Assistance and Service Center (ASC) Help Desk
Center for Information Technology Services (CITS)
University of Maryland, Baltimore
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Baltimore, MD 21201
410-706-HELP (4357)

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December 14, 2009

Web Help Desk: Reference Guide

Web Help Desk is the ticket tracking software used by numerous Schools and Departments across campus. This document contains instructions on the following tasks:

Logging into Web Help Desk

In order to log into the Web Help Desk you need to be set up as a Technician. If you are not sure if you have been set up as a Technician, please contact the ASC Help Desk.

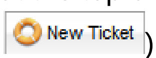
1. Go to http://help.umaryland.edu
2. Log in with your myUMB ID and Password.

   NOTE: You will need to use your self-generated myUMB ID as your user name. The system will not recognize other IDs such as your 14-digit customer number or Employee ID number.

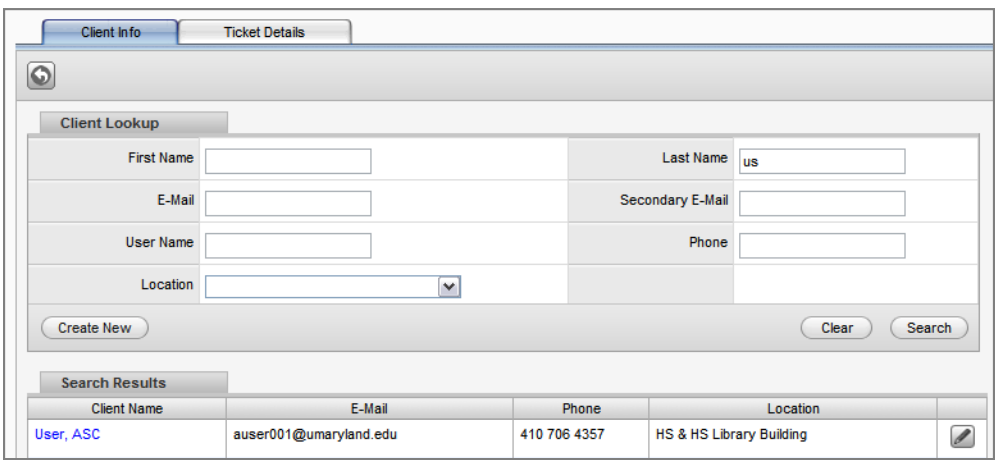
   If you have changed your self-generated myUMB ID, please contact the ASC Help Desk so they can update your Web Help Desk profile.

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

Creating a New Ticket

1. Log into Web Help Desk (http://help.umaryland.edu) with your myUMB ID and password.
2. Click on the **Tickets** icon at the top of the screen.
3. Click on the **New Ticket** (

) button.
4. Search for the Client.
   a. Enter the client's name, email, User Name (myUMB ID), or location and click on the Search button. The * can be used as a wild card in searches.



   b. Click on the **Client's Name** to populate the ticket with the client's information.

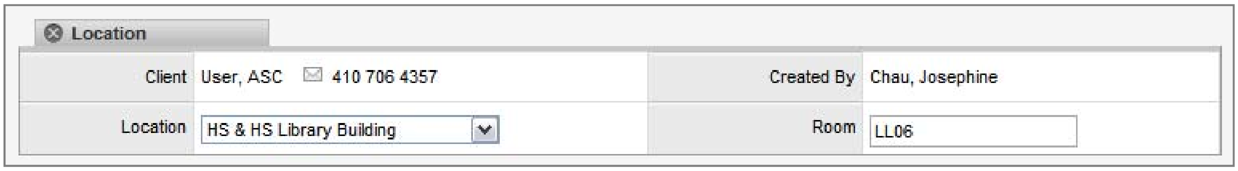
   If there is only one match to your search criteria, the system will automatically load that record.

   If the wrong client was selected, click on 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.

To permanently update a client's contact information in Web Help Desk, please see the "[Editing a Client Record](#)" section of this guide, page 16.

5. Click on the **Ticket Details** tab to enter the ticket information.
6. Scroll to the **Location** section.



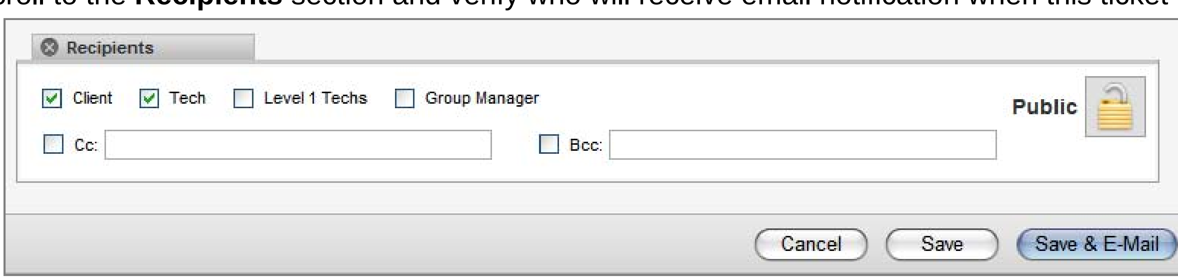
By default, the client's location should be populated from their client record. If needed:

a. Use the drop down menu to select **Location**.
b. Enter the client's **Room**.

7. Scroll down to the **Request Detail** section. Enter the following information:

Request Type	Use the drop down menus to select the appropriate request type
Subject	Enter a summary of the request. This appears in the subject line of the email notification the client and techs receive.
Request Detail	Enter detailed information about the client's request. **NOTE:** This information is visible to the client! Check your spelling and be professional!
Attachments	Currently we advise against using the Attachment feature. Once this becomes available the ASC Help Desk will notify the Web Help Desk users.
Tech Note	Enter information about any troubleshooting you have performed for this request. If you have resolved the issue, check the **Solution** check box. **NOTE:** Unless you *uncheck* the "Visible to Client" option, this information will be visible to clients.
Work Time	Enter the amount of time you have spent on this ticket
Status	Use the drop down menu to select the Status of the ticket. If you have resolved the issue, select the "Resolved" option. Do not select the "Closed" option.

8. Enter information for any **Custom Fields**.
9. Scroll to the **Recipients** section and verify who will receive email notification when this ticket is saved.

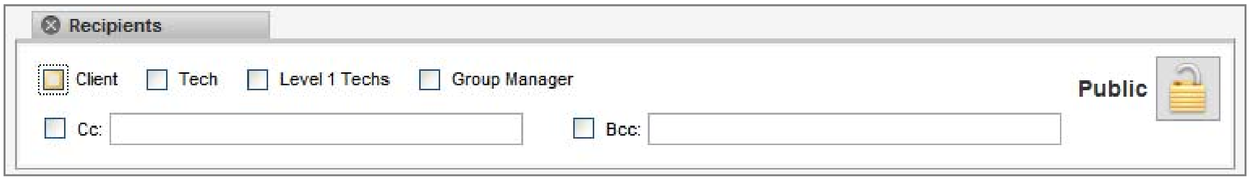


10. Click the **Save & Email** button to submit the ticket.

Using the CC and BCC option

By using the Carbon Copy (Cc:) and Blind Carbon Copy (Bcc:) options in the Recipient area of a Web Help Desk Ticket, you can send email notifications to someone other than the client, tech, or group managers. You can use this feature to send email notifications to individuals that do not have client or technician records in Web Help Desk.

