

## D6.3 - ELViS HELPDESK: a unified helpdesk system to support researchers access the collections and DoD services

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## Summary

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### 1. Context

The objective of Deliverable 6.3 (D6.3), due 31st January 2021, was to choose and implement a helpdesk as a demonstrator (Technical Readiness Level 6) ready for testing. The deliverable is running here: <https://dissco.jitbit.com>. The helpdesk system will provide support by distributed partners to support researchers access the collections and Digitizing on Demand (DoD) services. This access is provided through Virtual and Transnational Access, which researchers can request through ELViS (the European Loans and Visits System developed in the JRA1 work package). Testing will be done by the NA2 work package towards milestone MS27 (helpdesk system beta operational), which is due 31 July 2021. The scope of the helpdesk and work plan for successfully fulfilling D6.3 was delivered as a milestone report (MS49) “Plan for Helpdesk Implementation” (DOI: 10.5281/zenodo.4064751)” submitted under JRA1 on the 30th September 2020. MS49 outlines, at a high level, the requirements of a helpdesk system initially focused on providing support to ELViS. Long term sustainability requirements are also given in terms of the scalability of the helpdesk to support other services in DiSSCo (the Distributed System of Scientific Collections research infrastructure), although since many of these services need to be developed, their exact needs are yet unknown. Additionally, MS49 provides a preliminary list of ‘off the shelf’ helpdesk systems and an evaluation of their compatibility.

Following onwards, further work was conducted to successfully complete D6.3, which is explained in more detail in Section 2. The work was largely coordinated under NA2 Task 2.4 “Run helpdesk for online support’ partners (MNHN, RBINS, Naturalis, RMCA, NHM) led by CETAF with collaboration and technical support from JRA1 (led by Picturae and Naturalis).

### 2. Work methodology

The work to fulfil D6.3 was completed in the following three phases:

#### **Phase 1: Collation of helpdesk feature requirements - September - Early November 2020.**

T2.4 and JRA1 partners were asked to identify helpdesk functional features needed for the distributed system to provide optimal support for ELViS users, in addition to the ones already listed in MS49 (e.g. ticket system, email support, canned replies, etc.). Feedback was collected in a shared google sheet.

#### **Phase 2: Prioritisation of feature requirements - Early November - Early December 2020**

Feature requirements collected in Phase 1 were prioritised using the MoSCoW Method (Must have, Should have, Could have and Wont have) in order to attain a shared agreement on essential requirements, so that the ‘of the shelf’ helpdesk systems could be critically evaluated for suitability. T2.4 partner’s plus RBGE individually scored features, for example indicating a ‘M’ for must have, ‘S’ for should have, etc. CETAF tallied the number of M, S, C, Ws allocated to each feature, and the



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prioritisation was based on a majority. A meeting was conducted on the 1st December to agree and finalise the prioritisation. Table 1 shows the final results for feature prioritisation.

### Phase 3 Evaluation and shortlisting of systems Early December 2020 - Early January 2021

Altogether, 13 helpdesk systems were evaluated. The shortlisting of the most appropriate helpdesk system for the ELViS has taken into account the required technical features and the price ( allocated budget - 5000 euros). In addition, future sustainability was considered with regards to its expansion to include other DiSSCo services and its ability to be incorporated into the research infrastructure in the future, as well as transferrable to other host servers or clouds, technical expertise needed for maintenance, as well as being affordable long term.

Ranking was primarily done by CETAF, supported by research previously done by T2.4 partners on the different systems as part of MS49. The presence of required features were summed and the systems that had the most 'must have' features, and then 'should have' features were ranked the highest. For the shortlisting of current affordability, price quotas were based on a minimum number of 8 agents. This is the current number of partners involved in T2.4. Most of the helpdesk systems are paid per agent/month, this type of billing is not ideal for assessing sustainability because it is unclear on the number of personnel needed to run the Helpdesk in the future.

Results from the evaluation of present required features and price are as follows:

- **Jitbit** (<https://www.jitbit.com/>) is considered the best choice – for both features and price. It matches almost all of the demands and wishes listed in phase 1 for the ELViS helpdesk. Furthermore it is ideal because of the 1 time payment which includes an unlimited number of agents, important since the system should provide support through a potentially large number of distributed partners, hence a large number of agents. A downside is that upgrades are expensive (around 1000 euros). Thus it depends on how often it needs to be upgraded.
- **Freshdesk** (<https://freshdesk.com/>) and **Happyfox** (<https://www.happyfox.com/>) were ranked 2<sup>nd</sup> and 3<sup>rd</sup> for features, however they are out of budget, and potentially expensive in the long term since their payment type is per agent/per month.
- **Topdesk (4<sup>th</sup>)** (<https://www.topdesk.com/>) also goes beyond the current budget.

