USER GUIDE

Unit 3: Assist™

Chapter 3: Using Assist

Schoolwires Synergy™ & Assist
Version 1.2

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Introduction

***Schoolwires* Assist** provides an efficient, fully web-based application for requesting, tracking and fulfilling work requests—from changing a light bulb to trouble-shooting a computer problem. **Assist** automates work flow to improve productivity and allow anyone involved in the process to easily monitor and track service online.

Audience and Objectives

This chapter should be read by all **Assist** users. It covers how to submit, approve, manage and complete tickets in **Assist**.

In this chapter, you will learn to:

- Submit and edit requests in the *My Tickets* window as a requestor.
- Submit and edit requests in the *My Tickets* window as a manager or technician.
- Submit and edit recurring requests in the *My Tickets* window as a manager or technician.
- Find tickets.
- Approve and deny tickets in the *Approval Queue* window as an approver.
- Edit tickets as a manager or technician in the *Service Tickets* window. This includes:
    - Changing the information
    - Changing the priority
    - Entering a due date
    - Assigning a ticket
    - Changing the status
    - Closing a ticket
    - Cancelling a ticket
- View the assignment calendar as a manager or technician.
- Generate reports as a requestor, manager, approver or technician.

Before You Begin

All Users

If you have not already done so, ***Schoolwires*** recommends that you read the Framework for **Synergy** & **Assist** chapter, "Navigating in **Synergy** & **Assist**." It covers signing in and general navigation, including hover menus, click menus and grid functions. Changing your user account information, including your password is also covered in that chapter.

Members of Support Staff

In addition, if you are assigned as a manager, technician or approver, we recommend that you read the **Assist** chapter, "**Assist** Relationships for Support Staff." That chapter will help you understand the relationships that must be established for the efficient and effective operation of **Assist**.

User Views of My Workspace

As you may have read in the **Assist** chapter, "**Assist** Relationships for Support Staff," users are assigned user profiles within *Users & Groups*. The permissions within their profiles specify the permissions they will have when they sign in to **Assist** and its related systems of *Users & Groups* and *Buildings & Locations*.

The permissions that are available for user profiles in **Assist** and its related systems are shown in Figure 1. You can create profiles with as many of these permissions as required to meet your organization's needs.

Figure 1: Permissions in user profiles

As you can see from Figure 1, the permissions specific to working in **Assist** are:

- Assign tickets.
- Cancel tickets.
- Create recurring requests.
- Manage assets.
- Manage queues.
- Manage settings and staff.
- Manage categories and subcategories.
- Submit requests.

Most **Assist** users will be able to submit requests. Based on their user profiles, managers and technicians may also be able to assign and cancel tickets, and create recurring requests. Approvers cannot assign or cancel tickets, or create recurring requests.

In addition to the permissions in their user profiles, support staff members also have permissions that are related to their roles on the support staff. These do not depend on the permissions in their user profiles. Roles for support staff members are assigned on the *Support Staff* tab in the *Settings* window in **Assist** *Administration* as shown in Figure 2. See the **Assist** chapter, "**Assist** Administration," for more information.

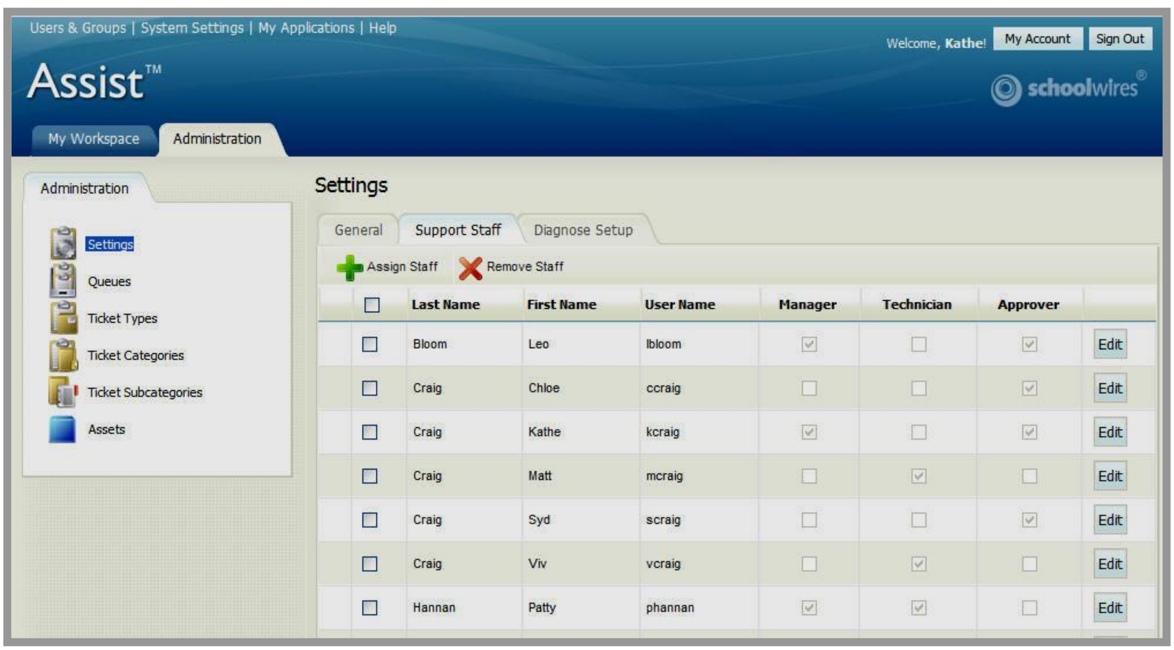


Figure 2: Settings window: Support Staff tab

The tasks that are available on the *My Workspace* tab of **Assist** will vary based on the permissions of each user. In this chapter, we will cover all the tasks or work areas that may be available after you sign in.

Setup for This Chapter

For this chapter we have set up users with the following roles and assigned to the Middle School East:

- Requestor: Lindsey
- Manager: Craig
- High-level Technician: Viv
- Low-level Technician: Patrick
- Approvers: Chloe (Level 1) and Syd (Level 2)

We assigned both technicians to Manager Craig. We created an approval queue for major PC work and a standard queue for minor PC work.

We assigned Craig, Viv and Patrick to both queues as support staff and assigned Chloe and Syd as approvers for the approval queue.

We have set up three subcategories within the Technology ticket type and the Computer category. The subcategories were assigned as follows:

- Tickets for the Computers—PC Major subcategory will be assigned to the Computers: PC Major approval queue.
- Tickets for the Computers—PC Minor subcategory will be assigned to Technician Patrick.
- Tickets for the PC Troubleshooting subcategory will be assigned to the Computers: PC troubleshooting standard queue.

A Requestor's View

The user profile that we assigned to Requestor Lindsey is shown in Figure 3. As you can see, the only permission this user has is to submit requests. Since she has not been assigned as a member of the support staff, this is her only permission within **Assist**.

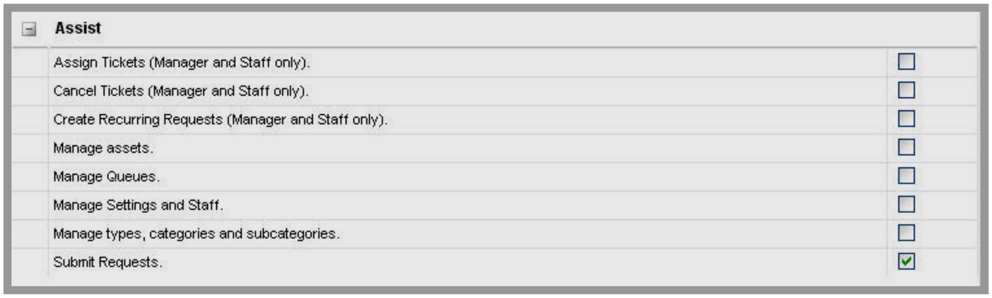


Figure 3: User profile assigned to requestor

As shown in Figure 4, the only task available on the *My Workspace* tab to a user with permissions similar to Lindsey is access to *My Tickets*, which will display only tickets submitted by or for Lindsey.

Notice that when Requestor Lindsey signs in, the *My Tickets* window will display.

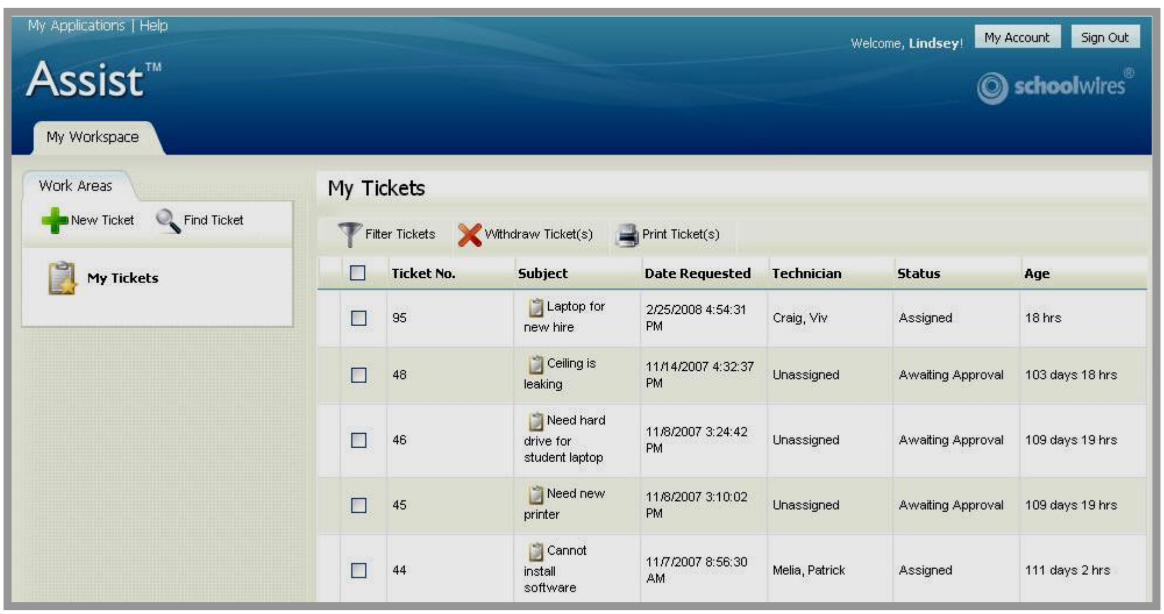


Figure 4: My Tickets workspace for a requestor

See "My Tickets" later in this chapter for more information on submitting tickets. See "Reports" later in this chapter for more information on how to obtain reports and the reports that are available to requestors.

A Manager's View

The user profile we assigned to Manager Craig is shown in Figure 5.

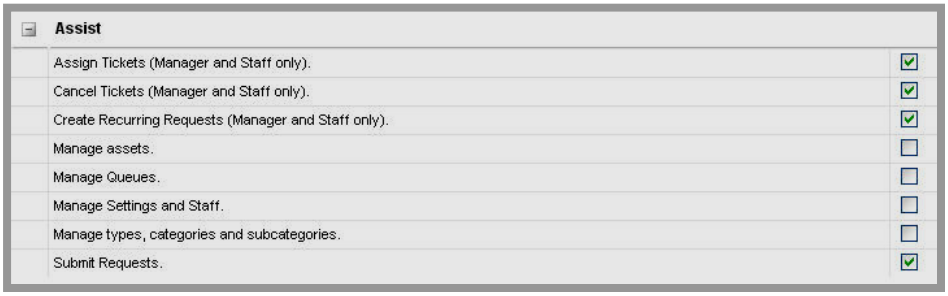


Figure 5: User profile for manager on support staff

As you can see, in addition to being able to submit tickets just as any other requestor can, this user can:

- Assign tickets.
- Cancel tickets.
- Create recurring requests.

User profiles, of course, give you the flexibility to set up a manager with as many of these permissions as suit your organization.

<u>Note</u>: In order for a manager to be able to add recurring tickets, that user's profile must contain both the permission to create recurring requests <u>and</u> the permission to submit requests. A requestor who is not a manager or technician cannot submit recurring tickets.

Since Craig is a member of the support staff as well as a requestor, when he signs in, a *By Technician* tab of the *Service Tickets* window like the one shown in Figure 6 will display. In addition to the permissions in his user profile, he has permissions associated with his role as a manager on the support staff.

Figure 6: My workspace tab for manager on support staff

From here, he can navigate to the other tasks that are available to him, namely:

- *My Tickets*, which will display only tickets submitted by or for Craig.
- *Assignment Calendar*, which will display all tickets with due dates that are assigned to Craig and any technicians assigned to him.
- *Reports*, which will give Craig access to the reports available to managers.

Since the *Cancel Tickets* button is available within the *Service Tickets* window, you can see that he has this permission in his user profile. The *Assign Tickets* button is also available to Craig on the *By Queue* tab. See "Service Tickets (Managers and Technicians)" later in this chapter for more information on processing tickets, including assigning and cancelling tickets. Creating recurring tickets is covered in "My Tickets." See "Reports" later in this chapter for more information on how to obtain reports and the reports that are available to managers.

Technicians' Views

We set up a high-level technician, whose user profile, as you will see, contains the same permissions as Manager Craig. We have also set up a low-level technician, whose user profile has the same permissions as Requestor Lindsey.

You might set up technicians with a user profile having some, but not all of the same permissions in the user profile as a manager. With user profiles, you have this flexibility.

A High-Level Technician's View

Perhaps a technician is the only member or the most qualified member of the support staff in a building in which there is no manager. As a result, you might want that technician to be able to assign and cancel tickets as well as to create recurring tickets. The profile we assigned to Technician Viv, the high-level technician, is shown in Figure 7 and contains those permissions.

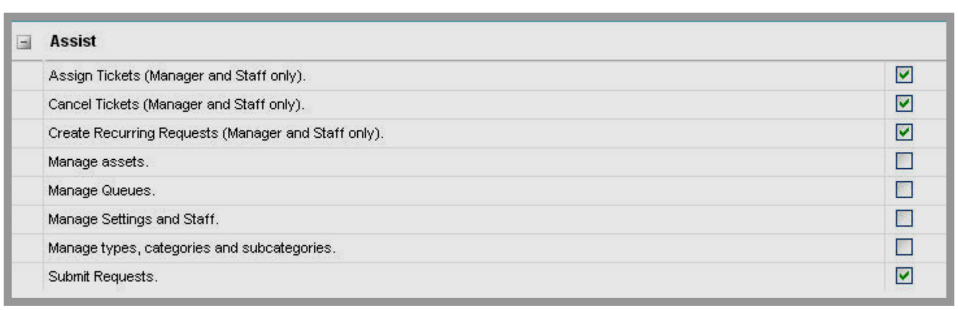


Figure 7: User profile for high-level technician on support staff

As you can see, in addition to being able to submit tickets just as any requestor can, this user can:

- Assign tickets.

- Cancel tickets.
- Create recurring requests.

Note: In order for a technician to be able to add recurring tickets, that user's profile must contain both the permission to create recurring requests and the permission to submit requests. A requestor who is not a manager or technician cannot submit recurring tickets.

Since Viv is a member of the support staff as well as a requestor, when she signs in, a *By Technician* tab of the *Service Tickets* window like the one shown in Figure 8 will display. In addition to the permissions in her user profile, she has permissions associated with her role as a technician on the support staff.

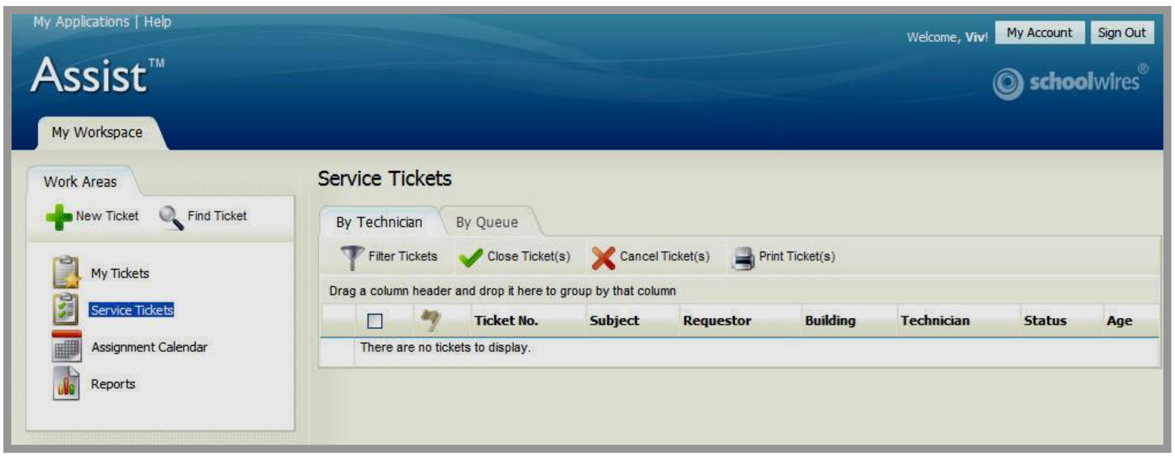


Figure 8: My Workspace tab for high-level technician on support staff

From here, she can navigate to the other tasks that are available to her, namely:

- *My Tickets*, which will display only tickets submitted by or for Viv.
- *Assignment Calendar*, which will display only those tickets assigned to Viv that have due dates.
- *Reports*, which will give Viv access to the reports available to technicians.

Since the *Cancel Tickets* button is available within the *Service Tickets* window, you can see that she has this permission. The *Assign Tickets* button is also available to Viv on the *By Queue* tab. See "Service Tickets (Managers and Technicians)" later in this chapter for more information on processing tickets, including assigning and cancelling tickets. Creating recurring tickets is covered in "My Tickets." See "Reports" later in this chapter for more information on how to obtain reports and the reports that are available to technicians.

A Low-Level Technician's View

The user profile we assigned to Technician Patrick, the low-level technician, is shown in Figure 9. As you can see, the only permission he obtains from this profile is being able to submit work requests. This is the same permission we assigned Requestor Lindsey when we applied a user profile to her. Consequently, the tasks this low-level technician can perform as a member of the support staff in **Assist** are solely related to his role as a technician.

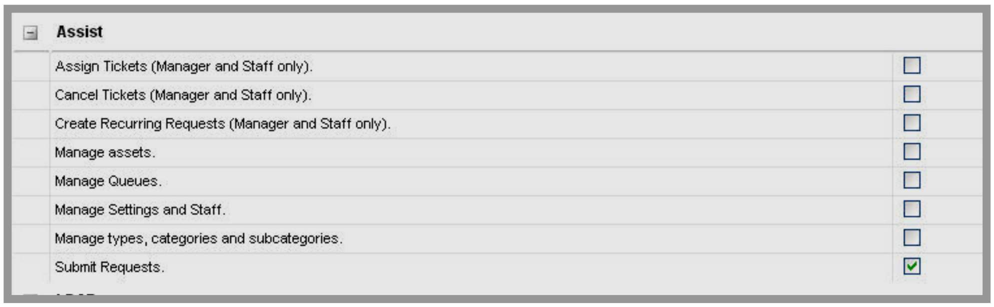


Figure 9: User profile for low-level technician on support staff

As you can see, unlike Requestor Lindsey, when Technician Patrick signs in to **Assist**, a *By Technician* tab of the *Service Tickets* window like the one shown in Figure 10 will display.

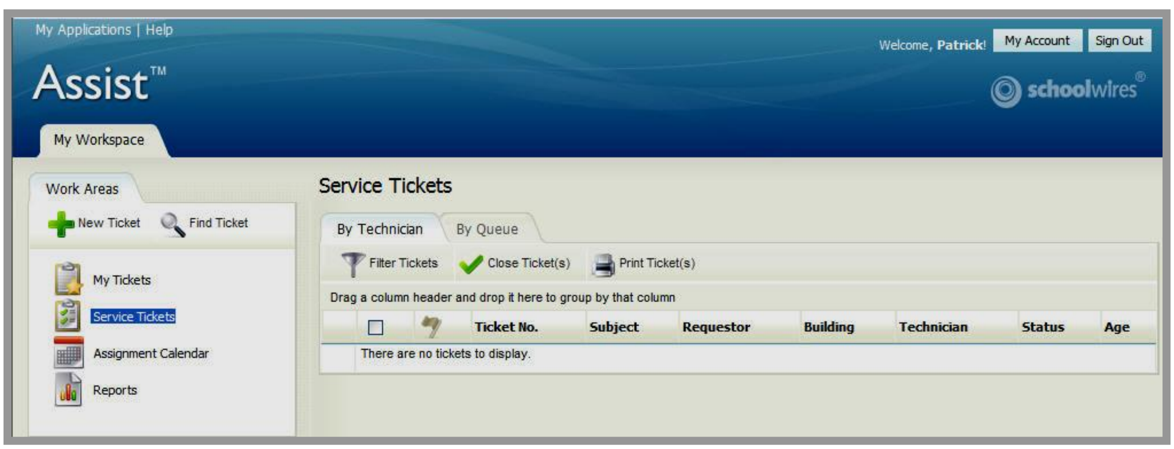


Figure 10: My Workspace tab for low-level technician on support staff

Like Manager Craig and Technician Viv, from here, he can navigate to the other tasks that are available to him, namely:

- *My Tickets*, which will display only tickets <u>submitted by or for Patrick</u>.
- *Assignment Calendar*, which will display only those tickets <u>assigned to Patrick that have due dates</u>.
- *Reports*, which will give Patrick access to the reports available to technicians.

Unlike Manager Craig and Technician Viv, however, Technician Patrick does not have the *Cancel Tickets* button available within the *Service Tickets* window. On the *By Queue* tab, he does not have the *Assign Tickets* button and he cannot create recurring tickets. See "Service Tickets (Managers and Technicians)" later in this chapter for more information on processing tickets. See "Reports" later in this chapter for more information on how to obtain reports and the reports that are available to technicians.

An Approver's View

The user profile we assigned to the approvers (Chloe and Syd), is shown in Figure 11.

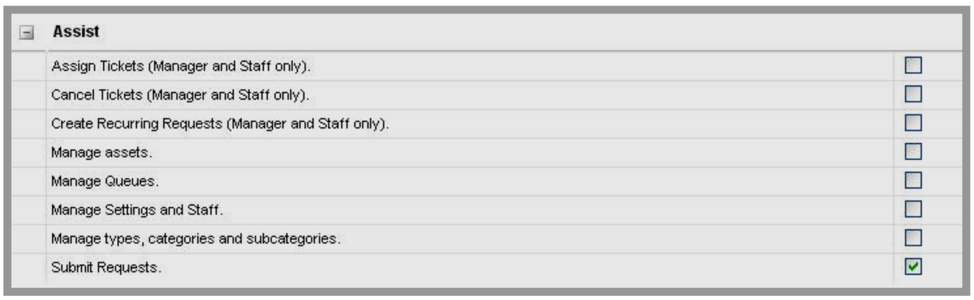


Figure 11: User profile for approvers on support staff

As you can see, the only permission they obtain from this profile is being able to submit requests. This is the same permission we assigned Requestor Lindsey and Technician Patrick when we applied user profiles to them. Consequently, the tasks these approvers can perform as members of the support staff in **Assist** are solely related to their roles as approvers. Since they have no access to the *Service Tickets* window, approvers cannot assign or cancel tickets, or create recurring tickets.

As you can see, unlike Requestor Lindsey, Technician Patrick or Manager Craig, when one of the approvers signs in to **Assist**, an *Approval Queue* window like the one shown in Figure 12 will display.