To do this, select the “Cc:” or “Bcc:” fields in the Recipient area of the ticket and enter an email address.



You can enter multiple addresses in the “Cc:“ or “Bcc:” fields by separating the email addresses with a semicolon. For example:

address1@domain.com;address2@domain.com;address3@domain.com

The ticket will keep the Cc: and Bcc: fields populated through the life of the ticket. Remember to uncheck the Cc or Bcc box if future notifications should not be sent to the address or addresses.

Example of Email Notification When a Ticket is Opened

Here is an example of the email message a client receives when a ticket is opened and saved.

ASC User, thanks for contacting the help desk.

We have opened **ticket number 151** for your request.

Once the help desk has resolved the issue, you will receive another email notification.

To check on the status of your ticket, please contact your help desk.

Ticket Info

Ticket No.	151
Report Date	12/11/09 2:02 pm
Reporter	Josephine Chau
Location	HS & HS Library Building
Room	LL06
Tech	Josephine Chau
Status	Open
Request Type	Campus > Campus Exchange > Email > Not Receiving Mail
Subject	Testing UMB Web Help Desk email alerts
Request Detail	Testing email alerts, changed email to hotmail account.

Notes

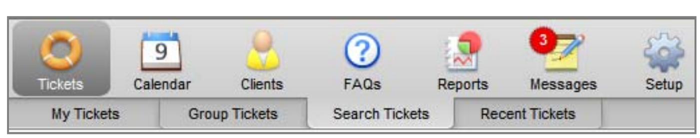
Date	Name	Note Text

Recipients

Josephine Chau
ASC User

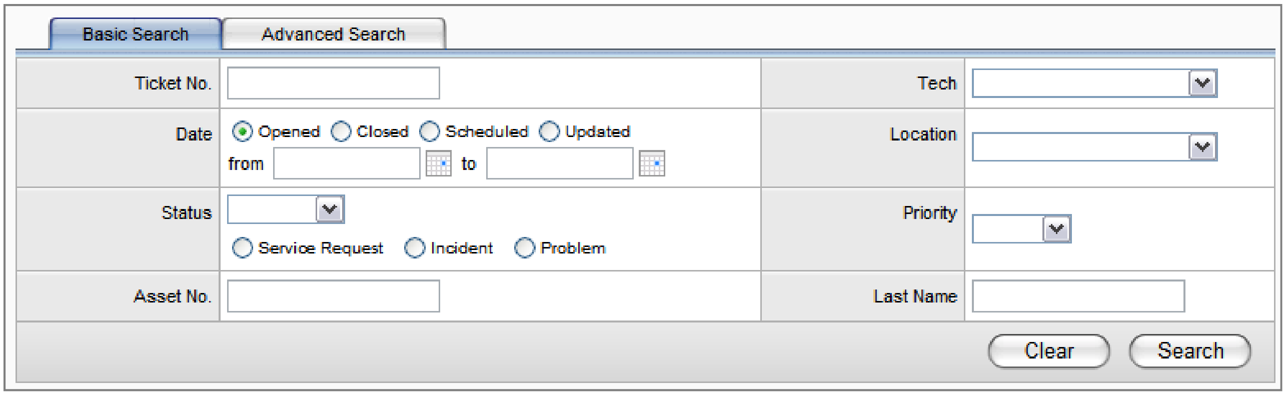
Searching for a Ticket

1. Log into Web Help Desk (http://help.umaryland.edu) with your myUMB ID and password.
2. Click on the **Tickets** icon at the top of the screen
3. Click on the **Search Tickets** tab.



4. Enter your search criteria.

   By default the Basic Search screen appears. You can search by Ticket Number, Dates, Ticket Status, Assigned Tech, Location, Ticket Priority, and the Client's Last Name.



   If you need to refine your search, click on the **Advanced Search** tab. In an Advanced Search you can search for tickets using any ticket fields, including custom fields.

5. Click the **Search** button to perform the search.

   If needed, the search results can be reordered by clicking on the column headers.

6. Click on the link under the Ticket Number (No.) or the Request Detail column to view the ticket.

Finding Tickets Assigned to Me or My Tech Groups

Finding Tickets Assigned to Me

When you log into Web Help Desk the system should show the "My Tickets" screen which shows all open and resolved tickets assigned to you. Here are instructions on how to return to the "My Tickets" Screen.

1. Click on the **Tickets** icon.

2. Click on the **My Tickets** tab.

Finding Tickets Assigned to My Tech Groups

In Web Help Desk, technicians are members of one or more Tech Groups. Here are instructions on how to view tickets assigned to your Tech Group.

