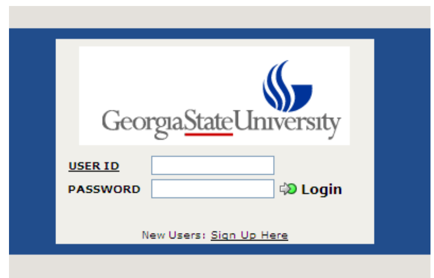
Creating an Incident

Numara FootPrints is a web based work ticket software package replacing HEAT. It is not restricted to any specific browser, or OS. However, you must have pop-ups enabled.

Logging-In

1. To access the system, go to https://helpdesk.gsu.edu
2. Use your campus ID and LDAP password to access the system (this is the same password used to access EasyView)
3. Click on Login

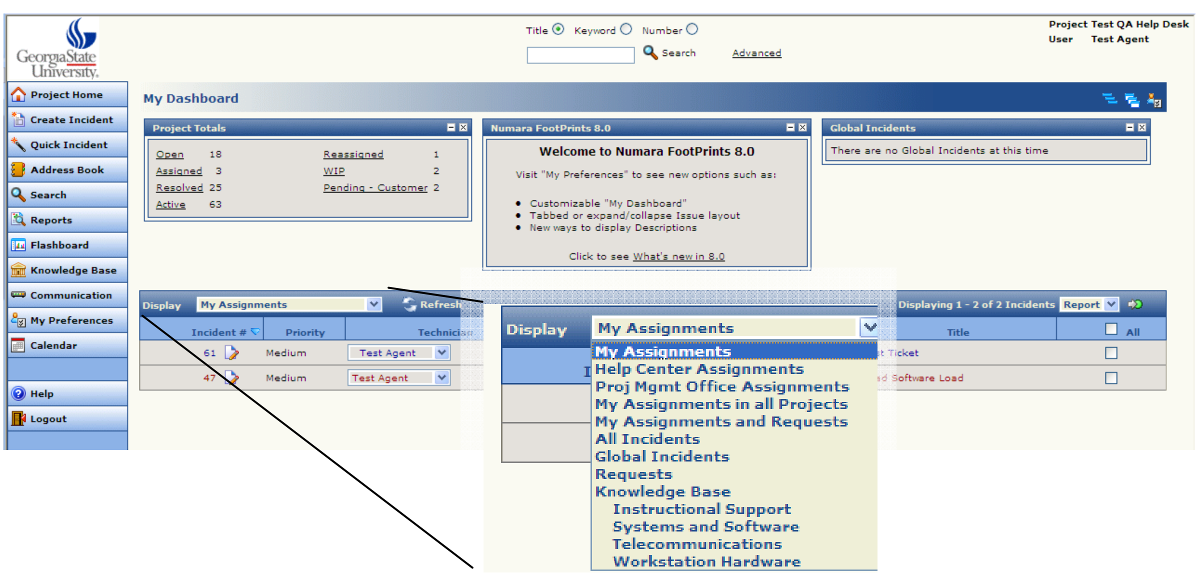
- *Note:* Your browser must allow for pop-ups to be used from https://helpdesk.gsu.edu for the system to work properly.



My Dashboard

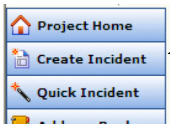
After logging into the system, you will be taken to the “project” home page. In the main screen you will see **My Dashboard**. This section gives you information about incidents in the system as well as other information that you may find useful. The top section is fully customizable so that you can include useful information such as RSS feeds, HTML text, charts, and graphs that you might find useful.

The second section down lists all of the incidents that are assigned to you. The drop down box located to the top left of this section allows you to view your assignments, as well as the assignments for each of your assignment groups.



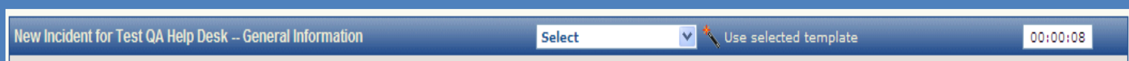
Creating an Incident

Creating a ticket (incident) is very similar to Remedy and HEAT in concept.



