

Version 11.4

End User Help Files



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GroupLink
563 West 500 South
Bountiful, UT 84010
801.335.0700
www.grouplink.com

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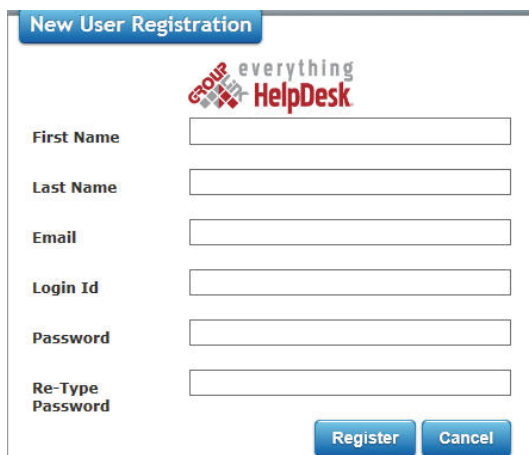
The eHD Application

As an End User in *everything* HelpDesk, you will have the ability to create and submit Tickets on any issues you may have in your organization. You will then be able to track the progress of the issues by viewing the Tickets you have created. The process is made easy using the My Tickets screen, where all of your Tickets can be displayed. A public Knowledgebase is also provided to help you with common issues.

Creating an Account

- Go to your support Login page. The URL for this page will vary depending on the web address designated in the HelpDesk system.
- Click the **New user? Register Here** link in the upper right-hand corner of the screen. You will be taken to the New User Registration screen (**Figure 1**).

Figure 1



The screenshot shows the 'New User Registration' form. At the top, there is a blue header bar with the text 'New User Registration'. Below this is the 'everything HelpDesk' logo. The form contains six input fields: 'First Name', 'Last Name', 'Email', 'Login Id', 'Password', and 'Re-Type Password'. At the bottom of the form are two buttons: 'Register' and 'Cancel'.

- Fill out the information on this screen, including a Login ID and Password you will remember.
- Click the Register button. You will receive a notification that you are now registered with *everything* HelpDesk and be immediately taken to the My Tickets screen.

Logging In

- Go to your support Login page. The URL for this page will vary depending on the web address designated in the HelpDesk system.
- Enter your **Login ID** and **Password**. If you do not already have a Login ID and Password, click the **New user? Register Here** link. This will launch a separate window where you will enter your personal information and create a new account. If the New User link does not appear because your organization uses LDAP integration, use the credentials provided by your System Administrator.
- To change your password after initial login, click on your username in the upper right-hand corner of the **HelpDesk** screen. Your **User Account** will pop up with your information, including a password text box. Delete the symbols that are currently in the text box and create your new password. For security reasons, this password is hidden. For more information, see the **My Tickets Screen** section.

- If you have forgotten your password, click the **Forgot your password?** link on the support login page. It will then prompt you to enter the email address you used to set up your **Help-Desk** account. Enter your email address in the text field and click the **Reset Password** button. An email will be sent to your inbox with a new password. Return to the support login page and enter your username and temporary password. Once you have logged in, click on your username in the upper right-hand corner of the screen and reset your password.

The eHD Menu

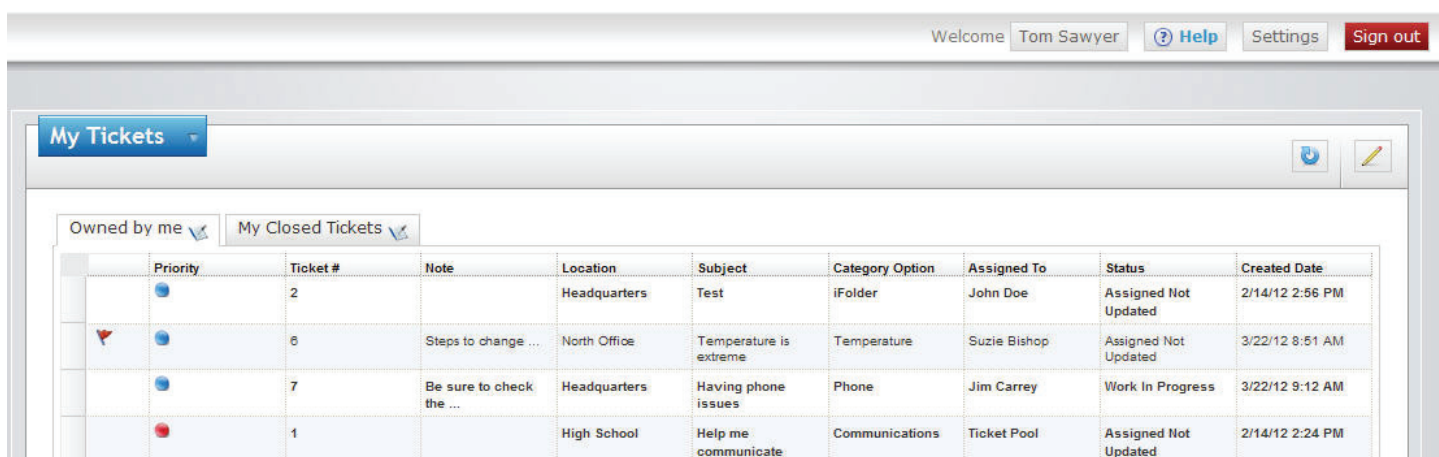
The *everything* HelpDesk displays a menu at the top of each screen in the application. The following tabs are shown in the menu:

- The **My Tickets** tab will take you to the My Tickets screen. This is also the first screen that will appear when you log into eHD. For more information, see the **My Tickets Screen** section of the Help Files.
- The **New Ticket** tab will open a blank Ticket for you to fill out. This is discussed in more detail in the **Creating a Ticket** section.
- The **Search** tab will take you to the Ticket Search screen. For more information, see the **Ticket Search** section.
- The **Filters** tab will take you to the Ticket Filters management page where you can apply, edit, or delete Ticket Filters. For more information, see the **Ticket Filters** section.
- The **Reports** tab directs you to the Reports management page where you can view, edit, or delete Reports. For more information, see the **Reports** section.
- The **Knowledgebase** tab will take you to the Knowledgebase screen where you can access public Knowledgebase articles on different topics. For more information, see the **Knowledgebase** section.
- The **Dashboards** tab will take you to the Dashboards page. Note that the dashboard tab will only appear and be accessible if your organization has purchased the dashboard feature of eHD. Further information can be found in the **Dashboards** section.
- The **Templates** tab will take you to the Ticket Templates page. This page is discussed in the **Ticket Templates** section of the Help Files.
- The **Help button** will open the Help Files in a PDF format with a navigable Table of Contents.
- The **Sign out** button will sign you out of the eHD application and should always be used before you close your web browser.

The My Tickets Screen

As mentioned above, the My Tickets screen (**Figure 2**) is, by default, the screen that opens when logging into eHD. The My Tickets screen in the latest release of eHD, version 10.0, is completely customizable to allow Users to view tickets based on individual Ticket Filters. The nine default field columns are no longer the only options available to view under each individual tab. To navigate to the My Tickets screen from any other screen in eHD click on the My Tickets tab.

Figure 2



	Priority	Ticket #	Note	Location	Subject	Category Option	Assigned To	Status	Created Date
		2		Headquarters	Test	iFolder	John Doe	Assigned Not Updated	2/14/12 2:56 PM
		6	Steps to change ...	North Office	Temperature is extreme	Temperature	Suzie Bishop	Assigned Not Updated	3/22/12 8:51 AM
		7	Be sure to check the ...	Headquarters	Having phone issues	Phone	Jim Carrey	Work In Progress	3/22/12 9:12 AM
		1		High School	Help me communicate	Communications	Ticket Pool	Assigned Not Updated	2/14/12 2:24 PM

The top, right corner of the screen will display your name. When this link is clicked, the User Account window (**Figure 3**) will pop up. This window has five sections of information.

