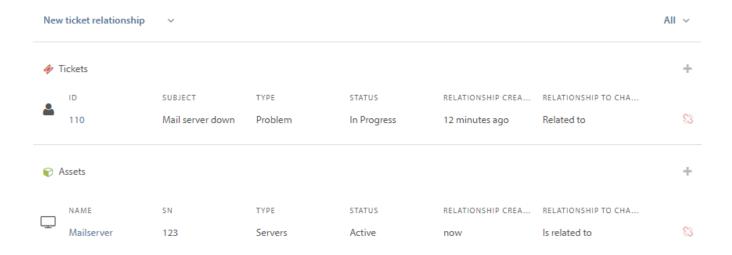
Time logs allows you to register how long is spent on the change. It can be a single log, or multiple. Select **Add time log** to create a new log.

Select **Details** in order to open a text box where you can give more information on how the change was performed and any other relevant details

| SUMMARY | HOURS | MINUTES | COMPLETED | COMPLETED BY | DETAILS | | |
|---------|-------|---------|-----------|--------------|---------|---|---|
| Access point changed | 1 | 30 | 13.06.2019 | Kristian Administ... ⌄ | Details | ⌄ | ✖ |

# Relationships
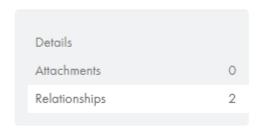
Choosing **Relationships** in the Sidebar shows you tickets and assets related to this change.
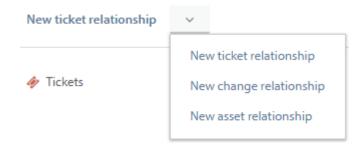


To remove a relationship, click the  button next to the relationship.

The numbers to the right in the sidebar shows you the how many items are related to the change.

# New relationships
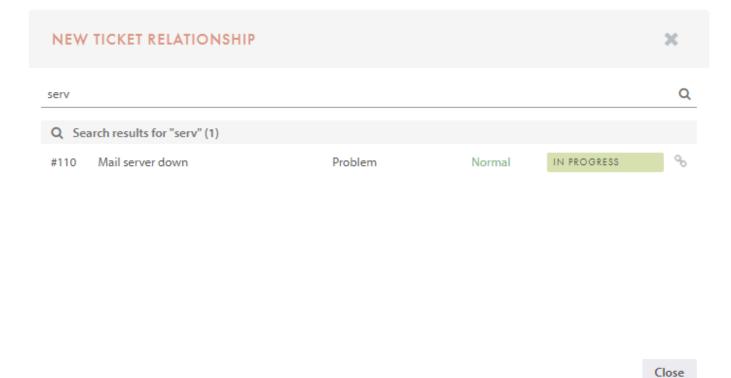
Relate new items by clicking the ✚ button or by choosing type of relationship from the top menu.
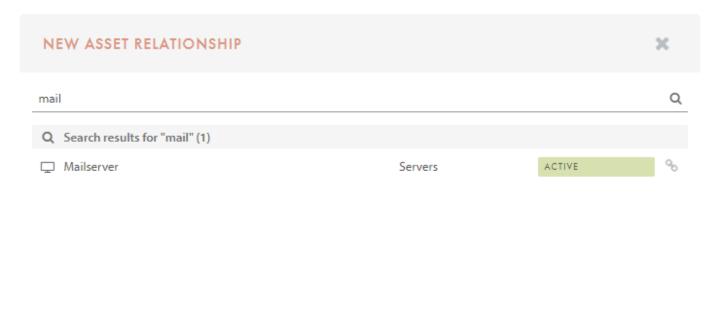


Search for tickets to relate by searching for the ticket subject.



You can also relate to other changes.

**NEW CHANGE RELATIONSHIP** ✖

| server | 🔍 |

🔍 Search results for "server" (1)

| #2 | Upgrade email server | Normal | Low | NEW | 🔗 |

Close
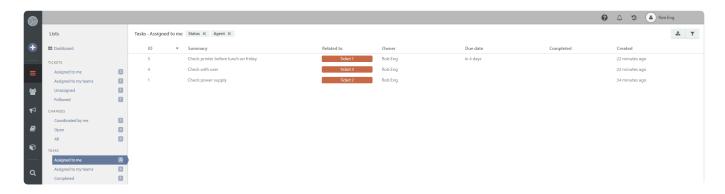
Or you can relate to assets.

**NEW ASSET RELATIONSHIP** ✖

| mail | 🔍 |

🔍 Search results for "mail" (1)

| 🖥 Mailserver | Servers | ACTIVE | 🔗 |

Close

# Tasks

It is possible to add tasks to Changes and Tickets. Pureservice uses a set of predefined lists to separate tasks into groups. The task lists are located beneath the change lists in the list menu.
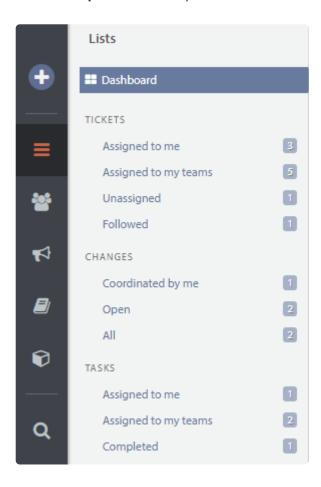


Please see *Tickets -> Working with a ticket -> Center content -> Tasks* for details on how to create tasks.

# List menu

Tasks are sorted into predefined lists in the list menu:

- **Assigned to me**: tasks assigned to the logged in user
- **Assigned to my teams**: tasks assigned to the team(s) you are a member of
- **Completed**: all completed tasks



Pay attention to the number to the right of every list heading, as it indicates how many elements there are in that particular list.
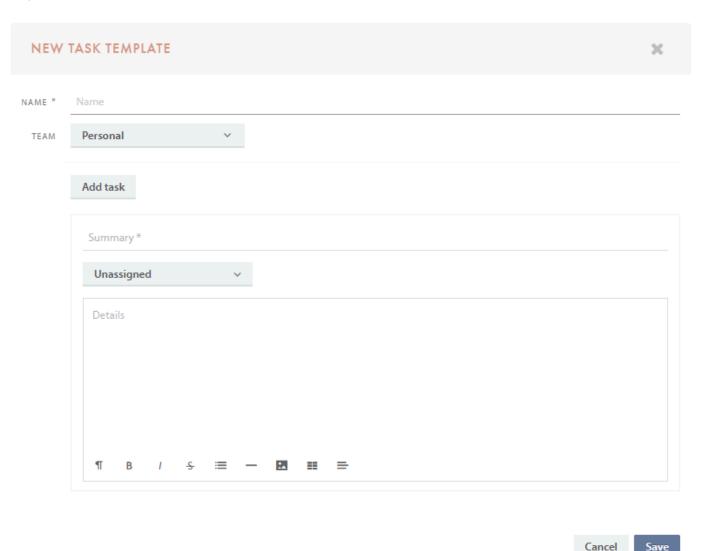
# Select task template

When you create a new task in Pureservice, you can choose to fill out the task by selecting a template. Working with templates might help speed up the registration process, as it fills out fields in the form for you. In an existing ticket, press the template button to see which templates you can select.

The templates are listed in the following order:

- Personal templates
- Templates from your default team
- Templates from other teams that you are a member of

The summary, assignee and details are added to new tasks if you choose a template that contains these elements. You may edit all three elements.

# List functions

The task lists, like the ticket and change lists, have several important functions: customizable list view, resizable columns, column sorting, indications of unsaved changes, download list (as CSV file) and a filter to create custom lists. All of the functions are discussed in the following subchapters. Elements in task lists are automatically updated if modified by someone else.
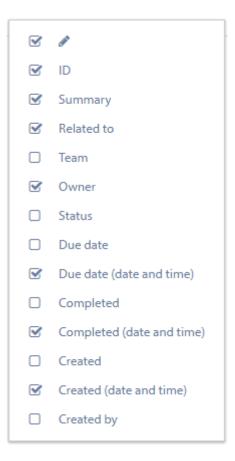


A task can be completed directly from the task list by right clicking and selecting *Mark as completed*. This can also be done by selecting multiple tasks.



# Cusomizable list view

You can customize the list view by choosing which columns you want to see. The column menu appears when you right click on a column header.

# Resizable columns

To move a column, drag an drop the column.



To resize a column, simply drag the column to the desired width.



# Column sorting
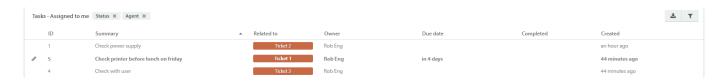
Left click on the column header you want to sort the tasks by. A small icon indicates which order the column is sorted by. Ascending: , descending: .



# Unsaved changes

The pencil icon , in the leftmost column, indicates if a task has any unsaved changes. In addition, parts of the row, such as **Summary**, **Created by**, **Created**, **Status** and **Due date**, are highlighted.
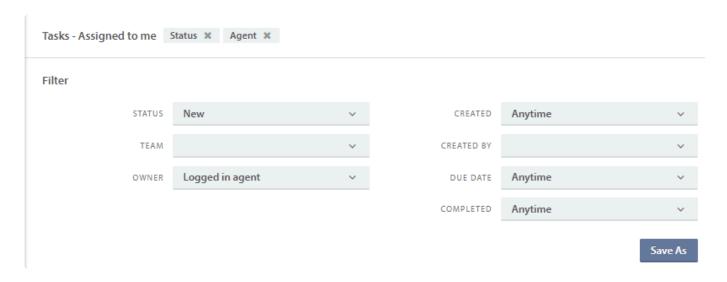


# Download task list

You can download the list you are currently viewing or working on, by clicking  in the upper right corner. The list will be downloaded as a CSV file, and can be opened by programs such as Microsoft Excel. All columns are included in the downloaded file, even the ones that are hidden in the Agent Console.

# Task filter

Each predefined task list has a default filter applied to its record set. It is also possible to create custom filters and lists, or temporarily edit the default ones. Click [filter icon] to open the filter menu. To close the menu, click on the filter button again.
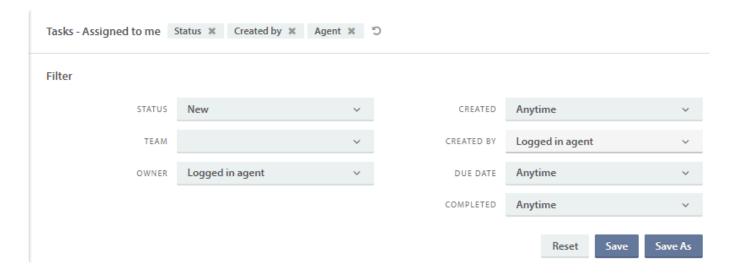
You can filter tasks based on **status**, **team**, **owner**, **created**, **created by**, **due date** and **completed**

## Edit a default filter

Each default filter comes with a set of predefined values. Simply click on the drop-down lists to select the options (one or multiple) that are best suited for your list. Once you have made changes to a default filter, a "Reset" button appears to the left of the "Save As" button. Click on the "Reset" button to undo changes.

Changes made to a default filter are only temporary. To save the changes, you have to create a new personal list.

## Create a new personal list

To create a custom-made personal list, select an existing list as a baseline for the new one and open the filter menu. You can either make changes to the chosen filter before saving it as a list, or edit the personal list after it has been created.

Clicking "Save as" will open a modal window where you can enter a unique list name, and create the list.

Press "Add" to create the list.

Custom-made lists are visible beneath the predefined lists.

## Edit and delete an existing personal list

It is possible to edit both the filter values of a personal list and its name. You can also delete a personal list.

When you hover over a personal list, two new icons (a pencil and a cross) appear to the right of the list name.

To edit the list name, click on the pencil. Doing so will open a modal window, where you can rename the list.



To delete a personal list, click on the cross. You will have to confirm your choice in order to delete the chosen list.



In order to make changes to filter values, simply click on the custom-made list you want to edit. Make sure that the filter menu is open. Once you have made changes to the filter, you can choose to **reset** it, **save** and overwrite the existing list or **save as** a new list.

✱  The custom-made personal lists are located beneath the predefined lists. You can distinguish between these two types by hovering over them. The icons ✏ ✖ are only visible when hovering over a custom-made list.

## Unsaved changes

Changes made to a filter, belonging to either a default or a personal list, are stored in your browsers local storage until you save them. A star is displayed next to the list to indicate that the list has unsaved changes.

TASKS

| | | |
|---|---|---|
| Assigned to me | 0 | |
| Completed | 0 | |
| ✻ Tasks created by me & assi… | 0 | |

# Contacts

The contacts are divided into two lists: **users** and **companies**. These lists are again divided into two: enabled and disabled. The columns can be arranged in the same way as the ticket list columns, which we discussed in the chapter [Tickets: List functions](#)



## Customizable contact view
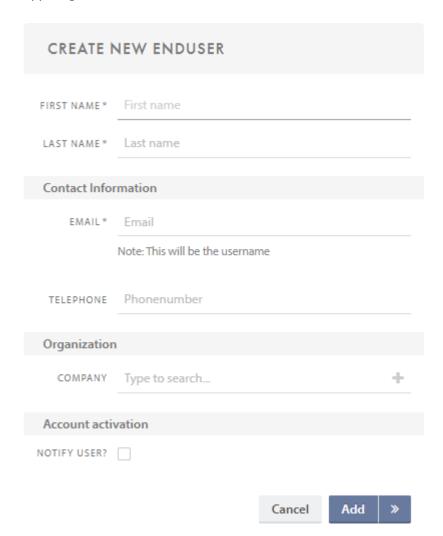
You can customize the contact list view by choosing which columns you want to see. The column menu appears when you right click on a column header.

- ☑ Company
- ☐ Created
- ☐ Created (date and time)
- ☑ Department
- ☑ E-mail
- ☐ First name
- ☐ Last name
- ☐ Leder e-post
- ☑ Location
- ☐ Modified
- ☐ Modified (date and time)
- ☑ Name
- ☑ Phone number
- ☐ Role
- ☐ Superuser
- ☑ Username

# Contact management

## Create new end user

To create a new end user, choose the **user** list (either enabled or disabled), and click on [+ New enduser] in the upper right corner.

### CREATE NEW ENDUSER

FIRST NAME *    First name

LAST NAME *    Last name

**Contact Information**

EMAIL *    Email

Note: This will be the username

TELEPHONE    Phonenumber

**Organization**

COMPANY    Type to search...    +

**Account activation**

NOTIFY USER?    ☐

[ Cancel ]    [ Add » ]

First name, last name and email are required fields, while telephone and company are optional.

✳ Please note that the email will be set as the username, and that you can choose to notify the user about the newly created Pureservice account.
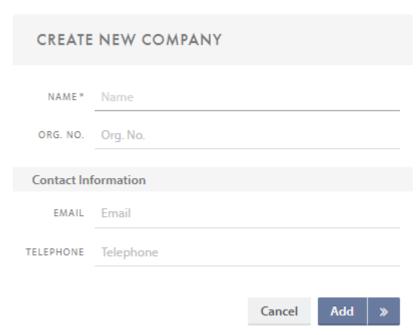
## Organization

If the company is already registered in the system, you can simply type the company name. Pureservice will search and give a list of matches. If the company is not registered in the system, you can click on the plus icon on the right side inside the search box. Doing so will open the "Create new company" modal window.

# Create new company
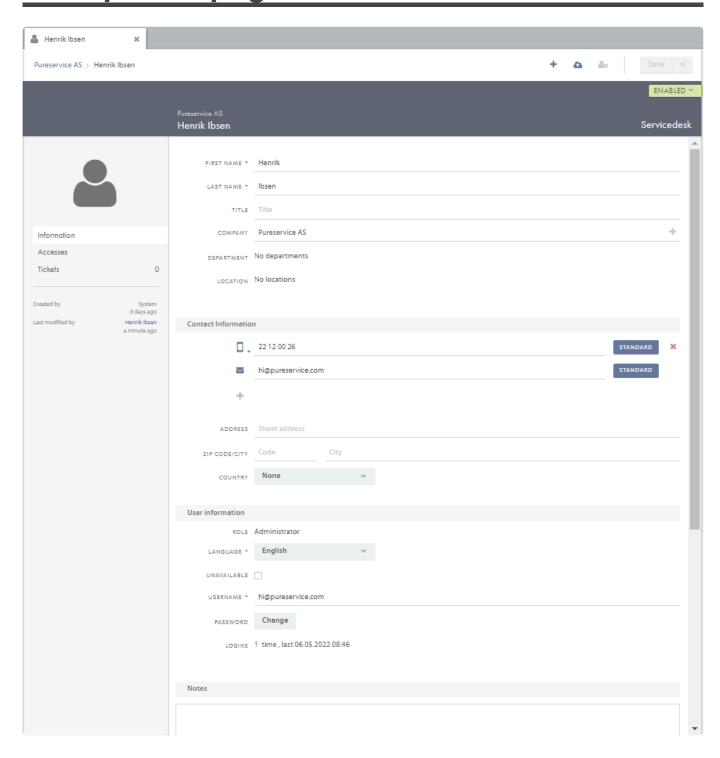
If you only want to create a new company, choose the **company** list (enabled or disabled) and click on the

**+ New company** button in the upper right corner. This will open the "Create new company" modal window.

**CREATE NEW COMPANY**

NAME *     Name

ORG. NO.     Org. No.

**Contact Information**

EMAIL     Email

TELEPHONE     Telephone

Cancel     Add »

**Name** is required, while **org.no**, **email** and **telephone** are optional.

# User profile page



## User lookup

You can also open the user's profile page directly by using this URL (changing the first URL path and user information):

Phone number URL will look like this:
URL/app#/lookup/user/?phonenumber=xxxxxxxx

Email lookup URL will look like this:
URL/app#/lookup/user/?username=xxxxxxxx

The username lookup URL will look like this:

/app#/lookup/user/?email=xxxxxx@yyyyyy.com

These will open the user's access, ticket page and assets respectively:

URL/app#/lookup/user/?phonenumber=xxxxxxxx&section=tickets

URL/app#/lookup/user/?email=xxxxxxxx@yyyy.com&section=accesses

URL/app#/lookup/user/?username=xxxxxxxx&section=assets

Phone number, email and username can be user interchangeably in these links.

If more than one user has the specific information, you will see a list of all the users

# Header

## Create ticket

By clicking the **Create ticket** button ![+] you can create a new ticket request on the user.

## Upload profile picture
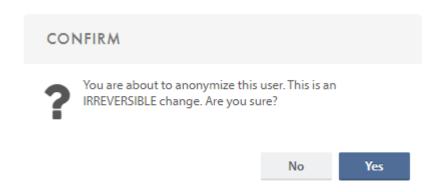
By clicking the **Upload profile picture** button ![upload] you can upload a profile picture for the user.

## Anonymize user
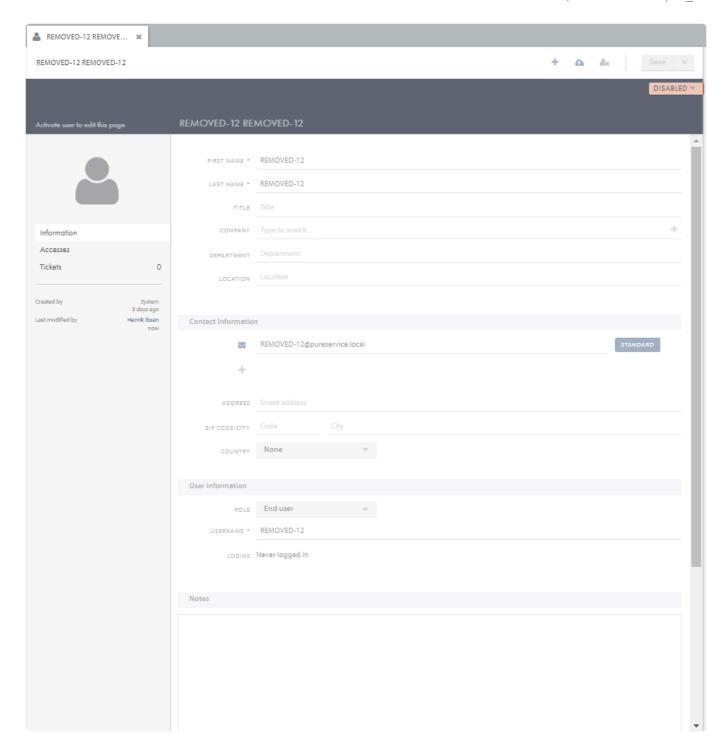
> ✳ Anonymizing a user does not delete the user's tickets. If desired, please do so before anonymizing the user. If the user is agent or administrator, we recommend that you demote the user to end user before anonymizing.

According to GDPR, you should be able to anonymize users. By clicking the **Anonymize user** button ![anonymize] , you will see a warning message.

**CONFIRM**

? You are about to anonymize this user. This is an IRREVERSIBLE change. Are you sure?

No   Yes
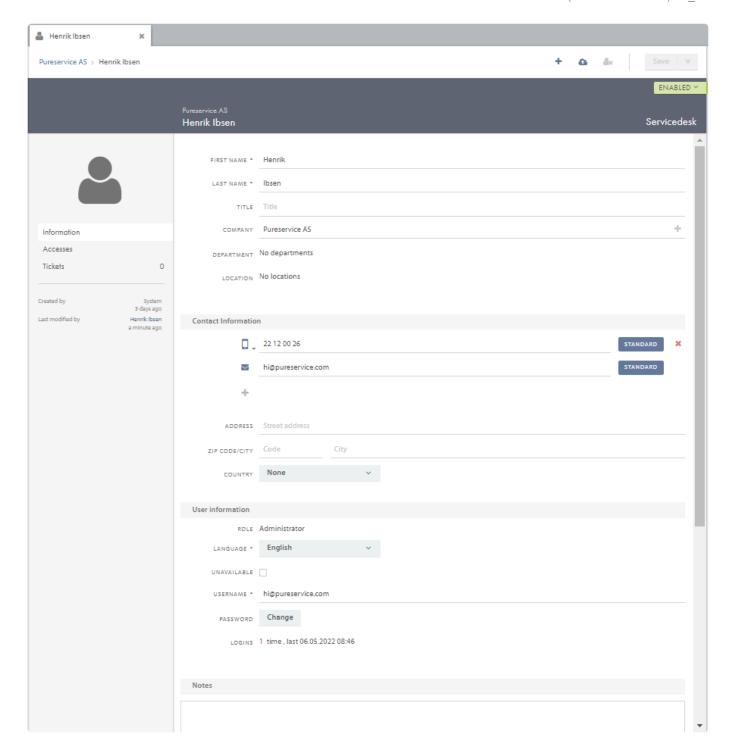
By confirming this, the user's first name, last name, email addresses, phone numbers and user name will be anonymized. All other contact information will be deleted.

Remember to save the user for changes to take effect.

## Teams
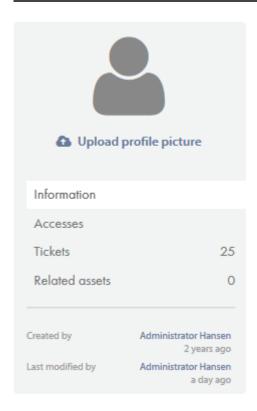
As displayed in the picture at the top, end users cannot be members of teams, only agents and administrators can. If Carlos Adams (the user from the picture at the top) were an agent, the profile page would look different. Here is an example of how his profile page could look like to another logged in agent:

If the user is an agent or administrator, you will be able to see which team(s) he/she is a member of. Click on the "team" area in the upper right corner to view a list of the teams.

# Sidebar

Information
Accesses
Tickets      25
Related assets      0

Created by      Administrator Hansen
2 years ago
Last modified by      Administrator Hansen
a day ago

## Upload profile picture

Click "Upload profile picture" to select an image to upload as the user's profile picture.
This can also be imported from Active Directory if the Pureservice installation is OnPremise and an Administrator has set up the relevant import.
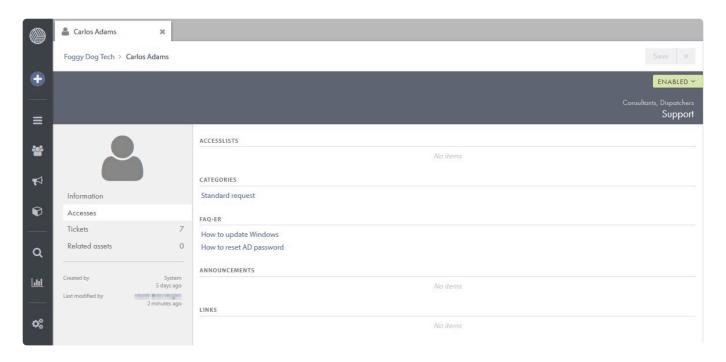
## General

See the "Center content"-page.

## Accesses

You can see a user's effective accesses in the Accesses view to the left.
Here you can see their access to Accesslists, Categories, FAQs, Announcements and Links.

## Tickets

See the tickets the relevant user is set as the end user.
Also includes some useful information such as ticket age, status and priority.
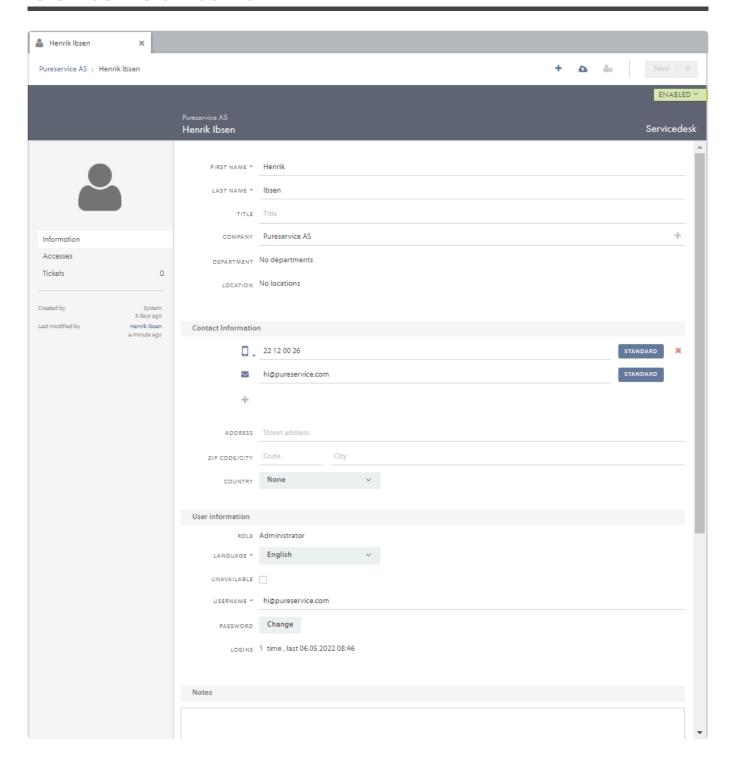
## Related assets

See all the assets that are currently related to the user.
You can also relate the user to assets by searching for one (search box in the top left) and clicking on the relevant result.

# Center content



## Department and Location

If the user is connected to a company with predefined departments and locations, you can choose department and location from a dropdown list. If no departments or locations have been defined on the company profile page, or the user is not connected to a company, this information can be filled in manually.
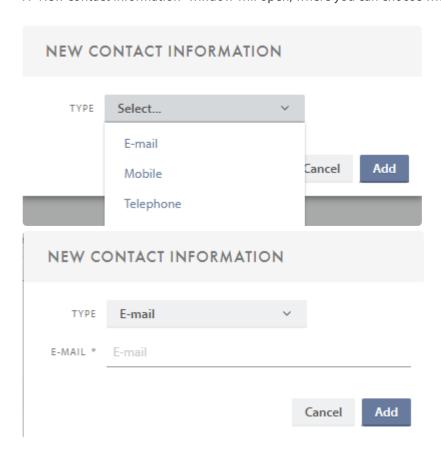
## Contact information

The contact information section contains basic information about the user. The email used when creating the user, is automatically set as the default contact type. To add new information, such as a new email address, click on the "+".
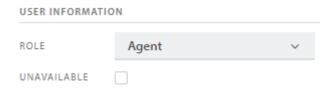


A "New contact information" window will open, where you can choose which information type to add.
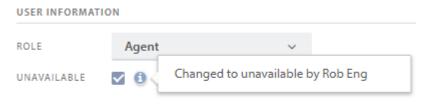
If a user has two or more of the same contact type, you can choose which one is the default one. A default email address cannot be deleted, as it is mandatory for a user to have at least one email registered. Pureservice uses the default email to communicate with the user. A default telephone or mobile number, on the other hand, can be deleted, as Pureservice does not have to use these contact types when communicating.

## User information

This section, except for the password field, is for administrators only. Here you can change the role of the user (Enduser, Agent, Administrator or Zoneadministrator). You can also set the user unavailable. In assignment and case assignment, it will show (unavailable ) behind the name. In the workflow builder there are criterias and actions associated with this setting.



There will also be information about who changed the availability of the user as well as a notification if you degrade the user's role.



## Password reset

When clicking the password reset button, a password reset mail will be sent to the user's default email. This makes it possible for a user to get access to the application, even if he/she has forgotten the password.
If you are logged in as an agent, the **Reset** password button is *only* visible when inspecting an end user's profile page. The button is *not* visible when viewing the profile page of another agent or an administrator. Please note that this only applies for agents, not administrators. The reset button is always visible for administrators.

# Viewing your own profile
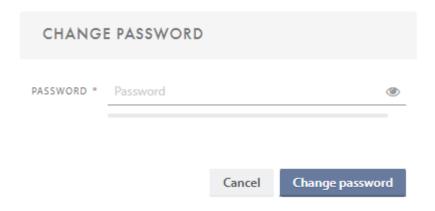
Your own profile page will look slightly different from when you look at another user's profile page.

## User information

When viewing your own profile page, the **User information** section will look a bit different. Instead of a reset password button, you will see a **Change** password button.

USERNAME *     harold.matthews

PASSWORD     **Change**

LOGINS     40 times, last 07.12.2018 12:31
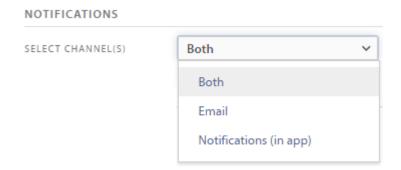
Pressing the button opens a modal window, where you can change your password.

**CHANGE PASSWORD**

PASSWORD *     Password     👁

Cancel     **Change password**
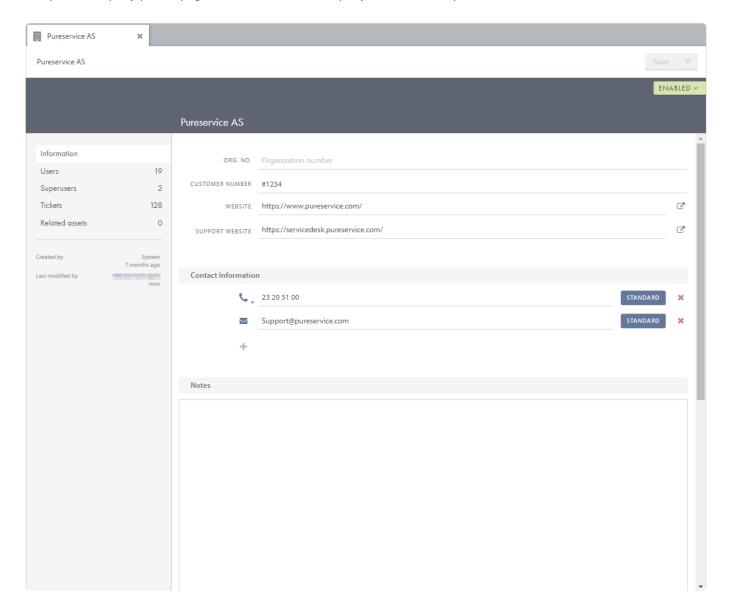
## Notifications

When viewing your own profile page you can change Notifications settings (only you can change your own Notification settings). It is possible to receive notifications from Pureservice on **email** and/or in the **notification centre**. The default choice is **both**, meaning that you will get notifications in the application and sent to you default email, unless you make any changes to you profile.

**NOTIFICATIONS**

SELECT CHANNEL(S)     Both     ⌄

Both

Email

Notifications (in app)

# Company profile page

To open a company profile page, double click on a company from the "Companies" list in the Contacts view.



The view can be divided into three sections:

# Header

## Save

Changes made to the company page must be saved with this button.

## Company name

You can edit the name by clicking on the current name.

## Status

Select between the statuses Active and Inactive. An inactive company will not be usable, but can be made active again at any time.

# Sidebar

## Information

Contains all the information regarding the company

## Users

Overview that contains all the users that belong to the relevant company.

## Tickets

See all tickets the company's users are set as the end users.
Also includes some useful information such as ticket age, status and priority.
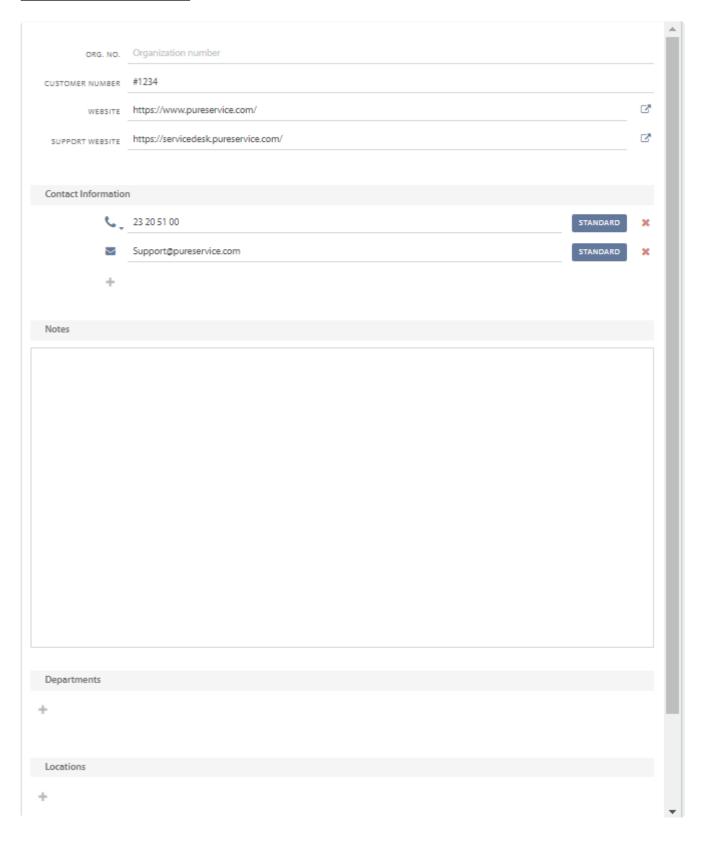
## Related assets

See all the assets that are currently related to the company.
You can also relate the company to assets here by searching for one (search box in the top left) and clicking on the relevant result.

# Center content

| | |
|---|---|
| ORG. NO. | Organization number |
| CUSTOMER NUMBER | #1234 |
| WEBSITE | https://www.pureservice.com/ |
| SUPPORT WEBSITE | https://servicedesk.pureservice.com/ |

**Contact Information**

| | | |
|---|---|---|
| ☎ | 23 20 51 00 | STANDARD ✖ |
| ✉ | Support@pureservice.com | STANDARD ✖ |
| + | | |

**Notes**

**Departments**

+

**Locations**

+

It is only mandatory to enter a company **name** when you create a new company, as described in Contact management.
**Org.no**, **email** and **telephone** are optional values. The three latter values can be added to the company profile page after you have created the company. In addition, you can add information like **Customer no.**, **Website** and **Support website** to the company profile page.

# Website and Support website

If a company has a website and/or support website added to its profile page, you can open the link in a new tab by clicking on the "open link" icon [↗] .
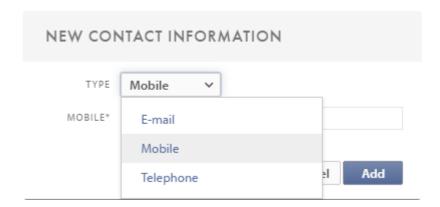
| WEBSITE | https://www.pureservice.com/ | ↗ |
|---------|------------------------------|---|

# Contact information

The contact information section contains basic information about the company.



To add new contact information, click on the "+".



If a company has two or more of the same contact type, you can choose which one is the default one.

A default email address, telephone or mobile number can be deleted, as Pureservice does not have to use these contact types.

# Departments and Locations

You can add departments and locations on the company profile page to allow easier configuration and prevent typos. By doing this, you can choose department and location from a dropdown list on the user profile page.

# Announcements
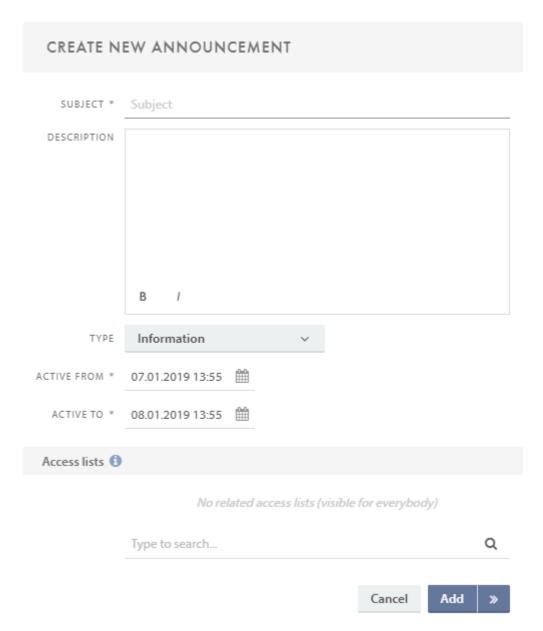
Announcements can be used to inform end users in Selfservice, for example when there are known problems, and is a great way of reducing the load on the service desk.

The active period decides whether the announcement is Active or Inactive, and you can delete unwanted announcements by either right-clicking the announcement in the list and clicking Delete or by opening the announcement's page and clicking the Delete button in the top right corner.



## Create a new announcement

You can create a new announcement by clicking the "New announcement" in the top-right corner.

# Type

There are three different types of announcements:
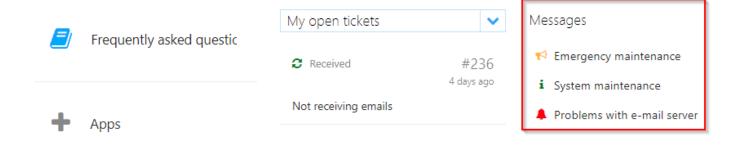


# Access Lists

To limit who can see the announcment you can use Acces lists. Access lists are lists of specific users which you define in Admin -> Selfservice -> Access Lists.

# Announcements in Selfservice

Only active announcements are displayed in Selfservice. The different announcement types have different colours and icons, as shown in the picture below.
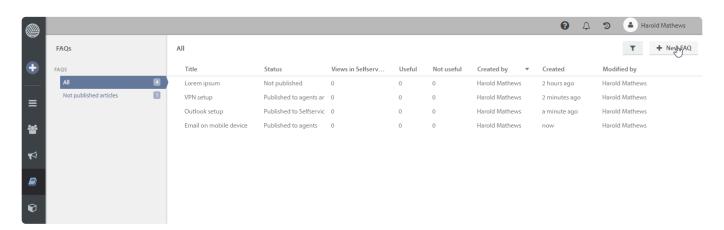
# FAQs

sp(banner tip). FAQ needs to be activated in the Administrator Console before use

There are often recurring questions when working in a service desk. Under **Frequently asked questions (FAQ)** you can post articles answering these commonly asked questions.

Sorting the articles into different lists will make the administration easier. You can create your own lists by clicking on the filter icon in the upper right corner. You can read more about the FAQ article filter in the subchapter List functions – FAQ filter.



The only predefined list in the list menu is:
- All: this list shows all your FAQ articles
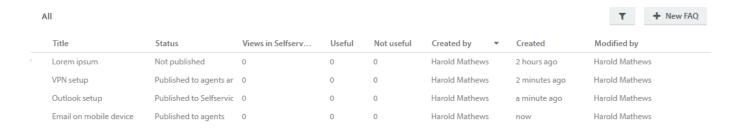


The number to the right of every list heading indicates how many articles there are in the list.
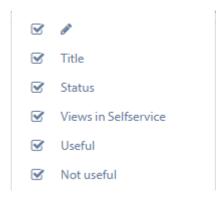
# List functions

The FAQ lists have several important functions: customizable list view, resizable columns, column sorting, indications of unsaved changes and a filter to create custom lists. All of the functions are discussed in the following subchapters.

| All | | | | | | | | ▼ | + New FAQ |
|---|---|---|---|---|---|---|---|---|---|
| Title | Status | Views in Selfserv... | Useful | Not useful | Created by | ▼ | Created | Modified by | |
| Lorem ipsum | Not published | 0 | 0 | 0 | Harold Mathews | | 2 hours ago | Harold Mathews | |
| VPN setup | Published to agents ar | 0 | 0 | 0 | Harold Mathews | | 2 minutes ago | Harold Mathews | |
| Outlook setup | Published to Selfservic | 0 | 0 | 0 | Harold Mathews | | a minute ago | Harold Mathews | |
| Email on mobile device | Published to agents | 0 | 0 | 0 | Harold Mathews | | now | Harold Mathews | |

## Customizable list view

You can customize the list view by choosing which columns you want to see. The column menu appears when you right click on a column header.

☑  ✏️

☑  Title

☑  Status

☑  Views in Selfservice

☑  Useful

☑  Not useful

## Resizable columns

Simply click on the divider between two column headers and drag to the desired position, to resize the column width.

| Title | Status |
|---|---|
| Client Hardware | Published to Selfservice |

## Column sorting

Left click on the column header you want to sort the articles by. A small icon indicates which order the column is sorted by. Ascending: ▲ , descending: ▼ .

| | Title | Status | Views in Selfservice | Useful | Not useful | Created |
|---|---|---|---|---|---|---|
| | Client Hardware | Published to Selfservice | 9 | 0 | 0 | a month ago |
| | Client Software | Published to Selfservice | 0 | 0 | 0 | a month ago |
| | Hvordan opprette fornuf... | Published to Selfservice | 11 | 1 | 0 | 18 days ago |
| | Install | Published to Selfservice | 0 | 0 | 0 | a month ago |
| | Kategoritags | Published to Selfservice | 0 | 0 | 0 | 14 days ago |

## Unsaved changes

The pencil icon , in the leftmost column, indicates if an article has any unsaved changes. In addition, the whole row is highlighted.

| | Title | Status | Views in Selfservice | Useful | Not useful | Created |
|---|---|---|---|---|---|---|
| | Client Hardware | Published to Selfservice | 9 | 0 | 0 | a month ago |
| ✏ | **Client Software** | **Published to Selfservice** | **0** | **0** | **0** | **a month ago** |
| | Hvordan opprette fornuf... | Published to Selfservice | 11 | 1 | 0 | 18 days ago |
| | Install | Published to Selfservice | 0 | 0 | 0 | a month ago |
| | Kategoritags | Published to Selfservice | 0 | 0 | 0 | 14 days ago |

## Delete Faq
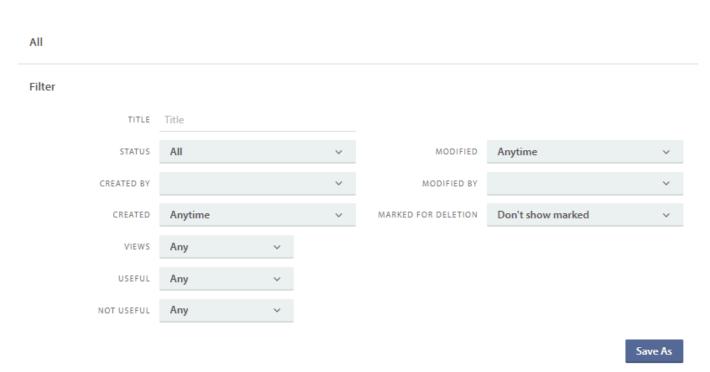
Agents can mark FAQ articles for deletion to show the administrators that the marked article can be deleted. Agents cannot delete the article themselves, as this require access to the admin console.

To mark a article for deletion you need to right click one or more articles in the list and chose **Mark selected FAQ's for deletion**

# FAQ filter

Pureservice comes with one predefined FAQ list which shows all FAQ articles. You can create your own custom filters and lists, or temporarily edit the default one. Click [filter icon] to open the filter menu. To close the menu, click on the filter button again.
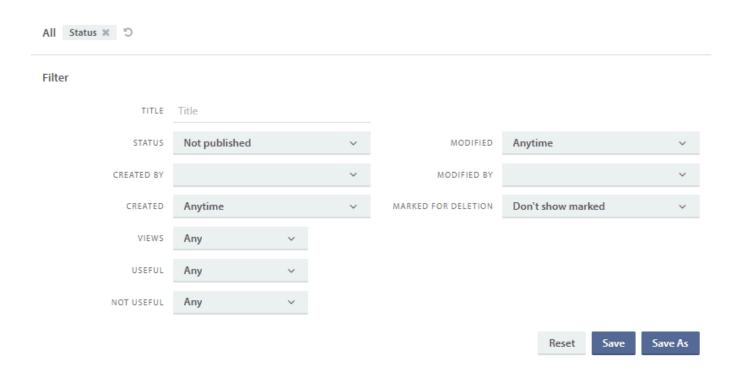


Pureservice lets you filter tickets based on **title**, **status**, **created by**, **created**, **views**, **useful**, **not useful**, **modified**, **modified by** and **marked for deletion**.

## Edit a default filter

The default filter comes with a set of predefined values. Simply click on the drop-down lists to select the options (one or multiple) that are best suited for your list. Once you have made changes to a default filter, a "Reset" button appears to the left of the "Save As" button. To undo changes you can either click on the cross on the filter value you want to reset [Useful ✕], or you can click on the **Reset** button under the filter values.

Changes made to a default filter are only temporary. To save the changes, you have to create a new list.

