

User MANUAL

of

**Information Technology Division
(IT Ticketing Module)
of Saksham ERP System**

	User Manual CSM Technologies	Document #: CSM/QT/01/01	Rev.: 1.0 Page #:2 of 17
	NAFED		

Revision History

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User Manual of Information Technology (IT Ticketing Module)			
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1 About the Project

The NAFED ERP project aims to modernize and streamline internal and operational processes by replacing multiple standalone systems with a single, integrated ERP platform. The solution enables centralized data management, real-time reporting, and seamless coordination across departments such as procurement, inventory, finance, supply chain, and human resources.

By implementing this ERP system, NAFED can improve operational efficiency, reduce data redundancy, enhance transparency, and support informed decision-making through advanced analytics and reporting. The solution is scalable and designed to accommodate future organizational growth.

2 Module Overview

The Information Technology (IT Ticketing Module) is designed to automate and centralize NAFED's IT service management and support processes. It provides a streamlined, system-driven platform for raising service requests, tracking ticket status, managing IT support activities, and generating service ticket reports. The module replaces manual request handling with a centralized ticketing system, enabling efficient issue resolution, improved service delivery, enhanced transparency, and better monitoring of IT support operations across the organization.

3 How To Get Started

To get started with the application, the user needs to enter the website URL (<https://saksham.nafed-india.com>) in the browser and navigate to the Login page.

Key Functions of IT Ticketing Module-

- Service Ticket Management:** Raise IT service requests, assign unique ticket IDs, categorize requests, prioritize issues, and track ticket status from creation to closure.
- Ticket Tracking & Resolution:** Monitor ticket progress in real time, assign tickets to support personnel, update ticket status, maintain resolution history, and ensure timely issue resolution.
- Compliance & Audit Trail:** Maintain complete audit logs of ticket activities, user actions, status changes, and resolution history to ensure accountability and compliance with organizational policies.

4 Employee- Activities

4.1 Raise a New IT Service Ticket

To Raise New IT Ticket

- Employee Login into the Saksham ERP System.

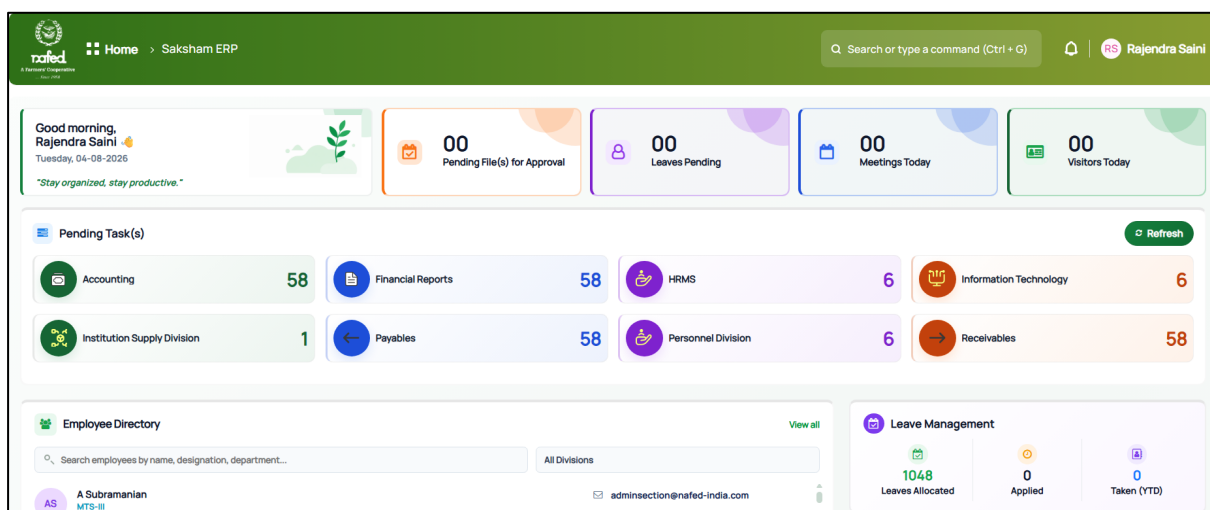


Figure 6-1 Employee Dashboard

- Click on the Home button. From the list of available divisions, select the Information Technology Division to access the Information Technology Dashboard.

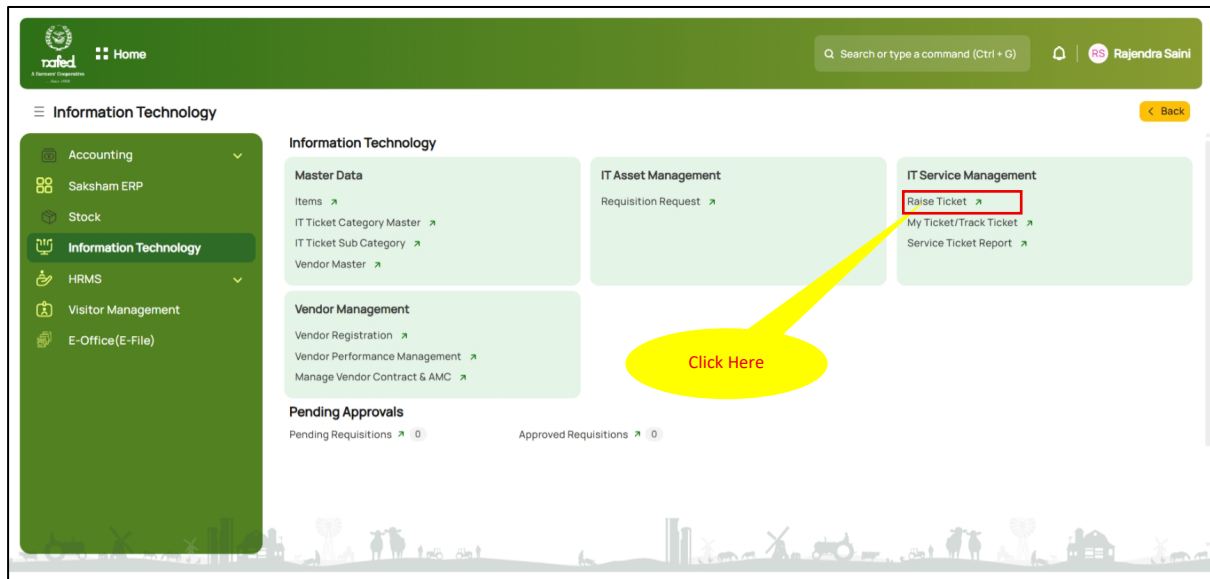


Figure 6-2- Raise Ticket

- Under the **IT Service Management** click on the **Raise Ticket**.

