



ServiceDesk Plugin for Redmine

Workspace overview of the available functions

<https://alphanodes.com/redmine-servicedesk>



Helpdesk information

| Issues | open | Total |
|--------------------------------|------|-------|
| Helpdesk tickets | 150 | 1211 |
| Ticket source: Email | 43 | 1076 |
| Ticket source: Web | 107 | 135 |
| Tickets with contact relations | 6 | 8 |

| Contacts | |
|-------------------------------|------|
| Contact with helpdesk tickets | 522 |
| Contacts | 1233 |

Project overview

- **Dashboard:** The project overview dashboard contains general information on your project. If you activate the „Helpdesk“-function in this project, you can add the **Helpdesk information** dashboard block (dashboard permissions required) in order to view project specific helpdesk-tickets, contacts, reports.

Helpdesk-Ticket

A Helpdesk-Ticket looks like a normal issue in Redmine, but it is connected to a Helpdesk contact (From). And the *reply* note is sent via email to the contact.

Task #32855 [CLOSED] [HELPDESK]

Support request
Added by [redacted] about 2 years ago. Updated about 2 years ago.

From Susi Sonnenschein <susi@alphanodes.com> 18.08.2022, 10:15

Status: Erledigt Start date: 18.08.2022
Priority: Normal Due date:
Assignee: - % Done: 0%
Category: - Estimated time:
Target version: -
Projektbezug: -
Round trips: 0 Issue life time: 25 days
Time to reaction: 25 days

Tags:

Description
Dear Team...

Subtasks: Add
Related issues: Add

Helpdesk contact: Susi Sonnenschein, AlphaNodes GmbH, Grünwald, 089 - 32168, susi@alphanodes.com

Create new entries

If *Project menu* tab for creating new objects is active you can create new entries for *ServiceDesk* entities (contact, invoice, canned response)

- New issue
- New category
- New version
- New contact
- New invoice
- New canned response

Helpdesk-Tickets (Issues)

Helpdesk-Tickets are listed in the regular **Issues** area. The difference between Helpdesk-Tickets and regular issues is the assignment of a contact.

ServiceDesk Plugin functions

- **Contacts:** Contact list
- **Invoices:** Invoice list
- **Canned responses:** List of canned responses
- **Settings:** Adjust project related ServiceDesk settings and manage ignore list

New issue

Helpdesk contact: Susi Sonnenschein (AlphaNodes GmbH) Ticket source: Email

Ticket date: 18.08.2022 10:15 Send as: (Not send)

Project: Helpdesk Author: Edit Private

Tracker: Task Subject:

Description: [Rich text editor]

New issue

Create new Helpdesk-Tickets manually by selecting the specified tracker. Otherwise it is just a regular issue.

Helpdesk-Tickets

Live-Search, Filters & options for searching helpdesk-tickets in the issue list

Ticket results

Displayed as „Table“ view

Contains Ticket information and links to existing entries

Issues

Filters: Helpdesk contact: any

| # | Tracker | Status | Priority | Subject | Updated | Tags |
|-------|----------|----------------|----------|---------|---------|--------------|
| 32850 | Task | In Bearbeitung | Normal | | | |
| 32849 | Task | In Bearbeitung | Normal | | | |
| 32848 | Task | In Bearbeitung | Normal | | | Consulting 1 |
| 32847 | Task | In Bearbeitung | Normal | | | |
| 32846 | Task | In Bearbeitung | Normal | | | |
| 32800 | Helpdesk | Neu | Normal | | | |
| 32799 | Helpdesk | Neu | Normal | | | |
| 32798 | Helpdesk | Neu | Normal | | | |
| 32797 | Helpdesk | Neu | Normal | | | |
| 32796 | Helpdesk | Neu | Normal | | | |
| 32795 | Helpdesk | Neu | Normal | | | |
| 32794 | Helpdesk | Neu | Normal | | | |

Tags sidebar: Additional 3, Adressänderung 1, Agile 2, API 1, Auftragserteilung 1, Automation 13, Bestellung 4, Bewerbung 1, Budget 7, Consulting 1

Sidebar

Contains Tags for Issues and Helpdesk-Tickets as well as Custom queries



Contact entry

The detailed contact view gives you insights into the stored data.