1. From the menu box on the left hand side of the screen, click on **Create Incident**.
2. A new window will appear, this will be the incident create form.

Note: When you open an incident, a clock starts in the top right of the ticket.



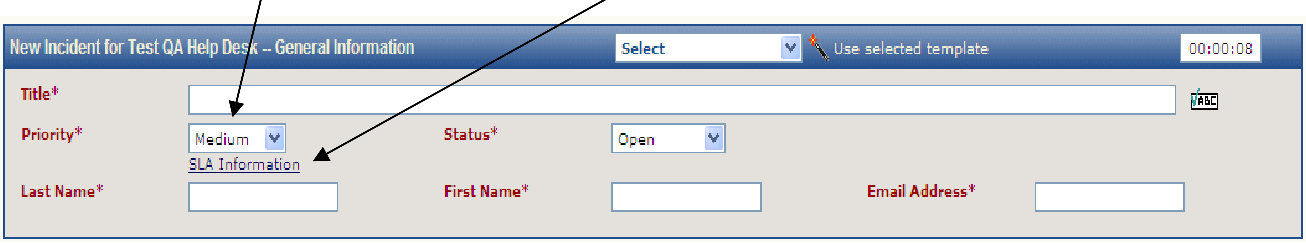
This automatically counts off the time you spend in a ticket. You can, at the bottom of the ticket, add additional time spent working on the issue.

New Incident Section

1. Give the new incident a summary title. This will be used to help identify the ticket in a list without having to open the ticket.
2. The default priority given all tickets is Medium. You can change the priority of the incident by using the drop down. Valid choices are:

   Critical
   High
   Medium
   Routine
   Extended

   - *Note:* Routine and Extended are to be used for service requests. In order to see the SLA associated with a priority, click on the priority in the drop down box and then click on the SLA Information link located under the dropdown.



3. All tickets will be opened in an Open Status. When a ticket is assigned to a group, or technician, the status should be changed to assigned.
4. Ignore **Last Name, First Name,** and **Email Address** as this will be filled in using the section below.

Contact Information

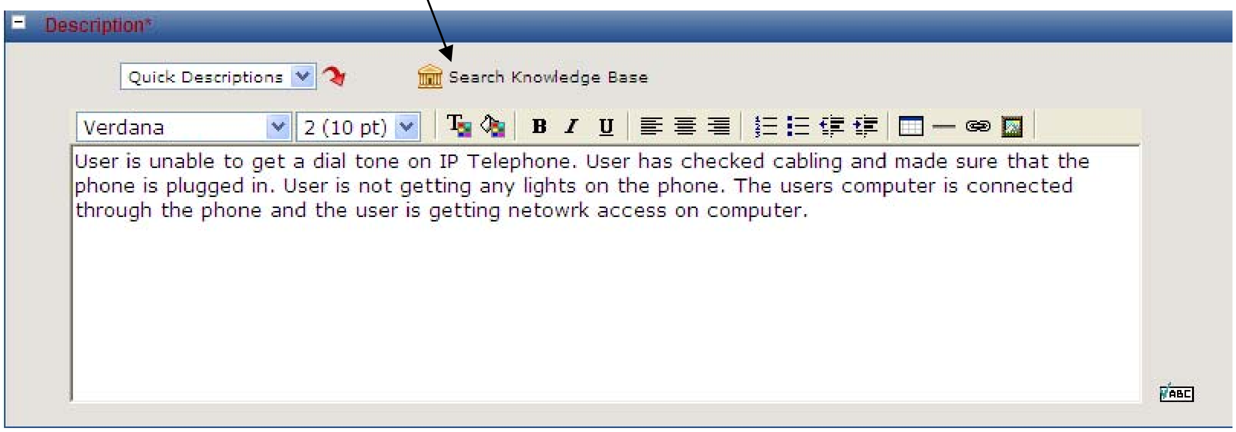
1. First type the customers CampusID into the CampusID Field
2. Hit *Enter* on the keyboard

- *Note:* The system will search the campus LDAP directory and return the customers Last Name, First Name, Email Address, and phone number. If a person does not know their CampusID, then the agent can enter in any of the information that they do know (i.e. Last Name) and hit Enter. The system will return a list of possible options from the LDAP directory.
- *Note:* If the caller is not in LDAP, then the technician will have to enter in Last Name, First Name, Email Address and a CampusID. (*Note:* Any label in Red is a required field and must be completed in order to save the ticket.)