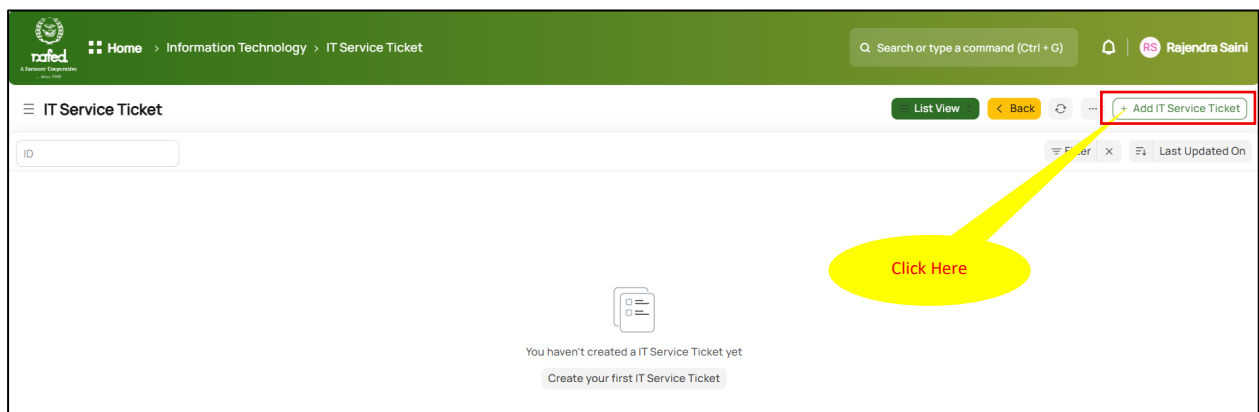
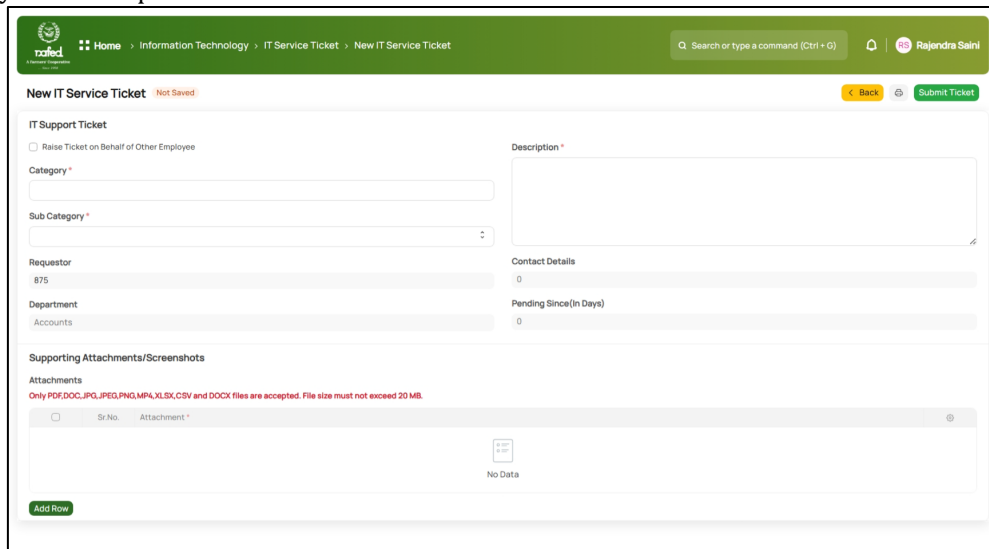


Figure 6-3 IT Service Ticket Page

- The system will open the **IT Service Ticket** page.
- Click the **+ Add IT Service Ticket** button located at the top-right corner of the screen.
- The system will open the **New IT Service Ticket Form**.



The screenshot shows the 'New IT Service Ticket' form. The form has a title bar with 'Home > Information Technology > IT Service Ticket > New IT Service Ticket'. The form fields include:

- IT Support Ticket**: A checkbox for 'Raise Ticket on Behalf of Other Employee'.
- Category ***: A text input field.
- Sub Category ***: A dropdown menu.
- Requestor**: A text input field with the value '875'.
- Department**: A text input field with the value 'Accounts'.
- Description ***: A large text area.
- Contact Details**: A text input field with the value '0'.
- Pending Since (in Days)**: A text input field with the value '0'.
- Supporting Attachments/Screenshots**: A section for uploading files. It includes a note: 'Only PDF,DOC,JPG,JPEG,PNG,MP4,XLSX,CSV and DOCX files are accepted. File size must not exceed 20 MB.' Below this is a table with columns 'Sr.No.' and 'Attachment *'. There is an 'Add Row' button and a 'No Data' message.

Figure 6-4 New IT Service Ticket Form

On the **New IT Service Ticket** form, enter the following details:

- Select the **Raise Ticket on Behalf of Other Employee** checkbox to create a ticket for another employee. If selected, choose the applicable employee.
{Note: Only a Branch Employee can raise a ticket on behalf of another employee belonging to the same branch. Similarly, only a Division Employee can raise a ticket on behalf of another employee belonging to the same division. However, an IT Support Agent is authorized to raise a ticket on behalf of any employee across the organization.}
- In the **Category** field, select the applicable IT Ticket Category.
- In the **Sub Category** field, select the applicable IT Ticket Sub Category.
- In the **Description** field, enter a detailed description of the issue.
- The **Requestor** field is automatically populated with the logged-in employee details.
- The **Department** field is automatically populated based on the logged-in employee.
- In the **Contact Details** field, verify or update the contact information, if required.
- The **Pending Since (In Days)** field is system-generated and displays the ticket aging after submission.
- In the **Supporting Attachments/Screenshots** section, click **Add Row** to upload supporting documents or screenshots related to the issue.

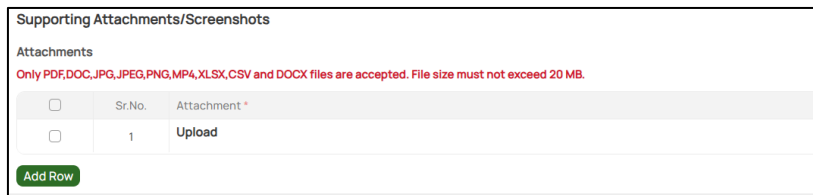


Figure 6-5 Supporting Attachments/Screenshots

- Click the **Add Row** button to add a new attachment entry.
- Click **Upload** in the Attachment column and select the required file from your device.

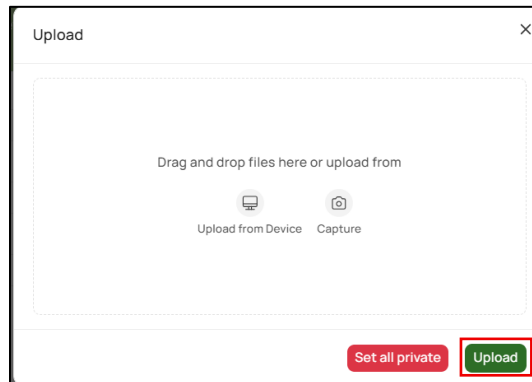


Figure 6-6 Upload Document

- After clicking **Upload** in the **Supporting Attachments/Screenshots** section, the **Upload** pop-up window is displayed, allowing the user to upload supporting files.
- On the **Upload** pop-up, perform the following steps:
- Drag and drop the required file into the upload area, or click **Upload from Device** to browse and select a file from your computer.
- Alternatively, click **Capture** to capture and upload an image using the device camera (if supported).
- After selecting the required file(s), click the **Upload** button to attach the file(s) to the IT Service Ticket.

Supporting Attachments/Screenshots

Attachments

Only PDF,DOC,JPG,JPEG,PNG,MP4,XLSX,CSV and DOCX files are accepted. File size must not exceed 20 MB.

☐	Sr.No.	Attachment *	
☐	1	/files/Screenshot (3).png	Reload File Clear

Add Row

Figure 6-7 Supporting Attachments/Screenshots (1)

- ☐ Verify that the uploaded file is listed in the Attachment column.
 - ☐ Click **Reload File** to replace the existing attachment with a new file, if required.
 - ☐ Click **Clear** to remove the uploaded attachment from the ticket.
 - ☐ Add additional attachments by clicking the Add Row button.
- Click the **Submit Ticket** button to create the IT service ticket.

- Note:** Fields marked with (*) are mandatory and must be filled before saving the form.

Confirm

Do you really want to save this document?

No Yes

Figure 6-8 Confirmation Pop-up

- Click on Yes button.


Home > Information Technology > IT Service Ticket > IT/ST/26/00020

Search or type a command (Ctrl + G)
Rajendra Saini

IT/ST/26/00020 Submitted
Back
Actions

This form is not editable due to a Workflow.

IT Support Ticket

☐ Raise Ticket on Behalf of Other Employee

Category *
Hardware

Sub Category *
Keyboard

Requestor
Rajendra P Saini

Department
Accounts

Description *
Keyboard is not working properly

Contact Details
0

Pending Since(In Days)
0

Action Against Ticket

Assigned To
SANJEEV KUMAR

Approval Log

☐	Sr.No.	Action Taken on	Action Taken By	Action	Remarks
☐	1	03-08-2026 22:05:44	Rajendra P Saini	Submitted	

Assignment History

☐	Sr.No.	Action	Assignment Mode	From Employee	To Employee	Assigned On
☐	1	Assigned	Internal Team		SANJEEV KUMAR	03-08-2026 22:05:44

Figure 6-9 New IT Service Ticket Form- Saved

- After submitting the **New IT Service Ticket** form, the system generates a unique **IT Service Ticket ID** and displays the ticket details in a read-only mode.
- The ticket is automatically routed to the appropriate IT support team based on the configured routing rules.
- Users can view the ticket information, assigned support personnel, approval log, and assignment history.