All  Status ✖  ↺

Filter

| | |
|---|---|
| TITLE | Title |
| STATUS | Not published ⌄ |
| CREATED BY | ⌄ |
| CREATED | Anytime ⌄ |
| VIEWS | Any ⌄ |
| USEFUL | Any ⌄ |
| NOT USEFUL | Any ⌄ |

| | |
|---|---|
| MODIFIED | Anytime ⌄ |
| MODIFIED BY | ⌄ |
| MARKED FOR DELETION | Don't show marked ⌄ |

Reset    Save    Save As

# Create a new list

To create a custom-made list, select an existing list as a baseline for the new one and open the filter menu. You can either make changes to the chosen filter before saving it as a list, or edit the personal list after it has been created. Clicking "Save as" will open a modal window where you can enter a unique list name, and create the list.

**CREATE NEW LIST**

| | |
|---|---|
| NAME * | Not published articles |
| PERSONAL? | ☑ |

Cancel    Add

By removing the tick in **Personal?**, the list will become public.

Press "Add" to create the list.

**FAQs**

FAQS

All                                       1

Not published articles          1

Custom-made lists are visible beneath the predefined lists.

# Edit and delete an existing list

It is possible to edit both the filter values of a list and the list's name, and you can also delete a list if you created it, or if you are an administrator.

When you hover over a list, three new icons appear to the right of its name.
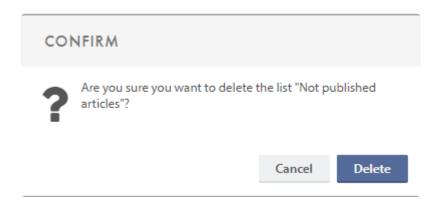
To reorder your lists, click the **reorder list** button and drag and drop the list to where you want it.
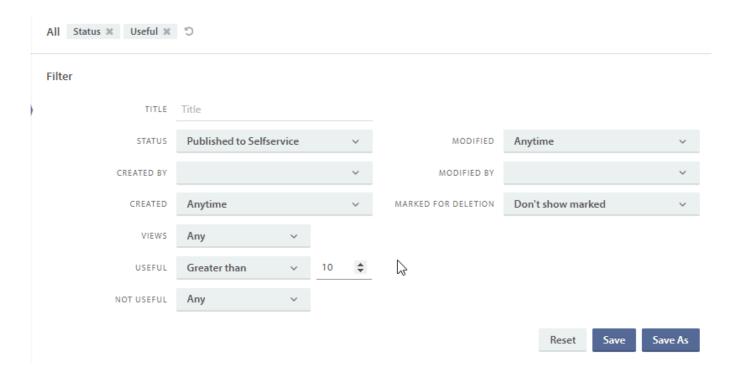
To edit the list name, click on the pencil. Doing so will open a modal window, where you can rename the list.

To delete a list, click on the cross. You will have to confirm your choice in order to delete the chosen list.

In order to make changes to filter values, simply click on the custom-made list you want to edit. Make sure that the filter menu is open. Once you have made changes to the filter, you can choose to **reset** it, **save** and overwrite the existing list or **save as** a new list.



# Unsaved changes

Changes made to a filter, belonging to either a default or a personal list, are stored in your browsers local storage until you save them. A star is displayed next to the list to indicate that the list has unsaved changes.
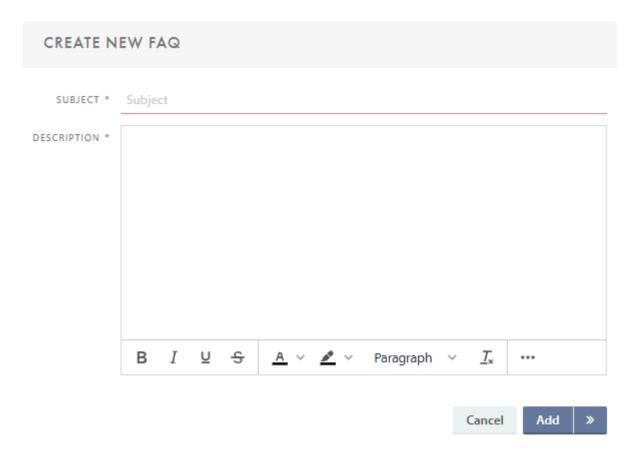
# Create new FAQ article

FAQ articles are created by clicking on the **New FAQ** button in the upper right corner.
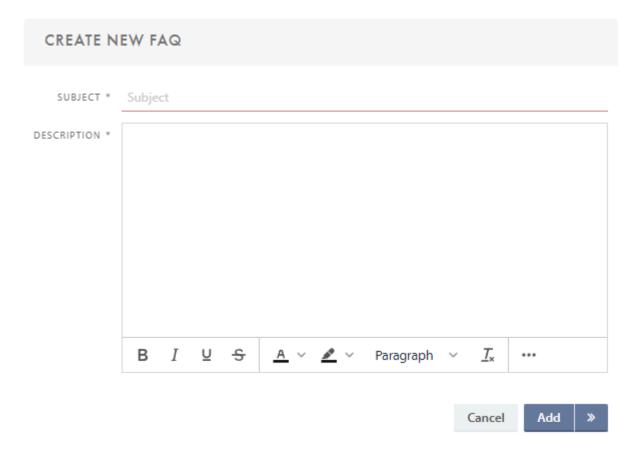


Clicking on the **New FAQ** button opens a modal window, where you can fill in the information needed to create an article.



## Faq article details

To create a new FAQ article, you will have to fill out the fields **Subject** and **Description**

CREATE NEW FAQ

SUBJECT *    Subject

DESCRIPTION *

B  I  U  S    A ∨  🖉 ∨    Paragraph  ∨    Iₓ    •••

Cancel    Add  »

Both fields are **mandatory**. Pureservice will mark mandatory fields that are empty with a warning message:

SUBJECT *    Subject

DESCRIPTION *    |    The field subject is required

## Create or cancel

Clicking the **Add** button saves the article. Clicking the arrow » next to the **Add** button saves and opens the article, so that you can continue to work on it. Clicking the **Cancel** button closes the **Create new FAQ** window. Content entered will be lost when cancelling the registration.

# Subject

SUBJECT *    Lorem ipsum
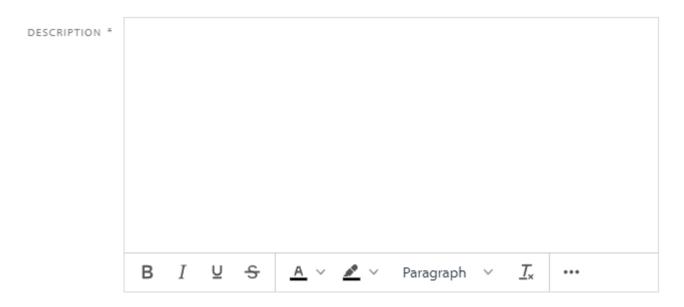
The content in the subject field is the same as in the **Title** column in the FAQ's list, and is supposed to give a short summary of the description.

| Title | Status |
|---|---|
| Lorem ipsum | Not published |

# Description

Fill in a suitable **description** of the article.

DESCRIPTION *

| B | I | U | S | A ⌄ | ✎ ⌄ | Paragraph ⌄ | I_x | ••• |

There is a tool line at the bottom, with the following functions:

B Bold    I Italic    U Underline    S Strikethrough    A ⌄ text color    ✎ ⌄ Background color

Paragraph ⌄ Formats    I_x clear formatting    ••• More    ≡ Align    ⇤ decrease indent    ⇥ increase indent    ☰ List    — horizontal line    🔗 Insert/edit link    ⊞ ⌄ Table    🖼 Insert/edit image
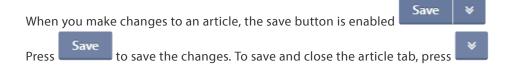
# Working with a FAQ article

## Header

The header contains the subject of the article and the status.



## Save (and close)

When you make changes to an article, the save button is enabled 

Press  to save the changes. To save and close the article tab, press 

## Status
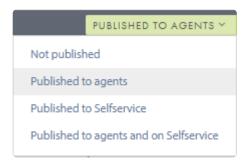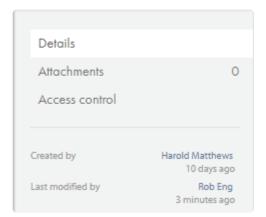
It is easy to change the status on a FAQ article. Simply click on the status field in the top-right corner, and a drop-down menu with available options will appear.



## Sidebar
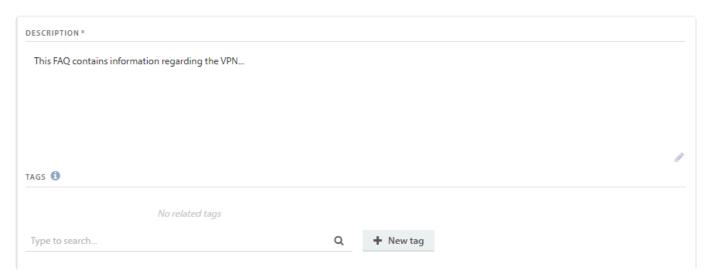
The sidebar consist of two areas: the content menu at the top, and information below.

# Details



Choosing the **Details** option in the content menu opens the article's details. Here you can write a description and add tags.

### Description
Fill in a suitable **description** of the FAQ article.

### Tags
Tags allow you to specify keywords that can be used to search for this FAQ. Category tags are set up by an administrator and will additionally group the FAQ under the given category tag on Selfservice. Search for available tags in the search box.

# Attachments

Choosing the **attachments** option in the content menu opens the FAQ article's attachments. Here you can add, preview, download and delete attachments.



### Add file
You can add an attachment in one of two ways: either press **Add file** and browse the file system for the file, or drag-and-drop the file from a folder to the center content section. Pureservice will let you know if you are outside the drag-and-drop boundaries with an forbidden sign.

### Preview
To preview an attachment, click on the thumbnail. The attachment will be displayed centred on your screen and in full-size.
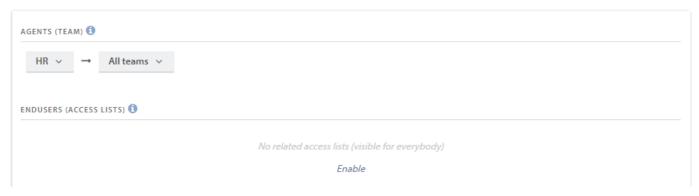
### Download
If you want to download an attachment to your local machine, simply click on the file name.

**Delete**

Click on the delete button to remove the attachment from the FAQ.

## Access control



Choosing the **Access control** option in the content menu opens the article's access control. Here you can choose which agents and or endusers who will see this article.

### Agents (Team)

Select which team (or all) that should have access. An agent must be a member of the selected team to gain access.

> ✳ When you first create a new FAQ article it will default choose the department your standard team belongs to and the setting "All teams".

### Endusers (Access lists)
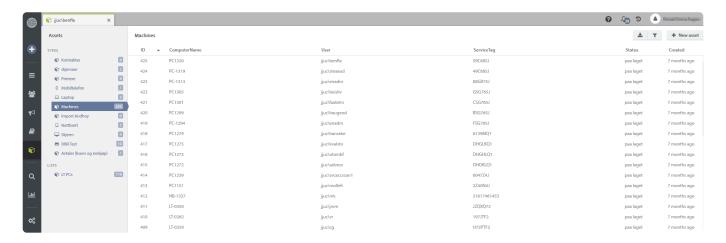
Add or remove one or more access list. A user must be included in at least one of the access-lists to gain access. Search for available access lists in the search box. This option is only available if the article is published to Selfservice.

# Information

At the bottom of the sidebar, you will find information about when the article was created and modified.

# Asset

Assets are grouped into their asset type and the types are sorted by the time of creation.



Pay attention to the number to the right of every list heading, as it indicates how many assets there are in the list.

There are several functions available in the top right corner of the asset site; "New asset" to manually create a new asset (see the manual page "Create a new asset" for details), the Filter button to filter your current list/view, and an Export list button (  ) that will give you the list in a CSV file format.

As with for example ticket lists, you can create custom asset lists based on filters you define yourself and the filter function includes all the custom fields of the relevant asset type.
This allows you to find and extract useful information such as "PCs with less than 8GB RAM" or "Contracts that were signed in 2014", to give a couple of examples.

You can get started with this by clicking on the Filter button (  ).
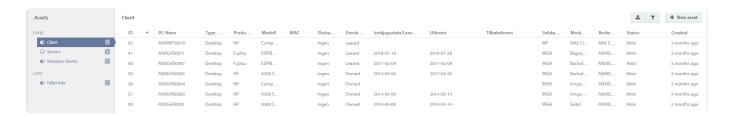
A small warning will appear at the top of the list if it is changed while viewing it (  ). Clicking this will update the list.
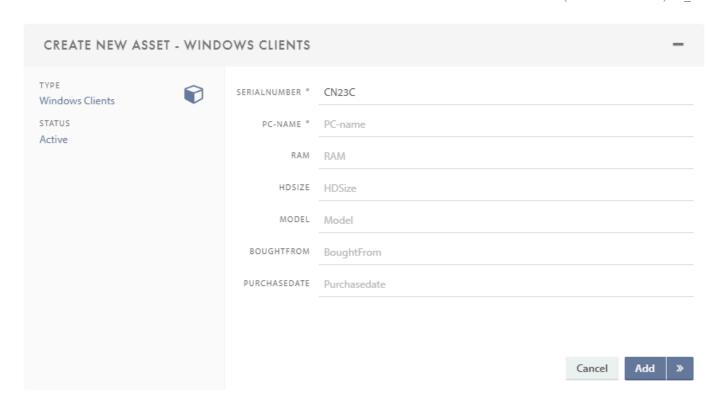
# Create a new Asset

To create a new asset you mark the asset type you want to create, and click **New asset** in the top right corner.



This will open the new asset dialogue, where you can fill in all the required and/or opional fields. You can also change the specific asset type and the status you want the asset to have before creation

## CREATE NEW ASSET - WINDOWS CLIENTS     —

TYPE
Windows Clients

STATUS
Active

| | |
|---|---|
| SERIALNUMBER * | CN23C |
| PC-NAME * | PC-name |
| RAM | RAM |
| HDSIZE | HDSize |
| MODEL | Model |
| BOUGHTFROM | BoughtFrom |
| PURCHASEDATE | Purchasedate |

Cancel    Add   »

After you filled in all necessary data you can click **Add** to create the new asset or **>>** to create the new asset and open it

# Working with an Asset

To work with an asset you can double click one from the list to open it. This will open a view similar to this:



The view can be divided into three sections:

# Header

The **Header** consists of four specific types of information



## Icon

This is a visual clue for which type of asset you're looking at.

## Asset type

This is the name of the asset type.

## Name
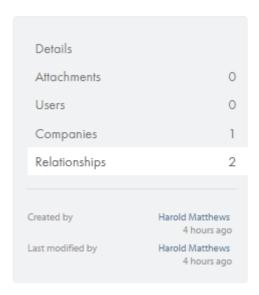
This is the name of the specific asset, and the same as the assets **Name** field.

## Status

This shows the current status of the asset. The status can be whatever you configure for this asset type, but mainly the status reflect either an **Active** or **Inactive** state.

# Sidebar

The **Sidebar** of an asset gives the agent an overview of the asset and its history.

| Details | |
|---|---|
| Attachments | 0 |
| Users | 0 |
| Companies | 1 |
| Relationships | 2 |
| | |
| Created by | Harold Matthews<br>4 hours ago |
| Last modified by | Harold Matthews<br>4 hours ago |

## Details

Here all fields for this asset type and this assets information are shown.

## Attachments

If the asset has attachments this list will show all of them. The agent can also chose to add more attachments here.

## Users

If the specific asset has one or more related users they will be listed here.

## Companies

If the asset is related to one or more companies they will be listed here.

## Relationships

If the asset has any relationships to other assets, tickets or changes this list will show all of them.

# Content center

The **center content** view is where you can see all the information from the menu options you chose.
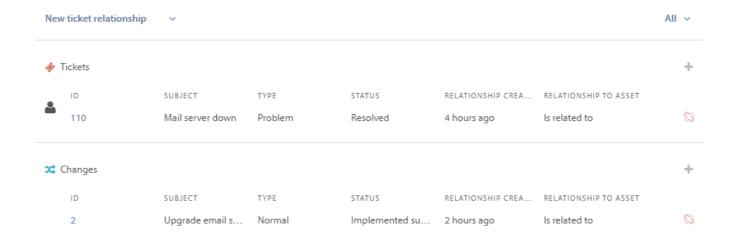
The most used menu option, and the default one that will always show when you open an asset is the **Details** view

| | |
|---|---|
| PC-NAME* | OSL-S-NFVO |
| SERIALNUMBER* | 498GZ858787400698 |
| RAM | 22 |
| HDSIZE | 247 |
| MODEL | Compaq D269 |
| SUPPLIER | "Dustin, Vinstra" |
| PURCHASE DATE | 2014-05-06 |

**ATTACHMENT**

*No attachments*

**RELATED ASSETS**

*No related assets*

This is where all the relevant data for this specific asset will show. The agent can change any information in the fields, but remember that the mandatory **Unique** field needs to be unique.
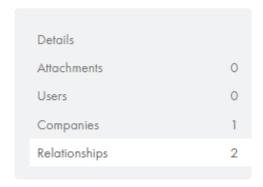
# Asset Relationships

Choosing **Relationships** in the Sidebar shows you assets, tickets and changes related to this asset.
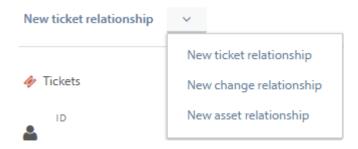


To remove a relationship, click the  button next to the relationship.

The numbers to the right in the sidebar shows you the how many items are related to the asset.
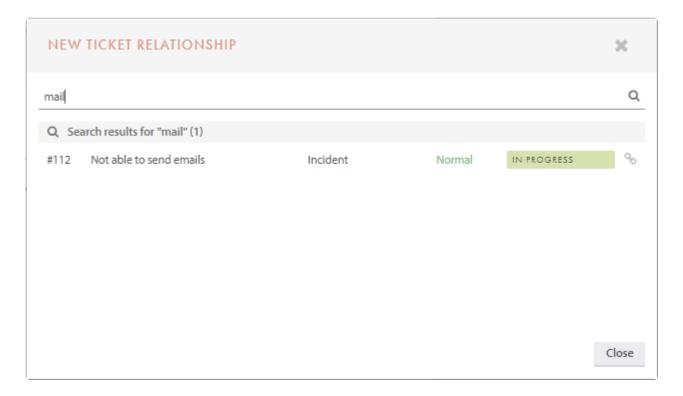


# New relationships

Relate new items by clicking the ➕ button or by choosing relationship type in the top menu.



Search for tickets to relate by searching for the ticket subject.

**NEW TICKET RELATIONSHIP**                                    ✖

mail                                                          🔍

🔍 Search results for "mail" (1)

#112    Not able to send emails          Incident      Normal      IN PROGRESS      🔗

                                                                    Close

Or search for a change.

**NEW CHANGE RELATIONSHIP**                                    ✖

server                                                        🔍

🔍 Search results for "server" (1)

#2     Upgrade email server             Normal        Low         NEW          🔗
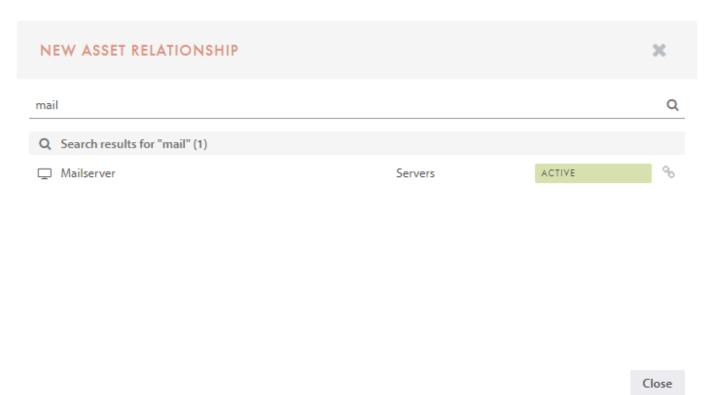
                                                                    Close

You can also relate to other assets.

## NEW ASSET RELATIONSHIP

✖

mail                                                                        🔍

🔍  Search results for "mail" (1)

🖥  Mailserver                                    Servers            ACTIVE            ⸜

Close

# Search
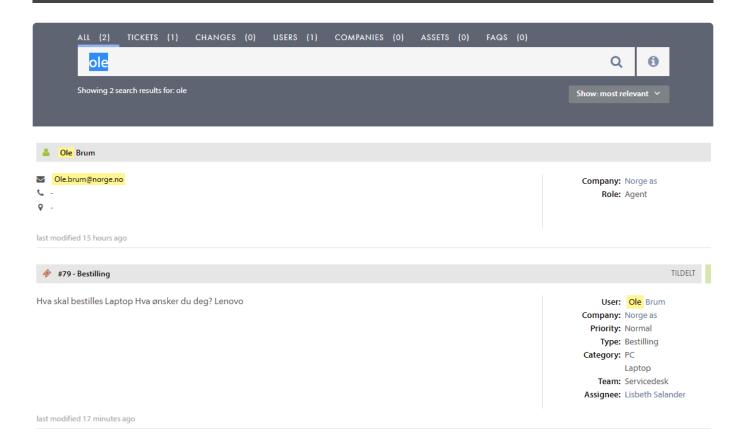
The search function can be accessed by pressing the "Search" button  in the leftmost menu in Pureservice.

It is built on the Lucene search engine, which enables full-text search. Pureservice lists results that contain some of or all the matching words from the search term. Pureservice also returns, based on advanced algorithms, terms that are close matches to the search term.

> ✱ Pureservice also has its own quick search function, named Commander which is opened by pressing CTRL+ SPACE

# How to search



## Membership-based search

Agents and administrators can search for tickets based on team memberships, meaning that an agent/administrator can only search for tickets that are unassigned, assigned to his/her team(s) or assigned to him/her personally.

## Search terms

A search term can consist of a keyword, phrase, wildcard, multiple search criteria, or all of the above combined.

### Multiple search criteria

Pureservice uses multiple search criteria, which allows you to perform a more detailed and accurate search. By using certain keywords, such as AND, OR, NOT, Pureservice can exclude less relevant results.

### Tips for searching

In addition to regular search, Pureservice supports a number of special keywords and rules:

- Quotation marks ("") will match exact keywords. ("Pureservice servicedesk") will only match that exact word combination, and not: Pureservice is a servicedesk.
- Asterisk/wildcard ( * ) will match something that contains parts of other words. (Pure* ) will match both Pureservice and Puredesk, while (*service) will match both Pureservice and Selfservice.
- AND can be used to combine keywords. ("Ole Petter" AND Pureservice), will match everything that contains both "Ole Petter" and "Pureservice").
- OR can be used in the same way as above, but will give results that contains either one or the other (we also add this

by default between keywords – see the first line of "Custom rules" below).

- NOT can be used to exclude something ("Ole Petter" NOT Pureservice), will give results that contains "Ole Petter", but doesn't contain "Pureservice").

Custom rules we have expanded the search with:

- We put OR between keywords: (Ole OR Petter).

- We put an asterisk / a wildcard (*) at the end of keywords so that the keyword "Pure" will match both "Pureservice" and "Puredesk".

- Search results for ticket and change numbers will show the most relevant match at the top. A search for the number 13 will result in a ticket/change with ID 13 at the top and then the one with ID 1337 for example.

- There is weighting for different types of search results. Matches for ticket number, change number and name will be shown at the top, followed by username, email, telephone, company name, title/subject on FAQ and FAQ tags. All other matches beyond these are weighted equally.

- If the results are sorted by "Best match", results will first be sorted by weighting, and then date (newest to oldest).
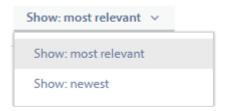
# Results

## Filters

You can filter the search results, by choosing to view **All**, **Tickets**, **Changes**, **Users**, **Companies**, **Assets** or **FAQs**.
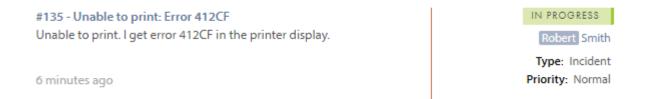


There is a secondary filter to the right, that sorts the results.



## Search results

Search terms are **highlighted** in the result list. The center of the screen shows the primary content, for example the ticket description and subject. To the right, you can see less important information, such as ticket type, status, priority.



Choosing the highlighted subject of a ticket will take you to the ticket page, where you can view and manage it. Choosing the highlighted name of a user/company, will open the user's/company's page.

# Commander

Pureservice has its own quick search function, named Commander. To open it, simply press CTRL+ SPACE. Commander

will pop up in the center of the screen. Click on the wrench icon ⬜ for advanced search settings. To close
Commander, press anywhere outside the search window or the ESC button.

| | |
|---|---|
| Type to search... | 🔧 |

☐ Include inactive users

☐ Include inactive companies

☐ Include unpublished FAQs

☐ Include inactive assets

With Commander you can:

- perform a "regular" search that opens the traditional search page (requires at least two characters)
- search for tickets, changes, users (administrators, agents and end users), companies and telephone numbers
- search for ticket number or change number
- create a new ticket, change, company, user or announcement
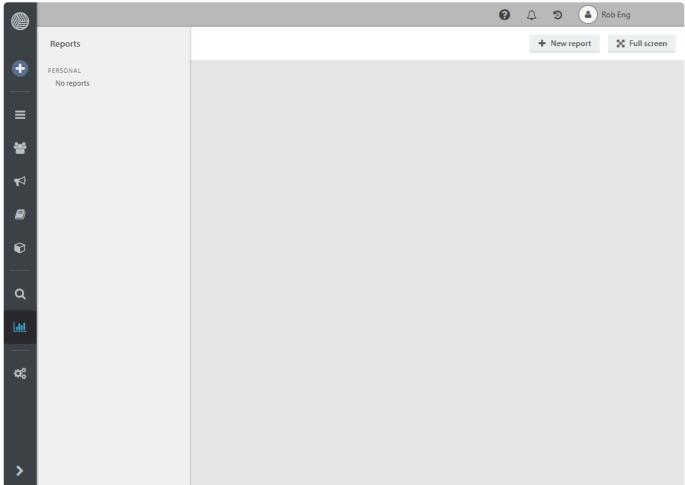
# Reports

In the report console an agent can build and edit reports. The agent can keep the reports personal or choose to publish them to his teams.

You build a report by drag-and-drop functionality and every element in the report can be filtered to show you exactly the information you need.
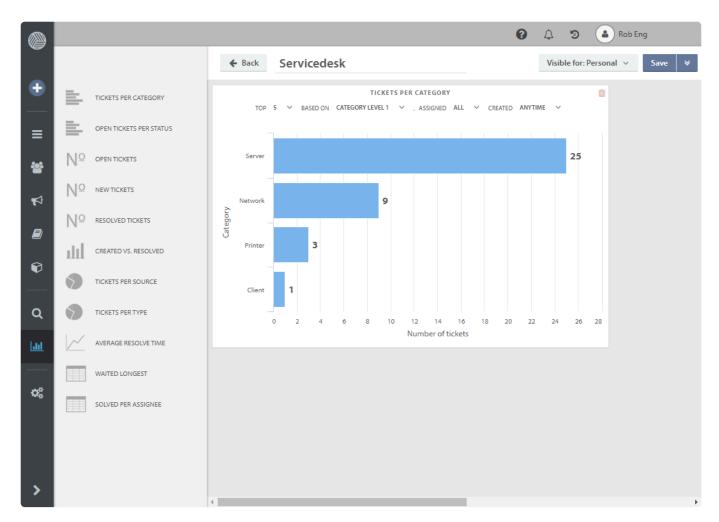
There is also a fullscreen mode to show the whole report on a monitor. Reports in fullscreen has their own URL which is useful (for example for automatically opening the fullscreen report on a dedicated monitor).

This is the view in the report module before you have created reports:
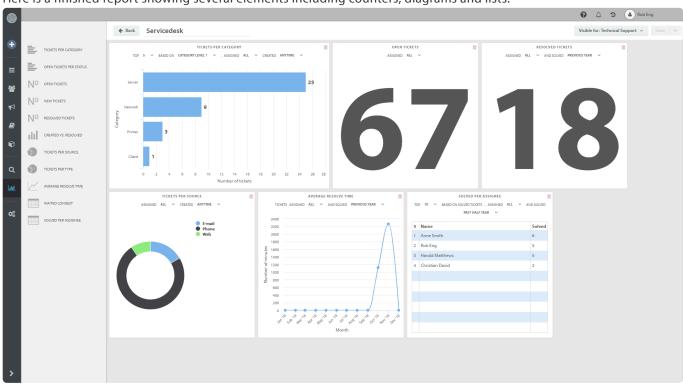


Click "New Report" to create a report, and the report builder will let you setup your own report:

To build a quick report you can drag elements into the report (the big, empty space). When you've dropped an element into the report you can filter what it shows:
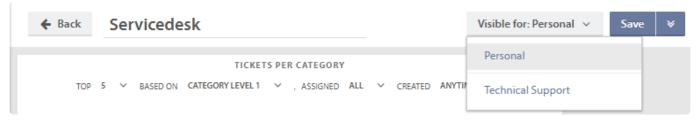
Here is a finished report showing several elements including counters, diagrams and lists:



✳ You can use keyboard shortcuts on this site; Ctrl+S to Save and Ctrl+Shift+S to Save and Close.
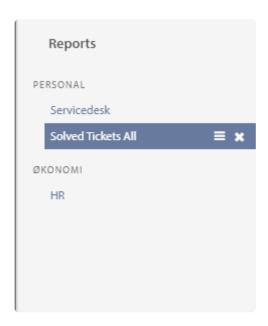
If you click "Edit" you will activate the report builder again where you can move the elements, resize them, change the filters, etc

If you want to publish the report to your teams, you can achiev this by clicking the menu "Visible for:":



The report list on the main page will show you your personal reports and those that are visible to the individual teams you are a member of.
Here you also have the option of sorting the reports in the desired order by dragging them up and down.
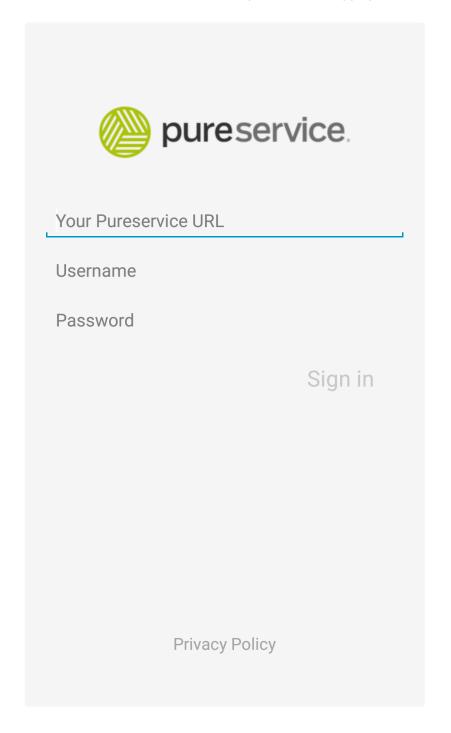
# Pureservice app

The Pureservice app can be downloaded for
Android products in Play Store
and for Apple products in App Store

# Login
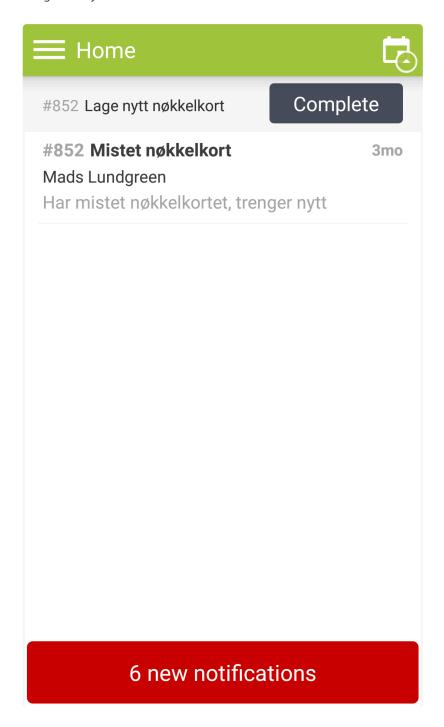
**Administrators** and **agents** can log in to the Pureservice app. You need a username and a password in order to log in, and this must to be set in Pureservice before using the app (even if you are using single sign-on when using Pureservice).

**Your Pureservice URL** is the same URL you use when logging into Pureservice in your browser.
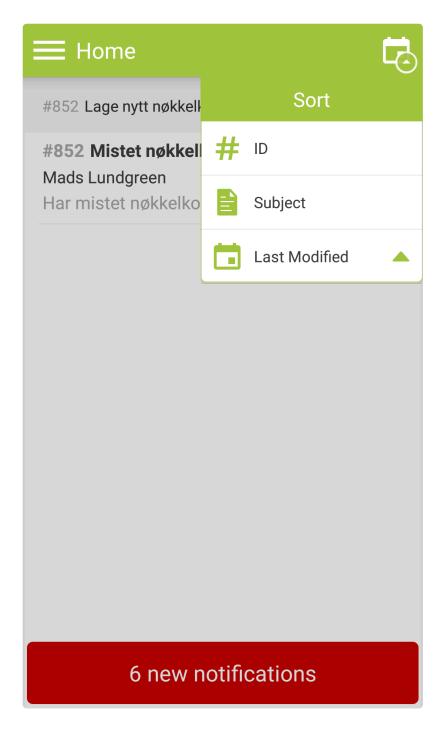
# Home screen

First thing you see when logging in is the **Home** screen. This screen contains all your tasks and incidents in progress assigned to your teams.

| Home |
| --- |
| #852 Lage nytt nøkkelkort    **Complete** |
| **#852 Mistet nøkkelkort**    3mo |
| Mads Lundgreen |
| Har mistet nøkkelkortet, trenger nytt |
| |
| **6 new notifications** |
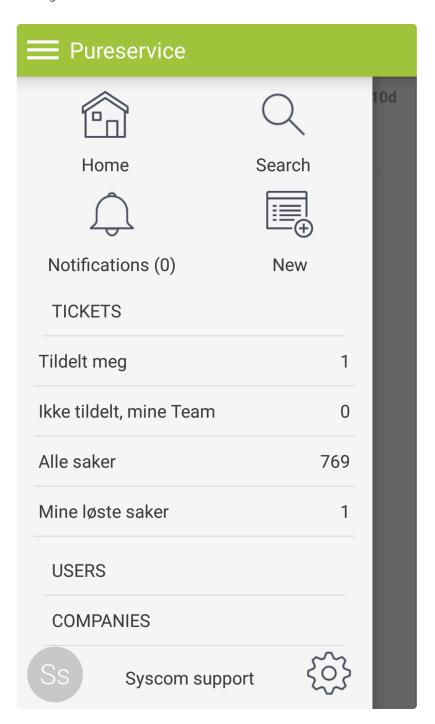
This list can be sorted by **ID**, **Subject** and **Last modified** (by ascending or descending order) by clicking the arrow icon in the top right corner.

# Home

Sort

## ID

## Subject

## Last Modified

#852 Lage nytt nøkkel

#852 **Mistet nøkkel**

Mads Lundgreen

Har mistet nøkkelko

**6 new notifications**
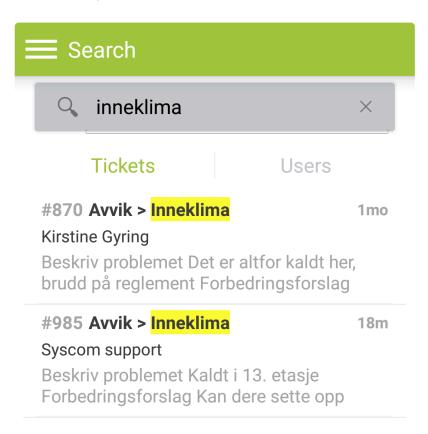
# Menu
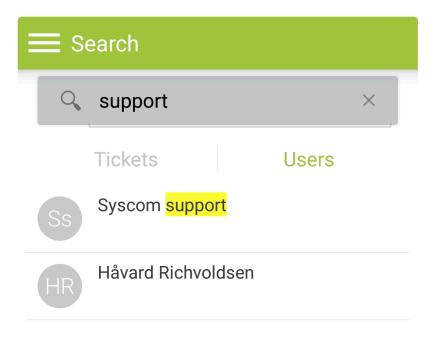
The menu is opened by clicking top left icon. [≡] Here you can search for tickets and users, see your notifications and create a new ticket. You also see the same lists as in Pureservice, and you can find users and companies and look at settings.

# Search
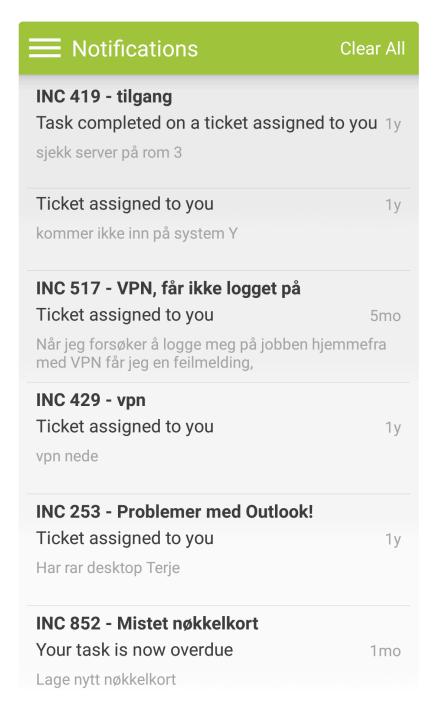
Under **Search** you can search for tickets or users.

## Search

support ✕

Tickets | Users

Ss  Syscom support

HR  Håvard Richvoldsen
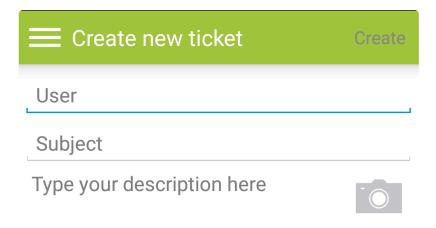
# Notifications

**Notifications** will show your notifications.

| Notifications | Clear All |
|---|---|

**INC 419 - tilgang**

Task completed on a ticket assigned to you  1y

sjekk server på rom 3

Ticket assigned to you  1y

kommer ikke inn på system Y

**INC 517 - VPN, får ikke logget på**

Ticket assigned to you  5mo

Når jeg forsøker å logge meg på jobben hjemmefra med VPN får jeg en feilmelding,

**INC 429 - vpn**

Ticket assigned to you  1y

vpn nede

**INC 253 - Problemer med Outlook!**

Ticket assigned to you  1y

Har rar desktop Terje

**INC 852 - Mistet nøkkelkort**

Your task is now overdue  1mo

Lage nytt nøkkelkort

# Create new ticket

Under **Create new ticket** you can create a ticket and attach a photo, either by taking a new photo, or by choosing one from you library.
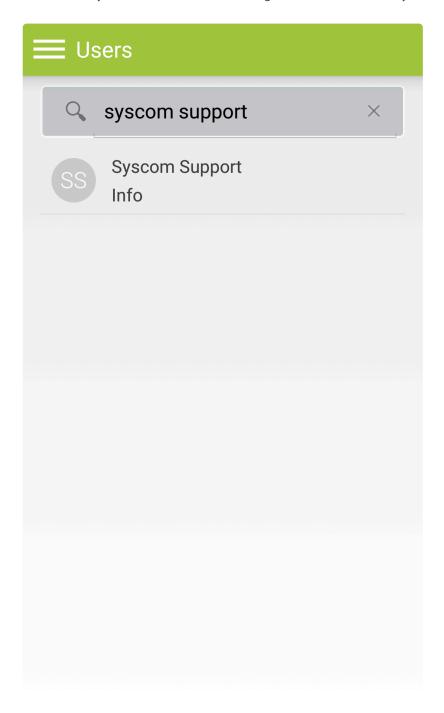
# Tickets

If you click on a ticket list in the menu, you will see all tickets in this list.

| ☰ Tickets - Ikke tildelt, mine T... | # |
|---|---|

**#497 Claim**                                      9mo

Christian Johannessen

**Order Number**
[not set]

**#494 Claim**                                      9mo

Thomas Fjeldheim

**Order Number**
234324

**#493 Claim**                                      9mo

Thomas Fjeldheim

**Order Number**
2344234

# Users

Under **Users** you can search for all users registered in Pueservice. By clicking the user, the user's profile is shown.

# Profile

**SS**

## Syscom Support

Work

### 23205140

Email

### support@syscomworld.…

Address
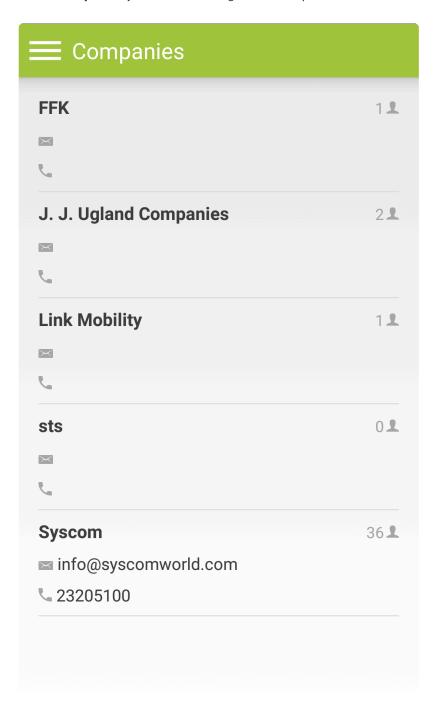
### Sørkedalsveien 6
### 0369 - Oslo
### Norway
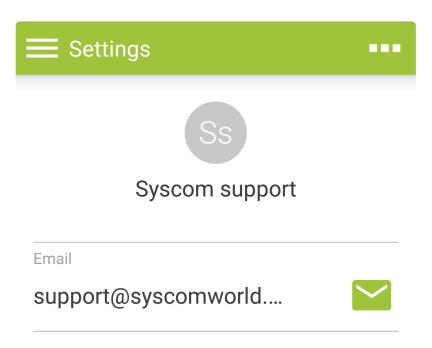
# Companies

Under **Companies** you will find all registered companies.

| ☰  Companies |
|---|
| **FFK**      1 👤 |
| ✉ |
| ☎ |
| **J. J. Ugland Companies**      2 👤 |
| ✉ |
| ☎ |
| **Link Mobility**      1 👤 |
| ✉ |
| ☎ |
| **sts**      0 👤 |
| ✉ |
| ☎ |
| **Syscom**      36 👤 |
| ✉ info@syscomworld.com |
| ☎ 23205100 |

# Settings

**Settings** are found by clicking the icon ⚙ on the bottom of the menu.
Here you will see your details, app version and you can sign out of the app.

| ☰  Settings | ••• |
| --- | --- |

**Ss**

### Syscom support

Email

support@syscomworld....          ✉

### Sign out

Version: 1.1.3

# Administrator Console

Administrators can manage the helpdesk and its users (end users, agents and other administrators) in the

**Administrator Console**. Simply click  in the bottom-left corner to access the console.

**Administration**

⚙️ GENERAL

Releases

System status

Features

Apps

↩️ CHANNELS

Email

SMS

Patterns

🏷️ TICKET

Categories

Priorities

Sources

Statuses

Types

Time log types

⤬ CHANGE

Priorities

Statuses

Types

% RELATIONSHIPS

Types

📖 FAQ

Category tags

📦 ASSET

Types

Imports

👥 SELFSERVICE

Settings

Categories

Forms

Links

Access lists

🛡️ SECURITY

Agents

Departments and Teams
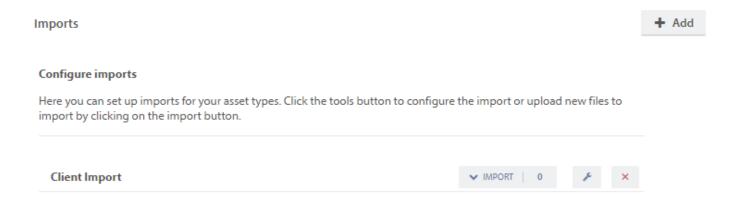
The **Workflows -> Imports** and **Maintenance -> Logging** options are only visible if you have Pureservice installed on-premise.

# Asset

This is where you manage asset types and imports
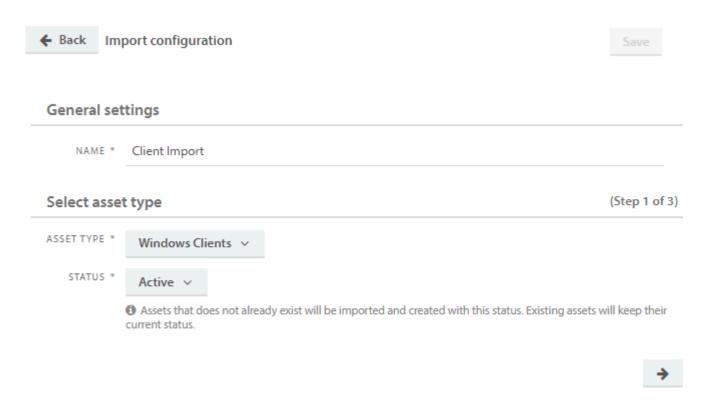
# Imports

Asset imports are the managed imports of assets from external sources. To set up a new import you will need a file with the correct field names. Both comma and semicolon can be used as an delimiter.



