IT HELP DESK SYSTEM

IT Help Desk System (Version 1.0)

User Manual

Manar Mazyad

Supervisor: **Dr. Mohamed Fares**

Document History

Date	Version	Author	Comment
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Contents

Preface

i.1 Purpose and scope

This guide is written for people with minimal knowledge of the IT Help Desk System (a.k.a. ITHD), aiming to provide all the information users might need to use the system and inquiries they may have. As of the date of writing this document, the system is in its first release (version 1.0). The topics covered will help users and provide them with the system's conventions, access control, system requirements, system's navigation bars and menus, instructions, troubleshooting, keyboard shortcuts, frequently asked questions, and system's terms (glossary).

i.2 Audience and system users

The document aims to help all of the system users:

- **IT Help Desk System Admin:** One of the IT technicians whose responsibility is to maintain the system users and keep track of IT staff work load.
- **IT Staff (a.k.a. IT technicians):** Responsible for solving technical problems.
- **Staff:** The company's employees (other than the IT department) facing technical problems.
- **IT Manager:** The person concerned with the performance of the IT department (both IT staff and IT Help Desk admin) and the support staff receive.

All users are assumed to have basic Windows operating system knowledge and to have general Internet skills (e.g. how to reach a website and fill in a web-based form).

Conventions

Throughout this document the following conventions will be used:

Example of convention	Explanation
Boldface type	• Buttons on screen • Keys on the keyboard
Italic type	Inputs or examples of inputs
Hyperlink	Provides quick and easy access to cross-referenced topics. Hyperlinks are underlined and highlighted in blue.
File > **Print…**	Used to identify menu choice and command selection.
Red text	Caution, actions may cause permanent data loss.
	Used to highlight and order buttons in figures

Table 1: User manual conventions

Chapter 1: Access control

1.1 User credentials

To log in to the system, you will need the user name and the password, this information will be given to you upon employment finalization. You must change the given password for safety reasons. Changing the password is as detailed in section 1.3 Change Password.

1.2 Logging in

To log in to IT Help Desk System, follow the steps below:

Step 1: Open your browser to the company homepage.

Step 2: Navigate to IT Help Desk System.

Step 3: Click on **Log in** (3 in Figure 1) on the top right corner.

Figure 1: Navigation bar

Step 4: Inter your username and password and click **Log in** button (4 in Figure 2).

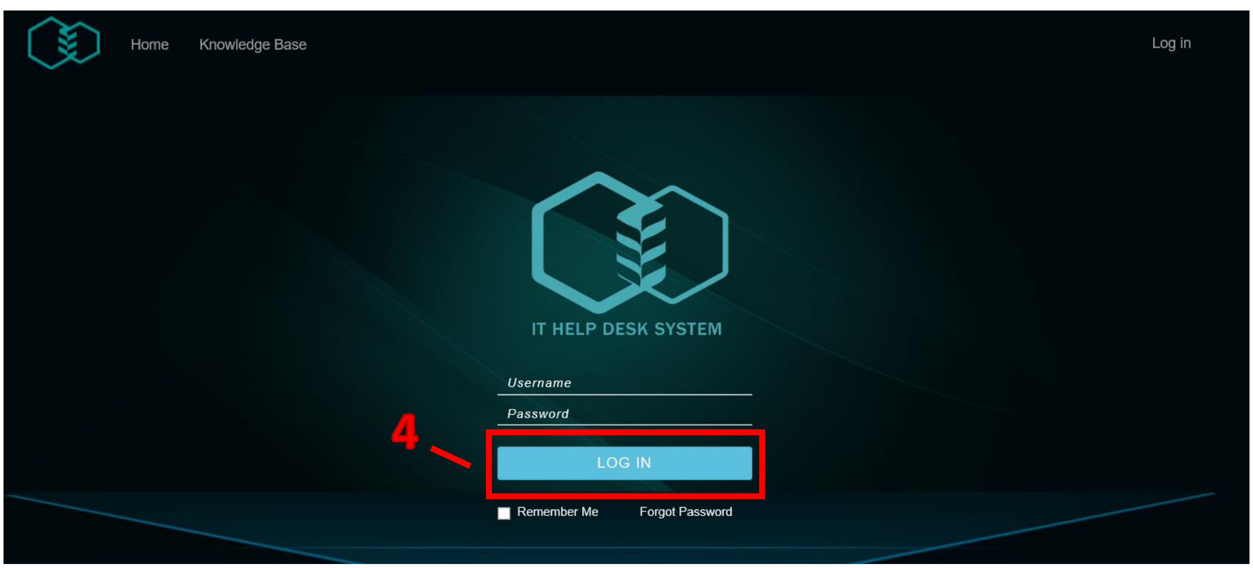

Figure 2: Log in page

1.3 Changing Password

Please note that the password must be at least six (6) characters long. To change password, log in to your account as detailed in section 1.2 Logging in, then follow the steps:

Step 1: Click on your **username** on the top right corner (1 in Figure 3).