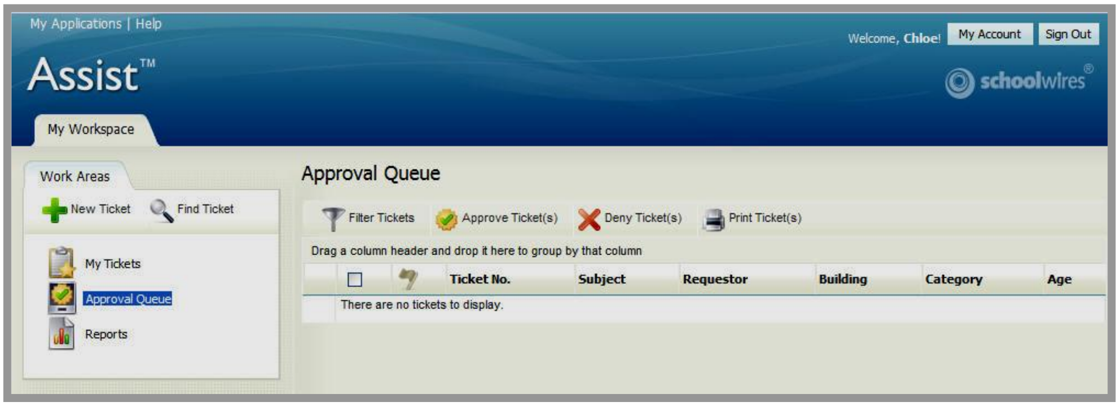


Figure 12: My Workspace tab for an approver on support staff

From here, the approvers can navigate to other tasks available to them, specifically:

- *My Tickets*, which will display only tickets <u>submitted by or for the approver who is signed in</u>.
- *Reports*, which will give them access to the reports available to approvers.

Because of the user profiles assigned to them, these approvers cannot assign tickets or cancel tickets, or submit recurring requests. See "Approval Queue (Approvers)" for more information about approving and denying tickets. See "Reports" later in this chapter for more information on how to obtain reports and the reports that are available to approvers.

My Tickets Window

As mentioned earlier in this chapter, most users of **Assist** will be able to submit tickets. All users who have this permission within their user profiles will have the *My Tickets* and *Reports* tasks available to them in the navigation pane of the *My Workspace* tab of **Assist**.

If a user is also assigned as a member of the support staff, other tasks will display in the navigation pane. What those tasks are and which one will display when a staff member first signs in depends on the support staff role that user is assigned.

Whether a user is a member of the support staff or not, *the tickets that display in My Tickets are only those that have been submitted by or for the user who is signed in.*

Figure 13 shows the *My Workspace* tab for Requestor Lindsey. She enters in the *My Tickets* window as shown in Figure 13.

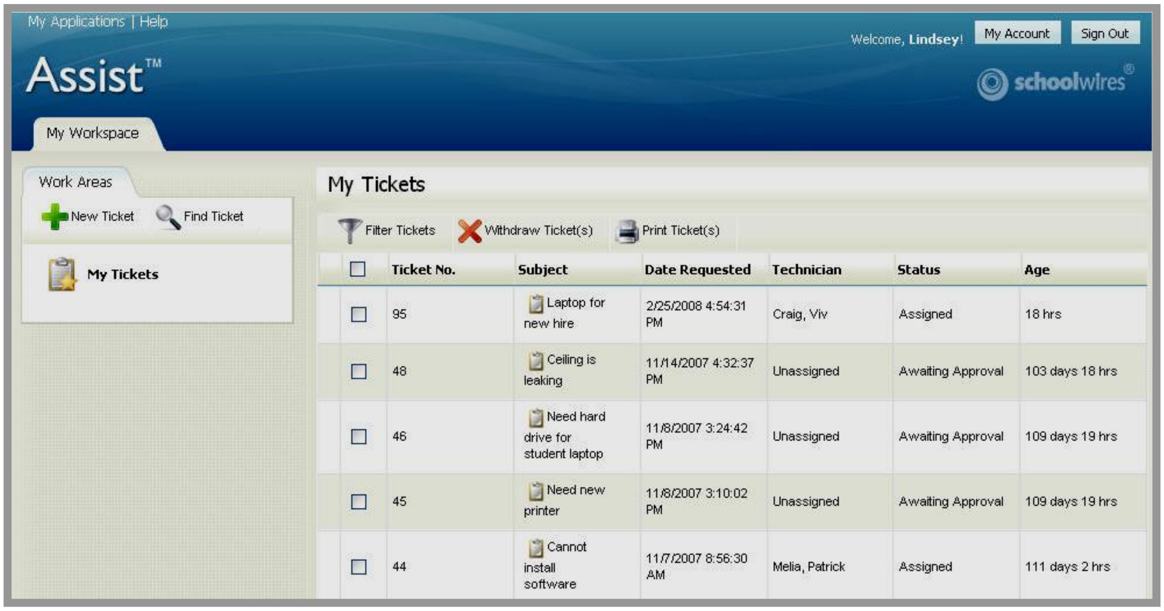


Figure 13: My Workspace for a requestor

Submitting Requests (Requestor Only Permission)

Users who have permission to submit requests (i.e., add tickets) and who are not managers or technicians can only submit requests for themselves.

To add a new ticket:

1. Click on the *New Ticket* button at the top of the navigation pane. A *New Request* window like the one shown in Figure 14 will display. All the fields in this window are required.

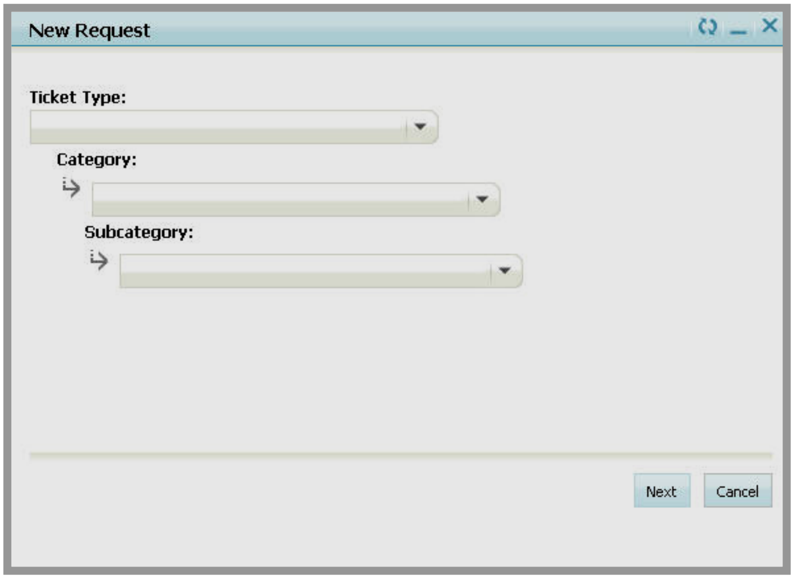


Figure 14: New Request first window

2. Choose a ticket type from the Ticket Type combo box. This will populate the Category combo box.
3. Choose a category from the Category combo box. This will populate the Subcategory combo box.
4. Choose a subcategory from the Subcategory combo box.

   Note: Based on the subcategory you choose, the ticket will be assigned to one of these three:

   - Approval Queue (Status column will show Awaiting Approval. Technician column will show Unassigned.)
   - Standard Queue (Status column will show In Queue. Technician column will show Unassigned.)
   - Staff member (Status column will show Assigned. Technician column will show staff member's name.)
5. Click on the *Next* button. A second *New Request* window like the one shown in Figure 15 will display. Both fields are required.

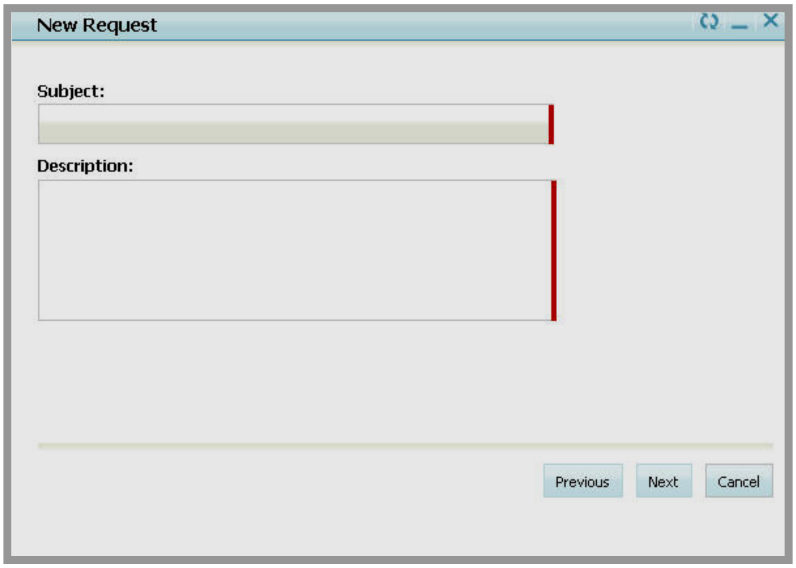


Figure 15: New Request second window

6. Enter a subject for the request. Be as clear and concise as possible.
7. Enter a description for the request. Provide more information about your request here.
8. Click on the *Next* button. A third *New Request* window like the one shown in Figure 16 will display. The building and location that display by default are the ones associated with you in your user account.

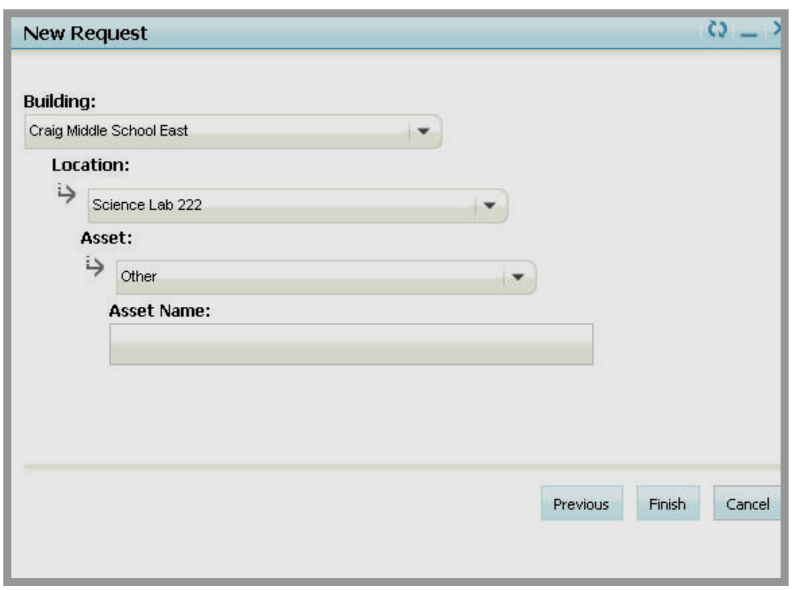


Figure 16: New Request third window

9. If you wish to submit a ticket for a building other than the one in your account, choose one from the Building combo box (required). This populates the Location combo box.

10. If you wish to submit a ticket for a location other than the one in your account, choose one from the Location combo box (required).
11. If you wish to assign an asset to the ticket, choose one from the combo box or type the name of the asset in the Asset Name text box (optional).

    Note: If you choose an asset from the Asset combo box, the Asset Name text box will not display. See Figure 17 for an example.

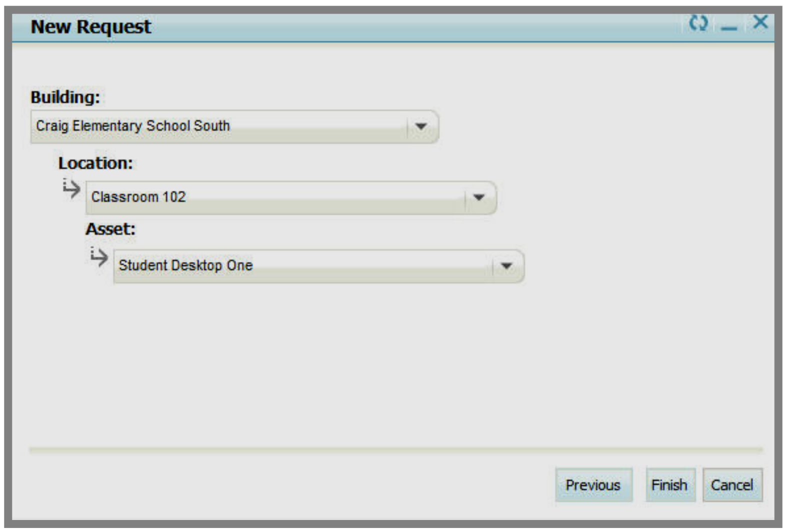


Figure 17: Asset chosen from combo box

12. Click on the *Finish* button. An *Edit Ticket* window like the one shown in Figure 18 will display. You will receive an email immediately concerning the ticket you just entered. Support staff will receive emails as required. Depending on the subcategory you chose and how it is assigned, the email will tell you one of the following three things.

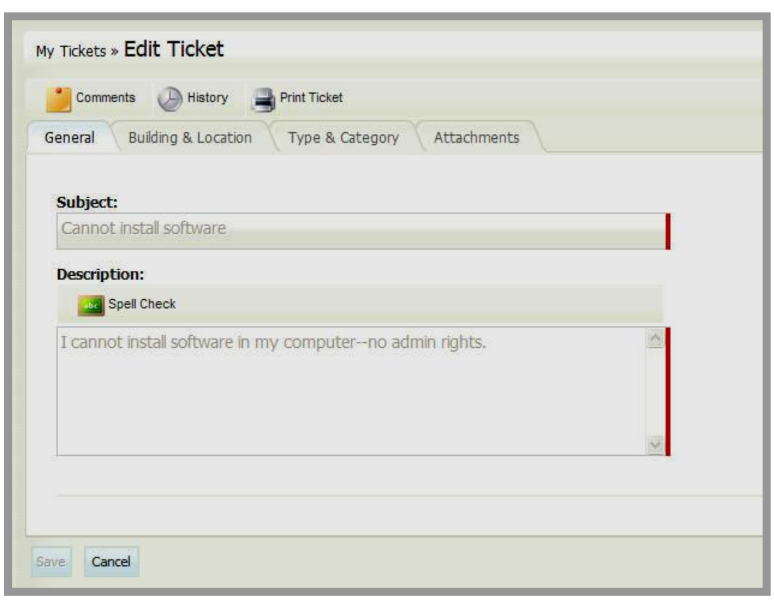


Figure 18: Edit Ticket window: General tab

- The ticket you entered has been assigned to a queue.
- The ticket you entered has been assigned to a technician.
- The ticket you entered requires approval.

13. To add an attachment, click on the *Attachments* tab. An *Attachments* tab like the one shown in Figure 19 will display.

Figure 19: Edit Ticket window: Attachments tab

a. Click on the *Add Attachment* button. A *New Attachment* window like the one shown in Figure 20 will display.

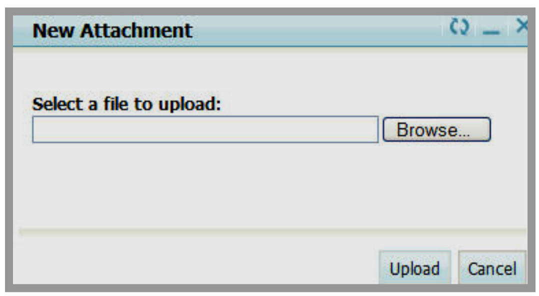


Figure 20: New Attachment window

b. Click on the *Browse* button. A browsing window will open.

c. Browse your computer or network for the file you wish to attach.

d. Select the file.

e. Click on the *Open* button in the browsing window. The *New Attachment* window will return as the active window. The file path will be populated as shown in Figure 21.

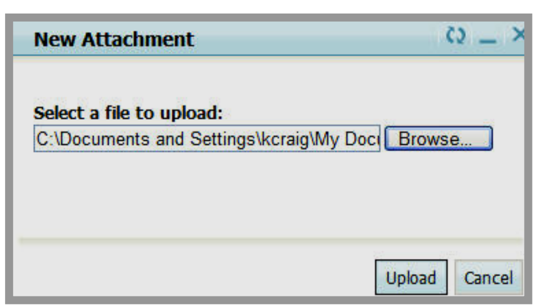


Figure 21: Populated New Attachment window

f. Click on the *Upload* button. The file you added will display in the grid on the *Attachments* tab as shown in Figure 22.

Figure 22: Edit Ticket window: Attachments tab

14. To add a comment:

a. Click on the *Comments* button. A *Ticket Comments* window like the one shown in Figure 23 will display.

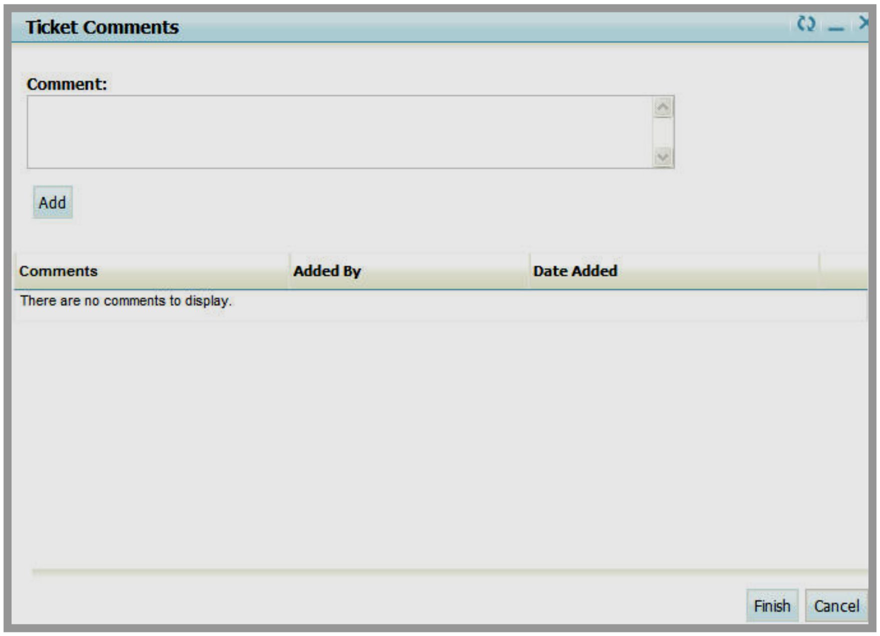


Figure 23: Ticket Comments window

b. Enter the comment in the text box.

c. Click on the *Add* button. The comment will display in the bottom of the window as shown in Figure 24.

d. Click on the *Finish* button. The *Ticket Comments* window will close.

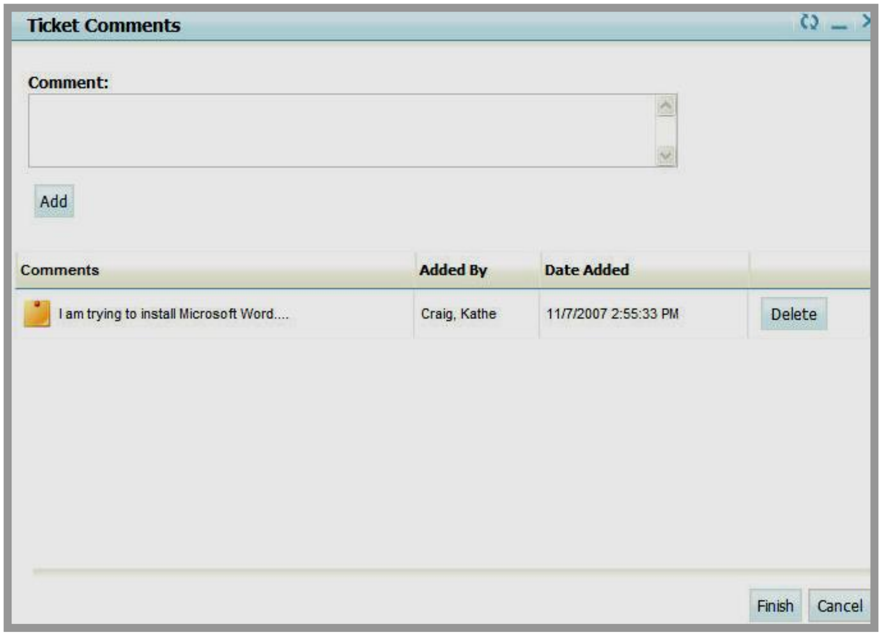


Figure 24: Ticket Comments window

Note: If you hover over a comment, the full comment and information about the comment will display.

Submitting Requests (Managers and Technicians)

Managers and technicians have the option of submitting requests for themselves in the same manner as any other requestor. They may also submit requests for other users. If their user profiles allow, they may submit recurring requests as well.

Adding a New Ticket for Self

To add a new ticket for yourself:

1. Click on the *New Ticket* button at the top of the navigation pane. A *New Request* window like the one shown in Figure 25 will display.

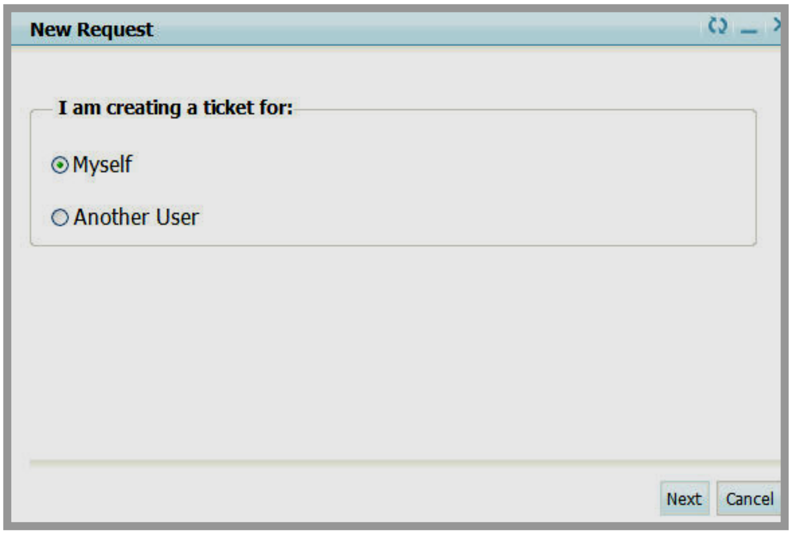


Figure 25: New Request window (manager or technician)

2. Leave the radio button to the left of Myself selected.
3. Click on the *Next* button. The next page of the *New Request* window like the one shown in Figure 26 will display.

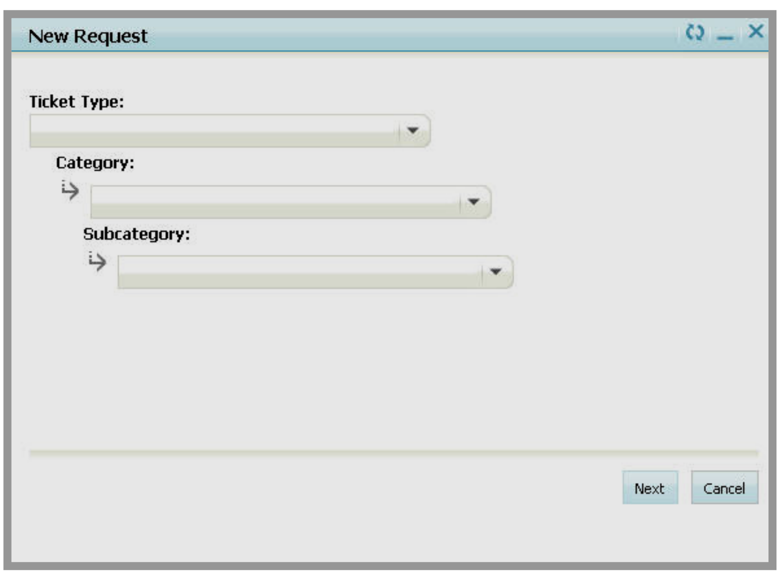


Figure 26: New Request second window

4. Choose a ticket type from the Ticket Type combo box. This will populate the Category combo box.
5. Choose a category from the Category combo box. This will populate the Subcategory combo box.
6. Choose a subcategory from the Subcategory combo box.