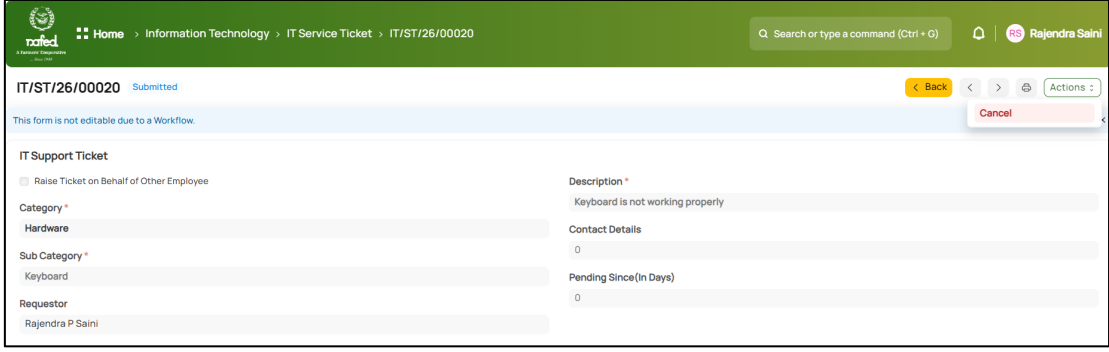


Figure 6-10 Action Button

- Click on the Action Button located at the top-right corner of the screen.
- select the Cancel option from the drop-down menu, if a ticket has been raised accidentally or is no longer required.

4.2 Raise a New IT Service Ticket with Approval Category

To Raise New IT Ticket with Approval

- Employee Login into the Saksham ERP System. Click on the Home button. From the list of available divisions, select the Information Technology Division to access the Information Technology Dashboard.

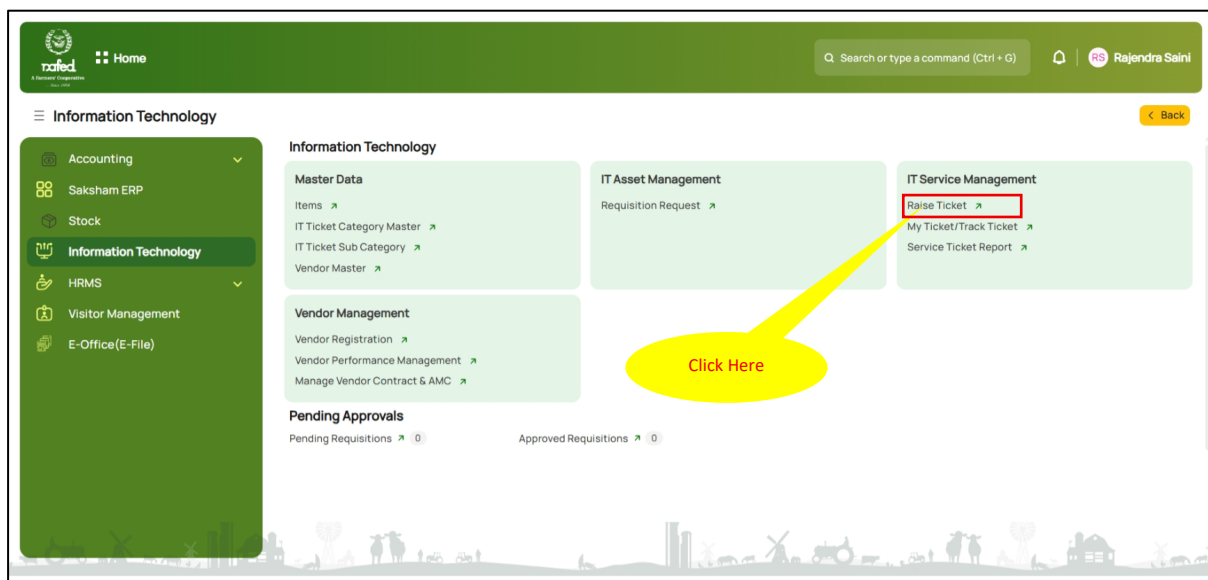
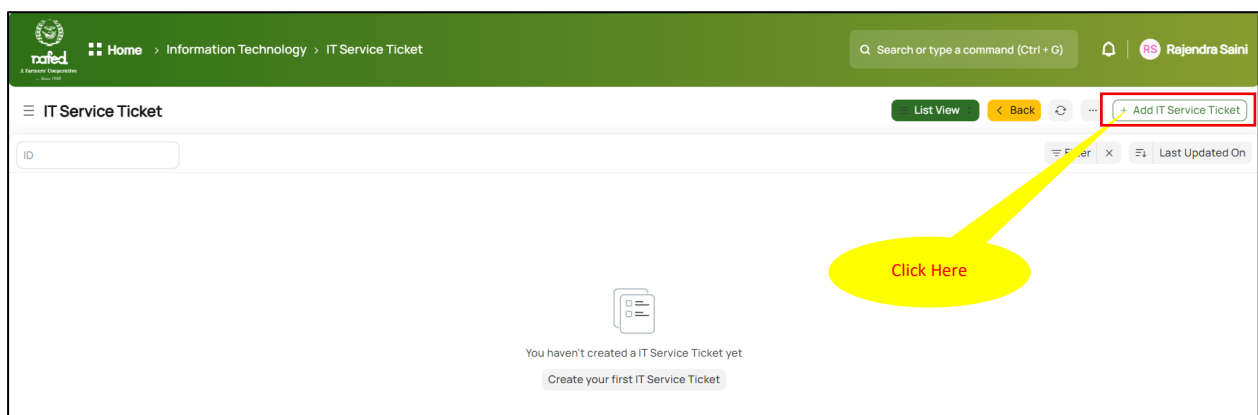


Figure 11- Raise Ticket

- Under the **IT Service Management** click on the **Raise Ticket**.



- The system will open the **IT Service Ticket** page.
- Click the **+ Add IT Service Ticket** button located at the top-right corner of the screen.
- The system will open the **New IT Service Ticket** Form.

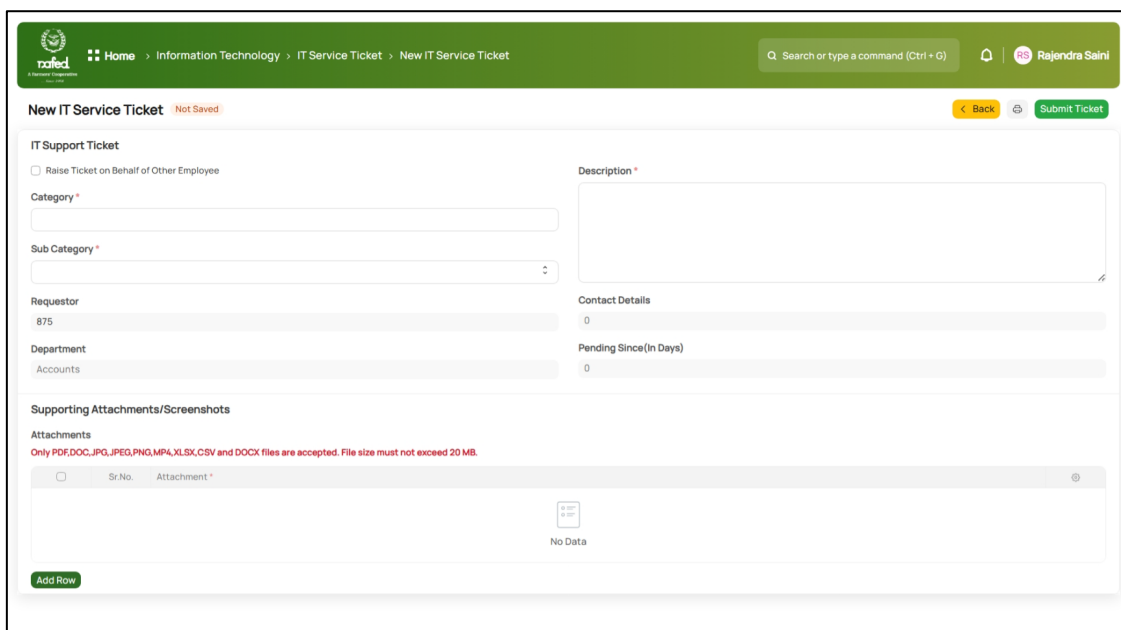


Figure 6-12 New IT Service Ticket Form

On the **New IT Service Ticket** form, enter the following details:

- Select the **Raise Ticket on Behalf of Other Employee** checkbox to create a ticket for another employee. If selected, choose the applicable employee.
- In the **Category** field, select **With Approval** Category.
- In the **Sub Category** field, select the applicable IT Ticket Sub Category.
- In the **Description** field, enter a detailed description of the issue.
- The **Requestor** field is automatically populated with the logged-in employee details.
- The **Department** field is automatically populated based on the logged-in employee.
- In the **Contact Details** field, verify or update the contact information, if required.
- The **Pending Since (In Days)** field is system-generated and displays the ticket aging after submission.
- In the **Supporting Attachments/Screenshots** section, click **Add Row** to upload supporting documents or screenshots related to the issue.
- Click the **Submit Ticket** button to create the IT service ticket.

- **Note:** Fields marked with (*) are mandatory and must be filled before saving the form.

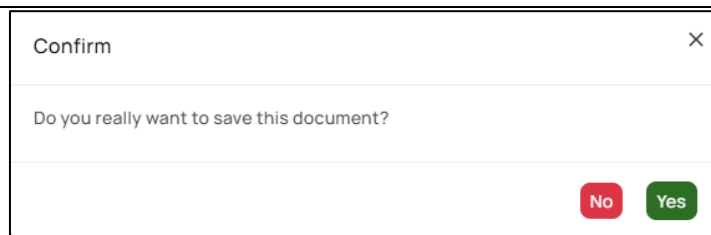
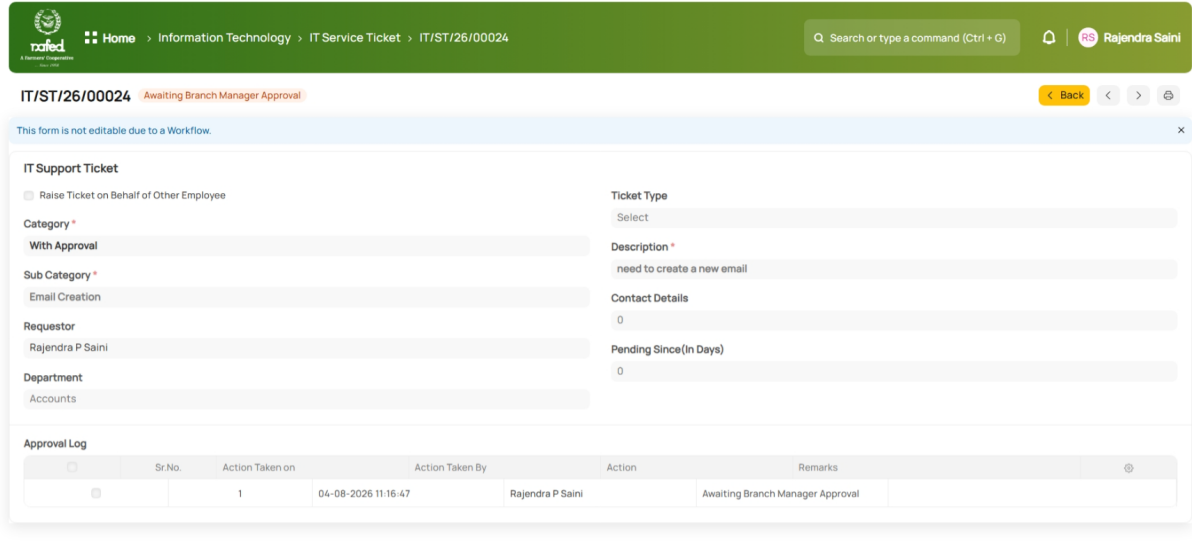


Figure 6-13 Confirmation Pop-up

- Click on Yes button.



IT Support Ticket

☐ Raise Ticket on Behalf of Other Employee

Category *
With Approval

Sub Category *
Email Creation

Requestor
Rajendra P Saini

Department
Accounts

Ticket Type
Select

Description *
need to create a new email

Contact Details
0

Pending Since(In Days)
0

Approval Log

Sr.No.	Action Taken on	Action Taken By	Action	Remarks
1	04-08-2026 11:16:47	Rajendra P Saini		Awaiting Branch Manager Approval

Figure 6-14 New IT Service Ticket Form- Awaiting Branch Manager Approval

- After clicking the **Submit Ticket** button, the system generates a unique **IT Service Ticket ID**, the ticket status is updated to Awaiting Branch Manager Approval (or Awaiting Division Head Approval, as applicable).
- The ticket is routed to the respective Branch Manager or Division Head for review and approval.

4.3 Respond to a Clarification Request for an IT Service Ticket

If the IT Support Agent sends the IT Service Ticket back to the employee for clarification, the employee receives an email notification requesting the required clarification.

Subject: IT Ticket Send Back for Clarification - IT/ST/26/00026

Hello Rajendra Saini,

Your IT Ticket "IT/ST/26/00026" has been sent back for clarification.

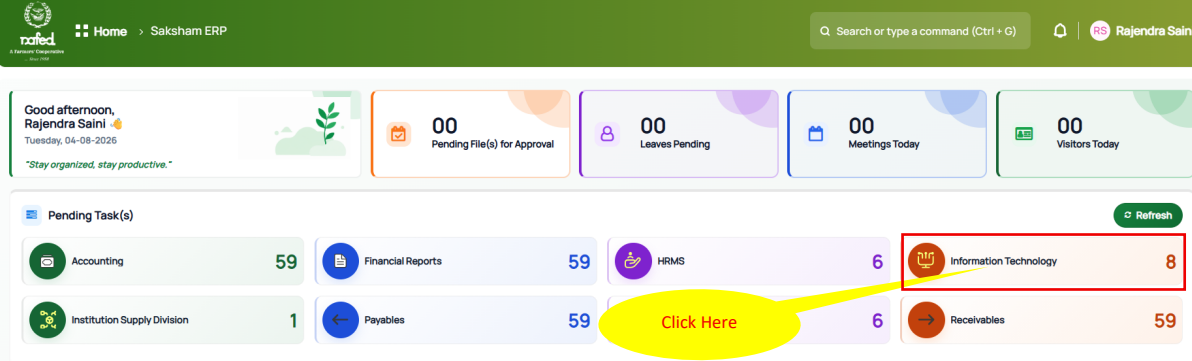
Current Status : Send Back for Clarification
Remark : Please provide a screenshot of the error message.

You can view the ticket here:
<https://yourcompany.erpnext.com/app/it-service-ticket/IT-2026-0012>

Thank you,
IT Division

Figure 6-15 Mail Format of Send Back for Clarification

- Employee login into ERP System.**



Good afternoon, Rajendra Saini
Tuesday, 04-08-2026
"Stay organized, stay productive."