Figure 3

Edit User

First Name: Suzie

Last Name: Bishop

Email: user@ehelpdesk.net

Active: ☒

Login Id: user

Change Password

History Comments

Location: East Office

Groupwise Login Id

Groupwise Password

Save Changes **Cancel**

Phones **+ CREATE NEW**

No phones created

Addresses **+ CREATE NEW**


No addresses created

Group Roles

No Roles created

- The first section consists of your display name, email address, and login information. The email address entered here will be the primary email address used in the application and will be used as a means of transporting information on Tickets. If you need to change your password, enter and re-enter your new password here. Also, if your organization is integrated with GroupWise for scheduling appointments and tasks directly from eHD, your GroupWise ID and password must be entered here. Any history comments made in the User Account window will be stored in this section as well.
- The Phones section lists all phone numbers associated with that user. A new phone number may be added by clicking the Create New button. To delete a phone number, click the red X next to the number you wish to delete and select yes to delete the item.
- The Addresses section lists all addresses associated with that user. To add an address, click the Create New button. To delete an address, click the red X located next to the address you wish to delete and select yes when asked if you are sure you want to delete the item.
- The Group Roles section will list all roles associated with that user. They will be listed by Group and by which Role that user has in each Group.
- If any changes were made to any of your information, click the **Save Changes** button before clicking the X in the upper, right-hand corner to exit the screen.



The My Tickets screen displays the **Owned By Me** tab (lists Tickets created by you), **My Closed Tickets** (lists Tickets you have created that have a Closed status), and as well as any other tabs that have been set up using the **Customize Tabs** button. The edit icon  that appears on each tab can be clicked to be taken to the Ticket Search page where you can quickly edit or drill down that tab's Ticket Filter to display your desired results.

By clicking the down arrow on the My Tickets button, the following two options will appear.

- Ticket Templates
- **Export:** Multi action button will will export your tickets into either
 - A PDF format or
 - An Excel spreadsheet

****Either format can be printed or saved and sent to others in your organization. You have the option of printing **All** or **Selected**.**



Ticket Tabs

The order of all tabs (including Custom Tabs) is dependent on the order given in the **My Tickets Tab** screen. Under each default tab, the tickets are listed with nine different columns: **Priority**, **Ticket #**, **Contact**, **Location**, **Subject**, **Category Option**, **Assigned To**, **Status**, and **Created Date**. Columns can be changed, added and edited with the help of the **Customize Tabs** button and individual **Ticket Filters**.

- For example, a Ticket Filter can be created to show all tickets the user has created that are open and which Technicians are working on them. The filter might be called My Open Tickets. The Estimated Completion Date search field can be added to the filter and it will appear as its own column in the My Tickets screen.

The order of your tickets in each tab is determined by the first column in the **Ticket Search** column order box.

- For example, if Priority is at the top of the list in your Ticket Search column order box, the tickets in your customized tab will be listed in order by Priority.

Each column, including customized columns, can be sorted in ascending or descending order. To sort a column, simply click on the column header. One click will sort in ascending order and another will sort in descending order.



Bolded Tickets

When a ticket is listed in bold print it is a new ticket and has not yet been updated.

Flagged Tickets

Tickets may have a red flag in the very first column of the ticket list, indicating the last update on the ticket was made by someone other than the logged in user.

Ticket Template Tickets

Tickets that are part of a Ticket Template will have a form down icon  if they are a parent ticket or a form up icon  if they are a child ticket.

View Individual Tickets

To access an individual ticket, double-click the desired ticket. It will open in a separate pop-up window allowing you to update the ticket as needed. You can also export the Ticket to a PDF file that will include the full audit trail.

You also have the ability to select certain tickets from the My Tickets screen by holding the Shift or Control keys and export multiple tickets at once.

Text Bubble View

If a subject, note, or any other value is longer than the width of its field, the text will trail off with ellipses. To view the full text of that field, hover it to view the text bubble (**Figure 4**) with the complete text of that field.

Figure 4



My Ticket Tabs


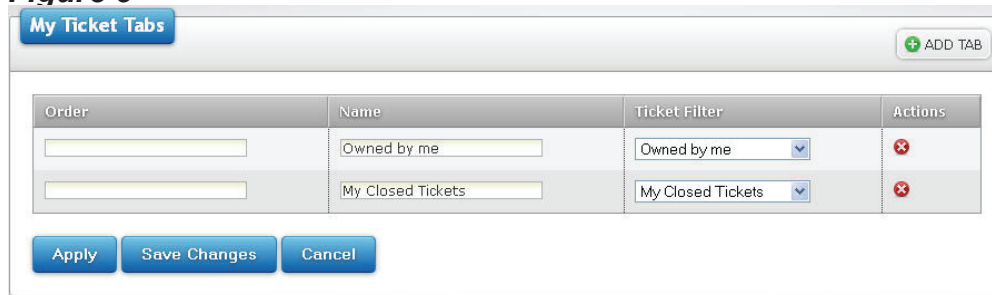


To customize your My Tickets screen, click on the **Customize Tabs**  button in the upper, right-hand corner of the My Tickets screen. This will take you to the **My Ticket Tabs** page (**Figure 5**).

Figure 5



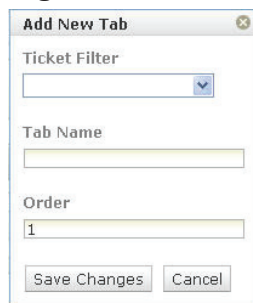
Order	Name	Ticket Filter	Actions
<input type="text"/>	Owned by me	Owned by me	
<input type="text"/>	My Closed Tickets	My Closed Tickets	

Apply Save Changes Cancel

ADD TAB

To add a new tab, click on the Add Tab icon. An Add New Tab pop-up will appear (**Figure 6**).

Figure 6



Add New Tab

Ticket Filter

Tab Name

Order

1

Save Changes Cancel

- Select the **Ticket Filter** you would like to create your new tab from. If you need to create a new filter, this should be done in the **Ticket Filters** screen before adding your new tab.
- Enter the name you would like your tab to be called in the **Tab Name** text field.
- Select the order in which you would like your new tab to appear. The lower the number in the order field, the further left your tab will appear in the My Tickets screen.
- Once you have filled in the necessary information, click the **Save Changes** button to add the new tab to the My Ticket Tabs list. If you do not wish to create the tab at this time, click the **Cancel** button. Either action will close the Add New Tab pop-up and take you back to the My Ticket Tabs page.

Here, all tabs can be edited as well.

- The first column under the Add Tab button is the Order column. To order all tabs, type the number corresponding to the tabs desired location on the My Tickets screen. The tabs will be shown from the lowest number to the highest, left to right.
- The Name column is where you can edit the Name of each individual tab.
- The Ticket Filter column is where you can change which filter a custom tab is created from. To change the filter, click the down arrow next to the existing filter name and select from the drop-down list the new filter you would like to use.
- At the end of each tab's row in the My Ticket Tabs page is a trash can icon. To delete a tab, click the trash can icon and click the **OK** button when asked if you are sure you want to delete the item. If you do not want to delete the tab, click the **Cancel** button.

Once you have made all the desired changes, click the **Apply** button. This will apply your changes and keep you in the My Ticket Tabs screen. Clicking the **Save Changes** button will apply your changes and direct you back to the My Tickets screen. To go back to the My Tickets screen without saving any changes you have made, click the **Cancel** button.

Creating a Ticket

Once you have logged into the eHD system, click the **New Ticket** button located in the menu. A New Ticket window will appear. Click the down arrow to select the Group the ticket needs to be sent to. If there is only one active group, that group will automatically fill in. The New Ticket is broken into five sections: Contact Information, Ticket Info, Description, Attachments and History Comments. (**Figure 7**).

New TicketNotify

* Group

Information Technology ▼

Save Changes

▼ Contact Information

* Contact

Miller, Shea (user) ▼

Email

smiller@grouplink.net

Phone

801-555-1234 (Office)

Address

123 E. Main Street
Bountiful, UT 12345
US

▼ Ticket Info

* Location

Headquarters ▼

Asset

* Category

* Category Option

* Assignment

▼ Description

* Subject

CC

BC

Note

▼ Attachments

Browse...

