Web Help Desk Technician Guide

Version 1.0

Information Technology Services
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I. INTRODUCTION

Web Help Desk is ticket tracking software used by Pace University. It has features that include a system for creating, tracking and analyzing issues and inquiries placed by students, faculty and staff. The system creates "tickets" which in essence are work orders that can be updated by the user (client) and technicians.

II. GETTING STARTED

A. Signing into Web Help Desk

- Go to https://help.pace.edu
- Log in with your ***MyPace Portal Username*** and ***Password***

Web Help Desk sessions last for 120 minutes. After 120 minutes technicians will need to log in again.

B. Exiting Web Help Desk

- Click the **Log Out** () button located in the upper right hand corner next to your name

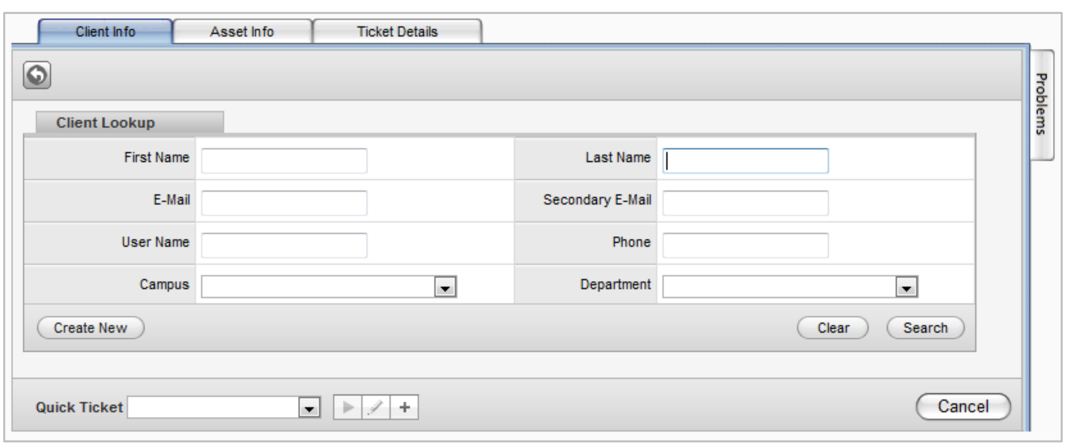
III. TICKETS PANEL

A. Creating a New Ticket

- Log into Web Help Desk with your ***MyPace Portal Username and Password***
- Click on the **Tickets** icon at the top of the screen

- Click on the **New Ticket**  button

- To search for the Client, enter either the client's name, e-mail, username, **or** location and click **Search**



- Select the **Client's Name** to populate the ticket with the client's information

If there is only one match to your search criteria, the system will automatically load that record. If the wrong client was selected, click the **Unassign Client** button to return to the **Client Lookup Screen**.