00 Pending File(s) for Approval

00 Leaves Pending

00 Meetings Today

00 Visitors Today

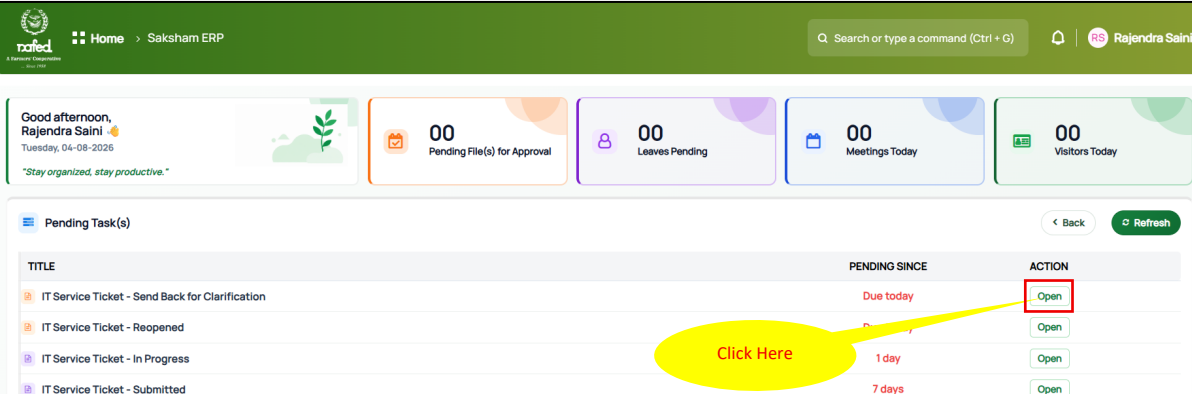
Pending Task(s)

Accounting	59	Financial Reports	59	HRMS	6	Information Technology	8
Institution Supply Division	1	Payables	59		6	Receivables	59

Click Here

Figure 6-16 Employee Dashboard

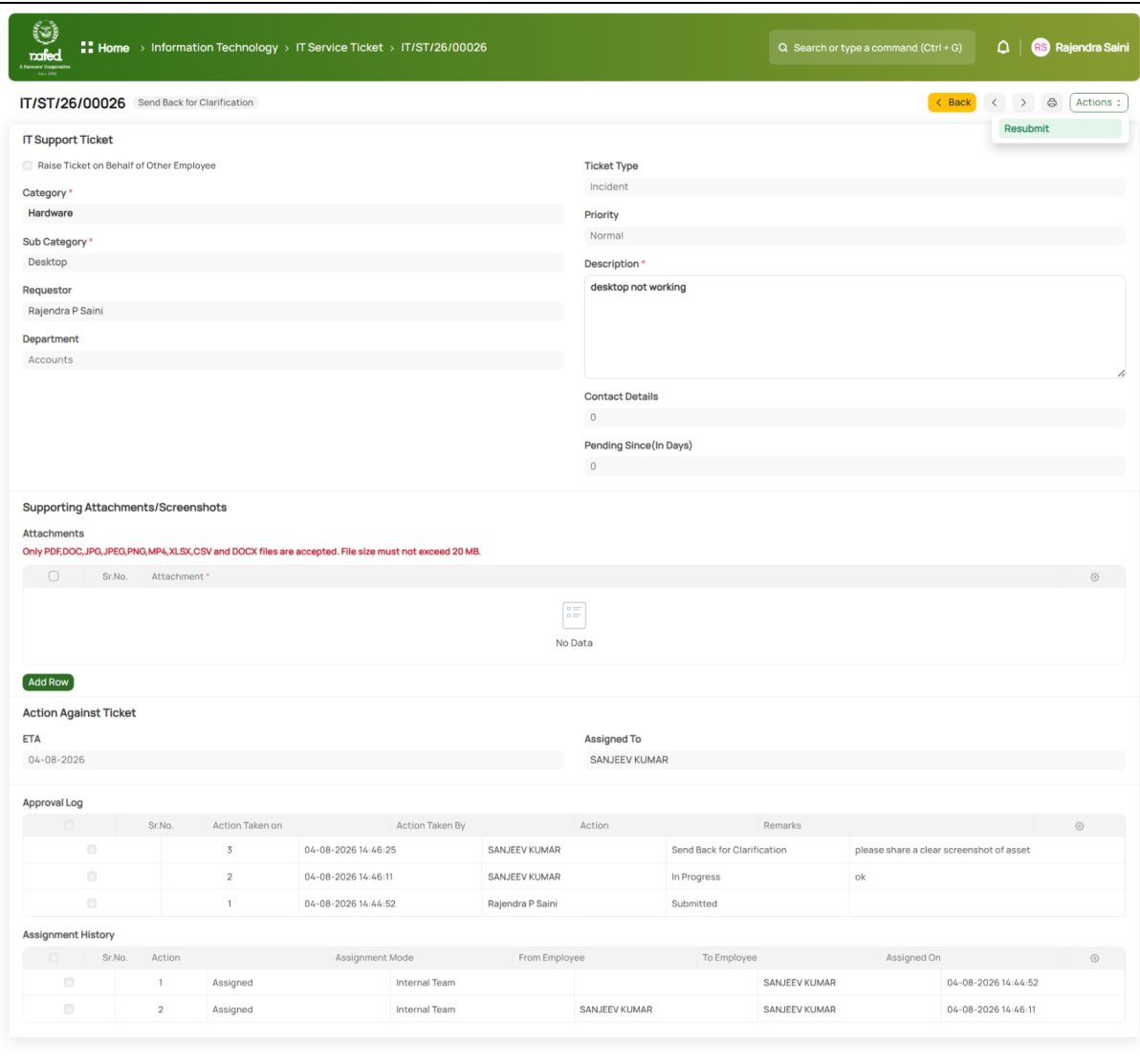
- Under **Pending Task (s)** section, click on the **Information Technology** to view the pending task.



TITLE	PENDING SINCE	ACTION
IT Service Ticket - Send Back for Clarification	Due today	Open
IT Service Ticket - Reopened		Open
IT Service Ticket - In Progress	1 day	Open
IT Service Ticket - Submitted	7 days	Open

Figure 6-17 Pending Tasks

- After the **IT Support Agent** sends the IT Service Ticket back for clarification, the ticket appears in the **Pending Tasks** list of the employee.
- The employee also receives an email notification requesting the required clarification.
- Click the **Open** button corresponding to the **IT Service Ticket** to review the clarification requested by the **IT Support Agent**.



IT/ST/26/00026 Send Back for Clarification

IT Support Ticket

☐ Raise Ticket on Behalf of Other Employee

Category *
Hardware

Sub Category *
Desktop

Requestor
Rajendra P Saini

Department
Accounts

Ticket Type
Incident

Priority
Normal

Description *
desktop not working

Contact Details
0

Pending Since(In Days)
0

Supporting Attachments/Screenshots

Attachments
Only PDF,DOC,JPG,JPEG,PNG,MP4,XLSX,CSV and DOCX files are accepted. File size must not exceed 20 MB.

Action Against Ticket

ETA
04-08-2026

Assigned To
SANJEEV KUMAR

Approval Log

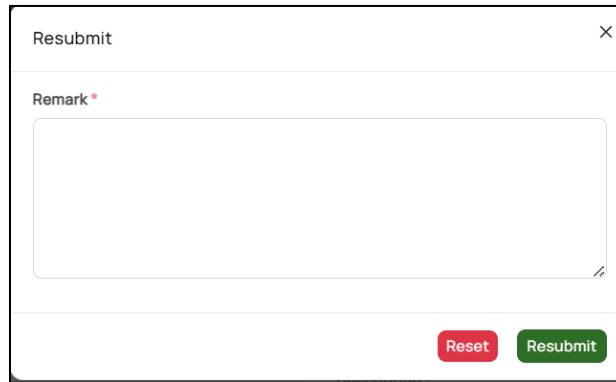
Sr.No.	Action Taken on	Action Taken By	Action	Remarks
3	04-08-2026 14:46:25	SANJEEV KUMAR	Send Back for Clarification	please share a clear screenshot of asset
2	04-08-2026 14:46:11	SANJEEV KUMAR	In Progress	ok
1	04-08-2026 14:44:52	Rajendra P Saini	Submitted	

Assignment History

Sr.No.	Action	Assignment Mode	From Employee	To Employee	Assigned On
1	Assigned	Internal Team		SANJEEV KUMAR	04-08-2026 14:44:52
2	Assigned	Internal Team	SANJEEV KUMAR	SANJEEV KUMAR	04-08-2026 14:46:11