   Note: Based on the subcategory you choose, the ticket will be assigned to one of these three:

   - Approval Queue (Status column will show Awaiting Approval. Technician column will show Unassigned.)
   - Standard Queue (Status column will show In Queue. Technician column will show Unassigned.)
   - Staff member (Status column will show Assigned. Technician column will show staff member's name.)
7. Click on the *Next* button. A third *New Request* window like the one shown in Figure 27 will display.

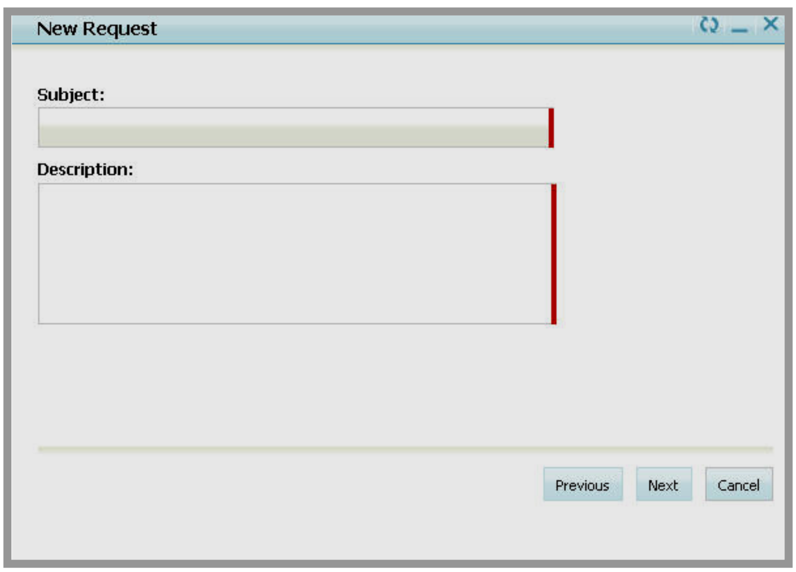


Figure 27: New Request third window

8. Enter a subject for the request. Be as clear and concise as possible.
9. Enter a description for the request. Provide more information about your request here.
10. Click on the *Next* button. A fourth *New Request* window like the one shown in Figure 28 will display. The building and location that display by default are the ones associated with you in your user account.

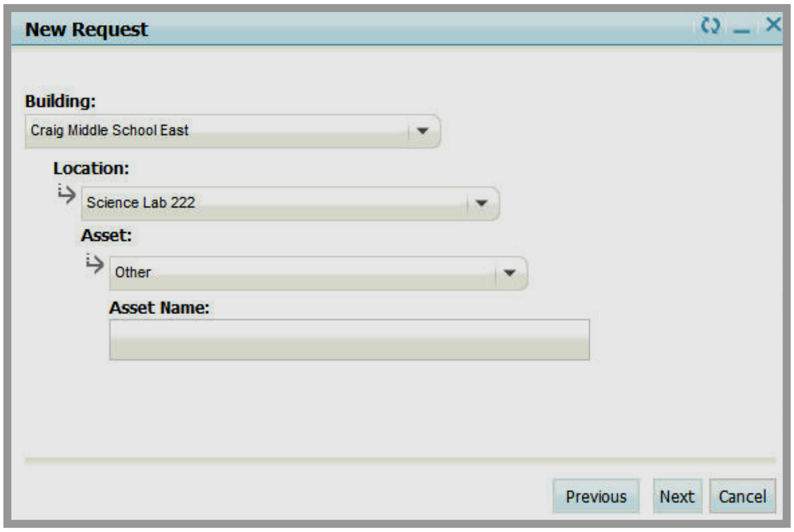


Figure 28: New Request fourth window

11. If you wish to submit a ticket for a building other than the one in your account, choose one from the Building combo box (required). This populates the Location combo box.
12. If you wish to submit a ticket for a location other than the one in your account, choose one from the Location combo box (required).
13. If you wish to assign an asset to the ticket, choose one from the combo box or type the name of the asset in the Asset Name text box (optional).

    <u>Note</u>: If you choose an asset from the Asset combo box, the Asset Name text box will not display. See Figure 29 for an example.

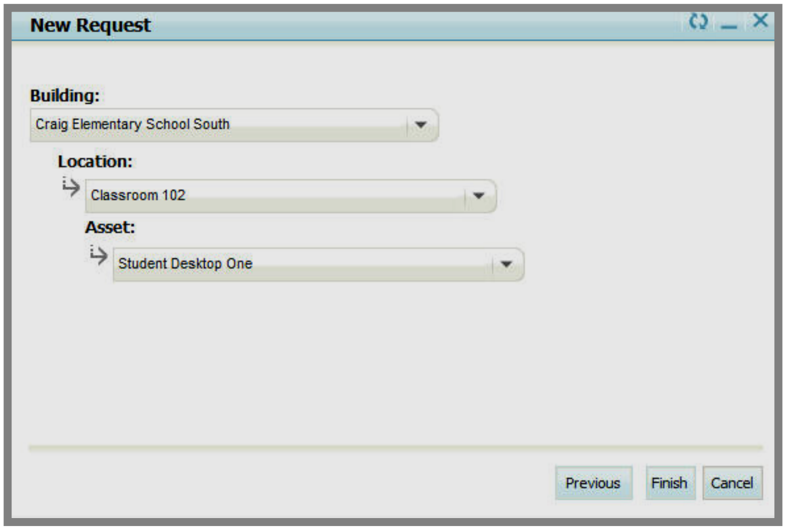


Figure 29: Asset chosen from combo box

14. Click on the *Finish* button. An *Edit Ticket* window will display. You will receive an email immediately concerning the ticket you just entered. Support staff will receive emails as required. Depending on the subcategory you chose and how it is assigned, the email will tell you one of the following three things.
    - The ticket you entered has been assigned to a queue.
    - The ticket you entered has been assigned to a technician.
    - The ticket you entered requires approval.
15. To add attachments, click on the *Attachments* tab. You will add attachments in the same manner as a requestor. See "Submitting Requests (Requestor Only Permission)" earlier in this chapter for more information.
16. To add comments, click on the *Comments* button. You will add comments in the same manner as a requestor. See "Submitting Requests (Requestor Only Permission)" earlier in this chapter for more information.

Adding a New Ticket for Another User

Since requests will come in from users who cannot access **Assist**, managers and technicians must have the option of submitting requests for other users.

To add a ticket for another user:

1. Click on the *New Ticket* button at the top of the navigation pane. A *New Request* window like the one shown in Figure 30 will display.

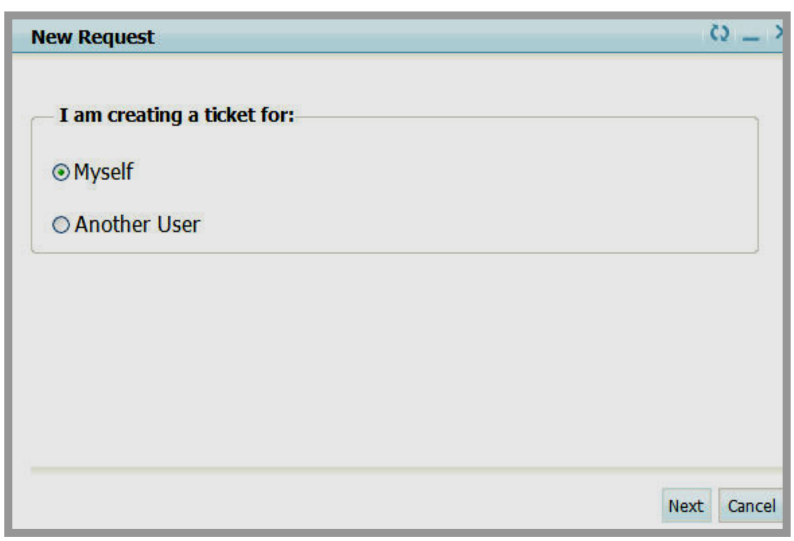


Figure 30: New Request window (manager or technician)

2. Click in the radio button to the left of Another User. The *New Request* window will refresh. As you can see from Figure 31, a combo box will display. All **Assist** users will display in this combo box.
3. Choose the user from the combo box.
4. Click the *Next* button. The next page of the *New Request* window will display.
5. Enter the rest of the information for the ticket as you would for one for yourself. Be certain the building and location are entered correctly for the user. The new ticket will display in the *My Tickets* window for the user for whom the ticket was created. The user for whom you entered the ticket will receive an email immediately concerning the ticket you just entered. Support staff will receive emails as required.

Submitting a Recurring Request

Managers and technicians whose user profiles include the permission to submit recurring requests can do so for themselves or for other users.

To submit a recurring request:

1. Click on the *New Ticket* button at the top of the navigation pane. A *New Request* window like the one shown in Figure 30 will display.

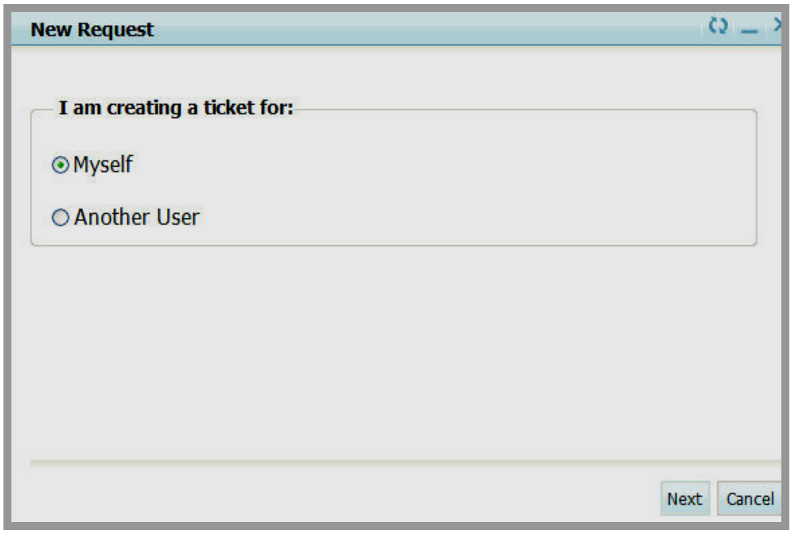


Figure 31: New Request window (manager or technician)

2. Choose the user option you desire for the recurring request by clicking in the radio button to the left of that option.
3. Once the next page of the *New Request* window as shown in Figure 32 displays, enter a subject for the request (required). Be as clear and concise as possible.

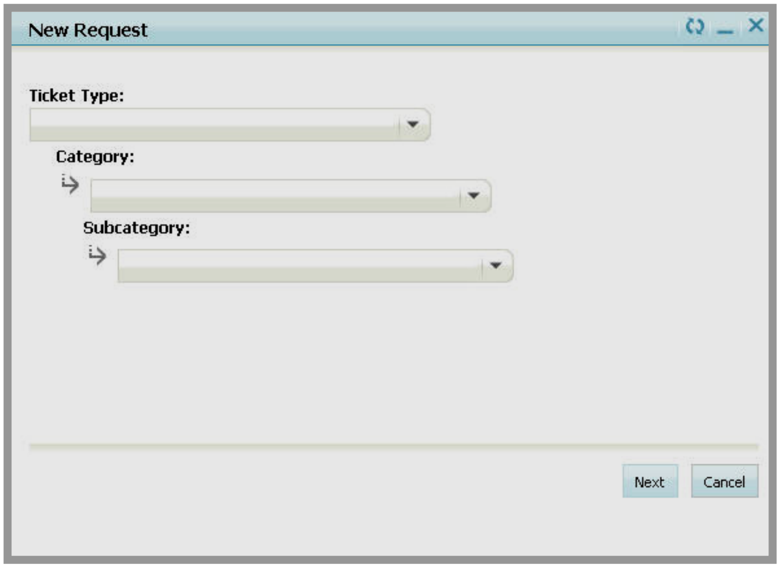


Figure 32: New Request window

4. Choose a ticket type from the Ticket Type combo box (required). This will populate the Category combo box.
5. Choose a category from the Category combo box (required). This will populate the Subcategory combo box.
6. Choose a subcategory from the Subcategory combo box (required). This will determine how the ticket is assigned to support staff.

   Note: Based on the subcategory you choose, the ticket will be assigned to one of these three:

   - Approval Queue (Status column will show Awaiting Approval. Technician column will show Unassigned.)
   - Standard Queue (Status column will show In Queue. Technician column will show Unassigned.)
   - Staff member (Status column will show Assigned. Technician column will show staff member' name.)
7. Click on the *Next* button. A *New Request* window like the one shown in Figure 33 will display.

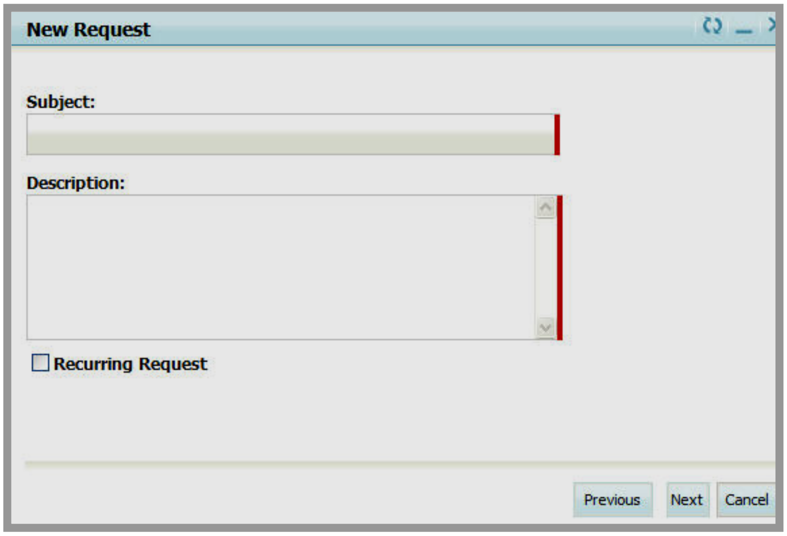


Figure 33: New Request window

8. Enter the subject for the request (required). Be as clear and concise as possible.
9. Enter a description for the request (required). Provide more information about your request here.
10. Since this is a recurring request, click in the checkbox to the left of Recurring Request.
11. Click on the *Next* button. The next page of the *New Request* window like the one shown in Figure 34 will display. Be certain the building and location are entered correctly for the user.

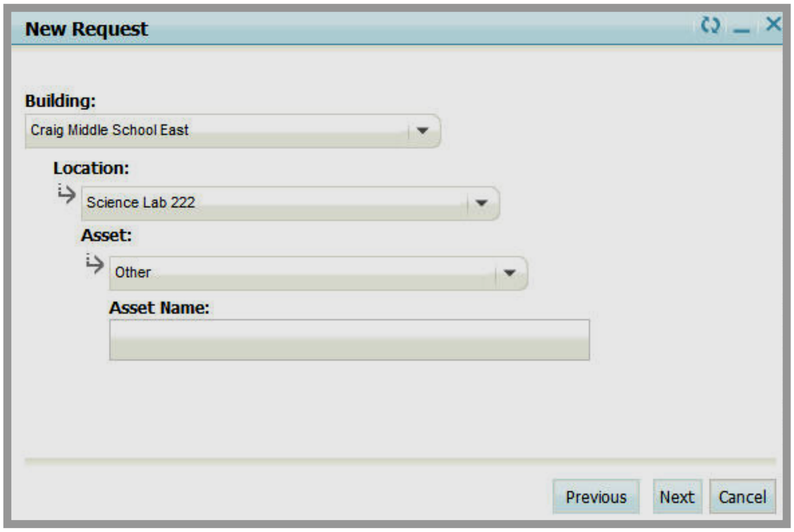


Figure 34: New Request window

12. If you wish to submit a ticket for a building other than the one shown by default, choose one from the Building combo box (required). This populates the Location combo box.
13. If you wish to submit a ticket for a location other than the one in shown by default, choose one from the Location combo box (required).
14. If you wish to assign an asset to the ticket, choose one from the combo box or type the name of the asset in the Asset Name text box (optional).
15. Click on the *Next* button. The last page of the *New Request* window like the one shown in Figure 35 will display. <u>All fields are required.</u>

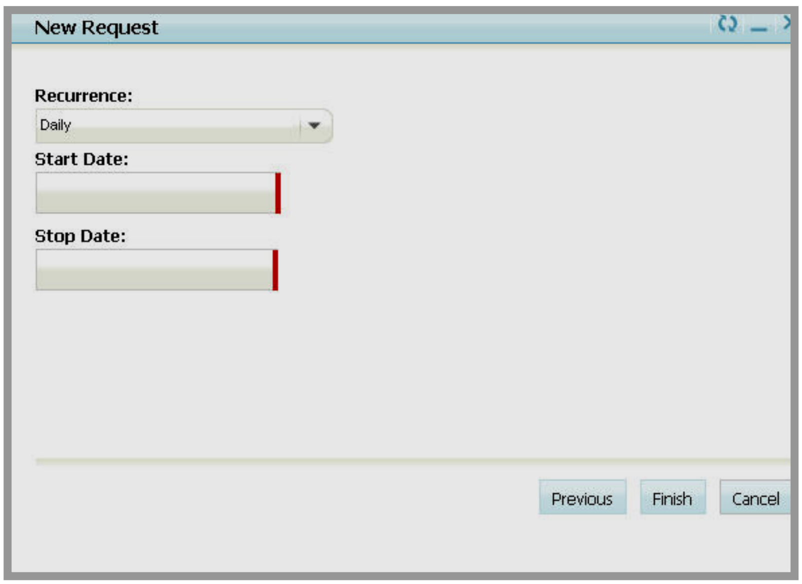


Figure 35: New Request window

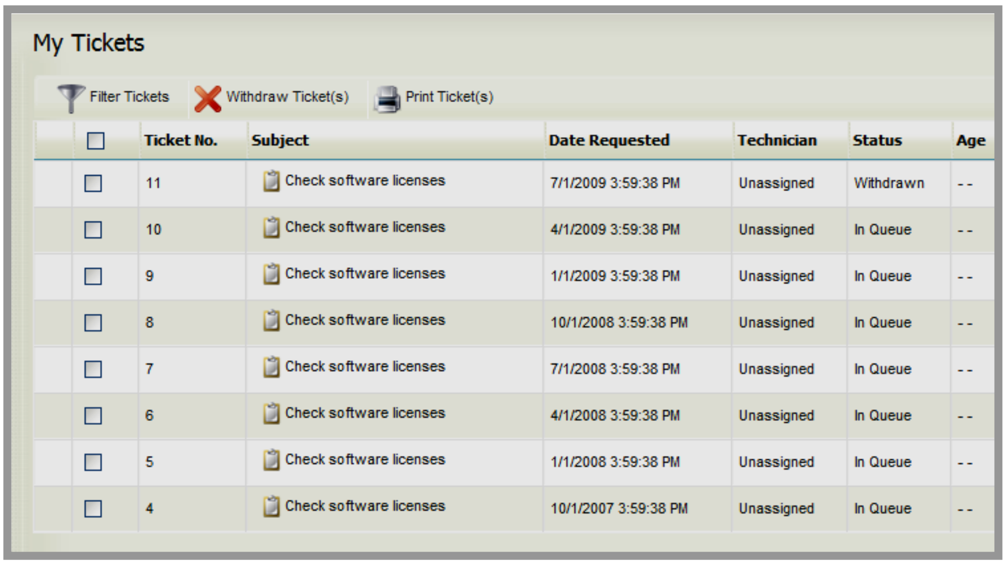
16. Choose the frequency of recurrence from the Recurrence combo box (required).
17. Enter a start date for the request (required).
18. Enter a stop date for the request (required).
19. Click on the *Finish* button. An *Edit Ticket* window will display.

    You or the user for whom the request was entered will receive an email confirming the ticket you entered. Depending on the subcategory you chose and how it is assigned, the email will tell you one of the following three things.

    - The ticket you entered has been assigned to a queue.
    - The ticket you entered has been assigned to a technician.
    - The ticket you entered requires approval.

20. To add attachments, click on the *Attachments* tab. You will add attachments in the same manner as a requestor. See “Submitting Requests (Requestor Only Permission)” earlier in this chapter for more information.
21. To add comments, click on the *Comments* button. You will add comments in the same manner as a requestor. See “Submitting Requests (Requestor Only Permission)” earlier in this chapter for more information.

Note: As you can see from Figure 36, the tickets and the requested date for the tickets will display according to the recurrence information you entered.



Ticket No.	Subject	Date Requested	Technician	Status	Age
11	Check software licenses	7/1/2009 3:59:38 PM	Unassigned	Withdrawn	--
10	Check software licenses	4/1/2009 3:59:38 PM	Unassigned	In Queue	--
9	Check software licenses	1/1/2009 3:59:38 PM	Unassigned	In Queue	--
8	Check software licenses	10/1/2008 3:59:38 PM	Unassigned	In Queue	--
7	Check software licenses	7/1/2008 3:59:38 PM	Unassigned	In Queue	--
6	Check software licenses	4/1/2008 3:59:38 PM	Unassigned	In Queue	--
5	Check software licenses	1/1/2008 3:59:38 PM	Unassigned	In Queue	--
4	Check software licenses	10/1/2007 3:59:38 PM	Unassigned	In Queue	--

Figure 36: My Tickets with recurring requests

Using the Ticket Click Menu in the My Tickets Window (All Requestors)

As a requestor, you can only add comments or attach files to a ticket. You cannot change any other information on the ticket.

You will use the ticket click menu to:

- Edit a ticket to attach, delete or download a file.

  TIP: You can also edit a ticket by double-clicking on the ticket subject. This will open an Edit Ticket window.

- Add comments to a ticket or delete comments from a ticket.
- View the history of a ticket.

Accessing the Ticket Click Menu

To access the click menu for a ticket, click on the subject of the ticket. A ticket click menu like the one shown in Figure 37 will display.

Figure 37: Ticket click menu

As you can see, the click menu for a ticket contains the following information about the ticket:

- Subject
- Description
- Building
- Location
- Ticket Type
- Category
- Subcategory

Attaching, Deleting or Downloading Files

After you have added a ticket, to attach additional files, delete attachments or download attachments, you must edit the ticket either from the ticket click menu or by double-clicking on the ticket subject.

To edit a ticket using the ticket click menu:

1. Click on the ticket subject. The click menu for that ticket will display.
2. Click on the *Edit* button. An *Edit Ticket* window like the one shown in Figure 38 will display. As you can see, it opens on the *General* tab. However, as a requestor, you cannot change the information on this tab.

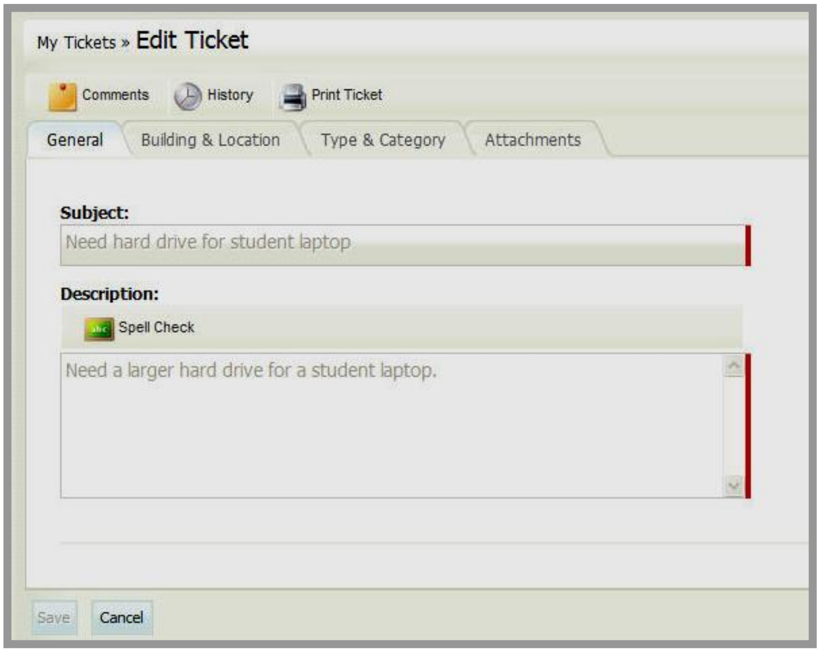


Figure 38: Edit Ticket window: General tab

Click on the *Attachments* tab as shown in Figure 39. You add attachments in the same manner as you do when you add a new ticket. See "Submitting Requests (Requestor Only Permission)" earlier in this chapter for more information.