▼ History Comments

No comments

Contact Information

In the New Ticket window, your **Contact Information** is already filled in with the information in your User Account page. Your email address that is listed in this section can be used as a link to send a message to your email account

Ticket Information

You must fill in the Ticket Info (**Figure 8**) in order. The drop-down options for each category pre-determine which option(s) will appear in the drop-down for the next category.

Figure 8



▼ Ticket Info

* Location Asset

* Category

* Category Option

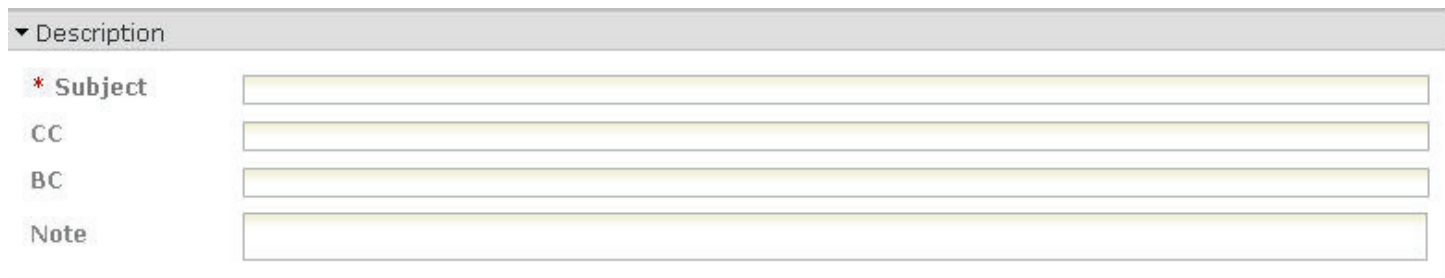
* Assignment

- **Location:** Choose the location that best describes the area where your problem exists. The location options can be based on Buildings, Business Sites, etc.
- **Category, Category Option, and Assignment:** Choose the appropriate options that apply to your problem from the drop-down lists for these three categories. Note that if there is only one option in the drop-down list, the name will be automatically selected for you.
- Other options can be added to the Ticket Info section as they are needed for your company or department. Fill in any other categories that have an asterisk (*) next to their name.

Description

- Fill out the **Subject** and **Note** (**Figure 9**) as you would an email. Give a short title to your problem in the Subject line, and then describe your problem in detail in the Note text box.
- You can attach a relevant file to your ticket by clicking **Browse**. Doing this will launch a pop-up window where you can navigate to files on your computer.

Figure 9



▼ Description

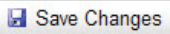
* Subject

CC

BC


Note

Be sure that you have filled in every required field (*). If required fields are not filled out, the Ticket will not save.

Once you have filled in all the relevant information, click **Save Changes** . This will submit your ticket which will now appear in the **Owned by me** tab in the My Tickets screen.

Created Ticket Information

Once tickets have been created, you can view and edit them. The following is a brief explanation of the contents of a created ticket.

The top of the Ticket contains information such as the ticket number, when it was created, who submitted the ticket, and when it was last modified (**Figure 10**). Next to the Ticket # is a refresh button .

This button should be clicked if the Ticket needs to be refreshed for any reason. **Pushing F5 to re-fresh will create a duplicate ticket with a new Ticket ID.** Three buttons also appear in this section:

Figure 10

Edit Ticket 1

Group
Information Technology

Created
Jul 6, 2012 2:11:04 PM
Modified
Jul 11, 2012 10:37:19 AM

Save Changes
Add comment
PDF
View this article

- The **Save Changes** button will save any changes or updates you have made to the ticket.
- The **Add Comment** button will allow you to add a comment to the ticket with any updates that have been made. There is also a multi-action drop down on the Add Comment button with the following options:
 - Received a phone call:** Selecting this option will open a comment with Received a phone call in the Subject line. Here, you can add a comment about the received phone call, add attachments pertaining to the phone call, and CC anyone to receive the information. When you are finished filling out the information, click the **Save Changes** button. If you do not wish to save the received phone call, click the **Cancel** button.
 - Placed a phone call:** Selecting this option will open a comment with Placed a phone call in the Subject line. Here, you can add a comment about the placed phone call, add attachments pertaining to the phone call, and CC anyone to receive the information. When you are finished filling out the information, click the **Save Changes** button. If you do not wish to save the received phone call, click the **Cancel** button
- The PDF button will open the ticket as a PDF document that can be printed, saved, or emailed to another person in your organization.

Four new sections will be added to the bottom of the Ticket as well (**Figure 11**): **History Comments**, **Sub-Tickets**, **Ticket Audit**, and **Survey Results**. These four sections record various status changes and actions that occur after the ticket has been created.

Figure 11

No comments

Attachments
Browse...

Sub-Tickets

NEW SUB-TICKET

#	Subject
7	This isn't working anymore. Please fix right away.
8	Is this working?

Ticket Audit

Field Name	From	To	On	By
Ticket Created			May 24, 2012 11:17:35 AM	admin
Submitted by			Jun 1, 2012 3:01:18 PM	admin
Asset			Jun 1, 2012 3:01:18 PM	admin
Status			Jun 1, 2012 3:02:52 PM	admin
Est. Compl. Date			Jun 1, 2012 3:02:52 PM	admin

Survey Results
Survey not submitted

History Comments

Whenever a change is made and saved on a Ticket, the person editing the Ticket is prompted with a **Note** textbox. The Note textbox is designed to allow the person editing the Ticket to explain and clarify why the Ticket is being changed or notify others about a related issue or problem. Attachments can be added to the note as well. The notes are recorded in the History Comments section where everyone who can view the ticket can see them. In this way, every ticket contains a history of explanations, concerns, etc., that pertain to that ticket.

Attachments

Click the Browse button to attach any documents that pertain to the ticket.

Sub-tickets

Tickets can be logged in a series of Parent and Child tickets. This feature enables tickets to be organized in a hierarchy. For example, if a ticket is logged concerning a virus that has spread department-wide, it is also very likely that other tickets will be logged that detail specific problems caused by that virus. All of these sub-problems stem from a single problem—the virus that has spread throughout a department. It is possible to create sub-tickets regarding the same problem by opening the existing ticket and clicking New Sub-Ticket under the Sub-Tickets heading. This will allow you to create a new ticket as a Child ticket to the initial problem. Once the sub-ticket is saved, it can be accessed under the Sub-Ticket section of the Parent ticket or by searching the Child Ticket number.

Ticket Audit

On every ticket there is a **Ticket Audit** section. The Ticket Audit is designed to record and time-stamp every change that is made on a ticket.

This section is designed by default to be collapsed. To see the Ticket Audit information, click on the blue triangle in the section header.

The Ticket Audit section has five different columns:

- **Field Name:** Records the field or category being changed. For example, if the audit trail is recording a change in Status for a ticket, **Status** will appear in the Field Name.
- **From** and **To:** These two columns record the actual change to the ticket—the change from one designation to another. For example, a status can change **from** Awaiting Dispatch **to** Work In Progress.
- **On:** Records the date and time the change was made.
- **By:** Records who made the change.

For example, if technician pparker changes the Status of a ticket **from** Assigned Not Updated **to** Work In Progress on June 15, 2010 (9:43 PM), the Ticket Audit will record it as shown in **Figure 12**.

Figure 12

Ticket Audit				
Field Name	From	To	On	By
Ticket Created			Feb 14, 2012 2:56:01 PM	manager

Survey Results

As an end user, you can be given the opportunity to fill out a survey after your ticket is solved. This allows HelpDesk administrators to run reports on customer satisfaction. The results of these surveys are attached to the bottom of the ticket so that, when viewing a ticket and its status changes, you can also view the end-user's response to the help desk process. If no survey has been taken for a Ticket, the Survey Results section will read *Survey not submitted*. More details can be found in the **Surveys** section.

Ticket Search

The Search tab is a tool that allows you to define criteria used for individual Ticket Filters. Using this tool you can search for tickets using multiple ticket fields including custom fields created by your organization.

To enter the Ticket Search (**Figure 13**), click on the Search tab at the top of the page.