Figure 6-18 IT Service Ticket- Action Screen

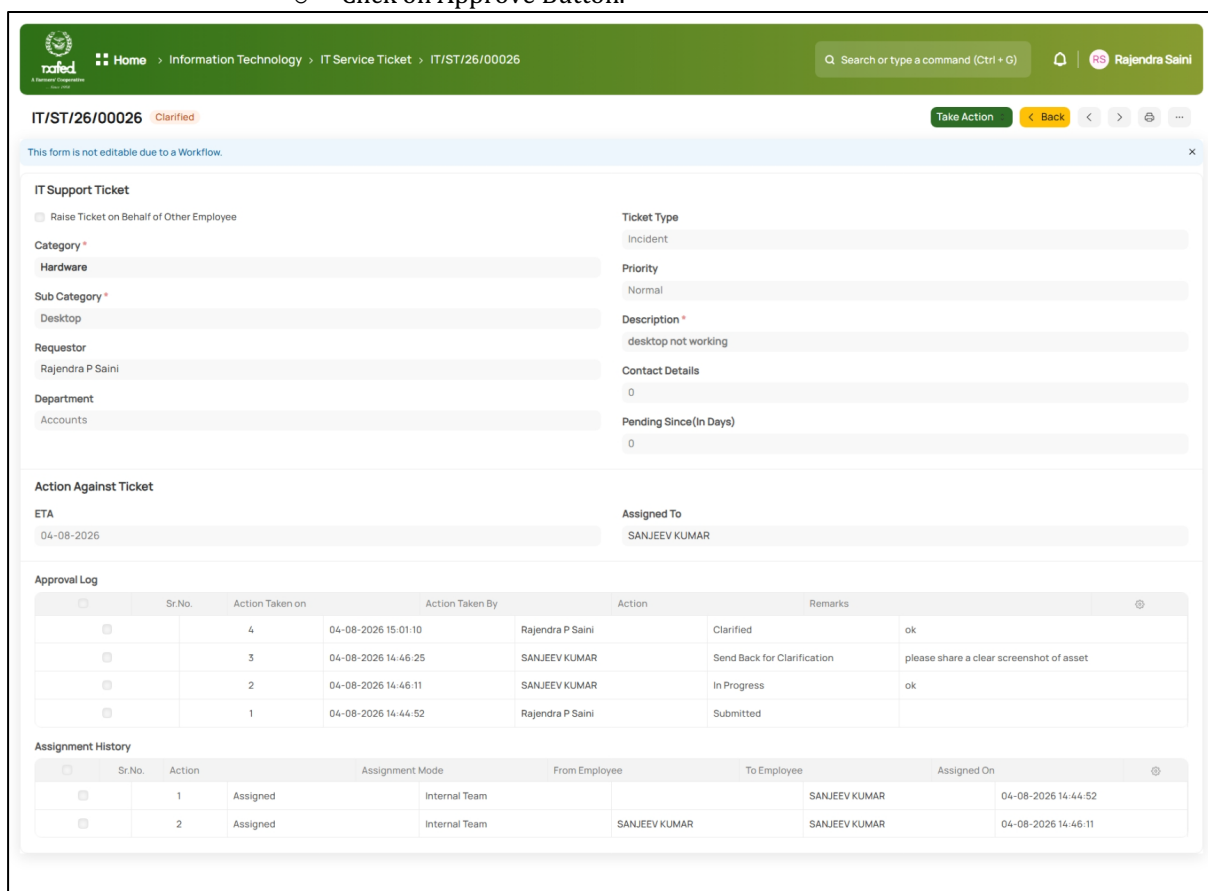
- Check the remarks given by service agent under Approval Log Section.
- Upload the clear Image or screenshot again.
- Click on Action button and Select the Resubmit button.



A pop-up window titled 'Resubmit' with a close button (X) in the top right corner. Inside the window, there is a label 'Remark *' followed by a large text area for entering a remark. At the bottom right of the window, there are two buttons: 'Reset' (red) and 'Resubmit' (green).

Figure 6-19 Resubmit Remark

- After clicking on Approve button, Remark pop-up appears.
- Enter the remark in Remark Section.
- Click on Approve Button.



A screenshot of the NAFED IT Service Ticket system interface. The top navigation bar shows the path: Home > Information Technology > IT Service Ticket > IT/ST/26/00026. The ticket status is 'Clarified'. The form contains the following sections:

- IT Support Ticket:** Includes fields for Category (Hardware), Sub Category (Desktop), Requestor (Rajendra P Saini), Department (Accounts), Ticket Type (Incident), Priority (Normal), Description (desktop not working), Contact Details (0), and Pending Since (0 days).
- Action Against Ticket:** Includes ETA (04-08-2026) and Assigned To (SANJEEV KUMAR).
- Approval Log:** A table showing the history of actions taken on the ticket.

Sr.No.	Action Taken on	Action Taken By	Action	Remarks
4	04-08-2026 15:01:10	Rajendra P Saini	Clarified	ok
3	04-08-2026 14:46:25	SANJEEV KUMAR	Send Back for Clarification	please share a clear screenshot of asset
2	04-08-2026 14:46:11	SANJEEV KUMAR	In Progress	ok
1	04-08-2026 14:44:52	Rajendra P Saini	Submitted	
- Assignment History:** A table showing the history of assignments.

Sr.No.	Action	Assignment Mode	From Employee	To Employee	Assigned On
1	Assigned	Internal Team		SANJEEV KUMAR	04-08-2026 14:44:52
2	Assigned	Internal Team	SANJEEV KUMAR	SANJEEV KUMAR	04-08-2026 14:46:11

Figure 6-20 IT Service Ticket- Clarified

- After clicking the **Submit Ticket** button, the status of the **IT Service Ticket** is updated to **Clarified**.
- The ticket is automatically routed to the configured **IT Support Agent** for further review and processing.
- The assigned **IT Support Agent** receives a notification informing them that the requested clarification has been submitted.

4.4 Raise a Follow-Up on an Unresolved IT Service Ticket

- If the expected resolution time (ETA) has been exceeded and the issue is still unresolved, the employee can submit a follow-up comment to the IT Support Team.
- Perform the following steps:
- Open the required **IT Service Ticket**.

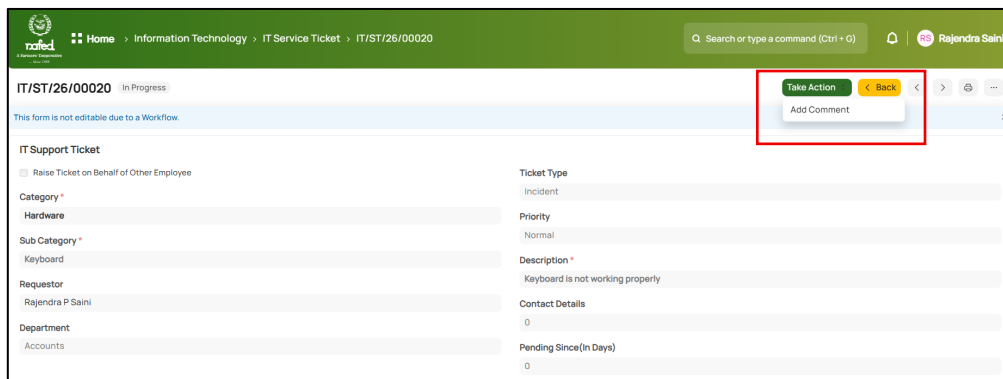


Figure 6-21 Take Action on unresolved IT Service Ticket

- Click the **Take Action** button.
- Select the **Add Comment** option.
- Enter the required comment or complaint regarding the delay in ticket resolution.
- Click **Submit** to save the comment.
- After submitting the comment, it is added to the ticket's communication history.
- The IT Support Team is notified of the new comment and can review the concern and take appropriate action.
- All comments, along with the user, date, and time, are recorded in the system for future reference and audit purposes.

{Note: The Add Comment option is available only after the expected resolution time (ETA) has been exceeded. It allows the employee to follow up on delayed tickets and notify the IT Support Team about the pending issue.}

4.5 Reopen a Resolved IT Service Ticket

To reopen a resolved IT Service ticket

- Once the **IT Service Ticket** is resolved by the **IT Support Agent**, the ticket status is updated to **Resolved**.