Figure 39: Edit Ticket window: Attachments tab

a. To download a file, click on the *Download* button. Save or open the file as desired.

b. To delete an attachment:

   i. Click in the checkbox to the left of each attachment you wish to delete.

   Warning: If you have multiple pages of attachments, you can only select multiple attachments or use the Select All checkbox on a single page. If you move to another page, the attachments you selected on the first page will be deselected.

ii. Click on the *Delete Attachment(s)* button. A confirmation message like the one shown in Figure 40 will display.

Figure 40: Delete Attachment confirmation message

iii. Click on the *Delete* button. The attachment you deleted will not be listed in the grid on the *Attachments* tab.

iv. Repeat Step (i) to Step (iii) as required.

Adding Comments to a Ticket

You can add comments to a ticket from the ticket click menu or while editing that ticket. You add a comment to any ticket in the same manner as you do when you add a new ticket. You can add a comment from the ticket click menu or when editing a ticket. See "Submitting Requests (Requestor Only Permission)" earlier in this chapter for more information.

Deleting Comments from a Ticket

To delete a comment:

1. Click on the ticket subject. The ticket click menu for that ticket will display.
2. Click on the *Comments* button. A *Ticket Comments* window like the one shown in Figure 41 will display.

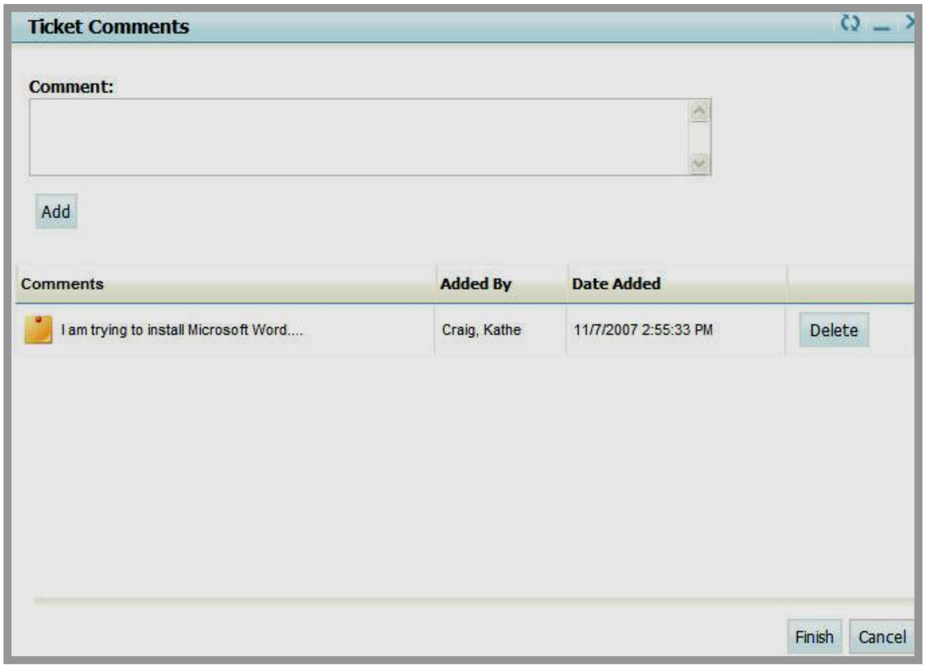


Figure 41: Ticket Comments window

3. Click on the *Delete* button to the right of the comment you wish to delete. A confirmation message like the one shown in Figure 42 will display.

Figure 42: Delete Comment confirmation message

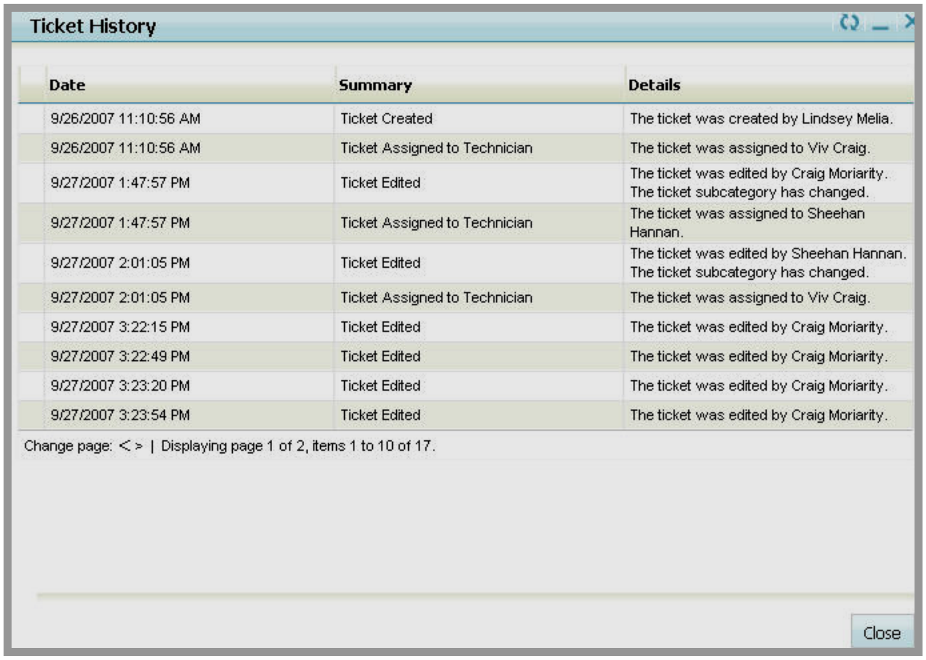
4. Click on the *OK* button. The *Ticket Comments* window will refresh. The comment you deleted will not be in the window.
5. Click on the *Finish* button. The *My Tickets* window will return as the active window.

   Note: If you accessed the *Ticket Comments* window while editing a ticket, the *Edit Ticket* window will return as the active window.

Viewing Ticket History

You can view history for a ticket from the ticket click menu or while editing that ticket.

To view history, click on the *History* button. A *Ticket History* window like the one shown in Figure 43 will display. As you can see, you can only view the information in this window.



Date	Summary	Details
9/26/2007 11:10:56 AM	Ticket Created	The ticket was created by Lindsey Melia.
9/26/2007 11:10:56 AM	Ticket Assigned to Technician	The ticket was assigned to Viv Craig.
9/27/2007 1:47:57 PM	Ticket Edited	The ticket was edited by Craig Moriarity. The ticket subcategory has changed.
9/27/2007 1:47:57 PM	Ticket Assigned to Technician	The ticket was assigned to Sheehan Hannan.
9/27/2007 2:01:05 PM	Ticket Edited	The ticket was edited by Sheehan Hannan. The ticket subcategory has changed.
9/27/2007 2:01:05 PM	Ticket Assigned to Technician	The ticket was assigned to Viv Craig.
9/27/2007 3:22:15 PM	Ticket Edited	The ticket was edited by Craig Moriarity.
9/27/2007 3:22:49 PM	Ticket Edited	The ticket was edited by Craig Moriarity.
9/27/2007 3:23:20 PM	Ticket Edited	The ticket was edited by Craig Moriarity.
9/27/2007 3:23:54 PM	Ticket Edited	The ticket was edited by Craig Moriarity.

Figure 43: Ticket History window

Using the Buttons in the My Tickets Window (All Requestors)

With the exception of the *Filter Tickets* button, the buttons at the top of the *My Tickets* window may be applied to multiple tickets on a page in the grid.

Warning: If you have multiple pages of tickets within the *My Tickets* window, you can only select multiple tickets or use the Select All checkbox on a single page. If you move to another page, the tickets you selected on the first page will be deselected.

Access the *My Tickets* task in the navigation pane. A *My Tickets* window like the one shown in Figure 44 will display. This contains any tickets that you have submitted or someone has submitted for you.

Figure 44: My Tickets window

Filtering Tickets

Within the *My Tickets* window, you can only filter by ticket status. To do this:

1. Click on the *Filter Tickets* button. A filter panel like the one shown in Figure 45 will display between the buttons and the grid. As you can see, it defaults to showing all open tickets.

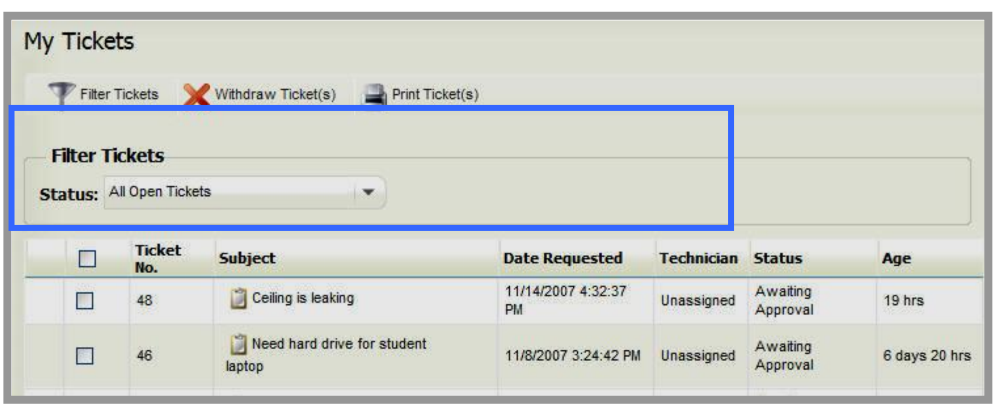


Figure 45: Filter panel

2. Choose a status from the Status combo box. The *My Tickets* window will refresh. Only the tickets with the status you chose will display in the grid.

Note: To close the filter panel, click on the *Filter Tickets* button again.

Withdrawing Tickets

If you have resolved the problem or entered it in error, you can withdraw the ticket for that work. To do this:

1. Use the filter or pagination as required to locate the ticket or tickets you wish to withdraw.
2. Click in the checkbox to the left of the ticket or tickets you wish to withdraw.
3. Click on the *Withdraw Ticket(s)* button. A *Withdraw Ticket(s)* window like the one shown in Figure 46 will display.

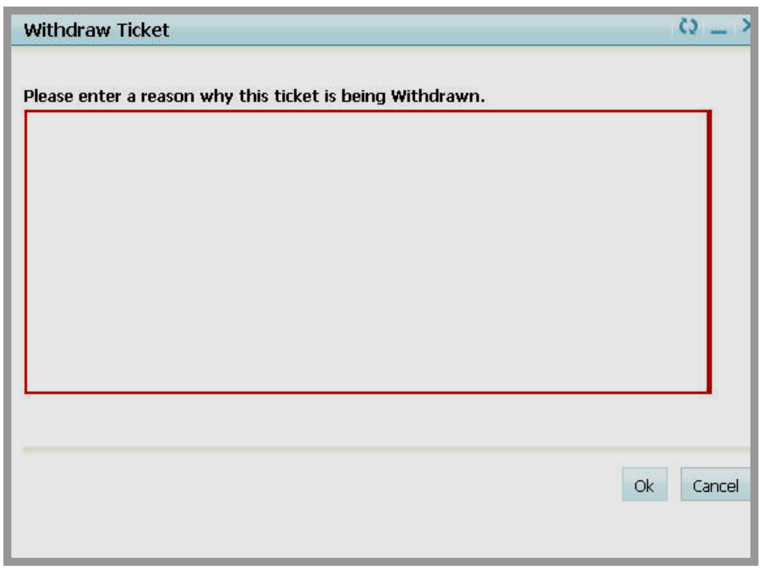


Figure 46: Withdraw Ticket window

4. Enter the reason you are withdrawing the ticket. You must enter at least 25 characters.
5. Click the *OK* button. *My Tickets* will return as the active window. The status of the ticket or tickets you withdrew will be Withdrawn.

   Note: If you are withdrawing multiple tickets, the reason for the withdrawal will be the same for all the tickets.

Printing Tickets

To print selected tickets:

1. Use the filter or pagination as required to locate the ticket or tickets you wish to print.
2. Click in the checkbox to the left of the ticket or tickets you wish to print.
3. Click on the *Print Ticket(s)* button. A *Print Ticket(s)* window like the one shown in Figure 47 will display.

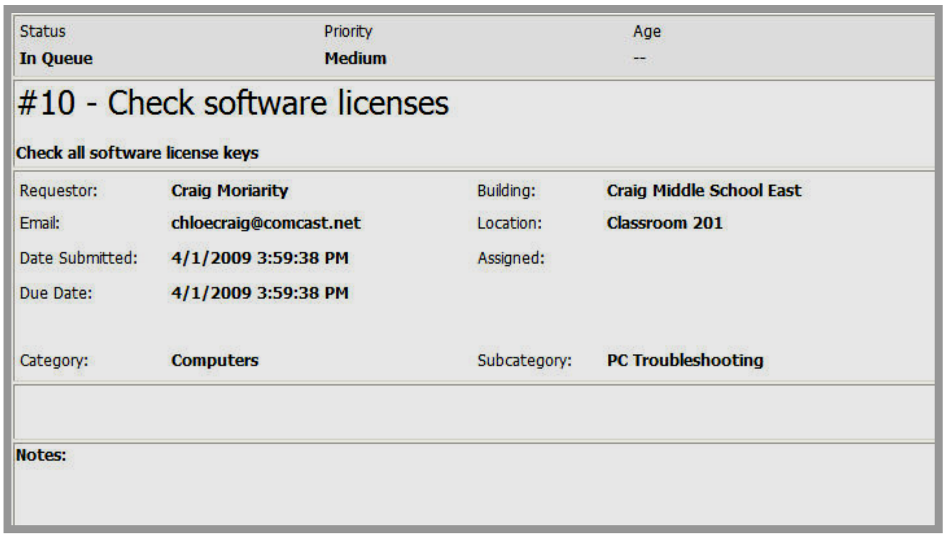


Figure 47: Print Ticket

<u>Note</u>: If you selected more than one ticket, they will all display in the same window and print as one document.

4. Use your browser *Print* button or keyboard shortcut to print.

Ticket Completion Survey

When a ticket is closed, the requestor will receive an email like the one shown in Figure 48. The requestor will click on the link in the email to go to the Ticket Completion survey like the one shown in Figure 49.

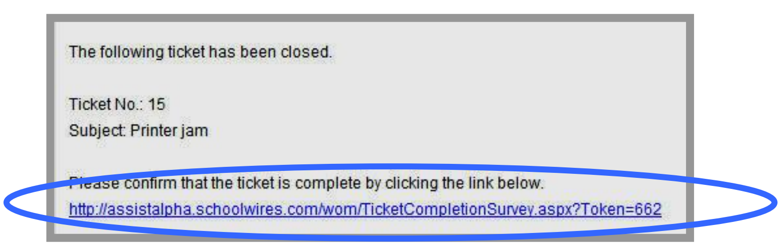


Figure 48: Email to requestor when ticket closed

Ticket Completion Survey When Work is Complete (Requestors)

When the requestor clicks on the link in the email, a sign-in window for **Assist** will display. After signing in, the requestor will see a *Ticket Completion Survey* window like the one shown in Figure 49.

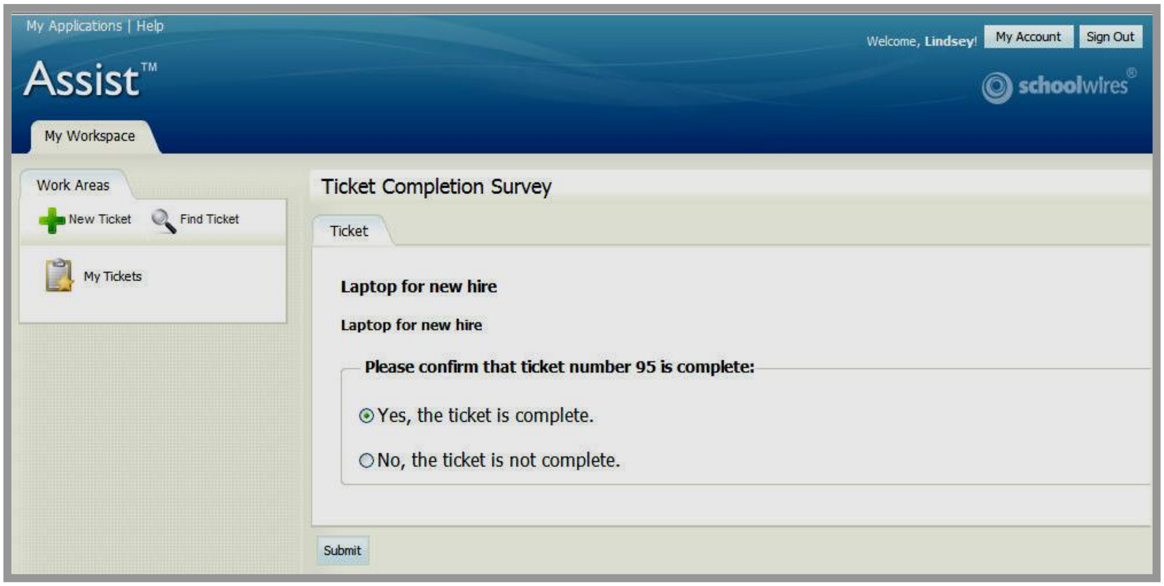


Figure 49: Ticket Completion Survey window

The survey defaults to Yes. Therefore, if the work has been completed satisfactorily, the requestor just has to click on the *Submit* button.

Ticket Completion Survey When Work is Not Complete (Requestors)

After signing in to **Assist**, the requestor will see a *Ticket Completion Survey* like the one shown in Figure 49. If the work has not been completed satisfactorily, the requestor will click in the radio button to the left of No. A comment field will display as shown in Figure 50.

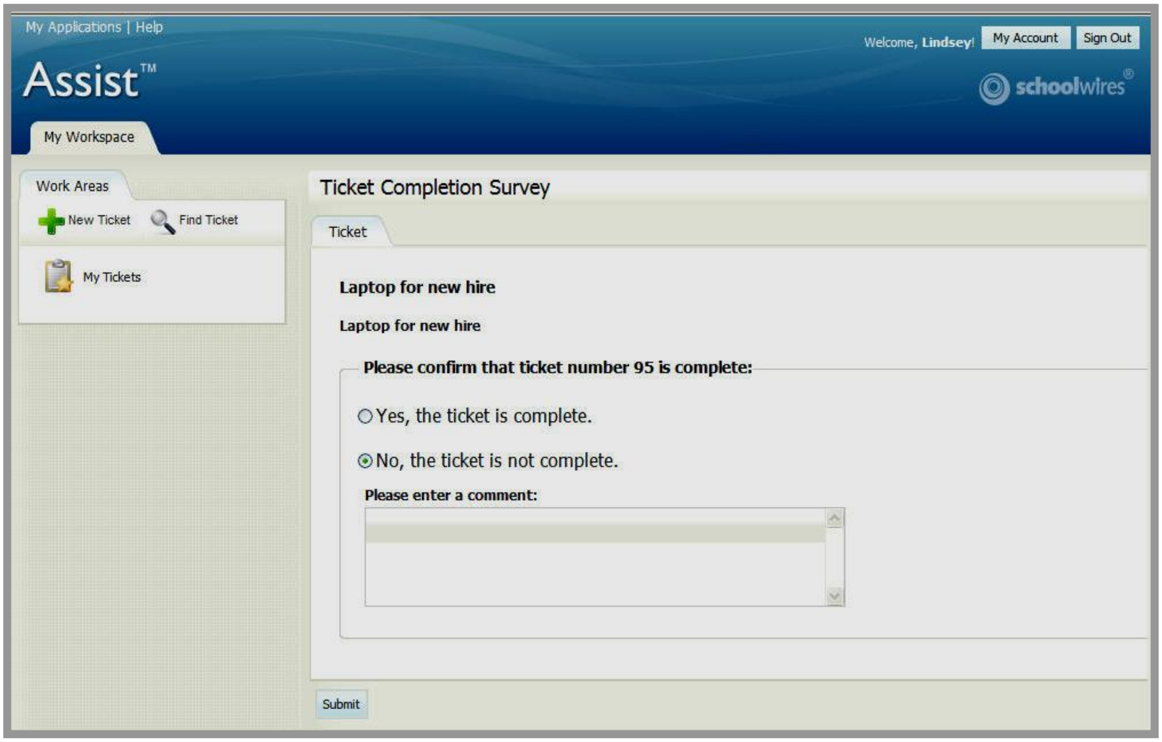


Figure 50: Comment field in Ticket Completion Survey window

To re-open the ticket, the requestor <u>must</u> enter a comment and click on the *Submit* button. The technician will be notified that the ticket has been re-opened. It will display on the *By Technician* tab of *Service Tickets* with a status of Assigned.

Finding Tickets

You can search for tickets by:

- Ticket Number
- Building & Location
- Ticket Type, Category and Subcategory
- Status and Priority

You will search the same way whether you are solely a requestor or also a member of the support staff. Your results, however, will be different.

Results for Requestors

If you are solely a requestor, **Assist** will only search the tickets you entered. You will be able to edit those tickets as you normally can.

Results for Support Staff

If you are a member of the support staff, **Assist** will search all tickets. However, you will only be able to access those tickets with which you are associated as either a requestor or a support staff member.

Finding Tickets

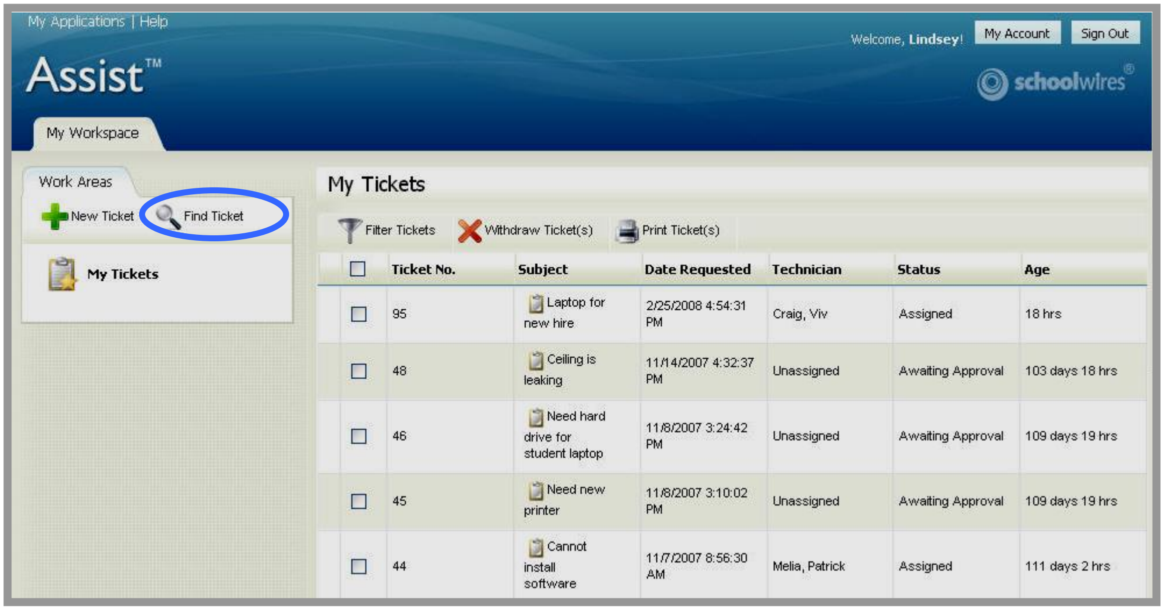


Figure 51: My Tickets workspace for a requestor

To search for tickets:

1. Click on the *Find Ticket* button in the navigation pane. A *Find Ticket* window like the one shown in Figure 52 will display.