Figure 13

The screenshot displays the Ticket Search interface. At the top, there is a navigation bar with tabs: New Ticket, Search, Filters, Reports, Assets, Knowledgebase, Dashboards, and Templates. The Search tab is active. Below the navigation bar, there is a header area with a search bar and a 'TICKET SEARCH' button. The main content area is divided into two sections: 'Ticket Filter' and 'Columns'.


The 'Ticket Filter' section contains a 'Filter Name' text field with the value 'New Filter' and a 'Mark as private' checkbox. Below this is a 'Choose a column to filter on' dropdown menu with a green plus sign button. The 'Columns' section contains a list of ticket fields: Priority, Ticket #, Location, Subject, Category Option, Assigned To, Status, Created Date, and Category. Each field has a corresponding input box.

Create a Filter

The Ticket Search automatically loads as a new filter. To name your filter type a new name in the **Filter Name** text field.

You have the option of making the filter private or public. Click the **Mark as Private** check box and the filter will only appear under your **My Filters** section of the Ticket Filters Page. Leave the check box blank and the filter will appear organization-wide under the Public Filters section of the Ticket Filters Page.

Field Selection Drop Down

Click the down arrow to Choose a column to filter on, then click the green plus sign  to apply. There are 19 Ticket Field boxes (**Ticket Number**, **Subject**, **Contact**, **Created Date**, etc.) by default. (If History Subject and/or Note are selected, the most recent History Subject/Note will be displayed.)



Once you have your Field Boxes added to the Ticket Search, you can define your search criteria. The first drop-down box in each Field box is a list of Boolean Operations that can be used to help define your search criteria. These operation choices are:

- Equals
- Not Equals
- Greater Than
- Less Than
- Contains
- Not Contains
- Starts With
- Ends With

The operations listed depend on the Field Box. Once you have chosen a Boolean Operation from the drop-down you can add your search criteria with text fields, drop-downs, or system searches in the different Field Boxes.

The **Created Date**, **Modified Date**, and **Estimated Completion Date** Field Boxes have search criteria options for Today, This Week, This Month, On, Before, After, Range, Last X Hours, Last X Days, Last X Weeks, Last X Months, and Last X Years. Select the criteria for your search and then enter in the date selection or numerical value and the search will be performed with your desired date criteria. This Week, This Month, Last X Hours, Last X Days, Last X Weeks, Last X Months, and Last X Years will all automatically update with the passing of time. For example, if you filter your search to show all open tickets created in the last 5 hours, this report will automatically update to be exactly 5 hours from the current time on the server.

Custom Field Selection

If your organization has Custom Fields, a **Custom Fields** section will show as many Custom Field boxes as your organization has created in the application. To access these fields, click the down arrow and scroll down to Custom Fields and the choices will appear.

If your organization has multiple Custom Fields with the same Field Label, only one Custom Field box will appear in the Field Selection Box. To distinguish between the different Custom Fields you will need to narrow your search criteria by including Category Option in your search.


Note: to search on checkbox Custom Fields, you must select the Equals or Not Equals option and enter **true** or **false** (not case sensitive). This information must be entered in English, regardless of the language the application is currently running in.

Survey Results Selection





In the same section, the Survey Results are available to search. When the down arrow is clicked you can scroll down to the Survey Question Field boxes available for your search:


- **Please rate your experience on a scale of 1 to 5, 1 being unsatisfactory, 5 being excellent**
- **Was your ticket answered in a timely manner?**
- **Was your ticket answered?**

Search Criteria

- **Drop-down criteria:** click any drop-down arrow and select the option you would like to search by. Once the option you select fills the drop-down box, click the **green plus sign**  located to the right of the item to add it to your search criteria. You can also type in the drop-down box to perform google-like searches in the drop-down options.

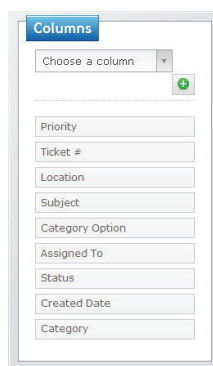


- **Text Field criteria:** type in any text field among the search boxes. To add your text as criteria for your filter, click the **green plus sign**  located at the end of the text field.
- **System Search criteria:** click on the **magnifying glass**  for Category or Category Option to launch a pop-up window that will list these search options in their hierarchical order. There will be a drop-down with two Boolean operation choices, Equals or Not Equals. By default Equals will be the Boolean operation selected in each drop-down. After choosing the Boolean Operation you desire click on the checkbox next to the Category or Category Option you would like to add to as your search criteria. Click **Apply** and the pop-up window will close and add the selected search criteria to the Field Box. (Note: the search method for Category and Category Option are presented in a separate pop-up window, allowing you to see the hierarchical order. In other words, you are not only able to see what Categories or Category Options are available. You are able to see what Group each Category belongs to, or see what Category or Category Option belongs to.) You can close this pop-up window at any time by clicking on the circular x icon in the top-left hand corner of the pop-up window.
- Click on the **magnifying glass**  for ZENworks Assets to launch a pop-up window with three text fields to search for ZENwork's assets: **Asset Name**, **Asset Type**, and **Operating System**. Enter your desired criteria and click on the **Search Button** to pull up specific ZENworks Assets that can be added as your search criteria. If you want to search all assets, you can leave the search boxes blank and click the Search Button. A list of ZENworks Assets that meet search parameters will appear in the pop-up window. The **Glasses Icon**  can be clicked on to view the ZENworks Asset Detail Page for that asset. Click on the checkbox next to the ZENworks Asset you would like to add to your search criteria, then click on the **Add Selected Assets to the Search Button**. The pop-up window will close and add the selected search criteria to the Field Box.

To remove any search criteria hover on the right side and click click on the **red delete sign**  located to the right of each option.

The **Column Order (Figure 14)** box defines how your search results will be displayed and initially sorted, assigning a column to each Field Box Label added. For example, if you add two Groups to your Ticket Filter but do not add the Field Box Label "Group" to the Column order box, the filter will still search for your selected Groups, but the search results will not assign Group its own column.

Figure 14



You can arrange the order of the items listed in the Column Order box by drag-and-drop. To move one item, simply click and drag it to the desired place.

The defaults for the results are **Priority**, **Ticket #**, **Location**, **Subject**, **Category Option**, **Assigned To**, **Status** and **Created Date**. Once you have selected all your search criteria, click one of the following options:

- **Apply Filter:** this will open a separate **Search Results** pop-up window with the results of the filter you created.
- **Save Filter:** this will save the Filter and add it to the Ticket Filter Page, where it can be managed and used for Dashboards, the My Ticket Screen, Graphical Reports, or a Ticket Search.
- **Reset Filter:** Choosing this option will clear any fields you have added and reset the Ticket Search to the default boxes of Priority, Ticket #, Location, Subject, Category Option, Assigned To, Status and Created Date.
- **Save As:** This will give you the option to save the filter you have created under a new name. This is useful when modifying an existing filter. You can add or delete fields as desired and save the changes you have made with a new name. This will keep the original filter as it was before

Apply a Filter

The Apply Filter button will open a separate **Search Results** pop-up window with the results of the filter you created. Note that you will only be able to see Tickets that you are the Contact for. In the results window you have the following options:

Figure 15

New Filter							
Export : Excel PDF							
	Priority	Contact	Ticket #	Subject	Category Option	Assigned To	Status
	Low	Clark Kent	8	Synchronize passwords	GroupWise	Peter Parker	Assigned Not Updated
	Low	Clark Kent	62	Is there any way to get ...	Annual Review	Ticket Pool	Awaiting Dispatch
	Low	Clark Kent	5	Mouse will not operate	Mouse	Peter Parker	Assigned Not Updated
🚩	Low	Clark Kent	6	I need to know the details ...	Health Insurance	Ticket Pool	Awaiting Dispatch
	Low	Clark Kent	2	No heat on the 4th floor	Heating	Wonder Woman	Assigned Not Updated
	Low	Clark Kent	3	Microsoft Office will ...	Microsoft Office	Peter Parker	Assigned Not Updated










- The tickets will be sorted according to the first search criteria listed in the column order in your Ticket Search screen. You can sort the tickets by the individual columns. For example, to list the ticket results by number in ascending order, click the Ticket # column header. To reverse the order, click the column header again.
- One or more tickets may be listed in bold. This means it is a new ticket that has not been worked on. Tickets may also have a red flag in the very first column of the ticket list indicating that the last update on the ticket was made by someone other than the logged in user.
- To view an individual Ticket, double-click the ticket you wish to open. The ticket will open in a separate window.
- The Ticket List can be exported to either an Excel spreadsheet or a PDF file.