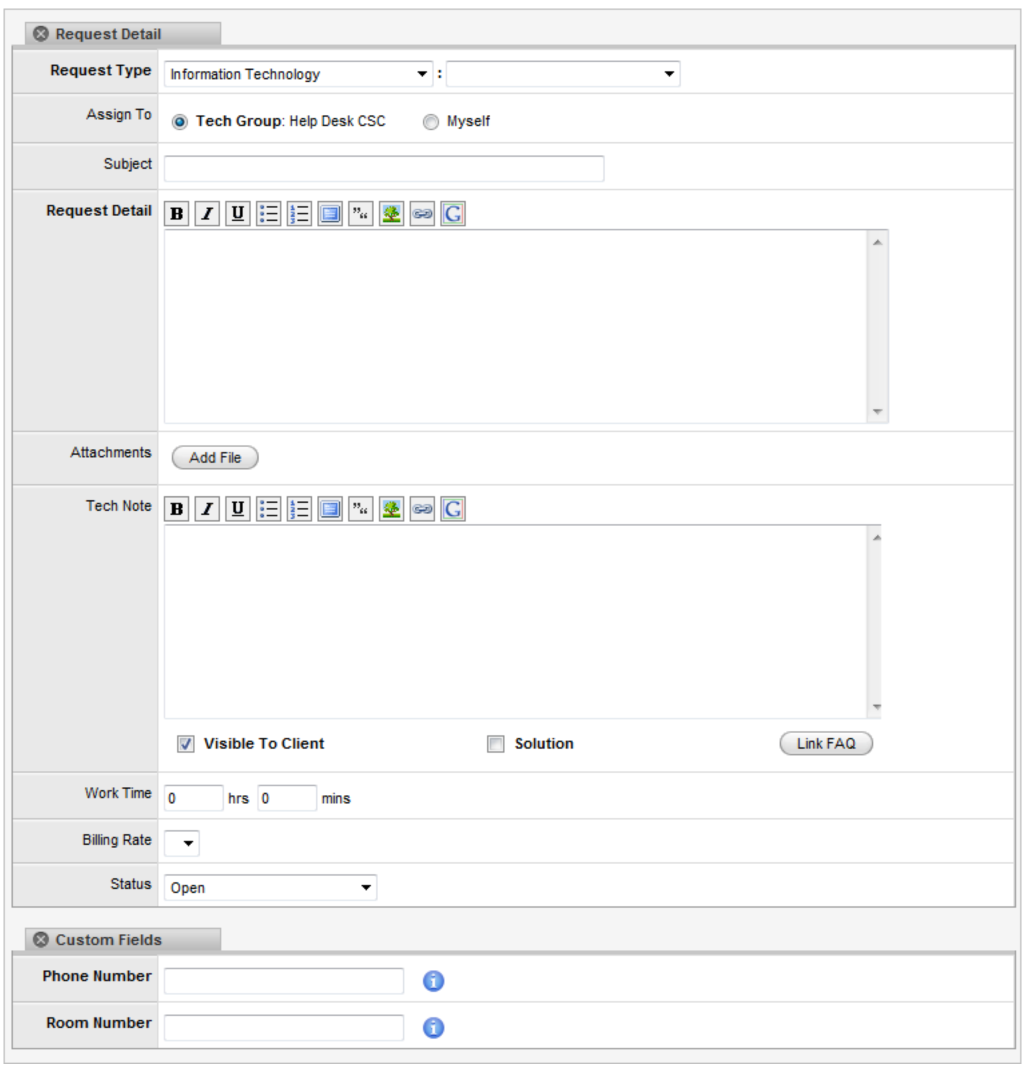
NOTE: If you need to update a client's contact information for this ticket, be sure to include that information in the Request Details.

- Click on the **Ticket Details** tab to enter the ticket information
- Scroll to the **Campus** section

By default, the client's location should be populated from their client record. If the information is not correct or needs to be changed, please use the drop down menus to select the client's current Campus and Building.

1. Adding Ticket Details

- Scroll down to the rest of the **Ticket Details** in the request



Enter the following information for the appropriate fields:

Request Type: Use the drop down menus to select the appropriate request type.

Subject: Type a summary of the request.

Request Detail: Type detailed information about the client's request. Please note that this information is visible to the client.

Attachments: Attach any necessary documents, screenshots, etc.

Tech Note: Enter any and all information about any troubleshooting/updates/solutions for this request.

NOTE: Please *uncheck* the "Visible to Client" option if you do not wish the client to see a specific note.

Color Coding for Notes:

Blue	Note is visible to clients
Gray	Note is not visible to clients
Green	Note contains solution for the ticket
Yellow	Note entered by the clients

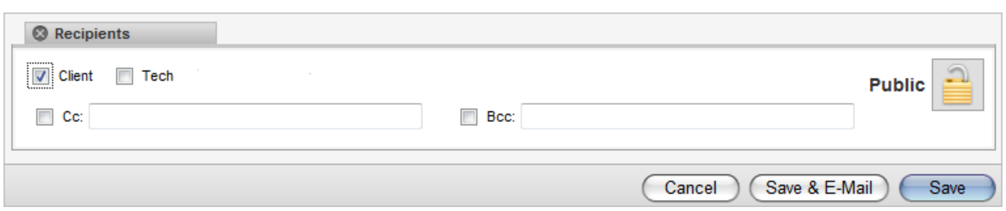
Status: Use the drop down menu to select the Status of the request. Do not select the "Closed" option unless the ticket has been resolved.