Contact #1224

Susi Sonnenschein
AlphaNodes GmbH

089 - 32168
susi@alphanodes.com

Added by [User] over 6 years ago. Updated over 1 year ago.

History Helpdesk tickets (4)

Contact vCard

Primary address: Bavariafilmplatz 3
82031 Grünwald
Germany

Other address: Private street 3
82031 Grünwald
Germany

Website: alphanodes.com

Description

New contact

A contact can be a person or a company. It might be visible for the project, for all projects or the creator (private)

New contact

Company Spam

First name *

Middle Name

Last name

Company

Birthday TT . MM . JJJJ

Job title

Avatar Keine Datei... ausgewählt.

Phone

Multiple values allowed (comma separated).

Email

Multiple values allowed (comma separated).

Website

Assignee

Visibility

The "Private" selection is only possible for your own Contacts.

Primary address

Street 1

Street 2

City

State/Region

Zip

Other address

Street 1

Street 2

City

State/Region

Zip

Description

Edit Preview B I U C H1 H2 H3

Create new entries

If *Project menu tab* for creating new objects is active you can create new entries for ServiceDesk entities (contact, invoice, canned response)

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- New version
- New contact
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- New canned response

ServiceDesk Plugin functions:

- **Contacts:** Contact list
- **Invoices:** Invoice list
- **Canned responses:** List of canned responses
- **Settings:** Adjust project related ServiceDesk settings and manage ignore list

New contact: Create new entries manually

Import: Import via CSV

Contacts
Live-Search,
Filters & options

Contact results
Displayed as „Card“ view

Contains contact information and links to existing contact entries

Overview Activity Issues **Contacts** Invoices Canned responses Settings

Contacts

Filters

Add filter

Options

Apply Clear Save

Tags: Kunde Redmine HRM Redmine Reporting

Tags: Kunde Redmine HRM Redmine Reporting

Tags: eBook

Tags: eBook

Tags: Kunde Redmine HRM Redmine Reporting

Tags: Kunde Redmine HRM Redmine Reporting

Tags: eBook

Tags: eBook

Tags: eBook

Tags: eBook

Tags: eBook

Tags

A

- Additional 2
- Affiliate Partner 1
- Anfrage 19
- Ansible 1
- Automation 1

B

- Bewerbung 3
- Bot 3

C

- Consulting 9

D

- DevOps 1
- Dienst 1
- Domain 2
- Drupal 99
- Drupal-Anfrage 34
- Drupal-Com 19
- DSGVO 1

E

- eBook 45

G

- GitHub 1
- Gitlab Anfrage 5

H

- Hosting 12

J

Sidebar
Contains Tags for
Contacts as well
as Custom
queries

ServiceDesk working space (Project related)



Create new entries

If *Project* menu tab for creating new objects is active you can create new entries for ServiceDesk entities (contact, invoice, canned response)

- New issue
- New category
- New version
- New contact
- New invoice
- New canned response

ServiceDesk Plugin functions:

- Contacts:** Contact list
- Invoices:** Invoice list
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New invoice

Invoice ID: R 2022 2449
 Subject:
 Project: Helpdesk
 Status: Draft
 Client:
 Assignee:
 Tags:

Order number:
 Issue date: 18. 08. 2022
 Due date: TT. MM. JJJJ
 Discount:
 Currency: EUR (€)
 Language: (auto)

Description:

Recurring invoice:

| Description | Qty | Units | Unit price | Tax | Total |
|----------------------|-----|----------------------|------------|--------|-------|
| <input type="text"/> | 1.0 | <input type="text"/> | 0.0 | 19.0 % | 0.00 |
| | | | | | 0.00 |

Files: No files selected. (Maximum size: 24.9 MB)