The next best systems that are in budget (all have per agent/month billing type):

- Zoho (standard or professional packages), Helpscout, GrooveHQ, live agent.
- Redmine is open source, but ranked because of low presence of feature requirements, and the need for technical expertise to customise the feature and maintain it.

CETAF presented their final rankings/shortlist to T2.4 and JRA1 partners on the 21st December 2020 and gave a deadline of the 8th January 2021 for confirmation of agreement or further recommendations. Two responses were received asking why Redmine was not chosen, to which CETAF responded with the reasons as mentioned above.



**Table 1. The prioritisation of considered helpdesk system requirements.**

<b>Must haves</b>	<b>Should haves</b>	<b>Could haves</b>
Ticketing System	Customisable	Group email distribution
Multi-lingual	Scalable (i.e can be expanded to include other services).	reporting features, dashboard, analysis tools
Trustworthy	Data migration	Split and merge tickets
API integration	AAI Support	
Connect with Github	Form design	
Security	Canned replies	
Good user experience	Resource management tools, tick response times, overview of ticket types.	
File sharing	Collaboration tools	
Storage space		
Alerts and notifications		
Automated workflows		
Email import		



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### 3. Description of Deliverable

The Jitbit system was chosen for implementation of the helpdesk demonstrator due to the completeness of its functionality which matched almost all of the demands and wishes for the ELViS helpdesk, listed during phase 1, it has a user friendly and intuitive interface with possibilities for interoperability with other systems. In addition the JitBit helpdesk system can be run as a SaaS solution on the hosting of the JitBit supplier and also has a reasonable pricing.

A trial version of the JitBit system was configured on the hosting of the JitBit supplier, operational on Wednesday the 27th of January 2021, for a trial period of 21 days, which can be extended.

The first installation and configuration of the ELViS Helpdesk Demonstrator, which can be reached here: <https://discco.jitbit.com>, was done by Picturae and after a short introduction to the SYNTHESYS+ NA2 T2.4 team on Tuesday the 2nd of February 2021, Picturae handed over the admin access to CETAF for further configuration, exploration and testing during the trial period.

The system can take in helpdesk requests in two ways: either automatically via email (by sending an email to: [support@discco.jitbit.com](mailto:support@discco.jitbit.com)), or manually by registered users in the system filling in a helpdesk ticket form. The functionality for turning emails into helpdesk tickets will in due time be connected to the build-in helpdesk form in ELViS.

**Appendix A** provides an overview of the main functionalities that the ELViS Helpdesk Demonstrator now offers, when logged in as an admin user.



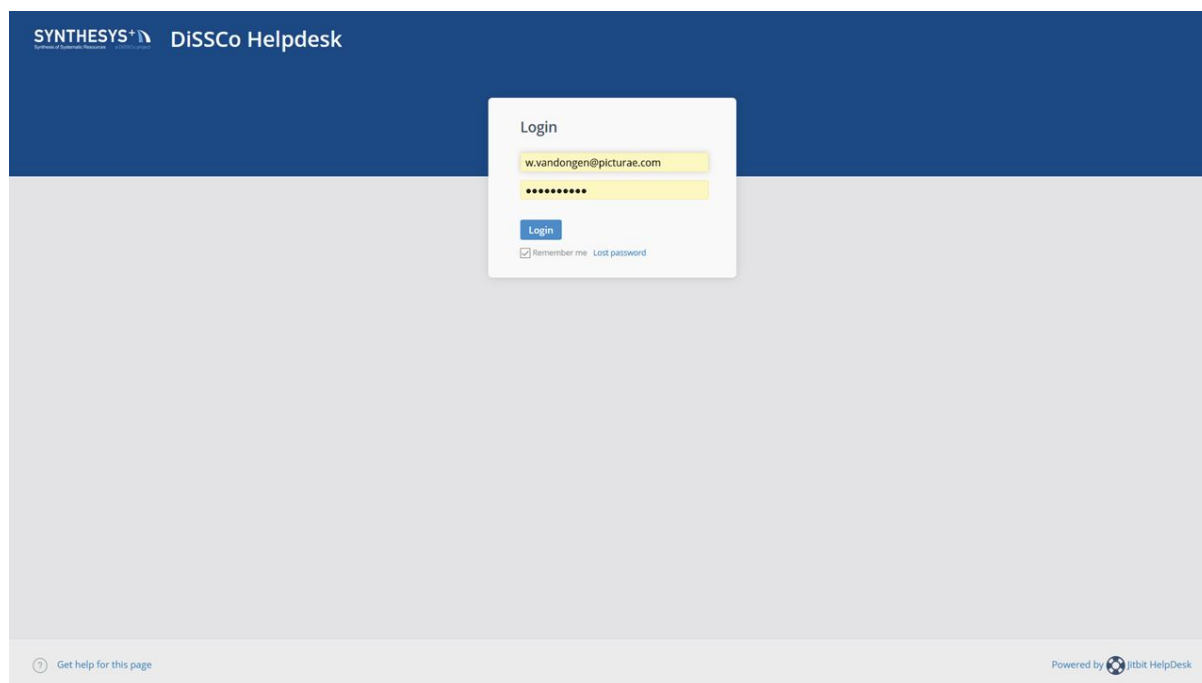
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## Appendix A - Overview of main ELViS Helpdesk Demonstrator functionalities