1. Click on the **Tickets** icon.

2. Click on the **Group Tickets** tab.

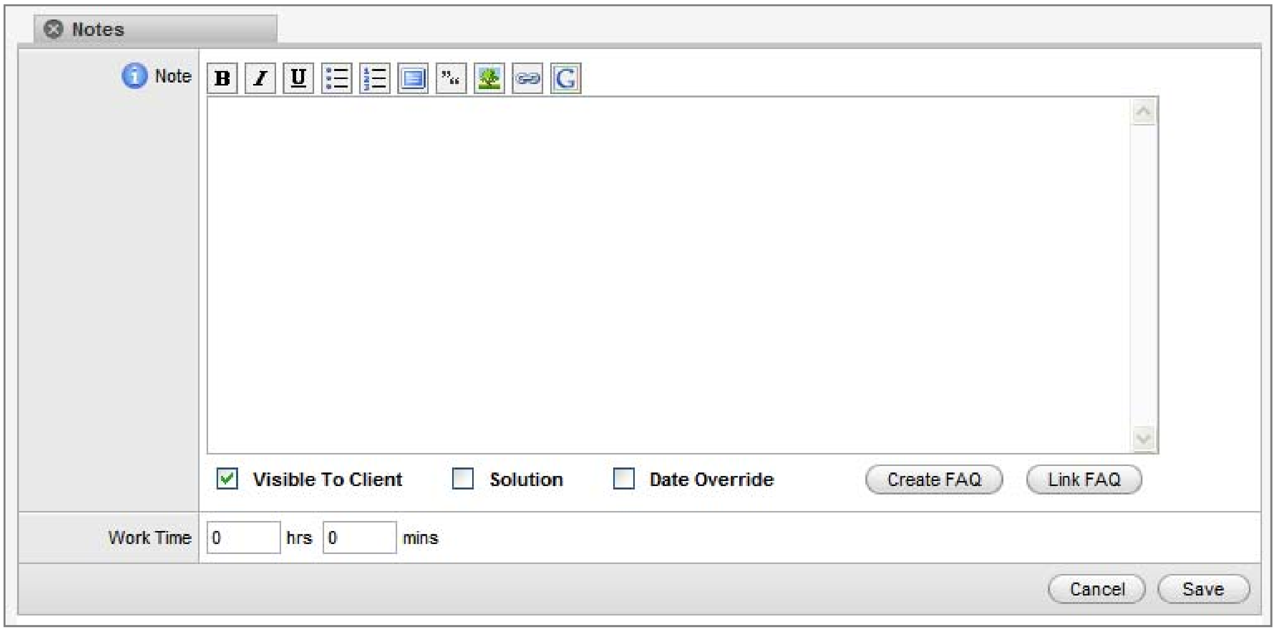
Adding Notes to Tickets

1. Log into Web Help Desk (http://help.umaryland.edu) with your myUMB ID and password.

2. Search for and open a ticket.

3. Scroll down to the **Notes** section.

4. Click on the **New** button to create a new note.

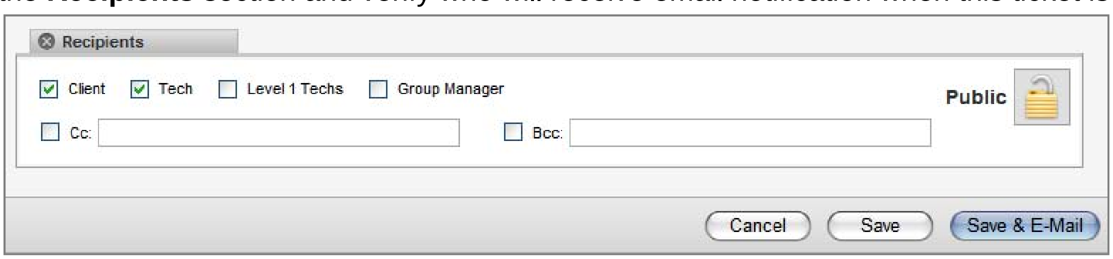


NOTE: Unless you *uncheck* the “Visible to Client” option, this information will be visible to clients.

5. Enter the amount of time you spent in the **Work Time** area.

6. Scroll to the Status & Schedule section. If applicable, use the **Status** drop down menu to update the status of the ticket.

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



NOTE: If you choose to make the note of the ticket <u>not visible</u> to clients, be sure to *uncheck* the option to send the client email notification. If you do not uncheck this option, the client will receive an ‘update’ email with a notes section that does not show a recent update.

8. Click the **Save & Email** button to submit the ticket.

NOTE: If you want to save your progress on a ticket, but do not want to send out email notification, click on the **Save** button.

Adding Multiple Notes

If you need to add multiple notes to a ticket, click on the **Save** button in the Notes area after you complete each note. When you are finished adding notes to the ticket, scroll to the bottom of the page and click on the Save or Save & Email button for the ticket

Color Coding for Notes

The background color of saved notes indicates the following:

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

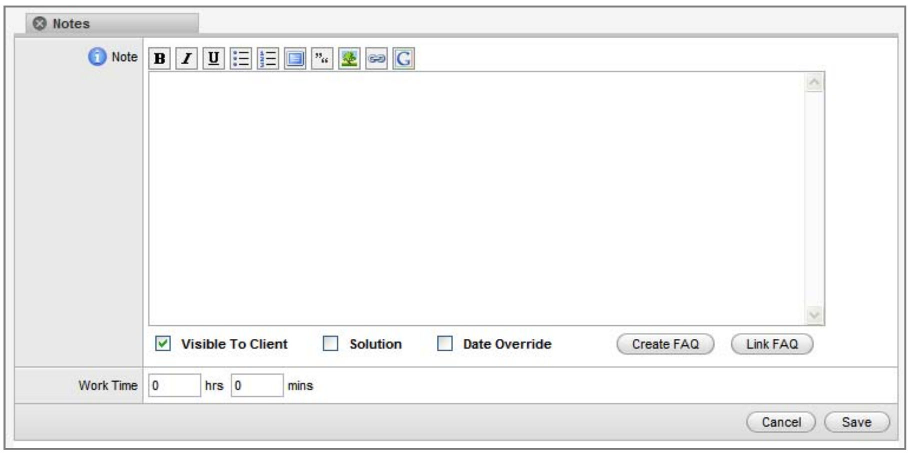
Updating or Modifying a Note

If you need to update or modify a note, click on the link for that note under the "Date" column. Click on the **Save** button in the Notes area to save changes.

Updating the Ticket Status

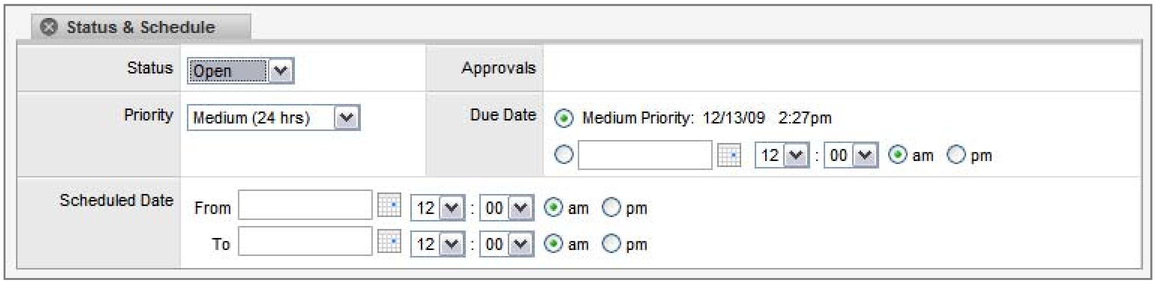
When working on a ticket, be sure to update the ticket status.

1. Log into Web Help Desk (http://help.umaryland.edu) with your myUMB ID and password.
2. Search for and open a ticket.
3. Scroll down to the **Notes** section.
4. Click on the **New** button to create a new note. Enter information on why the ticket status was changed.

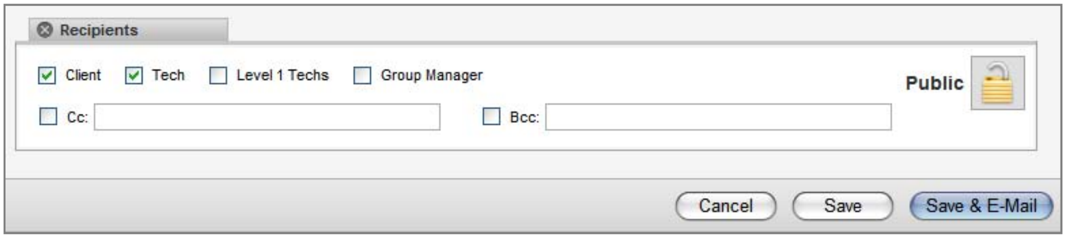


NOTE: Unless you *uncheck* the "Visible to Client" option, this information will be visible to clients.

5. Enter the amount of time you spent in the **Work Time** area.
6. Scroll to the Status & Schedule section. Use the **Status** drop down menu to update the status of the ticket.



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

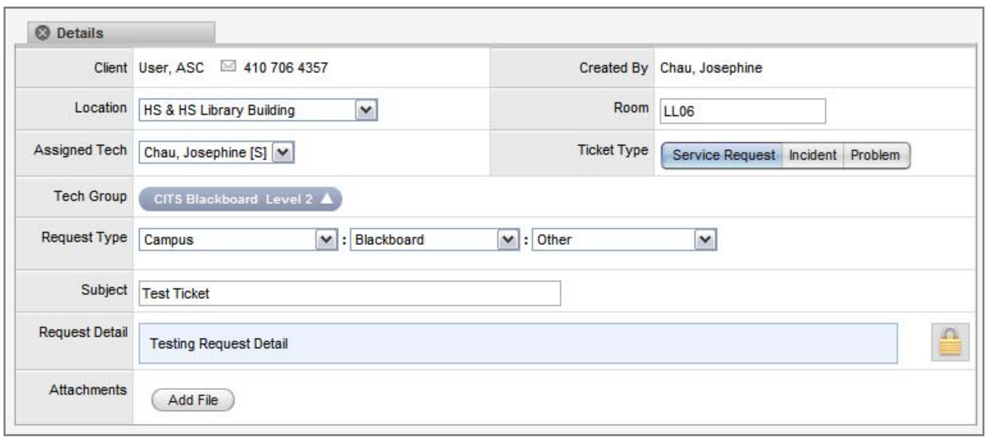


NOTE: When you change the request type, the assigned Tech Group may change as well. Be sure to select the correct recipients who should receive email notification.