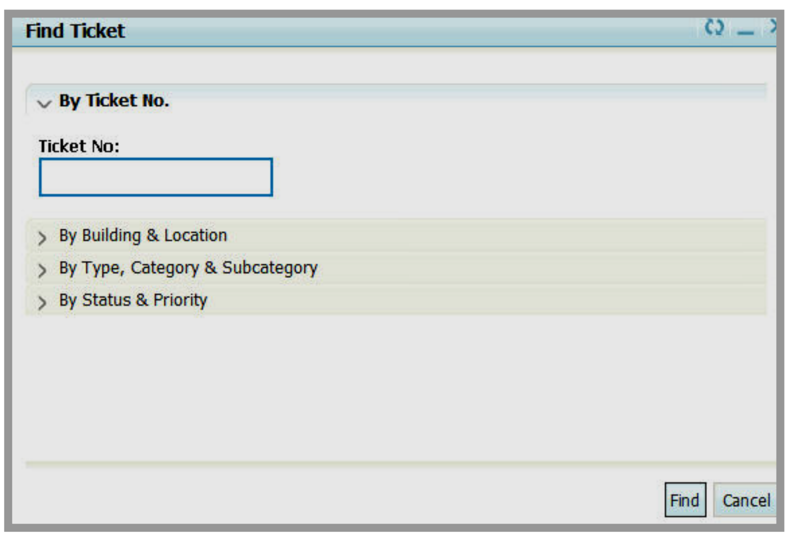


Figure 52: Find Ticket window: Ticket No.

2. To search by ticket number:

   a. Enter a ticket number in the Ticket No. field. Enter numerals only.

   b. Click on the *Find* button. The results of the search will depend on your role. Your access to a ticket found in the search will depend on your association with that ticket.

3. To search by building and location:

   a. Click on the to the left of By Building & Location. It will expand as shown in Figure 53.

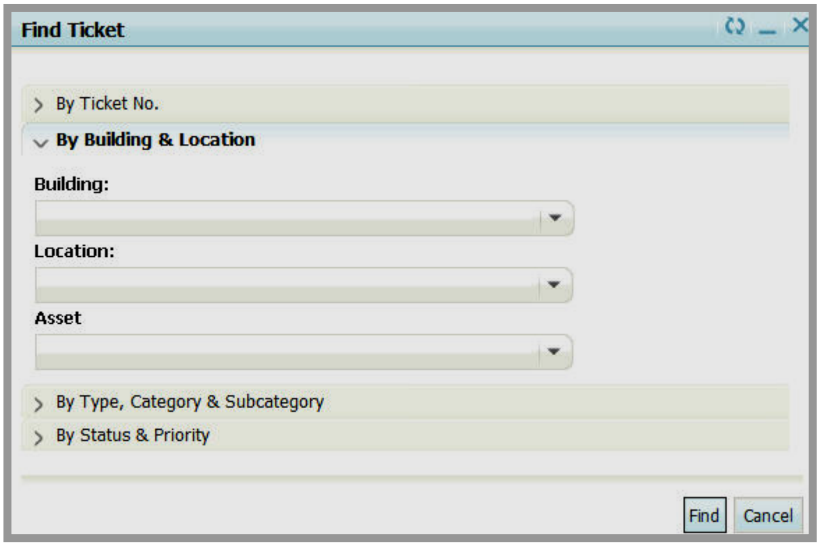


Figure 53: Find Ticket window: Building & Location

   b. Choose a building from the Building combo box. That will populate the Location combo box.

   c. Choose a location from the Location combo box. That will populate the Asset combo box.

   d. Choose an asset from the Asset combo box if desired.

   e. Click on the *Find* button. The results of the search will depend on your role. Your access to tickets found in the search will depend on your association with those tickets.

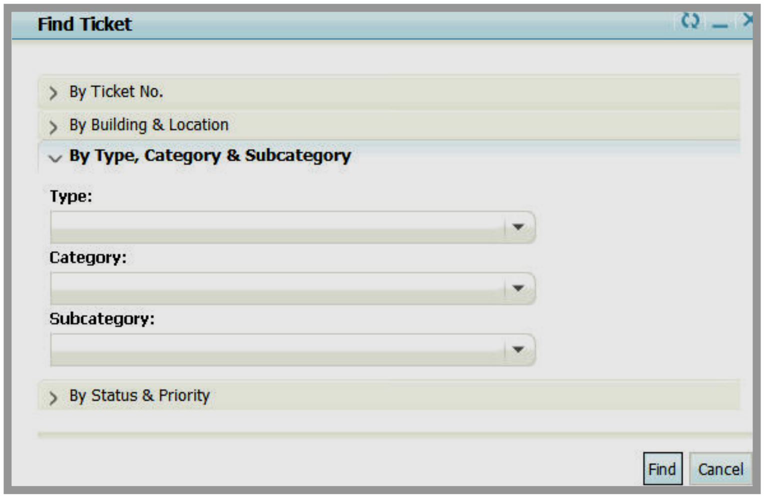


Figure 54: Find Ticket window: Type, Category & Subcategory

4. To search by ticket type, category and subcategory:
    a. Click on the to the left of By Type, Category & Subcategory. It will expand as shown in Figure 54.
    b. Choose a type from the Type combo box. That will populate the Category combo box.
    c. Choose a category from the Category combo box. That will populate the Subcategory combo box.
    d. Choose a subcategory from the Subcategory combo box.
    e. Click on the *Find* button. The results of the search will depend on your role. Your access to tickets found in the search will depend on your association with those tickets.
5. To search by status and priority:
    a. Click on the to the left of By Status and Priority. It will expand as shown in Figure 55.

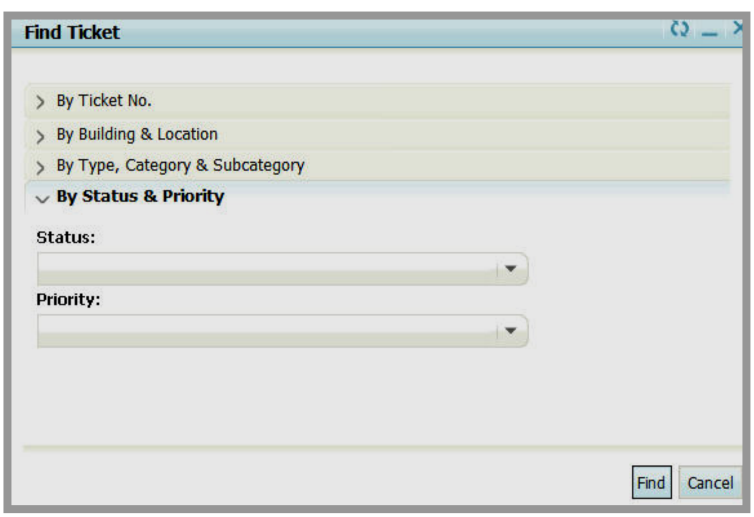


Figure 55: Find Ticket window: Status & Priority

b. Choose a status from the Status combo box.

c. Choose a priority from the Priority combo box.

d. Click on the *Find* button. The results of the search will depend on your role. Your access to tickets found in the search will depend on your association with those tickets.

Approval Queue Window (Approvers)

Only users who have been assigned as approvers will see the *Approval Queue* task in the navigation pane of the *My Workspace* tab.

Requestors must choose a subcategory for each ticket they enter. In doing this, they are determining whether that ticket is assigned to a standard queue, an approval queue or a specific technician.

If a ticket has been assigned to an approval queue, the requestor receives an email stating that the ticket requires approval. All first level approver receive emails informing them that a ticket requires approval. Approval queues can have up to five levels of approval.

If there are multiple approvers at any level, only one must approve a ticket. Then it will either move to the next approval level or to the *Service Tickets* windows for the appropriate support staff.

The approval queue we set up for this chapter required two levels of approval. Approver Chloe is a first-level approver. Approver Syd is a second-level approver.

Before Approver Chloe was notified that any tickets required approval, she signed in and her *Approval Queue* window looked like the one shown in Figure 56.

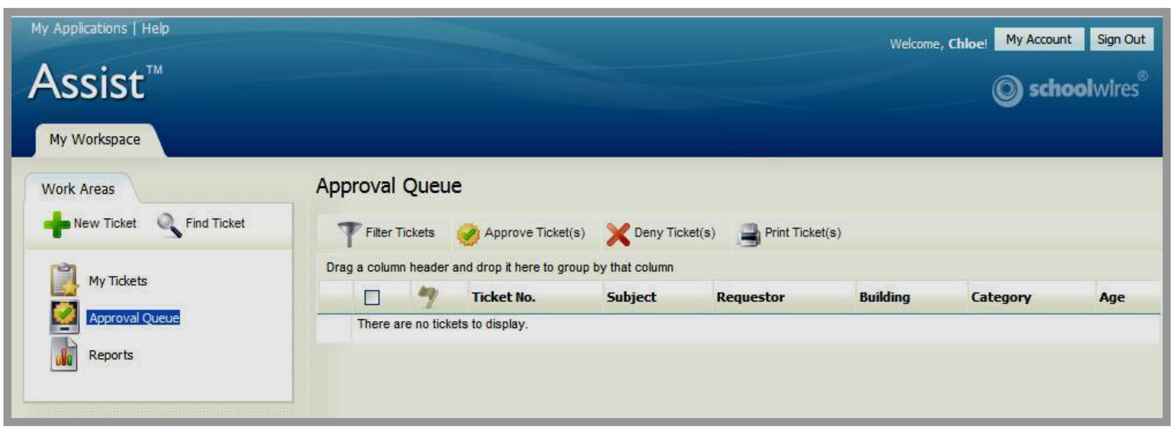


Figure 56: Chloe's Approval Queue window with no tickets

After she received an email telling her a ticket required approval, she signed in again. Her *Approval Queue* window looked like the one shown in Figure 57.

Figure 57: Chloe's Approval Queue with ticket

Approver Syd signed in at the same time as Approver Chloe after Chloe received the email. However, as you can see from Exhibit 58, since Syd is a level-two approver for the queue, the ticket does not yet show in her queue.

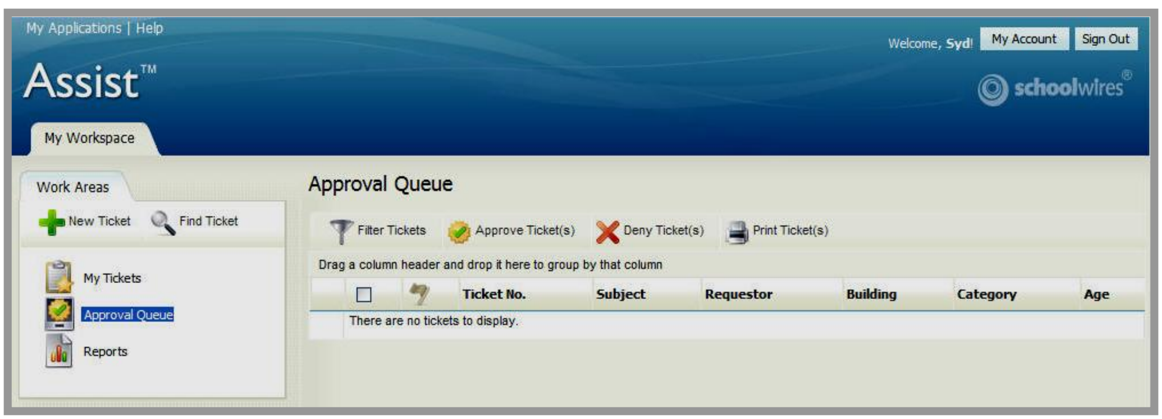


Figure 58: Syd's Approval Queue no tickets

As you can see from Figure 59, as an approver, the ticket click menu is available to Chloe.

Using the buttons in the *Approval Queue* window, she is also able to:

- Filter tickets.
- Approve tickets.
- Deny tickets.
- Print tickets.

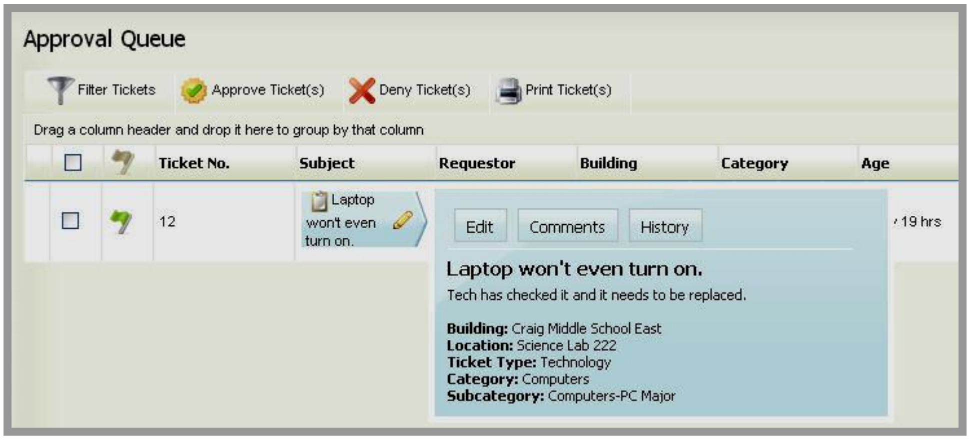


Figure 59: Ticket click menu in Approval Queue window

Using the Ticket Click Menu in the Approval Queue Window

Accessing the Ticket Click Menu

You will access the ticket click menu in the *Approval Queue* window in the same manner as you access it in the *My Tickets* window. You will click on the ticket subject as shown in Figure 60.

Editing a Ticket

As an approver, you can edit all the information on a ticket. You can add attachments, delete attachments and download attachments.

TIP: You can also edit a ticket by double-clicking on the ticket subject. This will open an Edit Ticket window.

To edit a ticket from the ticket click menu:

1. Click on the *Edit* button in the ticket click menu. An *Edit Ticket* window like the one shown in Figure 60 will display.

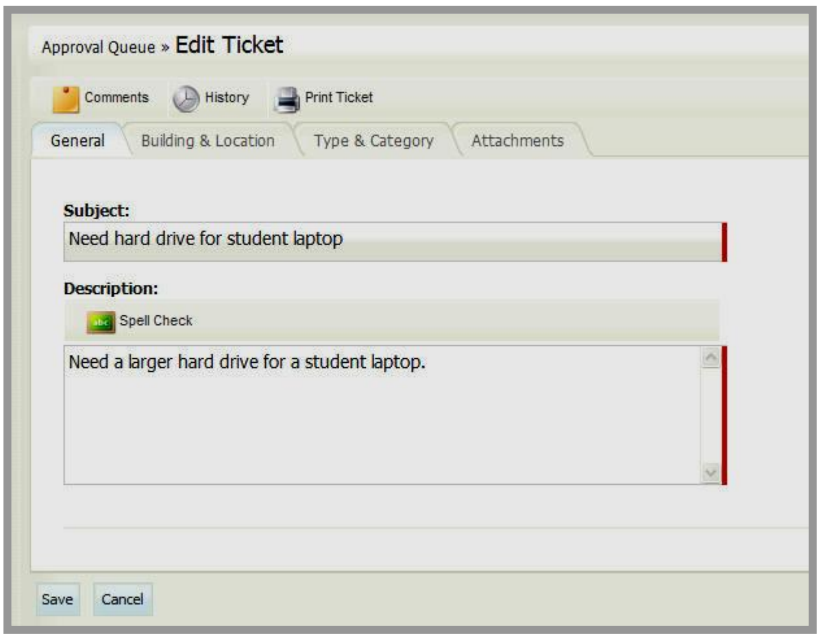


Figure 60: Edit Ticket window

2. Change information on the *General* tab as required.
3. Change information on the *Building & Location* tab as required. Remember that changing the building on the ticket may move it to the *Approval Queue* window of approvers assigned to that queue in the other building. The ticket may be removed from your *Approval Queue* window if you are not assigned to that building.
4. Change the ticket type, category or subcategory on the *Category* tab as required. Remember that changing the subcategory may change the queue or technician on that ticket. As a result, the ticket may be removed from your *Approval Queue* window.

5. Add, delete or download attachments on the *Attachments* tab. You do this in the same manner as a requestor. However, as an approver, you can make attachments viewable only to members of the support staff by marking them as internal attachments as shown in Figure 61.

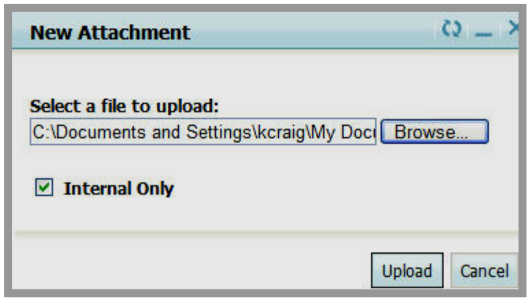


Figure 61: New Attachment window in Service Tickets

6. Click on the *Save* button. The *Approval Queue* window will return as the active window.

Adding Comments

Approvers will add comments to tickets in the *Approval Queue* window in the same manner as requestors add comments in the *My Tickets* window—from the ticket click menu or while editing a ticket. However, as you can see from Figure 62, approvers may add internal comments to tickets that cannot be viewed by requestors.

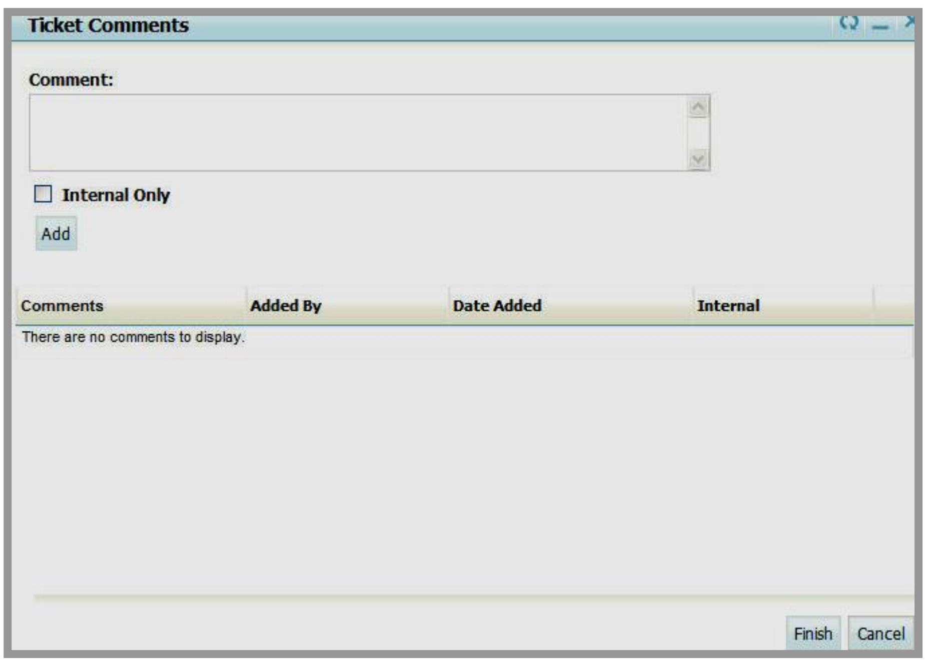


Figure 62: Ticket Comments window in Approval Queue

Viewing Ticket History

Approvers will view history on a ticket in the same way requestors view history—from the ticket click menu or while editing that ticket. Click on the *History* button to view the ticket's history.

Using the Buttons in the Approval Queue Window

As you can see from Figure 63, as an approver, you have access to the following buttons in the *Approval Queue* window.

- Filter Tickets
- Approve Tickets
- Deny Tickets
- Print Tickets

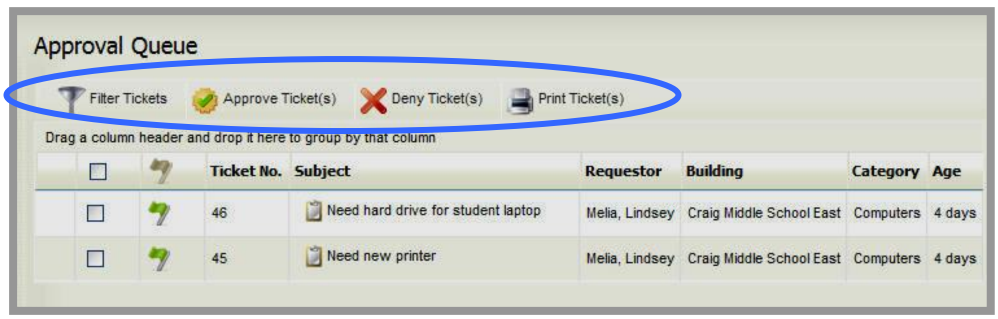


Figure 63: Approval Queue window

Filtering Tickets

Approvers will filter tickets in the *Approval Queue* in the same way requestors filter tickets in the *My Tickets* window.

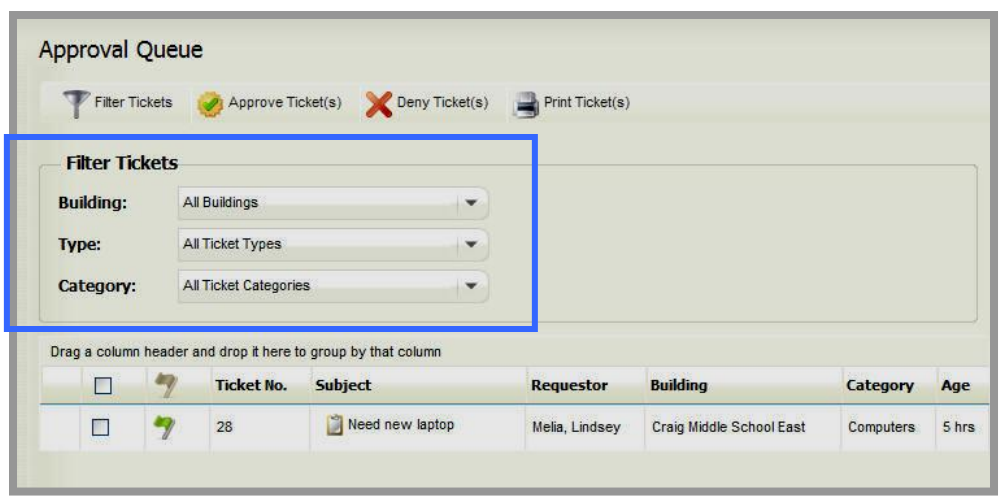


Figure 64: Filter in Approval Queue

However, as you can see from Figure 64, an approver can filter tickets by:

- Building
- Type
- Category

Approving Tickets

Approvers will use the *Approve Ticket(s)* button to approve tickets in the *Approval Queue*.

To approve tickets:

1. Click in the checkbox to the left of each ticket you wish to approve.

   Warning: If you have multiple pages of tickets, you can only select multiple tickets or use the Select All checkbox on a single page. If you move to another page, the tickets you selected on the first page will be deselected.

2. Click on the *Approve Ticket(s)* button. A confirmation message like the one shown in Figure 65 will display.

Figure 65: Approve Ticket(s) confirmation message

3. Click on the *Approve* button. The *Approval Queue* window will return as the active window. The ticket you approved will no longer display in the grid.

   a. If there are other approvers at a higher level:

      - The ticket will display in their *Approval Queue* windows. Notice in Figure 66 that the ticket Approver Chloe just approved now appears in Approver Syd's *Approval Queue* window.

Figure 66: Syd's Approval Queue window with ticket

- The approvers for the next level will be notified.
- The requestor will be notified that the ticket requires approval.