## How to add new import
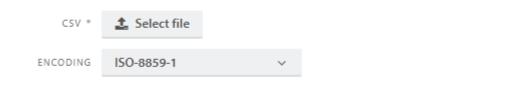
1. To create a new import click **Add** in the top right corner, give the import a name and specify which asset type it should be



2. The next step is where you link the .csv-file to the import. This step is just for reading the field names and creating the fields

## Select CSV file and character encoding (Step 2 of 3)

CSV *   [⬆ Select file]

ENCODING   ISO-8859-1 ⌄

[←] [→]

---

✳ **Example csv file:**
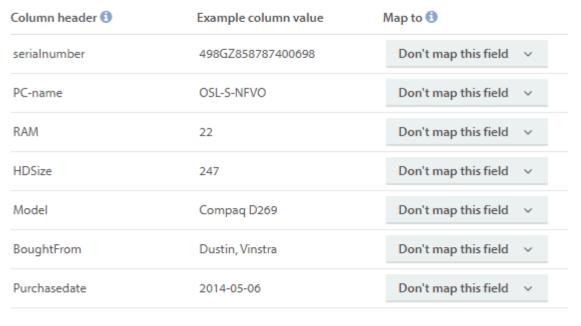
serialnumber,PC-name,RAM,HDSize,Model,BoughtFrom,Purchasedate
498GZ858787400698,OSL-S-NFVO,22,247,Compaq D269,"Dustin, Vinstra",2014-05-06
865CT229895014602,CPH-C-DWSZ,47,585,Compaq VL356,"Dustin, Furnes",2016-03-18
698QW369717113917,CPH-C-UBRM,64,527,Compaq VL226,"MPX, Vinstra",2016-12-15
869UV474717488405,STO-S-UORH,31,255,HP VL925,"Dustin, Furnes",2014-09-23
601SQ262188504736,CPH-S-EJVQ,18,517,HP D653,"Dustin, Vinstra",2013-09-13

---

3. The final step is where you map the fields from the asset type together with the fields from the .csv-file

## Select mapping (Step 3 of 3)

❗ Missing mapping for required field "pc-name"

❗ Missing mapping for required field "serialnumber"

| Column header ℹ | Example column value | Map to ℹ |
|---|---|---|
| serialnumber | 498GZ858787400698 | Don't map this field ⌄ |
| PC-name | OSL-S-NFVO | Don't map this field ⌄ |
| RAM | 22 | Don't map this field ⌄ |
| HDSize | 247 | Don't map this field ⌄ |
| Model | Compaq D269 | Don't map this field ⌄ |
| BoughtFrom | Dustin, Vinstra | Don't map this field ⌄ |
| Purchasedate | 2014-05-06 | Don't map this field ⌄ |
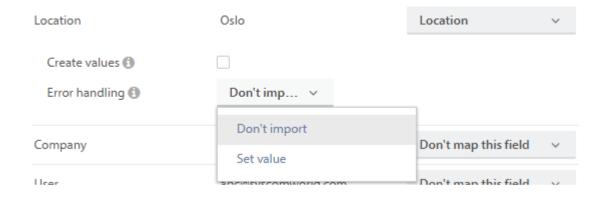
Click "save" at the top when all three steps are filled out correctly.            [←]

---
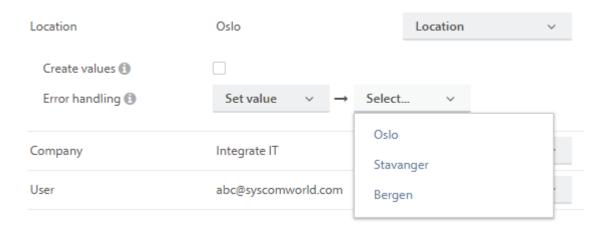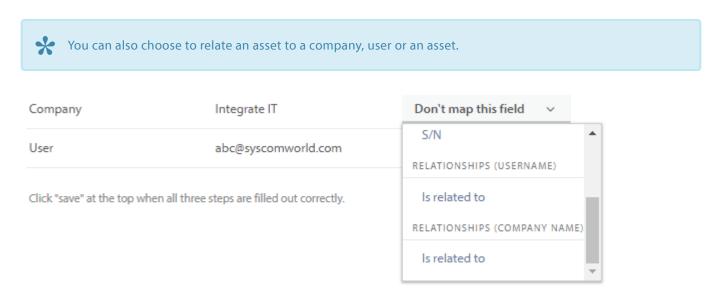
✳ When mapping a field to a combo box (dropdown) field in the asset type, multiple choices will appear.

You can choose to **Create values**, **Don't import** or **Set Value**. Mouseover the **info icon (i)** for more information.

When choosing **Set value**, you will see already existing values in the dropdown list.

✳  You can also choose to relate an asset to a company, user or an asset.
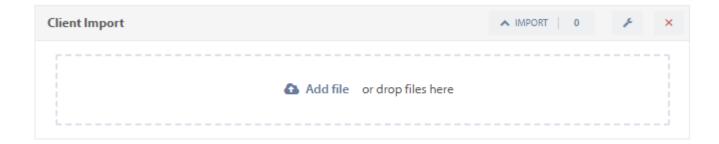
To successfully relate an asset to a company or a user, the company name or username needs to match already existing ones in Pureservice.

4. When you've finished mapping the fields you need, click **Save**
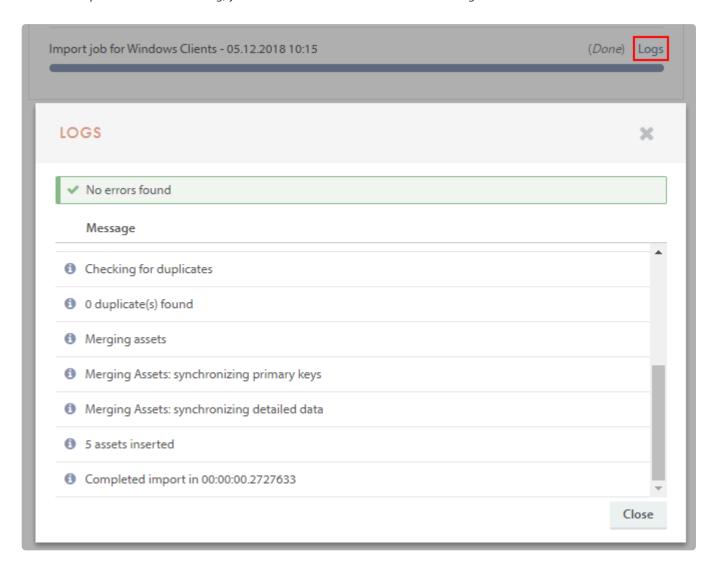
If you need to configure an existing asset import, you can do this by clicking the Edit icon

# Run an import

To run an import expand the import window by clicking on the import button. Then select the .CSV file. The import will then start running.



After the import is finished running, you will see the status and can click on "logs" for more information.



# General Settings

You can change the name of the import here in addition to audit who and when it was created and modified the last time.
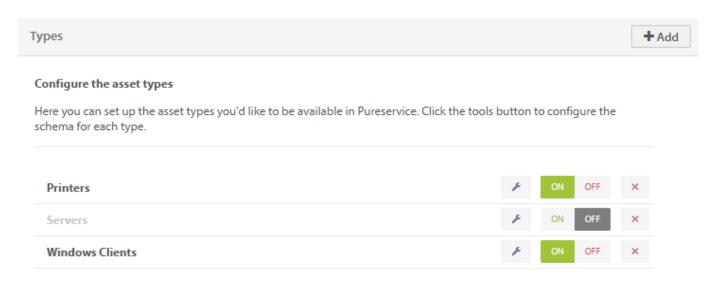
# Asset type

You can not change the asset type of an import after it's created. If you need to change the asset type you need to remove the existing import and create a new for the new asset type.

You can however change which status newly imported assets should have.

# Types
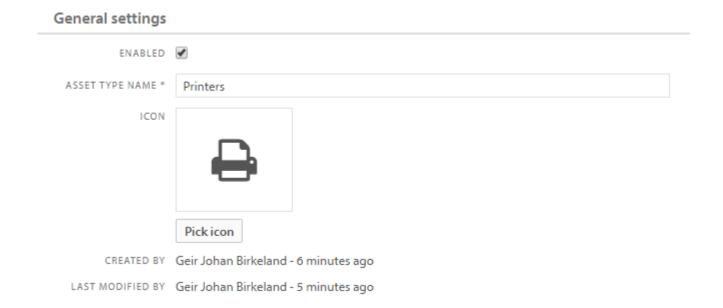
Asset types are specific categories of assets that can be grouped together. Some examples are laptops, printers, contracts.



To add a new asset type, click **Add** in the top right corner.
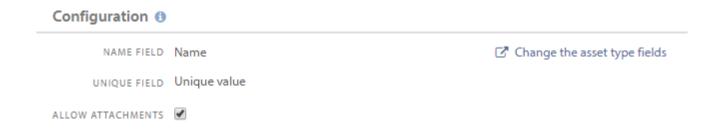
## General settings

This is where you give the asset type a name and icon. You can also render the asset type active or inactive here.
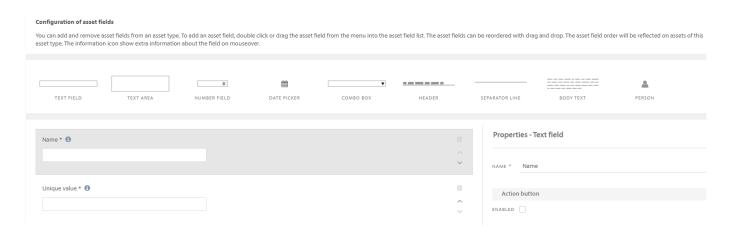


## Configuration

Each asset type have a specific set of fields that define what type of data you wish to store in each asset of this type. There are two mandatory fields, but you can choose what data you wish to store in them. To add more fields to an asset type you can open the field designer by clicking **Change the asset type fields**

## Configuration of asset fields

In the field designer you can add or remove fields to the asset type, with the exception of the mandatory fields **Name** and **Unique Value**.



# Statuses

Assets of a particular asset type can have statuses applied to them. You can chose to just use the built in status **active**, or you can add more statuses. For example, statuses can be **active**, **disposed**, **missing**, **stolen**, **in stock**, etc.
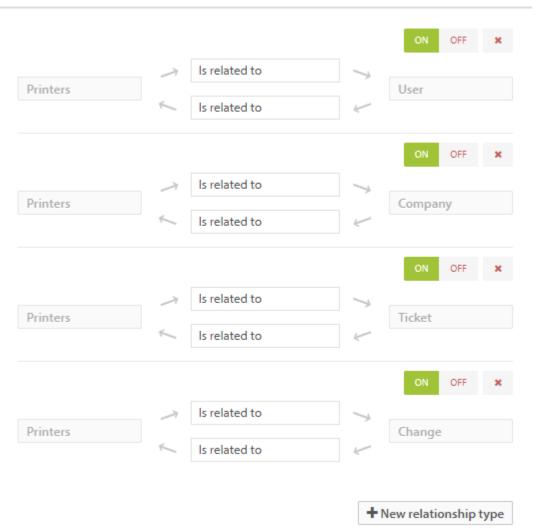


# Relationship types

Assets can be related to other objects in Pureservice. For example, a laptop can be "owned by" a **company**, "used by" a

**user**, "related to" a **ticket**. You can define the standard relationships an asset type can have in this section.

### Relationship types ⓘ

| | | |
|---|---|---|
| Printers | → Is related to → ← Is related to ← | ON OFF ✖ User |
| Printers | → Is related to → ← Is related to ← | ON OFF ✖ Company |
| Printers | → Is related to → ← Is related to ← | ON OFF ✖ Ticket |
| Printers | → Is related to → ← Is related to ← | ON OFF ✖ Change |

**+ New relationship type**

# Change
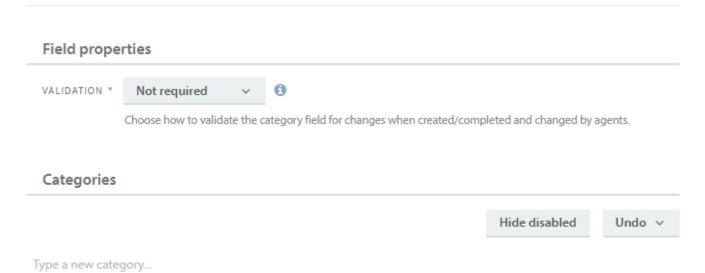
As an administrator, you can manage the change request properties in the Administrator Console, meaning that you can add, edit or delete property values.

# Categories

Categories can be mandatory if chosen in field properties settings. Using them actively can greatly improve the reporting data, as they provide clarity to the registered changes. The change category tree does not come with predefined values, and can be divided into three layers. You can add, rename, enable/disable and delete category values.

**Configure the change category tree**

You can add new, rename, enable/disable and delete categories in up to 3 levels/tiers. Note that the configured categories will instantly be available for agents.

**Field properties**

VALIDATION *    Not required    ⌄    ⓘ

Choose how to validate the category field for changes when created/completed and changed by agents.

**Categories**

Hide disabled    Undo ⌄

Type a new category...

## Field properties

**Field properties**

VALIDATION *    Not required    ⌄    ⓘ

Choose how to validate the category field for tickets when created/solved and changed by agents.

This configures how the category field on changes are validated. The choice will only apply when agents create or change changes and not when changes are created or changed via self-service, API, email or other sources.

You can choose between the following settings:

**Not required**
Categorization is not required (default)

**Required when creating**
Categorization is required when agents create changes

**Required when solving/closing**
Categorization is required when agents are solving or closing changes

**Required when creating and solving/closing**
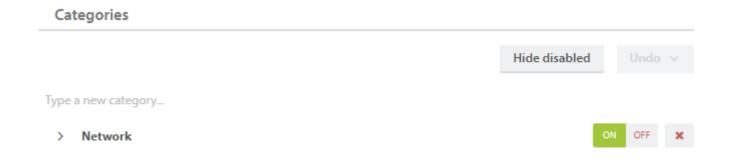
Categorization is required when agents create/resolve or close changes

**Required for status change**

Categorization is required when agents change the status of changes

# Add new category

Type the category name in the input field and press the return/enter key to add a new category. To add a subcategory, type the name in the overlying input field of the parent category.



# Rename category

Double click on the category you want to rename. Press return/enter when you have finished editing the name.

# Enable / disable category

It is possible to deactivate/disable a category without removing it completely from the help desk. Simply press "Off" to do so. To activate/enable the category again, press "On" . Disabling a category already in use by a change will *not* remove the change's categorization. Disabling a category only restricts new changes from using it.

The background colours of the buttons indicate whether a category is enabled or disabled. If a category is enabled, the background colour of the "On" button is green. If a category is disabled, the background colour of the "Off" button is dark grey.

Use the "Hide/Show disabled" button to get a sorted overview of the active categories in your organization.

# Delete category

Press to the right of a category to delete it permanently. Removing a category already in use by a change will *not* remove that change's categorization. Removing a category only restricts new changes from using it. If you regret deleting a category, it can be restored by using the "Undo" button.
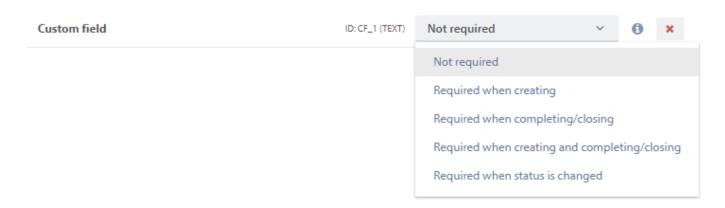
Hide disabled     Undo ⌄

Undo delete Network

# Custom Fields

Here you can create custom fields for changes that will be available on the change page. It is possible to add up to 3 fields of the types text, number and/or date. Custom fields can also be used within lists and filters for example.

**Custom fields** Save

**Configure custom fields**

Here you can create custom fields that will be available on the ticket page. It is possible to add up to 3 fields of the types text, number and/or date.

Add new field ∨

Text

Number

Date and time

To add a new custom field, select one of three types of customfields: **Text**, **Number** or **Date and time**.

**Custom field** ID: CF_1 (TEXT) Not required ∨ ℹ ✖

Not required

Required when creating

Required when completing/closing

Required when creating and completing/closing

Required when status is changed

Here you can create a name for the custom field and select one of the five requirements for the custom field:

| Option | Explanation |
|---|---|
| Not required | The field is not required **(chosen by default)** |
| Required when creating | The field is required when agents create changes |
| Required when completing/closing | The field is required when agents are completed or closing changes |
| Required when creating and completing/closing | The field is required when agents create/complete changes |
| Required when status is changed | The field is required when agents change the status of the change |
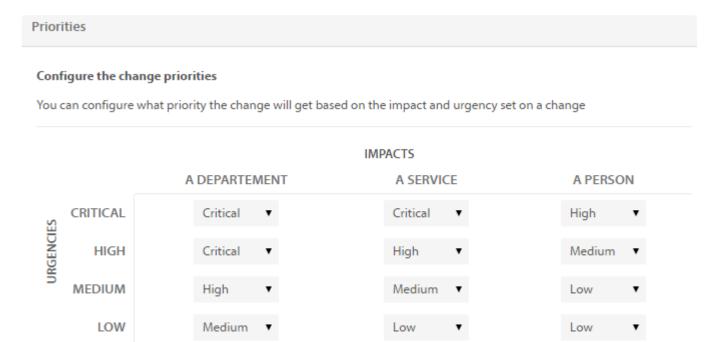
This configures how the custom field are validated on changes. The choice will only apply when agents create or change changes and not when they are created or changed via API or other sources.

| | | | |
|---|---|---|---|
| ☰ **Customer Name** | ID: CF_1 (TEXT) | Required when creating ⌄ | ⓘ ✖ |
| ☰ **Project Number** | ID: CF_4 (NUMBER) | Required when solving/cl... ⌄ | ⓘ ✖ |
| ☰ **Deadline** | ID: CF_7 (DATE AND TIME) | Required when status is c... ⌄ | ⓘ ✖ |

Add new field ⌄    ⓘ

Above is an example of how three configured custom fields can look. The unique identifiers **(ID: CF_x)** will also be shown after creation.

# Priorities

Which priority a change gets depends on the urgency and impact. Administrators can configure the priorities. There is no save button in this view, but changes made to the priority matrix are published immediately, meaning that agents and other administrator will be able to see the changes right away.
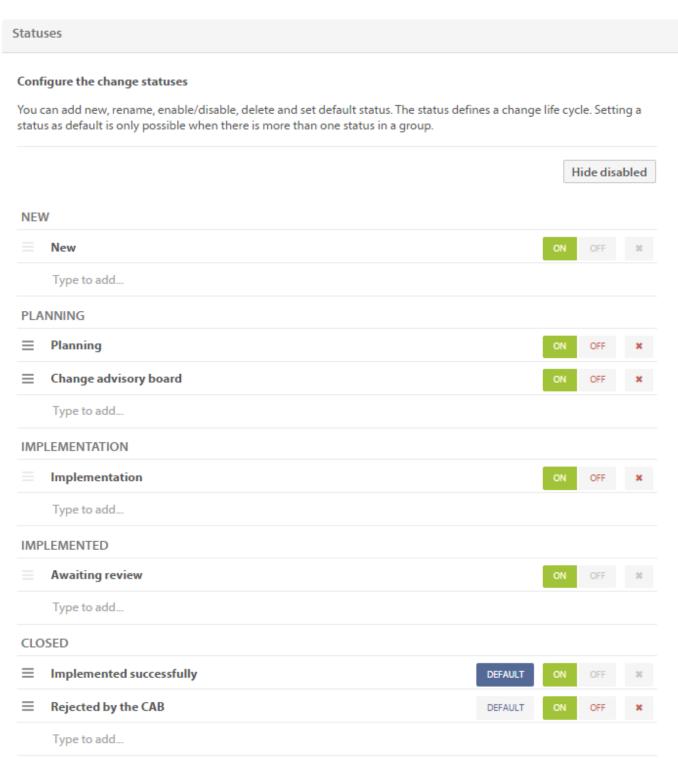
# Statuses

Change statuses work in a similar way as ticket statuses. A change status defines the life cycle, and as an administrator, you can manage the values. Change requests can have one of the following core statuses: **New**, **Planning**, **Implementation**, **Implemented** or **Closed**. Core statuses are also referred to as status groups. As an administrator, you can add new, rename, enable/disable, delete and set a default status.

---

**Statuses**

**Configure the change statuses**

You can add new, rename, enable/disable, delete and set default status. The status defines a change life cycle. Setting a status as default is only possible when there is more than one status in a group.

| | | Hide disabled |

**NEW**

| ☰ | New | | ON | OFF | ✕ |

Type to add...

**PLANNING**

| ☰ | Planning | | ON | OFF | ✕ |
| ☰ | Change advisory board | | ON | OFF | ✕ |

Type to add...

**IMPLEMENTATION**

| ☰ | Implementation | | ON | OFF | ✕ |

Type to add...

**IMPLEMENTED**

| ☰ | Awaiting review | | ON | OFF | ✕ |

Type to add...

**CLOSED**

| ☰ | Implemented successfully | DEFAULT | ON | OFF | ✕ |
| ☰ | Rejected by the CAB | DEFAULT | ON | OFF | ✕ |

Type to add...

---

✳ You cannot add, edit or delete core statuses, only the values within them.

# Add a new status

Each group has an input field in the bottom. Type a status name in the field and press enter to add a new status.

Type to add...

# Rename status

Click on a status name, either predefined or custom made, to edit it.

# Enable / disable status

It is possible to deactivate/disable a status without removing it completely from the help desk. Simply press "Off"
ON    OFF    to do so. To activate/enable the status again, press "On"    ON    OFF    . Disabling a status already in use by a ticket will not remove the ticket's status. Disabling a status only restricts new tickets from using it.

The background colours of the buttons indicate whether a status is enabled or disabled. If a status is enabled, the background colour of the "On" button is green. If a status is disabled, the background colour of the "Off" button is dark grey.

Use the "Hide disabled/Show disabled" button to get a sorted view of the active statuses.

# Default status

Setting a status as default is only possible when there is more than one status in a group. This only applies for the core statuses **New**, **Implemented** and **Closed**. When needed, the workflow selects a default status from the appropriate group.

# Delete status

Press    ✖    to delete a status permanently. It is not possible to delete a default status or a status in use. You can delete all of the statuses in the **Planning** and **Implementation** groups, as they do not depend on a default status. If the core statuses **New**, **Implemented** or **Closed** have multiple elements, you can delete all of the elements except the last one. It is not possible to delete the very last status in core statuses that depend on a default status.
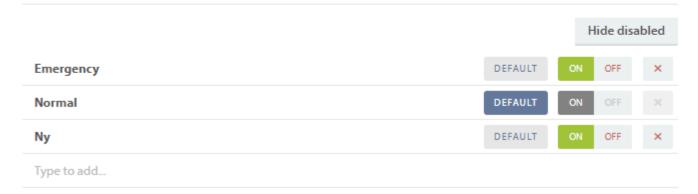
# Types

Change types are used to group changes together. Pureservice offers a set of predefined types that you can manage. In addition, you can add new, rename, enable/disable, delete and set default type.



## Add new type

To add a new type, enter a name in the input field at the bottom of the list and press enter.

## Rename type

Click on the name of the type you want to edit, and rename it.

## Enable / disable type

It is possible to deactivate/disable a type without removing it completely from the help desk. Simply press "Off"  to do so. To activate/enable the type again, press "On"  . Disabling a type already in use by a change will not remove the change's type. Disabling a type only restricts new changes from using it.

The background colours of the buttons indicate whether a type is enabled or disabled. If a type is enabled, the background colour of the "On" button is green. If a type is disabled, the background colour of the "Off" button is dark grey.

Use the "Hide disabled/Show disabled" button to get a sorted view of the active types.

## Default type

Pureservice is set up with **Normal** as the default change type. All new changes will be registered with the default type unless an agent opts the type during the registration process. Press the "Default" button to change default type.

# Delete type

Press  to delete a type permanently. Removing a type already in use by a change will *not* remove that change's type. Removing a type only restricts new changes from using it.

You cannot delete the default type.

# Channels

In the Channels section, you can set up inbound and outbound email channels, add outbound and two-way SMS channels, and manage patterns.
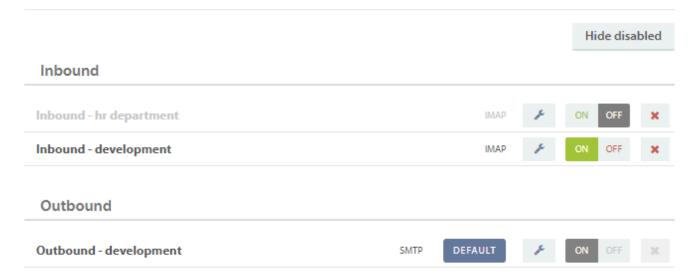
# Email

As an administrator, you can add, edit, enable/disable or delete inbound and outbound email channels.



Inbound channels receive emails from users and generate tickets from them. Outbound channels send emails from Pureservice to the users, e.g. with updates regarding tickets.

## Set as default email channel

The first outbound email channel added is automatically set as the default channel. If you have two or more outbound channels in the list, you can choose which channel to set as default by pressing the "Default" button. Inbound channels are "listening" for requests for the helpdesk. Hence, you cannot set a default inbound channel.

## Enable / disable a channel

It is possible to deactivate/disable a channel without removing it from the helpdesk. Simply press "Off" to do so. To activate/enable the channel again, press "On" .

The background colours of the buttons indicate whether a channel is enabled or disabled. If a channel is enabled, the background colour of the "On" button is green. If a channel is disabled, the background colour of the "Off" button is dark grey.

To get a clearer overview of the enabled channels, press "Hide disabled".

# Delete a channel

Press  to the right of a channel to remove it permanently.
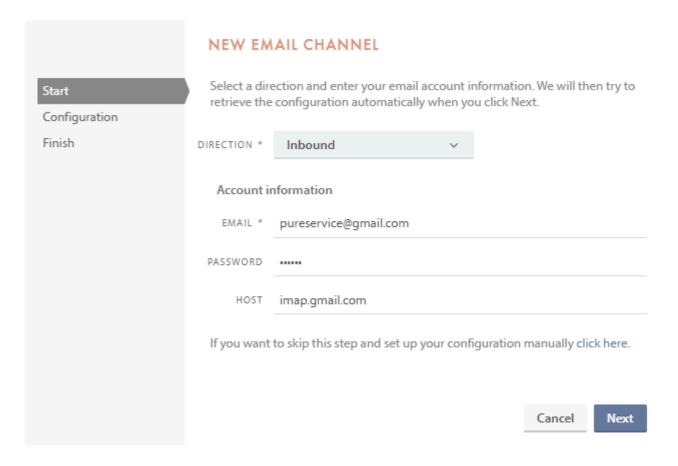
# Add a new email channel

You can easily add a new email channel by following a wizard. Press ![+ Add] in the top-right corner to open the wizard. The two first steps in the wizard are the same for both an inbound and outbound channel, while the last step differs slightly.

## Step 1 – start
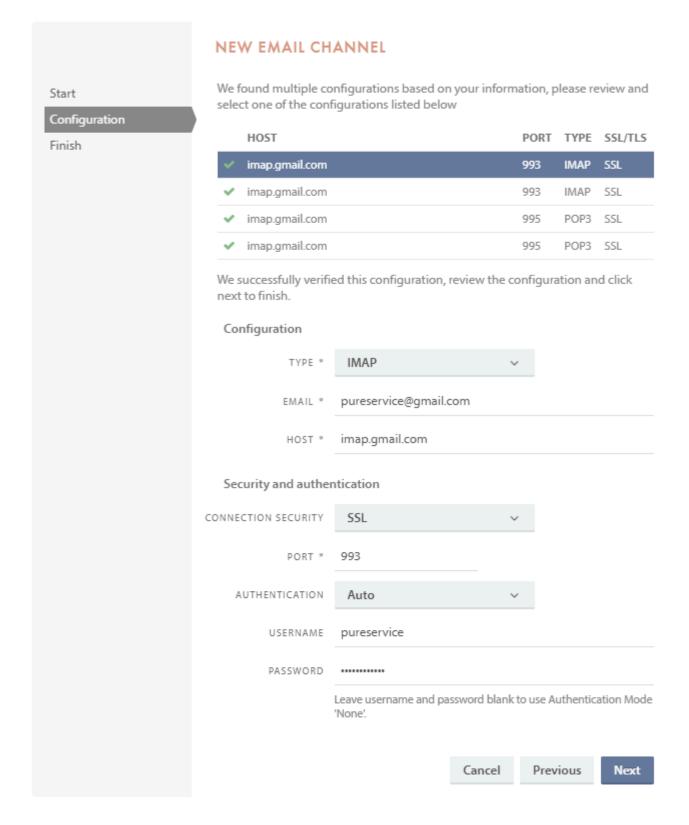
Select a **direction**, either inbound or outbound, for the new channel. The **email** field is mandatory, while **password** and **host** are optional. You can wait until the second step to enter a password, or enter a password after the channel has been created. Until you enter a password, the channel will not function properly. If you do not enter a host name, Pureservice will automatically search for one when you click "Next". This search might take some time, so please be patient.

If you want to configure the service manually, simply click on the link.



## Step 2 – configuration

Pureservice will search for the email provider and try to retrieve the configuration for the service automatically. If one or more channels are found for the requested email, a list will appear in which you can choose the preferred configuration. A red exclamation mark indicates that a configuration has been found, but the credentials could not be verified.

**NEW EMAIL CHANNEL**

Start

Configuration

Finish

We found multiple configurations based on your information, please review and select one of the configurations listed below

| HOST | PORT | TYPE | SSL/TLS |
|---|---|---|---|
| ✔ imap.gmail.com | 993 | IMAP | SSL |
| ✔ imap.gmail.com | 993 | IMAP | SSL |
| ✔ imap.gmail.com | 995 | POP3 | SSL |
| ✔ imap.gmail.com | 995 | POP3 | SSL |

We successfully verified this configuration, review the configuration and click next to finish.

**Configuration**

TYPE *　　IMAP

EMAIL *　　pureservice@gmail.com

HOST *　　imap.gmail.com

**Security and authentication**

CONNECTION SECURITY　　SSL

PORT *　　993

AUTHENTICATION　　Auto

USERNAME　　pureservice

PASSWORD　　••••••••••••

Leave username and password blank to use Authentication Mode 'None'.

Cancel　　Previous　　Next

If Pureservice cannot find the configurations, you can enter the settings manually. The settings will be verified when you click "Next".

✳ If choosing type "Exchange web services (EWS)", the configuration settings will be different.

Configuration

TYPE * Exchange web services (EWS) ⌄

EMAIL * ews@example.com

URL https://outlook.office365.com/EWS/Exchange.asmx

Leave blank to use the Exchange Web Services Autodiscover feature to determine the url automatically.
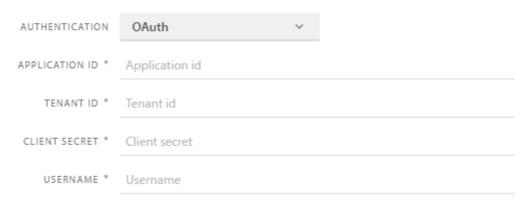
**URL** is used instead of **HOST**

Default URL for EWS is the following: https://<mail.server>/ews/exchange.asmx
This can vary depending on how your EWS is configured and set up.

## OAuth authentication

A channel set up using Exchange Web Services allows for OAuth authentication, while only Basic authentication is supported by the other protocols.

Security and authentication

AUTHENTICATION OAuth ⌄

APPLICATION ID * Application id

TENANT ID * Tenant id

CLIENT SECRET * Client secret

USERNAME * Username

This setup will require an application to be generated in your Azure portal, in **App Registrations**.
This application will require the following permissions:

**Exchange**
- EWS.AccessAsUser.All
- full_access_as_app
**Microsoft Graph**
- User.Read

Further information regarding how to enable full_access_as_app and EWS.AccessAsUser.All is available here:
https://docs.microsoft.com/en-us/exchange/client-developer/exchange-web-services/how-to-authenticate-an-ews-application-by-using-oauth?redirectedfrom=MSDN

Once the app has been set up, add the respective information to Pureservice:
**Application ID** and **Tenant ID**: Both can be found on the Overview page.
**Client Secret**: The Value of a secret generated in the Certificates & Secret menu.
**Username**: Enter the SMTP address of the user to impersonate when connecting to EWS. Pureservice will connect to this user's mailbox for sending/receiving. Normally the same as the "Email Address" setting.
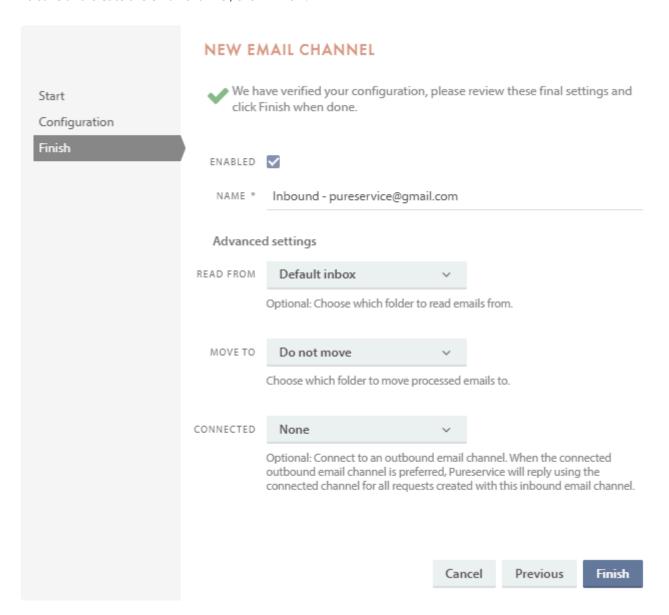
# Step 3 – finish

In the finishing stage of creating an inbound or outbound channel, you can set some final settings. Upon creation, a channel can be enabled or disabled by checking/unchecking the "Enabled" box. It is mandatory to name the channel.

**Inbound channel**

For an inbound channel, you can configure **Advanced Settings**. You can choose a default folder to read emails from in the **Read From** drop-down list. Emails can be moved to a certain folder after they have been processed. To do so, choose a folder in the **Move To** drop-down list. If you have created any outbound email channels, it is possible to connect an inbound channel with an outbound. Pureservice will use the connected outbound channel when responding to tickets created by the inbound channel.

To save and create the email channel, click "Finish".

**NEW EMAIL CHANNEL**

Start

Configuration

Finish

✔ We have verified your configuration, please review these final settings and click Finish when done.

ENABLED ☑

NAME * Inbound - pureservice@gmail.com

Advanced settings

READ FROM | Default inbox ⌄

Optional: Choose which folder to read emails from.

MOVE TO | Do not move ⌄

Choose which folder to move processed emails to.

CONNECTED | None ⌄

Optional: Connect to an outbound email channel. When the connected outbound email channel is preferred, Pureservice will reply using the connected channel for all requests created with this inbound email channel.

Cancel    Previous    **Finish**

❗ Once enabling an inbound channel, Pureservice will instantly start reading emails from that channel. Keep in mind to check that the mail box only contains relevant emails that you want to generate tickets from.

## Outbound channel

For an outbound channel, you can set **Sender Details**. Type an email in the **Sender Email** field to set as "From" address for all outgoing emails. You can also set a **Sender Name** for all outgoing emails. **Sender name** is the name seen by recipients of your emails. Leave both fields blank to use the server default.

Nullstilling av passord      Inbox   x

**Syscom Support**
to me

Norwegian ▾   >   English ▾   Translate message

Hei Geir

Vi har mottatt en anmodning om å nullstille passordet på https://servicedesk.pureservice.com/.

Vennligst følg linken under for å lage nytt passord. Linken virker i 24 timer.

Nullstill passordet ditt

Hvis du ikke ba om å få nullstilt passordet, vennligst se bort fra denne meldingen.

Vennlig hilsen
Syscom servicedesk

To save and create the email channel, click "Finish".

## NEW EMAIL CHANNEL

✔ We have verified your configuration, please review these final settings and click Finish when done.

ENABLED ☑

NAME *    Outbound - support@syscomworld.com

### Sender details

SENDER EMAIL    support@syscomworld.com

Sets the From e-mail address for all outgoing messages. Leave blank to use the server default. NOTE: This may not take effect depending on your mail server and settings.

SENDER NAME    Syscom Support

Sets the From name for all outbound messages. Leave blank to use the server default. NOTE: This may not take effect depending on your mail server and settings.

Start

Configuration

Finish

Cancel    Previous    Finish

# Edit inbound email channel

After a channel has been created, you can edit it. You can change or add information, or simply look at the settings. The information typed during the creation of the channel can be found in the sections **General settings**, **E-mail addresses**, **Security and authentication**, **Workflow** and **Advanced settings**.

## General settings

General settings

| | |
|---|---|
| ENABLED | ☐ |
| NAME * | Inbound - Mail@pureservice.local |
| TYPE | IMAP (Inbound) |
| HOST * | outlook.office365.com |
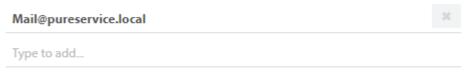
Here you set the **name** of the inbound channel, you will be shows what **type** of protocol was used during setup, and you set the **host** for the e-mail.
You can also **enable** or **disable** the channel.

## E-mail addresses

E-mail addresses

Mail@pureservice.local                                             ✕

Type to add...
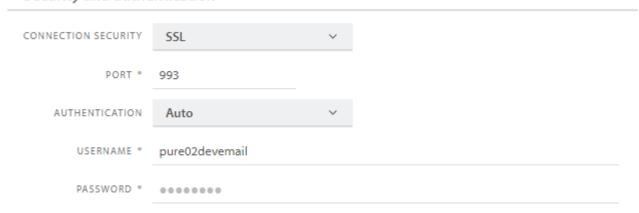
To avoid potential email looping, please fill out all email aliases associated with the email channel

This function is meant to work in conjunction with the ticket CC function. Any e-mail entered here will be recognized as an alias to itself, and thus will not send receipts to itself should both be added to cc by a customer.

# Security and authentication

Settings can vary depending on the individual setup.

The **username** and **password** requested is the login information to the email. This information is not updated automatically, so a common point of failure is when the password for the e-mail is changed but not updated here. This will cause Pureservice to be unable to create any tickets from the address.

# Workflow

**Workflow**

SET TICKET VISIBILITY    Visible

Ticket visibility is set on the ticket when created from this e-mail channel

SEND RECEIPT TO    End user and ticket recipients

When ticket is created from e-mail channel a receipt is sent the end user. You can also include ticket recipients to receive a separate receipt. Important! Max 20 ticket recipients will be added to ticket

ASSIGN TO    None

Optional: Automatically assign all requests created through this email channel to the selected department and team.

Workflows allows you to dictate how the system will handle any tickets created from incoming e-mails to this address.

**Set ticket visibility** sets the the customers visibility into the case from the Selfservice portal.
*Visible* gives the customer full insight into their case, and *visible without receipt-/solution e-mails* gives the same insight but does not send give the user any confirmation emails when the ticket is opened or closed.This workflow takes precedence over the standard workflows, and so with this setting no tickets created by this channel will send any receipt e-mail due to default workflows.
*Not visible* tickets will not send any receipt-/solution e-mails, and the customer will have no insight into the case from the Selfservice portal

**Send receipt to** is used together with ticket CC. It determines if the user creating the ticket is the only one who will get

a receipt mail, or if it should be sent to every e-mail added to ticket CC. By default only the end user will receive the receipt.

When this is set to *End user*, the workflow *E-mail user when Ticket is created* will be used.

When this is set to *End user and ticket recipients*, and the ticket has recipients, the workflow *E-mail user and ticket recipients (CC) when Ticket is created* will be used. In this case both the user creating the ticket and those added to recipients will <u>receive the same receipt from this workflow</u>. Remember to edit the template used accordingly.

For alternative configurations, see [Alternative configuration for Ticket CC](#).

**Assign to** automatically assigns any case created by this channel to the specified team.

# Advanced Settings

### Advanced settings

| READ FROM | Default inbox ⌄ |
|---|---|
| | Optional: Choose which folder to read emails from. |
| MOVE TO | Do not move ⌄ |
| | Optional: Choose which folder to move processed emails to. |
| CONNECTED | None ⌄ |
| | Optional: Connect to an outbound email channel. When the connected outbound email channel is preferred, Pureservice will reply using the connected channel for all requests created with this inbound email channel. |
| INCLUDE READ | ☐ |
| | ⚠ Optional: Create tickets from both read and unread emails in the selected email folder. If the folder contains elements you do not wish to create tickets from, please make sure you remove them before selecting this option. You will need to select a "Move to"-folder before using this feature. |
| PREFER "REPLY TO" | ☑ |
| | This setting prefers the email's "Reply to" email address as the sender when it exists rather than the email's original "From" email address. (Default is: On) |

**Read from** specifies from which folder Pureservice will create tickets. By default the tickets are created from the inbox. This is the simplest solution if the e-mail address is used solely for this purpose. Any e-mails in every other folder will be unaffected by Pureservice.

**Move to** allows you to move any e-mail from which a ticket is created to another specified folder.

**Connected** links the inbound channel to an outbound e-mail channel. With this every new message sent from a ticket created by this inbound channel will use the linked outbound channel.

**Include read** By default Pureservice only creates tickets based on unread e-mails. If this is enabled any e-mail that is placed in the folder will create a new ticket. The move to function must be enabled in order to use this function.
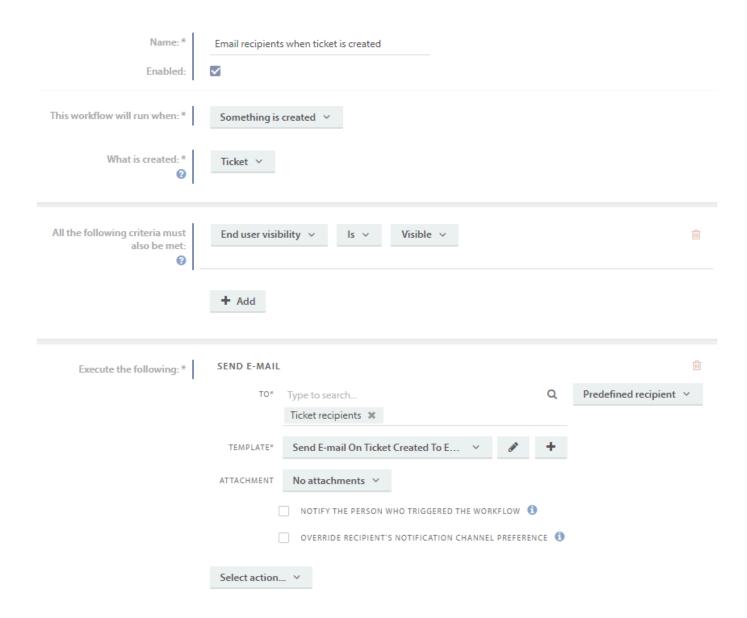
# Alternative configuration for Ticket CC

By default when someone is added to *Recipients*, if *end user and ticket recipients* are enabled in the inbound channel, both will receive the same receipt. This is managed by the workflow *E-mail user and ticket recipients (CC)* when the Ticket is created, and this uses the template *Send E-mail On Ticket Created To End User and Ticket Recipients (CC)*. This template will need to be edited accordingly.

Should you wish to change this setup so that the end user and recipients get different information, here are some ways to go about it.

## Alternate workflow for receipt mail

This solution requires knowledge of Workflows, [click here for more information on the topic](#)
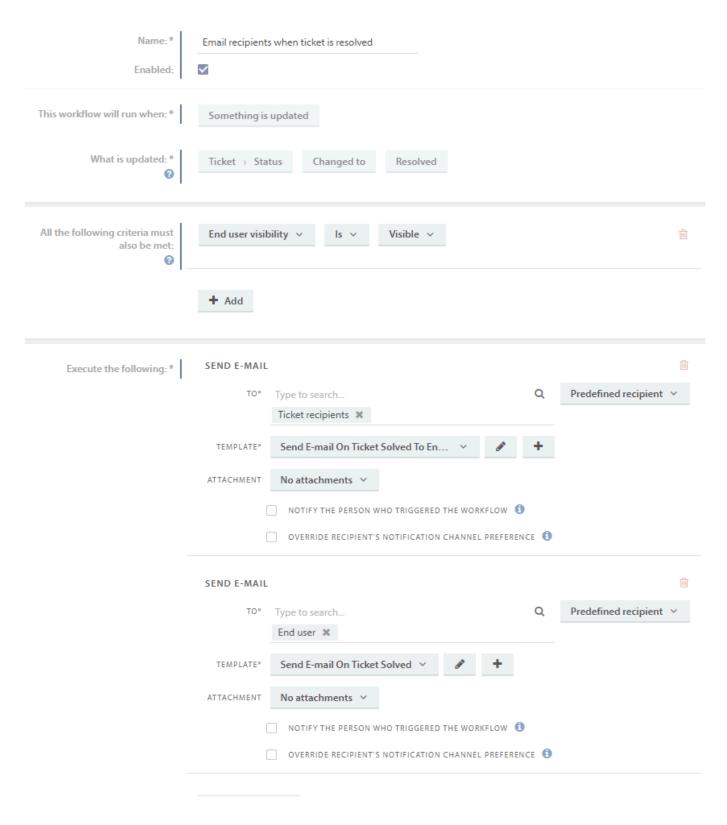
With this configuration, the above workflow will replace the default one. *E-mail user and ticket recipients (CC)* will therefore need to be turned **off**. When using this setup, the *Send Receipt to* setting must be set to *End user* on the inbound channel.

The function of this workflow is to check every ticket created if there are anything listed in the CC field. If there is, the selected template will be sent to those addresses. If there is nothing in the CC field, the workflow will still run but no

message will be sent as there are no recipients.

# Alternate workflow for solution mail

If you want the user and recipients to receive different receipts when a ticket is solved, a similar set up is required.

Name: *  Email recipients when ticket is resolved

Enabled:  ☑

This workflow will run when: *  Something is updated

What is updated: *  Ticket › Status    Changed to    Resolved
❓

All the following criteria must also be met:  End user visibility ˅    Is ˅    Visible ˅    🗑
❓

**+ Add**

Execute the following: *  SEND E-MAIL    🗑

TO*  Type to search...    🔍    Predefined recipient ˅

Ticket recipients ✖

TEMPLATE*  Send E-mail On Ticket Solved To En... ˅    ✏    ✚

ATTACHMENT  No attachments ˅

☐  NOTIFY THE PERSON WHO TRIGGERED THE WORKFLOW  ⓘ

☐  OVERRIDE RECIPIENT'S NOTIFICATION CHANNEL PREFERENCE  ⓘ

SEND E-MAIL    🗑

TO*  Type to search...    🔍    Predefined recipient ˅

End user ✖

TEMPLATE*  Send E-mail On Ticket Solved ˅    ✏    ✚

ATTACHMENT  No attachments ˅

☐  NOTIFY THE PERSON WHO TRIGGERED THE WORKFLOW  ⓘ

☐  OVERRIDE RECIPIENT'S NOTIFICATION CHANNEL PREFERENCE  ⓘ

As with the previous workflow shown, the system default workflow will need to be disabled to avoid duplicates. But unlike example above, this will also replace the workflow for the end user. As such, both *E-mail user when Ticket is resolved* and *E-mail user and ticket recipients (CC) when Ticket is resolved* must be disabled.