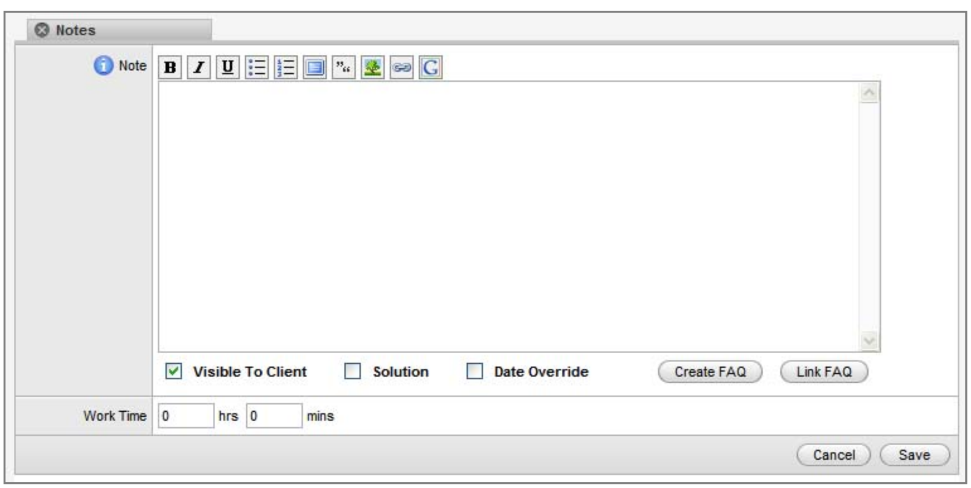
8. Click the **Save & Email** button to submit the ticket.
NOTE: If you want to save your progress on a ticket, but do not want to send out email notification, click on the **Save** button.

Changing Request Types

1. Log into Web Help Desk (http://help.umaryland.edu) with your myUMB ID and password.
2. Search for and open a ticket.
3. Scroll down to the **Details** section.
4. Use the drop down menus to change the **Request Type**.



5. Scroll down to the **Notes** section.
6. Click on the **New** button to create a new note. Enter information on why the Request Type was changed.

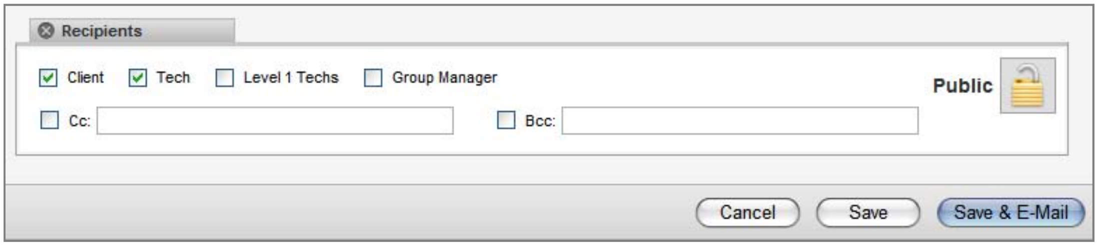


NOTE: Unless you *uncheck* the "Visible to Client" option, this information will be visible to clients.

7. Scroll to the Status & Schedule section. If applicable, use the **Status** drop down menu to update the status of the ticket.

8. Enter the amount of time you spent in the **Work Time** area.

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



NOTE: When you change the request type, the assigned Tech Group may change as well. Be sure to select the correct recipients who should receive email notification.

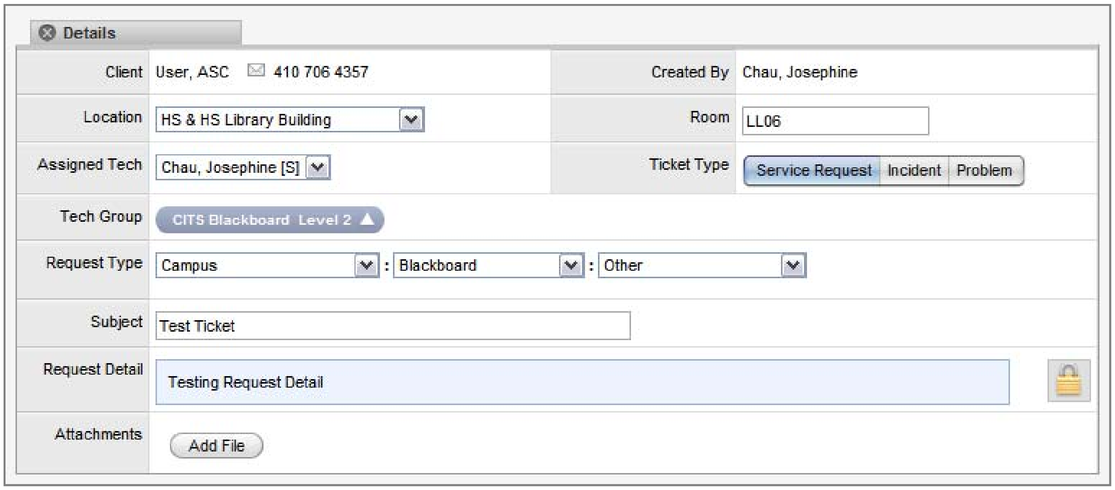
10. Click the **Save & Email** button to submit the ticket.

NOTE: If you want to save your progress on a ticket, but do not want to send out email notification, click on the **Save** button.

Re-assigning the Ticket to a Different Technician

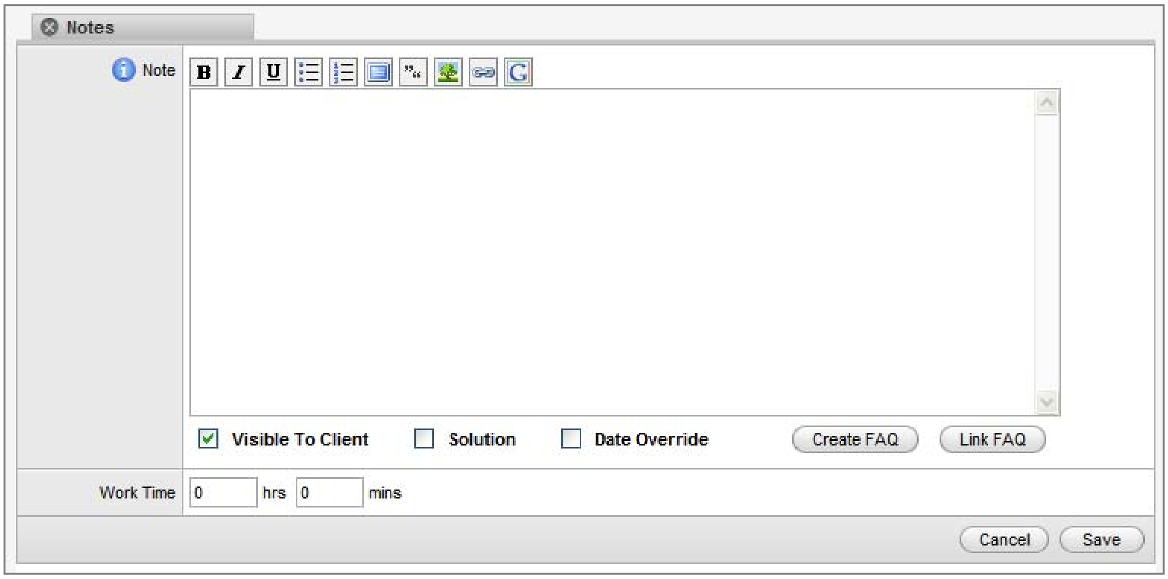
Re-assigning the Ticket to another Technician within the same Tech Group