NOTE: Please remember to update the status of a ticket as often as possible.

Depending on **Request Type** and **Subtypes**, select **Custom Fields** will appear. Some fields are required, while others are not (**bold** text indicates a required field). You must fill in the required fields before saving a ticket.

2. Selecting Recipients

- Scroll to the **Recipients** section and verify who will receive email notification when this ticket is saved



- Click **Save & Email** button to submit the ticket and send e-mail to selected recipients.
  Note: Please DO NOT select Level 1 Techs or Group Manager as a recipient as this option will send the ticket to all techs in that Tech Group

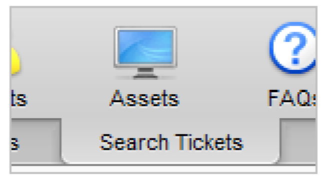
3. Using the CC and BCC option

Selecting the **Carbon Copy (Cc)** or **Blind Carbon Copy (Bcc)** fields in the **Recipient area** of the ticket will send email notification to someone other than the client or tech.

To use this option:

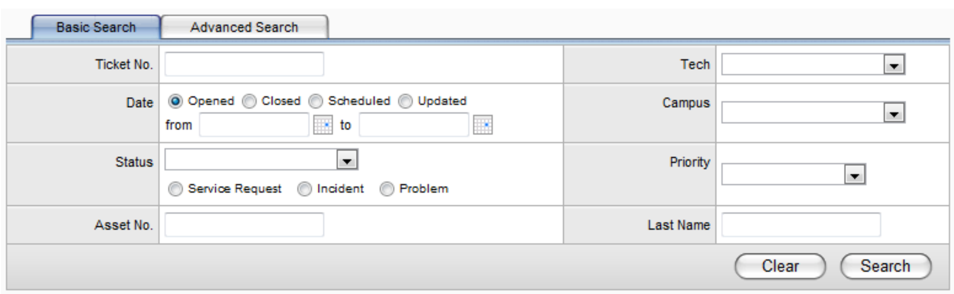
- Check off the box next to the **Cc:** or **Bcc:** fields in the **Recipient** area of the ticket
- Type in ***user's e-mail address*** (Use a comma to separate multiple e-mail addresses)

B. Searching for a Ticket

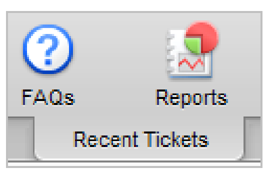


- Click on the **Tickets** icon at the top of the screen
- Click on the **Search Tickets** tab

The **Basic Search** tab is active. You can search for a ticket by using any of the following methods: **Ticket Number**, **Dates**, **Status**, **Tech**, **Priority**, or **Client's Last Name**.

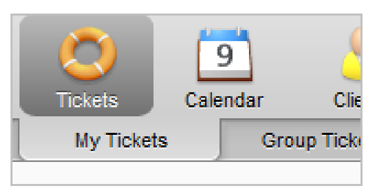


- You can also view tickets that have been recently updated in your Tech Group by clicking on the **Recent Tickets** tab



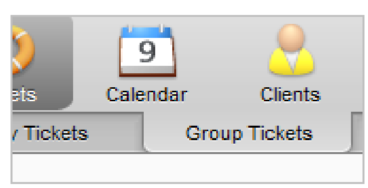
C. Finding Tickets Assigned to Me or My Tech Groups