New invoice: Create new entries manually

Invoices
Live-Search,
Filters & options

Invoice results
Displayed as „Table“ view

Contains invoice
information and links to
existing invoice entries

Overview Activity Issues Contacts **Invoices** Canned responses Settings

Invoices

Filters: Status open

Options:

| # | Project | Invoice ID | Issue date | Client | Amount |
|-------------------------------|----------|-------------|------------|--------|----------------------|
| <input type="checkbox"/> 2434 | Helpdesk | R 2022 2434 | 08/08/2022 | | €236,81 |
| <input type="checkbox"/> 2448 | Helpdesk | R 2022 2448 | 08/01/2022 | | €35,70 |
| <input type="checkbox"/> 2447 | Helpdesk | R 2022 2447 | 07/04/2022 | | €367,71 |
| <input type="checkbox"/> 2445 | Helpdesk | R 2022 2445 | 06/01/2022 | | €296,31 |
| <input type="checkbox"/> 2446 | Helpdesk | R 2022 2446 | 04/02/2022 | | €236,81 |
| | | Due amount: | €877,03 | Paid: | Total (5): €1.173,34 |

(1-5/5)

ServiceDesk working space (Project related)

Sidebar
Contains relevant
numbers invoice
status and
Custom queries

Export invoice list: Invoice list information
is exportable into CSV, XLSX

INVOICES



Create new entries

If *Project menu tab for creating new objects* is active you can create new entries for ServiceDesk entities (contact, invoice, canned response)

- + New issue
- New category
- New version
- New contact
- New invoice
- New canned response

ServiceDesk Plugin functions:

- **Contacts:** Contact list
- **Invoices:** Invoice list
- **Canned responses:** List of canned responses
- **Settings:** Adjust project related ServiceDesk settings and manage ignore list

New canned response: Create new entries manually

Canned responses Live-Search, Filters & options

| # | Name | Type of response | Updated |
|---|------|---------------------------------|---------|
| | | Helpdesk ticket canned response | ... |
| | | General canned response | ... |
| | | General canned response | ... |
| | | General canned response | ... |
| | | General canned response | ... |
| | | Helpdesk ticket canned response | ... |
| | | General canned response | ... |
| | | General canned response | ... |
| | | General canned response | ... |
| | | General canned response | ... |
| | | General canned response | ... |
| | | General canned response | ... |
| | | General canned response | ... |
| | | General canned response | ... |
| | | General canned response | ... |
| | | General canned response | ... |
| | | General canned response | ... |
| | | General canned response | ... |
| | | General canned response | ... |
| | | General canned response | ... |
| | | Helpdesk ticket canned response | ... |
| | | General canned response | ... |
| | | General canned response | ... |
| | | General canned response | ... |
| | | General canned response | ... |

Canned responses results. Displayed as „Table“ view

Contains canned responses information and links to existing entries

Sidebar Contains Tags and Custom queries

ServiceDesk working space (Project related)

Cross-project canned response list: If cross-project templates exist, you can view the list to those canned responses via this link.

Export canned response list: Canned response list information is exportable into CSV, XLSX

RESPONSES CANNED



Create new entry for ignore list manually
Choose the type of entry (email or subject) you want to create.

New entry

Value *

Type * Email

Create new entries
If *Project menu tab for creating new objects* is active you can create new entries for *ServiceDesk* entities (contact, invoice, canned response)

- +
- New issue
- New category
- New version
- New contact
- New invoice
- New canned response

- ServiceDesk Plugin functions:**
- **Contacts:** Contact list
 - **Invoices:** Invoice list
 - **Canned responses:** List of canned responses
 - **Settings:** Adjust project related ServiceDesk settings and manage ignore list

Ignore list entries
Create new entries, Check if an entry would be ignores, Filter the list for entries

Ignore list entries
Displayed as „Table“ view of the added entries.

Users with appropriate Permission can manage the entries in this area (edit or delete).