Once you have created and saved a filter it will be listed in your **Ticket Filter** page where it can be applied, edited, or deleted. For more information, see the **Ticket Filters** section.

Ticket Filters

The **Ticket Filters** page (**Figure 16**) is a management page that lists all the **Private Filters** the logged in user has created as well as any **Public Filters** that have been created in the system. It was designed to allow for easy management of your Ticket Filters as they are used for the engine of the My Ticket Screen, Reports, and Ticket Search.




Figure 16

My Filters			+ CREATE NEW
Filter Name	Visibility	Actions	
My Closed Tickets	Private	  	
New Filter	Private	  	
Owned by me	Private	  	

Public Filters			+ CREATE NEW
Filter Name	Owner	Actions	
Test	SYSTEM ADMIN	  	

My Filters




The **My Filters** section of the page has a list of Filters that you, the logged in user, have created. These Filters are organized in rows with three columns: **Filter Name**, **Visibility**, and **Actions**.

- The **Filter Name** column lists (in alphabetical order) the ticket filter name that was created by that user.
- The **Visibility** column lists whether a filter is **Public**, indicating the filter is a public filter and therefore visible in the **Public Filters** throughout the application, or **Private**, indicating that the filter is a private filter, only visible to that user in the application.
- The **Actions** column lists three actions that can be taken for that particular Ticket Filter: **Apply**, **Edit**, and **Delete**.
 - If the **Apply** icon  is clicked, that particular Ticket Filter will be run and pulled up in the **Search Results** pop-up window for viewing and mass updating purposes.
 - If the **Edit** icon  is clicked, that particular Ticket Filter will be opened in the **Ticket Search** where it can be edited, changed, and re-saved.
 - If the **Delete** icon  is clicked, a pop-up message will ask “**Are you sure you want to delete this item?**” If you would like to delete the Ticket Filter, click the **Yes** button and it will be deleted from the application. If you do not wish to delete the filter, click the **Cancel** button. If the Filter is in use, it cannot be deleted. A message will appear when the delete icon is clicked indicating where the Filter is in use.

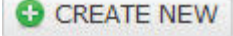


Public Filters

The **Public Filters** section of the page has a list of Filters that are public and visible to everyone throughout the application (based on the user's rights and privileges). These Filters are organized in rows with three columns: **Filter Name**, **Owner**, and **Actions**.

- The **Filter Name** column lists (in alphabetical order) the ticket filter name of that particular filter in the system.
- The **Owner** column lists the name of the individual that created or last updated the Public Filter. If the System Administrator created the Filter, the Owner's Name will be listed as SYSTEM ADMIN.
- The **Actions** column lists three actions that can be taken for that particular Ticket Filter: **Apply**, **Edit**, and **Delete**.
 - If the **Apply** icon  is clicked, that particular Ticket Filter will be run and pulled up in the **Search Results** pop-up window for viewing and mass updating purposes.
 - If the **Edit** icon  is clicked, that particular Ticket Filter will be opened in the **Ticket Search** where it can be edited, changed, and re-saved. If a Public Ticket Filter is edited and then saved, that Filter's new owner will be the last individual to edit it. It will then be listed in the **Public Filters** section of the **Ticket Filters** page for all users except the individual that edited it. For this user, it will be listed under the **My Filters** section of the Ticket Filters page with the **Visibility** listed as Public.
 - If the **Delete** icon  is clicked, a pop-up message will ask "**Are you sure you want to delete this item?**" If you would like to delete the Ticket Filter, click the **Yes** button and it will be deleted from the application. If you do not wish to delete the filter, click the **Cancel** button.

Create New Ticket Filter

To create a new Ticket Filter from the Ticket Filter page, click on the  in the top-right corner of the Ticket Filters page. This will take you to the **Ticket Search** page. For information on how to navigate the Ticket Search page please see the Ticket Search section.

Reports

The **Reports Page** (*Figure 17*) is a management page that lists all the **My Reports** (private Reports the logged in user has created), as well as any **Public Reports** that have been created in the system. It was designed to allow easy management of your graphical reports and the ability to create automatic, scheduled reports. This tool is also the power behind eHD's Dashboard feature.

Figure 17



My Reports

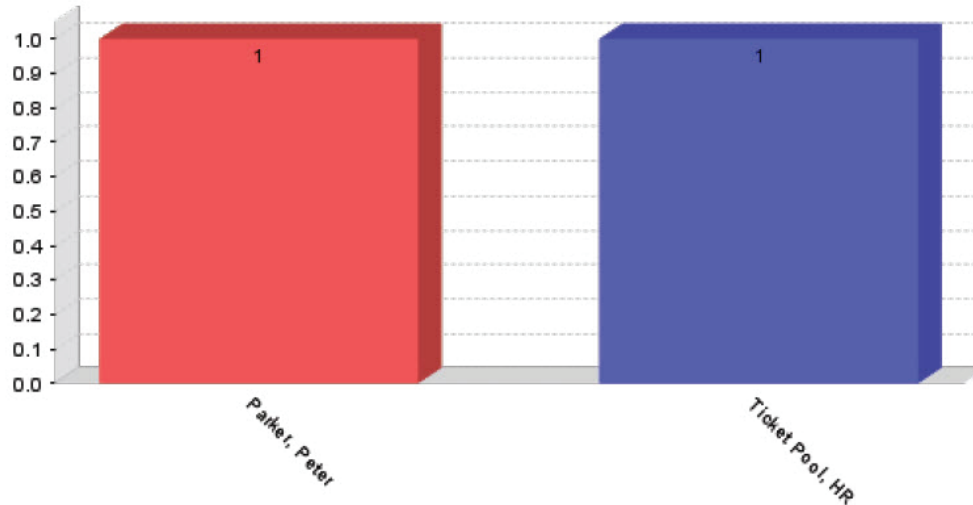
The **My Reports** section of the page has a list of Reports the logged in user has created. These Reports are organized in rows with three columns: **Report Name**, **Visibility**, and **Actions**.

- The **Report Name** column lists the report name that was created by that user.
- The **Visibility** column lists whether a report is
 - **Public**, indicating the report is a public report and therefore visible in the **Public Reports** throughout the application, or
 - **Private**, indicating the report is private and only visible to that user in the application
- The **Actions** column lists three actions that can be taken for each Report: **View**, **Edit**, and **Delete**.
 - If the **View** icon is clicked, that particular Report will be run and pulled up in the **Report Results** pop-up window for viewing purposes (*Figure 18*).



Figure 18

IT Group

	#	%	WorkTime
Parker, Peter	2	40.00 %	00:00:00
Ticket Pool, HR	1	20.00 %	00:00:00
Parker, Peter	1	20.00 %	00:00:00
Ticket Pool, HR	1	20.00 %	00:00:00
Grand Total:	5		00:00:00






Individual tickets can be accessed through a report by drilling down the information you have reported on and clicking the Ticket number.

- If the **Edit** icon  is clicked, that particular Report will be opened in the Report Editing screen where it can be edited, changed, and re-saved.
- If the **Delete** icon  is clicked, a pop-up message will ask “**Are you sure you want to delete this item?**” If you would like to delete the Ticket Filter, click the **Yes** button and it will be deleted from the application. If you do not wish to delete the filter, click the **Cancel** button.

Public Reports

The **Public Reports** section of the page has a list of Reports that are public and visible to everyone throughout the application (based on the user’s rights and privileges). These Reports are organized in rows with three columns: **Report Name**, **Owner**, and **Actions**.

