

TARGETPROCESS HELP DESK PORTAL



v.2.17

User Guide

This document describes TargetProcess Help Desk Portal functionality and provides information about TargetProcess Help Desk Portal usage.

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Help Desk Portal

Help Desk Portal is a separate application written on ASP.NET 2.0. It may be installed on any server and interacts with TargetProcess via Web Services API.

Help Desk Portal provided with source code and you may customize it as required.

Help Desk Portal provides the following functionality to end users:

- Post requests/ideas/issues
- Votes for requests
- View requests with statuses
- Discuss requests via comments threads
- Attach files to requests
- View related bugs and user stories

Help Desk Portal Setup

You may freely download Help Desk Portal from <http://targetprocess.com/Product/Download.aspx> and follow Installation Guide.

Help Desk Portal Modes

There are 2 modes for Help Desk Portal that defines requests visibility and people access:

- **Private:** Customer will see only his own requests.
- **Global:** Customer will see all requests posted by people from his company and all public requests if company is not defined. **This mode is useful for service development companies and product development companies.**

Authentication

Only registered users (Requesters) may login to Help Desk Portal. If anonymous access is enabled, then users may register with request post. If it is disabled, it is required to create Requester in TargetProcess application.

Go to [Admin](#) -> [General Settings](#) and find Help Desk section. There are two options:

- When you add requester manually TargetProcess may send notification to requester with access parameters to Help Desk Portal.
- When requester added into TargetProcess automatically (from retrieved email for example), TargetProcess may send notification as well.

It is required to enable email notifications and the first option if you want to allow manually added requesters to post requests via Help Desk Portal.

Help Desk Portal

Help Desk Portal is separate web based application that can communicate with TargetProcess. It allows your customers or end users to post requests and ideas, view requests with statuses, discuss requests via comments threads.

Help Desk Portal URL (Ex: <http://helpdesk.yourdomain.com>)

- Email access parameters to new requesters
When new requester added into database or his/her password changed, he/she will receive email notification with access information to Help Desk Portal.
- Email access parameters to requesters automatically created from inbound mail
When new requester automatically added into database from inbound mail he/she will receive email notification with access information to Help Desk Portal.

Registration

Requests may be added by registered users. User should click Register link and fill out registration form.

If Help Desk Portal configured in Private or Global mode, requesters may login right after the registration.

Add Request








It is required to select exact **product** when adding new request.

You may mark Program or Project as a product. Go to [Projects](#) list, click [Edit](#) for required project, find Product checkbox, mark it and [Save](#) changes.

Add Request

Title (required)

Description

B *I* U
 
 
 
 
 
 
 
 |
 -- Format --

Is Urgent?

Is Private?

It is required to select a project for request

Request Type

Product (required)

Requests Lists

Help Desk Portal users may see all submitted requests in My Requests area and All Requests in All Requests area. It is possible to sort requests, edit them and view details.

All Requests area contains different requests based on Help Desk Portal Mode:

- Private: There is no All Requests list at all in this mode
- Global: The list contains all requests posted by users from the same company as logged user or all other requests if user has no company

TargetProcess Help Desk Vote for requests [Sort requests](#) mike@targetprocess.com [Logout](#)

Home My Requests All Requests **Add Request**

Name	Priority	Status	Added	Type	Assignments
1 votes Custom Queries/Filters/Views The above brings us to the next blocking problem: For a certain iteration, we have planned and assigned a number of user stories and a number of bugfixes. Since we as...	Normal	New	14 minutes ago	Issue	
4 votes Ability to View a Task detail from the Task Board Currently when using the task board you can Edit the Task itself as one of the possible actions. However in some cases all you want to do is click through the the detail view of the task.	Normal	New	22 hours ago	Issue	
1 votes Show Bugs on task board We would like to have bugs on the task board filtered with a checkbox "Bugs" like in Iteration Plan view.	Urgent	New	22 hours ago	Idea	

See request state 1 - 3 of 3

Votes

You may vote for requests. Each vote is a person who requested the feature. For example, if request has 4 votes it means that 4 customers or leads requested this feature.

When you add your vote, the request becomes visible in My Requests list.

Search

It is possible to search for requests by name and description fields. Type required word or phrase into the search box on the top and push button.

Request Details

Navigate to and click on request name link. Request view area shows all related information. User may add comments and attachments.

Target Process Help Desk

[My Requests](#)[Add Request](#)

#131. Ability to add task(s) via API

user stories created from request

[General](#)[Related Entities](#)

Add task to a project based on API, assign to particular developer that is assigned to the project, need to have abilities to retrieve what developers are available.

Additional Info

State Active

Request Type Idea

Source Email

Assignments

Owner Administrator
AdministratorLast Editor Administrator
Administrator

Creation Date 01-Jul-07

Completion
Date

Attachments

[HelpDeskSchema.gif](#) posted 01-Jul-2007 21:55 by Tom Cat[Bug Tracking Specs.doc](#) posted 01-Jul-2007 21:56 by Tom Cat[Attach a file](#)

attachments

Comments [[add](#)]

Hmm, it seems nobody replied on this request.
Comment #2 posted by Tom Cat at 01-Jul-2007 21:56 | [Reply](#) | [Edit](#)

We've checked the request and it will be implemented in next release.
See user story created
Comment #3 posted by Administrator Administrator at 01-Jul-2007 21:58 | [Reply](#)

discussion