3. If the customer is calling in reference to a previous ticket that they have submitted, or you would like to see the incident history for the customer, you can enter the CampusID of the customer, hit enter, and click on the History icon located above **Last Name**.

Description

1. The description box is where the *customers comment* on the issue is entered.
2. If you wish to search the knowledge base on a solution, you can click on the Search Knowledge Base Icon.



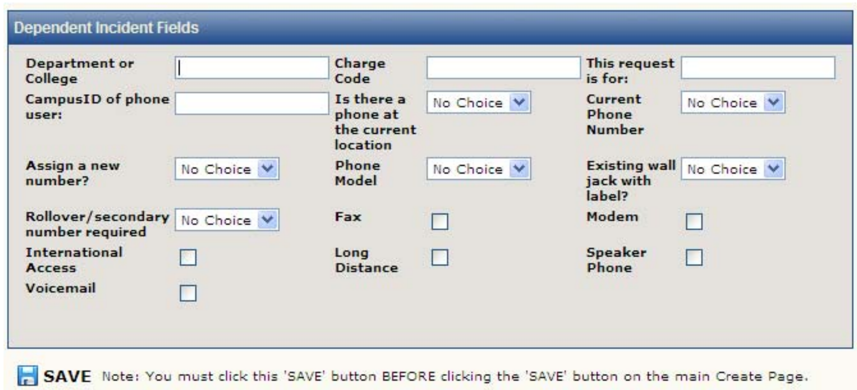
- *Note:* the description field is information that **will be** passed to the customer. In the future, and information that you would like to send to the customer should be entered into the description box.
- *Note:* You can format the text captured in the description box including hyperlinks and pictures. File attachments will be added below.

Issue (incident) Information

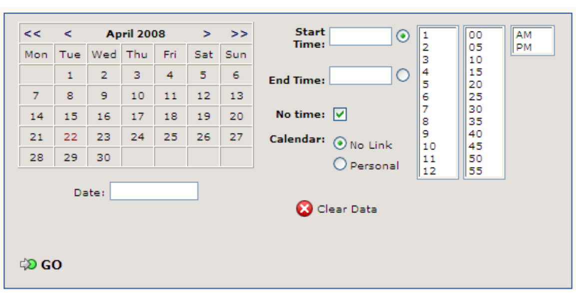
1. The next box down is the issue information. This is information for the technicians working on completing this issue.
2. The first four fields are for categorization of the ticket by the Request Type, Category, Type, and Item. The boxes will populate based on the selection made in the previous field. Assignment suggestions will be made based on the CTI.

- *Note:* If you are using a CTI related to a classroom support call, you will see two additional fields populate asking for the building and classroom number. This list is populated with the classroom that IS&T currently supports.

3. Some CTIS have associated pop-up screens asking for additional information related to the request being made. If a new window pops up, you will be asked to complete the additional information and click on **SAVE** before continuing with the rest of the issue.



4. The **Submitted Via** field lets the technician know how the ticket was received. Valid choices are phone, self, and system event.
5. The **Urgency** field is used to capture the urgency of the customer to resolve the issue. This should reflect the customer's perception. Valid choices are Critical, High, Medium, and Routine.
6. **Impact** is used to reflect the effect that the incident is having on the customers ability to perform their job function. Valid choices are Critical, High, Medium, and Routine.
7. The **Appointment Time** field is to be used when the technician sets an appointment with the customer to perform some task that the customer when the customer needs to be present.



a. Simply select the date in the calendar by clicking the number. The day highlighted in red is today's date.

b. You can select the start time by making sure that the radio button next to **Start Time** is selected then checking the appropriate hour and minute. Be sure to check the appropriate AM or PM.

c. You can put in an **End Time,** but it is not necessary.

d. Make sure that the radio button next to **No Link** under **Calendar** is selected.