1. Finding Tickets Assigned to Me



- Click on the **Tickets** icon
- Click on the **My Tickets** tab

2. Finding Tickets Assigned to My Tech Groups

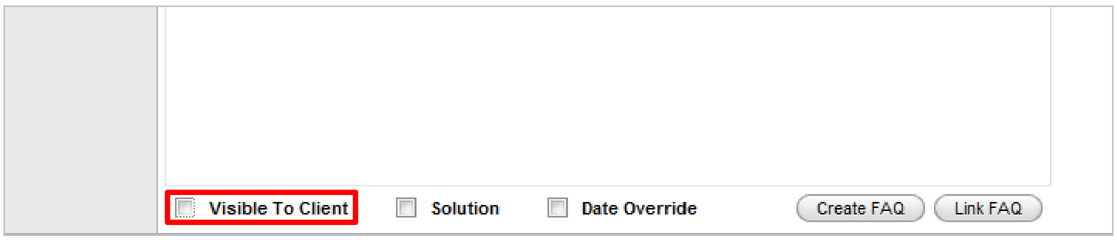


- Click on the **Tickets** icon
- Click on the **Group Tickets** tab

D. Adding Notes

- Follow the instructions for searching for a ticket and open the ticket you would like to add a note to
- Scroll down to the **Notes** section and click on the **New** button to create a new note

NOTE: If you wish to make the note of a ticket not visible to users, please make sure to uncheck the Visible To Client option. If you do not uncheck this option, the user will be able to see the note and all its contents.



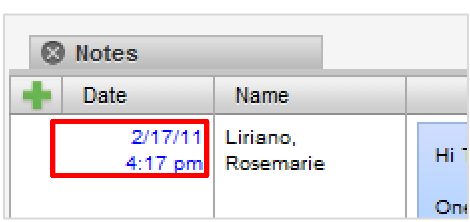
- Type the note for the work order in the space provided and click **Save** to save the note

- Scroll to the **Recipients** section and verify who will receive email notification when this ticket is saved
- Click **Save & Email** button to save and e-mail updates to all recipients

1. Updating or Editing a Note

To edit a note you created:

- Click on the date and timestamp located to the left of the note

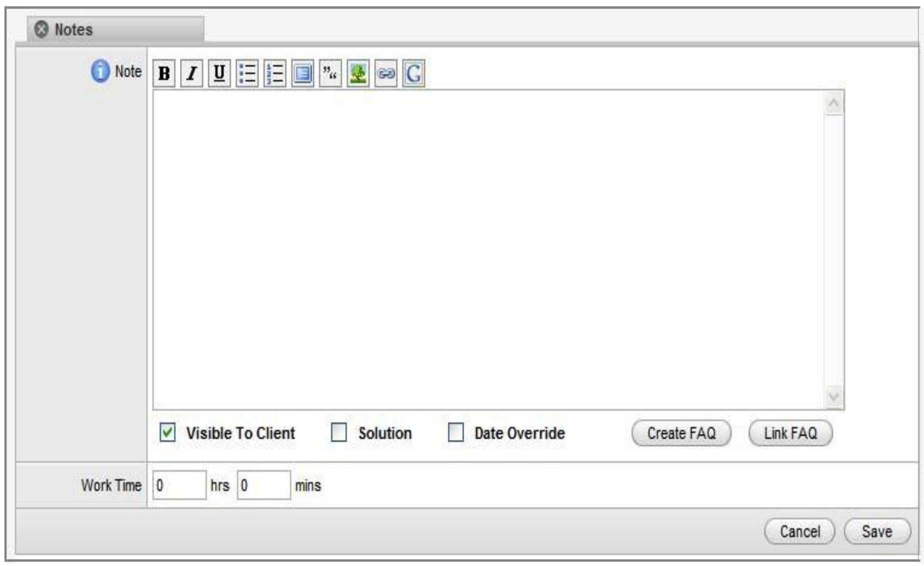


- Click the **Save** button in the Notes area to save changes

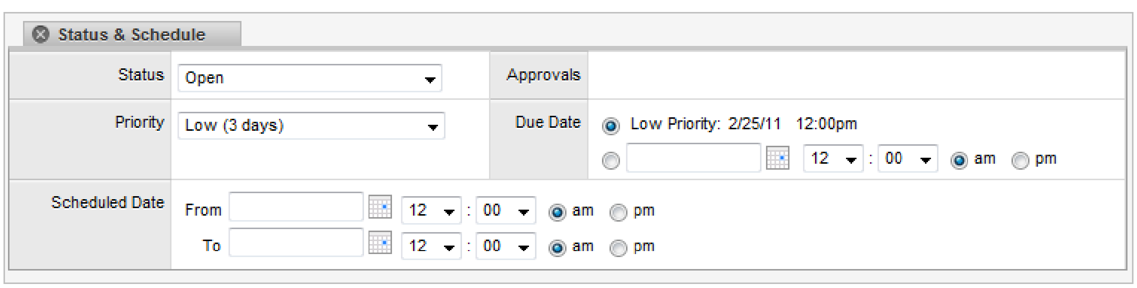
NOTE: You will not be able to edit or update any notes created by another Tech or user.