1. Log into Web Help Desk (http://help.umaryland.edu) with your myUMB ID and password.
2. Search for and open a ticket.
3. Scroll down to the **Details** section.
4. Use the drop down menu to select the new **Assigned Tech**.



5. Scroll down to the **Notes** section.

6. Click on the **New** button to create a new note. Enter information on why the ticket was transferred.

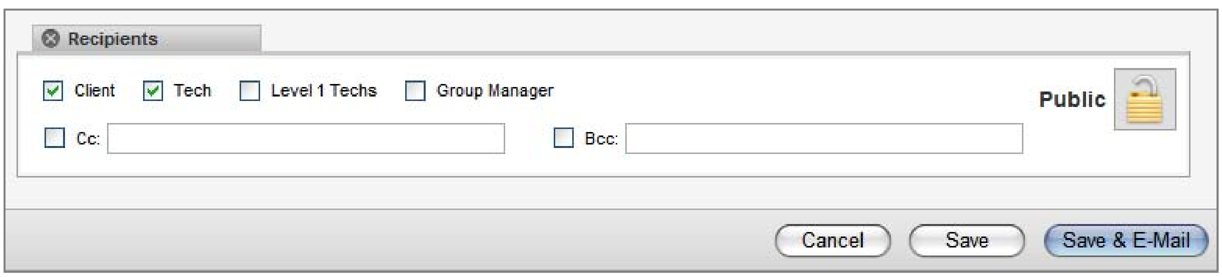


NOTE: Unless you *uncheck* the "Visible to Client" option, this information will be visible to clients.

7. Enter the amount of time you spent in the **Work Time** area.

8. Scroll to the Status & Schedule section. Use the **Status** drop down menu and select the Assigned status.

9. Scroll to the **Recipients** section and verify who will receive email notification.



NOTE: If you choose to make the note of the ticket not visible to clients, be sure to *uncheck* the option to send the client email notification of this change.

If you do not uncheck this option, the client will receive an 'update' email with a notes section that does not show a recent update.

10. Click the **Save & Email** button to submit the ticket.

Escalating the Ticket

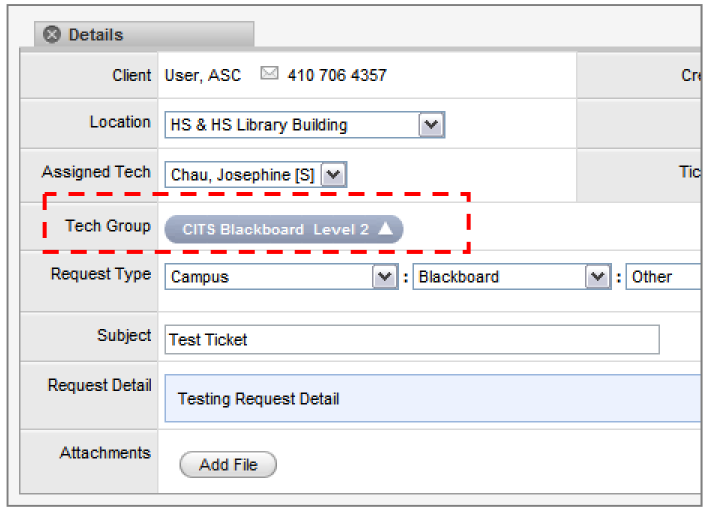
1. Log into Web Help Desk (http://help.umaryland.edu) with your myUMB ID and password.

2. Search for and open a ticket.

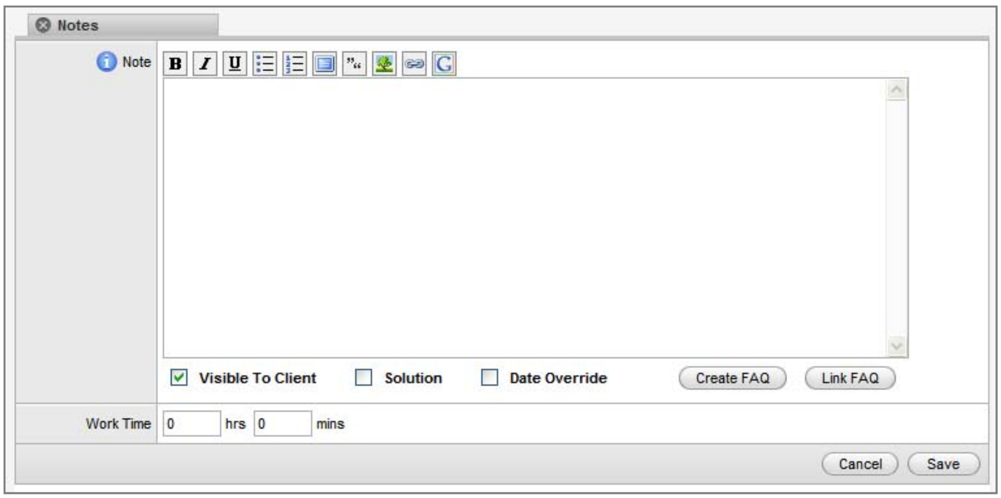
3. Scroll down to the **Details** section.

4. Click on the **Escalate Ticket** button next to the **Tech Group** area.

5. Scroll down to the **Notes** section.

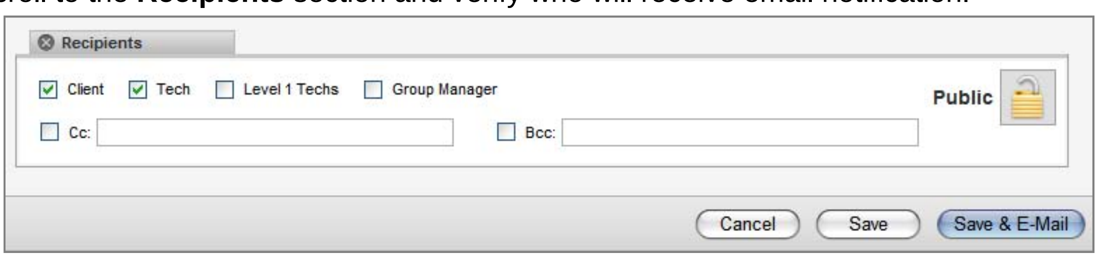


6. Click on the **New** button to create a new note. Enter information on why the ticket was escalated.



NOTE: Unless you *uncheck* the "Visible to Client" option, this information will be visible to clients.