Step 2: Click on **Change password** (2in Figure 3).

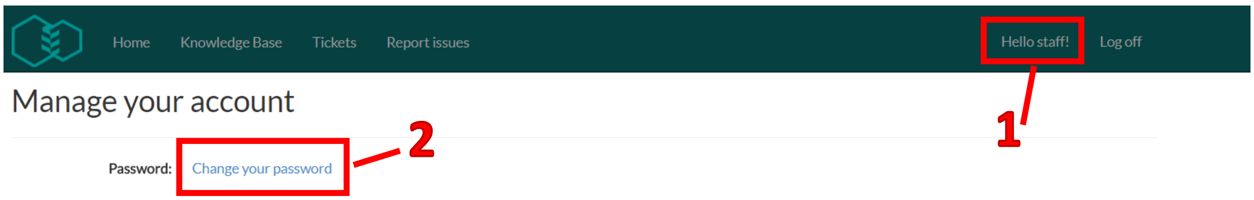

Figure 3: Change manage account page

Step 3: Fill in the form with the password you used to log in and a new password (not less than 6 characters) Click **Change password** (3 in Figure 4).

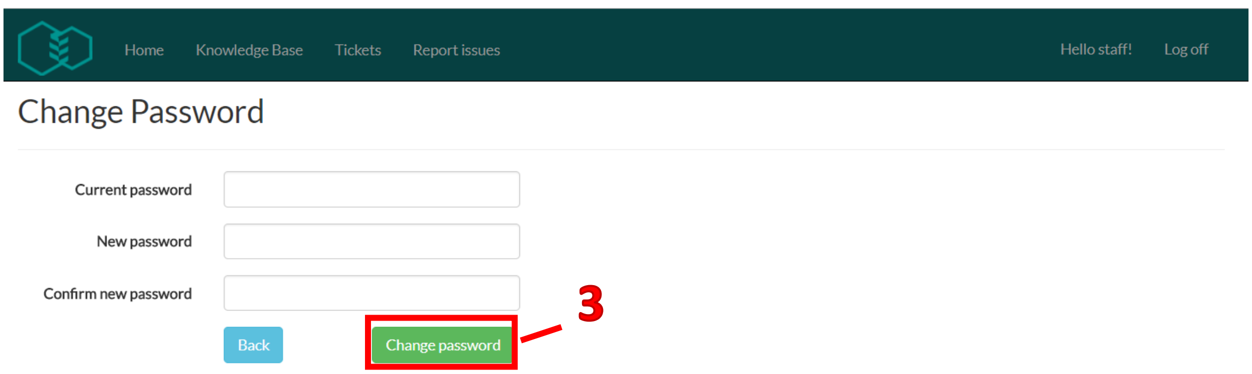

Figure 4: New password form

1.4 Logging out

Step 1: Click on **Logoff** (1 in Figure 5) on the top right corner of the navigation bar.

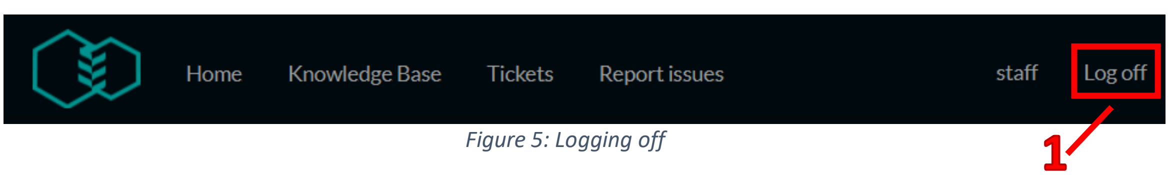

Figure 5: Logging off

Chapter 2: System requirements

IT Help Desk System recognizes the diverse operating systems, devices, and Internet browsers users might be accessing it through. Across the different platforms, the following minimum requirements must be met to run the system:

2.1 Operating systems

IT Help Desk system is tested on Windows 10, which is the recommended operating system.

2.2 Database management system

The recommended DBMS is the Microsoft SQL Server 2016 (version 13.1).

2.3 .NET Framework

IT Help Desk System is recommended to be used with the .NET Framework (version 4.0)

2.4 Browsers

The browsers that run IT Help Desk System are:

- Google Chrome - version 65.0 (recommended)
- Internet Explorer - version 11.371

2.5 Devices

IT Help Desk System utilizes technology that allows it to be displayed on multiple devices and screen sizes. However, it is best suited for desktops and laptops, smaller screens will lose some of the system interface qualities.