E. Updating the Ticket Status

- Follow the instructions for searching for a ticket and open the ticket you would like to update
- Scroll down to the **Notes** section and click on the **New** button to create a new note
- Enter information on why the ticket status was changed and save the note



- Scroll to the **Status & Schedule** section and select the appropriate status from the **Status** drop down menu



- Scroll to the **Recipients** section and verify who will receive e-mail notification when this ticket is saved
- Click the **Save & Email** button to save and submit the ticket changes

F. Updating the Ticket Priority

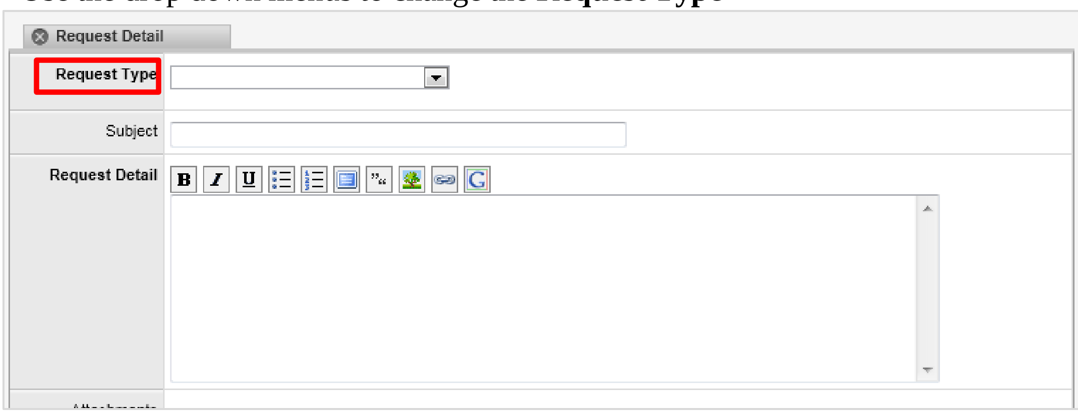
- Follow the instructions for searching for a ticket and open the ticket you would like to update
- Scroll to the **Status & Schedule** section and select the appropriate priority from the **Priority** drop down menu

IMPORTANT: If the priority of a ticket is set to Urgent and needs to be completed as soon as possible, please contact the appropriate person to expedite the request.

G. Changing Request Types

If a ticket needs to be transferred to another Department outside of **Information Technology** (such as Enrollment Management, Facilities, OSA, Finance, etc.), **please make sure to contact someone in the Department before the ticket is transferred to so they are aware of the request** and follow the instructions listed below:

- Scroll down to the **Details** section of the ticket
- Use the drop down menus to change the **Request Type**