### General

#### Homepage

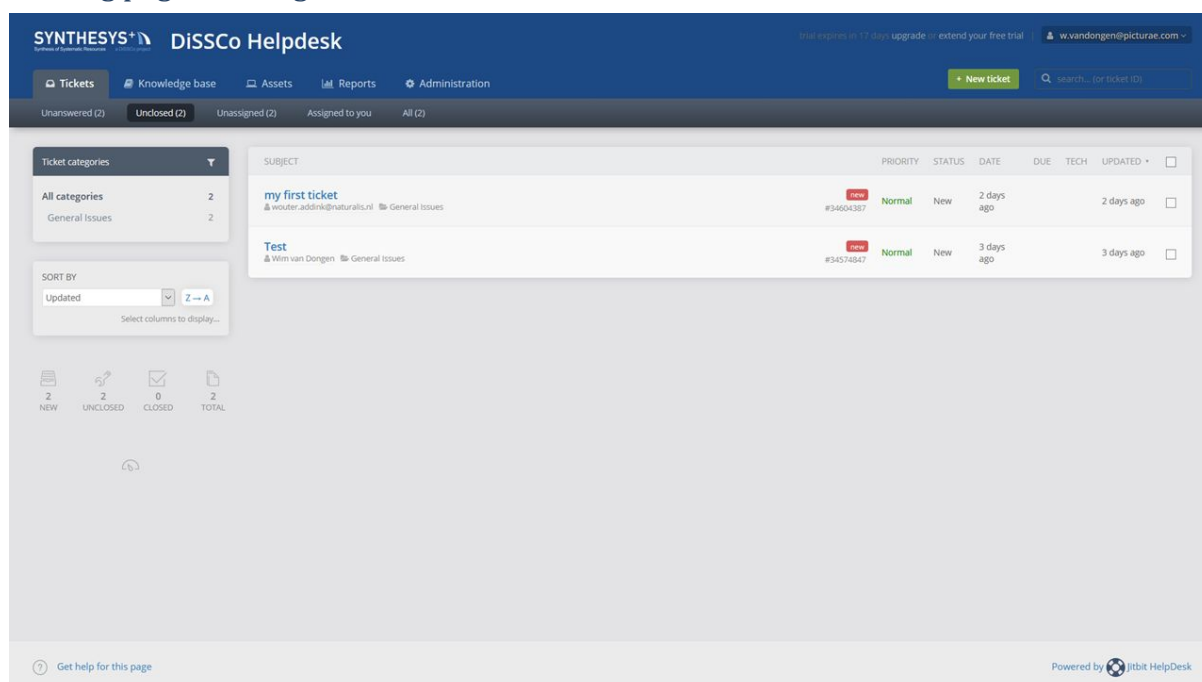


The screenshot shows the DiSSCo Helpdesk homepage. At the top left, there is a logo for SYNTHESYS+ and the text "DiSSCo Helpdesk". In the center, there is a white login form with the following fields and options:

- Username: w.vandongen@picturae.com
- Password: [Redacted]
- Login button
- Remember me checkbox (checked)
- Lost password link

At the bottom left, there is a link "Get help for this page". At the bottom right, it says "Powered by Jitbit HelpDesk".