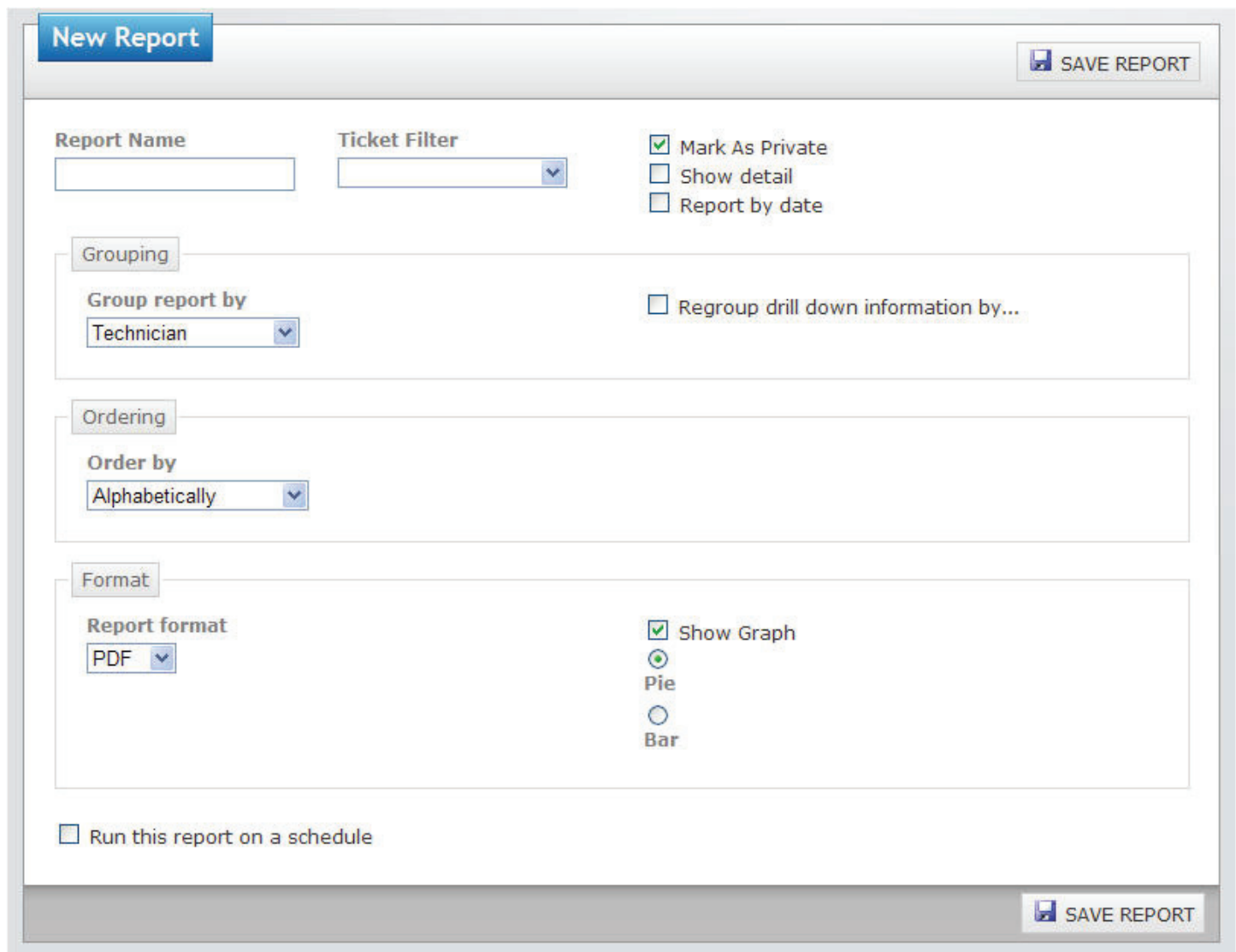
- The **Report Name** column lists (in alphabetical order) the name of that particular report in the system.
- The **Owner** column lists the name of the individual that created or last updated the Public Report. If the System Administrator created the Report the Owner’s Name will be listed as SYSTEM ADMIN.
- The **Actions** column lists three actions that can be taken for that particular Report: **View**, **Edit**, and **Delete**.
 - If the **View** icon  is clicked, that particular Report will be and pulled up in the **Report Results** pop-up window for viewing purposes.

- If the **Edit** icon  is clicked, that particular Report will be opened in the Report Editing screen where it can be edited, changed, and re-saved. If a Public Report is edited and then saved, that Report's new owner will be the last individual that edited it. The report will be listed in the **Public Reports** section of the Reports page for all users except the individual that edited it. For this user, it will be listed under the **My Reports** section of the **Reports** page, with the **Visibility** listed as public.
- If the **Delete** icon  is clicked, a pop-up message will ask “**Are you sure you want to delete this item?**” If you would like to delete the Ticket Filter, click the **Yes** button and it will be deleted from the application. If you do not wish to delete the filter, click the **Cancel** button.

Create New Report

To create a new Report from the **Reports** page click  **CREATE NEW** button in the top-right corner of the page. This will take you to the **New Report** page (**Figure 19**).

Figure 19



New Report SAVE REPORT

Report Name

Ticket Filter

☒ Mark As Private

☐ Show detail

☐ Report by date

Grouping

Group report by

☐ Regroup drill down information by...

Ordering

Order by

Format

Report format

☒ Show Graph




☐ Pie

☐ Bar

☐ Run this report on a schedule

SAVE REPORT

Fill out the information on the New Report page

- **Report Name:** Give a name that will properly reflect the Report.
- **Ticket Filter:** Select the Ticket Filter you would like to create the Report from.
- **Report by date:** If you would like to Report on tickets for a certain period of time, be sure this box is checked. It will then provide a drop down with the choices to **Order by** the **Day**, **Week**, **Month**, or **Year**. If you wish to show all tickets, leave this box unchecked.
- If the Report by date option is not selected, you have the option to run the report grouped by a specific criteria by clicking the **Group report by** drop-down and selecting one of the following options:
 - **Group**
 - **Location**
 - **Category**
 - **Technician**
 - **Priority**
 - **Status**
 - **ZENworks 10 Asset**
- You can then regroup the report results after you have drilled down into a grouped report by clicking on the **Regroup drill down information?** checkbox. Clicking this checkbox will load another drop-down box titled By. This drop-down has the same possible options as the **Group report by** options listed above.
 - For example, if you want to show all tickets that belong to your IT Group and organize them by technician, then by priority, open the **Ticket Search**, click the down arrow and select **Group**, click the green plus icon  Save the Filter under the name IT Group.
 - Click the Reports icon at the top of the screen to be taken to the Reports Management page. Click the circular Green Plus icon  at the top of the page to navigate to the New Report screen and add a new report.
 - Name your report and select the IT Group ticket filter from the **Ticket Filter** drop-down. Select Technician from the **Group report by** drop-down and check the **Regroup drill down information** checkbox. When the By drop-down appears, select Priority from the list. Next, select the Bar graph radio button and check the **Show Graph** checkbox. From the **Report format** drop-down select PDF and Alphabetically from the **Order by** drop-down.
 - Once you have defined your report, click the **Save Changes** button in the top-right corner of the Reports screen. This will take you back to the Reports Management page where you can choose to View, Edit, or Delete your new report. Click the View  icon and the Report will open in a new window and will be grouped by technician, showing the total number of tickets assigned to the technician, the percentage of all the Group's tickets that it represents, and the ticket's work times. You can click on a technicians name to drill-down and regroup that technician's ticket by priority. To see the tickets in each priority for that technician, click one of the priorities and the ticket details will appear, allowing you to pull up the ticket from the Ticket ID or email the technician it is assigned to by clicking on the Assigned to name.