7. Enter the amount of time you spent in the **Work Time** area.
8. Scroll to the Status & Schedule section. Use the **Status** drop down menu and select the 'Assigned' status.
9. Scroll to the **Recipients** section and verify who will receive email notification.



NOTE: If you choose to make the note of the ticket <u>not visible to clients</u>, be sure to *uncheck* the option to send the client email notification of this change.

If you do not uncheck this option, the client will receive an 'update' email with a notes section that does not show a recent update.

10. Click the **Save & Email** button to submit the ticket.

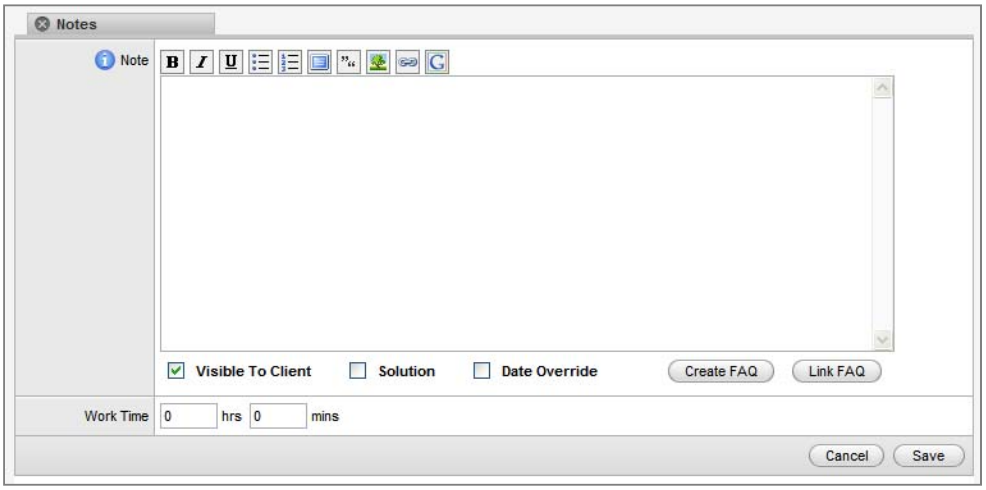
Re-assigning the Ticket to another Tech Group

Since different Tech Groups support different products, you must change the Request Type of the ticket if you want to assign it to another tech group.

1. Log into Web Help Desk (http://help.umaryland.edu) with your myUMB ID and password.
2. Search for and open a ticket.
3. Scroll down to the **Details** section.
4. Update the Request Type of the ticket.

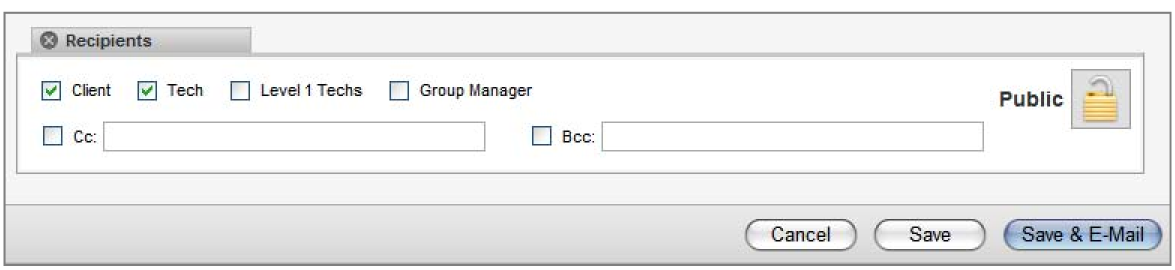
   The **Tech Group** should change automatically.

5. Scroll down to the **Notes** section.
6. Click on the **New** button to create a new note. Enter information on why the ticket was transferred.



   NOTE: Unless you *uncheck* the "Visible to Client" option, this information will be visible to clients.

7. Enter the amount of time you spent in the **Work Time** area.
8. Scroll to the Status & Schedule section. Use the **Status** drop down menu to select the 'Assigned' status.
9. Scroll to the **Recipients** section and verify who will receive email notification when this ticket is saved.



   NOTE: If you choose to make the note of the ticket not visible to clients, be sure to *uncheck* the option to send the client email notification of this change.

   If you do not uncheck this option, the client will receive an 'update' email with a notes section that does not show a recent update.

10. Click the **Save & Email** button to submit the ticket.

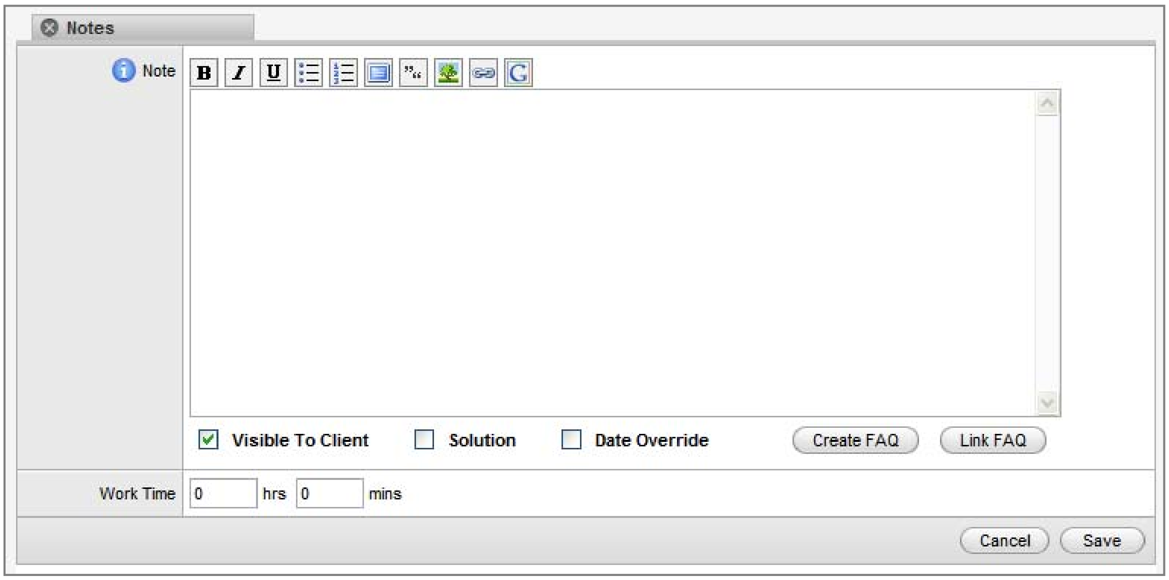
Resolving a Ticket

1. Log into Web Help Desk (http://help.umaryland.edu) with your myUMB ID and password.

2. Search for and open a ticket.

3. Scroll down to the **Notes** section.

4. Click on the **New** button to create a new note. Enter the information on how the issue was resolved.



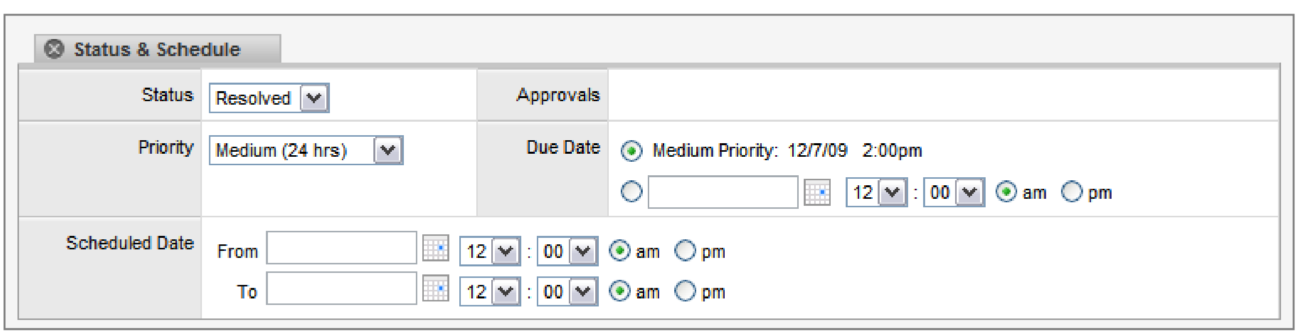
NOTE: Unless you *uncheck* the "Visible to Client" option, this information will be visible to clients. However, in most cases you will want the resolution for a ticket to be visible to the client.