#### Landing page after login:



The screenshot shows the DiSSCo Helpdesk landing page after login. The top navigation bar includes "SYNTHESYS+ DiSSCo Helpdesk", a user profile "w.vandongen@picturae.com", and a "New ticket" button. Below the navigation bar, there are tabs for "Tickets", "Knowledge base", "Assets", "Reports", and "Administration". The "Tickets" tab is active, showing a list of tickets.

The ticket list has the following columns: SUBJECT, PRIORITY, STATUS, DATE, DUE, TECH, and UPDATED. There are two tickets listed:

SUBJECT	PRIORITY	STATUS	DATE	DUE	TECH	UPDATED
my first ticket wouter.aadink@naturalis.nl • General issues #34664387	Normal	New	2 days ago			2 days ago
Test Wim van Dongen • General issues #34574947	Normal	New	3 days ago			3 days ago

On the left side, there is a "Ticket categories" sidebar with "All categories" (2) and "General Issues" (2). Below that, there is a "SORT BY" dropdown set to "Updated" and a "Select columns to display..." option. At the bottom left, there are icons for "NEW" (2), "UNCLOSED" (2), "CLOSED" (0), and "TOTAL" (2).

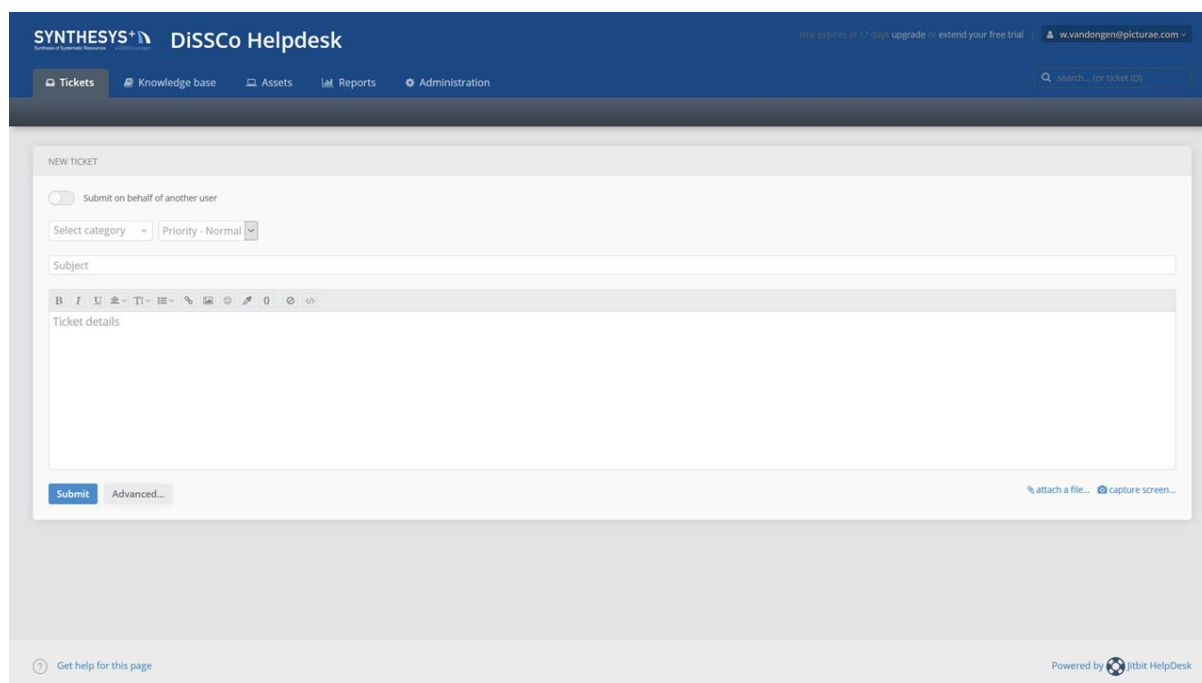
At the bottom left, there is a link "Get help for this page". At the bottom right, it says "Powered by Jitbit HelpDesk".