The function of this workflow is whenever a ticket is set to status solved, as long as it has visibility *Visible*, the selected templates will be sent. You may choose different templates for each, but its important to note that both these template will use the same solution.Therefore the solution to the ticket will be sent to all parties, but it will be possible to include information only the end user should have access to (such as survey links)

# Code words for communications in open tickets

The content of the *New E-mail On Ticket* template, which is responsible for the standard text sent to end users every time you create a **New Message**, can be changed depending on whether or not there are anyone added to ticket CC. This is done using code words.

```
{{#if (eq Communication.Current.RecipientsCc.Count 0)}} Message 1 else  Message 2
{{/if}}
```

With the above code words, you can change any amount of the template to reflect whether there is anyone added to ticket CC or not. If the CC field is blank, **message 1** will be shown. If it is not, **message 2** will be shown. Examples of this might include only adding the link to Selfservice portal to message 1, as those added to ticket CC would be unable to open it. Both messages can be any length, so you can enter the entirety of the template or part of it in the message fields depending on preference.

Its important to note that this will not change the text written in the **New Message** field. This will only change the standard text sent with every response.
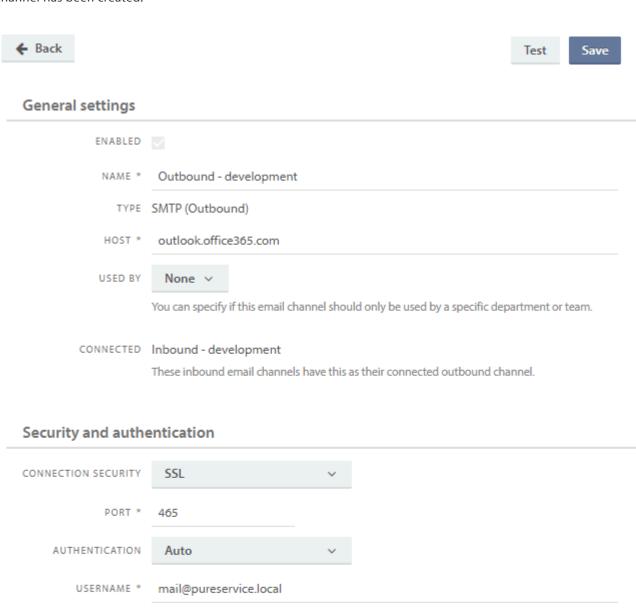
Here is an example of how the *New E-mail On Ticket* template might look after implementing code words



{{{Communication.Current.Text}}} will become the **New message** written in the specific ticket. If the CC field is empty, the message *You can click the following link to follow the progress on your case in the SelfService portal: https://www.pureservice.com/no/* will be displayed. If its not empty, the message *This ticket has been sent to multiple people involved with this ticket, and is meant to bring everyone up to speed will be displayed instead*. The *Kind regards* will not be affected by whether the ticket CC field is empty or not.

# Edit outbound email channel

The settings in the sections **General settings**, **Security and authentication** and **Sender details** are the same as those entered when creating an outbound email channel. As with inbound channels, you can edit these settings after the channel has been created.

← Back                                                                    Test    Save

### General settings

ENABLED ☑

NAME * Outbound - development

TYPE SMTP (Outbound)

HOST * outlook.office365.com

USED BY None ∨

You can specify if this email channel should only be used by a specific department or team.

CONNECTED Inbound - development

These inbound email channels have this as their connected outbound channel.

### Security and authentication

CONNECTION SECURITY SSL ∨

PORT * 465

AUTHENTICATION Auto ∨

USERNAME * mail@pureservice.local

PASSWORD * ••••••••

### Sender details

SENDER EMAIL mail@pureservice.local
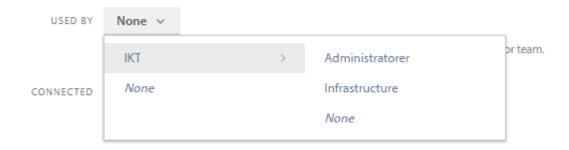
Sets the From e-mail address for all outgoing messages. Leave blank to use the server default. NOTE: This may not take effect depending on your mail server and settings.

SENDER NAME Pureservice Development

Sets the From name for all outbound messages. Leave blank to use the server default. NOTE: This may not take effect depending on your mail server and settings.

# Used by

You can specify if this email channel should only be used by a specific department or team. Click on the **Used by** drop-down menu to choose a department or team. By default this is set to **None**.
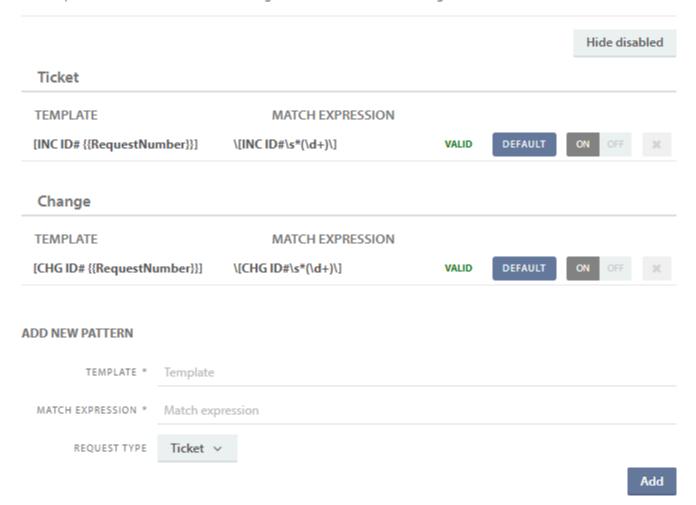
# Patterns

Email channels use patterns to recognize which tickets to modify. Pureservice comes with a default pattern out of the box.

**Channel Patterns**

**Configure channel patterns**

Recognition patterns are used by email accounts to recognize what ticket/change to modify. Outbound messages will have a specific reference. This reference will again be used on inbound messages.

Hide disabled

**Ticket**

| TEMPLATE | MATCH EXPRESSION | | | |
|---|---|---|---|---|
| [INC ID# {{RequestNumber}}] | \[INC ID#\s*(\d+)\] | VALID | DEFAULT | ON  OFF  ✕ |

**Change**

| TEMPLATE | MATCH EXPRESSION | | | |
|---|---|---|---|---|
| [CHG ID# {{RequestNumber}}] | \[CHG ID#\s*(\d+)\] | VALID | DEFAULT | ON  OFF  ✕ |

**ADD NEW PATTERN**

TEMPLATE *    Template

MATCH EXPRESSION *    Match expression

REQUEST TYPE    Ticket ⌄

Add

# Template

When Pureservice sends an email to a user from a ticket, Pureservice uses the pattern to create a unique phrase. The phrase is added to the subject field of the outbound email. If a user changes or removes the generated phrase when replying, Pureservice will not be able to recognize the pattern.

The default pattern template creates a phrase that looks like this for Tickets [INC ID# 123], where "123" is the ticket number.

**{{RequestNumber}}** is a mandatory placeholder in the template.

# Match Expression

The match expression is used when searching for a pattern match in the subject. If there is a match, the application will connect the email to the appropriate ticket. If not, Pureservice will treat the email like a new request and create a new ticket.

A match expression is created by a regular expression (Regex), which is a special text string for describing a search pattern. You can read more about it here: regexr.com
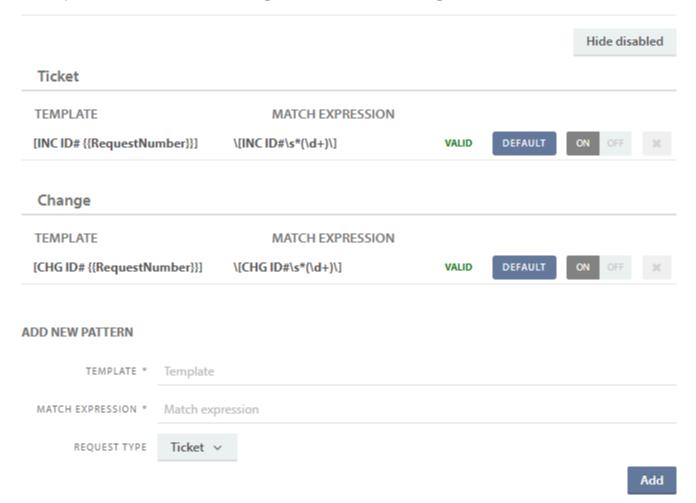
# Add new pattern

The template and match expression are validated against each other and need to match. If the validation fails, an error message is displayed and Pureservice does not save the pattern.

## Channel Patterns

### Configure channel patterns

Recognition patterns are used by email accounts to recognize what ticket/change to modify. Outbound messages will have a specific reference. This reference will again be used on inbound messages.

Hide disabled

### Ticket

| TEMPLATE | MATCH EXPRESSION | | | | |
|---|---|---|---|---|---|
| [INC ID# {{RequestNumber}}] | \[INC ID#\s*(\d+)\] | VALID | DEFAULT | ON OFF | ✕ |

### Change

| TEMPLATE | MATCH EXPRESSION | | | | |
|---|---|---|---|---|---|
| [CHG ID# {{RequestNumber}}] | \[CHG ID#\s*(\d+)\] | VALID | DEFAULT | ON OFF | ✕ |

### ADD NEW PATTERN

| TEMPLATE * | Template |
|---|---|
| MATCH EXPRESSION * | Match expression |
| REQUEST TYPE | Ticket ⌄ |

Add

✱ We recommend that you keep the old pattern for a while if you have an active system, and want to create a new pattern. This will ensure that Pureservice recognizes emails and connects them to the correct requests when customers respond to mails already sent out from Pureservice.

# SMS

An outbound SMS channel can now be configured in Pureservice to enable agents to send messages on tickets by SMS.
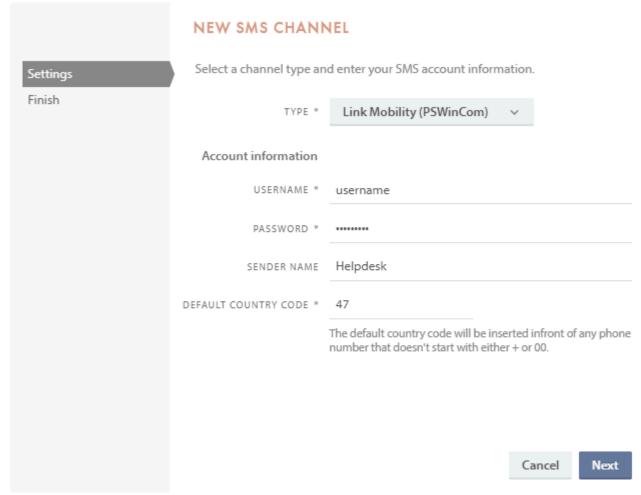


## Hide Disabled
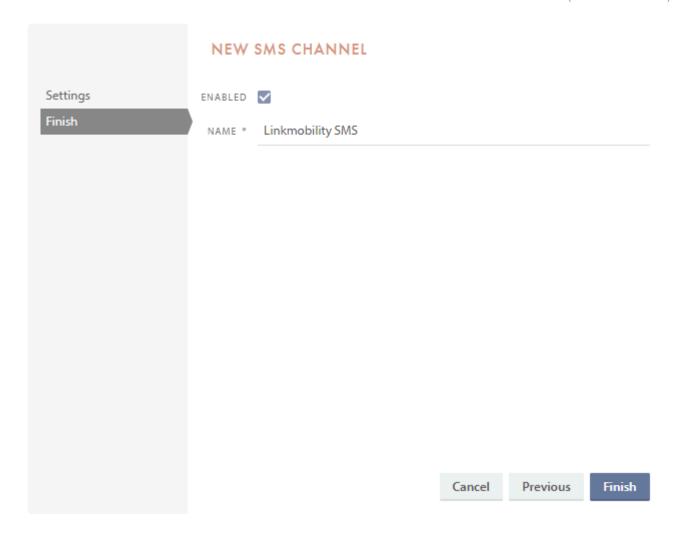
Hide sms channels that are disabled, to only show enabled channels.

# Add new SMS channel

To create a new channel, click "Add" in the upper right corner and follow the wizard

**NEW SMS CHANNEL**

Settings

Finish

Select a channel type and enter your SMS account information.

TYPE *    Link Mobility (PSWinCom) ⌄

Account information

USERNAME *    username

PASSWORD *    ••••••••

SENDER NAME    Helpdesk

DEFAULT COUNTRY CODE *    47

The default country code will be inserted infront of any phone number that doesn't start with either + or 00.

Cancel    Next

Finish configuration by giving the new channel a name and enabling it if you're ready to begin using it

**NEW SMS CHANNEL**

Settings

Finish

ENABLED ☑

NAME *    Linkmobility SMS

Cancel    Previous    Finish
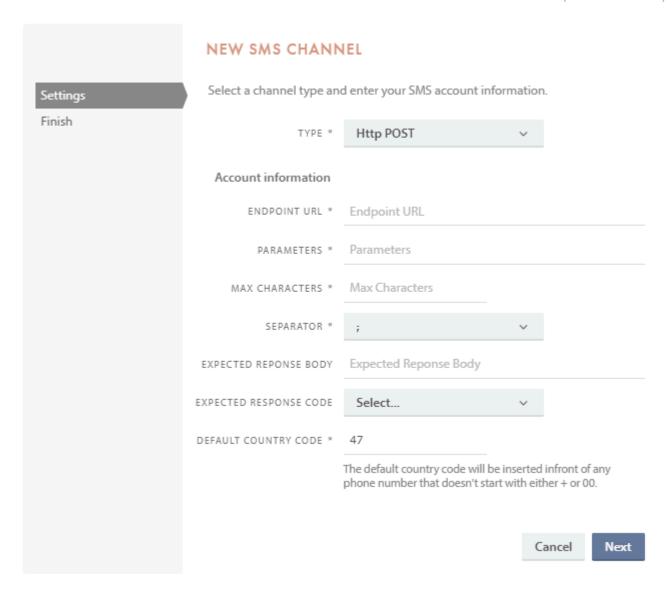
**HTTP POST**

If your service provider isn't listed, you have the option to connect to it by HTTP POST, shown below.
You will need to know the providers endpoint address for this type of connection.

The following parameters might also come in handy:

- destination: to
- content: text

Endpoint URL from the example below will of course need to be the real URL to your provider:

## NEW SMS CHANNEL

Select a channel type and enter your SMS account information.

TYPE *    Http POST      ⌄

### Account information

ENDPOINT URL *    Endpoint URL

PARAMETERS *    Parameters

MAX CHARACTERS *    Max Characters

SEPARATOR *    ;      ⌄

EXPECTED REPONSE BODY    Expected Reponse Body

EXPECTED RESPONSE CODE    Select...      ⌄

DEFAULT COUNTRY CODE *    47

The default country code will be inserted infront of any phone number that doesn't start with either + or 00.

[ Cancel ] [ Next ]

After you have created a HTTP POST channel, two more settings appear "Proxy" and "Country code prefix". These settings can also be found by clicking on the configuration button on a existing HTTP POST channel.

← Back    **HTTP POST SMS**                                    **Save**

## General settings

ENABLED ☑

NAME *    HTTP POST SMS

TYPE    Http POST - Outbound

DEFAULT COUNTRY CODE *    47

## Details

ENDPOINT URL *    Endpoint URL

Use the template placeholder "{{To}}" in the endpoint url to represent the recipient number and "{{Text}}" for the SMS text. Example: https://smsservice/send?number={{To}}&message={{Text}}.

PROXY    Proxy

Optional: Configures a proxy if required by your environment.

PARAMETERS *    Parameters

Use the template placeholder "{{To}}" in the parameters to represent the recipient number and "{{Text}}" for the SMS text. Example: number={{To}}&message={{Text}}.

MAX CHARACTERS *

SEPARATOR *    ;                    ⌄

Enter a character to separate recipients with when there is more than one. The default character is ';'.

COUNTRY CODE PREFIX *    +                    ⌄

Select preferred country code prefix, the default is "+". This function replaces "00" or "+" at the start of the phone number with what is configured here.

EXPECTED REPONSE BODY    Expected Reponse Body

EXPECTED RESPONSE CODE    Select...    ⌄

# Two-way SMS channel

To create a two-way SMS channel, you will have to edit an existing channel. So far, Vianett is the only supported service provider for this.

← **Back**   Vianett SMS

**Save**

## General settings

ENABLED ☑

NAME *   Vianett SMS

TYPE   ViaNett - Outbound

DEFAULT COUNTRY CODE *   47

The default country code will be inserted infront of any phone number that doesn't start with either + or 00.

ENABLE SMS-DIALOGUE ☑

INCOMING WEBHOOK   http:/███████████████████████████mT   📋

ⓘ The Vianett connection must be configured to use this endpoint as the HTTP URL. This endpoint is used to process inbound messages and must be available from the Internet to work properly. This setting is found in your Vianett connections administration page.

ⓘ The Vianett connection must be configured to use the HTTP POST method. This setting is found in your Vianett connections administration page.

## Advanced settings

PROXY   Proxy

Optional: Configures a proxy if required by your environment.

## Security and authentication

USERNAME *   syscom

PASSWORD *   •••••••••••••••••

## Sender details

NUMBER   Number

Optional: Sets the from number for all outgoing SMS messages. Leave blank unless your organization owns a 5-digit number for two way usage.

SIGNATURE

200 characters left

Optional: Enter signature text to append at the end of all outgoing sms messages.
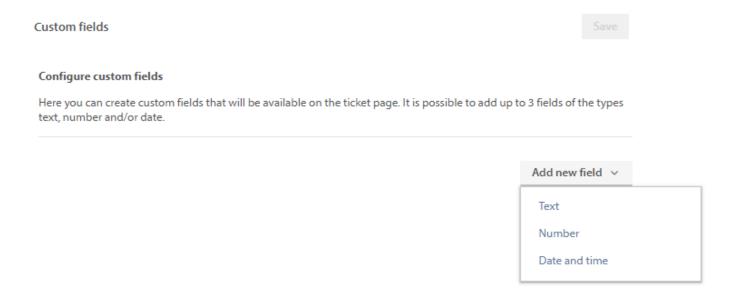
The **incoming webhook** will have to be pasted into Vianett's connections administration page.

# Company

Here you will find documentation relevant for the setting on the Company page

# Custom fields

Here you can create custom fields for companies that will be available on the company page. It is possible to add up to 3 fields of the types text, number and/or date. Custom fields can also be used within lists and filters.

**Custom fields**                                                    Save

**Configure custom fields**

Here you can create custom fields that will be available on the ticket page. It is possible to add up to 3 fields of the types text, number and/or date.

Add new field ⌄

Text

Number

Date and time

To add a new custom field, select one of three types of custom fields: **Text**, **Number** or **Date and time**.

**Account number**          ID: CF_1 (TEXT)    Not required         ⌄    ⓘ    ✖

                                               Not required

                                               Required

                                               Required when creating

Here you can create a name for the custom field and select one of the three requirements for the custom field:

| Option | Explanation |
| --- | --- |
| Not required | The field is not required **(chosen by default)** |
| Required | The field is required when agents create the company, or if any changes is being made |
| Required when creating | The field is required when agents create a new company, but existing companies can be edited without filling inn the field |

This configures how the custom field are validated on companies. The choice will only apply when agents create or change companies and not when they are created or changed via API or other sources.

| ≡ | **Environment** | ID: CF_1 (TEXT) | Required when creating | ⌄ | ⓘ | ✖ |
| ≡ | **Account number** | ID: CF_4 (NUMBER) | Required | ⌄ | ⓘ | ✖ |
| ≡ | **Contract expiration** | ID: CF_7 (DATE AND TIME) | Not required | ⌄ | ⓘ | ✖ |

Above is an example of how three configured custom fields can look. The unique identifiers **(ID: CF_x)** will also be shown after creation.

# Downloads

Here you can download extra utilities that some advanced features in Pureservice may require.

Pureservice Connect is currently the only application available here.

# Pureservice Connect

This application allows Pureservice to start local applications such as Remote Desktop Connection.

This can be used in combination with (and is required for) the SCCM 2012 R2 Remote control function and/or remote control with "Remote control"-configured asset fields (Action button set to Type: Remote control).

# FAQ

**✳** This feature must be enabled by an Administrator before it can be used.

The FAQ (Frequently Asked Questions) functions were introduced in version 3.0.15880.

There are currently two primary ways of using FAQ articles; as message or solution templates, and/or published on the Selfservice portal for end users to see.
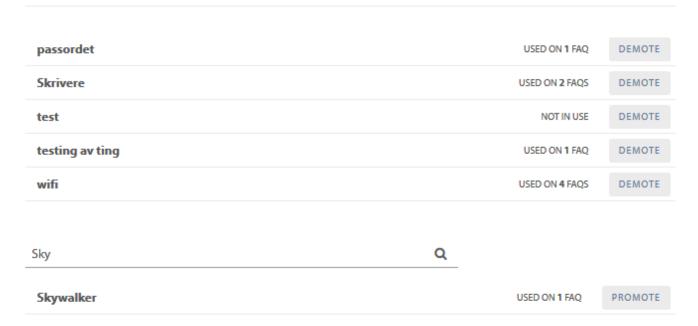
Most of the functions can be found and used via the Agent Console (the  button in the sidebar) and while working on a ticket, but management of *Category tags* must be done by an Administrator from here.

# Category tags

## Category tags

### Configure category tags

Configure tags to be used as categories in Selfservice. FAQs that have these tags will appear grouped with the name of the category tag as heading.

| | | |
|---|---|---|
| **passordet** | USED ON **1** FAQ | DEMOTE |
| **Skrivere** | USED ON **2** FAQS | DEMOTE |
| **test** | NOT IN USE | DEMOTE |
| **testing av ting** | USED ON **1** FAQ | DEMOTE |
| **wifi** | USED ON **4** FAQS | DEMOTE |

| Sky | 🔍 |
|---|---|

| | | |
|---|---|---|
| **Skywalker** | USED ON **1** FAQ | PROMOTE |

FAQ articles can be assigned one or more tags to make it easier for users to find them. These are created/added through the FAQ module ( button in the sidebar of the Agent Console).

These tags can in turn be promoted to *Category tags* to be used as categories in Selfservice. FAQs that have these tags will appear grouped with the name of the category tag as heading. Already-promoted tags can also be demoted back to a regular tag if wanted.

Here you can also see how many FAQ articles have the relevant tag(s) assigned which is useful to decide if a tag should be promoted or demoted.

## Promoting a tag to *Category tag*

Use the search field to find the relevant tag and click the `PROMOTE` button next to the name.
The tag will then appear in the list above as a Category tag.

## Demoting a tag to a regular tag

Locate the relevant Category tag in the list and click the `DEMOTE` button next to the name.
The tag will then disappear from the list and has been changed to a regular tag.

# General

General information about the helpdesk and system statuses are published in this section.

## Releases

Click on **Releases** to view bug fixes, latest available releases and features, etc.

## System status

In Pureservice, several services run in the background. These services handle scheduled workflows, send emails, etc. To view the status of each service, simply click on **System status**.

## Features

Here you can configure visibility of the different application features. Reload the application to view the changes.

## System requirements

**Application server:** Windows Server 2008 SP2 ×64 or newer, CPU Dual-Core 2.33GHz (min.), .NET Framework 4.7 (min.), 8GB RAM and 100GB storage. Increase available RAM and CPU resources if more than 10 concurrent agents.
**SQL server:** It is recommened to use an already-existing SQL server. Windows Server 2008 SP2 ×64 or newer, CPU Quad-Core 2.33GHz (min.), 16GB RAM and 100GB (per approximately 100.000 tickets) storage.

# Apps

Pureservice can be configured to integrate with external systems.

## Apps

### Configure apps

Pureservice has a set of predefined apps. You can enable or disable the apps in the list. Apps have configurable settings, click the tools button to make your changes.

### Standard

**User information**

If turned on this app is available as a widget for agents in the widget side panel on tickets.

`ON` `OFF`

**Company information**

If turned on this app is available as a widget for agents in the widget side panel on tickets.

`ON` `OFF`

**Latest tickets**

If turned on this app is available as a widget for agents in the widget side panel on tickets.

`ON` `OFF`

### Installed

*No items*

### Available

**SCCM 2012 R2**

This app will connect Pureservice to your Microsoft SCCM server making it possible to view detailed end-user computer information inside tickets. The app becomes available to agents as a selectable widget in the sidebar on tickets.

**Pureservice 2**

This app connects to an instance of Pureservice 2 and make it possible to view and navigate to previous incidents the end-user has reported. The app becomes available to agents as a selectable widget in the sidebar on tickets.

**Links**

In this app you can setup multiple links to external resources. This may be a URL or run local files. The app becomes available to agents as a selectable widget in the sidebar on tickets.

# Standard

These are the standard apps available. Standard apps can be turned on or off for all users.

# Installed

This is a list of currently configured apps

# Available

This is a list of apps available for configuration. More apps will likely be added in the future.

Available apps are:

- SCCM 2012 R2
- Pureservice 2
- Links
- Jira

# SCCM 2012 R2
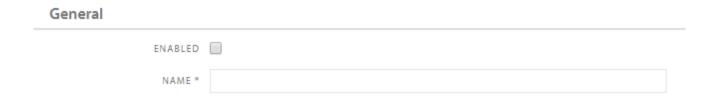
✱ The SCCM database needs to be available from the application server for successful connection to the SCCM app.

Microsoft System Center Configuration Manager (SCCM) 2012 R2, formerly Systems Management Server (SMS) is a systems management software product developed by Microsoft for managing large groups of computers running Windows NT, Windows Embedded, macOS (OS X), Linux or UNIX, as well as Windows Phone, Symbian, iOS and Android mobile operating systems. Configuration Manager provides remote control, patch management, software distribution, operating system deployment, network access protection and hardware and software inventory.

## General

Here you can give the app a unique name of your chosing. You can also enable or disable the app.

General

ENABLED ☐

NAME * [                                        ]

## Options

This is where you setup the connection details and/or which information you would like to display in the app.

✱ In the fields **Database Server Name** and **Database Name**, write the name of the SCCM database server and the SCCM database name. Not Pureservice.

## Options

| | |
|---|---|
| DATABASE SERVER NAME * | Database server name |
| DATABASE NAME * | Database name |
| SQL SERVER AUTHENTICATION | ☐ |

If the user running the Pureservice Application Pool on IIS does not have permissions to connect to the database, please check "SQL Server Authentication" and provide valid credentials here.

| | |
|---|---|
| CPU | ☐ |
| HARD DRIVE | ☐ |
| MEMORY | ☐ |
| SOFTWARE | ☐ |

Please choose the information you want the integration to display.

**Remote Control**                 **Download Pureservice Connect** ⬇

| | |
|---|---|
| ENABLED | ☐ |

✳ This app requires **Primary User** to be set on the objects in the SCCM database
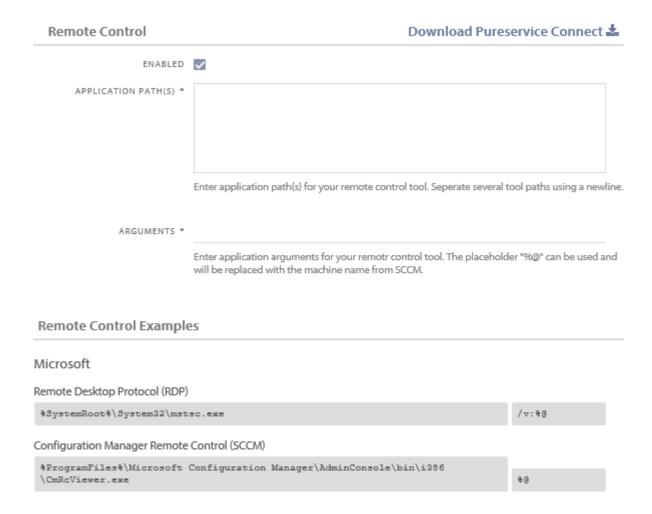
# Remote Control

If enabling this option, agents will be able to remote control end users with the Pureservice Connect.

# Remote control

## Remote control

This is where you enter the **application path(s)** for your remote control tool(s). If you have more than one, separate the paths by **Enter**



## Download Pureservice Connect

The Pureservice Connect app can be downloaded from either the SCCM app settings or from the Administration menu

# Pureservice 2

This app connects to an instance of Pureservice 2 and make it possible to view and navigate to previous incidents the end-user has reported. The app becomes available to agents as a selectable widget in the sidebar on tickets.

## General

Here you can give the app a unique name of your chosing. You can also enable or disable the app.

General

ENABLED ☐

NAME *

This name is used as title for the widget available for agents in the widget sidebar on tickets.

## Options

This is where you setup the connection details.

Options

PURESERVICE 2 URL *

DATABASE SERVER NAME *

DATABASE NAME *

SQL SERVER AUTHENTICATION ☐

If the user running the Pureservice Application Pool on IIS does not have permissions to connect to the database, please check "SQL Server Authentication" and provide valid credentials here.

# Links
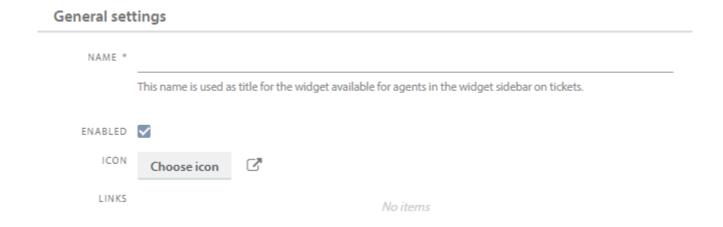
In this app you can setup multiple links to external resources. This may be a URL or run local files. The app becomes available to agents as selectable widget in the sidebar on tickets.
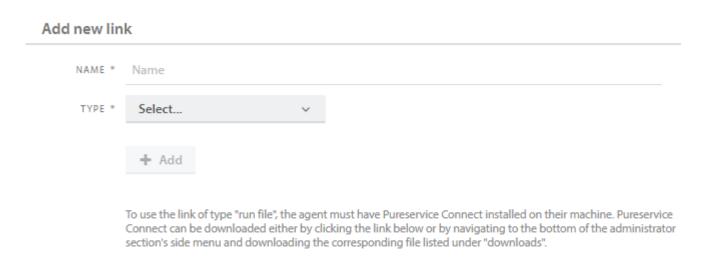
## General settings

Here you can give the app a unique name and choose an icon. You can also enable or disable the app.



## Add new link
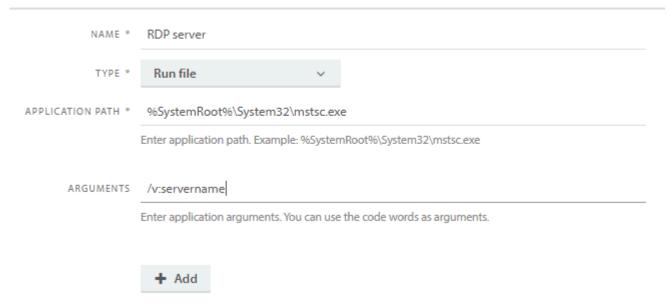
This is where you set up the link details.



Link types to choose from are **URL** and **Run file**. By choosing **Run file**, you can for example create a link for agents to easily connect remotely to a server.

**Add new link**

| | |
|---|---|
| NAME * | RDP server |
| TYPE * | Run file ▼ |
| APPLICATION PATH * | %SystemRoot%\System32\mstsc.exe |

Enter application path. Example: %SystemRoot%\System32\mstsc.exe

| | |
|---|---|
| ARGUMENTS | /v:servername |

Enter application arguments. You can use the code words as arguments.

**＋ Add**

More examples on how to use this is available in the link setup.
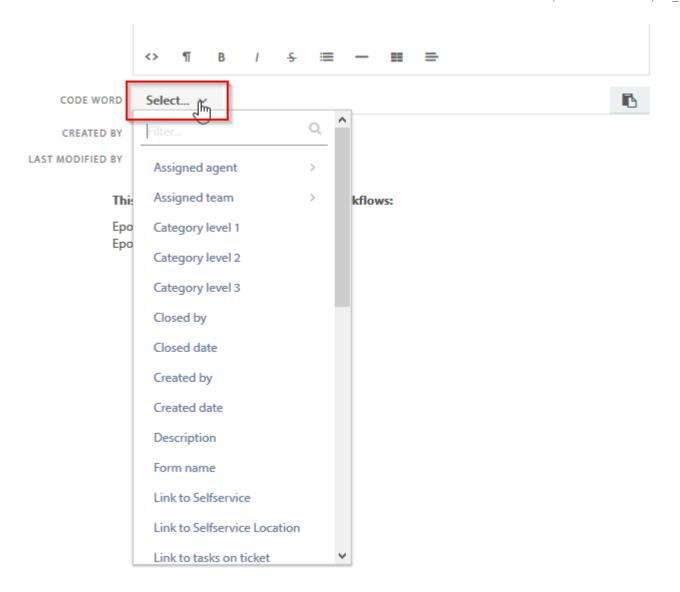
> ✱ To use the link of type "run file", the agent must have Pureservice Connect installed on their machine. Pureservice Connect can be downloaded either by clicking the link below or by navigating to the bottom of the administrator section's side menu and downloading the corresponding file listed under "downloads".

# Remote Control Examples

Here you can see a few examples of code words you can use.
You can use any "Ticket" code word (the ones starting with "{{Ticket.") and the live list of valid code words can be found by editing a Ticket template under Administrator -> Workflow -> Templates:

| | | | |
|---|---|---|---|
| Send E-mail On Ticket Assigned | TICKET | 🔧 | ✕ |
| Send E-mail On Ticket Assigned Team | TICKET | 🔧 | ✕ |
| Send E-mail On Ticket Created | TICKET | 🔧 | ✕ |

CODE WORD

CREATED BY

LAST MODIFIED BY

This                                     kflows:

Epo
Epo

| Filter... | 🔍 |

| Assigned agent | › |
| Assigned team | › |
| Category level 1 | |
| Category level 2 | |
| Category level 3 | |
| Closed by | |
| Closed date | |
| Created by | |
| Created date | |
| Description | |
| Form name | |
| Link to Selfservice | |
| Link to Selfservice Location | |
| Link to tasks on ticket | |

# Jira

This app integrates with Jira and adds the possibility to link, comment and view issue information from Jira. If enabled, issues may also be created in Jira from this app.
The integration between Jira and Pureservice requires technical configuration in both ends.
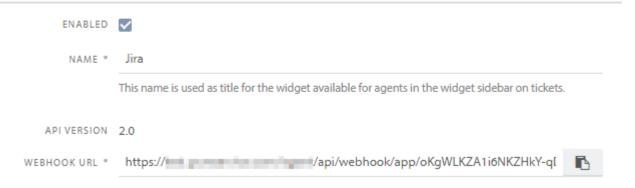
## Setup in Pureservice

### General

- **Enabled:** enable or disable the app
- **Name:** Here you can give the app a unique name of your choosing. This name is used as title for the widget available for agents in the widget sidebar on tickets.
- **API version:** The Jira API version that is supported
- **Webhook URL:** URL to Pureservice that needs to be set in Jira. This field will only be available after the information is saved.



### Options

This is where you setup the connection details. Fields marked with a star are mandatory fields.

- **Server URL:** Jira URL
- **Customfield (for ID):** «Custom Field» created in Jira for Pureservice ticket numbers. Example: "customfield_10807"
- **Customfield (for URL):** «Custom Field» created in Jira for link to the Pureservice ticket. If more than one ticket is connected, the ticket that was connected last will be shown. Example: "customfield_10808"
- **Metadata JQL filter:** JQL (Jira Query Language) filter that is used for filtering metadata. It is possible to filtrate on specific projects and/or types in Jira. The result decides what is possible to choose in the «New Jira» dialogue.
- **Username and password**: This must be a user that at least has access to the relevant project(s) in Jira and access to "Assign Issues" if you want this option in Pureservice.
  The password needed here is an API-key. More information on how to create API-keys are found [here](here)

## Options

| | |
|---|---|
| SERVER URL * | |
| CUSTOMFIELD (FOR ID) * | |
| CUSTOMFIELD (FOR URL) | |
| METADATA JQL FILTER | issuetypeNames=Bug |
| USERNAME * | |
| PASSWORD * | |

> ✳ All actions done on Jira issues through the Jira app in Pureservice will appear to have been made by the account used in the app setup

## Creation of issues in Jira from Pureservice

- **Allow:** If enabled, agents are allowed to create new issues in Jira from Pureservice.
- **Allow attachments:** If enabled, agents are allowed to attach attachments to the new Jira issue from Pureservice.
- **Allow assignment:** If enabled, agents are allowed to assign the new Jira issue to an agent.

### Creation of issues in Jira from Pureservice

| | |
|---|---|
| ALLOW | ☑ |
| ALLOW ATTACHMENTS | ☑ |
| ALLOW ASSIGNMENT | ☑ |

## Display issues from Jira in Pureservice

- **Allow comments:** If enabled, agents are allowed to read existing and create new comments in the Jira issue.
- **Show link to Jira:** If enabled, agents are able to see the URL to the Jira issue. If the Pureservice agents don't have access to Jira, this can be turned off.
- **Show assignee:** If enabled, agents can see who the Jira issue is assigned to.

### Display issues from Jira in Pureservice

| | |
|---|---|
| ALLOW COMMENTS | ☑ |
| SHOW LINK TO JIRA | ☑ |
| SHOW ASSIGNEE | ☑ |

# Setup in Jira

> ✳ Please refer to Jira's own documentation and/or support for questions/issues not directly related to Pureservice.

## User and rights

The Jira app in Pureservice requires authentication with a user account with at least access to the relevant project(s). Access to "Assign Issues" is required as well if you enable this option in Pureservice.
We recommend creating a service account specifically used for this (for example named "Pureservice 3").

## CustomFields

One (mandatory) or two (optional) custom fields must be created in Jira that Pureservice populates with the Pureservice ticket ID(s) (mandatory) and the Pureservice URL (optional).
The **Pureservice ID** field needs to have **Text Field (single line)** type, and the **Pureservice URL** a **URL Field** type.
These values are needed before you can finish the app setup in Pureservice.

## Jira -> Pureservice WebHook

> ✳ This is required if you want actions in Jira to trigger actions in Pureservice such as notifications, emails and/or internal notes. Having this set up also makes the app view "live" which means information shown in the app will change/appear if changes are made in Jira without having to refresh manually.

A webhook that triggers on **Issue updated** is needed, and you may create several using the same Pureservice webhook for different actions.
This is done in the Jira Settings under System -> Advanced -> WebHooks.

**URL**

The URL is where you define what will happen when the issue is updated.
Following is a table containing some of the available parameters that can be used with the Pureservice webhook.

| Name | Value | Explanation | Required |
|------|-------|-------------|----------|
| id | ${issue.id} | | Yes |
| key | ${issue.key} | | Yes |
| summary | Text (URL formated) | Subject of notification and/or email in Pureservice | No |
| details | Text (URL formated) | Body of notification and/or email in Pureservice | No |
| note | Text | Body of Internal Note in Pureservice | No |
| notify | 1 / 0 | Notification will be sent if "1" to the case owner | No |
| email | 1 / 0 | Email will be sent if "1" to the case owner | No |
| emailEndUser | 1 / 0 | Email will be sent if "1" to the end user | No |

Following is a table of Jira variables (also known as code words) that can be used.

| Variable | Explanation |
|---|---|
| {{issue.key}} | Issue key |
| {{issue.id}} | Issue ID |
| {{issue.fields.summary}} | Issue summary |
| {{issue.fields.priority.name}} | Issue priority |
| {{issue.fields.status.name}} | Issue status |
| {{issue.fields.issuetype.name}} | Issue type |
| {{issue.fields.assignee.name}} | Issue assignee name |
| {{issue.fields.assignee.displayName}} | Issue assignee display name |
| {{issue.fields.reporter.name}} | Issue reporter name |
| {{issue.fields.reporter.displayName}} | Issue reporter display name |
| {{issue.fields.resolution.name}} | Issue reolution name |
| {{issue.fields.resolution.description}} | Issue resolution description |
| {{user.name}} | Change caused by name |
| {{user.displayName}} | Change caused by display name |
| **If comment added event** | |
| {{comment.body}} | Comment body |
| {{comment.author.name}} | Comment author name |
| {{comment.author.displayName}} | Comment author display name |
| {{comment.updateAuthor.name}} | Comment update author name |
| {{comment.updateAuthor.displayName}} | Comment update author display name |
| **If issue change event** | |
| {{changelog.items}} (use with #each) | Array of changed |
| field | Field that was changed |
| fromString | Original field string value |
| toString | Current field string value |

Following is a few examples of how the parameters of the URL may look (must be URL encoded!):

**Notify agent when Priority in Jira has changed**:
?id=${issue.id}&key=${issue.key}&summary=Priority+changed+in+Jira&details=Priority+changed+to+%7B%7Bissue.fields.priority
**Notify and Email agent when Priority in Jira has changed**:
?id=${issue.id}&key=${issue.key}&summary=Priority+changed+in+Jira&details=Priority+changed+to+%7B%7Bissue.fields.priority
**Create Internal Note when Priority in Jira has changed**:

?id=${issue.id}&key=${issue.key}&note=Priority+changed+to+%7B%7Bissue.fields.priority.name%7D%7D+in+Jira+by+%7B%7Bus

## Event filter (JQL query)

The JQL (Jira Query Language) query in this section, right below the URL, is how to specify what issues the webhook will affect. A generally good idea is to limit it to issues with the relevant customfield and is written "**cf[customfieldID] is not EMPTY**" where "customfieldID" would be the correct customfield ID in your environment.
Please refer to Jira's documentation for more advanced setups.

# ServiceNow

This app integrates with ServiceNow and adds the possibility to create a case in ServiceNow from an existing ticket, including messages, internal notes and attachments.
The integration between ServiceNow and Pureservice requires technical configuration in both ends.

## Setup in Pureservice

### General

- **Enabled:** Enable or disable the app
- **Always on:** If enabled, the ServiceNow-app will always be visible in the ticket sidebar.
- **Name:** Here you can give the app a unique name of your choosing. This name is used as title for the widget available for agents in the widget sidebar on tickets.

General

| | |
|---|---|
| ENABLED | ☑ |
| ALWAYS ON | ☐ |
| NAME * | |

This name is used as title for the widget available for agents in the widget sidebar on tickets.

### Options

This is where you setup the connection details. Fields marked with a star are mandatory fields.

- **URL:** The URL for your ServiceNow site
- **Username and password**: The credentials for a ServiceNow user.

Options

| | |
|---|---|
| URL * | |
| USERNAME * | |
| PASSWORD * | |

✳ All actions done on ServiceNow issues through the ServiceNow app in Pureservice will appear to have been made by the account used in the app setup

# Setup in ServiceNow

You need to create an API-key that ServiceNow needs to create tickets in Pureservice. Here is a link to the Pureservice manual regarding API-keys

After configuration is complete, please note the app id. This id can be found in the URL: /agent/app#/administration/ general/app/{{app id}}. This id is also needed in ServiceNow.

You also need a default user that tickets will be assigned to. Please fetch the user id from the URL in the user screen: agent/app#/user/{{user id}}/information.

The same goes for the default department. Navigate to this URL: /agent/app#/administration/security/departments, pick a department (not team), and select the department id from the URL: /agent/app#/administration/security/ department/{{department id}}

The last thing you'll need is the URL of your pureservice instance. It looks something like this: https://{{customer name}}.pureservice.com/

❋ Please refer to ServiceNow's own documentation and/or support for questions/issues not directly related to Pureservice.

# Documaster

This app integrates with Documaster and allows you to archive tickets that have achieved a certain status configured in the app.

## Setup in Pureservice

### General

**Enabled:** Enable or disable the app

**Always on:** If enabled, the Documaster-app will always be visible in the ticket sidebar.

**Name:** Give the app a unique name. This name is used as title for the widget available for agents in the widget sidebar on tickets.
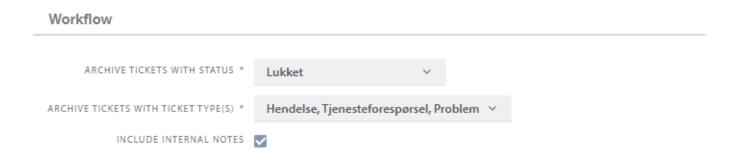


### Workflow

**Archive tickets with status:** When a ticket is saved with the selected status, it will automatically be sent to Documaster for archiving.

**Archive tickets with ticket type(s):** Only the selected ticket types are subject to archiving.

**Include internal notes:** If this is checked, tickets that are archived to Documaster will include internal notes that have been added to the ticket.

# Options

These IDs and URLs will be generated during installation of Documaster and can be obtained from a Documaster system administrator.

**Options**

| | |
|---|---|
| ADMINISTRATIVE UNIT * | |
| FOND ID * | |
| SERIES ID * | |
| CLASSIFICATION SYSTEM ID * | |
| PRIMARY CLASS ID * | |
| APPLICATION URL * | Eg: https://example.com |
| SERVER ADDRESS * | Eg (with port): https://example.com:8083 |

# Authentication

Get this information from Documaster or your administrator.
If you wish to set up with an external IDP such as Azure AD, Documaster has a separate guide for how to set this up named "Integration-Azure Active Directory Authentication".

**External IDP:** The field indicates whether you use an external identity provider, such as Azure AD. The alternative is to use the internal IDP in Documaster.

**Identity Provider URL:** Identifier for identity provider, either external or internal.

**Client ID and Secret:** This is login information on the Documaster-site.

**Authentication**

| | |
|---|---|
| EXTERNAL IDP | ☐ |
| IDENTITY PROVIDER URL * | |
| CLIENT ID * | |
| CLIENT SECRET * | |
| USERNAME * | |
| PASSWORD * | |

# HTML-Panel

This app can be configured to display a custom HTML-panel. The app becomes available to agents as a selectable widget in the sidebar on tickets.