Chapter 3: Instructions

This chapter will give instructions on how to carry out each of the users' tasks. Therefore, it will be divided into four sections, according to the system users. Each user's section is color coded as follows:

3.1 Guest user (not logged in)

If you have not logged in, you will see the navigation bar in Figure 6 below. There are three tabs in the guest navigation bar, explained in order in the following sections.

Figure 7: Guest user navigation bar

3.1.1 Home

Clicking on this tab will take you to the Homepage, shown in Figure 7, which is shared between all users. There, you can:

1- Search the knowledge base (1 in Figure 7), by entering what you are looking for (e.g. *printer jam).*
2- Browse all knowledge base solutions page (2 in Figure 7)
3- Submit a request (3 in Figure 7).

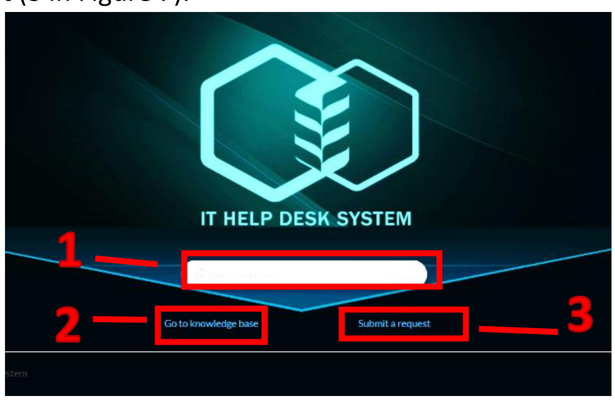

Figure 3: IT Help Desk System homepage

3.1.2 Knowledge Base

This page contains all solutions provided from IT Help Desk System. To view the details of the solution you are looking for, click on the **Details** link (1 in Figure 8)

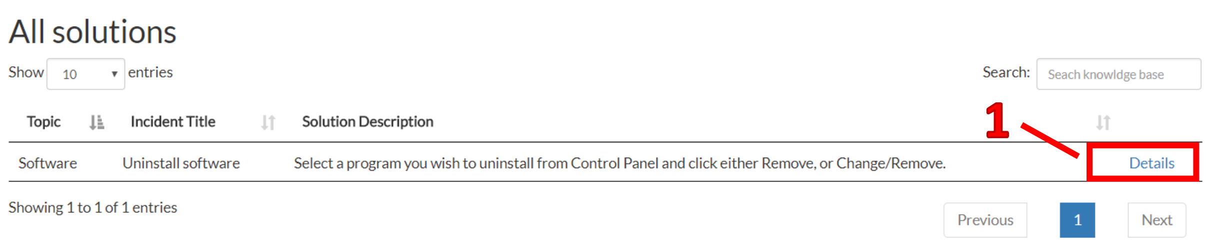

Figure 8: Knowledge base

3.1.3 Logging in (see section [1.2 Logging in](#))

3.2 IT Help Desk System admin

The admin will see Figure 9 as his navigation bar. Through the coming sections, each of the tabs will be explained in the order they come in.

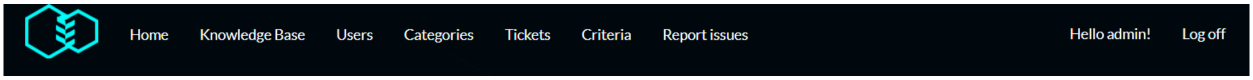

Figure 9: Admin's navigation bar

3.2.1 Home (see section [3.1.1 Home](#))

3.2.2 Knowledge base

As an admin, you can search for a solution and view its details (see guest section [3.1.2 Knowledge Base](#)). In addition, you can add, edit and delete solutions (1,2 and 3 respectively in Figure 10).

3.2.2.1 Adding solution

Adding a solution to knowledge base is needed to refer tickets to it and help solving them faster.

Step 1: Click on **Add new solution** (1 in Figure 10)

Step 2: Fill in the form (Figure 11)

Step 3: Click on **Done** (3in Figure 11)