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## Standard helpdesk ticket form



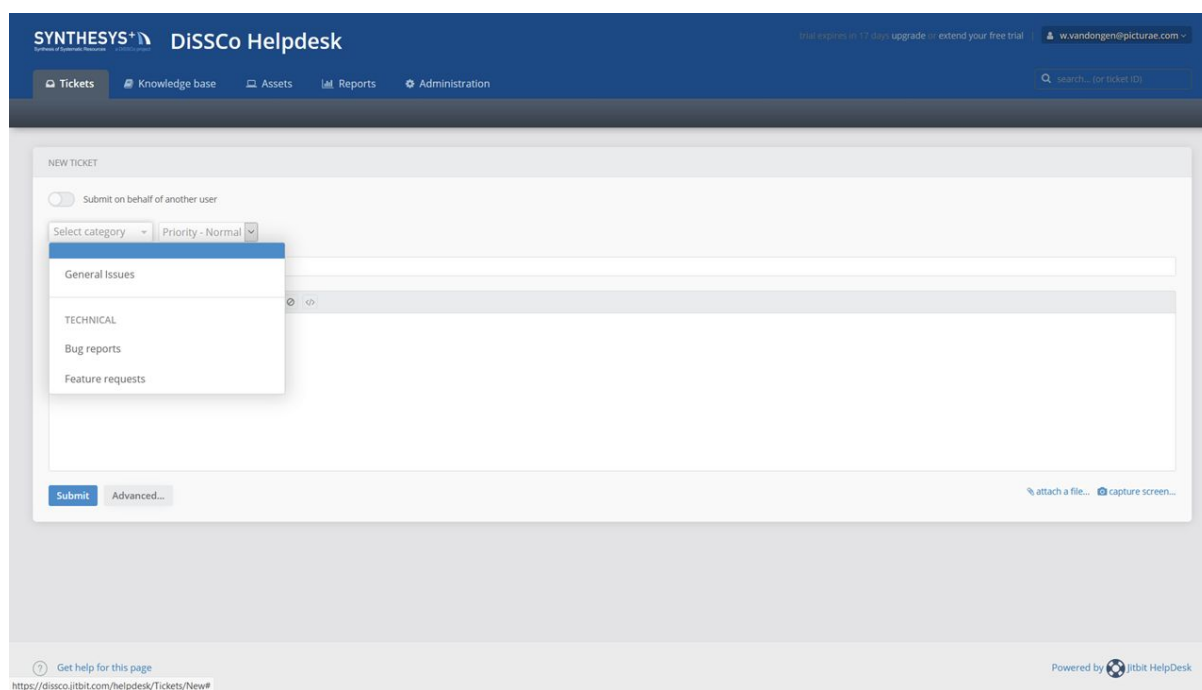
The screenshot shows the 'NEW TICKET' form in the DiSSCo Helpdesk interface. The header includes the SYNTHESYS+ logo, the title 'DiSSCo Helpdesk', and a user profile for 'w.vandongen@pictureae.com'. The navigation menu contains 'Tickets', 'Knowledge base', 'Assets', 'Reports', and 'Administration'. A search bar is located in the top right corner.

The form itself has the following elements:

- A toggle switch for 'Submit on behalf of another user'.
- Dropdown menus for 'Select category' and 'Priority - Normal'.
- A text input field for 'Subject'.
- A rich text editor for 'Ticket details' with a toolbar containing icons for bold, italic, underline, link, unlink, list, image, video, and other formatting options.
- 'Submit' and 'Advanced...' buttons at the bottom left.
- 'attach a file...' and 'capture screen...' links at the bottom right.

At the bottom of the page, there is a 'Get help for this page' link and a 'Powered by Jitbit HelpDesk' logo.

## Categories for standard helpdesk ticket form



This screenshot is identical to the previous one, but with the 'Select category' dropdown menu open. The menu lists the following categories:

- General Issues
- TECHNICAL
- Bug reports
- Feature requests

The 'Submit' and 'Advanced...' buttons are visible at the bottom left, and the 'attach a file...' and 'capture screen...' links are at the bottom right. The footer includes the 'Get help for this page' link and the 'Powered by Jitbit HelpDesk' logo.



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## Prioritisation for standard helpdesk ticket form

The screenshot shows the 'NEW TICKET' form in the DiSSCo Helpdesk interface. The form includes a 'Submit on behalf of another user' toggle, a 'Select category' dropdown menu, and a 'Subject' text input field. The priority dropdown menu is open, showing options: Low, Normal, High, and Critical (highlighted in red). Below the subject field is a rich text editor with 'Ticket details' and a 'Submit' button. The interface also shows navigation tabs for Tickets, Knowledge base, Assets, Reports, and Administration, along with a search bar and a footer with 'Powered by Jitbit HelpDesk'.