5. Click the **Solution** check box.

6. Enter the amount of time you spent in the **Work Time** area.

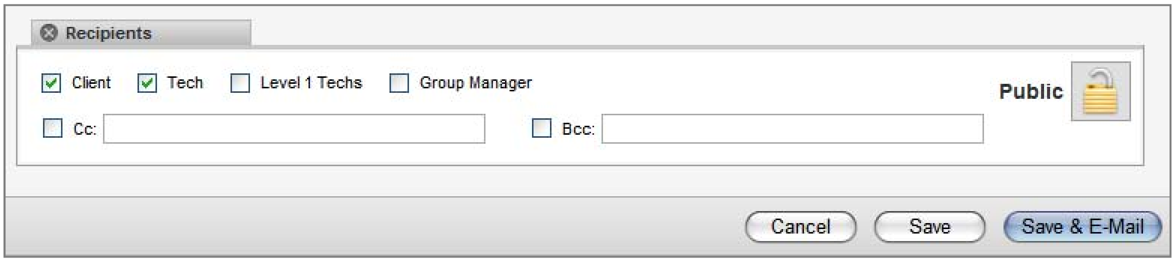
7. Scroll down to the **Status** section.

8. Change the Status type to **Resolved**. <u>Do not</u> use the Closed Status.



The system will change the status of "Resolved" tickets to "Closed" after a certain amount of time.

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



NOTE: If you choose to make the resolution note of the ticket <u>not visible to clients</u>, be sure to *uncheck* the option to send the client email notification.

If you do not uncheck this option, the client will receive a 'ticket resolved' email without information on how this ticket was resolved.

10. Click the **Save & Email** button to submit the ticket.

Example of Email Notification Sent When a Ticket is Resolved

ASC User, thank you for using the help desk.

Ticket number 151 has been resolved.

If you have any questions or concerns about this ticket, please contact your help desk.

Ticket Info

Ticket No.	151
Report Date	12/11/09 2:02 pm
Reporter	Josephine Chau
Location	HS & HS Library Building
Room	LL06
Tech	Josephine Chau
Status	Resolved
Request Type	Campus > Campus Exchange > Email > Not Receiving Mail
Subject	Testing UMB Web Help Desk email alerts
Request Detail	Testing email alerts, changed email to hotmail account.

Notes

Date	Name	Note Text
12/11/09 2:25 pm	Chau, Josephine	Changed email back to umaryland address

Recipients

Josephine Chau
ASC User
Test Auser III

Managing Clients

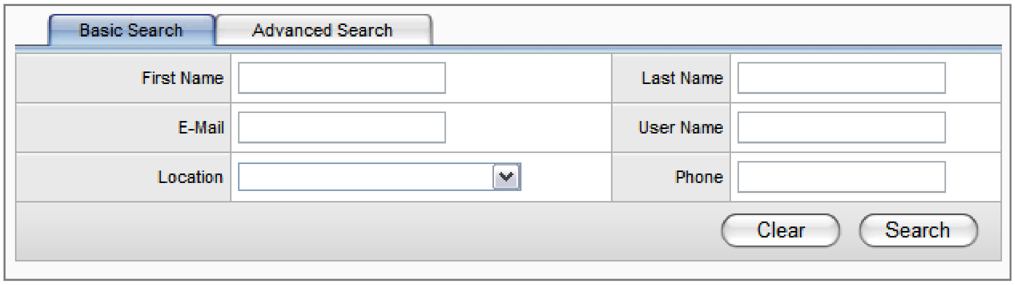
Most of the client information in Web Help Desk is updated via the myUMB Directory. The myUMB Directory synchronizes with Web Help Desk once a day, around 2 or 3 AM.

If a client is a new student or employee, their Web Help Desk client account will be created automatically when their myUMB Directory account is activated.

If needed, a client record can be created for individuals who are not part of the myUMB Directory. These manually created records are not updated by the myUMB Directory.

Searching for a Client Account

1. Click on the **Clients** icon.
2. Select the Basic Search of Advanced Search tab and enter the client's name, email address, or user name.



3. Click on the Search button to find the client's account.
4. Click on the client's name in the **Client Name** column to open the client's account.

Generic Client Accounts

3 generic accounts have been set up in Web Help Desk. These accounts can be used if a UMB student, staff, or faculty member does not have a Web Help Desk Client account created yet.

- umbstudent
- umbstaff
- umbfaculty

Using Wild Cards to find a Client Record

The * can be used as a wild card in searches. Here are a few examples of using a wild card in a Last Name search:

*user	Will find all client accounts ending with 'user'
User*	Will find all client accounts starting with 'user' with any number of letters afterwards.
user	Will find all client accounts that start with any number of letters, have the string 'user', followed by any number of letters afterwards.

Identifying Client Record Source

You can identify the whether a client record was created by the myUMB Directory or was created manually by checking the **Client Info** screen on a client record. Access the Client Info page by searching for and opening a client record.

myUMB Directory Record

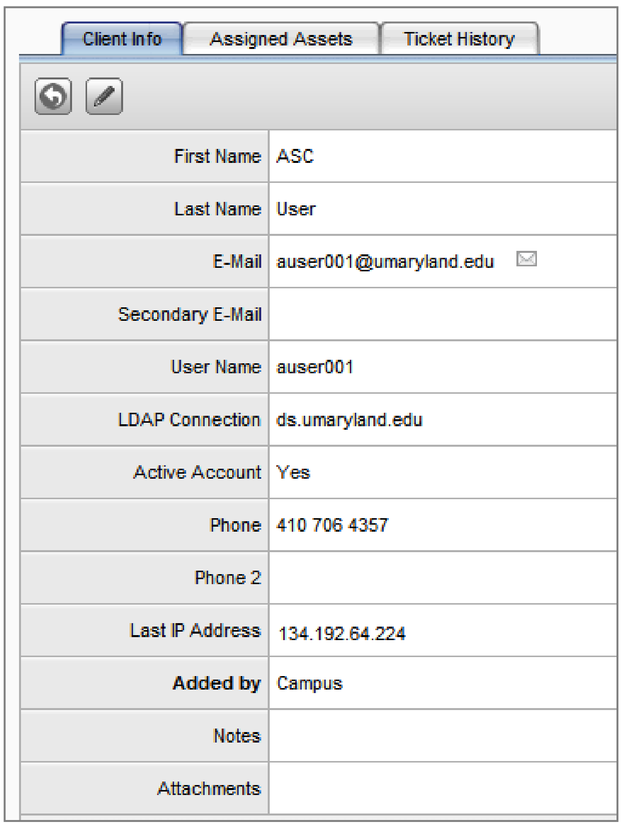
A client record created by the myUMB Directory will have a "LDAP Connection" entry.