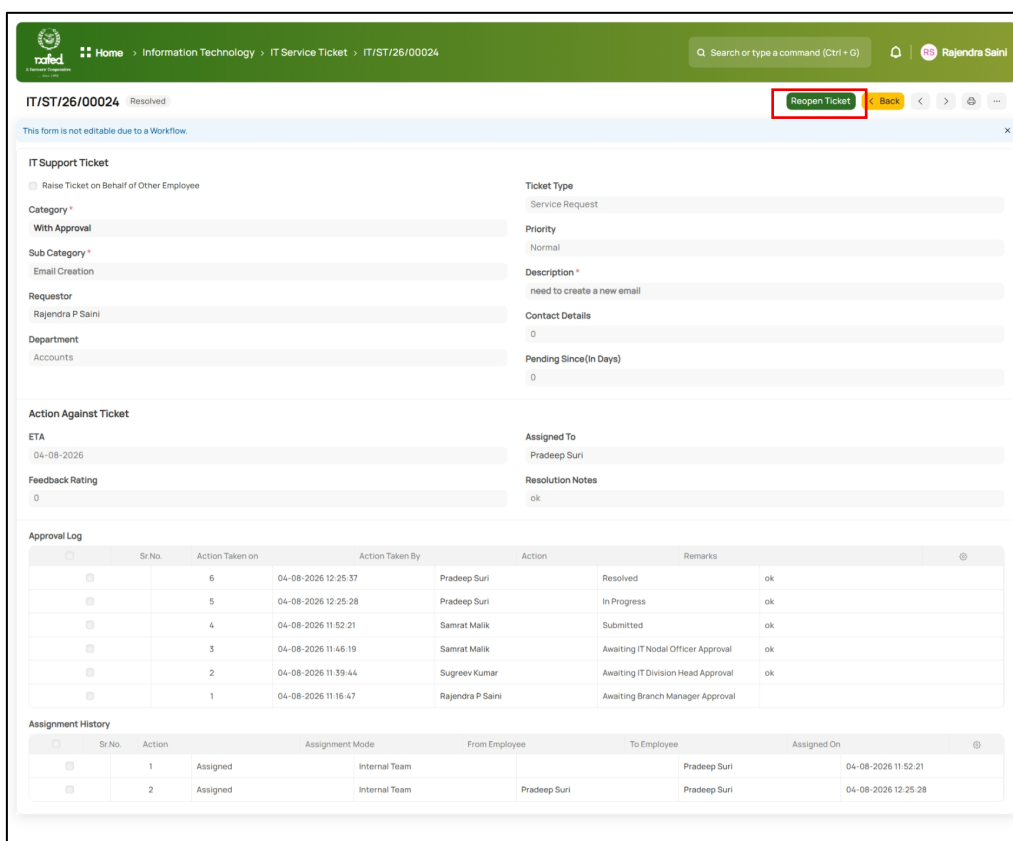
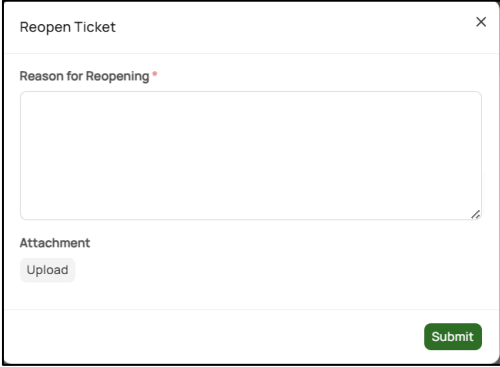


Figure 6-22 Reopen Ticket

- If the issue persists or is not resolved satisfactorily after the ticket has been marked as **Resolved**, the employee can reopen the IT Service Ticket for further investigation.
- Click the **Reopen Ticket** button available at the top of the page.



Reopen Ticket

Reason for Reopening *

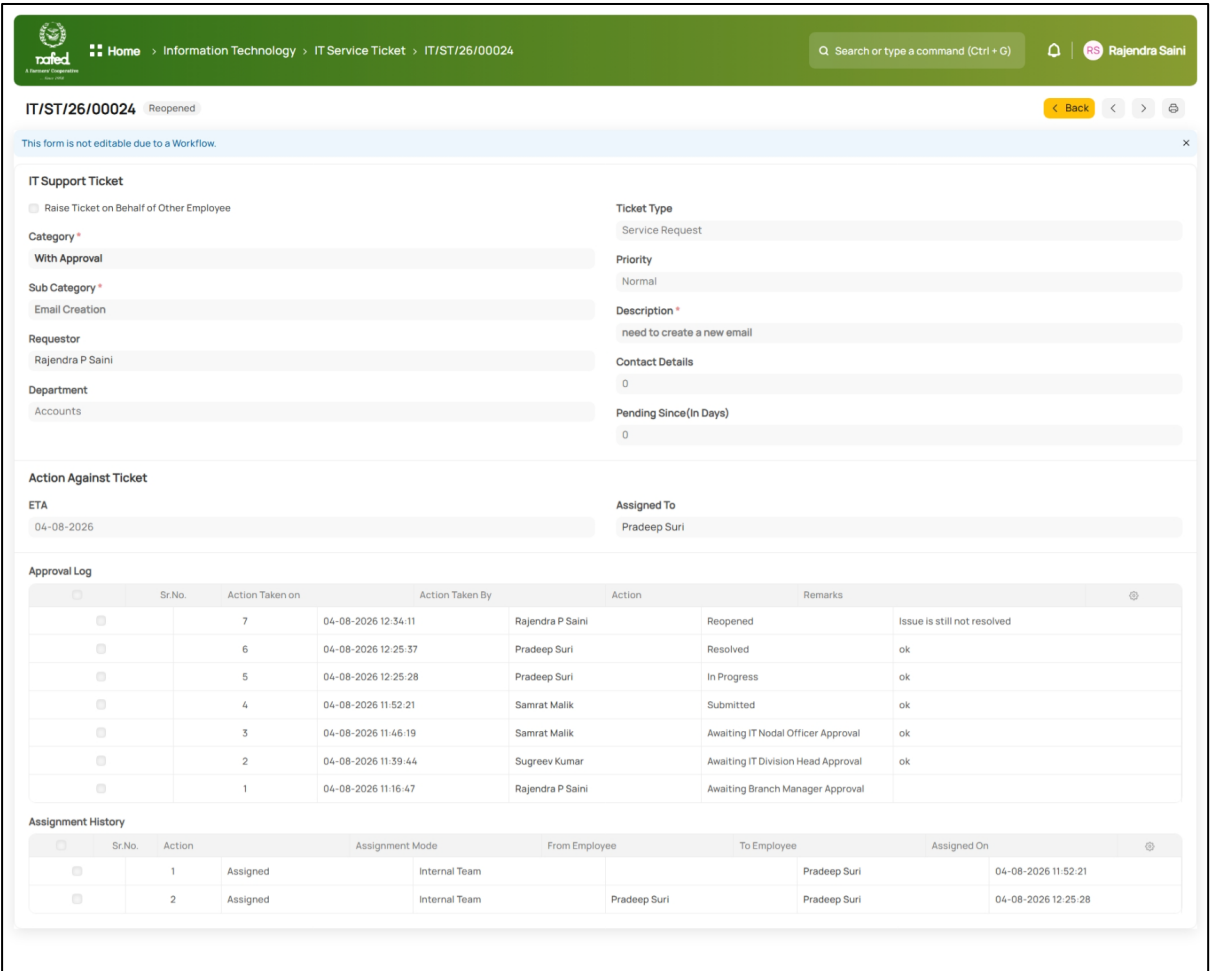
Attachment

Upload

Submit

Figure 6-23 Reason for Reopening

- The system displays the **Reopen Ticket** window, allowing the user to provide the reason for reopening the ticket.



IT/ST/26/00024 Reopened

This form is not editable due to a Workflow.