Overview Activity Issues Contacts Invoices Canned responses **Settings**

Project Members Issue tracking Versions Issue categories SLA Invoices Helpdesk **Ignore list** Helpdesk templates

Filters

Type: all Value:

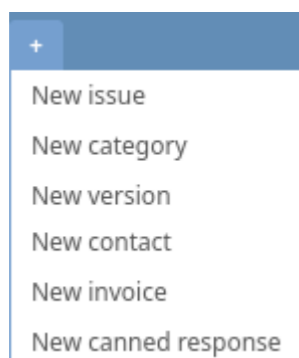
| Value | Type | Updated | |
|------------|-------|---------------------|---|
| [Redacted] | Email | 05/21/2022 04:24 PM | <input type="button" value="Edit"/> <input type="button" value="Delete"/> |
| [Redacted] | Email | 05/18/2022 11:51 AM | <input type="button" value="Edit"/> <input type="button" value="Delete"/> |
| [Redacted] | Email | 06/01/2022 06:22 PM | <input type="button" value="Edit"/> <input type="button" value="Delete"/> |

(1-3/3)

ServiceDesk working space (Project related)



Create new entries
If *Project* menu tab for creating new objects is active you can create new entries for *ServiceDesk* entities (contact, invoice, canned response)



ServiceDesk Plugin functions:

- **Contacts:** Contact list
- **Invoices:** Invoice list
- **Canned responses:** List of canned responses
- **Settings:** Adjust project related ServiceDesk settings and manage ignore list

Helpdesk settings
If function is activated the helpdesk configuration for the project takes place here, if the project is used for managing helpdesk tickets.

Incoming mail server
If you want to connect an existing email account with your project you need to configure the account in this section. Afterwards you are able to import emails sent to this configured email as helpdesk-tickets.
→ Learn more on page 9 for Microsoft Outlook as Incoing Mail Server.

What should happen with incoming Helpdesk-tickets? Take care of the respective configuration here in the areas:

- General
- New tickets
- Helpdesk tickets
- Contacts

ServiceDesk working space (Project related)

Issue collector
If you want to import incoming requests via webform you can connect a HTML5 webform on your website with your Redmine project, where the Helpdesk function is activated. In this case activate this option and create a webform, that needs to be connected with your project.



Dashboard permissions

Users with appropriate permission on „Dashboards“ can create and edit dashboards and add so called „Dashboard blocks“ like the *Helpdesk Information* block

- Project
 - Create project
 - Close / reopen the project
 - Select project modules
 - Manage versions
 - Manage public queries
 - Show hidden roles
 - Share dashboards
 - View file list
 - View budget
 - View latest logins
- Edit project
 - Delete the project
 - Manage members
 - Create subprojects
 - Save queries
 - Set system dashboards
 - Save dashboards
 - View Log
 - View project TAGs

New dashboard

Name *

Description

Visible to me only to any users to these roles only:

- Manager
- Sales
- Team
- Product Owner
- Product Customer

Enable sidebar

System default

Create

Dashboard menu

Users with appropriate permission can:

- create new dashboards
- Edit dashboards
- Delete dashboards

Moreover it is possible to:

- Enable sidebar
- Switch between different dashboards

- New dashboard
- Edit dashboard
- Delete dashboard
- Enable sidebar
- Dashboard: Admin Insights
- Dashboard: Manager Board

Overview Activity Issues Contacts Invoices Canned responses Settings

Overview Unwatch << Add block >>

Helpdesk information

Issues

| | open | Total |
|--------------------------------|------|-------|
| Helpdesk tickets | 150 | 1211 |
| Ticket source: Email | 43 | 1076 |
| Ticket source: Web | 107 | 135 |
| Tickets with contact relations | 6 | 8 |

Contacts

| | |
|-------------------------------|------|
| Contact with helpdesk tickets | 522 |
| Contacts | 1233 |

ServiceDesk working space (Project related)