## Genreal

**Enabled:** Enable or disable the app

**Always on:** If enabled, the HTML-app will always be visible in the ticket sidebar.

**Name:** A unique name for the app. This name will be used as a title for the ticket sidebar widget

**Icon:** Choose which icon you want to represent the app in the sidebar panel.

General

ENABLED ☑

ALWAYS ON ☐

If "always on" is selected, this app will always be visible to all agents in the widget sidebar on tickets, with no option to remove it.

NAME *

This name is used as title for the widget available for agents in the widget sidebar on tickets.

ICON

Choose icon

## App template

The app template determines what the app looks like for agents. Use code words and template logic to format the content as you wish. The app template can contain valid HTML code. It will be added to our body, so HTML tags, head tags and body tags should not be included.

## App template

# HTTP-Request

The HTTP-request app can be used to issue HTTP-request and display the response in the ticket app-sidebar by showing the response's content in an app template, using HTML and handlebars (https://handlebarsjs.com/). The maximum allowed response content size from the HTTP-request is 5MB. Enabling "Run automatically" will cause the app to re-render when navigating to a ticket or from one ticket to another.

## Genreal

**Enabled:** Enable or disable the app

**Always on:** If enabled, the HTTP-app will always be visible in the ticket sidebar.

**Name:** A unique name for the app. This name will be used as a title for the ticket sidebar widget

**Icon:** Choose which icon you want to represent the app in the sidebar panel.

General

ENABLED ☑

ALWAYS ON ☐
If "always on" is selected, this app will always be visible to all agents in the widget sidebar on tickets, with no option to remove it.

NAME *
This name is used as title for the widget available for agents in the widget sidebar on tickets.

ICON

Choose icon

## Options
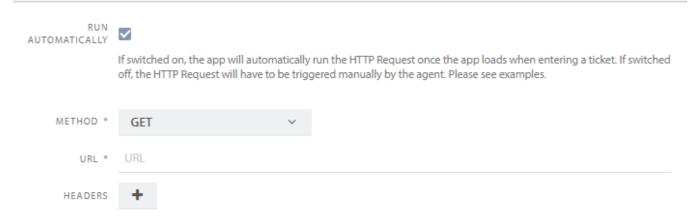
**Run automatically:** If turned on, the HTTP call will run automatically when the app is opened on a ticket.
**Method:** Choose which HTTP verb you want to use. Here you can choose between GET, POST and PUT.
**URL:** Enter the URL you want the app to make an HTTP call to.
**Headers:** Fill in any headers you wish to add.

## Authentication

Set the authentication method to be used to access the resource.



## OAuth 2.0

We have the option of retrieving an access token from an external authorization server, if desired. One can use the Client Credentials Grant (https://www.rfc-editor.org/rfc/rfc6749#section-4.4) to authenticate by filling in the following parameter:
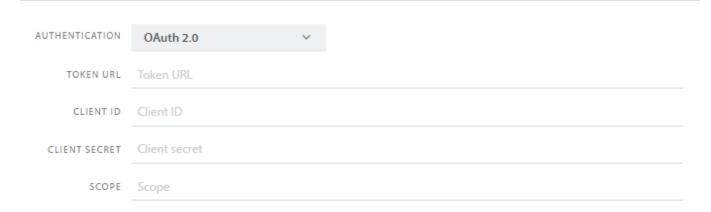
**Token URL:** URL to the authorization server, which supports OAuth 2.0.
**Client-ID:** Identifier for our client in the authorization server
**Client Secret:** A secret, defined in the authorization server, which provides access to the endpoint to be called.
**Scope:** It is optional to specify scope and the value is determined by how the authorization server is configured.

# App template

The app template determines what the app looks like for agents. Use code words and template logic to format the result og the HTTP request as you wish. The app template can contain valid HTML code. It will be added to our body, so HTML tags, head tags and body tags should not be included.

**App template**

# Features
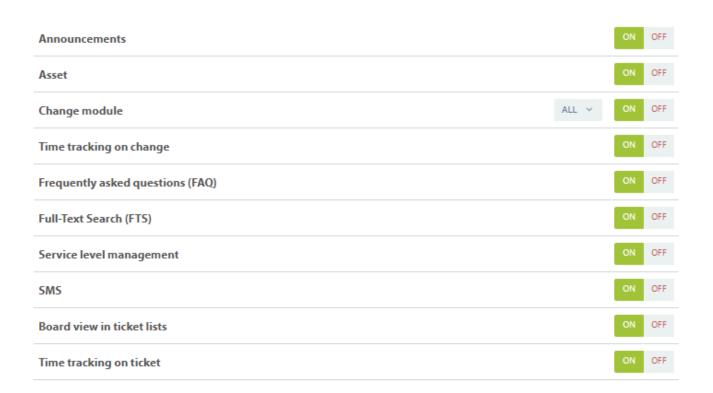
Here you can configure visibility of the different application features. Reload the application to view the changes.

**Features**

**Configure features in Pureservice**

Turn functionality in Pureservice on or off. For the change module, choose which interaction zones it is enabled for. You may have to reload Pureservice in the browser for changes to be visible.

| | | |
|---|---|---|
| Announcements | | ON OFF |
| Asset | | ON OFF |
| Change module | ALL ∨ | ON OFF |
| Time tracking on change | | ON OFF |
| Frequently asked questions (FAQ) | | ON OFF |
| Full-Text Search (FTS) | | ON OFF |
| Service level management | | ON OFF |
| SMS | | ON OFF |
| Board view in ticket lists | | ON OFF |
| Time tracking on ticket | | ON OFF |

## Announcements

**Announcements** must be ON to use the related features.
Having this turned OFF will make all the related features unavailable.

## Asset

The **Asset** feature must be ON to use the related features.
Having this turned OFF will make all the related features unavailable.

## Change module

The **Change module** must be ON to use the related features.
This will make all Change related features available/unavailable such as creating and handling Change requests and using Change lists.

# Time tracking on change

The **Time tracking on change** feature must be ON to use the related features.
Having this turned OFF will make all the related features unavailable.

# Frequently asked questions (FAQ)

**Frequently asked questions (FAQ)** must be ON to use the related features.
Having this turned OFF will make all the related features unavailable.

# Full-Text Search (FTS)

Enabling **Full-Text Search (FTS)** improves logic and performance when searching for ticket, change, faq, asset, user and company with the commander.
This feature is enabled for all SaaS instances. *Full-text and semantic extractions for search* must enabled on the SQL server to use this with an on premise instance.

# Service level management

**Service level management** must be ON before configuring the SLM settings and using the related features.
We recommend leaving this ON if you have enabled it before and have started using the SLM teatures.
Having this turned OFF will make all the related features unavailable.

**SMS**

The **SMS** feature must be ON to use the related features such as configuring SMS channels and sending/receiving SMS.
Having this turned OFF will make all the related features unavailable.

# Board view in ticket lists

The **Board view in ticket lists** feature must be ON to use the related ticket view.
Having this turned OFF will make all the feature unavailable.
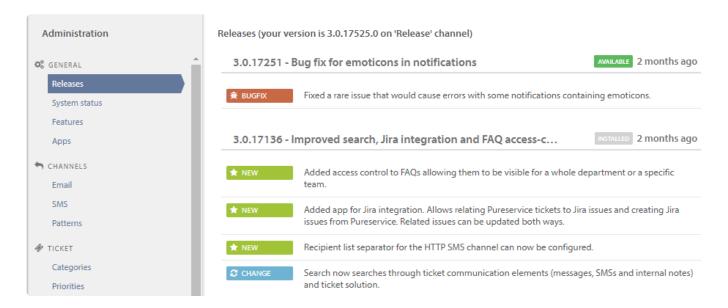
# Time tracking on case

The **Time tracking on case** feature must be ON to use the related features.
Having this turned OFF will make all the related features unavailable.

# Releases

The picture below illustrates how general information and releases are displayed in the console.



## Installed vs Available

Installed releases are marked with [INSTALLED] , while available releases, which have not been installed yet, are marked with [AVAILABLE] .

If your environment is hosted by Pureservice (*.pureservice.com), and there are any *available* releases in your list, please contact Pureservice Support.

If your Pureservice is installed locally and there are any *available* releases in your list, you can check on your Pureservice server when they are scheduled for installation. You find **Pureservice continuous delivery** in **Task scheduler** on your Pureservice server. Right click and choose **Run** for the installation to start immediately. Installation will make Pureservice unavailble for a short time.
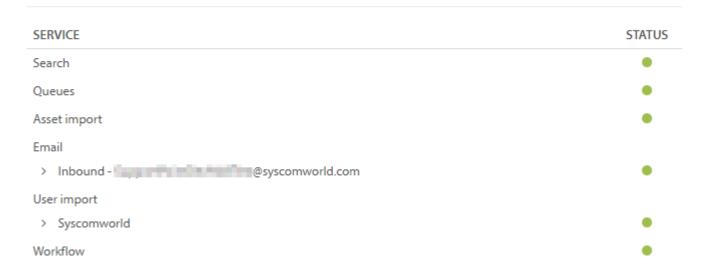
# System status

Services in Pureservice are listed in the **System status** page. The list contains the most recent status reports, and is updated and refreshed every 30 seconds.

### System status

#### System status overview

Pureservice has several underlying services running through the Worker-service. This page gives you an overview of each service's current status. You can select red statuses to view the error details.

| SERVICE | STATUS |
|---|---|
| Search | ● |
| Queues | ● |
| Asset import | ● |
| Email | |
|   &gt;  Inbound - █████████████@syscomworld.com | ● |
| User import | |
|   &gt;  Syscomworld | ● |
| Workflow | ● |
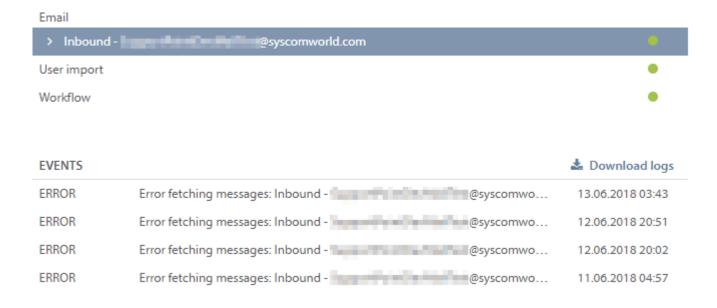
## Status color

A service's status color indicates its state:

- **Green** indicates that a service has **Started** and/or is **Working**
- **Gray** indicates that a service has **Stopped**
- **Red** indicates that there is an **Error**

## Events

Clicking on a service, regardless of the status color, will open the **Events** section. If the chosen service has any earlier events, a detailed error log is displayed in the section.

Email

> Inbound - ▓▓▓▓▓@syscomworld.com ●

User import ●

Workflow ●

EVENTS ⬇ Download logs

| ERROR | Error fetching messages: Inbound - ▓▓▓@syscomwo... | 13.06.2018 03:43 |
| ERROR | Error fetching messages: Inbound - ▓▓▓@syscomwo... | 12.06.2018 20:51 |
| ERROR | Error fetching messages: Inbound - ▓▓▓@syscomwo... | 12.06.2018 20:02 |
| ERROR | Error fetching messages: Inbound - ▓▓▓@syscomwo... | 11.06.2018 04:57 |

You can export the events by clicking **Download logs**. This will create a csv file.

# Services

Which services are listed depends on whether Pureservice is installed on-premise or in the cloud.

## On-premise

- Search engine
- Queues
- Asset import
- Email
- User import
- Workflow

## In the Cloud

- Search engine
- Queues
- Asset import
- Email
- Workflow

The **Asset import** and **Email** services display one row for each import/channel.

# Maintenance

In the maintenance section you can clean up the database and check for undelivered emails.

# Cleanup

Over time, different departments and teams may become obsolete and have no purpose in Pureservice. This section describes how you can remove them by using wizards.

## Cleanup

### Clean up the database

Many objects in Pureservice will not be possible to delete if they are depended upon by other objects. Here you will find guides to help you clean up and remove objects that are not tied down by dependencies. Objects that are tied down can either be disabled, or removed after manually removing any dependencies on them.

| | |
|---|---|
| Remove unused teams | START... |
| Remove unused departments | START... |
| Delete or recover tickets marked for deletion | START... |
| Delete or recover assets marked for deletion | START... |
| Delete or recover FAQ's marked for deletion | START... |
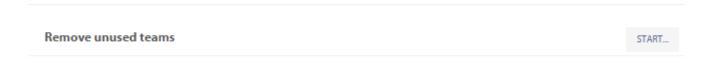
# Requirements

For a department or team to be deletable, it cannot be related to other objects in Pureservice. This means that a department cannot be deleted if it contains one or more teams, and a team cannot be deleted if it contains one or more users.
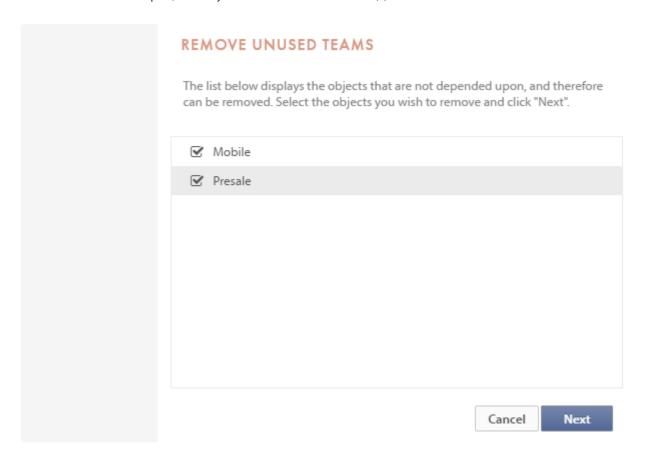
For a ticket to be deletable, it first has to be marked for deletion in the ticket list. The same goes for assets and FAQ's.

# Remove unused teams
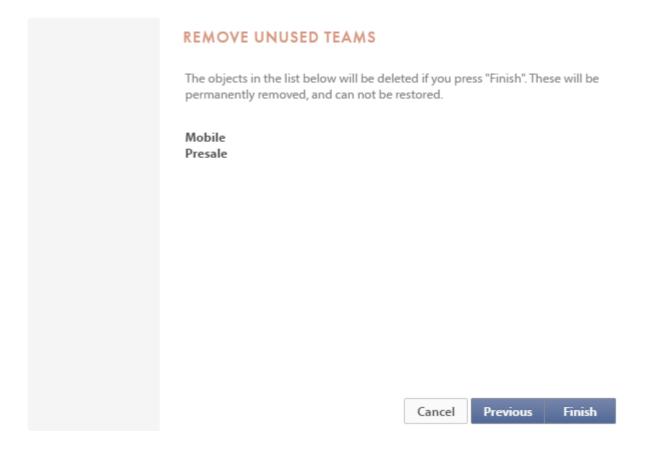
Press the "Start" button to remove unused teams.



A modal window will open, where you can choose which team(s) to remove.



Select the team(s) you would like to remove in the list and proceed to the confirmation step by pressing the "Next" button.

**REMOVE UNUSED TEAMS**

The objects in the list below will be deleted if you press "Finish". These will be permanently removed, and can not be restored.

**Mobile**
**Presale**

Cancel    Previous    Finish

The chosen team(s) will be listed in the next window. If you need to make any changes regarding which team(s) to delete, press the "Previous" button. To proceed and delete the team(s) in the list, press "Finish". Once a team has been deleted, it cannot be restored.
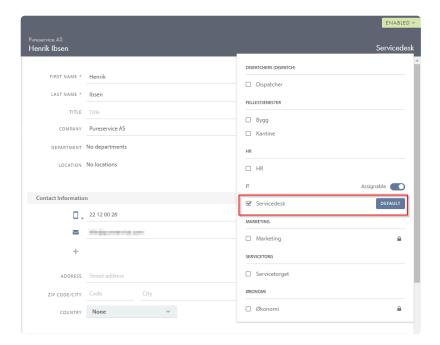
✱ If you should have trouble finding the desired team you want to delete from the list, all connection to the team must be removed.
Under is a small list you can use to more easily see the remaining connections to the team.
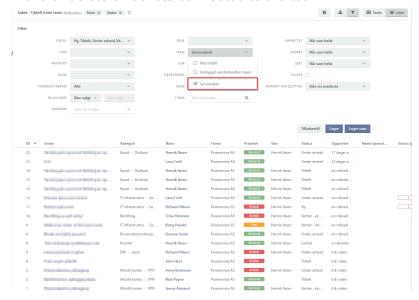
# Connections to remove from a team

In this list, team Servicedesk is used as an example to demonstrate where you can find the different connection.
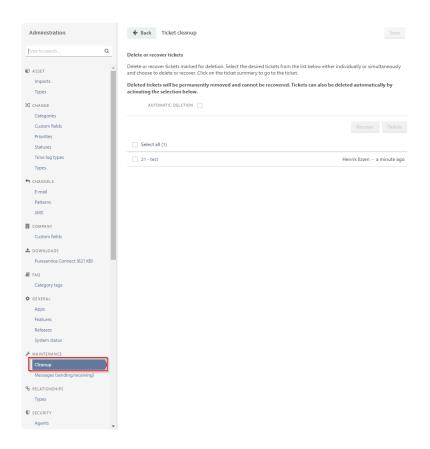
- Remove all agents and administrators connected to the team
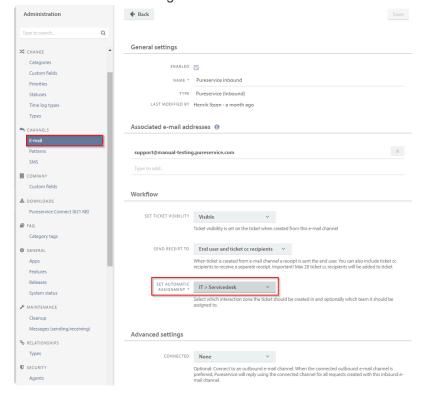
- Move or delete all tickets connected to the team
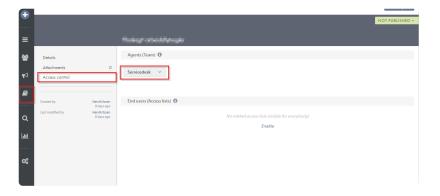


- Remove the teams tickets that are marked for deletion
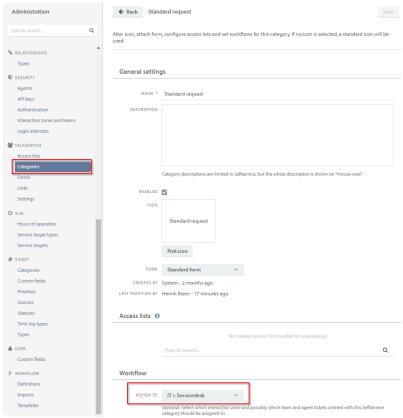
- Remove automatic assignment to the team from email channel settings
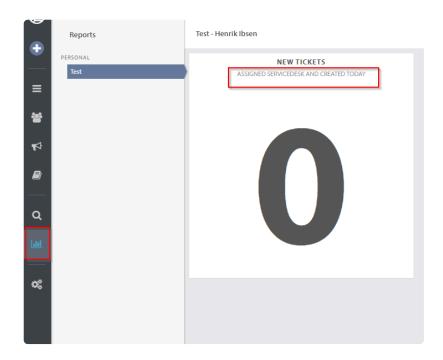


- Remove FAQ access for the team
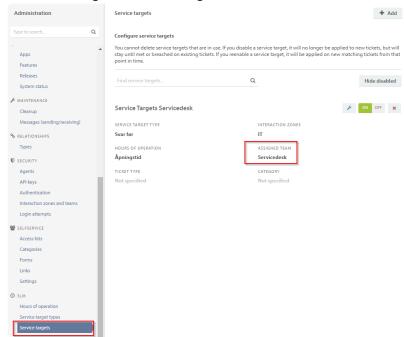
- **Remove automatic assignment to the team in Selfservice categories**



- **Remove team from reports**
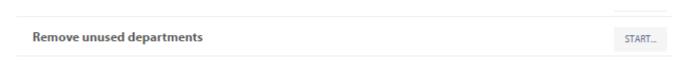
- Remove assigned service targets
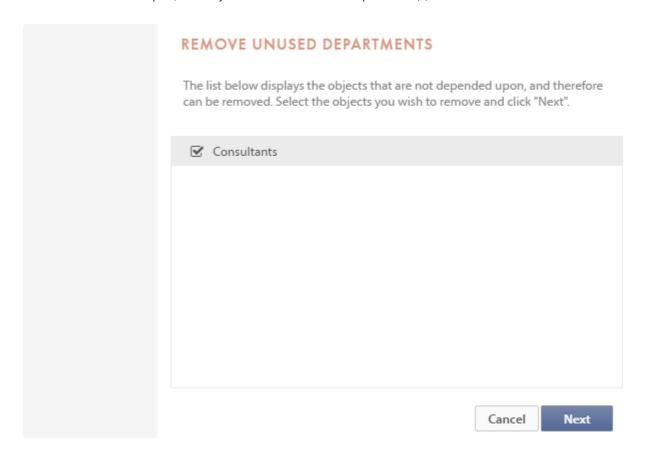
# Remove unused departments
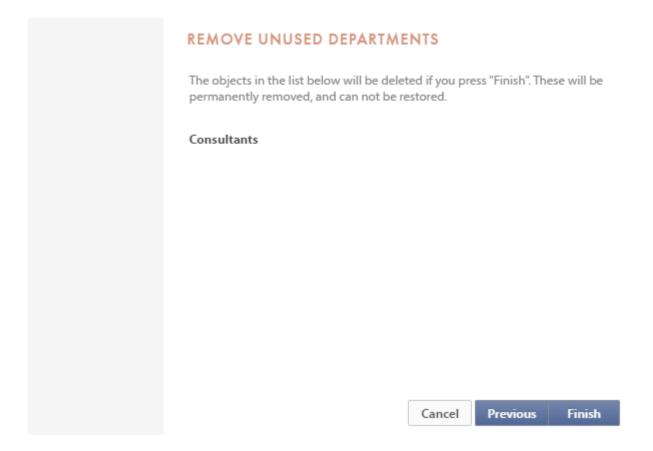
Press the "Start" button to remove unused departments.

**Remove unused departments**                                                          START...

A modal window will open, where you can choose which department(s) to remove.

**REMOVE UNUSED DEPARTMENTS**

The list below displays the objects that are not depended upon, and therefore can be removed. Select the objects you wish to remove and click "Next".

☑ Consultants

Cancel          Next

Select the department(s) you would like to remove in the list and proceed to the confirmation step by pressing the "Next"-button.

**REMOVE UNUSED DEPARTMENTS**

The objects in the list below will be deleted if you press "Finish". These will be permanently removed, and can not be restored.

**Consultants**



The chosen department(s) will be listed in the next window. If you need to make any changes regarding which department(s) to delete, press the "Previous" button. To proceed and delete the department(s) in the list, press "Finish". Once a department has been deleted, it cannot be restored.
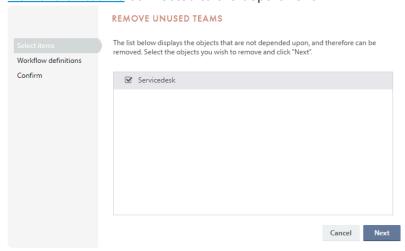
✱ If you should have trouble finding the desired department you want to delete from the list, all connection to the department must be removed.
Under is a small list you can use to more easily see the remaining connections to the department.
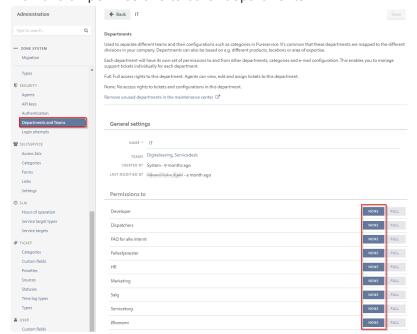
# Connections to remove from a department

In this list, department IT is used as an example to demonstrate where you can find the different connection.
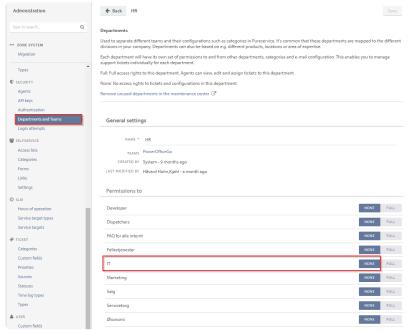
- Remove all teams connected to the department



REMOVE UNUSED TEAMS

The list below displays the objects that are not depended upon, and therefore can be removed. Select the objects you wish to remove and click "Next".

☑ Servicedesk
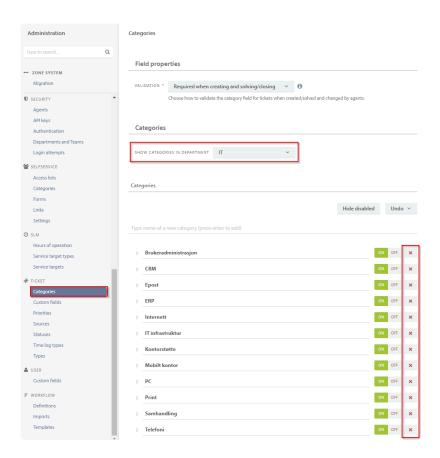
- Remove all permissions to other departments
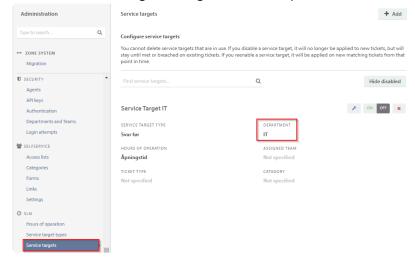


- Other departments must remove all their permissions to the department



- Remove all ticket and change categories specific to the department

- **Remove service targets assigned to the department**

# Delete or recover tickets marked for deletion
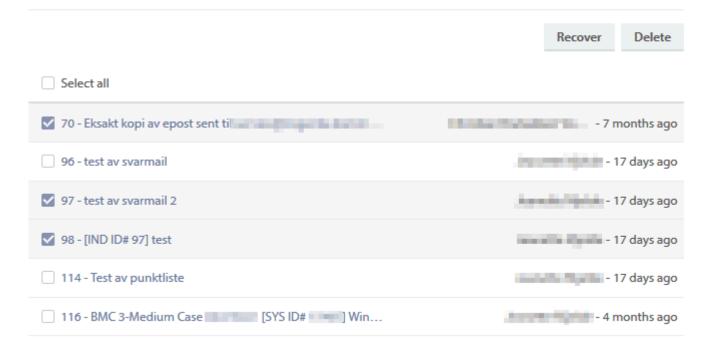
To delete tickets permanently you need to mark their checkboxes and click **Delete**

***NB! There is no recovery of the tickets after this point. They will be purged from the database***



To recover tickets you mark the checkboxes and click **Recover**

## Automatic deletion

Pureservice can automatically delete any items after being marked for a specified number of days. Check of the Automatic deletion box, and a field will come up with the set number of days.

# Delete or recover assets marked for deletion

To delete assets permanently you need to mark their checkboxes and click **Delete**

***NB! There is no recovery of the assets after this point. They will be purged from the database***

**Delete or recover assets**

Delete or recover assets marked for deletion. Select the desired assets from the list below either individually or simultaneously and choose delete or recover. Click on the asset name to go to the asset.

**Deleted assets will be permanently removed and cannot be recovered**

| | | Recover | Delete |
|---|---|---|---|
| ☐ Select all | | | |
| ☑ jjuc\enadm (PC1325) | | - 2 months ago | |
| ☐ jjuc\enadm (PC-1333) | | - 2 months ago | |
| ☑ DBR Test (DBR Test) | | - 2 months ago | |
| ☑ dbr (dbr test2) | | - 2 months ago | |
| ☐ DELLxxx (34-17-AD-71-BA-47) | | - 2 months ago | |

To recover assets you mark the checkboxes and click **Recover**

## Automatic deletion

Pureservice can automatically delete any items after being marked for a specified number of days. Check of the Automatic deletion box, and a field will come up with the set number of days.

AUTOMATIC DELETION ☑

DAYS AS MARKED BEFORE
PERMANENT DELETION *        14

# Delete or recover FAQ's marked for deletion

To delete FAQ's permanently you need to mark their checkboxes and click **Delete**

***NB! There is no recovery of the FAQ's after this point. They will be purged from the database***

**Delete or recover FAQ's**

Delete or recover FAQ's marked for deletion. Select the desired FAQ's from the list below either individually or simultaneously and choose delete or recover. Click on the FAQ name to go to the FAQ.

**Deleted FAQ's will be permanently removed and cannot be recovered.**

|  |  | Recover | Delete |
|---|---|---|---|
| ☐ Select all |  |  |  |
| ☐ VPN setup (2) | Harold Mathews - now |  |  |

To recover FAQ's you mark the checkboxes and click **Recover**

## Automatic deletion

Pureservice can automatically delete any items after being marked for a specified number of days. Check of the Automatic deletion box, and a field will come up with the set number of days.

| AUTOMATIC DELETION | ☑ |
|---|---|
| DAYS AS MARKED BEFORE PERMANENT DELETION * | 14 |
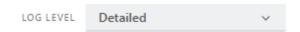
# Logging

Administrators can specify a log level for the application's log targets. Changing the log level can be quite useful when troubleshooting.
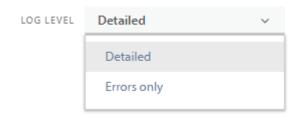
Logging

**Configure log targets**

Configure log level for logging in the application. Warning: "Detailed" level may produce large logs. Remember to set levels back to "Errors only" when detailed logging is no longer needed.

LOG LEVEL | Detailed ⌄

There are two different log levels: **Detailed** and **Errors only**

LOG LEVEL | Detailed ⌄

Detailed

Errors only

Detailed produces the most log output, while Errors only produces the least amount of output.

✳ We recommend that the log level is set to Errors only, unless troubleshooting an issue.
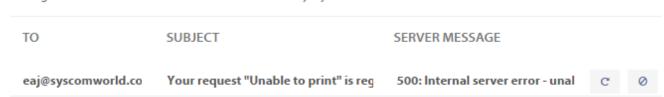
# Undelivered messages

Sometimes, an error might occur when sending an email, causing the delivery to fail. A vast number of reasons could cause the error. Pureservice will try to deliver an email up to five times over a timespan of two hours. If this process is unsuccessful, the system stores the email in the maintenance center and sends a notification to the owner of the undelivered email.

**Undelivered Email**

**Retry delivery of failed emails**

Unfortunately, sometimes the delivery of emails fails. This could be caused by a vast number of reasons and a detailed message is available in the "Server message" column. If delivery of an email has failed, you have the option of retying delivery by clicking the retry button in the list. You may also choose not send the email and ignore the error by clicking the ignore button. Note: Pureservice will automatically try to deliver the email five times the first two hours.

| TO | SUBJECT | SERVER MESSAGE | | |
|---|---|---|---|---|
| eaj@syscomworld.co | Your request "Unable to print" is reg | 500: Internal server error - unal | ⟳ | ⊘ |

Undelivered emails with error codes are listed in the maintenance center, with the columns **to**, **subject** and **server message**. By clicking ⟳ , we mark an email as "pending send". When the workflow for sending emails runs, the system will try to send the email again.

# Relationships

Here you can define your relationship types. A relationship type is either a standard relationship or a "solving"-relationship. A standard relationship can contain relationships between ticket types and change types. A "solving"-relationship does only contain relationships between ticket types. Tickets related through a "solving"-relationship will have a parent/child relation. A parent can send messages/internal notes to related children, and solving a parent can also solve related children.

> ✱ Relationships to assets must be configured through asset types.

## Relationship types

### Configure relationship types
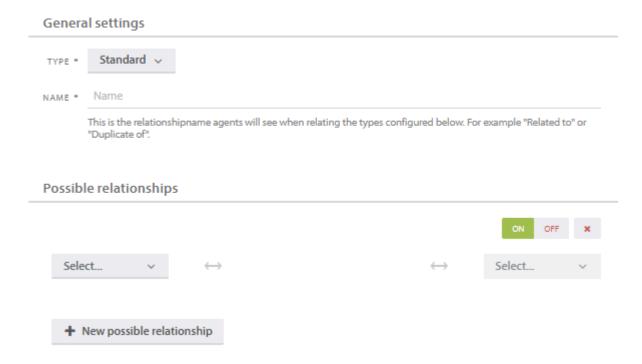
Here you can define your relationship types. A relationship type is either a standard relationship or a "solving"-relationship. A standard relationship can contain relationships between ticket types and change types. A "solving"-relationship does only contain relationships between ticket types. Tickets related through a "solving"-relationship will have a parent/child relation. A parent can send messages/internal notes to related children, and solving a parent can also solve related children.

Relationships to assets must be configured through asset types. ⬀
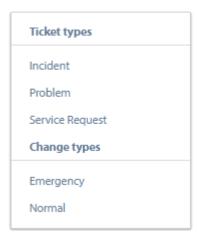
|  |  | Hide disabled |  |  |
| --- | --- | --- | --- | --- |
| Solves | ACTIVE: 1 / 1 | 🔧 | ✖ |
| Related to | ACTIVE: 1 / 1 | 🔧 | ✖ |

# Standard relationship

When creating a standard relationship type, you will need to choose a name. This is the relationshipname agents will see when relating the types configured.

**General settings**

TYPE *   Standard ⌄

NAME *   Name

This is the relationshipname agents will see when relating the types configured below. For example "Related to" or "Duplicate of".

**Possible relationships**

ON   OFF   ✕

Select...  ⌄   ⟷   ⟷   Select...  ⌄

**+ New possible relationship**
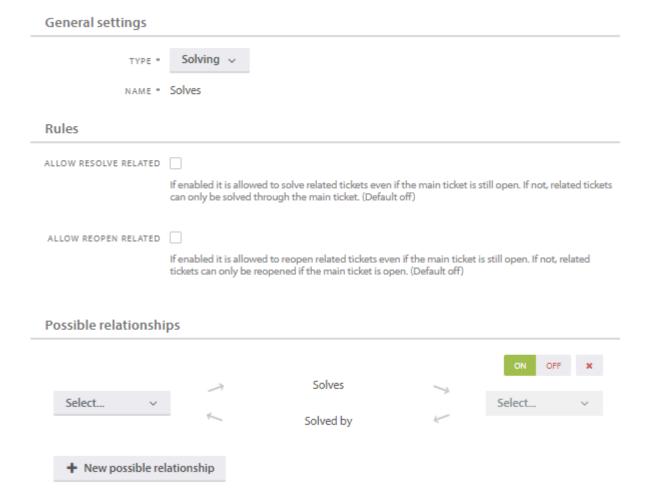
The drop down list shows all the ticket types and change types that you can choose from.

**Ticket types**

Incident

Problem

Service Request

**Change types**

Emergency

Normal
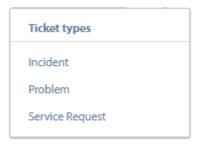
# Solving relationship

When creating a solving relationship type, you can choose which rules will apply:

- **Allow resolve related**: If enabled, it is allowed to solve related tickets even if the main ticket is still open. If not, related tickets can only be solved through the main ticket. The default setting is off.

- **Allow reopen related**: If enabled, it is allowed to reopen related tickets even if the main ticket is still open. If not, related tickets can only be reopened if the main ticket is open. The default setting is off.



The drop down list shows all the ticket types that you can choose from.
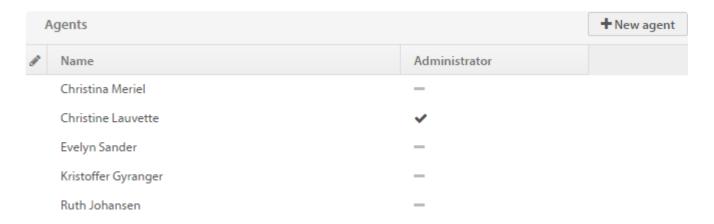
# Security

In the Security section, you can manage **Agents** and **Departments & Teams**. An agent is a member of a team, and a team is a part of a department.

If Pureservice is installed on-premise, you will also have access to the **Authentication** option.

# Agents

Access the list of all the agents in the helpdesk, by clicking on Agents in the Security section. Unlike end users, agents are members of teams and have different permissions in Pureservice based on which teams/departments they are member of.

| Agents | | **+** New agent |
|---|---|---|
| ✏️  Name | Administrator | |
| Christina Meriel | — | |
| Christine Lauvette | ✔ | |
| Evelyn Sander | — | |
| Kristoffer Gyranger | — | |
| Ruth Johansen | — | |
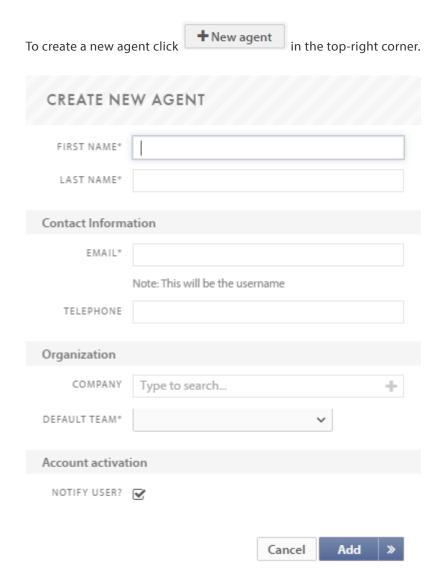
The list of agents shows all enabled **agents** and **administrators**. Disabled agents and administrators can be found in the Contacts section in the Agent Console.

# Create a new agent

Agents can be created in one of two ways:
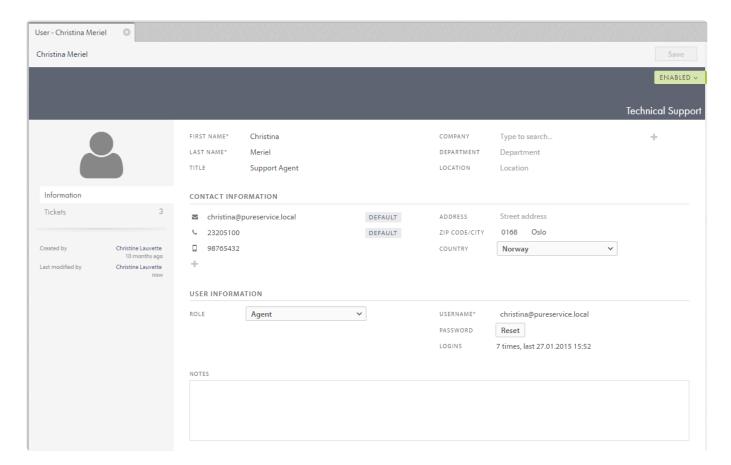
1. Set the role of an existing user to agent, and add team(s) in the user's profile page
2. Create a new agent

To create a new agent click **+ New agent** in the top-right corner.

CREATE NEW AGENT

FIRST NAME*

LAST NAME*

Contact Information

EMAIL*

Note: This will be the username

TELEPHONE

Organization

COMPANY    Type to search...

DEFAULT TEAM*

Account activation

NOTIFY USER?

Cancel    Add »

**Given Name**, **Surname**, **Email** and **Default Team** are required fields. The email address has to be unique and is used as username for the agent. You can add multiple email addresses, phone numbers and teams when editing the agent after creation. It is also possible to change the default team.
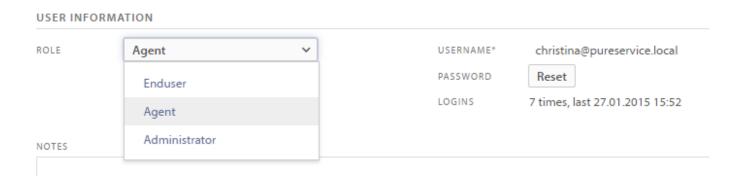
# Edit agent

Double click on an agent or administrator to open the corresponding [User profile page](#).
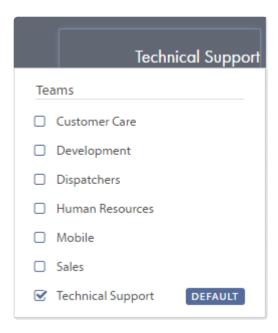


## Roles

As mentioned in the User Guide, the **User Information** section, except for the "Reset" button, is for administrators only. You can edit a user's (both end user, agent and administrator) role.



## Team membership
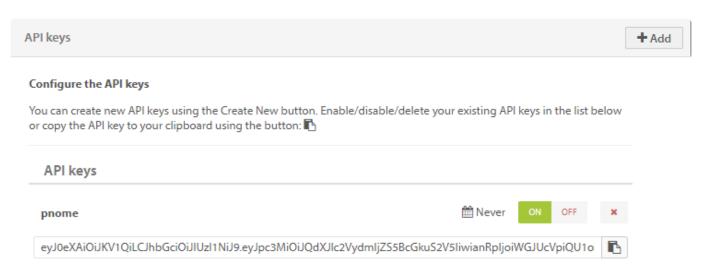
If a user is an agent or administrator, you can also edit team memberships. Simply click on the **team membership** menu below the **enabled/disabled** field. An agent/administrator can be member of multiple teams.

Click on the "Default" button to set a default team.
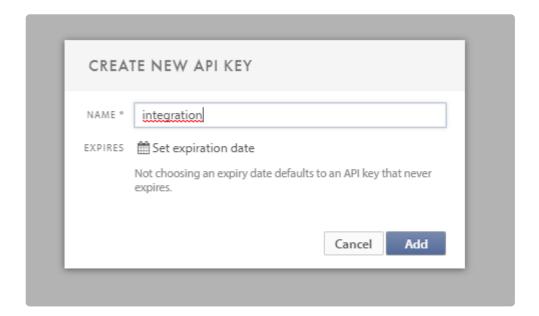
# API Keys

This is where you create and manage your API keys. This is your tokens for authenticating everything you wish to do with the API. You can activate/deactivate keys as you wish.

## Create a new API key

To create a new key you can click **Add** in the top right corner. You have to name your new key and you can chose if you want to set an expiration date or not.

*Disclaimer: The API is in beta which means we support it "as it is" and you may use it at your own risk. We maintain the rights to change and update the API as we deem necessary. We recommend not using the API unless you know how REST APIs work, you know what are doing and preferably have a couple of years of experience with developing.*

# Authentication

## Agent authentication & Enduser authentication

✱ The setup required outside of Pureservice for SSO is recommended to be done by someone with relevant knowledge to avoid misconfiguration. Pureservice Support may be able to assist, but this part of the setup is your own responsibility.

- You can choose to enable other forms of authentication for your agents (Agent console) and endusers (Selfservice) than the ordinary username & password here.
- The protocols supported are **Windows Authentication** (OnPrem only), **WS Federation**, SAML-P and **Oauth 2**. See the relevant sub-sites for detailed setup information.
- All types of setup includes an option for "Bypass SSO". This allows users to choose between logging in with their Pureservice login details or the SSO function. If this is *not* enabled, users will simply be sent to the SSO login immediately.
- While all protocols are currently supported by Pureservice we strongly recommend using Oauth 2 because it is newer, more secure and easier to set up and maintain.

**Before configuring** the chosen authentication protocol in Pureservice, make sure your infrastructure (Azure or ADFS) is ready first.
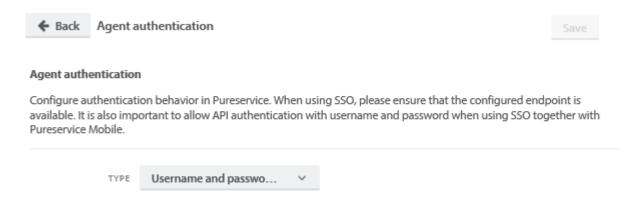
✱ If you currently use Windows Authentication for Enduser authentication and want to switch authentication method, then Pureservice Support needs to disable this first.

It is important to Bypass SSO under **API authentication** and allow API authentication using username and password when using SSO together with the Puremobile app.

# Username and password

## Configure Pureservice authentication with Username and password

← Back   Agent authentication                                                  Save

**Agent authentication**

Configure authentication behavior in Pureservice. When using SSO, please ensure that the configured endpoint is available. It is also important to allow API authentication with username and password when using SSO together with Pureservice Mobile.

TYPE   Username and passwo...   ⌄
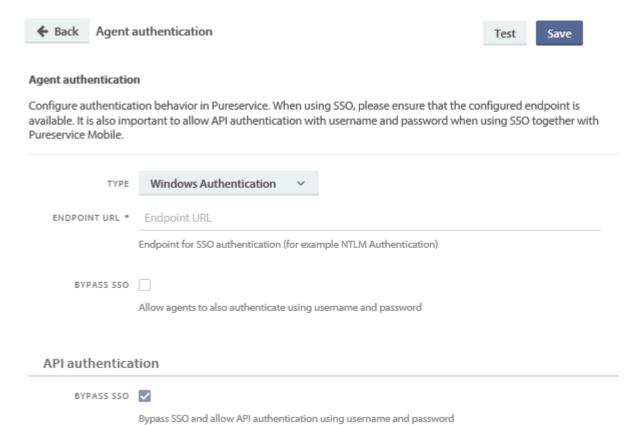
This is the default setting. Each user has to set a password in Pureservice to be able to log in.

# Windows Authentication

## Configure Pureservice authentication with Windows Authentication

← Back   Agent authentication                    Test   **Save**

**Agent authentication**

Configure authentication behavior in Pureservice. When using SSO, please ensure that the configured endpoint is available. It is also important to allow API authentication with username and password when using SSO together with Pureservice Mobile.

TYPE        Windows Authentication     ⌄

ENDPOINT URL *    Endpoint URL

Endpoint for SSO authentication (for example NTLM Authentication)

BYPASS SSO    ☐

Allow agents to also authenticate using username and password

**API authentication**

BYPASS SSO    ☑

Bypass SSO and allow API authentication using username and password

✱  It is important to allow API authentication with username and password when using SSO together with the Pureservice app..