e. Click on **GO**

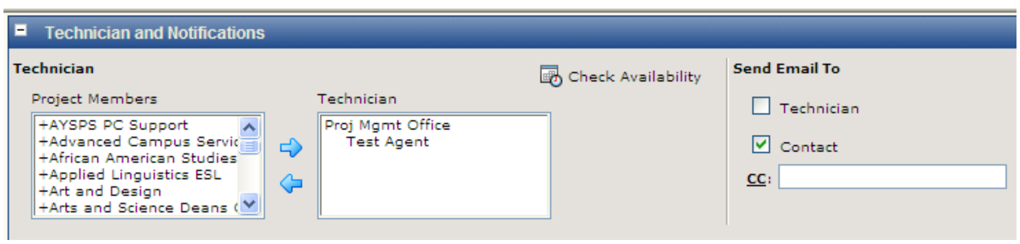
   - *Note*: You can use the **Clear Data** button to clear the appointment time if you need to reset the appointment or delete an appointment from a solution.

- *Note:* When an appointment time is present and the incident is saved, an e-mail will be sent to the customer and the technician reminding them of the appointment.

8. **Technician Notes** is where a technician can put information that can only be seen internally by other technicians. Notes entered in this field will not be sent to the customer.
9. **SLA Due Date** and **SLA Response Time** are automatically generated fields based on the priority of the ticket. These fields will be calculated once the issue is saved.
   - *Note:* If an issue is placed in a pending status, then the **SLA Due Date** and **SLA Due Time** will also show to be a pending status until the ticket is again moved to a WIP status.

Technician and Notifications

1. Think of this as the assignment field. Here is where you assign (or change assignment).
2. You can assign a ticket to multiples. In the example below, the issue has been assigned to both the team and an individual technician in that team. You will want to be careful with this feature.

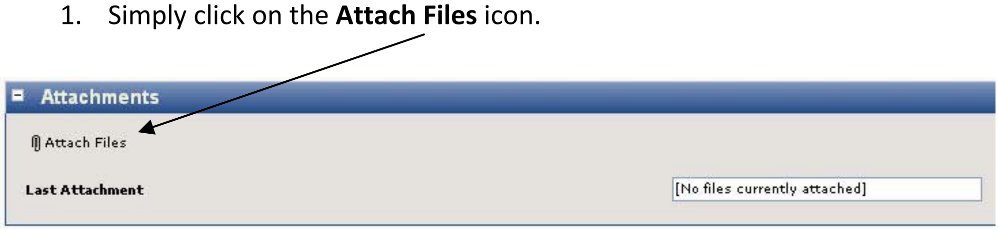


3. The **Send Email To** area is used to send an e-mail to the customer. An e-mail will be sent when the ticket is created and when it is initially assigned to a group. If a technician needs to send an e-mail to the customer, and would like for the e-mail to be captured in the ticket, then the technician can type in the comments that they wish to send to the customer in the **Description** area and make sure that the contact box is checked. Also, if the technician would like to send information about the ticket to someone other than the contact or technician, they can enter in the **full** e-mail address of the person in the **CC:** box.

Attachments

A new feature in FootPrints is the ability to attach files to an issue.

1. Simply click on the **Attach Files** icon.



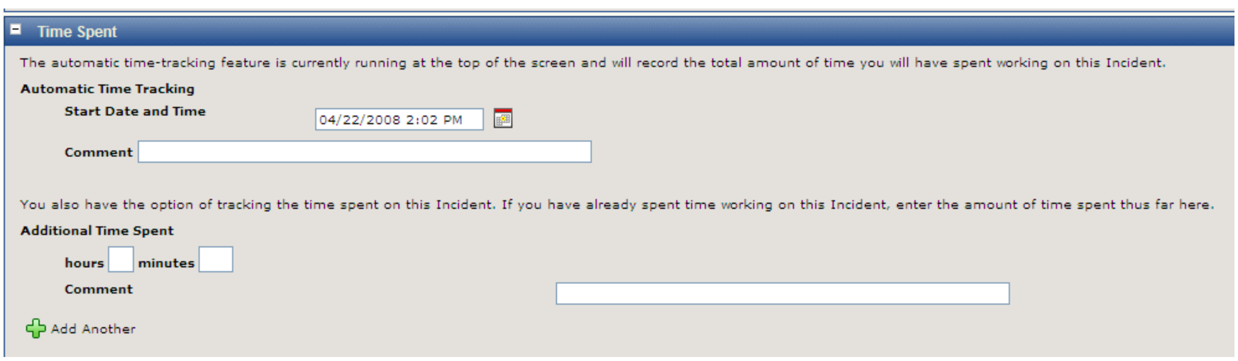
2. A new dialog box will appear giving you the option of attaching up to three files to the issue at a time.