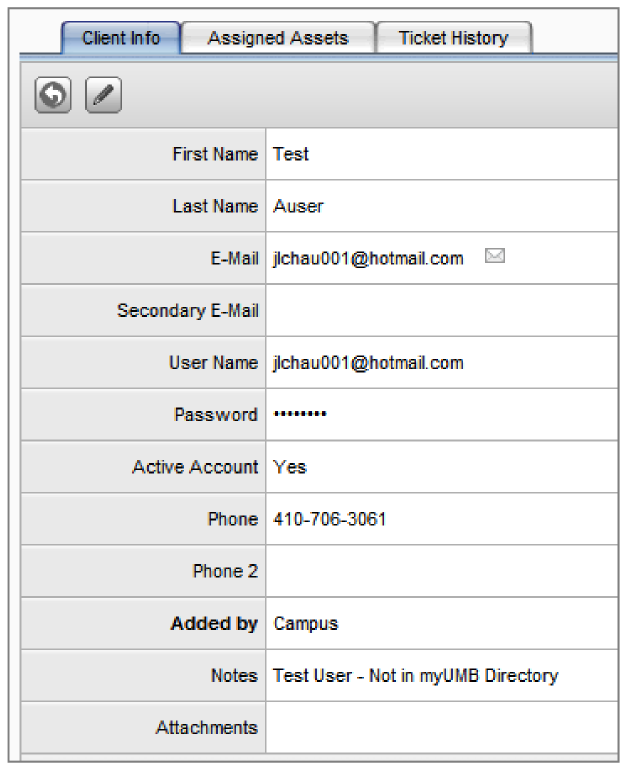
The Password option is not present since the password is managed by the myUMB Directory.

Manually Created Record

A manually created (non-directory) record does not have an "LDAP Connection" option.

A manually created record has a "Password" field available since the login is not managed by the myUMB Directory.





Editing a Client Record

If the client record was loaded from the myUMB Directory, remind the client to update their contact information on their employee, student or affiliate records.

- Employees can use the myUMB Portal Self Service to update their campus contact information.
- Affiliates can user the myUMB Portal Self Service or contact the ASC Help Desk with updates to their Affiliate Records.

Updates made to the Web Help Desk Client Record may not be permanent, unless that information is also changed in the myUMB Directory.

The next time the Web Help Desk record is synchronized with the myUMB Directory, the information you manually changed in Web Help Desk will be overwritten by what is listed in the myUMB Directory.

Updating a Non-myUMB Directory Record

If you are updating a non-myUMB directory record, updates will not be overwritten by the myUMB Directory synchronization. Here are instructions on how to update a non-myUMB Directory client record:

1. Click on the **Clients** icon at the top of the screen.

   Perform a search for the client by entering the client's name, email address or user name and click on the **Search** button.

2. Click on the client's name under the **Client Name** column to open their record.
3. Click on the **Edit Client** button () to edit the client's information.
4. Update the client's information.
   NOTE: Some values such as User Name and email address must be unique. If another client is already using the username or email address, Web Help Desk will not allow you to save the changes.

   The following values are also required. Web Help Desk will not allow you to save a record if it is missing these values:
   - First Name
   - Last Name
   - User Name
   - Email Address

5. Click on the "Save" button to save the changes to this non-myUMB Directory client record.

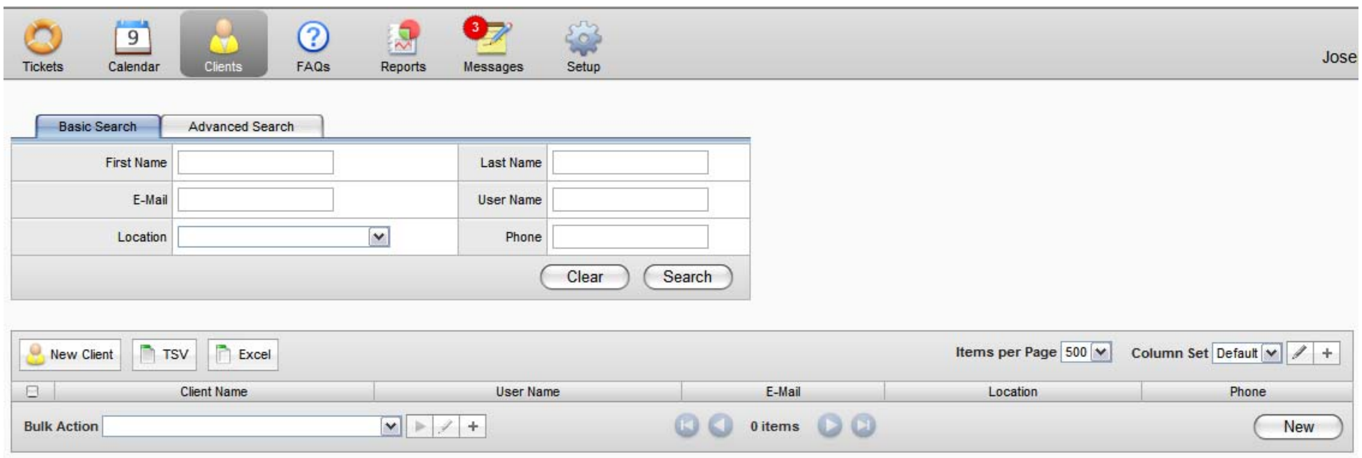
Adding a Client Manually

To keep the client database organized, please *thoroughly search* for a client before adding them manually to the Web Help Desk.

If you cannot find an existing record for a client, and the client will not have a record added to Web Help Desk through the myUMB Directory in the near future, here are instructions on how to create a client account manually.

1. Click on the **Clients** icon at the top of the screen.
   Perform a search for the client by entering the client's name, email address or user name and click on the **Search** button.

2. If you cannot find an existing record for the user, click on the **New** button.



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3. Enter the following information for the new client in the Client Info window.

First Name	This information is required. Enter the client's first name.
Last Name	This information is required. Enter the client's last name.
E-Mail	This information is required. Enter the client's email address. **NOTE:** This value must be unique. If the email address is already being used in the Web Help Desk system, you will receive an error message when trying to save the record.
User Name	This information is required. Enter the client's **email address** as the username. **NOTE:** This value must be unique. If the username is already being used in the Web Help Desk system, you will receive an error message when trying to save the record.
Password	Select the **Random** option.
Active Account	Ensure that the Active Account box is checked.
Phone	Enter the client's phone number with the format xxx-xxx-xxxx Example: 410-706-4357
Added by	This information is required. Select the group that you belong to.
Notes	If needed, add information about the client. This field is optional and is not required to create a new client record.
Attachments	At this time, we are not using the Attachment feature when manually creating a client record.

Expand the **Help Desk Location** section. Enter the following information

Location	If applicable, use the drop down menu to select the client's campus location
Room	If applicable, use the drop down menu to select the client's room

4. Click on the **Save** button.