# OAuth 2

## Configure Pureservice authentication with OAuth 2
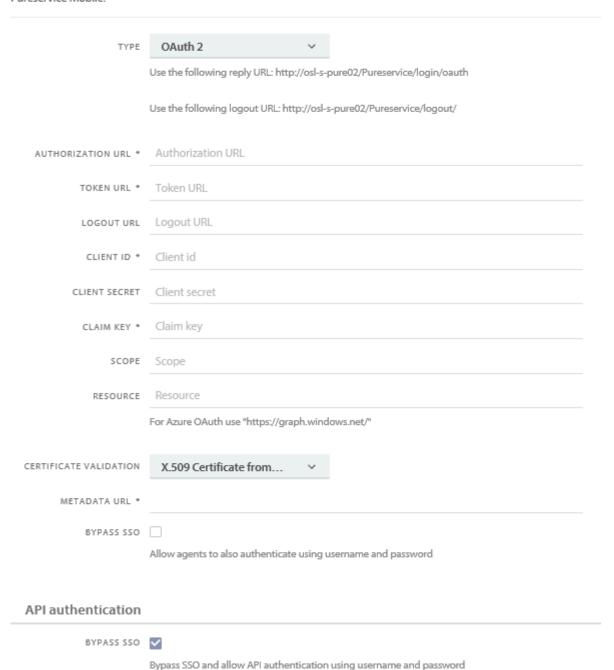
✳ The setup required outside of Pureservice is recommended to be done by someone with relevant knowledge to avoid misconfiguration. Pureservice Support may be able to assist, but this part of the setup is your own responsibility.

← Back    **Agent authentication**                                                   Save

**Agent authentication**

Configure authentication behavior in Pureservice. When using SSO, please ensure that the configured endpoint is available. It is also important to allow API authentication with username and password when using SSO together with Pureservice Mobile.

| | |
|---|---|
| TYPE | OAuth 2 ∨ |

Use the following reply URL: http://osl-s-pure02/Pureservice/login/oauth

Use the following logout URL: http://osl-s-pure02/Pureservice/logout/

| | |
|---|---|
| AUTHORIZATION URL * | Authorization URL |
| TOKEN URL * | Token URL |
| LOGOUT URL | Logout URL |
| CLIENT ID * | Client id |
| CLIENT SECRET | Client secret |
| CLAIM KEY * | Claim key |
| SCOPE | Scope |
| RESOURCE | Resource |

For Azure OAuth use "https://graph.windows.net/"

| | |
|---|---|
| CERTIFICATE VALIDATION | X.509 Certificate from… ∨ |
| METADATA URL * | |
| BYPASS SSO | ☐ |

Allow agents to also authenticate using username and password

**API authentication**

| | |
|---|---|
| BYPASS SSO | ☑ |

Bypass SSO and allow API authentication using username and password

**Configuring ADFS**

1.  Add OAuth 2 client
    a. Open Powershell on the ADFS server
    b. Run the following command: Add-AdfsClient -RedirectUri
       "https://YOUR-PURESERVICE-URL/login/oauth" -ClientId "*A-KEY-OF-YOUR-CHOICE*" -Name
       "Pureservice OAuth2"
       (You can easily generate a random key here: https://www.guidgenerator.com/online-guid-

[generator.aspx](generator.aspx)

**Configuring Azure**

1. Log in to Azure, navigate to "Azure Active Directory" and "App Registrations".
2. To create a new Application, select "New registration".
   a. Give it a relevant name
   b. Enter the reply URL for your Pureservice as the Redirect URI, this can be found in **Pureservice Administrator settings** -> Security -> Authentication -> Either Agent or End user authentication -> Set type to OAuth 2 and copy the URL after **Use the following reply URL:**.
   c. Click "Register"
3. Go to "Certificates & secrets" and create a new "Client secret". The key will be shown only once after saving, so make sure you **copy it to the clipboard and save it for later** in the setup!

> ✳ When setting up both Agent and End user authentication for your Pureservice, then the other Redirect URI need to be added after the creation of the app. This is found in the "Authentication" settings for the app.

**Configuring Pureservice**

1. Go to the Pureservice Agent Console and open the Administrator, go to Security -> Authentication and select the relevant site (Agent authentication for the Agent Console and Enduser authentication for Selfservice)
2. Set the Type to "OAuth 2"
3. Set the Authorization URL. This can be found in Azure under "Endpoints" as the "OAuth 2.0 authorization endpoint (v1)"-value.
4. Set the Token URL. This can be found in Azure under "Endpoints" as the "Oauth 2.0 token endpoint (v1)"-value.
5. Optional: Set the Logout URL. Use the same value as in the previous step, but replace "token" at the end with "logout".
6. Set the Client ID to the same as "Application (client) ID" this can be found in the Application's settings/properties (Overview) site in Azure below the Display name.
7. Set the Client secret to the same key that was generated earlier (Step 3 of "Configuring Azure" or step 1b of "Configuring ADFS").
8. Set the Claim key to the URI corresponding to the AD attribute you use as usernames in Pureservice
   a. Copy XML link for "Federation metadata document" and open this in a browser. This can be found in Azure under "Endpoints".
   b. Find the XML node "ClaimTypesOffered" and copy the URI value of the relevant attribute.
      i. If the users' usernames in Pureservice is their userPrincipalName attribute in AD, then the following "ClaimType" can be used: http://schemas.xmlsoap.org/ws/2005/05/identity/claims/upn
9. Leave the Scope and Resource fields in Pureservice blank for Azure.
10. Leave the Certificate validation as "X.509 Certificate from metadata URL" and enter the Metadata URL that is mentioned in step 8a.
11. Optional: Enable Bypass SSO. This will allow users to log in "manually" with their Pureservice usernames and passwords while also having the option of using the OAuth 2 Single SignOn.

# SAML-P

## Configure Pureservice authentication with ꜱᴀᴍʟ-P

> ✱ The setup required outside of Pureservice is recommended to be done by someone with relevant knowledge to avoid misconfiguration. Pureservice Support may be able to assist, but this part of the setup is your own responsibility.

← Back   Agent authentication                                    Save

**Agent authentication**

Configure authentication behavior in Pureservice. When using SSO, please ensure that the configured endpoint is available. It is also important to allow API authentication with username and password when using SSO together with Pureservice Mobile.

TYPE   SAML-P ⌄

Use the following reply URL: http://osl-s-pure02/Pureservice/login/samlp

Use the following logout URL: http://osl-s-pure02/Pureservice/logout/

Download the SAML-P SP metadata document here

ENDPOINT URL *

ENDPOINT URL (LOG OUT)

CLAIM KEY *

CERTIFICATE VALIDATION   X.509 Certificate from... ⌄

METADATA URL *

BYPASS SSO ☐

Allow agents to also authenticate using username and password

**API authentication**

BYPASS SSO ☑

Bypass SSO and allow API authentication using username and password

**Configuring ᴀᴅꜰꜱ**

1. Add Rule
    a. Send ʟᴅᴀᴘ Properties as Claims
    b. Next
    c. Set a name

    d. Choose attribute store "Active Directory"

    e. Set up Mapping as wanted (example: E-mail Address or/and User-Principal-Name — this will depend on what usernames you use in Pureservice)

    f. Finish

2. Add Rule

    a. Transform an incoming claim

    b. Next

    c. Set a name

    d. Set Incoming claim type, outgoing claim type and outgoing name ID format

        i. Incoming claim type: Choose the relevant value you chose for mapping in step 1e

        ii. Outgoing claim type: Enter or select "Name ID"

        iii. Outgoing name ID format: Choose "Transient Identifier"

    e. Leave the rest as it is, click OK and then Finish

With the setup above, you can either select *http://schemas.xmlsoap.org/ws/2005/05/identity/claims/upn* or *http://schemas.xmlsoap.org/ws/2005/05/identity/claims/emailaddress* as the Claim key in Pureservice.

**Configuring Pureservice (ADFS)**

1. Go to the Pureservice Agent Console and open the Administrator module, go to Security -> Authentication and select the relevant site (Agent authentication for the Agent Console and Enduser authentication for Selfservice)

2. Choose Type: SAML-P

3. Endpoint URL: Enter the ADFS endpoint URL. Remove any references to "Pureservice" in the URL and add "ADFS"

    a. Example: *https://adfs.yourdomain.com/adfs/ls/*

4. Claim key: Enter the relevant Claim key URI as mentioned last in the "Configuring ADFS"-section above

    a. Example: *http://schemas.xmlsoap.org/ws/2005/05/identity/claims/emailaddress* or *http://schemas.xmlsoap.org/ws/2005/05/identity/claims/upn*

5. Leave the Certificate validation as "X.509 Certificate from metadata URL" or change it to "X.509 Certificate"

    a. "X.509 Certificate from metadata URL": *https://YourPureserviceServer/FederationMetadata/2007-06/FederationMetadata.xml*

    b. "X.509 Certificate": Find and use the SignatureValue from the metadata document that can be found at *https://FEDERATIONSERVER/FederationMetadata/2007-06/FederationMetadata.xml*

6. Optional: Enable Bypass SSO. This will allow users to log in "manually" with their Pureservice usernames and passwords while also having the option of using the SAML-P Single SignOn.

**Configuring Pureservice (Feide)**

1. Go to the Pureservice Agent Console and open the Administrator module, go to Security -> Authentication and select the relevant site (Agent authentication for the Agent Console and Enduser authentication for Selfservice)

2. Choose Type: SAML-P

3. Endpoint URL: *https://idp.feide.no/simplesaml/saml2/idp/SSOService.php*

4. Endpoint URL (Log out): *https://idp.feide.no/simplesaml/saml2/idp/SingleLogoutService.php*

5. Claim key: Enter the Claim key from Feide
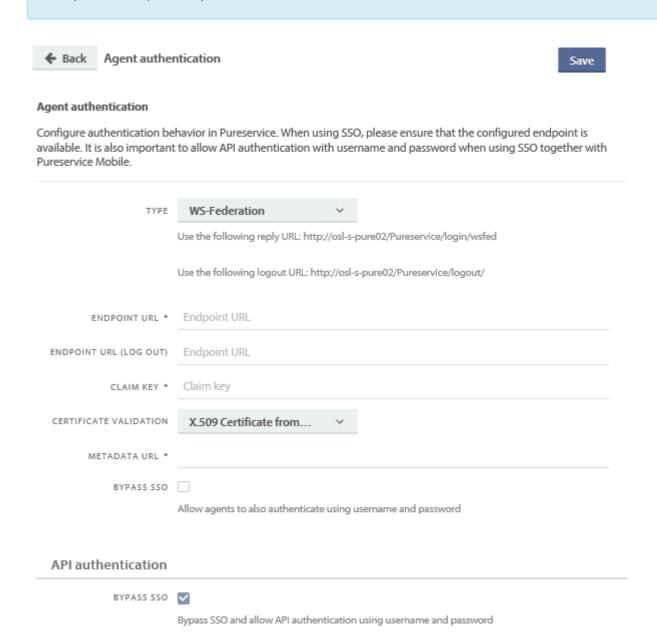
    a.  Example: "eduPersonPrincipalName"

6. Certificate validation: Leave as "X.509 Certificate from metadata URL" and enter the URL *https://idp.feide.no/simplesaml/saml2/idp/metadata.php*

7. Optional: Enable Bypass SSO. This will allow users to log in "manually" with their Pureservice usernames and passwords while also having the option of using the SAML-P Single SignOn.

8. Save the setup

9. Click the link at the end of "Download the SAML-P SP metadata document here". **Important:** This must be sent to Feide before the finished setup will work.

# WS-Federation

## Configure Pureservice authentication with WS Federation

❋ The setup required outside of Pureservice is recommended to be done by someone with relevant knowledge to avoid misconfiguration. Pureservice Support may be able to assist, but this part of the setup is your own responsibility.

← Back    Agent authentication                                          Save

**Agent authentication**

Configure authentication behavior in Pureservice. When using SSO, please ensure that the configured endpoint is available. It is also important to allow API authentication with username and password when using SSO together with Pureservice Mobile.

TYPE    WS-Federation ⌄

Use the following reply URL: http://osl-s-pure02/Pureservice/login/wsfed

Use the following logout URL: http://osl-s-pure02/Pureservice/logout/

ENDPOINT URL *    Endpoint URL

ENDPOINT URL (LOG OUT)    Endpoint URL

CLAIM KEY *    Claim key

CERTIFICATE VALIDATION    X.509 Certificate from… ⌄

METADATA URL *

BYPASS SSO    ☐
Allow agents to also authenticate using username and password

**API authentication**

BYPASS SSO    ☑
Bypass SSO and allow API authentication using username and password

**Configuring ADFS**

1. Open the AD FS Management console, expand "Trust Relationships" and select "Relying Party Trusts"
2. In the actions list, select "Add Relying Party Trust.."
3. Click start on the Welcome screen
4. Select Data Source: "Enter data about the relying party manually" and click Next
5. Specify Display Name: Can be anything, for example "Pureservice Trust", then click Next

6. Choose Profile: Select "AD FS Profile" and click Next
7. Configure Certificate: Do not configure and click Next
8. Configure URL: Select "Enable support for the WS-Federation Passive protocol", enter the address for the WS-Federation endpoint (see examples below) and click Next
   a. Important! Must use HTTPS!
   b. Examples: *https://YOUR-PURESERVICE-URL/login/wsfed/* / *https://YOUR-PURESERVICE-URL/agent/login/wsfed/*
9. Configure Identifiers: Set the Pureservice site URL (example: *https://YOUR-PURESERVICE-URL/agent/*) and click Next
10. Configure Multi-factor Authentication Now?: Select "I do not want to.." and click Next
11. Choose Issuance Authorization Rules: Select "Permit all users to access the relying party" and click Next
12. Ready to Add Trust: Click Next
13. Finish: Choose "Open the Edit Claim Rules dialog.."

For ADFS to send the needed information to Pureservice, a "Claim Rule" must be set up that defines which attributes from Active Directory is mapped to the outgoing claims.

1. Issue Transform Rules, right-click and select "Edit Claim Insurance Policy.."
2. Select "Add Rule.."
3. Choose Rule Type: Select "Send LDAP Attributes as Claims" (is selected by default) and click Next
4. Configure Claim Rule
   a. Set a name, for example "Pureservice email/username from LDAP"
   b. Select Attribute Store "Active Directory"
   c. Set up Mapping
      i. This depends on what you want and your usernames in Pureservice
      ii. Example: LDAP Attribute "SAM-Account-Name" -> Outgoing Claim Type "Windows account name" and/or LDAP Attribute "User-Principal-Name" -> Outgoing Claim Type "UPN"

Pureservice must be configured with an endpoint URL, Certificate information and which Claim key should be checked against the username.
Following is where this information can be found in ADFS. You will need this for later steps in the setup.

1. Endpoint URL
   a. Open the AD FS Management console and expand "Service" -> "Endpoints" node
   b. Find the row with type "SAML-2.0/WS-Federation" and find the URL Path value
2. Certificate #1
   a. Option 1: "X.509 Certificate from metadata URL" (in Pureservice): *https://FEDERATIONSERVER/FederationMetadata/2007-06/FederationMetadata.xml*
   b. Option 2: "X.509 Certificate" (in Pureservice): Open the XML document mentioned above (step 2a) and find the SignatureValue
3. Certificate #2
   a. Open the AD FS Management console and expand "Service" -> "Certificates" node
   b. Find the "Token-signing" certificate and select "View Certificate.." in the Actions menu
   c. Choose "Details" in the certificate dialogue and find the values "Issuer" and "Thumbprint"
4. Claim key
   a. Open the AD FS Management console and expand "Service" -> "Claim Descriptions" node

b. Find the row that corresponds with the users' usernames and find the Claim Type value
   i. The standard is *http://schemas.xmlsoap.org/ws/2005/05/identity/claims/emailaddress* when email addresses are used as the usernames and *http://schemas.xmlsoap.org/ws/2005/05/identity/claims/upn* when UPNs are used as the usernames
   ii. **Important!** Must correspond with the Claim Rule that was created in steps 1-4 for "Issue Transform Rules" in the previous section.

**Configuring Pureservice**

1. Go to the Pureservice Agent Console and open the Administrator module, go to Security -> Authentication and select the relevant site (Agent authentication for the Agent Console and Enduser authentication for Selfservice)
2. Choose Type: WS-Federation
3. Endpoint URL: Enter the ADFS endpoint URL (step 1 in the previous section)
4. Optional: Endpoint URL (Log out): Enter the URL if you want users to also be logged out of ADFS if using the log out function in Pureservice
5. Claim key: Enter the relevant Claim key (step 4 in the previous section)
6. Certificate validation: Select "Issuer name and thumbprint", add the Issuer and Thumbprint in their separate fields (step 3 in the previous section)
7. Optional: Enable Bypass SSO. This will allow users to log in "manually" with their Pureservice usernames and passwords while also having the option of using the WS-Federation Single SignOn.
8. Save

# OpenID Connect

## Configure Pureservice authentication with OpenID Connect

✳ The setup required outside of Pureservice is recommended to be done by someone with relevant knowledge to avoid misconfiguration. Pureservice Support may be able to assist, but this part of the setup is your own responsibility.

← Back    Agent authentication                                              **Save**

### Agent authentication

Configure authentication behavior in Pureservice. When using SSO, please ensure that the configured endpoint is available. It is also important to allow API authentication with username and password when using SSO together with Pureservice Mobile.

TYPE    **OpenID Connect** ⌄

Use the following reply URL: https://osl-s-pure02.syscomworld.com/login/openidconnect

Use the following logout URL: https://osl-s-pure02.syscomworld.com/logout/

CONFIGURATION TYPE    **Automatic discovery** ⌄

SERVER URL *    Server URL

CLIENT ID *    Client id

CLIENT SECRET    Client secret

CLAIM KEY *    Claim key

SCOPE    Scope

RESOURCE    Resource

BYPASS SSO    ☐

Allow agents to also authenticate using username and password

### API authentication

BYPASS SSO    ☑

Bypass SSO and allow API authentication using username and password

**Configuring Azure**

1. Log in to Azure, navigate to "Azure Active Directory" and "App Registrations".
2. To create a new Application, select "New registration".
   a. Give it a relevant name
   b. Enter the reply URL for your Pureservice as the Redirect URI, this can be found in **Pureservice Administrator settings** -> Security -> Authentication -> Either Agent or End user authentication -> Set type to OpenID Connect and copy the URL after **Use the following reply URL:**.
   c. Click "Register"
3. Go to "Certificates & secrets" and create a new "Client secret". The key will be shown only once after saving, so make sure you **copy it to the clipboard and save it for later** in the setup!

> ✱ When setting up both Agent and End user authentication for your Pureservice, then the other Redirect URI need to be added after the creation of the app. This is found in the "Authentication" settings for the app.

**Configuring Pureservice**

1. Go to the Pureservice Agent Console and open the Administrator, go to Security -> Authentication and select the relevant site (Agent authentication for the Agent Console and Enduser authentication for Selfservice)
2. Set the Type to "OpenID Connect"
3. Set the Configuration Type to "Automatic discovery"
4. Set the Server URL. This is "https://login.microsoftonline.com/Directory (tenant) ID/v2.0"
   a. The "Directory (tenant) ID" can be found in the Application's settings/properties (Overview) site in Azure
   b. Example URL: https://login.microsoftonline.com/a1111111-b222-c333-e444-f55555555555/ v2.0/
5. Set the Client ID to the same as "Application (client) ID" this can be found in the Application's settings/properties (Overview) site in Azure
6. Set the Client secret to the same key that was generated earlier
7. Set the Claim key you want
   a. Example can the following Claim key be used for mail in Pureservice:
      email
   b. Example can the following Claim key be used for username in Pureservice:
      preferred_username
8. Set the Scope wanted. This may vary depending on setup.
   a. Example this works for Azure:
      openid profile email
9. Leave the Resource field blank
10. Optional: Enable Bypass SSO. This will allow users to log in "manually" with their Pureservice usernames and passwords while also having the option of using the OpenID Connect Single SignOn.

# Departments & Teams

| Name | Language | Locale | Members |
|------|----------|--------|---------|
| **Dispatch** | | | |
| Dispatchers | English | NO | 3 |
| **Human Resources** | | | |
| Human Resources | English | NO | 1 |
| **Sales** | | | |
| Sales | English | NO | 0 |
| **Support** | | | |
| Customer Care | English | NO | 1 |
| Development | English | NO | 1 |
| Mobile | English | NO | 0 |
| Technical Support | English | NO | 3 |

## Departments

Departments are used to separate different teams and their configurations, such as categories. It is common that these departments are mapped to the different divisions in the organisation. Departments can also be based on e.g. different products, locations or area of expertise.

Each department will have its own set of permissions to and from other departments, categories and email configuration, which enables you to manage support tickets individually for each department.

## Teams

Teams are used to separate agents and administrators into teams under departments that offer support. They are often defined by e.g. products, locations or area of expertise. As illustrated in the picture above, each team holds information about chosen **language** and **local**, and the number of team **members**.
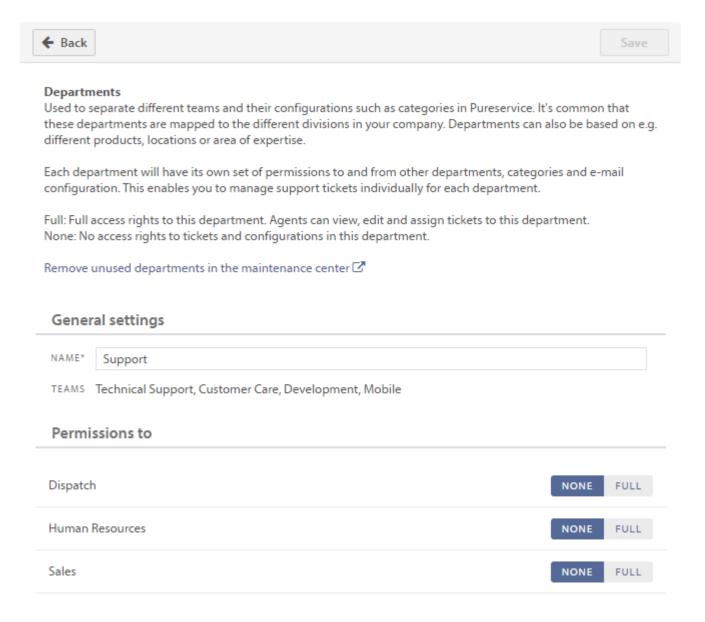
You can set default team for an agent in the User profile page. When a ticket is created and assigned to an agent, the ticket is also assigned to his/her default team.

# Create a new department

Click   ![New department]   in the top-right corner to start the process of creating a new department.

CREATE NEW DEPARTMENT

NAME*

Cancel   Add   »

To create a new department, simply enter a *unique* name in the text field and click   Add   . Click   »   if you want to create and open the department immediately. To close the window and discard input in the text field, press   Cancel  .

# Edit department

Double click on the department you want to edit. You can edit the department's name and its permissions to other departments. In addition, there is a shortcut to the **maintenance center**, where you can remove unused departments.



## General settings

To edit the department's name, in this case "Support", simply enter a new name in the text field and press the enter/return key.

## Permissions to

When editing a department, it is possible to set permission rights to other departments registered in the help desk. By default, permissions to other departments are set to **None**. A department can either have **None** or **Full** access to another department. To clarify how permissions work, we will use the Support department as an example.

# None

As illustrated in the picture above, Support does not have permission to the Sales department, as the permission right is set to **None**. This means that Support's team members are unable to view and edit tickets assigned to teams or agents in the Sales department. Support's team members are also unable to view and select agents, teams and categories defined for the Sales department. However, if a team member from Support is member of another department's team(s) with **Full** permissions, this does not apply.
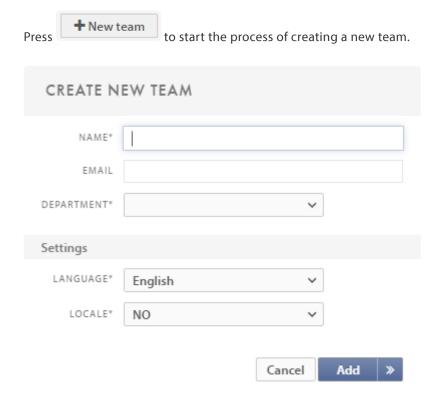
# Full

To give Support **Full** permission to Sales, press [ FULL ] followed by the "Save" button.



Giving Support **Full** access to Sales enables team members in Support to view, edit and reassign tickets that are assigned to a team or an agent in the Sales department. Support's team members can also view and select agents, teams and categories defined for the Sales department. This does **not** mean that the Sales department has access to the Support department. The communication only goes one way. To enable a two-way communication, you have to edit the Sales department's access rights as well.

# Create a new team

Press **+ New team** to start the process of creating a new team.
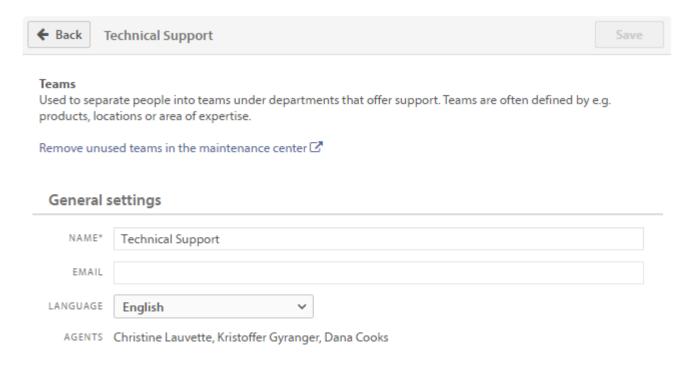
In order to create a new team, you have to enter a *unique* team **name** and choose **department**, **language** and **locale**. It is optional to enter a team email address. Setting which department the team is a part of, gives the team permission rights and configurations, such as categories. Pureservice will be displayed with the chosen language for agents who join the team and set it as their default team. The **locale** you choose will dictate the time zone, date format, number format and currency sign.

> ✳ It is only possible to enter *one* email address per team.

# Edit team

Double click on the team you want to edit in the Departments & Teams list.



You can rename a team, and change the email and language. For your convenience, all team members are listed. In addition, there is a shortcut to the **maintenance center**, where you can remove unused teams.

# Login attempts

Here you can see all login attempts for Pureservice and Selfservice. Failed login attempts will be highlighted in red while successful ones will be highlighted in green.

**Login attempts**

**Login attempts in Pureservice and Selfservice**

Here you can see all login attempts for Pureservice and Selfservice. Failed login attempts will be highlighted in red while successful ones will be highlighted in green.

| Username | Time | Authentication type | Role | Result |
|---|---|---|---|---|
| | an hour ago | Username and pass… | Enduser | ✖ |
| | 10 hours ago | OAuth 2 | Agent | ✔ |
| | 10 hours ago | Username and pass… | Agent | ✖ |
| | 10 hours ago | Username and pass… | Agent | ✖ |
| | 10 hours ago | Username and pass… | Agent | ✖ |
| | 16 hours ago | Username and pass… | Agent | ✔ |
| | 16 hours ago | Username and pass… | Enduser | ✔ |
| | 19 hours ago | Username and pass… | Agent | ✔ |
| | 21 hours ago | Username and pass… | Agent | ✖ |
| | a day ago | OAuth 2 | Agent | ✔ |
| | a day ago | Username and pass… | Enduser | ✔ |
| | a day ago | Username and pass… | Enduser | ✔ |
| | a day ago | OAuth 2 | Agent | ✔ |
| | a day ago | Username and pass… | Agent | ✖ |
| | a day ago | Username and pass… | Agent | ✖ |
| | a day ago | OAuth 2 | Agent | ✔ |
| | a day ago | OAuth 2 | Agent | ✔ |

# Selfservice

In the Administrator console, you can configure Selfservice settings, create categories and add forms.
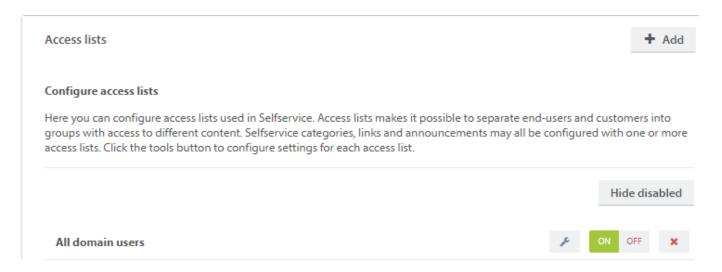
# Access lists

Access lists is where you create lists based on user details, companies, and/or locations of which you want to approve or deny access to specific resources (links, announcements and categories) on your Selfservice. This is useful for example in case you need to give one group of users access to a certain set of categories with forms, and deny everyone else access to them. Another example is limiting announcements to your domain users. Your customers doesn't necessarily need to know that your printer is malfunctioning or that the coffee machine is under repair.

## Create an Access List
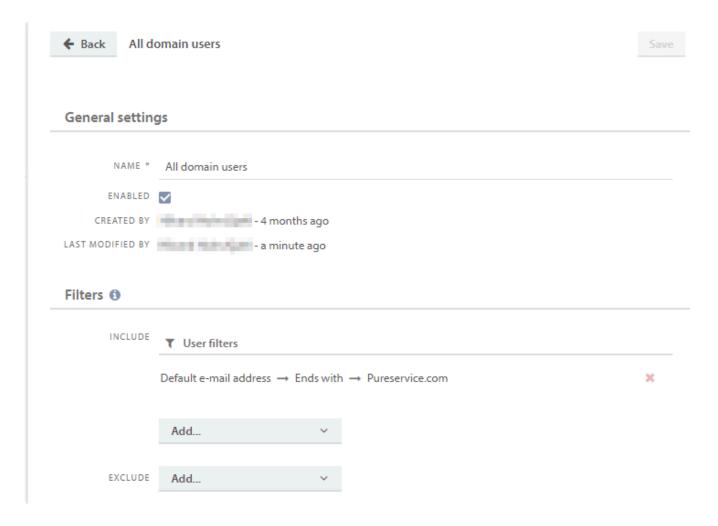
Click **+Add** to create a new Access List. Give the list a name and define its conditions.
After the list is created you can chose to enable/disable the list or to configure it further.



## Edit an Access List
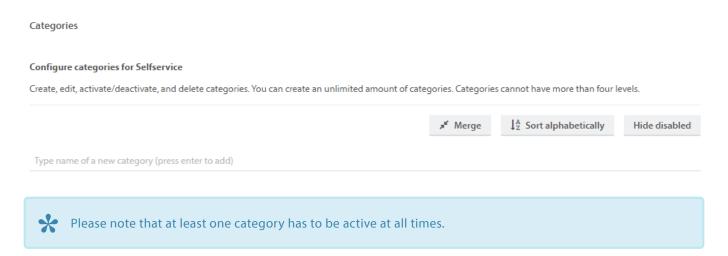
Click the edit button on the list you want to configure. The list below is set up to include all users with email addresses ending with @pureservice.com, effectively including all domain users from the pureservice.com domain

Access lists can be based on **All Users**, individual **Users**, all users within a **Company** and specific users using filters like **Default Email Address**,**Title**, **Country**, **Departmenet**, **Location** and **Is superuser**

# Categories
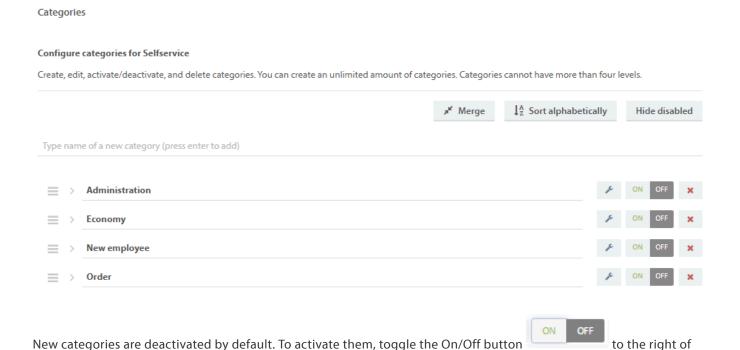
As an administrator, you can configure Selfservice categories. You can create, edit, activate/deactivate and delete categories. In addition, you can merge existing categories, sort categories in alphabetical or desired order by drag & drop and choose to hide/show disabled categories.

**Categories**

**Configure categories for Selfservice**

Create, edit, activate/deactivate, and delete categories. You can create an unlimited amount of categories. Categories cannot have more than four levels.

> ✳ Please note that at least one category has to be active at all times.

## Add a category

It is possible to create an unlimited amount of categories, but each category can only have a total amount of four levels. You can arrange categories so that they appear in Selfservice in a desired order. To add a new category, simply type the category name in the input field and press the return/enter key. To add a subcategory, type the name in the underlying input field of the parent category.

**Categories**

**Configure categories for Selfservice**

Create, edit, activate/deactivate, and delete categories. You can create an unlimited amount of categories. Categories cannot have more than four levels.

- Administration
- Economy
- New employee
- Order

New categories are deactivated by default. To activate them, toggle the On/Off button to the right of the category.
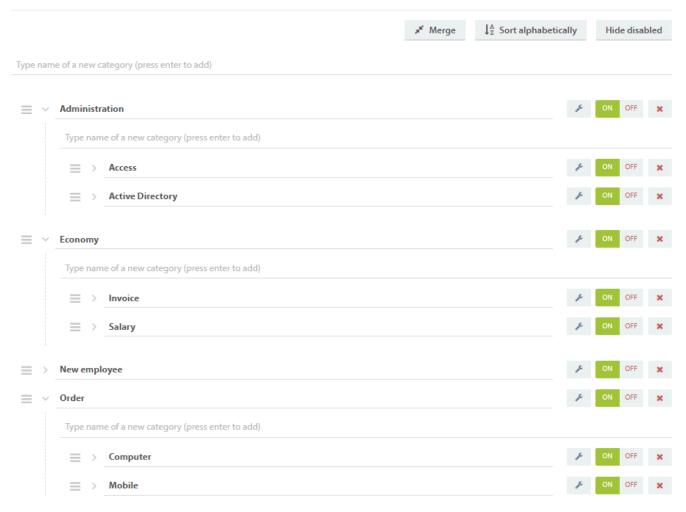
The categories are minimized by default, in order to give a clear overview. Press on the categories to expand them and display subcategories.

Categories

**Configure categories for Selfservice**

Create, edit, activate/deactivate, and delete categories. You can create an unlimited amount of categories. Categories cannot have more than four levels.

| | | Merge | | Sort alphabetically | | Hide disabled |

Type name of a new category (press enter to add)

| ☰ ∨ | **Administration** | | ON | OFF | ✕ |

Type name of a new category (press enter to add)

| ☰ ❯ | **Access** | | ON | OFF | ✕ |
| ☰ ❯ | **Active Directory** | | ON | OFF | ✕ |

| ☰ ∨ | **Economy** | | ON | OFF | ✕ |

Type name of a new category (press enter to add)

| ☰ ❯ | **Invoice** | | ON | OFF | ✕ |
| ☰ ❯ | **Salary** | | ON | OFF | ✕ |

| ☰ ❯ | **New employee** | | ON | OFF | ✕ |

| ☰ ∨ | **Order** | | ON | OFF | ✕ |

Type name of a new category (press enter to add)

| ☰ ❯ | **Computer** | | ON | OFF | ✕ |
| ☰ ❯ | **Mobile** | | ON | OFF | ✕ |

# Edit a category
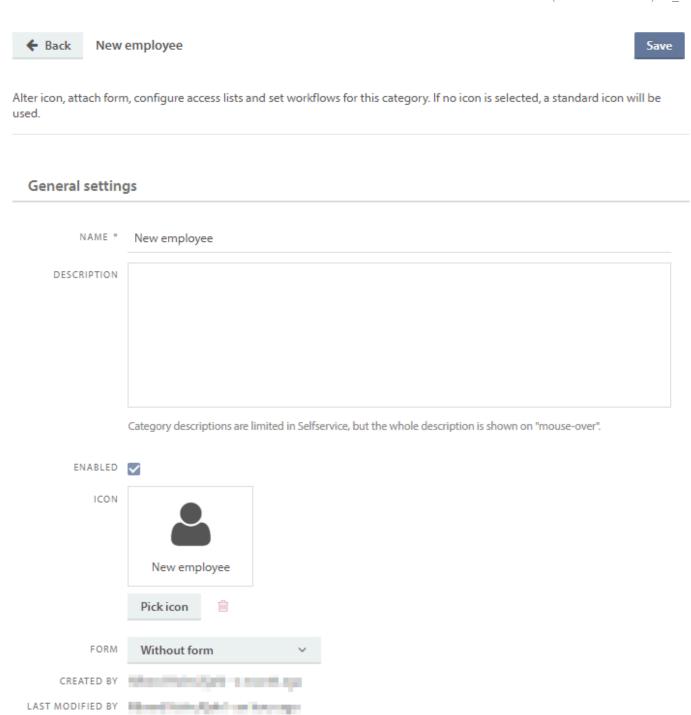
To edit a category, click on the settings icon 🔧 .

## General settings

If a category *has not* been linked to a form, you will only be able to edit the general settings and add or remove one or more access lists. You can rename the category, enable or disable it, choose an icon or link the category to a form.

← Back    New employee        **Save**

Alter icon, attach form, configure access lists and set workflows for this category. If no icon is selected, a standard icon will be used.

## General settings

NAME *    New employee

DESCRIPTION

Category descriptions are limited in Selfservice, but the whole description is shown on "mouse-over".

ENABLED ✓

ICON

New employee

Pick icon 🗑

FORM    Without form ⌄

CREATED BY

LAST MODIFIED BY

## Access lists ⓘ
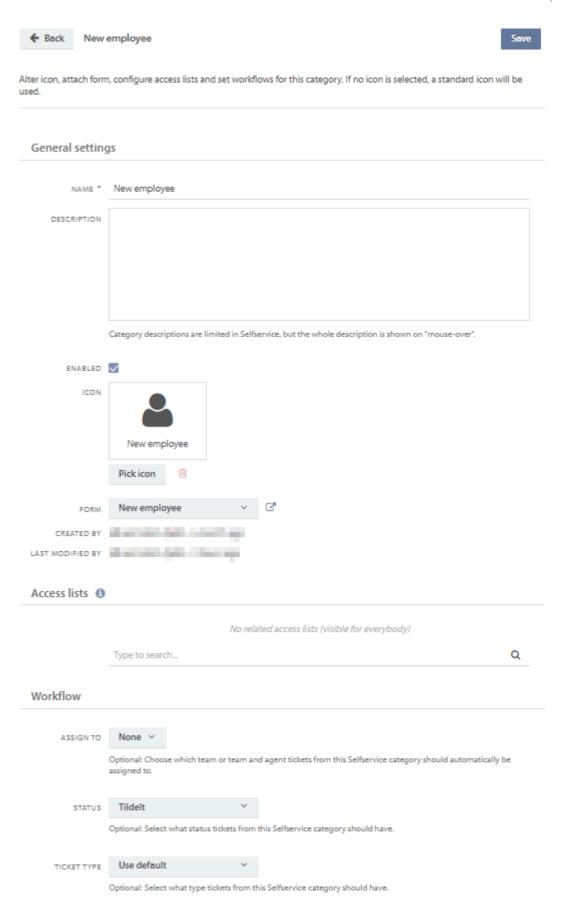
*No related access lists (visible for everybody)*

Type to search...      🔍

If a category *has* been linked to a form, you will also be able to edit the workflow settings.

← Back    New employee                                          **Save**

Alter icon, attach form, configure access lists and set workflows for this category. If no icon is selected, a standard icon will be used.

## General settings

| NAME * | New employee |
|---|---|

DESCRIPTION

Category descriptions are limited in Selfservice, but the whole description is shown on "mouse-over".

ENABLED ☑

ICON

New employee

Pick icon    🗑

FORM    New employee ⌄    ⬀

CREATED BY

LAST MODIFIED BY

## Access lists ⓘ

*No related access lists (visible for everybody)*

Type to search...    🔍

## Workflow

ASSIGN TO    None ⌄

Optional: Choose which team or team and agent tickets from this Selfservice category should automatically be assigned to.

STATUS    Tildelt ⌄

Optional: Select what status tickets from this Selfservice category should have.

TICKET TYPE    Use default ⌄

Optional: Select what type tickets from this Selfservice category should have.

❋  Remember to save changes made to a category.

**Icon**

The category name will be displayed in Selfservice by default. If you would like to display an icon in addition to the name, simply click **Pick icon** and choose a suitable icon. You can scroll or search for icons in the icon picker window.



There are 60 different colours to choose from.
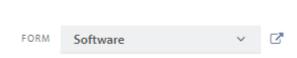


**Form**

A category is *not* linked to a form by default. If you want to link a category, simply choose a form from the drop down menu.
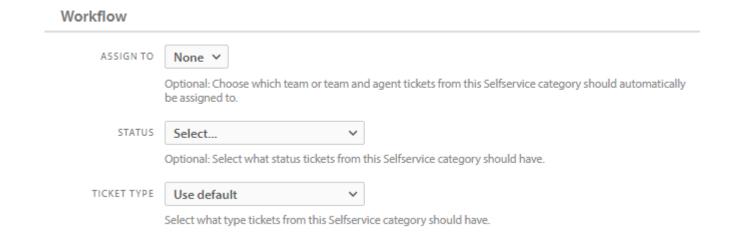
If you have created your own forms, they will be displayed above the **Standard form**.

You will also have access to go directly to the form that has already been created by selecting it and pressing the edit button



## Workflow

If a category is linked to a form, you will also be able to edit the workflow settings, as mentioned earlier.
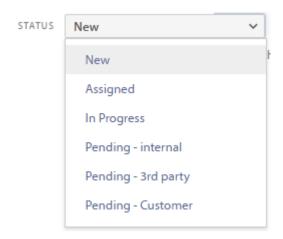


### Assign to

You can choose which team or team and agent tickets from Selfservice should be assigned to.
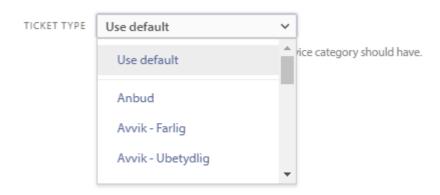
## Status

You can also choose which status tickets from Selfservice should get.



## Ticket type

And you can choose which ticket type tickets from Selfservice should get.



# Delete category

To delete a category, simply press the delete button ![x] . You have to confirm the delete action in order to delete the category, and all subcategories.

## CONFIRM
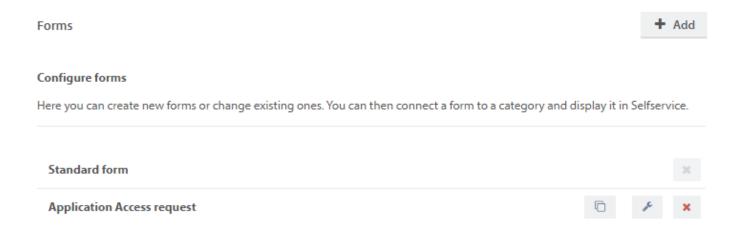
Are you sure you want to delete the category? (and all subcategories)

No    Yes
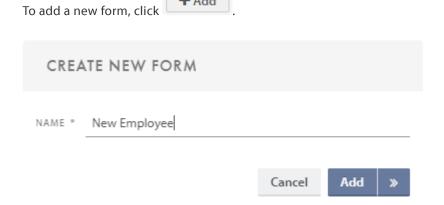
# Forms

All forms are listed in the forms view. Administrators can create new forms or modify existing ones.



There will always be at least one form listed, the **standard form**. You cannot delete this form, as it is the default form. The standard form is used when there are no other forms available in Selfservice.

Self-made forms are listed in alphabetic order below the standard form.

To add a new form, click **+ Add** .
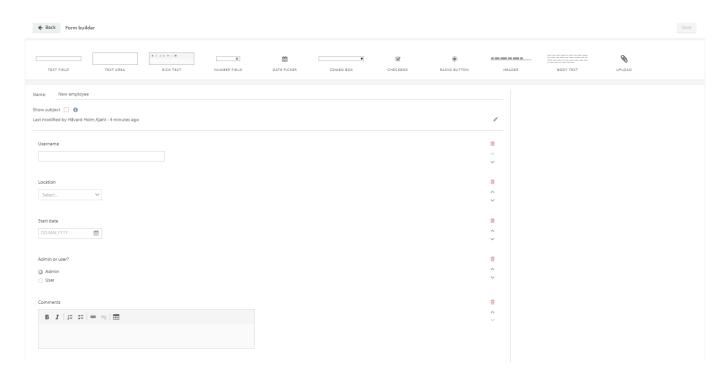


The form name has to be unique. Click **Add** to edit the form later or **Create & open** **»** to start editing the form now.

The **▢** button allows you to copy an existing form. This can then either be used in a different category, or changed to fit a different purpose. This can save time when multiple similar forms needs to be made.

The **🔧** button opens the form bulder for the specified form, and allows you to edit its content.

# The form builder

Below is an example of a "new employee" form.

The form builder is divided into three main areas: **Tool box**, **Form area** & **Sidebar**

## Tool box
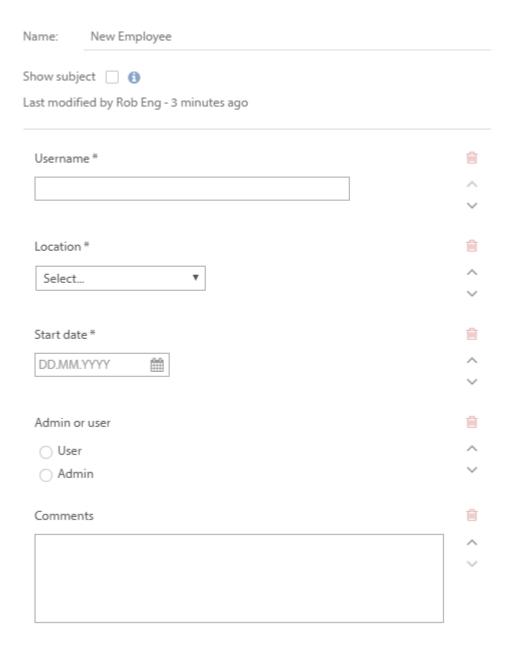
The tool box contains all the elements that you can add to a form. You can either double click on an element or use the drag and drop functionality to add it to the form. If you double click on an element, it will be added at the bottom of the form. Please note that it is not possible to place elements next to each other. An element is either placed above or below another element.



The three elements: Combo box, checkbox and radio button can be made into Conditional forms. This is further explained in the sub topic Conditional forms

## Form area

The form area shows how a form is structured. Click a element to edit it. When clicking a element the sidebar will appear.