- **Show Graph:** If you would like to show a graph of the selected ticket template, check this box. Then select whether you want the results displayed in a Pie chart or a Bar graph.
- **Order by:** Select how you want the tickets ordered in your report. The following options are available:
 - **Alphabetically:** The results will be listed by technician in alphabetical order.
 - **Greatest # of Tickets:** The technician with the greatest number of tickets will be listed first followed by the next highest and so on.
- **Report format:** Select from the drop-down menu which format you would like the report results displayed in. The following options are available for reporting:
 - **PDF:** This option will allow for the report to be emailed to a boss, saved on a computer or network, or be printed.
 - **HTML:** This is simply a text format.
 - **Excel spreadsheet:** This will open the report in Excel and allow you to change and modify the report according to the rules and capabilities of the program.
 - **CSV file:** This format will open as an Excel CSV and will show the tickets' column titles in columns and rows for modification.
- **Run this report on schedule:** When this box is checked, a Scheduler box will appear. This is a powerful tool that will allow you to run Reports on a specific schedule without having to manually run the report every time. You can set the following to occur for your report.
 - **Recurrence Pattern:** If you would like to create a Recurrence Pattern for your Report that will automatically launch the Report, select the radio button for the option to run the Report
 - o **Daily:** Set your Report to Recur Every (X) Day(s)
 - o **Weekly:** Set your Report to Recur Every (X) Week(s) on any certain day of the week
 - o **Monthly:** Set your Report to run on a certain day of every (X) month(s) OR the First, Second, Third, Fourth, or Fifth (Day of the Week) of every (X) month(s)
 - o **Yearly:** Set your Report to run on any certain day of a certain month OR the First, Second, Third, Fourth, or Fifth (Day of the Week) of a certain month every year
 - **Range of Recurrence:** In the **Start** text box, state when you would like your report recurrence pattern to begin. Then select whether you want it to **End After** a certain number of occurrences, **End By** a certain date, or **End Never**.
 - **Email Message to be sent:** If you would like to send the report to certain people in your organization, add their email addresses in the **To** text field. Add a **Subject** and/or **Body** for your email. The report will be added to the email as an attachment.
 - **Example:** You can set a report to run from the **Open IT Tickets** Ticket Filter every Monday morning and be sent to the IT Department Manager for analysis. To do this, you would
 - o Select the Open IT Tickets filter from the **Ticket Filter** drop-down menu
 - o Check the Configure Scheduler for this report checkbox
 - o Select the **Weekly** radio button under Recurrence Pattern
 - o Set it to **Recur Every 1 Week** and select the **Monday** checkbox
 - o Set the **Range of Recurrence** to **Start** the same day you set up the Scheduler and select the **End Never** radio button





- o In the **Email Message to be sent** section, enter the IT Department Manager's email address (**To**) along with a **Subject** and/or message (**Body**)
- o The Report will be sent in an email every Monday morning as an attachment to the email you provided.

Note: Scheduled Reports will be sent at 2:30 a.m. on the date scheduled.

When you have finished filling out all the desired information, click the **Save Changes** button. This will save your Report in the Reports page under your My Reports section where you have View, Edit, or Delete the report.



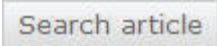
Knowledgebase

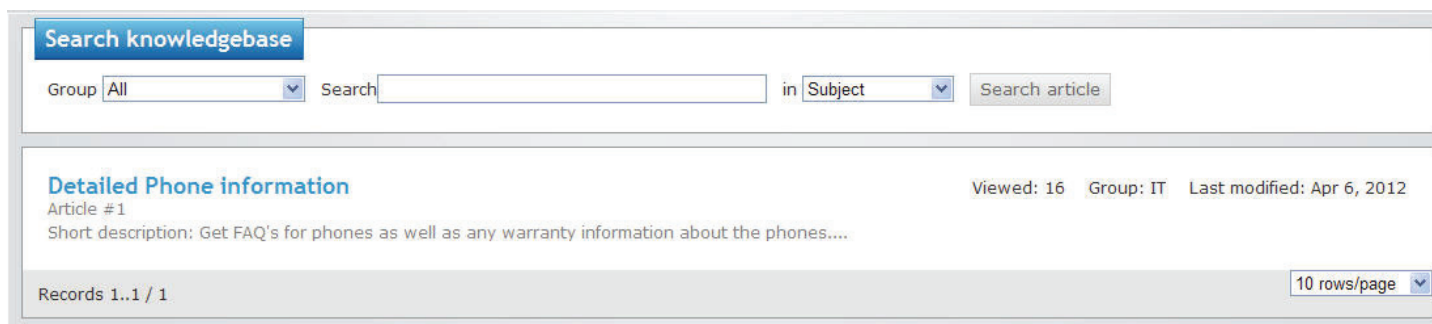
Knowledgebase (KB) articles are available on multiple subjects and offer additional information on subjects that pertain to your organization. These articles are created by Administrators, Managers, and Technicians as they see the need for the information.

Search for Articles

You can search for articles from the main page of the Knowledgebase screen. To locate this screen, click on the Knowledgebase tab in the menu. In this screen you will automatically see the top 10 viewed public articles. To view more articles, you may either navigate to the next set by changing the number of articles viewed per page in the bottom right corner. Once you have changed the number of articles viewed, the system will remember the number you have chosen next time you log in.

You can search for articles on specific subjects by using the search tools at the top of the KB screen.

- Select which group pertains to the articles you would like to find from the **Group** drop-down menu. If you would like to search all group articles, leave the group setting as **All**.
- Use the **Search** text box as a Google-type search, entering key words in the article you are searching for.
- Using the **in** drop-down menu, select whether you want the key words found in the Subject, Body, or both Subject & Body.
- Click the Search article button  to find the desired article(s).
- Once you have found the desired article, simply click on the article to bring it to full view. In full view, you have the option to **Email** the Whole Page or the Article Link to any email address for easy future access.



The screenshot shows the Knowledgebase search interface. At the top, there is a blue button labeled "Search knowledgebase". Below it, there is a search form with a "Group" dropdown menu set to "All", a "Search" text box, an "in" dropdown menu set to "Subject", and a "Search article" button. Below the search form, there is a section titled "Detailed Phone information" with "Article #1" and a "Short description: Get FAQ's for phones as well as any warranty information about the phones....". To the right of the article title, it says "Viewed: 16 Group: IT Last modified: Apr 6, 2012". At the bottom, there is a "Records 1..1 / 1" and a "10 rows/page" dropdown menu.

Dashboards

Dashboards are designed to harness the power of your saved Reports from the **Reports** page and display them visually using eight different types of Widgets (visual dials or charts used in your Dashboard). A Dashboard is created by the Administrator from saved Reports. The Reports will contain information for the Tickets you want to have visually represented in a Dashboard.

- Examples of Ticket Filters are: All Open Tickets, Tickets by Location, or All Today's Modified Tickets Grouped by Category and Regrouped by Priority. For help creating Ticket Filters please see the **Working with Ticket Filters in Ticket Search or Reports** section of the help files.

Once the Filter is created, the Administrator can create a Dashboard to be listed in the Dashboards screen.

Uploading Dashboards


To start, click on the Dashboards tab in the menu. This will take you to the Dashboards screen (**Figure 20**) where all available Dashboards are listed with a launch icon  at the far right side under Action.

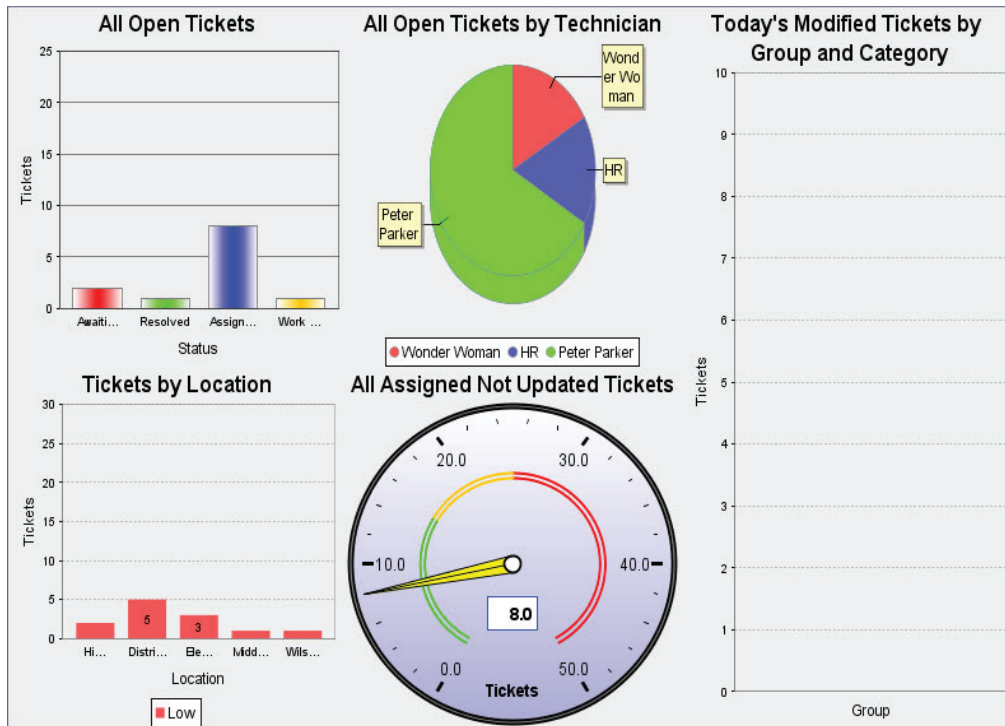
Figure 20



Dashboards	
Dashboard Name	Action
Shea Miller	
Newest	

To view a Dashboard, click the icon at the end of the row. The selected Dashboard will open in a new window using Java (example **Figure 21**). It is important to note that the Ticket information that is displayed with the Widgets, is information pertaining only to Tickets you are the contact for or you have submitted.