## Options of Administration tab

### Options for configuring the helpdesk functionality 1 / 2

The screenshot displays the 'Administration' tab in the DiSSCo Helpdesk interface. It is divided into three sections: 'General settings', 'Tickets', and 'Advanced'. Under 'General settings', there are options for 'General settings' (General application settings: colors, options, etc.), 'Email settings' (Email-integration settings - notifications, inbound emails etc.), and 'Users' (Users and their companies, roles and permissions). Under 'Tickets', there are options for 'Ticket categories' (Adding/removing ticket (and KB) categories, editing permissions to handle tickets in categories), 'Custom fields' (Custom fields you might want to add to your tickets. Like "order number" or "issue type" etc.), 'Custom statuses' (Add custom statuses besides the default "new", "in process" and "closed"), and 'Canned responses' (Canned responses). The 'Advanced' section is partially visible at the bottom.



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## Options for configuring the helpdesk functionality 2 / 2

## Administration – general settings



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### General settings

Helpdesk URL:  jibit.com

Custom domain:  Leave blank to disable this feature. [More info about custom domains](#)

Helpdesk title (displayed on top):  Title link (optional):

Note on the ticket creation page:  This note is shown at the top of the ticket creation page and in the widget. Use it to provide some tips for users before they create a new ticket. Or to add a checkbox-input requiring users to agree to your TOS/Privacy policy. HTML allowed. Shown on user registration page too.

Top announcement bar message:  If you have an urgent important announcement for your users - show it at the top of every page on a yellow bar. HTML allowed. Advanced...

Hide the 'powered by' label from the page footer and from emails

### Region

Language:  Used for UI language and calculating public holidays (for time-based reports).

Time zone:  Current UTC time is: 16:32:21  
Current time on your computer: 17:32:23 set to your local timezone...

Working hours: From  to  Optional. Used to correctly calculate "response time" etc. [add custom holidays...](#)

### Various settings

Restrict ticket deletion and marking as spam to Admins only (uncheck to allow users to delete their own tickets)

Restrict ticket closing to Technicians only (uncheck to allow users to close their own tickets)

Restrict ticket priority to Technicians only (uncheck to allow users to set ticket priority)

Everyone sees everyone's tickets (not recommended)

Disable "Assets" module

Disable avatars

Auto-assign the first replying technician as ticket-agent (recommended)

Allow assigning a ticket to multiple technicians (not recommended)

Allow users from the same company to see each other's tickets

Disable automatic 'time spent' clock on the ticket page

Default category (pre-selected on the 'new ticket' page):

Auto-close inactive tickets after (days):  If a ticket has not been answered by the SUBMITTER within this time, the ticket is closed. "0" means never.

Minimum characters required in subject & body:  When creating new tickets.

Reopen closed tickets on new replies:  Yes  No If posted within 30 days

### Knowledge base

Disable the knowledge-base

Allow unregistered users to access the Knowledge Base

Show KB suggestions hint from Jibit Bot to technicians in new tickets

KB description:  Shown above the search bar. HTML allowed



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KB homepage: Show top: 5 articles per category

Ideas forum   
Choose a custom name if you don't like the default: "Ideas forum"

**Authentication settings**

Allow unregistered users to submit tickets without logging in

Allow new users to register themselves (uncheck if you want to create all new users MANUALLY)

Allow users to edit their username and email

Disable "Remember me" (recommended for HIPAA-compliance)

Enable 'login with Google'

Shared secret for remote authentication:  Generate  
Used for automatic user sign-in. See the manual for more info about the remote authentication API.

Remote login URL:   
Optional. Redirect users to a custom login page of your site or app. Access "/User/Login?noredirect=1" in your browser to prevent the redirect for debugging purposes.

Password policy: Password has to be 8 chars long, contain a lower case letter, contain an upper case letter, contain a number

Enable SAML 2.0 single sign on

Active Directory: If you want to remotely-authenticate users via your Active Directory - download the AD-authentication integration script here, you'll find the installation instructions inside.

Save changes

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## Administration - email settings

**SYNTHESYS+ DiSSCo Helpdesk** trial expires in 17 days upgrade or extend your free trial w.vandongen@picturae.com

Tickets Knowledge base Assets Reports **Administration** New ticket

Administration » Email settings

Save changes

**Incoming mail settings**

We created an email address for you - support@disco.jitbit.com. Simply setup email-forwarding to this address. All messages sent to this mailbox will instantly create tickets..