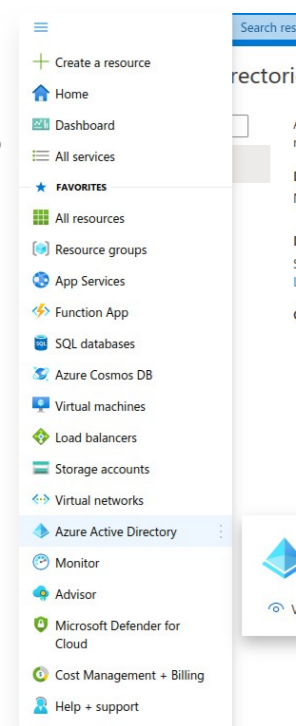
No. 1: Within Redmine (Plugin configuration)

- OAuth settings activation necessary

ServiceDesk plugin configuration

No. 2: Navigate to your Azure Portal (<https://portal.azure.com>)

- Select *Azure Active Directory*
- Choose *App registration > New registration*



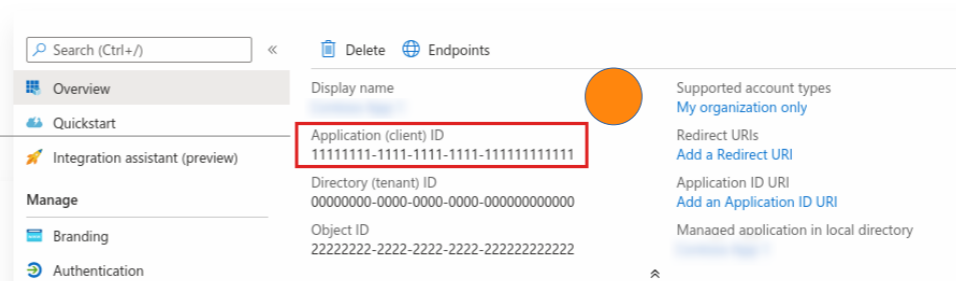
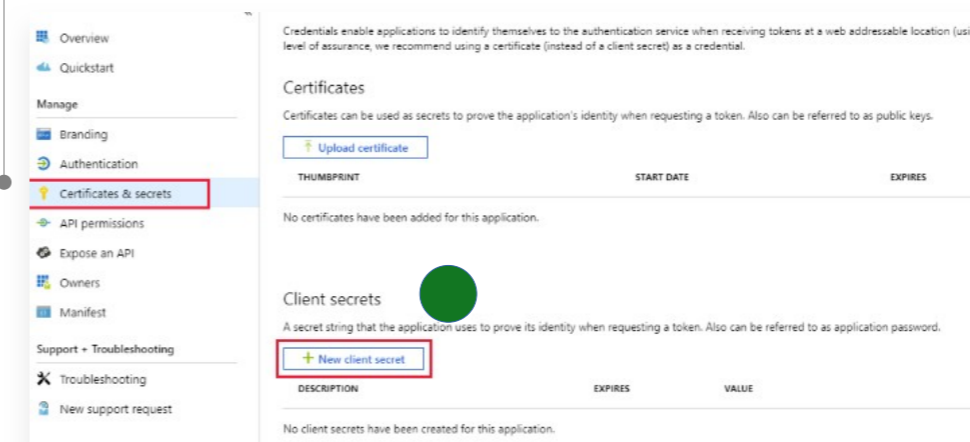
No. 3: Register Redmine as new web application & get Application (client) ID

- Enter a display Name for your application.
- Specify who can use the application → Select the option: *Accounts in any organizational directory and personal Microsoft accounts*
- *for Redirect URI (optional) copy & paste the field from Redmine*
- When registration finishes, the Azure portal displays the app registration's *Overview* pane. You see the **Application (client) ID**.

Register an application

No. 4: Add a Client Secret

- Navigate to the Azure portal → **App registrations**, select your Redmine application
- Select **Certificates & secrets > Client secrets > New client secret**
- Add a description for your client secret
- Select an expiration for the secret
- Choose **Add**.
- Record the secret's value for use in your Redmine application.