- *Note:* Each attachment is limited to 500 KB.
- *Note:* Periodically the system administrator will delete attachments that are linked to issues that have been closed. The issues will remain in the system; however the attachments will show as being removed and not longer available in the system.

Time Spent

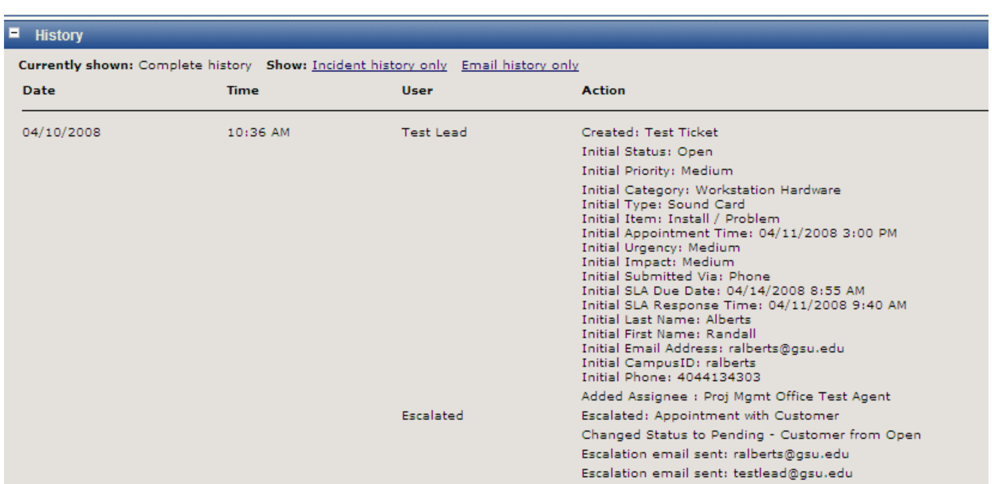
As mentioned above, in this section you can enter additional time spent working on this issue.

1. Under **Additional Time Spent** you can enter in any additional time sent working on this ticket. (This is useful for technicians that may print off a ticket and carry it with them to work the issue in the field. They can then return and put in additional time so that they are accurately accounting for time related to the issue.)
2. Technicians also have the ability to enter any comments related to the time spent on an issue.



History

The final section of every case is the history. This is a non-editable audit trail of auctioned taken on this ticket including e-mails and escalations that have been sent as it relates to this issue.



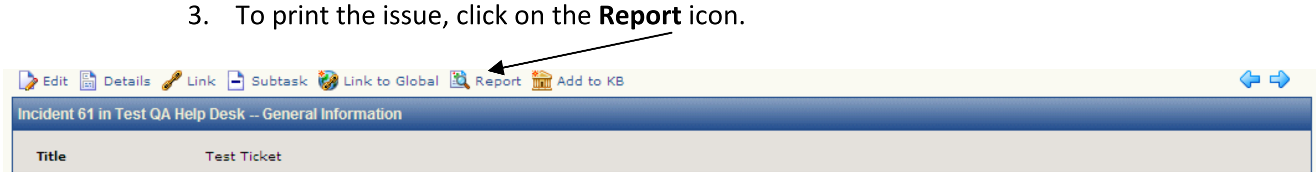
Save

<u>Finally, and perhaps most importantly, every time you make a change in a ticket you must save before leaving that ticket!</u>

- *Note:* The **Save** icon can be found located at the top and the bottom of the issue form.