Name:       New Employee

Show subject  ☐  ⓘ

Last modified by Rob Eng - 3 minutes ago

---

Username *                                                    🗑

∧

∨

Location *                                                    🗑

Select...                    ▼                                ∧

∨

Start date *                                                 🗑

DD.MM.YYYY          🗓                                        ∧

∨

Admin or user                                                🗑

○ User                                                       ∧

○ Admin                                                      ∨

Comments                                                     🗑

∧

∨

Click **Up** ∧ to move a element in the form area up.
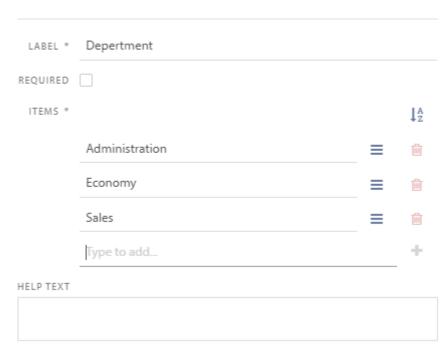
Click **Down** ∨ to move a element in the form area down.
Click **Delete** 🗑 to delete a element in the form area.

## Sidebar

When you mark an element in the form area, its configurable properties are displayed in the sidebar. Below is an example of the configurable properties for a combo box.

## Properties - Combo box

LABEL *    Depertment

REQUIRED   ☐

ITEMS *                                                      ↓A/Z

Administration                                      ≡    🗑

Economy                                             ≡    🗑

Sales                                               ≡    🗑

Type to add...                                              ➕

HELP TEXT
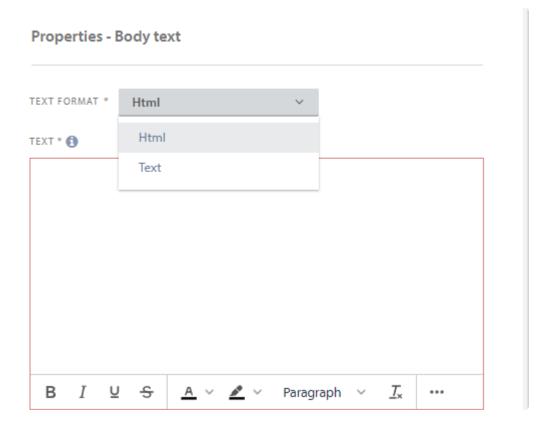
Click **Drag** ≡ to drag and drop elements in the list.
Click **Sort** ↓A/Z to sort elements in the list from A to Z ascending.

The properties in the sidebar will vary depending on which element you have chosen in the form area.

## Html-Text format and how to insert image in a form

By selecting Body text from the toolbox, you have the opportunity to choose between two text formats: Text and HTML

By using HTML format, you have several options to edit the form text as you wish.

## Properties - Body text

TEXT FORMAT *    | Html                    ⌄ |

         Html

         Text

TEXT * ℹ️

**B** *I* U̲ S̶   |   A ⌄   ✏ ⌄   Paragraph ⌄   I̲ₓ   |   •••
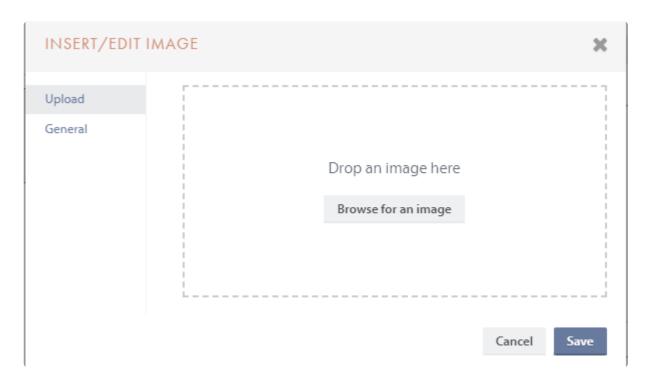
By clicking the more button at the bottom right of the form, you will get a number of options

≡  ⇤  ⇥  ☰   |   —  🔗  ⊞ ⌄  🖼

Here you get the opportunity to align the text to where you want it, create a list, insert/edit a link, create a table and insert/edit a image.

By pressing **insert/edit image**, you can easily drag and drop an image or upload an image that you have saved on your computer.

### INSERT/EDIT IMAGE                                                                ✖

| Upload |
| General |

Drop an image here

Browse for an image

Cancel    **Save**

# Conditional forms
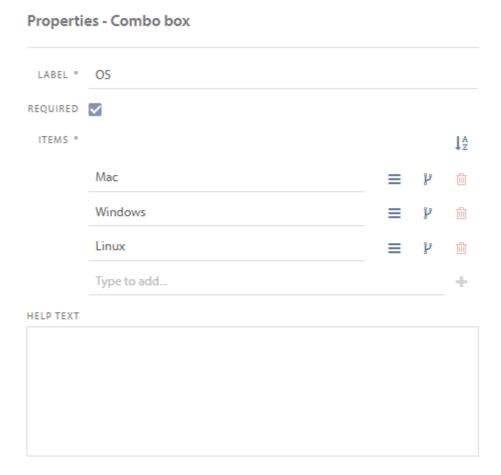
Combo box, checkbox and radio button elements can be made into Conditional forms and have the same functionality and settings available.

## Creating a Conditional form
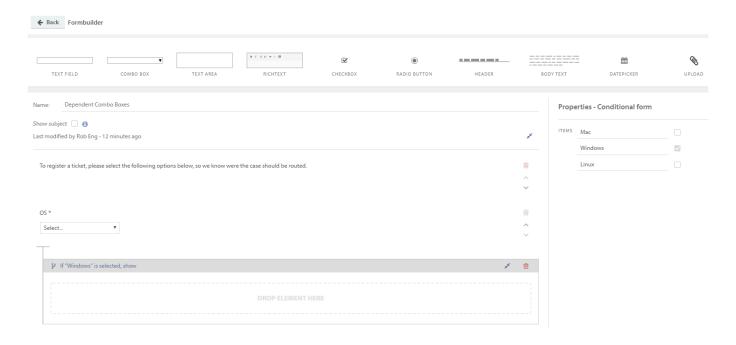
> ✳ We support Conditional forms down to 5 levels. The **fork** icon will be greyed out ⅃ when max levels are reached.

To create a Conditional form you first need to select one of the three supported elements into the form builder and click on it to open properties on the right hand side.



Click **fork** ⅃ on an item in the list to create a Conditional form.
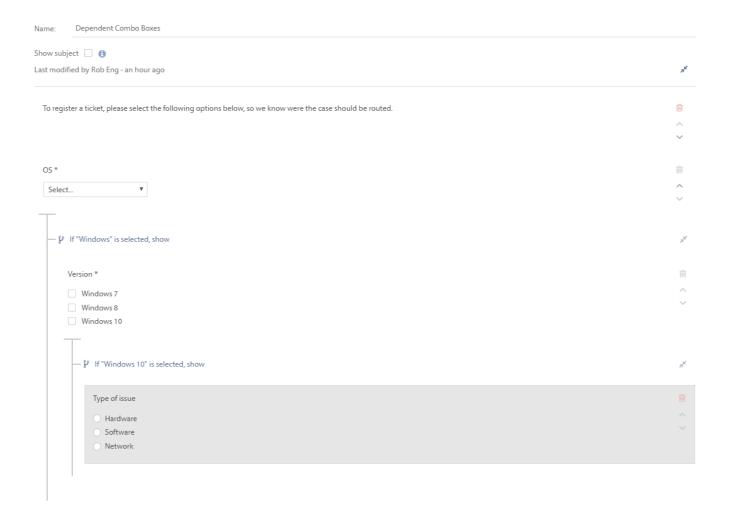
When the form is selected (grey highlight) you can double click an element from the tool box to add it to the form. We recommend this method over drag and drop. Multiple items from the properties on the right hand side can be selected to point to the same Conditional form.

Click **compress** to compress forms.

Click **expand** to expand forms.

Following is an example where combo box, checkbox and radio button elements are used within a three level Conditional form.

Name:  Dependent Combo Boxes

Show subject ☐ ⓘ

Last modified by Rob Eng - an hour ago                                                                                           ⤢

To register a ticket, please select the following options below, so we know were the case should be routed.    🗑
                                                                                                                ︿
                                                                                                                ﹀

OS *                                                                                                            🗑
┌─────────────────────────┬───┐                                                                                 ︿
│ Select...               │ ▼ │                                                                                 ﹀
└─────────────────────────┴───┘

── Ɓ  If "Windows" is selected, show                                                                            ⤢

        Version *                                                                                               🗑
        ☐ Windows 7                                                                                             ︿
        ☐ Windows 8                                                                                             ﹀
        ☐ Windows 10

        ── Ɓ  If "Windows 10" is selected, show                                                                 ⤢

            ┌────────────────────────────────────────────────────────────────────────────┐
            │ Type of issue                                                            🗑  │
            │ ◯ Hardware                                                               ︿  │
            │ ◯ Software                                                               ﹀  │
            │ ◯ Network                                                                    │
            └────────────────────────────────────────────────────────────────────────────┘
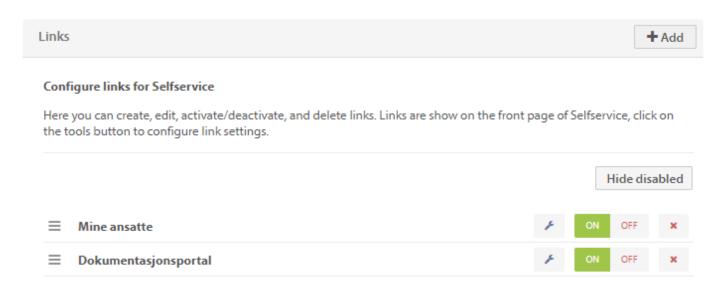
## Deleting a Conditional form

Click **delete** 🗑 to delete an element from the list. The **delete** icon will be greyed out 🗑 if an element in the list have a Conditional form connected to it. Delete the connected Conditional form(s) first.

# Links
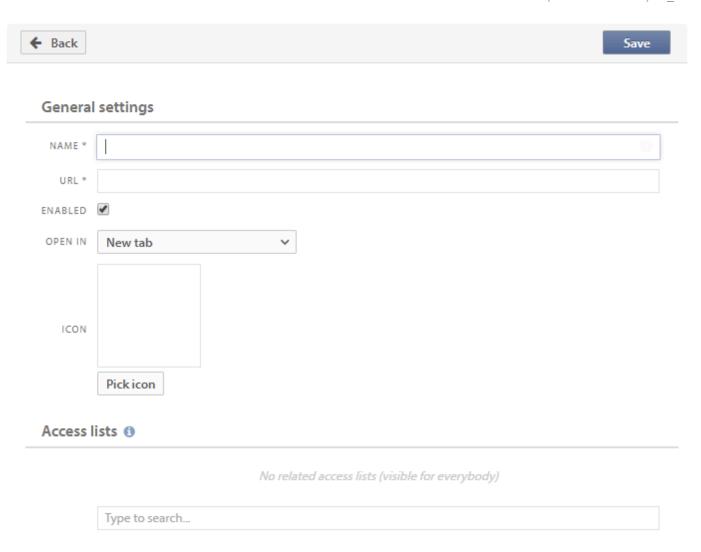
You can create links to third party resources and distribute these links on your Selfservice page. This can be useful if you have other websites like an FAQ, Partner websites, a social page, etc.
In the list of links you can chose to enable/disable published links



## Create new link

Click on **+Add** to create a new link

← Back

Save

## General settings

NAME *

URL *

ENABLED  ☑

OPEN IN  New tab ▾

ICON

Pick icon

## Access lists ⓘ

*No related access lists (visible for everybody)*

Type to search...

# Acess lists

To limit who can see the different links you can use Acces lists. Access lists are lists of specific users which you define in Admin -> Selfservice -> Access Lists.
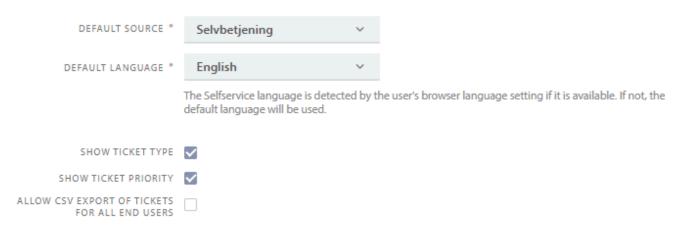
# Settings

For the time being, the only configurable Selfservice settings are the general ones. You can configure the default language in Selfservice, and which default source tickets get when they originate from Selfservice.

**Configure settings for Selfservice**

Here you can configure settings for Selfservice. Visit Selfservice at https://developers08.pureservice.com/ ☑ .

**General settings**

| | |
|---|---|
| DEFAULT SOURCE * | Selvbetjening ⌄ |
| DEFAULT LANGUAGE * | English ⌄ |

The Selfservice language is detected by the user's browser language setting if it is available. If not, the default language will be used.
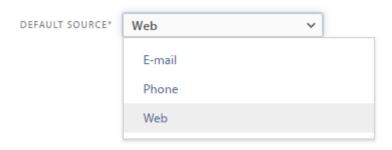
| | |
|---|---|
| SHOW TICKET TYPE | ☑ |
| SHOW TICKET PRIORITY | ☑ |
| ALLOW CSV EXPORT OF TICKETS FOR ALL END USERS | ☐ |

If selected, the button in the ticket list dialog for exporting tickets to CSV will be available for all end users, not just for super users.

## Default source

There are three predefined sources to choose from: **Email**, **Phone** and **Web**.

| | |
|---|---|
| DEFAULT SOURCE* | Web ⌄ |
| | E-mail |
| | Phone |
| | Web |

## Default language

Selfservice selects which language to use based on the users browser settings. This applies *if* the language is supported by Pureservice. Pureservice supports English, Norwegian, Danish and Swedish. Otherwise, Selfservice uses the language that is set as the default one in the Administrator console.

## Show ticket type and priority.

These will toggle if a tickets type and priority will be visible to the end users in the Selfservice portal

## Allow csv export of tickets for all end users

By default only Superusers are allowed to export tickets from the Selfservice portal in the form of a CSV-file. This toggles the option for all users.

## User registration

Enabling this allows users to register their own accounts in the Selfservice portal.
When enabled you also get the option to enable Recaptcha,to minimize the risk of false accounts.



## Superusers
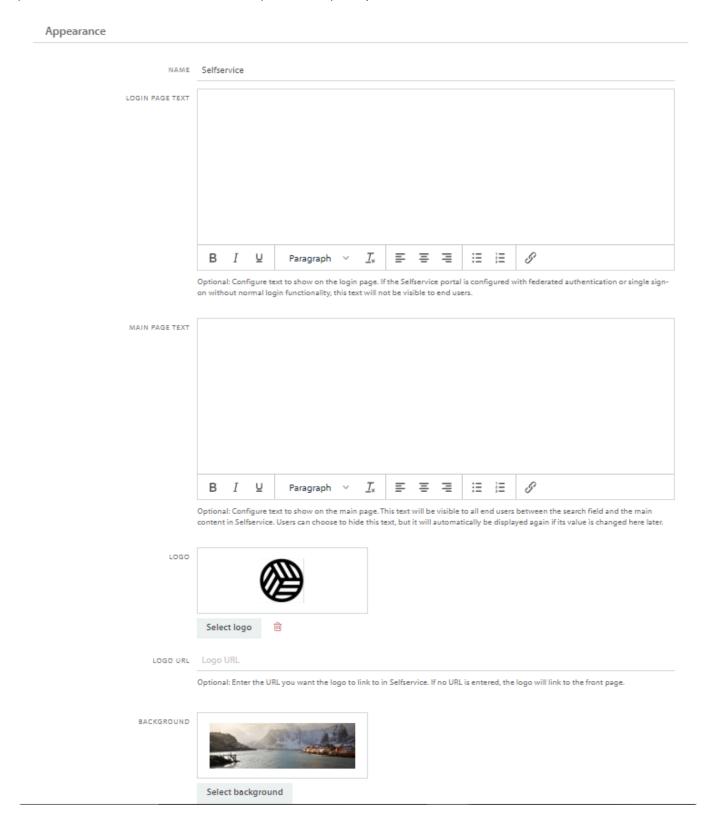
These settings allows you to control who has Superuser access in the Selfservice portal, and what tickets they will have insight to. Hover over the ⓘ button to view a more detailed explanation of the different options.

# Appearance

You can chose to give your Selfservice webpage a different branding by changing the name, login page text, main page text, logo and logo URL. The Main page text is meant as another place to put your welcome text for those who use federated login, where the login text does not appear. In addition you can chose to display a background image in the portal itself. Either choose from one of the presets, or upload your own.
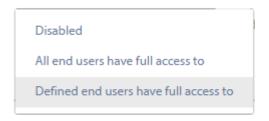
# Superusers

A **Superuser** is someone with a more detailed access to tickets in the **Selfservice** portal, allowing them to view the tickets of other agents within the parameters set.

## Configuration

**Superusers**

CONFIGURATION *    Defined end users hav...  ⌄   ❯   Tickets from their com...  ⌄   ⓘ

This feature allows users to view tickets beyond the tickets they themselves are end users on.

By default the superuser option is disabled. When enabled you select if every end user will have the access, or if only those defined are given the permission.

Disabled

All end users have full access to

Defined end users have full access to

Here you can also choose how narrow a superusers insight into other users tickets will be.

Tickets from their company

Tickets from their company department

Tickets from their company location

Tickets from their company department's location

- **Tickets from their company** means they see the tickets of any user registered to the same company.
- **Tickets from the copany department** means they need to share both comapny and department.
- **Tickets from their company location** means they have to share company and location.
- **Tickets from their company department's location** means that company, department and location must be shared.
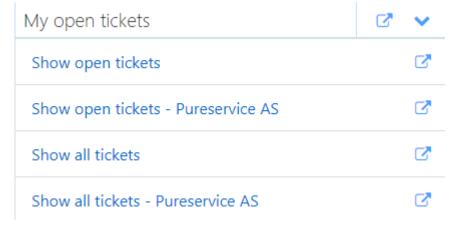
## Activate superusers

If only defined end users will have access, these need to be activated on a per user basis. This is done in the users profile. When the superuser configuration is enabled, a new option will be displayed under user information

USER INFORMATION

| | |
|---|---|
| ROLE | Administrator |
| SUPERUSER | ☑ |
| UNAVAILABLE | ☐ |
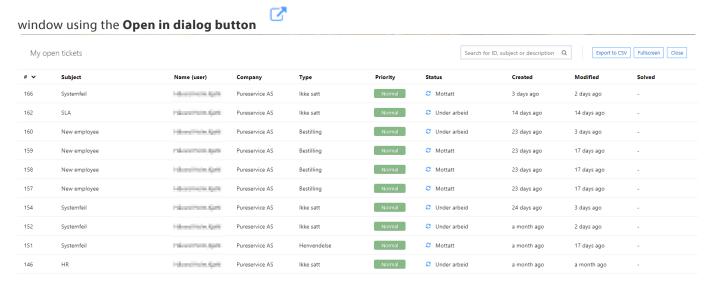
# Selfservice view

When activated as a superuser, the user will see new option in the self service portal.

My open tickets

Show open tickets

Show open tickets - Pureservice AS

Show all tickets

Show all tickets - Pureservice AS

- **Show open tickets** is an overview of all your open tickets
- **Show open tickets – *company name*** gives you an overview off all **open** tickets within the parameter set previously.
- **show all tickets** is an overview of all your tickets.
- **Show all tickets – *company name*** gives you an overview off all tickets within the parameter set previously.

To make it easier to get more detailed and overview of all the tickets, you have the option of opening a separate

window using the **Open in dialog button**

My open tickets

| # ⌄ | Subject | Name (user) | Company | Type | Priority | Status | Created | Modified | Solved |
|---|---|---|---|---|---|---|---|---|---|
| 166 | Systemfeil | | Pureservice AS | Ikke satt | Normal | ↻ Mottatt | 3 days ago | 2 days ago | - |
| 162 | SLA | | Pureservice AS | Ikke satt | Normal | ↻ Under arbeid | 14 days ago | 14 days ago | - |
| 160 | New employee | | Pureservice AS | Bestilling | Normal | ↻ Under arbeid | 23 days ago | 3 days ago | - |
| 159 | New employee | | Pureservice AS | Bestilling | Normal | ↻ Mottatt | 23 days ago | 17 days ago | - |
| 158 | New employee | | Pureservice AS | Bestilling | Normal | ↻ Mottatt | 23 days ago | 17 days ago | - |
| 157 | New employee | | Pureservice AS | Bestilling | Normal | ↻ Mottatt | 23 days ago | 17 days ago | - |
| 154 | Systemfeil | | Pureservice AS | Ikke satt | Normal | ↻ Under arbeid | 24 days ago | 3 days ago | - |
| 152 | Systemfeil | | Pureservice AS | Ikke satt | Normal | ↻ Under arbeid | a month ago | 2 days ago | - |
| 151 | Systemfeil | | Pureservice AS | Henvendelse | Normal | ↻ Mottatt | a month ago | 17 days ago | - |
| 146 | HR | | Pureservice AS | Ikke satt | Normal | ↻ Under arbeid | a month ago | a month ago | - |

Show more (10/69)

# Selfservice Location
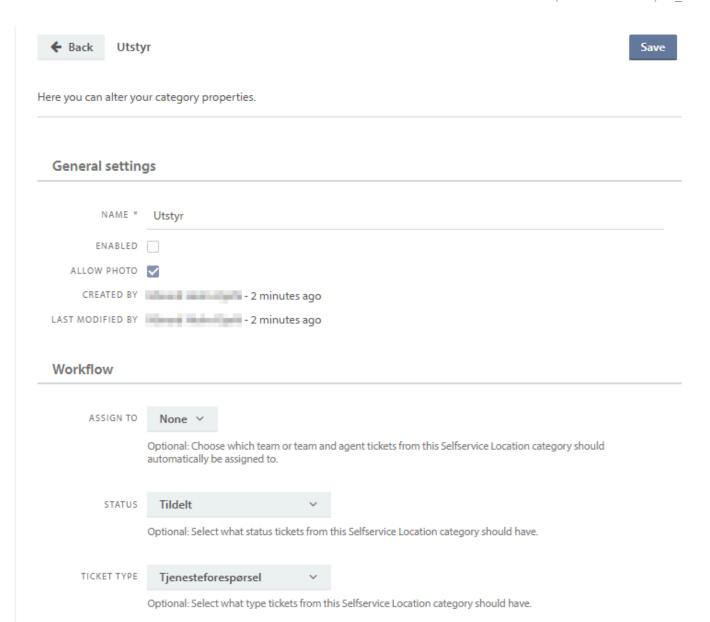
In the Administrator console, you can configure Selfservice Location settings and create categories.

# Categories

Here you can create, edit, activate/deactivate, and delete categories. You can create an unlimited amount of categories. Categories cannot have more than two levels.

Categories

**Configure categories for Selfservice Location**

Here you can create, edit, activate/deactivate, and delete categories. You can create an unlimited amount of categories. Categories cannot have more than three levels.

↓A Z Sort alphabetically      Hide disabled

Type name of a new category (press enter to add)

| | | Gatelys | | ON | OFF | ✖ |
| | | Hull i gata | | ON | OFF | ✖ |
| | | Støy | | ON | OFF | ✖ |
| | | Utstyr | | ON | OFF | ✖ |
| | | Vaktmester | | ON | OFF | ✖ |

By clicking on the options icon, you can alter the category properties.

← **Back**   **Utstyr**                                                    **Save**

Here you can alter your category properties.

## General settings

| | |
|---:|:---|
| NAME * | Utstyr |
| ENABLED | ☐ |
| ALLOW PHOTO | ☑ |
| CREATED BY | ░░░░ ░░░░░ - 2 minutes ago |
| LAST MODIFIED BY | ░░░░ ░░░░░ - 2 minutes ago |

## Workflow

**ASSIGN TO**   None ▾

Optional: Choose which team or team and agent tickets from this Selfservice Location category should automatically be assigned to.

**STATUS**   Tildelt ▾

Optional: Select what status tickets from this Selfservice Location category should have.

**TICKET TYPE**   Tjenesteforespørsel ▾

Optional: Select what type tickets from this Selfservice Location category should have.

# Settings

Under general settings you can change the name of the site, choose your logo, change the map's starting posistion, set the default source of tickets created from Selfservice Location, write a welcome text and confirmation text, set criteria and visibility of contact information of the enduser submitting the case. You can also choose if enduser should receive a receipt and solution when ticket is solved.
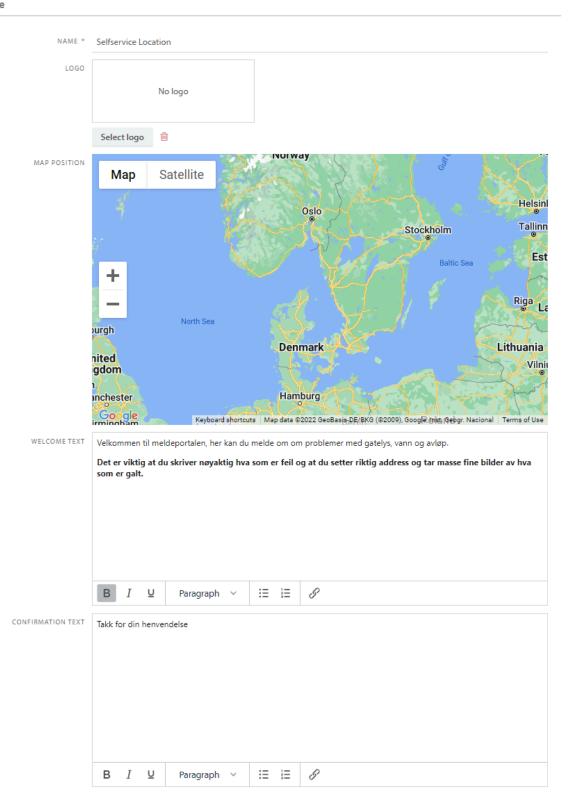
## General settings

DEFAULT SOURCE *    Web ⌄

DEFAULT INTERACTION ZONE *    Professional Services and Support ⌄

This interaction zone is used if no specific zone has been configured when tickets are created through Selfservice Location.

## Appearance

NAME *    Selfservice Location

LOGO

No logo

Select logo 🗑

MAP POSITION

WELCOME TEXT

Velkommen til meldeportalen, her kan du melde om om problemer med gatelys, vann og avløp.

**Det er viktig at du skriver nøyaktig hva som er feil og at du setter riktig address og tar masse fine bilder av hva som er galt.**

| **B** | *I* | U̲ | Paragraph ⌄ | ☰ | ☷ | 🔗 |

CONFIRMATION TEXT

Takk for din henvendelse

| **B** | *I* | U̲ | Paragraph ⌄ | ☰ | ☷ | 🔗 |

## Contact info fields

USE RECAPTCHA    ☑

Enables reCAPTCHA authentication upon registration. This is recommended and more information on how to set up a reCAPTCHA account can be found here. Pureservice only supports reCAPTCHA V2.

# SLM

The SLM (Service Level Management) is a valuable function for maintaining the SLA (Service Level Agreement) to your customers. This is where you define what those agreements are and when they should be applied.

There are three steps to implement good SLM:

## Hours of operation

This is where you define when your service desk is open for business, a.k.a when the SLM clock should tick.

## Service Target Types

Here, you can specify the different types of SLA's you have.
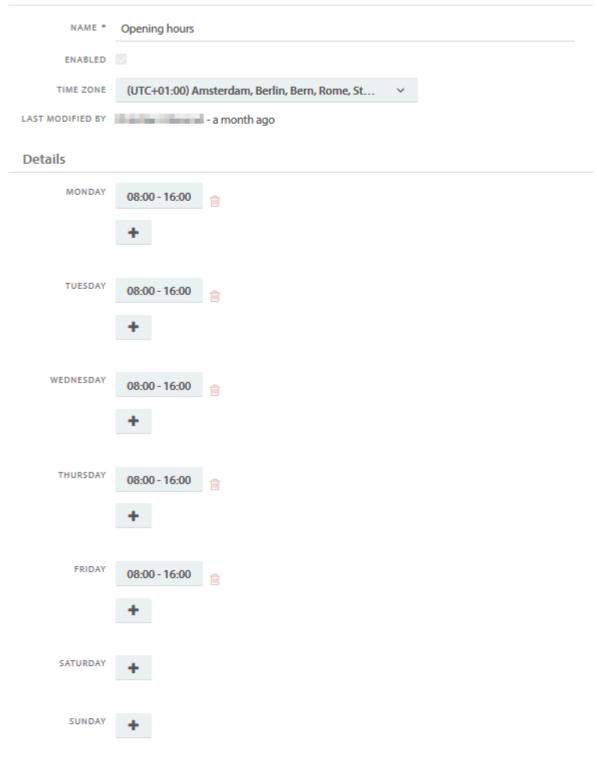
## Service Targets

This is the actual SLA rules for when to apply the Service Targets and who to warn when they are not met.

# Hours of operation

You need to specify when your servicedesk is "open" in terms of operating agents. The SLM will pause the ticking clock outside of Hours of operation. If one of your Service targets has defined 16 hours, and your Hours of operation is 8 hours (08-16), the 16 hours actually means two business days.

You can also add exceptions to your opening hours. Some examples are New Year's Day, Christmas, other national holidays etc. See further down for more information.
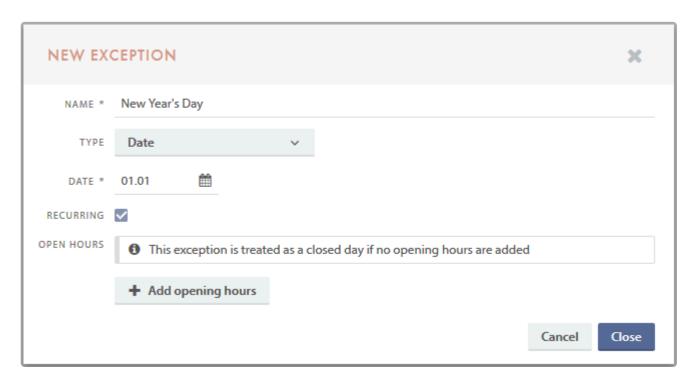
## General settings

| | |
|---|---|
| NAME * | Opening hours |
| ENABLED | ☑ |
| TIME ZONE | (UTC+01:00) Amsterdam, Berlin, Bern, Rome, St…  ⌄ |
| LAST MODIFIED BY | ▓▓▓▓▓▓▓ - a month ago |

## Details

**MONDAY**
08:00 - 16:00  🗑
➕

**TUESDAY**
08:00 - 16:00  🗑
➕

**WEDNESDAY**
08:00 - 16:00  🗑
➕

**THURSDAY**
08:00 - 16:00  🗑
➕

**FRIDAY**
08:00 - 16:00  🗑
➕

**SATURDAY**
➕

**SUNDAY**
➕

## Exceptions

*No items*

➕ Add exception

# Exceptions

Click + Add exception to get started.



Name: Name of the exception that will appear in the list of Exceptions

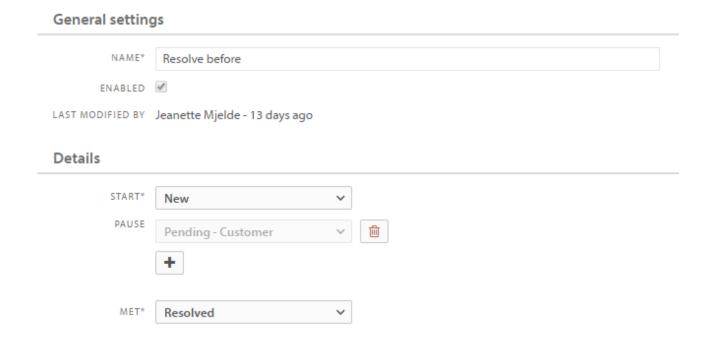Type: Type of exception; Date (one specific date) or Date period (specific start and end dates)

Date / Date period: The single date or period that the exception covers

Recurring: On (recurring every year) or Off (single occurrence)

Open hours: Optional. Exception to the exception, for example if your regular opening hours are 08:00-16:00 and you'll be closing early some time.
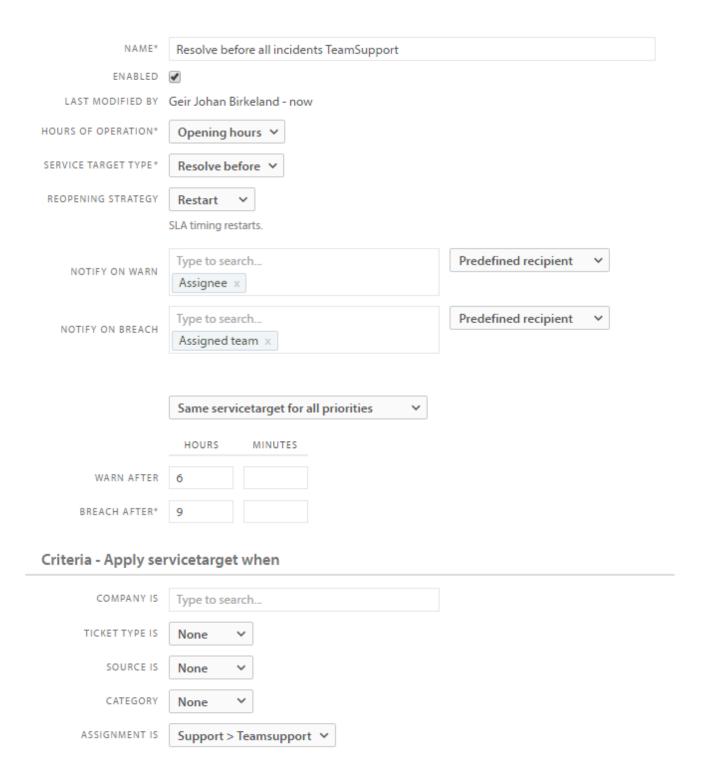
# Service target types

This is where you define your Service target types. The Type is the base configuration of your Service Targets, and where you set which statuses the Service Targets should trigger the Service Targets, which should pause them and when the Service Target should be met.

**General settings**

| | |
|---|---|
| NAME* | Resolve before |
| ENABLED | ☑ |
| LAST MODIFIED BY | Jeanette Mjelde - 13 days ago |

**Details**

| | |
|---|---|
| START* | New |
| PAUSE | Pending - Customer 🗑 |
| | ➕ |
| MET* | Resolved |

# Service targets

The Service Targets is where you fine tune your SLM rules. This is where you specify if a Service Target should apply all incidents, incidents from a specific company, with a specific source, type or category, just incidents assigned to a specific Team, or a combination of all these variables.

You can also specify who should be warned when the Service Target breaches, and define the number of hours and minutes to Warn and Breach.

| | |
|---|---|
| NAME* | Resolve before all incidents TeamSupport |
| ENABLED | ☑ |
| LAST MODIFIED BY | Geir Johan Birkeland - now |
| HOURS OF OPERATION* | Opening hours ⌄ |
| SERVICE TARGET TYPE* | Resolve before ⌄ |
| REOPENING STRATEGY | Restart ⌄ |
| | SLA timing restarts. |
| NOTIFY ON WARN | Type to search...   Assignee x   Predefined recipient ⌄ |
| NOTIFY ON BREACH | Type to search...   Assigned team x   Predefined recipient ⌄ |

Same servicetarget for all priorities ⌄

| | HOURS | MINUTES |
|---|---|---|
| WARN AFTER | 6 | |
| BREACH AFTER* | 9 | |

## Criteria - Apply servicetarget when

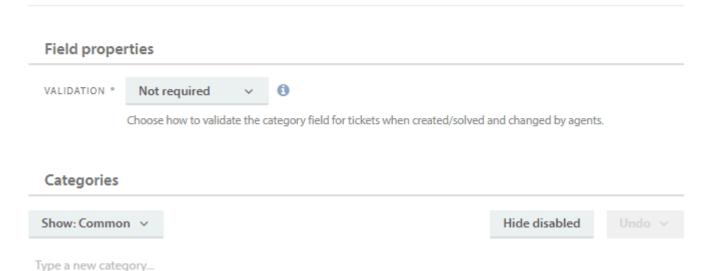| | |
|---|---|
| COMPANY IS | Type to search... |
| TICKET TYPE IS | None ⌄ |
| SOURCE IS | None ⌄ |
| CATEGORY | None ⌄ |
| ASSIGNMENT IS | Support > Teamsupport ⌄ |

# Ticket

Ticket properties can be managed in the Administrator Console, meaning that you can add, edit or delete property values.

# Categories

Categories can be mandatory if chosen in field properties settings. Using them actively can greatly improve the reporting data, as they provide clarity to the registered tickets. The ticket category tree does not come with predefined values, and can be divided into three layers. You can add, rename, enable/disable and delete category values.

**Configure the ticket category tree**

You can add new, rename, enable/disable and delete categories in up to 3 levels/tiers. Note that the configured categories will instantly be available for agents.

**Field properties**

VALIDATION *    Not required    ⌄    ℹ

Choose how to validate the category field for tickets when created/solved and changed by agents.

**Categories**

Show: Common  ⌄                    Hide disabled    Undo  ⌄

Type a new category...

## Field properties

**Field properties**

VALIDATION *    Not required    ⌄    ℹ

Choose how to validate the category field for tickets when created/solved and changed by agents.

This configures how the category field on tickets are validated. The choice will only apply when agents create or change tickets and not when tickets are created or changed via self-service, API, email or other sources.

You can choose between the following settings:

**Not required**
Categorization is not required (default)

**Required when creating**
Categorization is required when agents create tickets

**Required when solving/closing**
Categorization is required when agents are solving or closing tickets

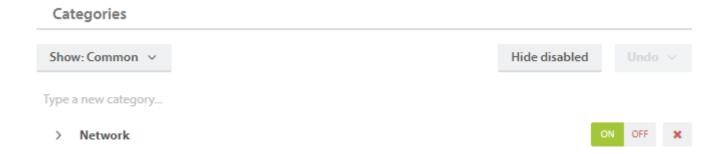**Required when creating and solving/closing**

Categorization is required when agents create/resolve or close tickets

**Required for status change**
Categorization is required when agents change the status of tickets

# Add new category

Type the category name in the input field and press the return/enter key to add a new category. To add a subcategory, type the name in the overlying input field of the parent category.



# Rename category

Double click on the category you want to rename. Press return/enter when you have finished editing the name.

# Enable / disable category
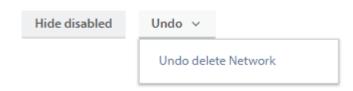
It is possible to deactivate/disable a category without removing it completely from the help desk. Simply press "Off" to do so. To activate/enable the category again, press "On" . Disabling a category already in use by a ticket will *not* remove the ticket's categorization. Disabling a category only restricts new tickets from using it.

The background colours of the buttons indicate whether a category is enabled or disabled. If a category is enabled, the background colour of the "On" button is green. If a category is disabled, the background colour of the "Off" button is dark grey.

Use the "Hide/Show disabled" button to get a sorted overview of the active categories in your organization.
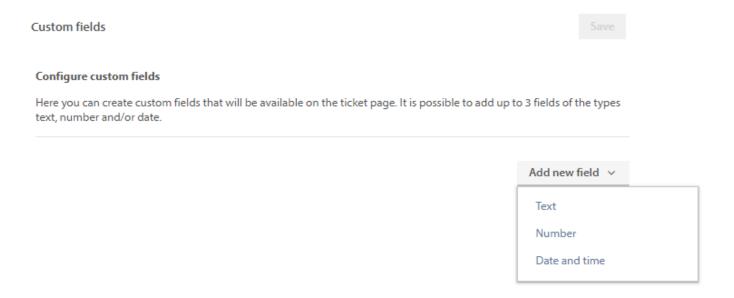
# Delete category

Press to the right of a category to delete it permanently. Removing a category already in use by a ticket will *not* remove that ticket's categorization. Removing a category only restricts new tickets from using it. If you regret deleting a category, it can be restored by using the "Undo" button.
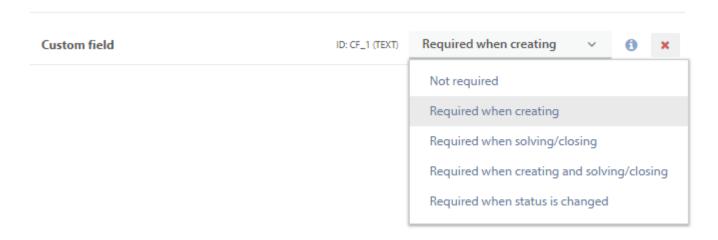
# Custom fields

Here you can create custom fields for tickets that will be available on the ticket page. It is possible to add up to 3 fields of the types text, number and/or date. Custom fields can also be used within lists and filters for example.

**Custom fields**     Save

**Configure custom fields**

Here you can create custom fields that will be available on the ticket page. It is possible to add up to 3 fields of the types text, number and/or date.

Add new field ⌄

Text

Number

Date and time

To add a new custom field, select one of three types of customfields: **Text**, **Number** or **Date and time**.

**Custom field**     ID: CF_1 (TEXT)    Required when creating ⌄   ⓘ ✕

Not required

Required when creating

Required when solving/closing

Required when creating and solving/closing

Required when status is changed

Here you can create a name for the custom field and select one of the five requirements for the custom field:

| Option | Explanation |
|---|---|
| Not required | The field is not required **(chosen by default)** |
| Required when creating | The field is required when agents create tickets |
| Required when solving/closing | The field is required when agents are solving or closing tickets |
| Required when creating and solving/closing | The field is required when agents create/resolve or close tickets |
| Required for status change | The field is required when agents change the status of tickets |

This configures how the custom field are validated on tickets. The choice will only apply when agents create or change tickets and not when tickets are created or changed via self-service, API, email or other sources.
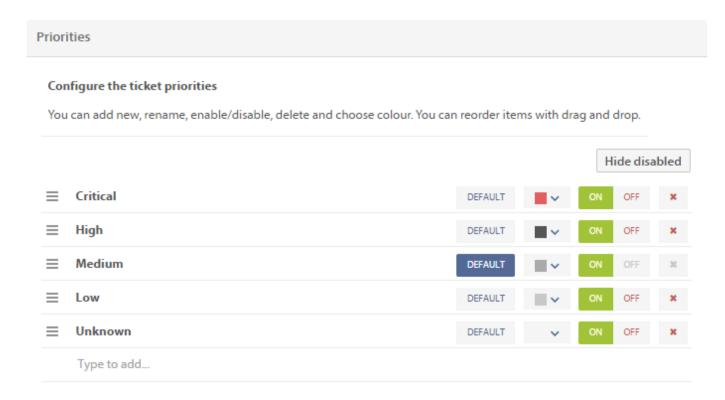
| ☰ | **Customer Name** | ID: CF_1 (TEXT) | Required when creating ⌄ | ⓘ | ✖ |
| ☰ | **Project Number** | ID: CF_4 (NUMBER) | Required when solving/cl... ⌄ | ⓘ | ✖ |
| ☰ | **Deadline** | ID: CF_7 (DATE AND TIME) | Required when status is c... ⌄ | ⓘ | ✖ |

Add new field ⌄   ⓘ

Above is an example of how three configured custom fields can look. The unique identifiers **(ID: CF_x)** will also be shown after creation.

# Priorities

A ticket's priority determines its importance and how it is handled by agents. The priority is usually determined by assessing the ticket's impact and urgency, where

- **Urgency** is a measure of how quickly a resolution is required.
- **Impact** is a measure of the extent of the ticket and the potential damage it causes before it can be resolved.

Priorities should always be listed with the most important priority at the top of the list, and the least important one at the bottom.



Pureservice comes with a set of predefined priority values, and a default priority. It is possible to add, rename, enable/disable, set a default priority, delete, choose colour and reorder the list.

## Add new priority

To add a priority, type the priority name into the input field at the bottom of the list and press the return/enter key.

## Rename priority

Click on the name of an existing priority and enter a new name. Press the return/enter key to save the new name.

## Enable / disable priority

It is possible to deactivate/disable a priority without removing it completely from the help desk. Simply press "Off" to do so. To activate/enable the priority again, press "On". Disabling a priority already in

use by a ticket will *not* remove the ticket's priority. Disabling a priority only restricts new tickets from using it.

The background colours of the buttons indicate whether a priority is enabled or disabled. If a priority is enabled, the background colour of the "On" button is green. If a priority is disabled, the background colour of the "Off" button is dark grey.

Use the "Hide disabled/Show disabled" button to get a sorted view of the active priorities.

# Default priority

Pureservice requires a default priority. The default priority is assigned to all new tickets unless an agent opts for another priority during the registration process. You can change the default priority by pressing the "Default" button associated with the priority.

# Delete priority

Priorities can be removed permanently by pressing  . Removing a priority already in use by a ticket will *not* remove that ticket's priority. Removing a priority only restricts new tickets from using it.

The default priority cannot be deleted.

# Set colour

Colourizing a priority can help agents get a quick overview of the severity of a ticket. Change the colour of a priority by pressing the colour button.
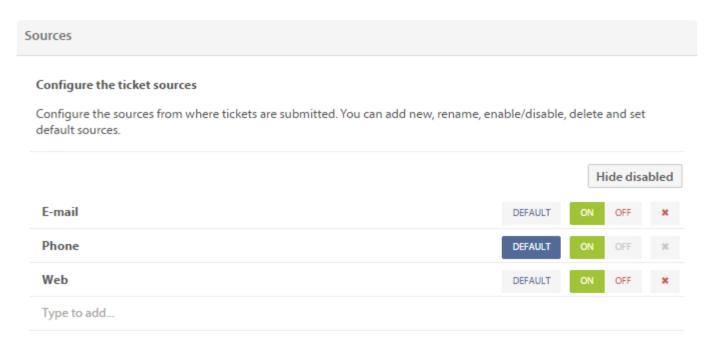


# Reorder priority list

Hover over the hamburger menu to the left of a priority to enable drag-and-drop.

# Sources

A ticket's source identifies the origin of the ticket. The help desk comes with predefined source values, including a default source. Pureservice automatically selects the appropriate source for tickets generated by the inbound channels. The source of tickets created manually is set to the default source unless an agent changes it.



In the Administrator Console you can manage the predefined source values and the customized ones. You can add, rename, enable/disable, remove, as well as set a default source.