Settings

Project Members Issue tracking Versions Issue categories **Helpdesk** Ignore list Helpdesk templates

Administration

General

From address
Available variables: {%response.author%}, {%response.author.first_name%}

CC address

BCC address

New tickets

Tracker

Author << Anonymous (Default) >>

This setting is valid for incoming helpdesk request (via mail / form). There is an exception for incoming mails: if the sender e-mail matches the e-mail address of a user, the user becomes the author.

Assignee

Ticket assignment rule

Helpdesk tickets

Ticket status on reply

Reopened tickets status

Issue life time days

Contacts

Allow contacts only

Tag new contacts

Incoming mail server

Protocol

User name

Authorization **authorize**
It is required that the login credentials with access to the specified email address, are submitted.

Retrieve mails

Incoming Helpdesk Form (Issue collector)

Active

Outgoing mail server

Protocol

For the mail dispatch of the helpdesk ticket responses the same dispatch is used as defined for Redmine (e.g. for notifications). Recommended by us.

ServiceDesk project setting

No. 1: Configure Incoming Mail Server

- Choose protocol: *Microsoft Outlook*
- Enter your Microsoft mail as *User name*
- **Save your changes, first!**

No. 2: Authorization

- Click **authorize** and confirm the specified mail account you entered in your helpdesk project


No. 3: Done

- After successful authorization you can start working and retrieving mails.

Incoming mail server

Protocol

User name

Authorization 

Retrieve mails


Microsoft

Permissions requested

Redmine Helpdesk Mails
unverified

This application is not published by Microsoft.

This app would like to:

- ✓ Maintain access to data you have given it access to
- ✓ Read and write access to user mail
- ✓ Send mail as a user
- ✓ Read and write user and shared mail
- ✓ Send mail on behalf of others
- ✓ View users' basic profile
- Consent on behalf of your organization 

If you accept, this app will get access to the specified resources for all users in your organization. No one else will be prompted to review these permissions.

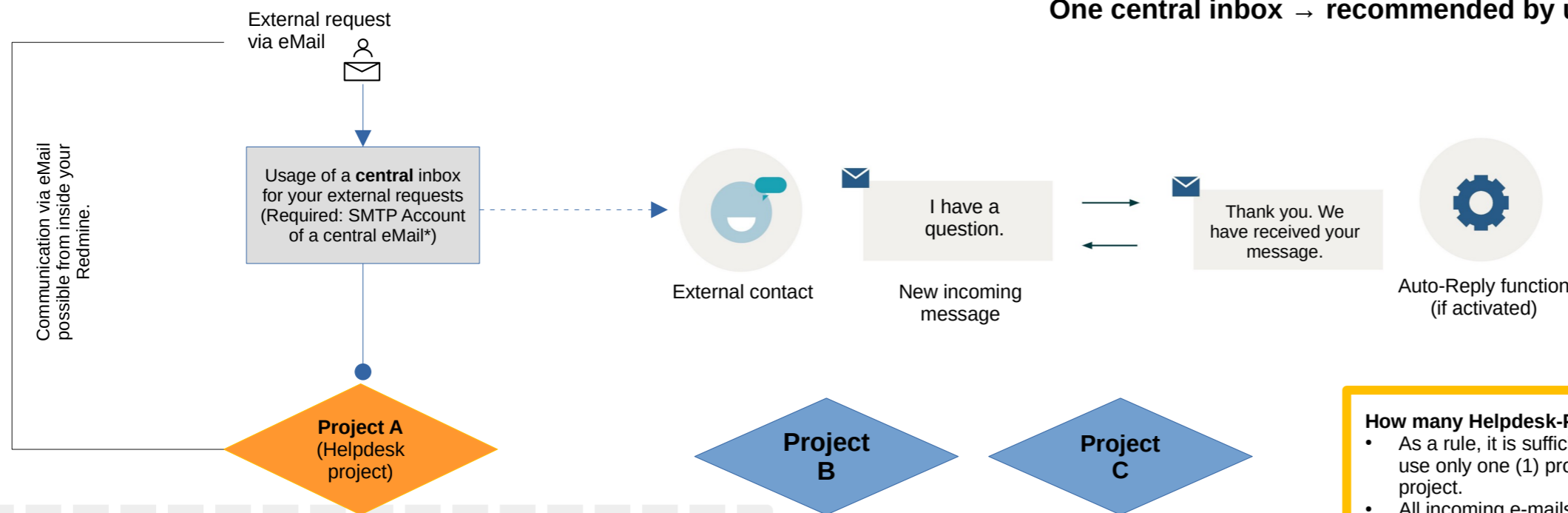
Accepting these permissions means that you allow this app to use your data as specified in their terms of service and privacy statement. **The publisher has not provided links to their terms for you to review.** You can change these permissions at <https://myapps.microsoft.com>. [Show details](#)