Figure 21



Ticket Templates

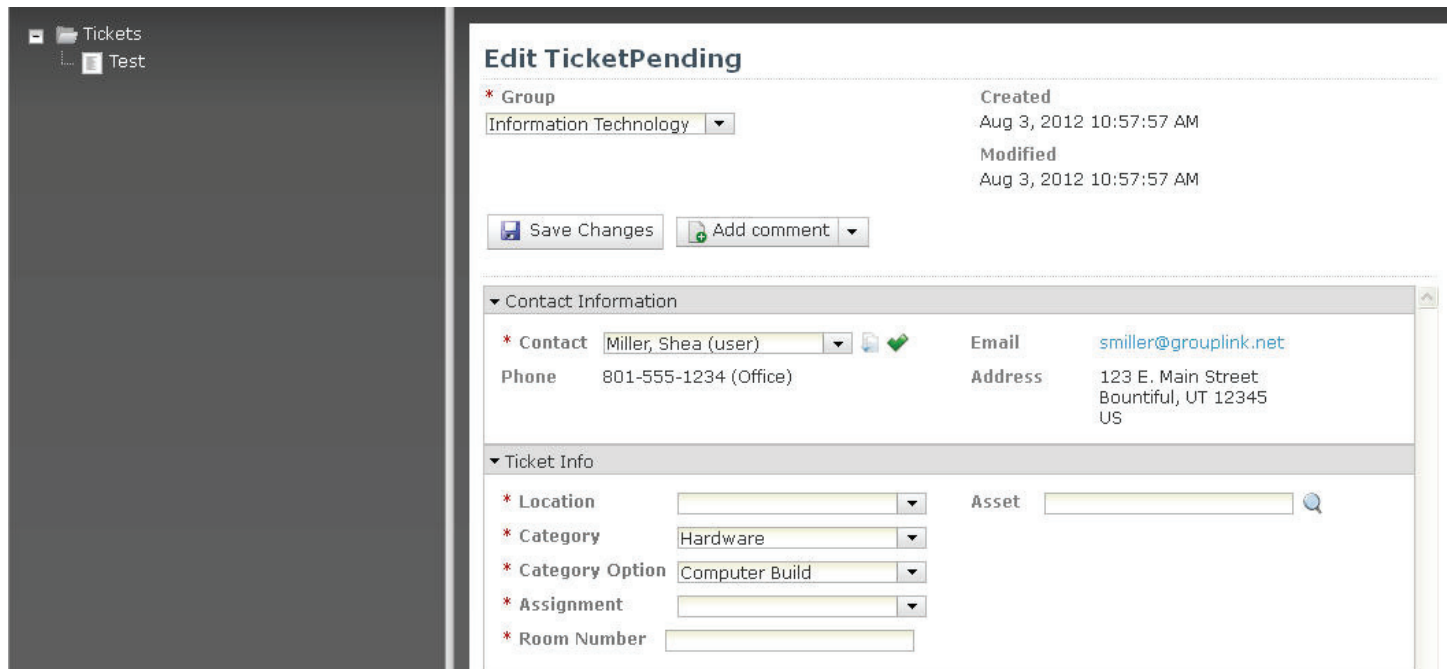
Ticket Templates were designed to help implement your business processes, routine tasks, and requests directly in the application. A template can be created once and manually launched at any time.

The first way to manually launch a Ticket Template is to click the Templates tab at the top of the screen or the Ticket Templates option on the My Tickets screen. Either action will take you to the Ticket Templates screen.

Once in the Ticket Templates screen, any groups that have Ticket Templates will be listed in tabs. Click the desired group and find which template you would like to use. To the right of each Ticket Template, under **Action**, there is a **Launch** icon . Clicking this icon will redirect you to the **Pre-launch Page**.

Another way to manually launch a Ticket Template is from the My Tickets screen. Click the arrow next to the My Tickets button and hover over Ticket Templates. This will show a list of all groups that currently have Ticket Templates. Click which group you would like to launch a ticket template from, then select the template. You will then be taken to the **Pre-launch Page (Figure 22)**.

Figure 22





Edit TicketPending

* Group: Information Technology

Created: Aug 3, 2012 10:57:57 AM

Modified: Aug 3, 2012 10:57:57 AM

Contact Information

* Contact: Miller, Shea (user)   Email: smiller@grouplink.net

Phone: 801-555-1234 (Office) Address: 123 E. Main Street
Bountiful, UT 12345 US

Ticket Info

* Location:

* Category: Hardware

* Category Option: Computer Build

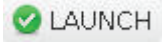
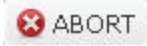
* Assignment:

* Room Number:

Asset:

Ticket Template Launch

Once the Ticket Template has been opened in the Ticket Template Pre-Launch Page the head Ticket in the Template will be opened on the right-hand side of the screen, with the Tree-Diagram on the left-hand side of the screen. If the Contact Information was blank, it will auto-populate with your information.

- Navigate through the Tickets in the Ticket Template and make any changes that are desired to the Template including adding comments, new contacts, or tying assets. Be sure to save all the changes to each Ticket before you navigate to another Ticket in the Template.
- When you are done making changes to the Ticket Template click the **Launch Button**  in the top right-hand corner of the screen. Clicking on the **Launch Button** will launch the Ticket Template and give you a visible confirmation (**Tickets Launched Successfully**). For the launch to be successful, all of the fields that are required to submit a Ticket must be filled out in every Ticket of the Template.
- If you decide not to launch the Ticket Template simply click on the **Abort Button** . The **Abort Button** will pull up a **Confirmation** box asking you if you really want to abort the launch. If you want to abort the launch click **OK**. You will then be taken back to the Ticket Template Management Page. If you don't want to abort the launch, click the **Cancel** button.

It is important to note that all Tickets in the **Ticket Template Launch Page** will become rogue Tickets if they are not launched or aborted from the Ticket Template Launch Page. These rogue Tickets will only take up space in your Database. They will not show up in the system or affect any reporting.

Surveys

The Survey Process

Surveys are designed to gauge and track the efficiency of your team's ability to resolve the issues being tracked through the eHD application and your customer's satisfaction in this process. Whenever a ticket is closed (under a Group, Category, or Category Option that has an activated or enabled survey) an email will be sent out to the contact on the ticket. The email says:

"Thank you for using the HelpDesk system. In order to improve performance and user satisfaction we would like you to complete a short survey at:

User Survey

"Thank you for your time."

User Survey is a link to the Survey. Clicking the User Survey link will open the browser (or a new tab in the browser). The survey will contain the following three questions:

- Was your ticket answered? No Yes
- Was your ticket answered in a timely manner? No Yes
- Please rate your experience on a scale of 1 to 5, 1 being unsatisfactory, and 5 being excellent:
1 2 3 4 5

Enter your responses and click **Submit**. The page will then display a thank you message. If you answered No to the question, **was your ticket answered?** an email will be sent to the Manager of the Group and to the Technician the ticket is assigned to inform them of the matter. This will give the manager and the technician the opportunity to quickly correct the issue.