  Note: If there are multiple approvers at a level, only one has to approve the ticket for it to move to the next level.

b. If you are the final approver for the ticket:

- The ticket will be moved to the *Service Tickets* windows of the appropriate members of the support staff.
- Support staff will be notified.
- The requestor will be notified that the ticket has been assigned to a queue.

  Note: If there are multiple approvers at the final level, only one has to approve the ticket for it to move to the ticket queue.

Denying Tickets

Approvers will use the *Deny Ticket(s)* button to approve tickets in the *Approval Queue*.

To deny tickets:

1. Click in the checkbox to the left of each ticket you wish to deny.

   Warning: If you have multiple pages of tickets, you can only select multiple tickets or use the Select All checkbox on a single page. If you move to another page, the tickets you selected on the first page will be deselected.

2. Click on the *Deny Ticket(s)* button. A *Deny Ticket* window like the one shown in Figure 67 will display.

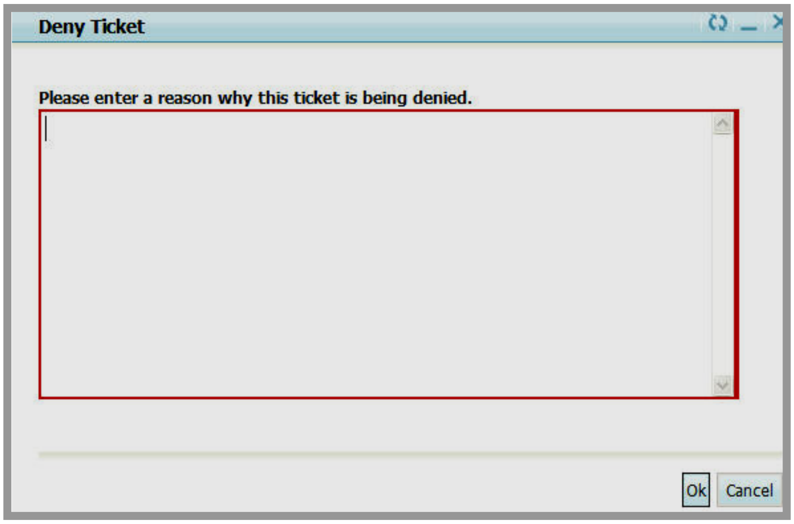


Figure 67: Deny Ticket window

3. Enter the reason you are denying the ticket. <u>You must enter at least 25 characters</u>.

   <u>Note</u>: If you deny multiple tickets, the same reason for denial will be entered for all the tickets.

4. Click on the *OK* button. The *Approval Queue* window will return as the active window. The ticket you denied will no longer display in the grid. The requestor will be notified that the ticket has been denied. No other approvers or support staff will be notified since the ticket is no longer in process.

   <u>Note</u>: The requestor will be able to view the reason the ticket was denied in the ticket history. If desired, the requestor will need to create a new ticket to re-submit the work request. There is no way to re-open a ticket that has been denied.

Printing Tickets

Approvers will print tickets in the *Approval Queue* window in the same manner as requestors print tickets in the *My Tickets* window.

Service Tickets Window (Managers and Technicians)

Only users who have been assigned as managers or technicians will see the *Service Tickets* task in the navigation pane of the *My Workspace* tab.

If the user profiles for a manager and a technician include permission to cancel and assign tickets, the tasks that they can perform in the *Service Tickets* window will be the same. The difference will be what tickets will display on the *By Technician* tab of that

Tickets on the By Technician Tab of the Service Tickets Window

Technicians will only see tickets assigned to them on the *By Technician* tab of the *Service Tickets* window. Managers, on the other hand, will see all tickets assigned to themselves as well as to any technicians who have been assigned to them. Let's look at the *By Technician* tab of *Service Tickets* for Manager Craig, and Technicians Viv and Patrick.

Notice in Figure 68 that Craig can see the tickets assigned to both Viv and Patrick regardless of the building in which the work is located. Ticket #15 is for work at the Elementary School North and Ticket #2 is for work at the High School. Manager Craig is not assigned to either of these buildings as support staff. What a manager can see on this tab will depend on how the technician and building assignments were configured in *Settings* in **Assist** *Administration*. Building assignments are not a factor when tickets are assigned directly to a member of support staff when a requestor chooses a subcategory

Figure 68: By Technician tab of the Service Tickets window for Manager Craig

As you can see from Figure 69, however, Viv can only see the tickets assigned to her on the *By Technician* tab of the *Service Tickets* window. In Figure 70 you see that Patrick can only see those assigned to him.

Figure 69: By Technician tab of the Service Tickets window for Technician Viv

Notice that neither of the tickets shown in Figure 69 is for work in the Middle School East, which is the only building to which Viv is assigned in *Settings*. That is because these tickets were assigned to Viv when the subcategory was selected when the tickets were created or edited. The building assignments in *Settings* only affect tickets that are assigned to queues.

In Figure 70, you only see one ticket assigned to Technician Patrick. Since it is for work in the Middle School East, the only building to which Patrick is assigned in *Settings*, you cannot tell whether the assignment was made when a subcategory was selected or from within a queue.

Patrick was assigned a user profile that did not include permission to assign or cancel tickets. Consequently as you can see in Figure 70, the *Cancel Tickets* button does not appear on his *By Technician* tab.

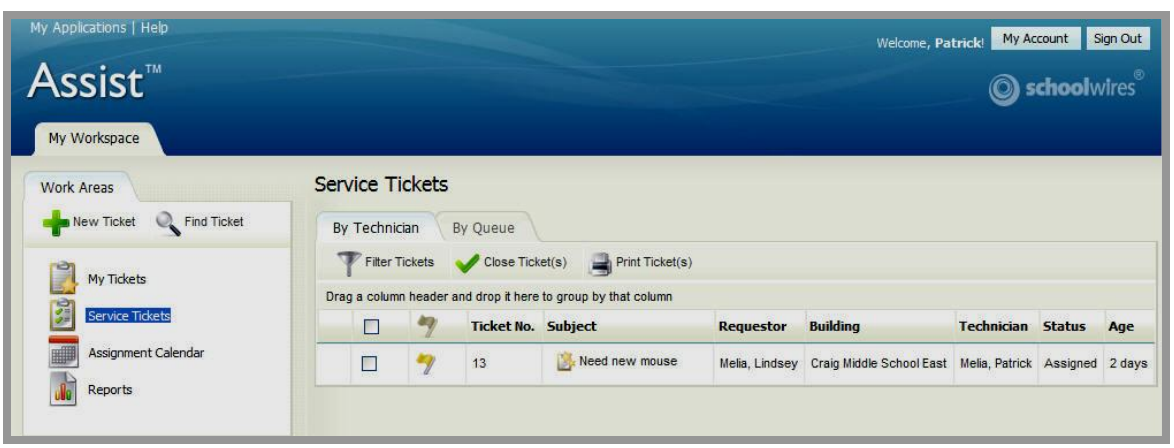


Figure 70: By Technician tab of the Service Tickets window for Technician Patrick

Tickets on the By Queue Tab of the Service Tickets Window

Depending on their building and queue assignments, what support staff will see on the *By Queue* tab of *Service Tickets* may vary. Let's look at the *By Queue* tabs of the *Service Tickets* windows of Craig, Viv and Patrick.

Figure 71 shows the *By Queue* tab of *Service Ticket* for Craig. Notice that it contains Ticket # 1, 4, 5, 6, 7, 8, 9, 10, 12 and 18. Figure 72 shows the *By Queue* tab of *Service Ticket* for Viv and contains the same tickets as that of Craig. Ticket # 18, however, does not show on the *By Queue* tab of *Service Ticket* for Patrick shown in Figure 73 because Patrick is not assigned to Craig Queue One. Viv and Craig are.

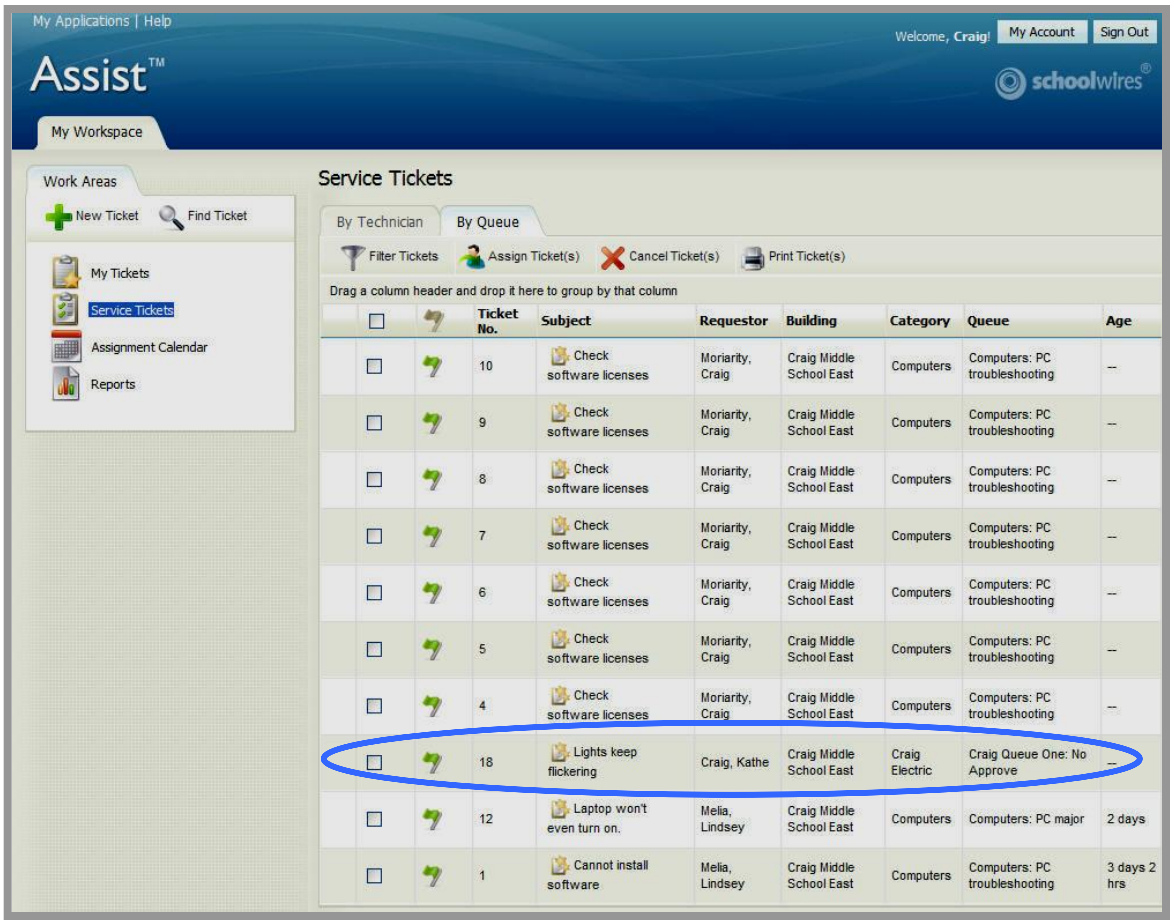


Figure 71: By Queue tab of the Service Tickets window for Manager Craig

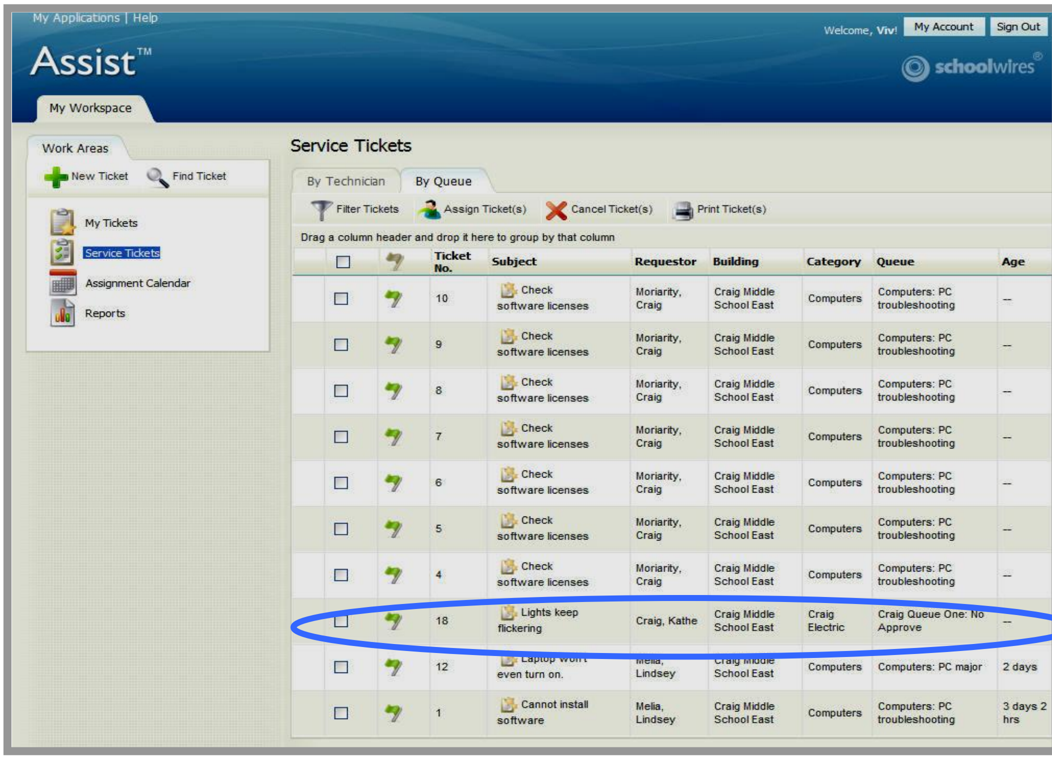


Figure 72: By Queue tab of the Service Tickets window for Technician Viv

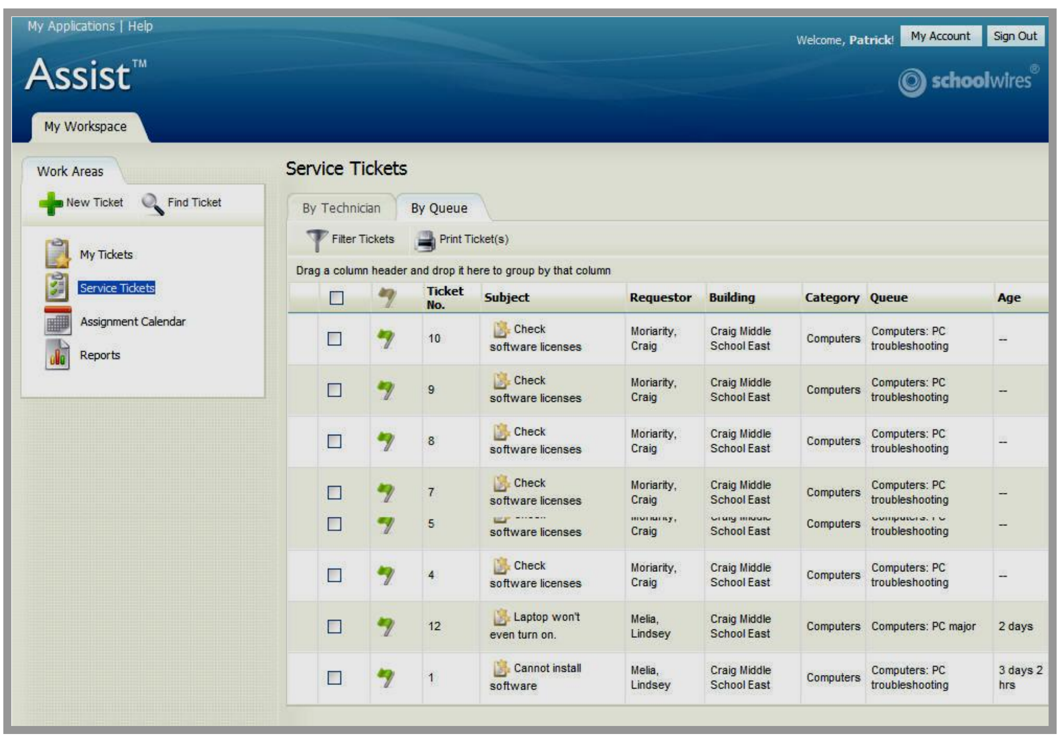


Figure 73: By Queue tab of the Service Tickets window for Technician Patrick

Comparing the By Technician and the By Queue Tabs

Compare the buttons that are available on the *By Technician* tab (Figure 68 and 69) to those that are available on the *By Queue* tab for Craig and Viv (Figure 71 and Figure 72). Remember, unlike Patrick, Craig and Viv can cancel and assign tickets.

The buttons that are available on the *By Technician* tab are:

- Filter Tickets
- Close Tickets
- Cancel Tickets (if that permission in user profile)
- Print Tickets

The buttons that are available on the *By Queue* tab are:

- Filter Tickets
- Assign Tickets (if that permission in user profile)
- Cancel Tickets (if that permission in user profile)
- Print Tickets

Since these tabs contain grids, you can apply all but the *Filter Tickets* button to one or more tickets on the page to tickets by clicking in the checkbox to the left of the tickets.

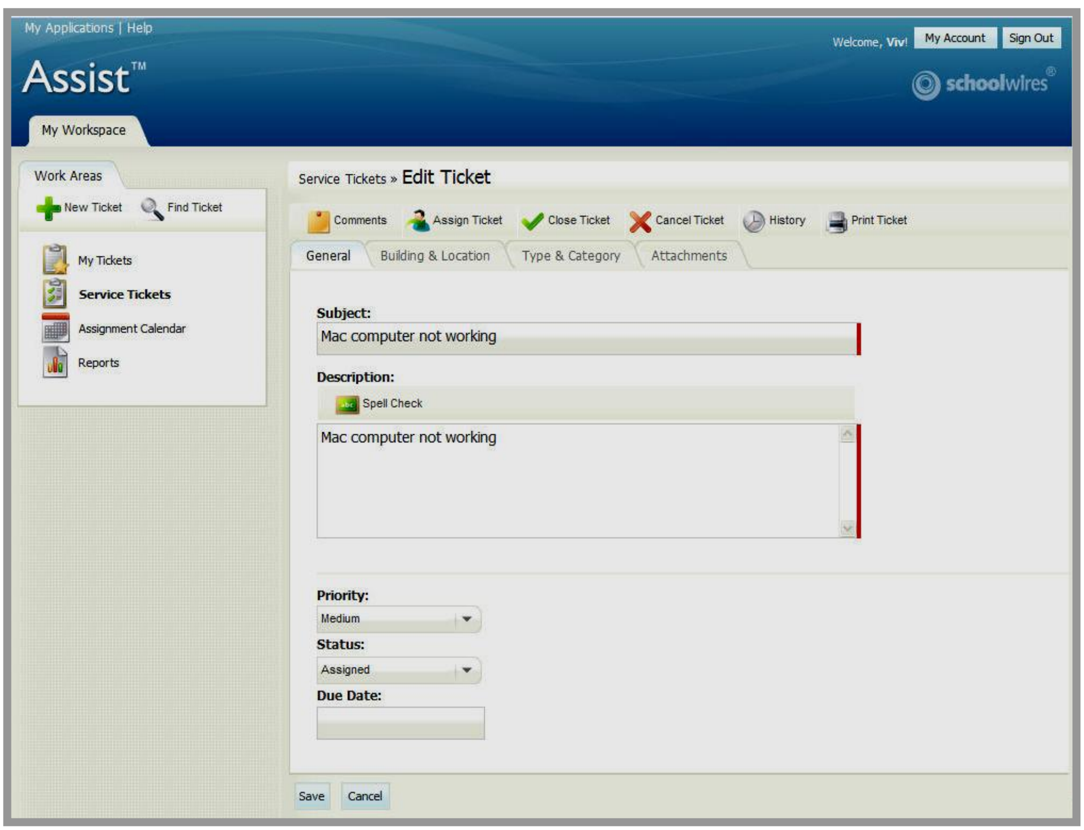


Figure 74: Editing a ticket while on the By Technician tab

As you can see in Figure 74, when you edit a ticket on the *By Technician* tab, the *Comments* and *History* buttons display. Therefore, when you edit a ticket on the *By Technician* tab, the buttons that are available are:

- Comments
- Assign Ticket (if that permission in user profile)
- Close Ticket
- Cancel Ticket (if that permission in user profile)
- History
- Print Tickets

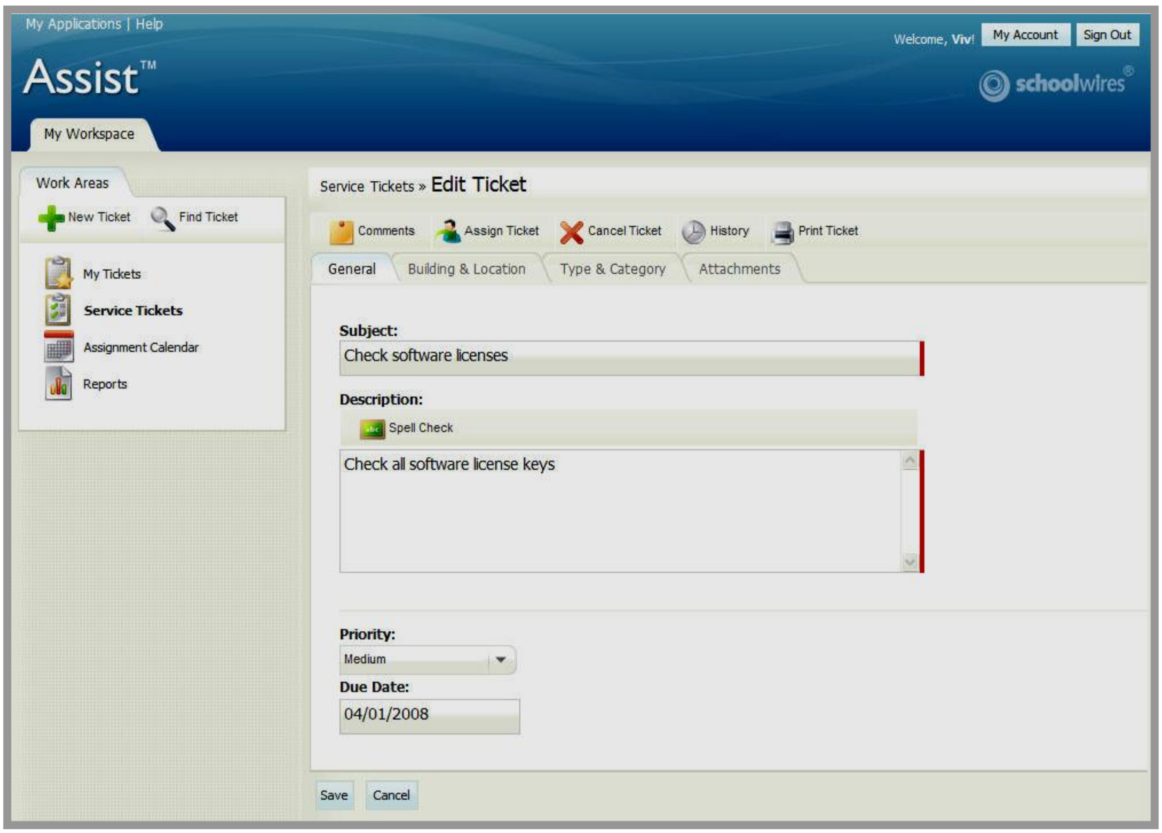


Figure 75: Editing a ticket while on By Queue tab

As you can see from Figure 75, when you edit a ticket on the *By Queue* tab, the *Comments* and *History* buttons will also display. Therefore, when you edit a ticket on the *By Queue* tab, the buttons that are available are:

- Comments
- Assign Ticket (if that permission in user profile)
- Cancel Ticket (if that permission in user profile)

- History
- Print Tickets

When you apply these buttons while editing a ticket, you are only performing the action on the ticket that you are editing.