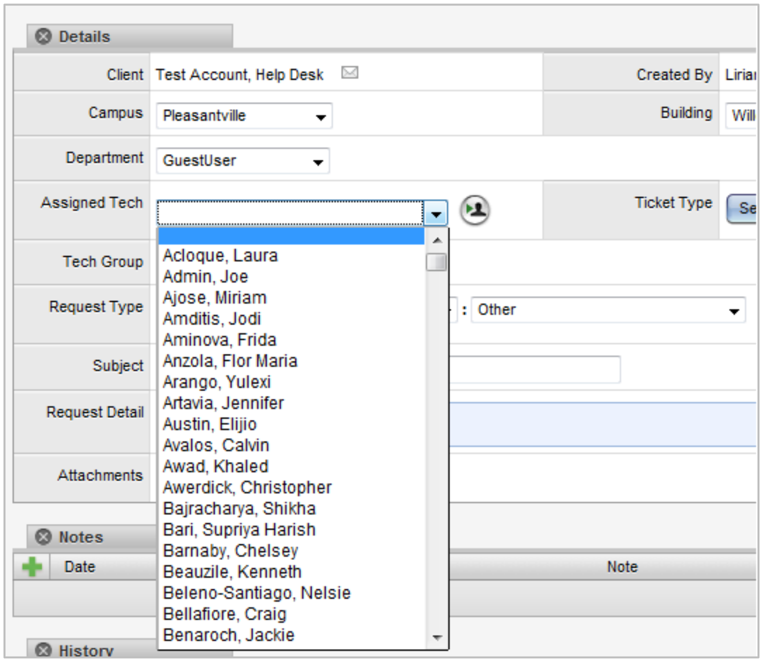


- Scroll down to the **Notes** section and click on the **New** button to create a new note
- Enter the reason why the **Request Type** was changed in the space provided. Make sure to uncheck **Visible To Client**
- Under the **Status & Schedule** section, select the appropriate status from the **Status** drop down menu
- Scroll to the **Recipients** section and verify who will receive e-mail notification
- Click the **Save & Email** button to submit the ticket and e-mail to selected recipients

H. Transferring a Ticket

1. Assigning a Ticket to another Technician within your Tech Group

NOTE: Please make sure to contact the Technician before the ticket is transferred to so they are aware of the request.



- Follow the instructions for searching for a ticket
- Scroll down to the **Details** section and make sure the ticket is set to the correct **Tech Group** and then select a Technician from the **Assigned** Tech drop down menu
- Scroll down to the **Notes** section and click on the **New** button to create a new note
- Enter the reason why the ticket is being transferred in the space provided. Make sure to uncheck **Visible To Client**
- Under the **Status & Schedule** section, select the appropriate status from the **Status** drop down menu
- Scroll to the **Recipients** section and verify who will receive email notification
- Click the **Save & Email** button to submit the ticket

2. Assigning a Ticket to another Technician

NOTE: Please make sure to contact someone in the Tech group before the ticket is transferred to so they are aware of the request.

- Follow the instructions for searching for a ticket
- Scroll down to the **Details** section
- Make desired update in the **Request Type** field

- Scroll down to the **Notes** section and click on the **New** button to create a new note. Enter the reason why the ticket is being transferred in the space provided. Make sure to uncheck **Visible To Client**

- Under the **Status & Schedule** section, select the appropriate status from the **Status** drop down menu
- Scroll to the **Recipients** section and verify who will receive email notification
  NOTE: If you are transferring to a Tech in another department, please make sure to check the "*Tech*" check box so they receive e-mail notification as well.
- Click the **Save & Email** button to submit and **Save & E-mail** the ticket

IV. WEB HELP DESK BEST PRACTICES

Web Help Desk Best Practices
• If you are not sure where a ticket should go, please place it in the Help Desk queue by selecting **Information Technology** > **Other** from the **Request Type** drop down box.
• All tickets should be updated on a **daily basis** so other technicians can track the work completed if needed. Documentation is the key to successful ticket completion!
• Make sure to include details of all steps made in trying to resolve an issue a new **Tech Note** so another technician can pick up where you left off. Clients can also view the progress of their requests without having to speak to anyone.
• Please do note delete a ticket that is created by an end user, if it is mistakenly placed in your group and is not a scope of your job simply move it to the above area: **Information Technology > Other** and *PLEASE DO NOT CLOSE THE TICKET*, instead click **Save**.
• Try to contact a user at least three times (by phone and e-mail) before closing a ticket if they have not responded within a number of days. Closing tickets prematurely will only frustrate the client, which is not good customer service.
• Sorting tickets by the **Alert Level** field will ensure that older tickets are completed first.
• When writing notes or Request Detail information, please write in a professional and courteous manner (complete sentence, grammar, punctuation, etc.)
• **If you have any questions you cannot find the answer to, please contact the ITS Help Desk at (914) 773-3648.**