In addition you can add your own POP/IMAP accounts below

[Edit incoming mailboxes...](#)

Helpdesk will periodically check these email addresses and generate tickets from the incoming emails

New tickets go to default category: **General Issues**

Accept emails from unregistered users. [Manage exceptions...](#)

Add all emails from CC and TO fields to ticket-subscribers

Extract the original sender from forwarded emails and create a ticket on their behalf

Auto-create companies from email-domains [Manage exceptions...](#)

PS. Also, don't forget to check our Email API

**Email notifications**

Email notifications enabled (warning: disabling this setting turns off all email functionality)

Send ticket confirmation notification (the one users get after submitting a new ticket)

Send "Ticket closed" notification

Notify all administrators of new tickets



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**Email notifications** [?](#)

Email notifications enabled (warning: disabling this setting turns off all email functionality)

Send ticket confirmation notification (the one users get after submitting a new ticket)

Send "Ticket closed" notification

Notify all administrators of new tickets

Notify technicians of new tickets in their categories (remember to edit the category permissions)

Notify ALL technicians in a category when a customer updates a ticket (not just the ticket-technician and ticket-subscribers)

Notify ALL technicians in a category when another technician TAKES a ticket

Notify ALL technicians in a category when a KB article is created or updated

Include attachments into outgoing notifications [?](#)

Send 'autologin' links in email notifications [?](#)

Send ticket updates to all subscribers in CC instead of an individual email to every subscriber (not recommended) [?](#)

---

**Outgoing email settings** [?](#)

**"From":**   
If you're using a custom "from" address and customers complain that some emails are false-detected as "spam", you might want to set SPF-records for your domain.

**"From" name:**   
Example "MyCompany Support Team". Used for all email notifications, except human replies (in this case, the "From" name will be the name of the user or technician who wrote the message).

Use "From Name" for ALL outgoing notifications  
When checked, all outgoing email notifications will have "DISCO Support Team".

**"Reply-to":**   
It is recommended to set the 'Reply-To' address to one of email addresses that is being checked by Helpdesk (see "incoming mail settings" above).

**SMTP server settings:**

**SMTP server settings:**

Use Jitbit's SMTP server

SMTP server address:

SMTP server port:  (25, 465, 587 etc.)

SMTP server requires authentication

SMTP username:

SMTP password:

Use SSL/TLS to connect to the SMTP server

---

**Email Templates** [?](#) (leave a template empty to skip sending that message)

**"New ticket" email template**  
Sent to technicians when a new ticket arrives. All technicians that have permissions to the category get one of these.

Subject  
RE: #Subject#

Body:  
  
  
[#URL#](#)  
NOTE: When replying to this email please leave the subject-line intact.

**"Ticket-updated" email template**  
Sent to both technicians and ticket-submitter (and all ticket-subscribers if any) when a new reply is added to the ticket

Subject  
RE: #Subject#

Body:  
  
[#URL#](#)  
  
  
#Category# | #Status# | #Priority# priority  
NOTE: When replying to this email please leave the subject-line intact.



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#URL#

#Recent\_messages#

#Body#  
#Category# | #Status# | #Priority# priority  
NOTE: When replying to this email please leave the subject line intact.

#Suggested\_KB\_articles#

#Body#  
#URL#  
NOTE: When replying to this email please leave the subject line intact.

"Welcome to Helpdesk" email template  
Sent to new users when they register a new account.  
Subject:  
Welcome to Helpdesk!  
Body:  
Welcome to Helpdesk!  
Your username: #username#  
Your password: #password#  
Login here: #URL#

Reset to default

Save changes

Get help for this page

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## Administration - user management

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Tickets Knowledge base Assets Reports Administration

+ New ticket search... (or ticket ID)

Administration > Users, companies and permissions

Add user... Search... CSV Companies... Departments... Custom fields...