By comparing editing a ticket on the *By Technician* tab (Figure 75) to editing a ticket on the *By Queue* tab (Figure 76), you will see that you can change the priority when editing a ticket on either tab, but you can only change the status when you edit a ticket on the *By Technician* tab.

Using the Ticket Click Menu in the Service Tickets Window

Accessing the Ticket Click Menu

You will access the ticket click menu in the *Service Tickets* window in the same manner as you access it in the *My Tickets* window or the *Approval Queue* window. You will click on the ticket subject as shown in Figure 76.

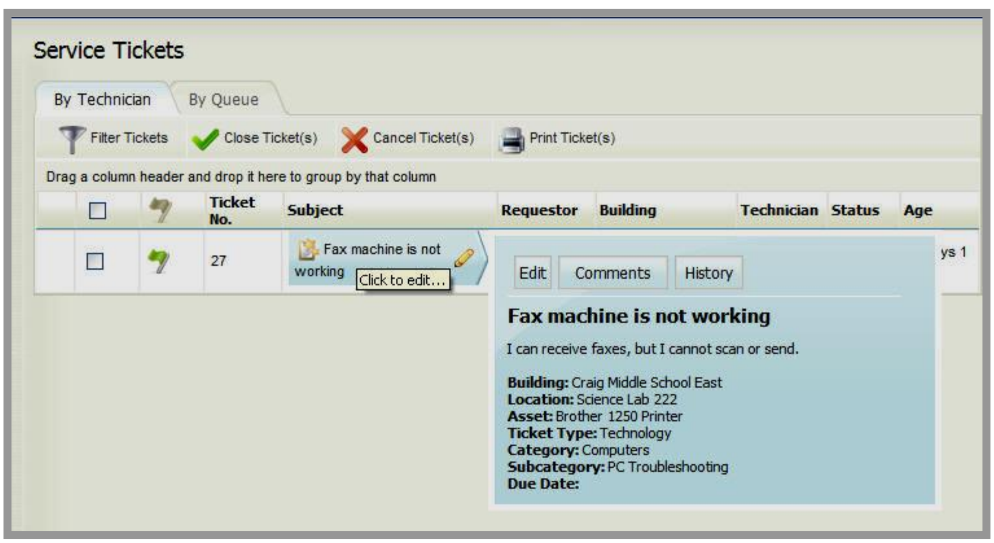


Figure 76: Ticket click menu in Service Tickets window

Editing a Ticket (Including Priority, Status and Due Date)

As a manager or technician you can edit all the information on a ticket. You can add attachments, delete attachments and download attachments.

TIP: You can also edit a ticket by double-clicking on the ticket subject. This will open an Edit Ticket window.

To edit a ticket from the ticket click menu:

1. Click on the *Edit* button in the ticket click menu. If you are editing a ticket on the *By Technician* tab, an *Edit Ticket* window like the one shown in Figure 77 will display. If you are editing a ticket on the *By Queue* tab, an *Edit Ticket* window like the one shown in Figure 78 will display.

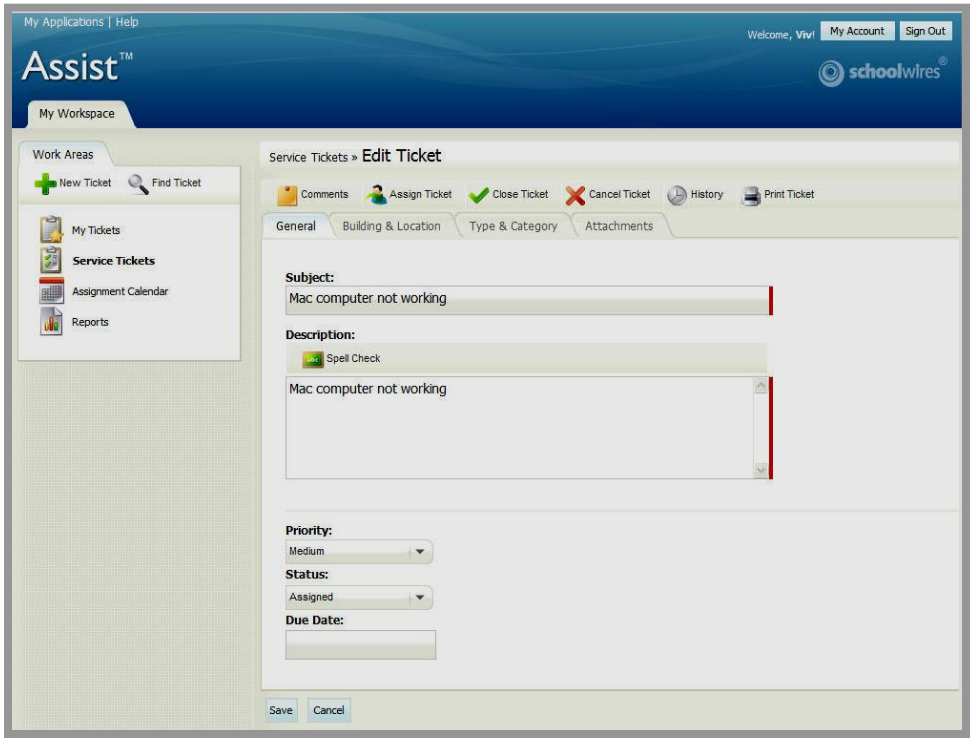


Figure 77: Editing a ticket while on the By Technician tab

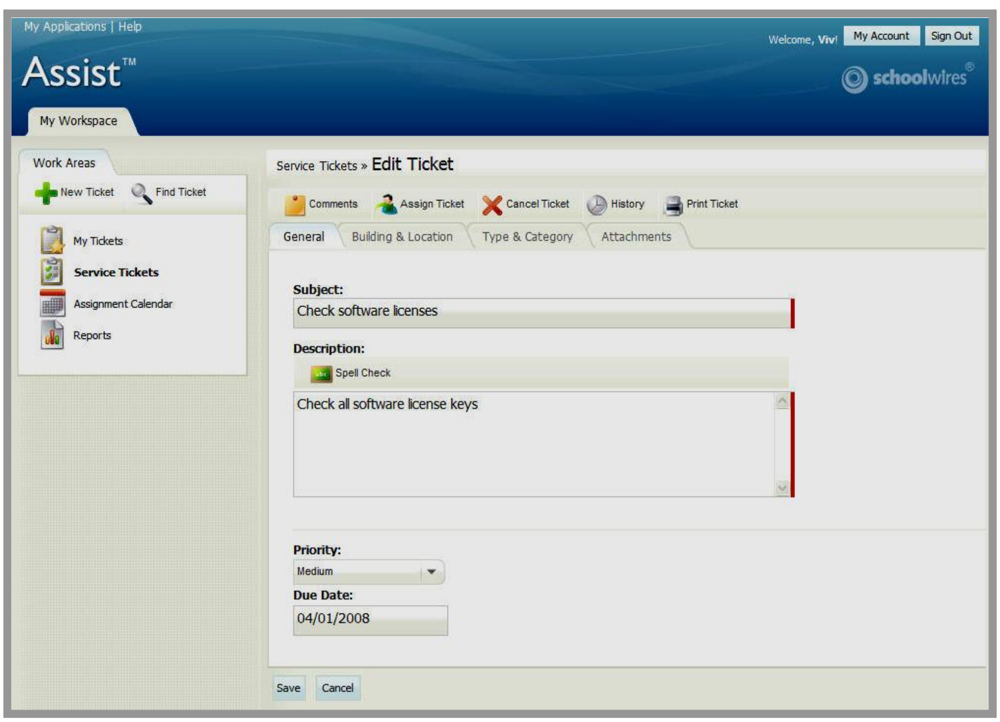


Figure 78: Editing a ticket while on By Queue tab

2. Change information on the General tab as required. As you can see from Figure 77 and 78, what that information is varies between the By Technician tab and the By Queue tab of the Service Tickets window.
   - Subject (when editing from either tab).
   - Description (when editing from either tab).
   - Priority (when editing from either tab). The choices are:
     - Low (blue flag in grid)
     - Medium (green flag in grid—default for all new tickets)
     - High (yellow flag in grid)
     - Critical (red flag in grid)
   - Status (when editing from *By Technician* tab only). The choices are:
     - Assigned
     - In progress
     - Pending
     - Hold
     - Awaiting third party
   - Due Date (when editing from either tab).
3. Change information on the *Building & Location* tab as required (when editing from either tab). Remember that the ticket was assigned to a queue, changing the building on the ticket may move it to the *Service Tickets* windows for technicians and managers assigned to that queue in the other building. The ticket may be removed from your *Service Tickets* window if you are not assigned to that building.
4. Change the ticket type, category or subcategory on the *Category* tab as required (when editing from either tab). Remember that changing the subcategory may change the queue or technician on that ticket. As a result, the ticket may be removed from your *Service Tickets* window.

5. Add, delete or download attachments on the *Attachments* tab. You do this in the same manner as a requestor or approver. As a technician or manager, you can make attachments viewable only to members of the support staff by marking them as internal attachments as shown in Figure 79.

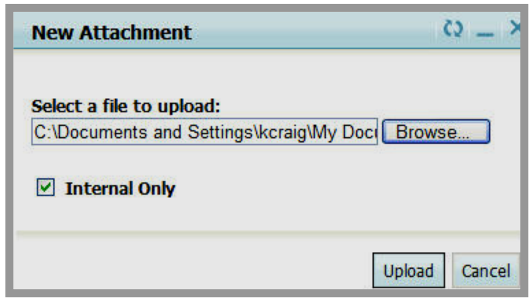


Figure 79: New Attachment window in the Service Tickets window

6. Click on the *Save* button. The *Service Tickets* window will return as the active window.

Adding Comments

Technicians and managers will add comments to tickets in the *Service Tickets* window in the same manner as requestors and approvers add comments—from the ticket click menu or while editing a ticket. As you can see from Figure 80, technicians and managers may add internal comments to tickets that cannot be viewed by requestors.

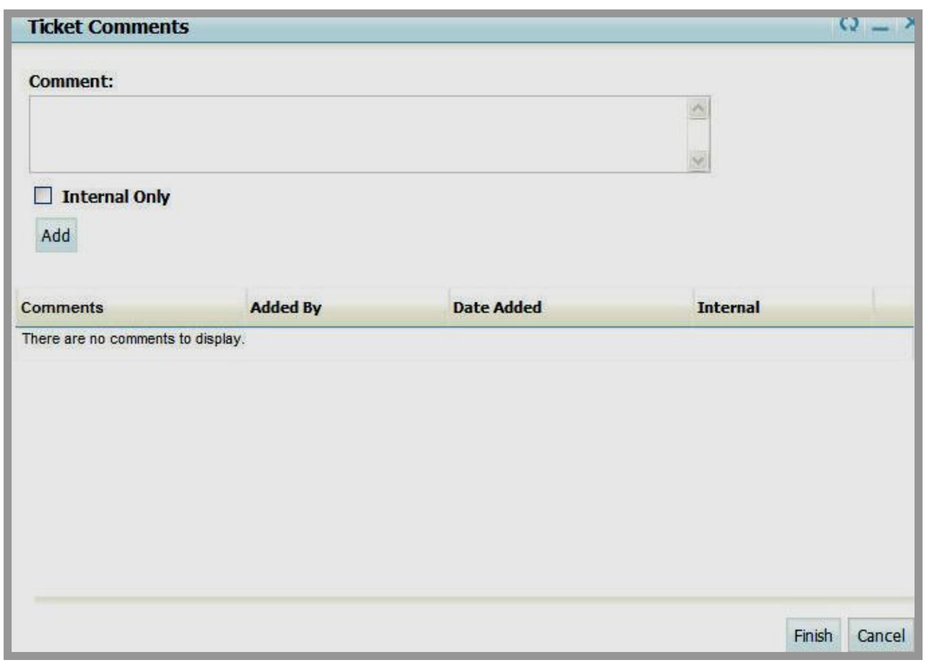


Figure 80: Ticket Comments window in the Service Tickets window

Viewing Ticket History

Technicians and manages will view history on a ticket in the same manner as requestors and approvers view history—from the ticket click menu or while editing that ticket. Click on the *History* button to view the ticket's history.

Using the Buttons in the Service Tickets Window

Filtering Tickets

Managers and technicians will filter tickets in the *Service Tickets* window in the same manner as requestors and approvers filter tickets.

However, as you can see from Figure 81 and Figure 82, technicians can only filter tickets on the *By Technician* tab by status while managers can filter on that tab by status and by technician. Both managers and technician can filter tickets on the *By Queue* tab by queue as shown in Figure 83.

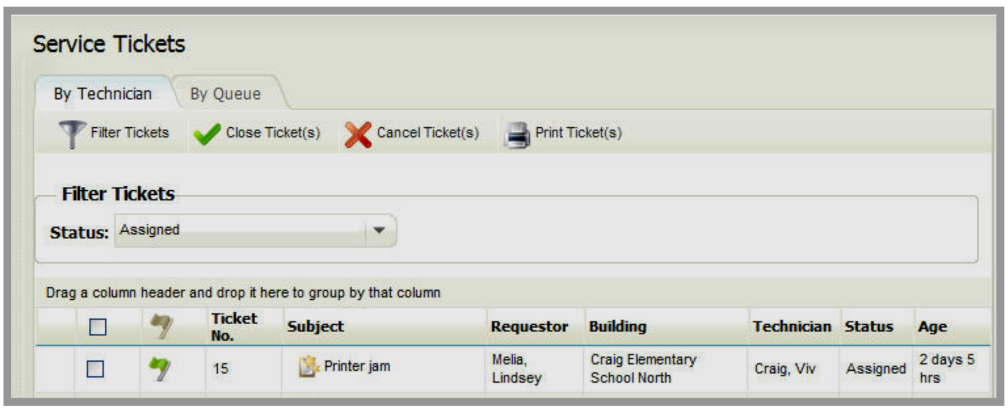


Figure 81: Filtering tickets on the By Technician tab for technicians

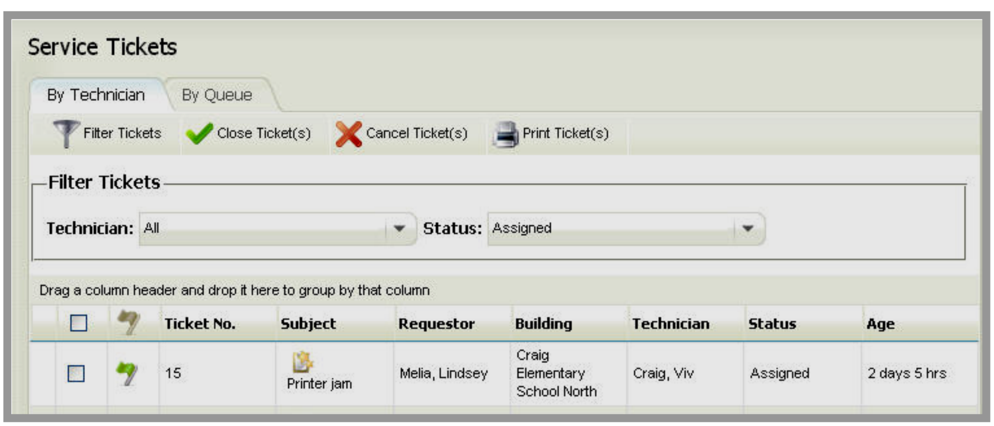


Figure 82: Filtering tickets on the By Technician tab for managers

Figure 83: Filtering tickets on the By Queue tab (for managers & technicians)

Closing a Ticket (From By Technician Tab Only)

You can close a ticket by clicking on the *Close Ticket* button when you are on the *By Technician* tab of the *Service Tickets* window. A *Close Ticket* window like the one shown in Figure 84 will display. Enter the reason you are closing the tickets. <u>You must enter at least 25 characters</u>.

<u>Note</u>: If you are closing multiple tickets from the grid, the same reason will appear on all the tickets you close.

The ticket status will change to Closed. However, since the default filter on the *By Technician* tab is set to display tickets with Assigned status, it will not be visible until you filter for closed tickets. The requestor will receive an email like the one shown in Figure 85. Clicking on the link in the email will take the requestor to a Ticket Completion Survey. See "Ticket Completion Survey" earlier in this chapter for how requestors complete this survey.

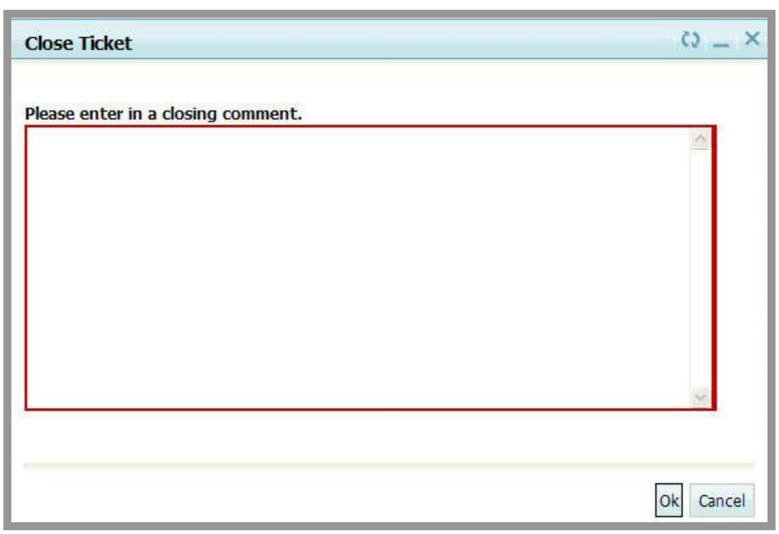


Figure 84: Close Tickets window

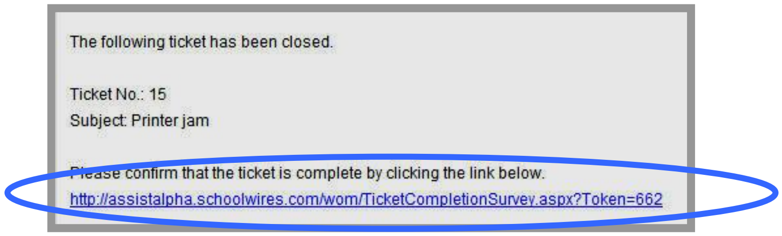


Figure 85: Email to requestor when ticket closed

Assigning a Ticket (From Either Tab)

If you have permission to assign tickets, you can assign a ticket by clicking on the *Assign Ticket* button when you are on either tab of the *Service Tickets* window and are editing a ticket. However, you can assign tickets from within the grid only on the *By Queue* tab.

To assign the ticket:

1. Access the desired tab of the *Service Tickets* window.
   a. If you are working on the *By Queue* tab, you can either select a ticket or tickets from the grid by clicking in the checkbox to the left of each ticket you wish to assign or you can edit the ticket you wish to assign.
   b. If you are working on the *By Technician* tab, you must edit the ticket you wish to assign.
2. Click on the *Assign Ticket* button. An *Assign Ticket* window like the one shown in Figure 86 will display.

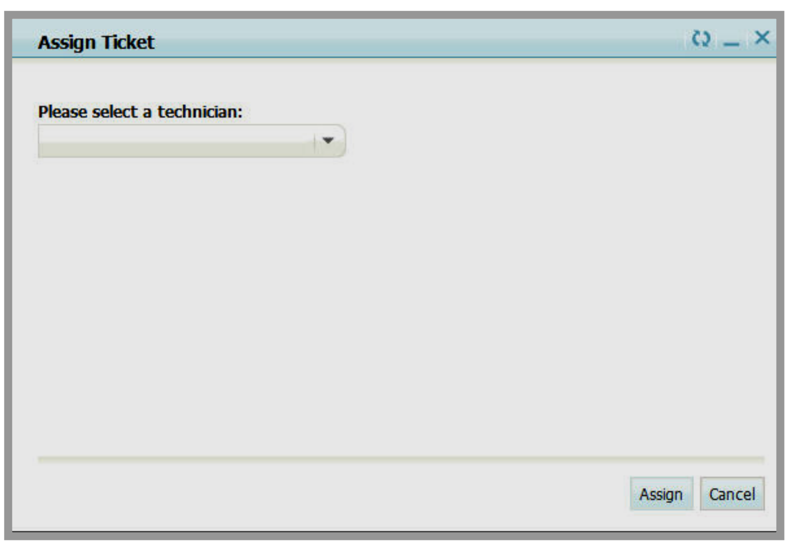


Figure 86: Assign Ticket window

3. Choose a technician from the combo box.

a. If you are working on the *By Technician* tab of the *Service Tickets* window, the list of available technicians will contain the names of all support staff (managers and technicians) who are assigned to the building on the ticket.

b. If you are working on the *By Queue* tab of the *Service Tickets* window, the list of available technicians will contain the names of all support staff (managers and technicians) who are assigned to the queue at the building on the ticket.

4. Click on the *Assign* button. The tab on which you began will return as the active window.

Cancelling a Ticket (From Either Tab)

If you have permission to cancel tickets, you can cancel a ticket by clicking on the *Cancel Ticket* button when you are on either tab of the *Service Tickets* window. A *Cancel Ticket* window like the one shown in Figure 87 will display.

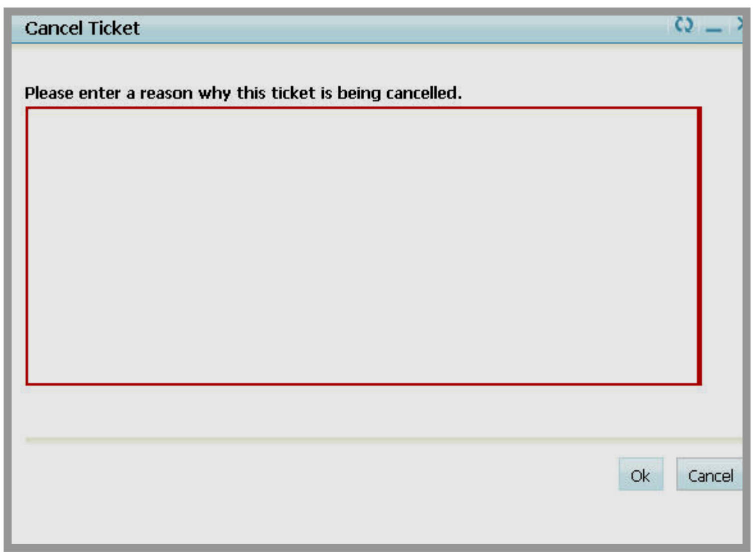


Figure 87: Cancel Ticket window

Enter the reason you are cancelling the ticket. <u>You must enter at least 25 characters</u>. The ticket status will change to Cancelled. However, since the default filter on the *By Technician* tab is set to display tickets with Assigned status, it will not be visible until you filter for cancelled tickets. The requestor will be notified that the ticket was cancelled.

<u>Note</u>: If you cancel multiple tickets from the grid, the same reason will be entered for all the tickets you cancelled.

Printing Tickets (From Either Tab)

Managers and technicians will print tickets in *Service Tickets* in the same manner as requestors and approvers print tickets.

Assignment Calendar (Managers and Technicians)

Once tickets are assigned and due dates are entered, they will appear on staff assignment calendars.

Tickets Seen in Calendars

As you can see from Technician Viv's Assignment Calendar in Figure 88, a technician will only see tickets that have been assigned to her on the assignment calendar.