## Add new source

Type a source name into the input field at the bottom of the source list and press the return/enter key to add a new source.

## Rename source

Click on the name of an existing source and enter a new name. Press the return/enter key to save the new name.

## Enable / disable source

It is possible to deactivate/disable a source without removing it completely from the help desk. Simply press "Off"  to do so. To activate/enable the source again, press "On" . Disabling a source already in use by a ticket will not remove the ticket's source. Disabling a source only restricts new tickets from using it.

The background colours of the buttons indicate whether a source is enabled or disabled. If a source is enabled, the background colour of the "On" button is green. If a source is disabled, the background colour of the "Off" button is dark grey.

Use the "Hide disabled/Show disabled" button to get a sorted view of the active sources.

# Default source

A default source is required. You can change the default source by pressing the "Default" button.

# Delete source

Sources can be deleted permanently by pressing     . Removing a source already in use by a ticket will *not* remove that ticket's source. Removing a source only restricts new tickets from using it.

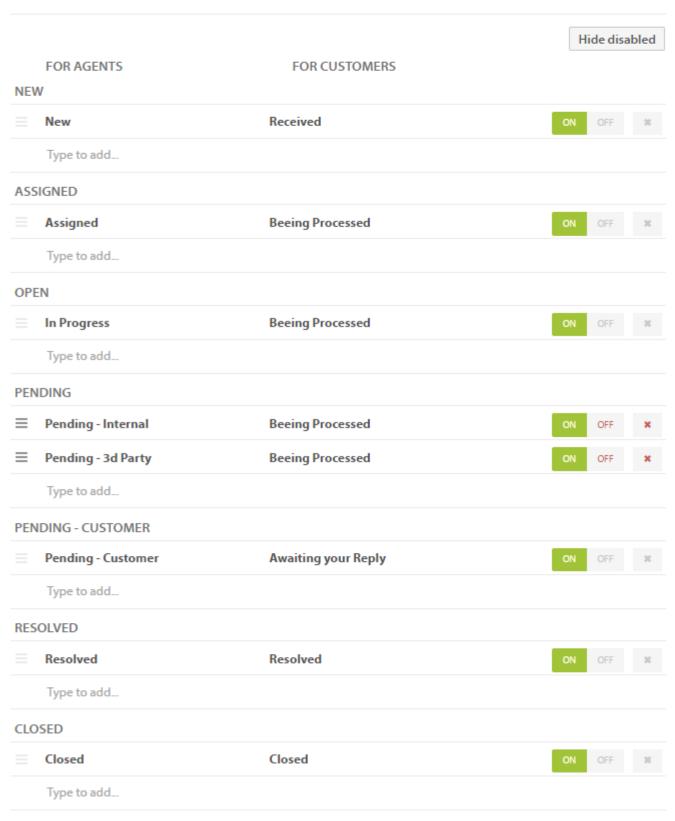The default source cannot be deleted.

# Statuses

The status defines a ticket's life cycle, and as an administrator you can manage the status values. You can add new, rename, enable/disable, delete and set a default status.

## Statuses

### Configure the ticket statuses

You can add new, rename, enable/disable, delete and set default status. The status defines a ticket's life cycle. Setting a status as default is only possible when there is more than one status in a group.

Hide disabled

| | FOR AGENTS | FOR CUSTOMERS | | |
|---|---|---|---|---|
| **NEW** | | | | |
| | **New** | **Received** | ON OFF ✕ | |
| | Type to add... | | | |
| **ASSIGNED** | | | | |
| | **Assigned** | **Beeing Processed** | ON OFF ✕ | |
| | Type to add... | | | |
| **OPEN** | | | | |
| | **In Progress** | **Beeing Processed** | ON OFF ✕ | |
| | Type to add... | | | |
| **PENDING** | | | | |
| | **Pending - Internal** | **Beeing Processed** | ON OFF ✕ | |
| | **Pending - 3d Party** | **Beeing Processed** | ON OFF ✕ | |
| | Type to add... | | | |
| **PENDING - CUSTOMER** | | | | |
| | **Pending - Customer** | **Awaiting your Reply** | ON OFF ✕ | |
| | Type to add... | | | |
| **RESOLVED** | | | | |
| | **Resolved** | **Resolved** | ON OFF ✕ | |
| | Type to add... | | | |
| **CLOSED** | | | | |
| | **Closed** | **Closed** | ON OFF ✕ | |
| | Type to add... | | | |

The two columns **For Agents** and **For Customers** represent how the statuses are displayed in the different consoles. **New**, **Assigned**, **Open**, **Pending**, **Pending – Customer**, **Resolved** and **Closed** are the default status groups. They are

also referred to as the core statuses. You cannot add, edit or delete groups, only the values within them.

# From Resolved to Closed

Pureservice automatically sets a ticket's status to Closed five days after is has been set to Resolved. The number of days before a ticket automatically closes can be managed in the [Workflow](#) center.

# Add new status

Each group has an input field in the bottom. Type a status name in the field and press enter to add a new status.

Type to add...

# Rename status

Click on a status name, either predefined or custom made, to edit it. You can change the name in both columns (**For Agents** and **For Customers**).

# Enable / disable status

It is possible to deactivate/disable a status without removing it completely from the help desk. Simply press "Off" [ON OFF] to do so. To activate/enable the status again, press "On" [ON OFF]. Disabling a status already in use by a ticket will not remove the ticket's status. Disabling a status only restricts new tickets from using it.

The background colours of the buttons indicate whether a status is enabled or disabled. If a status is enabled, the background colour of the "On" button is green. If a status is disabled, the background colour of the "Off" button is dark grey.

Use the "Hide disabled/Show disabled" button to get a sorted view of the active statuses.

# Default status

Setting a status as default is only possible when there is more than one status in a group. This applies for all groups except **Pending**, which cannot have a default status. When needed, the workflow selects a default status from the appropriate group.

# Delete status

Press [ ✖ ] to delete a status permanently. If a group has several predefined statuses, you can delete all of them except the last remaining value. Removing a status already in use by a ticket will *not* remove that ticket's status. Removing a status only restricts new tickets from using it.
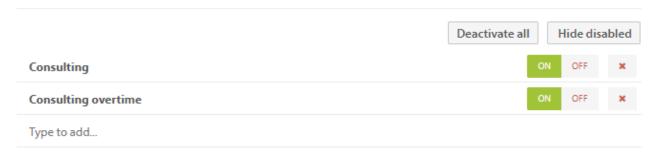
You cannot delete a default status.

# Time log types

Time log types are used to specify specific types of time logging your agents use from time to time to keep it standardized.

You can enable and disable each type as required.
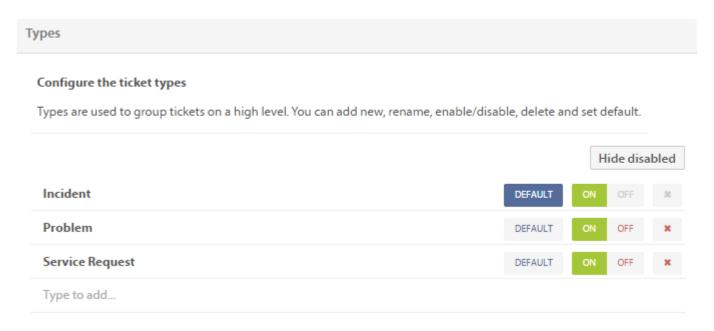
**Configure the time logs types**

Time log types are used as predefined types when registering timelogs on tickets instead of a summary textfield. You can add new, rename, enable/disable and delete.

The active types in the list below are now available when registering ticket time logs. If summary textfield is preferred, deactivate or delete all time log types.

|  |  | Deactivate all | Hide disabled |
|---|---|---|---|
| **Consulting** | | ON OFF | ✖ |
| **Consulting overtime** | | ON OFF | ✖ |
| Type to add... | | | |

# Types

Ticket types are used to group tickets together. Pureservice offers a set of predefined types that you can manage. In addition, you can add new, rename, enable/disable, delete and set default type.



## Add new type

To add a new type, enter a name in the input field at the bottom of the list and press enter.

## Rename type

Click on the name of the type you want to edit, and rename it.

## Enable / disable type

It is possible to deactivate/disable a type without removing it completely from the help desk. Simply press "Off"  to do so. To activate/enable the type again, press "On"  . Disabling a type already in use by a ticket will not remove the ticket's type. Disabling a type only restricts new tickets from using it.

The background colours of the buttons indicate whether a type is enabled or disabled. If a type is enabled, the background colour of the "On" button is green. If a type is disabled, the background colour of the "Off" button is dark grey.

Use the "Hide disabled/Show disabled" button to get a sorted view of the active types.

## Default type

Pureservice is set up with **Incident** as the default ticket type. All new tickets will be registered with the default type unless an agent opts the type during the registration process. Press the "Default" button to change default type.

# Delete type

Press ![x] to delete a type permanently. Removing a type already in use by a ticket will *not* remove that ticket's type. Removing a type only restricts new tickets from using it.
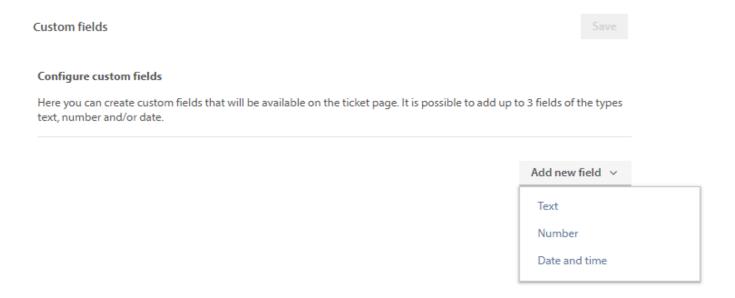
You cannot delete the default type.

# User

Here you will find documentation relevant for the setting on the User page

# Custom fields

Here you can create custom fields for users that will be available on the user page. It is possible to add up to 3 fields of the types text, number and/or date. Custom fields can also be used within lists and filters.

To add a new custom field, select one of three types of custom fields: **Text**, **Number** or **Date and time**.

Here you can create a name for the custom field and select one of the three requirements for the custom field:

| Option | Explanation |
|---|---|
| Not required | The field is not required **(chosen by default)** |
| Required | The field is required when agents create the user, or if any changes is being made |
| Required when creating | The field is required when agents create a new user, but existing users can be edited without filling inn the field |

This configures how the custom field are validated on users. The choice will only apply when agents create or change users and not when they are created or changed via API or other sources.
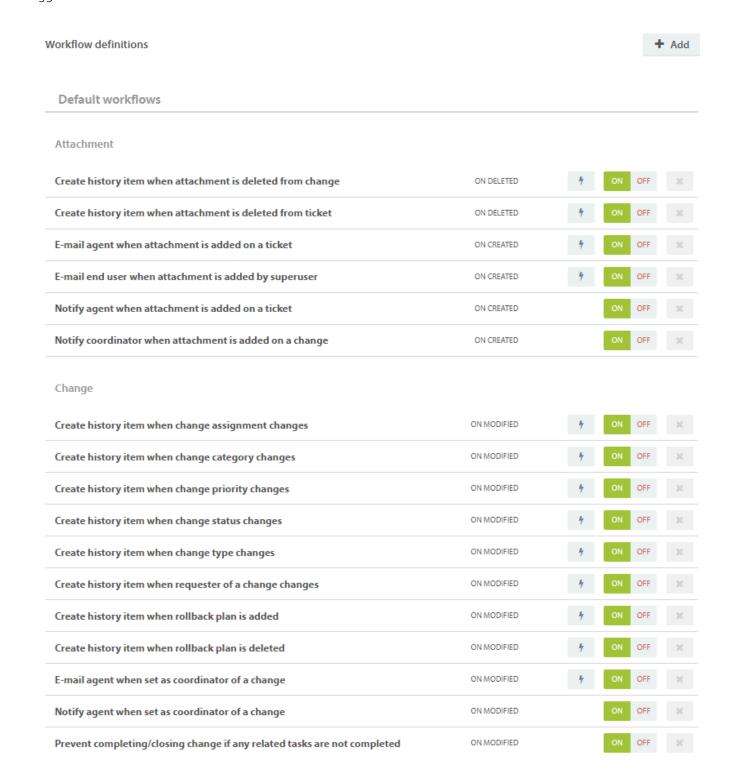
| ☰ | **Environment** | ID: CF_1 (TEXT) | Required when creating ⌄ | ⓘ | ✖ |
| ☰ | **Account number** | ID: CF_4 (NUMBER) | Required ⌄ | ⓘ | ✖ |
| ☰ | **Contract expiration** | ID: CF_7 (DATE AND TIME) | Not required ⌄ | ⓘ | ✖ |

Above is an example of how three configured custom fields can look. The unique identifiers **(ID: CF_x)** will also be shown after creation.

# Workflow

Pureservice is delivered with a set of predefined workflows, which you can enable or disable in the Administrator Console. Some of the workflows are also editable.

# Definitions

In this section you can view and enable/disable workflows. Each workflow has an explanatory name, when it is triggered and if it is enabled or not.

| Workflow definitions | | | | + Add |
|---|---|---|---|---|
| **Default workflows** | | | | |
| **Attachment** | | | | |
| Create history item when attachment is deleted from change | ON DELETED | ⚡ | ON OFF | ✕ |
| Create history item when attachment is deleted from ticket | ON DELETED | ⚡ | ON OFF | ✕ |
| E-mail agent when attachment is added on a ticket | ON CREATED | ⚡ | ON OFF | ✕ |
| E-mail end user when attachment is added by superuser | ON CREATED | ⚡ | ON OFF | ✕ |
| Notify agent when attachment is added on a ticket | ON CREATED | | ON OFF | ✕ |
| Notify coordinator when attachment is added on a change | ON CREATED | | ON OFF | ✕ |
| **Change** | | | | |
| Create history item when change assignment changes | ON MODIFIED | ⚡ | ON OFF | ✕ |
| Create history item when change category changes | ON MODIFIED | ⚡ | ON OFF | ✕ |
| Create history item when change priority changes | ON MODIFIED | ⚡ | ON OFF | ✕ |
| Create history item when change status changes | ON MODIFIED | ⚡ | ON OFF | ✕ |
| Create history item when change type changes | ON MODIFIED | ⚡ | ON OFF | ✕ |
| Create history item when requester of a change changes | ON MODIFIED | ⚡ | ON OFF | ✕ |
| Create history item when rollback plan is added | ON MODIFIED | ⚡ | ON OFF | ✕ |
| Create history item when rollback plan is deleted | ON MODIFIED | ⚡ | ON OFF | ✕ |
| E-mail agent when set as coordinator of a change | ON MODIFIED | ⚡ | ON OFF | ✕ |
| Notify agent when set as coordinator of a change | ON MODIFIED | | ON OFF | ✕ |
| Prevent completing/closing change if any related tasks are not completed | ON MODIFIED | | ON OFF | ✕ |

# Workflow Builder

You can build new, custom workflows by clicking the "Add" button on the top right of the view. This will open the Workflow Builder

# Edit workflow and see associated templates

An editable workflow is listed with a tools button [🔧]. Click on the tools button to open the settings page.



A Workflow rule that have a template associated to them is listed with the lightning button [⚡].
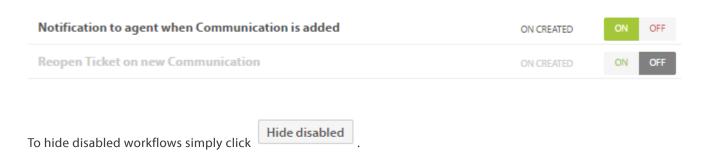


Click on the lightning button to open a small window that will show you which templates the workflow rule is associated with. From here you can easily go to the linked templates by clicking on them.
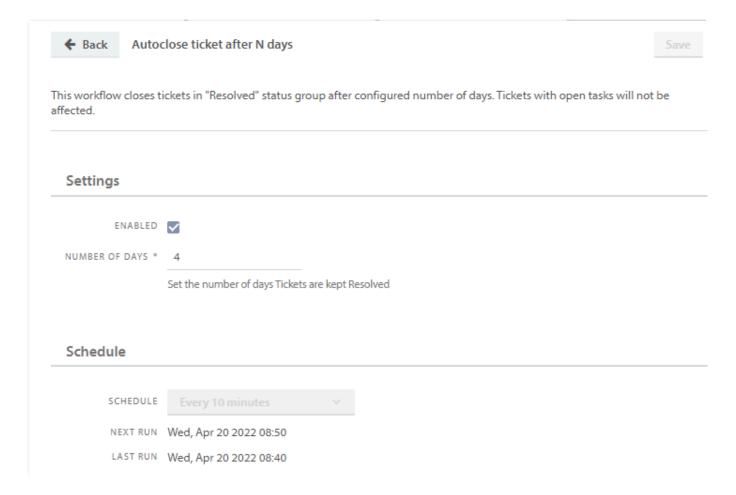


# Enable/disable workflow

The background colour of the "On/Off" buttons indicates whether a workflow is enabled or disabled. If a workflow is enabled, the background colour of the "On" button is green. If a workflow is disabled, the background colour of the "Off" button is dark grey.



To hide disabled workflows simply click [Hide disabled] .

# Workflow settings

Editable workflows have a short introduction to explain exactly how they work. The picture below illustratres how the "Autoclose Ticket after N days", a Scheduled workflow, is configured by default.



## Settings
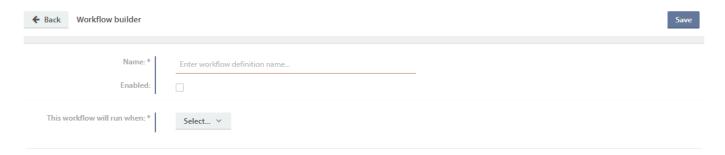
Under the section "Settings", you can choose to enable or disable it, and set the number of days tickets are kept Resolved. In the picture, the number of days is set to 4, meaning that tickets with the status "resolved" are closed automatically after 4 days.

# Workflow builder

## Building a custom workflow

You can build your own workflow by using the workflow builder we've introduced to the application.
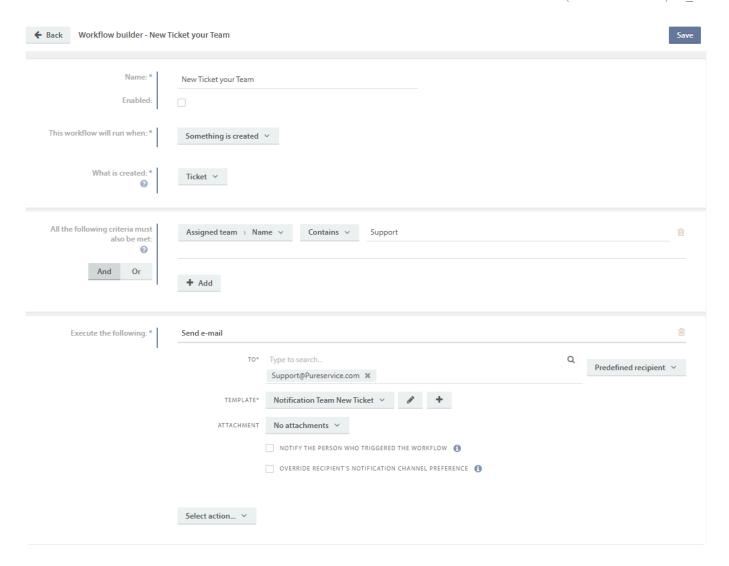
To create a new workflow, start with giving it a name you can easily recognize. You can chose whether to enable the rule immediately, or at a later time.
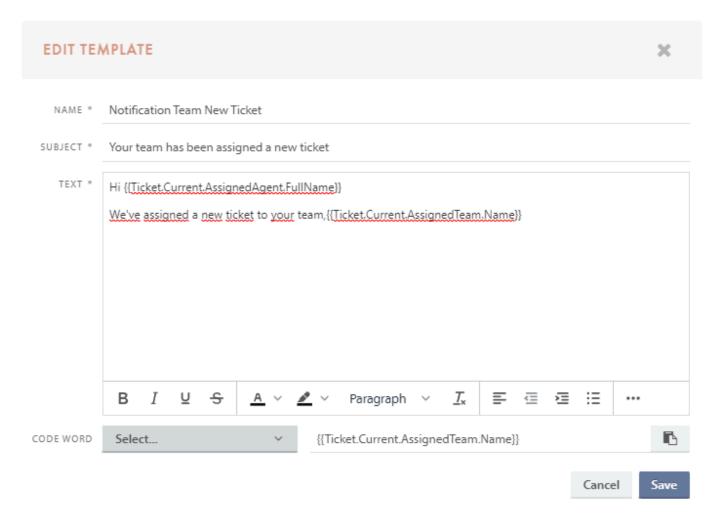


The following steps are basic "If-this-then-that" logic and consists of chosing when the workflow should run, which conditions it should have and what it should do when those conditions are met.
Standard workflows will not send emails to end users when the case "Enduser visibility" is "Not visible". For custom workflows, you need to set this as a criteria ("Enduser visibility" "Is not" "Not visible").

The example below shows a workflow that will send an email to a specific email address when a new Ticket is registered with Priority above Normal, and it is using a custom email template called "Notification Team New Ticket"

← Back    **Workflow builder - New Ticket your Team**    Save

Name: *          New Ticket your Team

Enabled:         ☐

This workflow will run when: *          Something is created ∨

What is created: *          Ticket ∨
❓

All the following criteria must
also be met:          Assigned team › Name ∨    Contains ∨    Support          🗑
❓

And    Or          ＋ Add

Execute the following: *          Send e-mail          🗑

TO*          Type to search...          🔍          Predefined recipient ∨
             Support@Pureservice.com ✖

TEMPLATE*          Notification Team New Ticket ∨    ✏    ＋

ATTACHMENT          No attachments ∨

☐ NOTIFY THE PERSON WHO TRIGGERED THE WORKFLOW ⓘ

☐ OVERRIDE RECIPIENT'S NOTIFICATION CHANNEL PREFERENCE ⓘ

Select action... ∨

You can create new templates for your workflows by clicking "New Template" and filling in the mandatory fields. We've also included a small tool to help you pick the right code words for your templates.

## EDIT TEMPLATE ✕

NAME *   Notification Team New Ticket

SUBJECT *   Your team has been assigned a new ticket

TEXT *

Hi {{Ticket.Current.AssignedAgent.FullName}}

We've assigned a new ticket to your team,{{Ticket.Current.AssignedTeam.Name}}

**B**  *I*  U̲  S̶   A ⌄   ✎ ⌄   Paragraph ⌄   I̲ₓ   ≡  ⫷  ⫸  ☰   ⋯

CODE WORD   Select...  ⌄   {{Ticket.Current.AssignedTeam.Name}}   📋

Cancel   **Save**

✳ If chosing existing templates for your workflow it's important to remember that **Notification** templates won't be visible in the menu if your action is **"Send e-mail"** and vice versa

Currently, the workflow builder can send emails, send SMS, send notifications, add internal note, do HTTP POST and HTTP PUT requests (which allows it to integrate with other services), set status, set priority, set type, set assignment, set categories and set visibility.

# Custom workflow criteria

When building a custom workflow, you can set several criteria that needs to be met.



Here's an overview of all available criteria for created/updated on Ticket:

| Main criteria | Sub criteria | Sub criteria |
|---|---|---|
| Assigned agent > | Address > | City |
| | | Country |
| | | Postal code |
| | | Street address |
| | Company > | Customer number |
| | | Name |
| | | Notes |
| | | None |
| | Department | |
| | Disabled | |
| | Email > | Email |
| | Location | |
| | Notes | |
| | Phonenumber > | Phonenumber |
| | Unavailable | |
| | None | |
| Assigned team > | Department | |
| | Language | |
| | Name | |
| | None | |
| Category | | |
| Closed by | | |
| Created by | | |

| | | |
|---|---|---|
| Description | | |
| Enduser visibility | | |
| Form | | |
| Modified by | | |
| Priority > | Index | |
| | None | |
| Reopened by | | |
| Resolved by | | |
| Responded by | | |
| Solution | | |
| Source | | |
| Status > | Core status | |
| | Index | |
| | None | |
| Subject | | |
| Type > | Name | |
| | None | |
| User > | Address > | City |
| | | Country |
| | | Postal code |
| | | Street address |
| | Company > | Customer number |
| | | Name |
| | | Notes |
| | | None |
| | Department | |
| | Disabled | |
| | Email > | Standard e-mail |
| | | Ticket e-mail |
| | Location | |
| | Notes | |
| | Phonenumber > | Phonenumber |
| | None | |

# Custom workflow action

When building a custom workflow, you can choose between the actions **send e-mail**, **send SMS**, **send notification**, **add internal note**, **add task(s)**, **HTTP POST/PUT**, **set status**, **set source**, **set priority**, **set type**, **set assignment**, **set categories**, **set subject** and **set visibility**, and choose which template should be used.

**HTTP POST/PUT** actions can be used together with our API to make changes you normally cannot.
You can find the API documentation here: [https://api-docs.pureservice.com/](https://api-docs.pureservice.com/)

> **!** The API is currently in Beta and it may be changed in the future!
> Pureservice does not support custom solutions built with this, so use at your own risk!
> We also recommend having experience with coding and/or REST APIs, and that you have a solid backup routine.
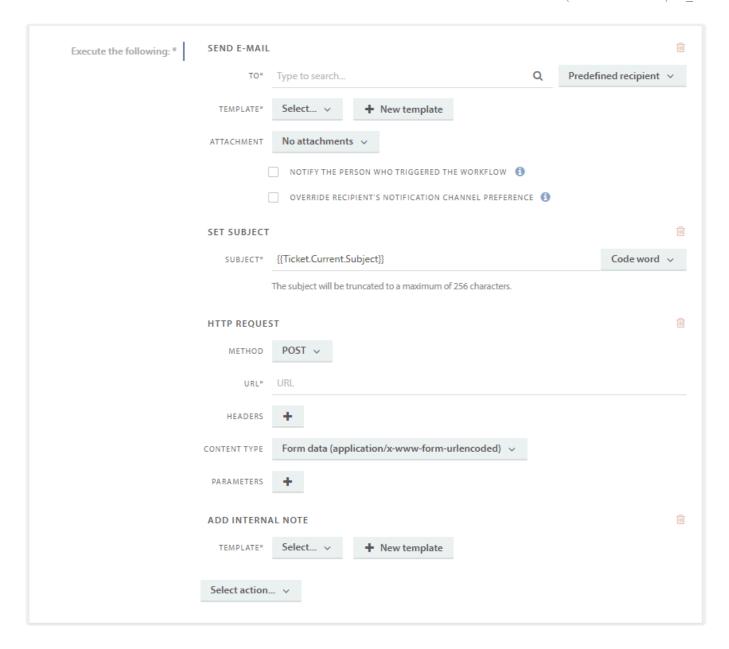
**Notify the person who triggered the workflow**
If a workflow should notify the assignee of a newly assigned ticket, it's common to not notify the assignee if the assigner is the same person. If you check this box the person will still be notified.

**Override recipients notification channel preference**
A recipient has opted for receiving notifications as e-mail only. By selecting this option the workflow will ignore the recipients preferred notification channel and send the recipient a notification.
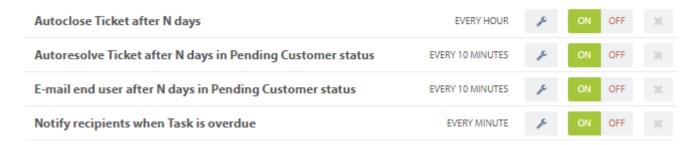
Execute the following: *

**SEND E-MAIL** 🗑

TO* | Type to search... 🔍 | Predefined recipient ⌄

TEMPLATE* | Select... ⌄ | **+** New template

ATTACHMENT | No attachments ⌄

☐ NOTIFY THE PERSON WHO TRIGGERED THE WORKFLOW ⓘ

☐ OVERRIDE RECIPIENT'S NOTIFICATION CHANNEL PREFERENCE ⓘ

**SET SUBJECT** 🗑

SUBJECT* | {{Ticket.Current.Subject}} | Code word ⌄

The subject will be truncated to a maximum of 256 characters.

**HTTP REQUEST** 🗑

METHOD | POST ⌄

URL* | URL

HEADERS | **+**

CONTENT TYPE | Form data (application/x-www-form-urlencoded) ⌄

PARAMETERS | **+**

**ADD INTERNAL NOTE** 🗑

TEMPLATE* | Select... ⌄ | **+** New template

Select action... ⌄

# Scheduled workflows

These are workflows that will run in the background, and can trigger even if there are no changes in status.



**Autoclose Ticket after N days:** This workflow will automatically move a ticket from *Solved* to *Closed*. The change will happen after a specified number of days, where the default is 5

**Autoresolve Ticket after N days in Pending Customer status:** This workflow will automatically close a ticket whose status has not been changed away from *Pending-Customer* for a specified number of days. The default time is 14 days. The email sent will use the template with the same name.

**E-mail end user after N days in Pending Customer status:** Works the same as the workflow above, but will send an email to remind the user instead of closing the ticket. This will also use a template with the same name. The default time set is 7 days, and this workflow should always be set at a lower number than **Autoresolve Ticket after N days in Pending Customer status**
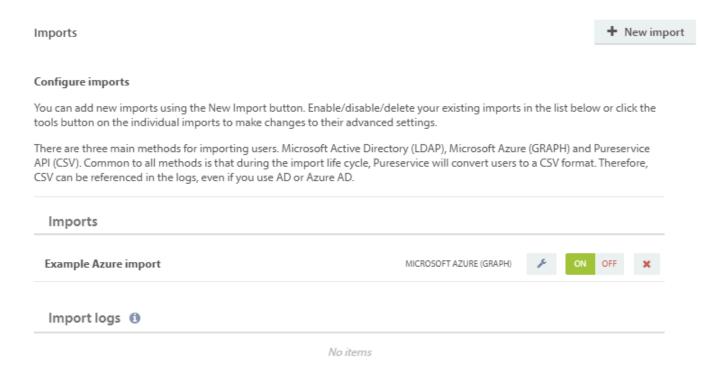
**Notify recipients when Task is overdue:** When a task is assigned to an agent, this is the workflow responsible for informing them that the time limit has run out.

# Imports

As mentioned in the introduction to the **Administrator Guide**, the **Imports** option is *only* visible if Pureservice is installed on-premise. In order to reduce the time spent administrating Pureservice manually, you can use imports to copy data from other systems into the helpdesk. The purpose of imports is to automate the collection of data, e.g. importing users from a directory service.

Each import listed here can be edited, enabled/disabled or deleted.



## Edit import

Press the tools button to edit an import. You can read more about editing imports in the subchapter: Imports – Edit import.

## Enable / disable import

It is possible to deactivate/disable an import without removing it completely from the help desk. Simply press "Off"

 to do so. To activate/enable the import again, press "On"  .

The background colours of the buttons indicate whether an import is enabled or disabled. If an import is enabled, the background colour of the "On" button is green. If an import is disabled, the background colour of the "Off" button is dark grey.
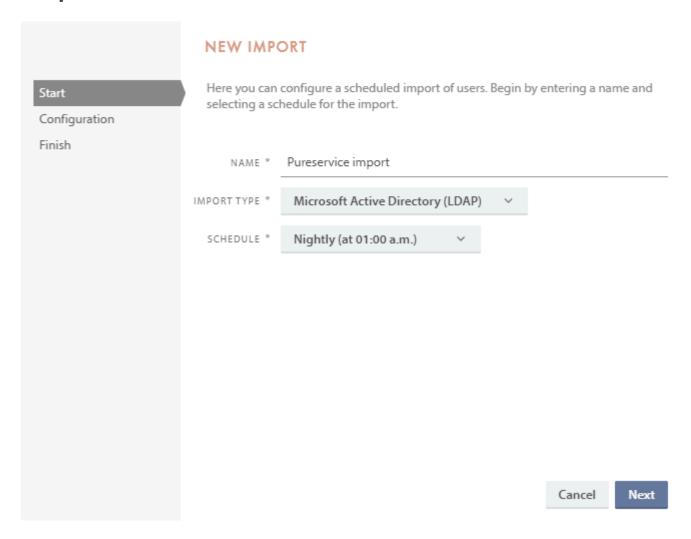
## Delete import

Press  to delete an import permanently.

# New import

To add a new import, click **[+ New import]** in the top-right corner. We currently support **Microsoft Active Directory** and **Microsoft Azure**.

## Step 1 – Start



### Name

The import requires a **Name**, you cannot proceed to the Configuration step without it.

### Import type

The **Import type** is by default set to Microsoft Active Directory, if it's available. Currently only Onpremise solutions support user import from Microsoft Active Directory.
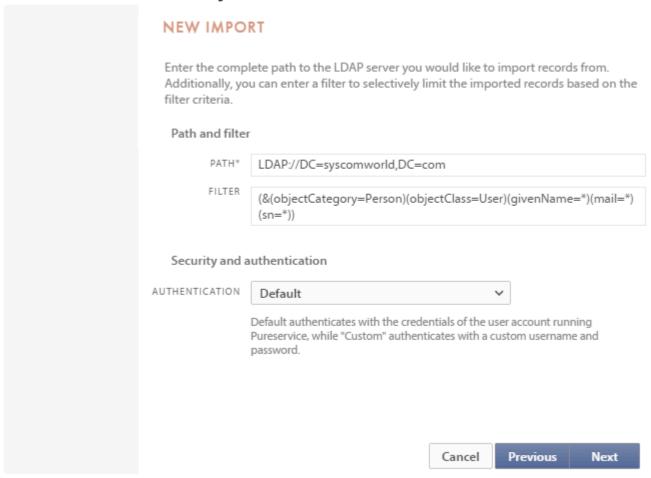
### Schedule

It is also required that you select a **Schedule** for the import. You can choose between these schedules:

# Step 2 – Configuration

## Microsoft Active Directory



**Path**

The **Path** field is required in order to add a new import, and should contain a complete LDAP path name, i.e. a URL (Unified Resource Locator). The format of a complete LDAP pathname is *LDAP://server/distinguished-name*, where the server is the one the LDAP connection is set up towards. You can specify the server by either **hostname**, **NetBIOS name**, or **IP address**. If you do not enter a server name, the path will refer to the local PC.

**Distinguished name**
The Distinguished Name (DN) is a special LDAP-name, which refers to either a single object or whole containers. In Pureservice, three different keywords can be used to specify an object:

- CN: Common Name
- OU: Organizational Unit Name

- DC: Domain Component

Example: if you would like to specify the user object "John Doe" under the OU "Sales" in the domain "syscomworld.com", the complete LDAP pathname is: *LDAP://CN=John Doe,OU=Sales,DC=syscomworld,DC=com.*

**Filter**

**Filter** is an optional field, used to specify the number of records returned from the complete LDAP path. See this Microsoft article for further information on how to create a filter.

**Authentication**

You can choose between these authentication methods for imports:



**Anonymous** means that the LDAP service does not know or care about who is requesting the import – the service will allow access to any data. **Default** authenticates with the credentials of the user account running Pureservice, while **Custom** authenticates with a custom username and password.

## Microsoft Azure

### Azure setup
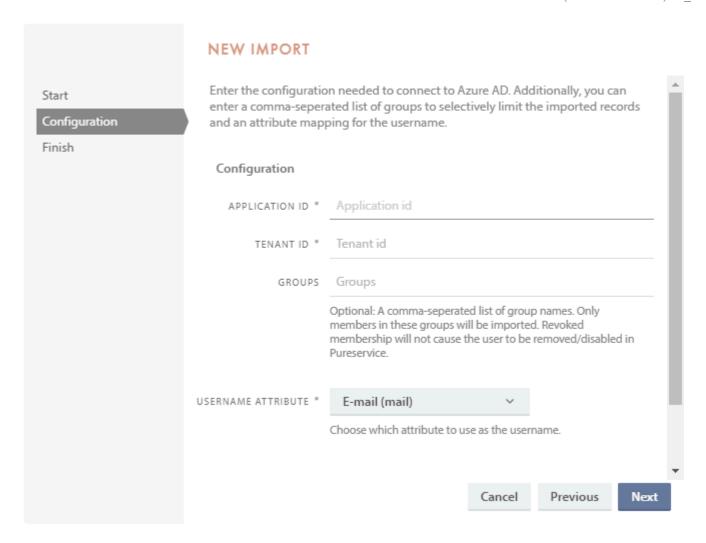
Prior to the setup, an application must be created in the Azure portal.This is done by navigating to **App registrations**, and then selecting **New registration**. You can then give a name to the Azure application, and select if your organization is single or multi-tenant. The optional redirect URI is not need for this import.
The application will require the following application API permissions:

- Group.Read.All
- GroupMember.Read.All
- User.Read.All rettigheter

Once this has been created, we can start the setup in Pureservice

### Pureservice setup

NEW IMPORT

Start

Configuration

Finish

Enter the configuration needed to connect to Azure AD. Additionally, you can enter a comma-seperated list of groups to selectively limit the imported records and an attribute mapping for the username.

## Configuration

APPLICATION ID *    Application id

TENANT ID *    Tenant id

GROUPS    Groups

Optional: A comma-seperated list of group names. Only members in these groups will be imported. Revoked membership will not cause the user to be removed/disabled in Pureservice.

USERNAME ATTRIBUTE *    E-mail (mail)    ⌄

Choose which attribute to use as the username.

Cancel    Previous    Next

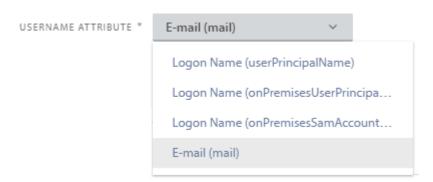These fields require information to be filled in from the Azure app previously mentioned. The **Application ID** and the **Tenant ID** can be found in **Overview** of the app. Copy the information from the Azure app, to the specified fields.
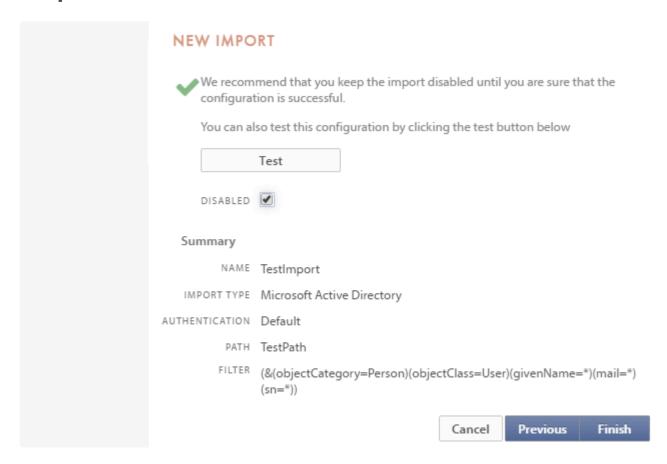
**Groups** is an optional parameter, that will let you specify who you want to import. Only members of the listed groups will be imported, and you can list any number of existing groups using a comma to separate list.

**Username attribute** is the attribute from Azure AD that will be set as the username for each Pureservice user. This is especially important for login, and your Single-Sign On solution. If the user import is used in conjunction with OAuth 2 Azure authentication, UPN is the recommended attribute.

USERNAME ATTRIBUTE *    E-mail (mail)    ⌄

Logon Name (userPrincipalName)

Logon Name (onPremisesUserPrincipa...

Logon Name (onPremisesSamAccount...

E-mail (mail)

**Client Secret** is generated in the Azure app, under *Certificates & secrets*. Once a new secret has been generated, copy **value** in to the specified field.

# Step 3 – Finish



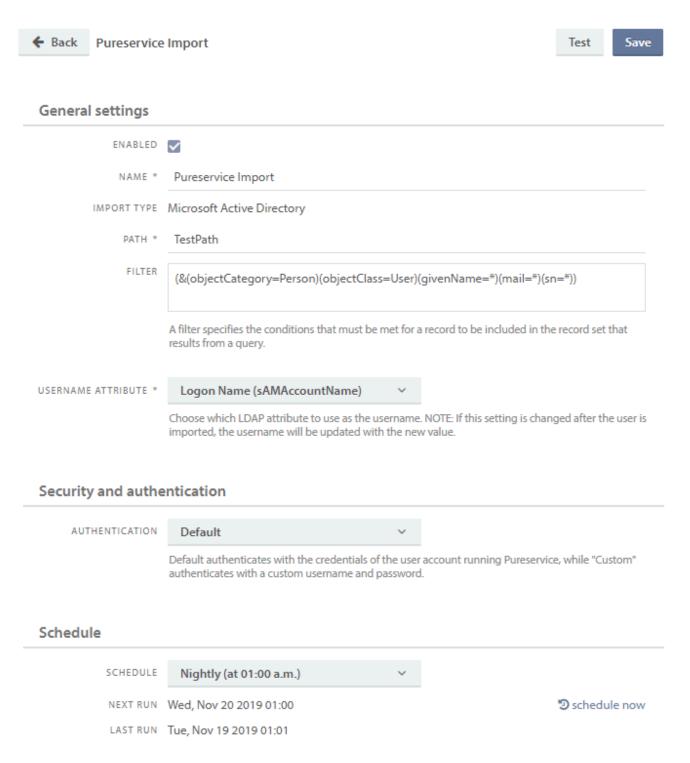You can view all of the chosen settings for the new import in the summary before finishing the wizard. New imports are disabled by default, but can easily be enabled by unchecking the "Disabled" box. If you wish to enable the import at a later time, you can do so in the imports list, or by editing the import after creation.

> ✳ We recommend testing your new import before enabling it.

# Edit import

It is possible to configure the import settings.

← Back   **Pureservice Import**                                    Test   **Save**

## General settings

ENABLED ☑

NAME * Pureservice Import

IMPORT TYPE Microsoft Active Directory

PATH * TestPath

FILTER (&(objectCategory=Person)(objectClass=User)(givenName=*)(mail=*)(sn=*))

A filter specifies the conditions that must be met for a record to be included in the record set that results from a query.

USERNAME ATTRIBUTE * Logon Name (sAMAccountName) ⌄

Choose which LDAP attribute to use as the username. NOTE: If this setting is changed after the user is imported, the username will be updated with the new value.

## Security and authentication

AUTHENTICATION Default ⌄

Default authenticates with the credentials of the user account running Pureservice, while "Custom" authenticates with a custom username and password.

## Schedule

SCHEDULE Nightly (at 01:00 a.m.) ⌄

NEXT RUN Wed, Nov 20 2019 01:00                                    ⟳ schedule now

LAST RUN Tue, Nov 19 2019 01:01

Making changes to an existing import might cause it to malfunction. We recommend that you test the import before you start to use it. Simply click   Test   to do so.

# Templates

Pureservice uses templates to generate emails and messages when communicating with its users. You can view and edit these templates.

> ✳ There are two types of templates: **Email** and **Notification**:
> - **Email** sends e-mails to the defined reciever.
> - **Notification** notify the defined reciever inside the browser.
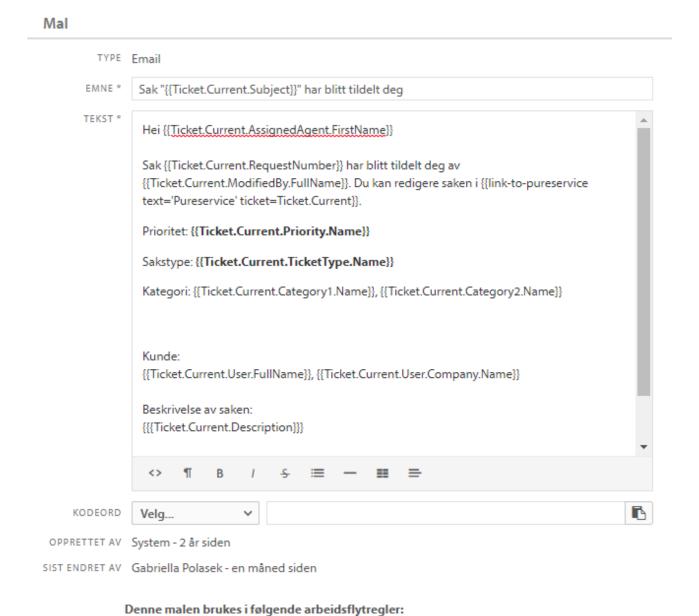
## Templates

### Configure templates

Configure templates used when generating email and messages in the application. Click the tools button to edit the template.

| | |
|---|---|
| **Activate Account** | 🔧 |
| **Create Assignment history on Ticket update** | 🔧 |
| **Create Priority history on Ticket update** | 🔧 |
| **Create Status history on Ticket update** | 🔧 |
| **Create User history on Ticket update** | 🔧 |
| **Default Email template** | 🔧 |
| **New Email On Request** | 🔧 |
| **Password Reset** | 🔧 |
| **Send Email On Ticket Created** | 🔧 |
| **Send Email On Ticket Solved** | 🔧 |
| **Send Email To Followers On Ticket Status Changed** | 🔧 |
| **Send Email When A User Successfully Changes Password** | 🔧 |
| **Update Subscription Validity** | 🔧 |

# Edit template

Click the tools button [wrench icon] to edit a template. A template can either be of the type text, message (text) or message (html). You can change the **type**, **subject** (if the template is a message) and the **text**.

## Email template

# Notification Template

**Mal**

| | |
|---|---|
| TYPE | Notification |
| EMNE * | Triggered Workflow |
| TEKST * | En arbeidsflytsregel har blitt kjørt på sak {{Ticket.Current.RequestNumber}} |
| KODEORD | Velg... |
| OPPRETTET AV | Geir Johan Birkeland - 6 måneder siden |
| SIST ENDRET AV | Geir Johan Birkeland - 6 måneder siden |

**Denne malen er ikke i bruk**

# Placeholders

Placeholders are special words enclosed in square brackets, that "hold" the place for dynamic data. The templates use placeholders.

Here is a list of the most important placeholders:

- Subject
- Description
- Solution
- RequestNumber

E.g., you can use relationships to show the name of the user that created the request:

- User.FullName
- User.FirstName
- User.LastName
- User.Title
- User.Department

There are also some global placeholders:

- SelfServiceUrl (inserts the text to the Selfservice URL). {{ SelfServiceUrl }}#/request/{{ RequestNumber }} creates a URL directly to the request in Selfservice.