Printing an Issue

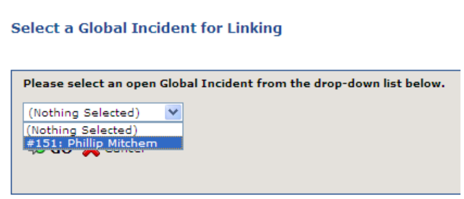
1. In order to print a ticket, you will need to be in read only mode for the ticket.
   a. If you are on **My Dashboard**, click anywhere on the ticket row except for the paper and pencil icon.
   b. If you are in ticket edit mode, click on **Details** located at the top of the issue. (*Note:* Simply clicking on **Details** the system will alert you that your current changes will be abandoned. First save the issue, then go back to the ticket in a read only mode.)
2. In read only mode you will see several new icons at the top of the issue. (*Note:* Some icons are role specific.)
3. To print the issue, click on the **Report** icon.



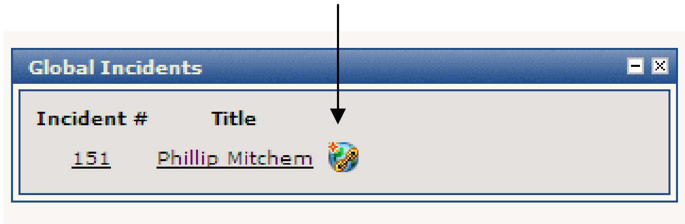
4. The issue will open in a new window so that you can print. This report will include any additional fields that are complete in pop-up screens.

Linking an issue to Global

1. One of the icons at the top of the ticket will be **Link to Global**. Click this icon.
2. You will be given a pop-up window with a drop down box. In the drop down box select the global issue that you wish to link the current incident.
3. Once the Global issue is selected, then select **GO**. The incident is now linked to the Global Incident.



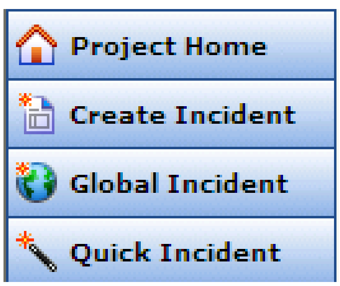
4. You can also create a new linked issue to a global issue be clicking on the global icon next to the issue on the dashboard.



5. When you click on the icon, a new issue will open with the same title and comments as the global issue. You will need to fill in the customer information and click **Save**.

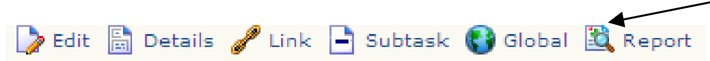
Creating a Global Issue (Managers Only)

Currently only managers and team leads have the option of creating **Global issues** or promoting issues to **Global** status. If you do not have this access, but feel that an issues needs to be promoted, you should assign the ticket to your manager so that they can promote the issue.



1. To create a Global incident without first creating an incident, a manager can simple click on the Global Incident located on the project home page.
2. A new window should open with a new issue. The difference is that the contact information is not included. A Global issue is not assigned to a customer, instead a Global issue is created and then individual customer issues are created from the global issue.
3. In creating a **Global Incident**, there will need to be a **Priority** assigned. *Note:* Not all **Global Incidents** will need to have a critical **Priority**.
4. You will still need to complete all of the required fields including the **CTI**, **Urgency**, and **Impact**.

5. If a Manager wants to promote an **Issue** to a **Global Issue**, first they must open the issue in a read only state.
   a. If you are on **My Dashboard**, click anywhere on the ticket row except for the paper and pencil icon.
   b. If you are in ticket edit mode, click on **Details** located at the top of the issue. (*Note:* Simply clicking on **Details** the system will alert you that your current changes will be abandoned. First save the issue, then go back to the ticket in a read only mode.)
6. At the top of the **Issue**, you will see a tool bar. One of the options will be **Global**.



7. When you click on the **Global** icon, you will see a new menu appear.
8. In order to make this issue a **Global Issue**, click on the **Make Global** link.

9. Doing so will open up a new **Global Issue** window (an **Issue** without any customer information.)
10. You can fill in any additional information to the **Global Issue** and save.