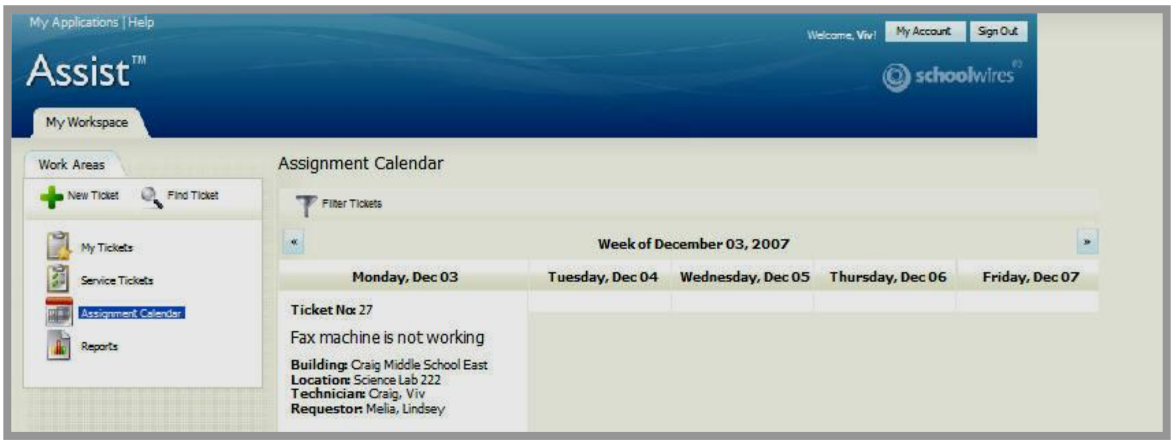


Figure 88: Technician Viv's Assignment Calendar

Managers, on the other hand, will see tickets for all technicians assigned to them as well their own tickets as you can see from Manager Craig's Assignment Calendar in Figure 89.

Figure 89: Manager Craig's Assignment Calendar

Filtering in the Assignment Calendar

Managers and technicians will filter tickets on the *Assignment Calendar* in the same way they filter tickets in *Service Tickets.* However, as you can see from Figure 90, technicians can only filter by the date while mangers can filter by the date and technician as shown in Figure 91.

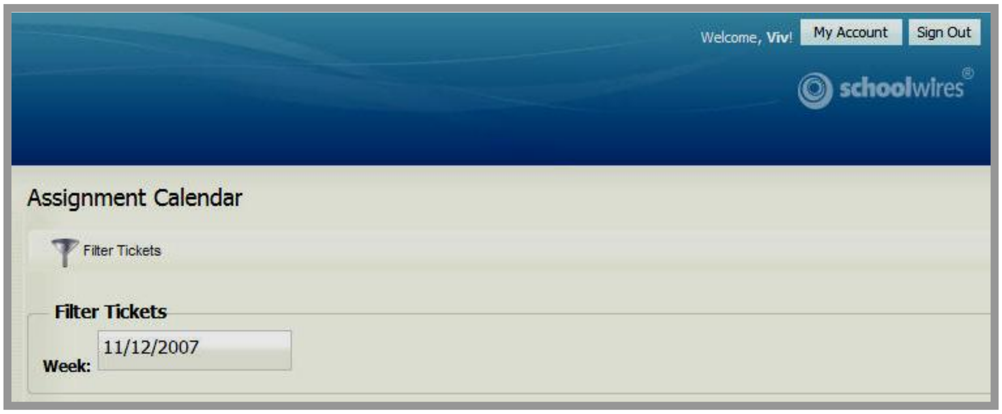


Figure 90: Calendar Filter for Technicians

Figure 91: Calendar Filter for Managers

Reports

Reports Available by Assist User Role

The reports available to each **Assist** user from the *Reports* task in the navigation pane are shown in Figure 92.

Report Title	Manager (Staff)	Technician (Staff)	Approver (Staff)
Ticket Summary	X	X	X
Total Tickets by Building	X	X	X
Total Tickets by Building & Category	X		X
Total Tickets by Building & Month	X		X
Total Tickets by Asset	X	X	X
Total Tickets by Category	X	X	X
Total Tickets by Subcategory	X	X	X
Total Tickets by Queue	X	X	X
Total Tickets by Approval Level	X		X
Total Tickets by Technician	X		X
Top Most Active Buildings	X	X	X
Top Most Active Locations	X	X	X
Top Most Active Requestors	X		
Top Most Active Assets	X	X	X
Assets Report	X		
Assets by Location	X		X
User Permissions	X		
Queue Membership	X		
Subcategories by Category	X		

Figure 92: Reports by Assist Staff Role

Obtaining Reports

As you can see from Figure 92, which reports you will see in the *Reports* window will depend on your role as a member of **Assist** support staff. However, you will obtain the reports in essentially the same manner.

Figure 93 shows the *Reports* window for a manager, which contains all available reports.

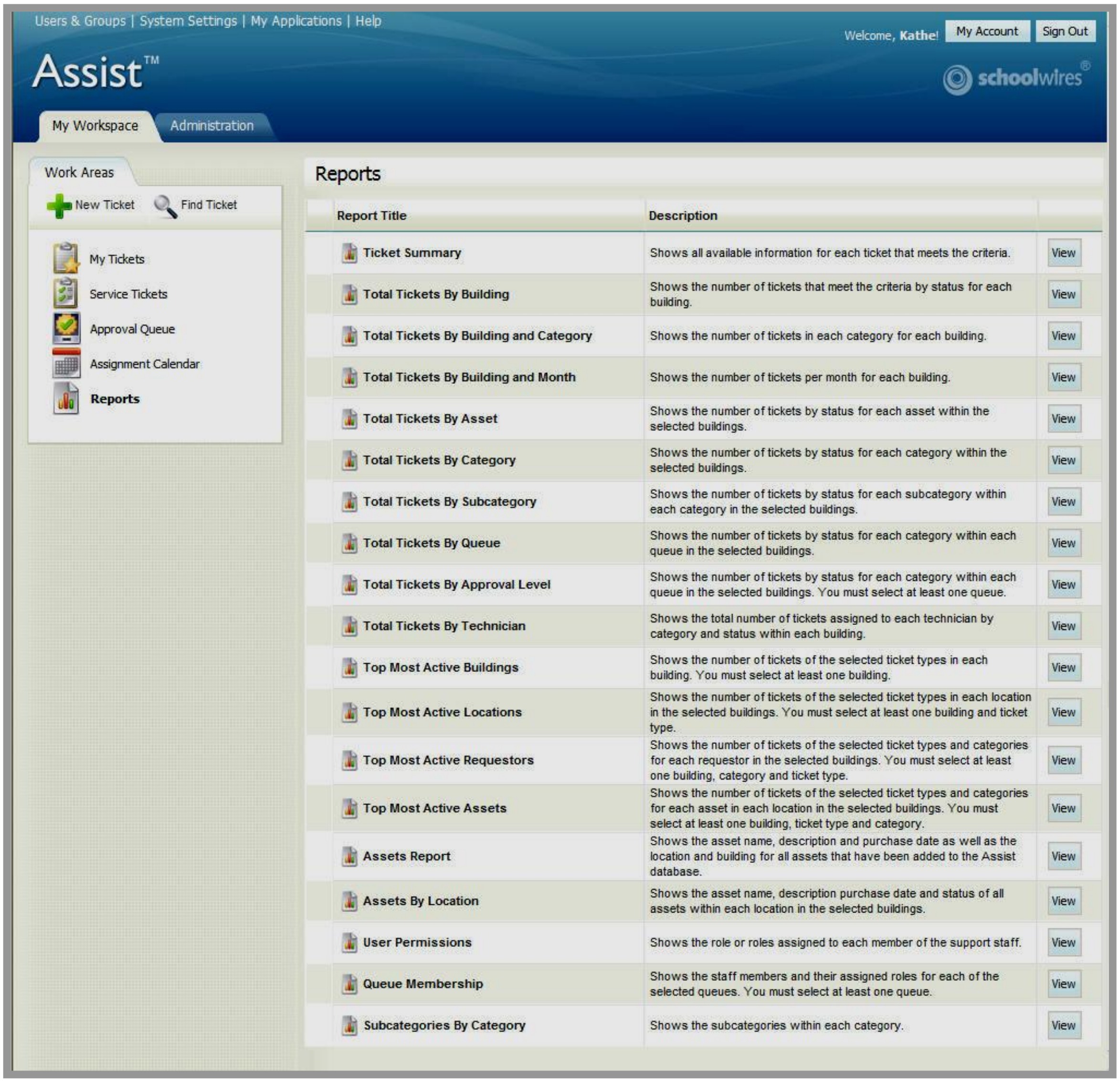


Figure 93: Reports window of manager

To obtain a report:

1. Click on the *View* button to the right of the desired report. A *Report Filter* window like the one shown in Figure 94 will display. Figure 94 shows the window for the Ticket Summary Report, which is available to all members of support staff. As you can see, you can filter by:
   - Buildings
   - Types & Categories
   - Priorities
   - Status
   - Date Range

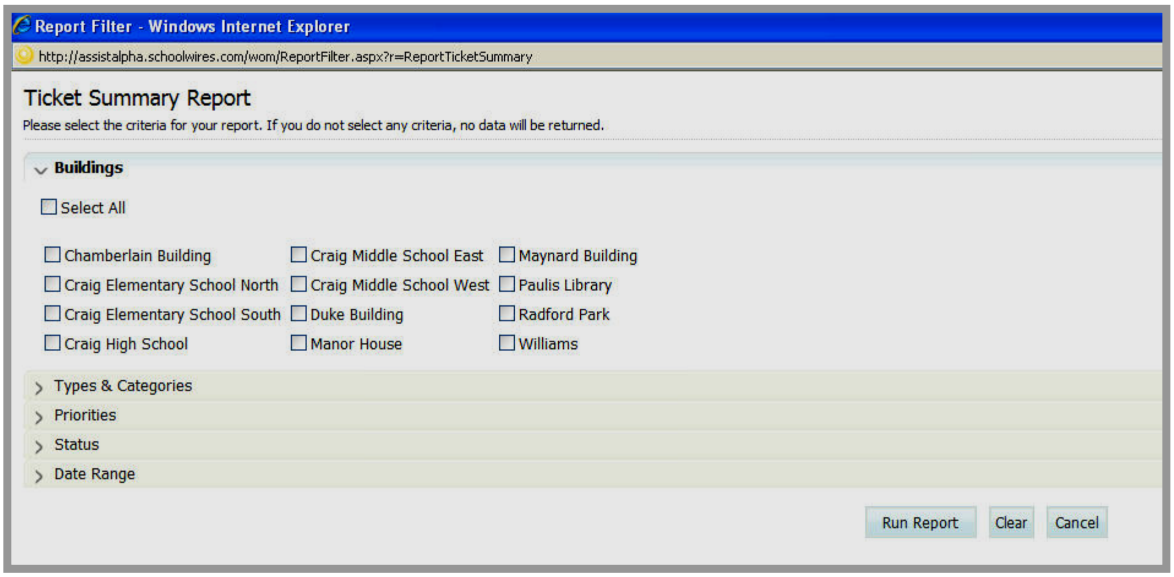


Figure 94: Ticket Summary Report Filter window

2. Choose your criteria by clicking in the checkboxes to the left of each criterion.

   Notes:

   - Expand each criterion class by clicking on .
   - Close each criterion class by clicking on .
   - To get data, you must select at least one criterion in each class except date range.
   - Some criterion subclasses are populated when you select a criterion. For instance, in Figure 95, notice that there are no criteria under the Category subclass. However when I choose a Type, that subclass is populated as you can see in Figure 9-96.

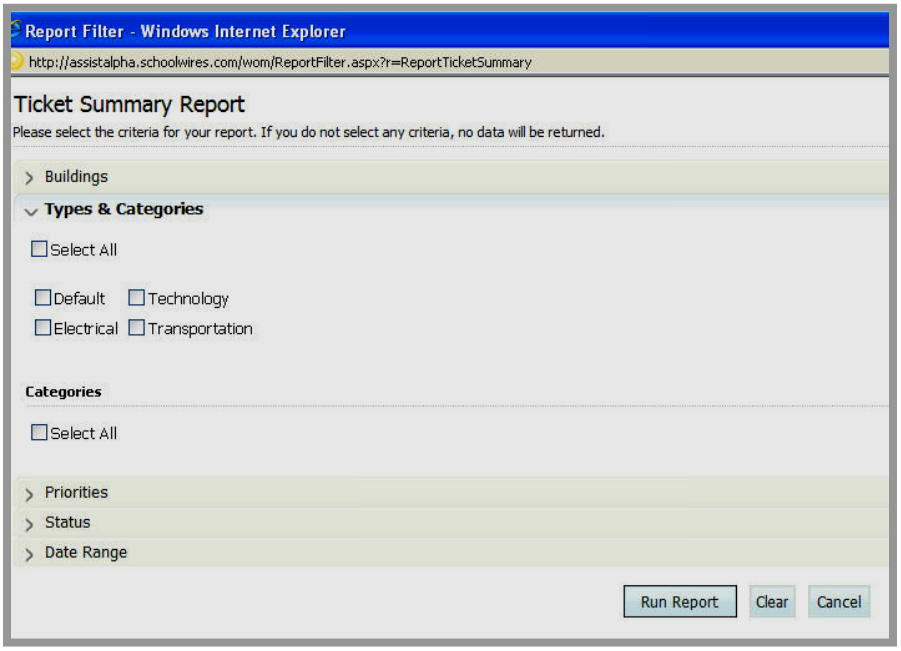


Figure 95: Category subclass not populated

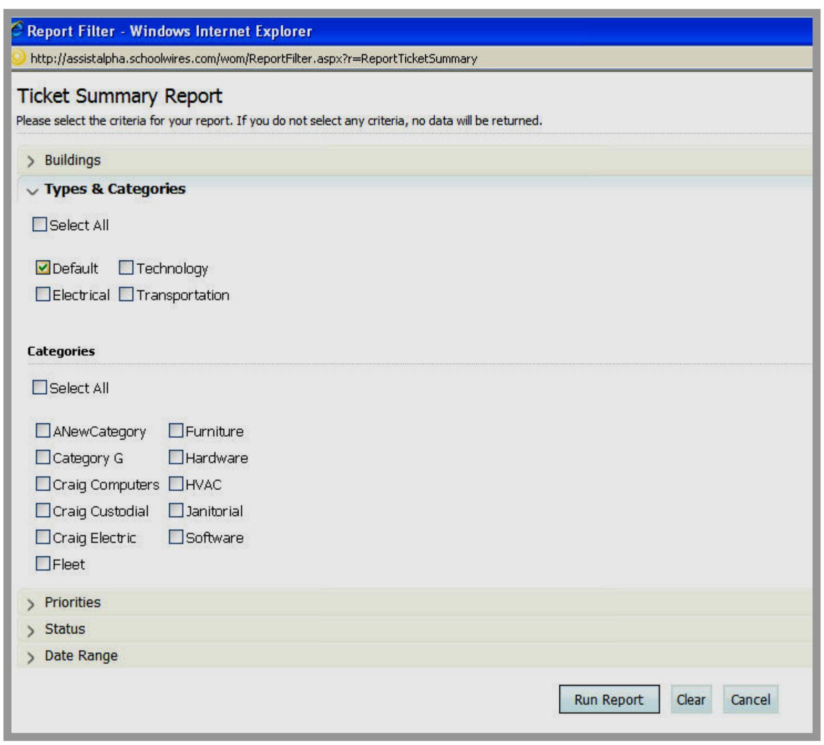


Figure 96: Category subclass populated

3. Click on the *Run Report* button. The report you ran will display. See Figure 97.

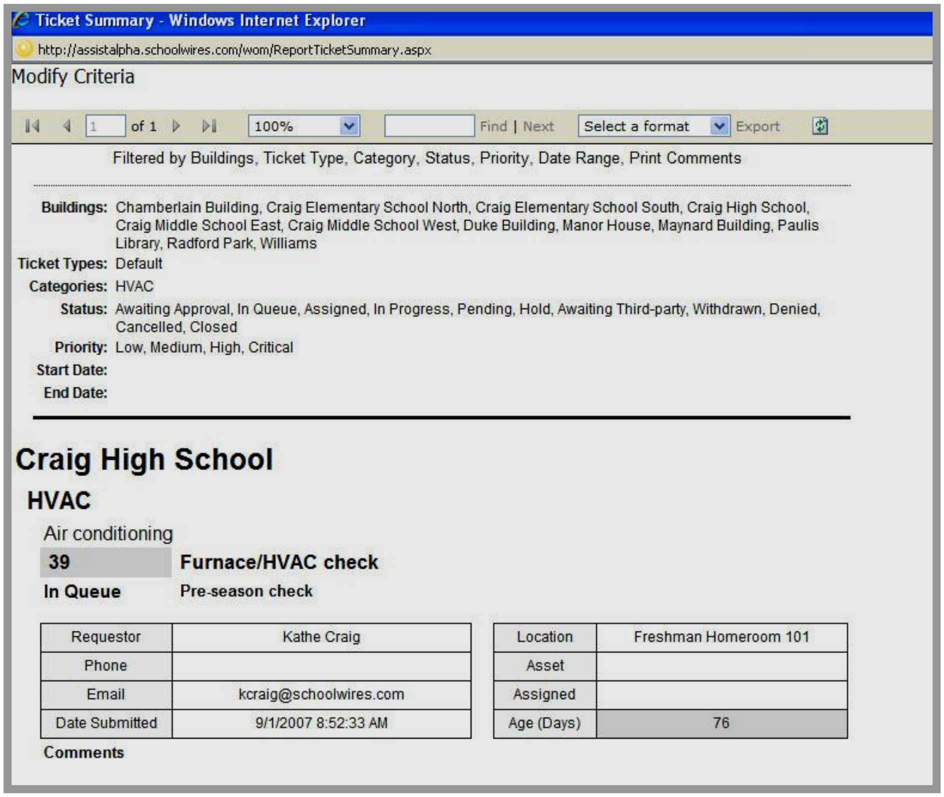


Figure 97: Report Results

4. If you wish to export the report:

   a. Choose a format for the export from the Select a format drop-down list. As you can see from Figure 98, you can export it as a Microsoft® Excel file or an Adobe® PDF.

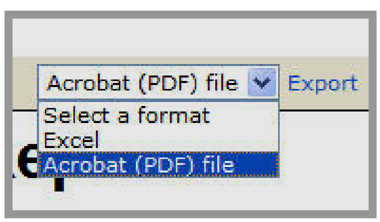


Figure 98: Export file formats

   b. Click on the *Export* link.

   c. Open or save the file as desired.

5. You can also modify the criteria for your report by clicking on the *Modify Criteria* link at the top of the report. The original *Report Filter* window will display.

6. To clear the criteria:
    a. Click on the *Clear* button to clear the old criteria.
    b. Select new criteria and run the report.
7. You can drill down into some reports to get more information. For instance, look at the Total Tickets by Category Report shown in Figure 99. If you click on the Category name, you will get a Ticket Summary Report for that category like the one shown in Figure 100. Notice that you can return to the parent report by clicking on the Back to Parent link at the top of the report.

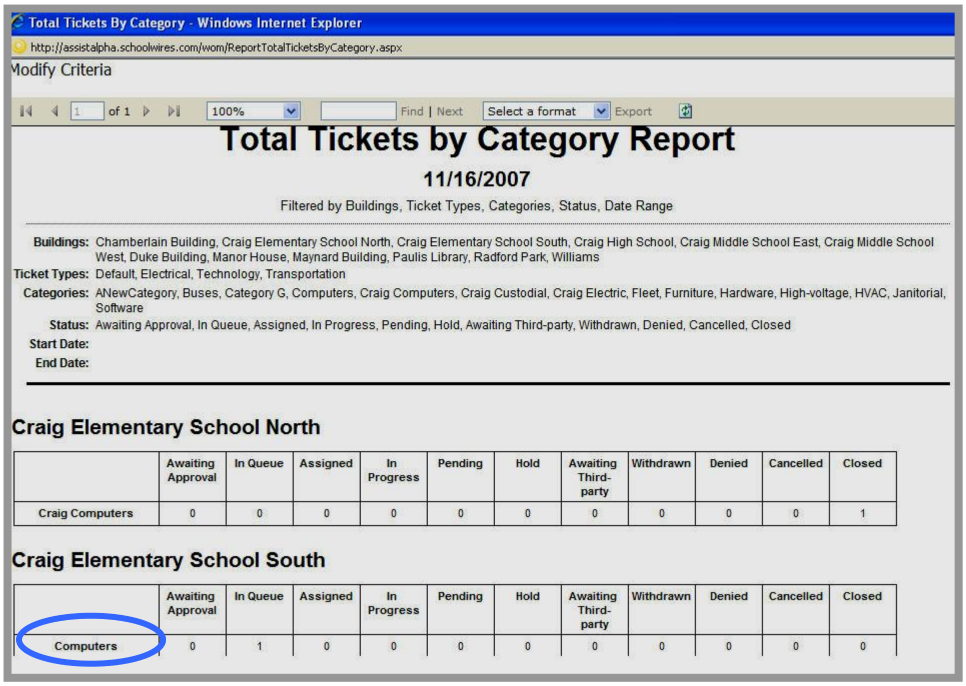


Figure 99: Total Tickets by Category Report

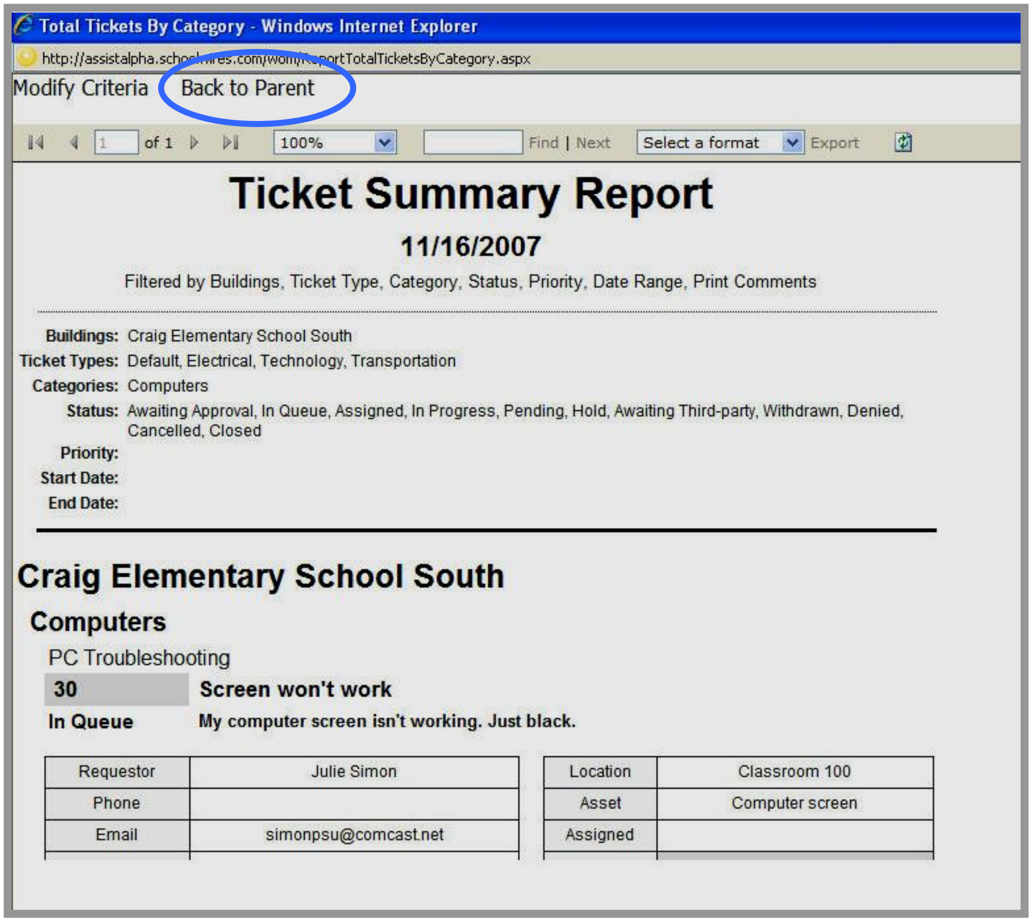


Figure 100: Ticket Summary for Category