All Regular users Technicians Admins Deactivated users \*is manager\* Quick search

USERNAME	FIRST NAME	LAST NAME	COMPANY	LAST SEEN	DEACTIVATED
Laura Tilley laura.tilley@cetaf.org	Laura	Tilley			<input checked="" type="checkbox"/>
w.vandongen@picturae.com w.vandongen@picturae.com	Wim	van Dongen		1/30/2021 11:26:00 AM	<input checked="" type="checkbox"/>
wouter.addink@naturalis.nl wouter.addink@naturalis.nl	Wouter	Addink		1/28/2021 9:53:00 AM	<input checked="" type="checkbox"/>

Total: 3

Get help for this page

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## Administration – ticket categories management

The screenshot shows the 'Administration' section of the DiSSCo Helpdesk, specifically 'Ticket categories and permissions'. The interface includes a navigation bar with 'Tickets', 'Knowledge base', 'Assets', 'Reports', and 'Administration'. A 'New ticket' button and a search bar are also visible. The main content area features a table of ticket categories:

TICKET CATEGORIES	ACCESS TYPE
General Issues	Everyone [up/down] [refresh] [delete]
Technical	[up/down] [delete]
Bug reports	Everyone [up/down] [refresh] [delete]
Feature requests	Everyone [up/down] [refresh] [delete]

Below the table, a note states: 'Click on a category to edit its properties. Reorder by dragging and dropping. Optionally, categories can be organized into Sections. Sections are just "folders" that contain categories.'

At the bottom, there is a 'Get help for this page' link and a 'Powered by Jitbit HelpDesk' logo.

## Administration – custom fields management

The screenshot shows the 'Administration' section of the DiSSCo Helpdesk, specifically 'Custom fields'. The interface includes a navigation bar with 'Tickets', 'Knowledge base', 'Assets', 'Reports', and 'Administration'. A 'New ticket' button and a search bar are also visible. The main content area features a 'Create' button and a text input field. Below the input field, a note states: 'Custom Fields are additional properties you want your tickets to have. For example, you might want to add a field named "Computer model" to your tickets, so the user fills this field when submitting a new ticket. You can reorder the fields using drag and drop.'

Below the note, there is a 'Create' button and a text input field. Below the input field, a note states: 'You can also set up custom fields for Users, for Companies and for Assets'

At the bottom, there is a 'Get help for this page' link and a 'Powered by Jitbit HelpDesk' logo.



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## Administration – custom statuses management

The screenshot shows the 'Administration' section of the DiSSCo Helpdesk interface, specifically the 'Custom statuses' management page. The header includes the SYNTHESYS+ logo, the title 'DiSSCo Helpdesk', and navigation links for Tickets, Knowledge base, Assets, Reports, and Administration. A 'New ticket' button and a search bar are also visible. The main content area features a 'Create' button and a brief explanation: 'You can add "Custom Statuses" to your tickets, in addition to the default ones, which are "New", "In progress" and "Resolved". Every custom status has a name and a text-caption, used for the button, that moves a ticket to this status. For example: you can add a custom status named "On hold", with a "Put on hold" button.' A 'Get help for this page' link is at the bottom left, and 'Powered by Jitbit HelpDesk' is at the bottom right.

## Administration – canned responses management

The screenshot shows the 'Administration' section of the DiSSCo Helpdesk interface, specifically the 'Canned responses' management page. The header is identical to the previous screenshot. The main content area features a 'quick find' search bar and a list of two canned responses: 'Hope that helped' and 'Looking into this', each with a checkmark icon. An 'Add new...' button is located below the list. A 'Get help for this page' link is at the bottom left, and 'Powered by Jitbit HelpDesk' is at the bottom right.



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# Administration - reports

The screenshot displays the 'Administration - Reports' section of the SYNTHESYS+ DiSSCo Helpdesk. The interface features a dark blue header with the logo and navigation tabs for Tickets, Knowledge base, Assets, Reports, and Administration. A search bar and a '+ New ticket' button are also visible. The main content area is a grid of report options:

- Summary**: Build a ticket report by date range, category, status and export to Excel.
- Tickets per day**: Tickets per day.
- Custom reports**: Build a custom report (billing, grouping etc.).
- Response speed**: Average response and resolution speed.
- User Statistics**: Tickets created by a user within a date range.
- Companies statistics**: Tickets grouped by companies.
- Audit Log**: Contains entries of various actions and events like deleting tickets, categories, custom fields, users, companies, etc.
- Scheduled Tickets**: A list of all tickets that are scheduled for repetition.
- Due dates calendar**: Upcoming due tickets showed in a calendar.
- Technician Statistics**: Tickets handled by a user within a date range.
- Knowledge base**: Knowledge base Reports.
- Customer satisfaction**: Satisfaction rating summary.
- Real-time dashboard**: Real-time dashboard.
- Deleted tickets**: Trash bin - recently deleted tickets.



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