IT Support Ticket

☐ Raise Ticket on Behalf of Other Employee

Category *
With Approval

Sub Category *
Email Creation

Requestor
Rajendra P Saini

Department
Accounts

Ticket Type
Service Request

Priority
Normal

Description *
need to create a new email

Contact Details
0

Pending Since(In Days)
0

Action Against Ticket

ETA
04-08-2026

Assigned To
Pradeep Suri

Approval Log

Sr.No.	Action Taken on	Action Taken By	Action	Remarks
7	04-08-2026 12:34:11	Rajendra P Saini	Reopened	Issue is still not resolved
6	04-08-2026 12:25:37	Pradeep Suri	Resolved	ok
5	04-08-2026 12:25:28	Pradeep Suri	In Progress	ok
4	04-08-2026 11:52:21	Samrat Malik	Submitted	ok
3	04-08-2026 11:46:19	Samrat Malik	Awaiting IT Nodal Officer Approval	ok
2	04-08-2026 11:39:44	Sugreev Kumar	Awaiting IT Division Head Approval	ok
1	04-08-2026 11:16:47	Rajendra P Saini	Awaiting Branch Manager Approval	

Assignment History

Sr.No.	Action	Assignment Mode	From Employee	To Employee	Assigned On
1	Assigned	Internal Team		Pradeep Suri	04-08-2026 11:52:21
2	Assigned	Internal Team	Pradeep Suri	Pradeep Suri	04-08-2026 12:25:28

Figure 6-24 Ticket Reopened

- After clicking the **Submit** button, the IT Service Ticket status is updated to **Reopened**.
- The ticket is assigned back to the previously assigned **IT Support Agent** for further investigation and resolution.
- The **Approval Log** section is automatically updated with the reopening details, including the action performed, remarks, user, date, and time.

5 Branch Manager or Division Head- Activities

5.1 To Approve IT Service Ticket (With Approval Category) Raised by employee

To Approve IT Service Ticket Raise by Employee

- Employee Login into the Saksham ERP System.

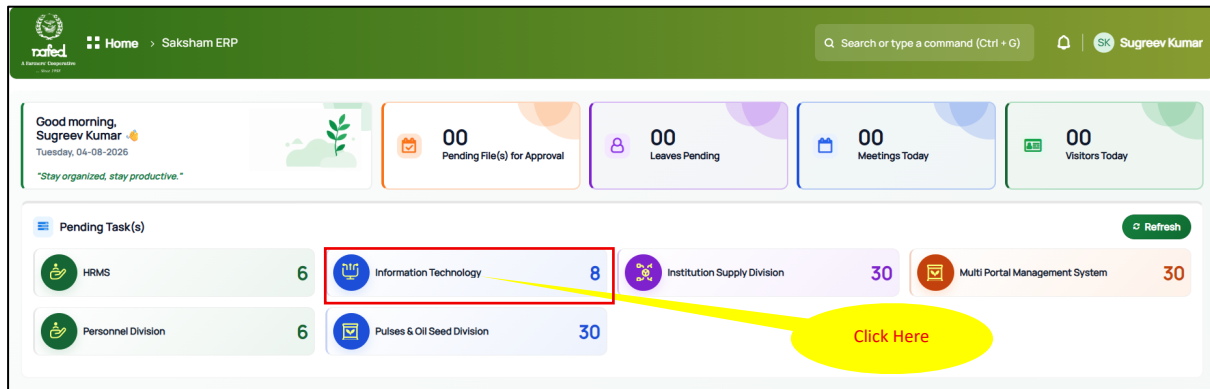


Figure 6-25 Branch Manager or Division Head Dashboard

- Under **Pending Task (s)** section, click on the **Information Technology** to view the pending task.

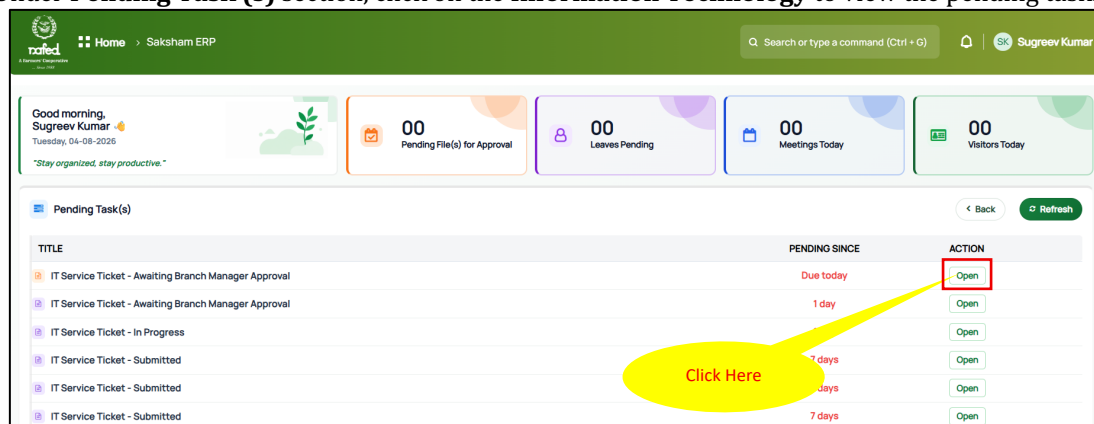


Figure 6-26 Pending Task

- After an IT Service Ticket (With Approval) is raised by an employee, the ticket appears in the **Pending Tasks** list of the Branch Manager or Division Head.
- Click the **Open** button corresponding to the IT Service Ticket to review the ticket details and perform the required action.

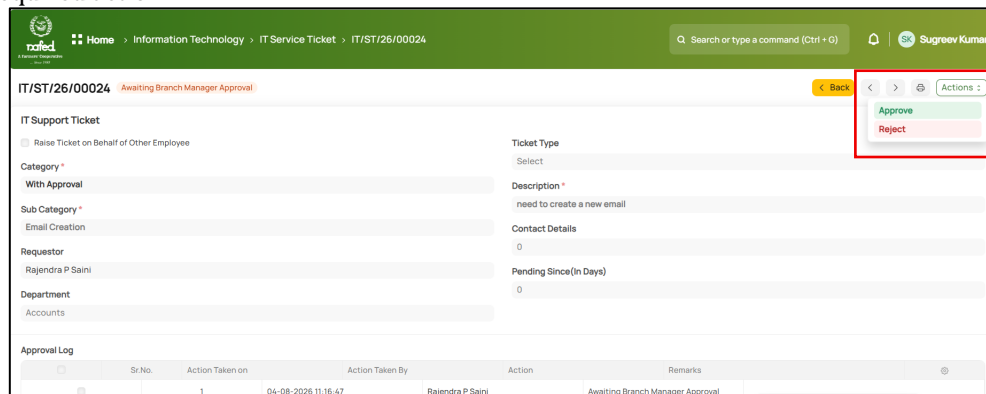


Figure 6-27 Action Screen

- System will open the IT Service Ticket (with approval) form.
- Review the ticket details, including the requestor information, category, sub category, description, and supporting attachments.
- Click the Actions button.
- Select Approve to approve the ticket and forward it for further processing.
- Select Reject to reject the ticket if the request is not valid or does not meet the required criteria.
- Select the Approve option.

Approve

Remark *

Reset

Approve

Figure 6-28 Approve Remark

- After clicking on Approve button, Remark pop-up appears.
- Enter the remark in Remark Section.
- Click on Approve Button.



[Home](#) >
[Information Technology](#) >
[IT Service Ticket](#) >
[IT/ST/26/00024](#)

Search or type a command (Ctrl + G)

 Sugreev Kumar

IT/ST/26/00024

Awaiting IT Division Head Approval

Back

This form is not editable due to a Workflow.

IT Support Ticket

☐ Raise Ticket on Behalf of Other Employee

Category *

With Approval

Sub Category *

Email Creation

Requestor

Rajendra P Saini

Department

Accounts

Ticket Type

Select

Description *

need to create a new email

Contact Details

0

Pending Since(In Days)

0

Approval Log

	Sr.No.	Action Taken on	Action Taken By	Action	Remarks
☐	2	04-08-2026 11:39:44	Sugreev Kumar	Awaiting IT Division Head Approval	ok
☐	1	04-08-2026 11:16:47	Rajendra P Saini	Awaiting Branch Manager Approval	

Figure 6-29 IT Service Ticket- Awaiting IT Division Head Approval

- After clicking the **Approve** button, the ticket status is updated to Awaiting IT Division Head Approval.
- The ticket is routed to the IT Division Head for review and approval.

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