Does this app look suspicious? [Report it here](#)

This configuration requires Step 1, otherwise the authorization and / or mail fetching will fail!



Helpdesk project configuration workflow example One central inbox → recommended by us



- Function is activated & configured in a project of your choice.
- Afterwards incoming eMails are converted into Helpdesk tickets
- New contact entries will be created.

Further processing of Helpdesk-tickets in Redmine according to your workflow

Support Team

- Helpdesk-tickets are directly managed or
- Moved to another project **manually** after taking a look at it

Helpdesk Information

| Tickets | offen | Gesamtzahl |
|--------------------------------|-------|------------|
| Helpdesk-Tickets | 7 | 1957 |
| Ticketquelle: E-Mail | 6 | 1774 |
| Ticketquelle: Web | 1 | 183 |
| Tickets mit Kontaktbeziehungen | 0 | 7 |

| Kontakte | |
|------------------------------|------|
| Kontakte zu Helpdesk-Tickets | 848 |
| Kontakte | 1593 |

Berichte

- Erste-Antwort-Zeit
- Aktivste Zeit des Tages
- Kundenzufriedenheit

Helpdesk evaluations can be called up on a project-related basis for users with the corresponding role permission.
→ Dashboard block: *Helpdesk Information*

Automation

- Own rules move Helpdesk-tickets **automatically** to another project based on the rule conditions for further processing

| Trigger |
|---|
| <ul style="list-style-type: none"> • Save-Event (i.g. Event – Save issue) • Scheduled |
| Condition (if) |
| <ul style="list-style-type: none"> • Usage of the regular Issue filters of the Issue list • Provides additional filters for Helpdesk-tickets and contacts. |
| Action (then) |
| <ul style="list-style-type: none"> • Various actions possible. For example: <ul style="list-style-type: none"> • Other project • Other assignee • Other priority, etc. |

Configuration takes place in the Automation plugin. Area: Own rules (/settings/plugin/redmine_automation?tab=rules)

Note: Only accessible for administrators

How many Helpdesk-Projects?

- As a rule, it is sufficient to configure / use only one (1) project as a helpdesk project.
- All incoming e-mails are imported there as Helpdesk-tickets for further processing.
- From there, they can be moved manually and / or automatically to the other projects.

How is communication working with external contacts?

- If you want to continue communicating with external contacts via the helpdesk ticket in the other projects, it is necessary:
 - activate at least the Helpdesk and Contacts modules.
 - Allow the necessary contacts for the other projects as well (reduces duplicates).
 - Configure the mail dispatch in this project (the central mail reception still takes place via the helpdesk project).

What, if more e-Mails should be used?

- Only one e-mail account can be configured per project. This cannot be used for other projects at the same time.
- If you want to use several e-mail accounts, you must configure a separate project for each one.



Helpdesk project (Receiving & sending emails with external contacts)

Regular project / sub-project (Sending emails with external contacts possible if required)

Note: An e-mail address can only be used for one project (not for several)

* To ensure that all e-mails are imported, the e-mail account used may only be used / accessed via the Redmine Helpdesk project. → Not anywhere else!