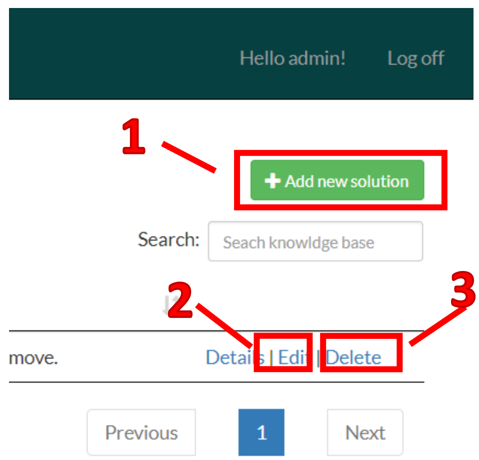

Figure 10: Add, edit and delete solution

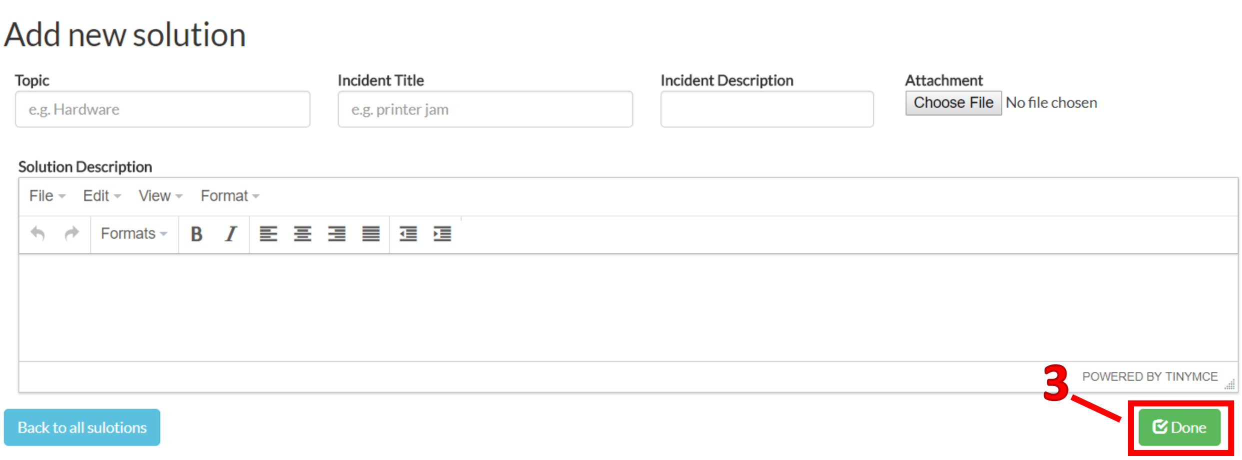

Figure 11: Add new solution

3.2.2.2 Editing solution

Editing a solution is mainly done to update a solution and add more information to it.

Step 1: Click on **Edit** (2 in Figure 10)

Step 2: Fill in the form (Figure 12)

Step 3: Click on **Done** (3 in Figure 12)

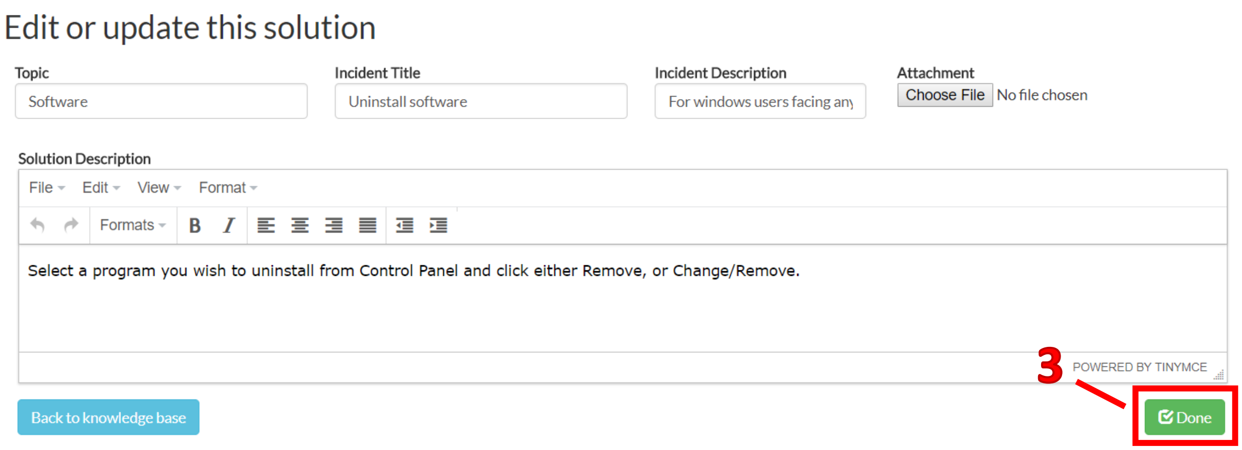

Figure 12: Edit solution

3.2.2.3 Deleting solution

Deleting a solution is mainly done to remove obsolete solutions that are no longer in use.

Step 1: Click on **Delete** (3 in Figure 10)

Step 3: Click on **Delete** (3 in Figure 13)

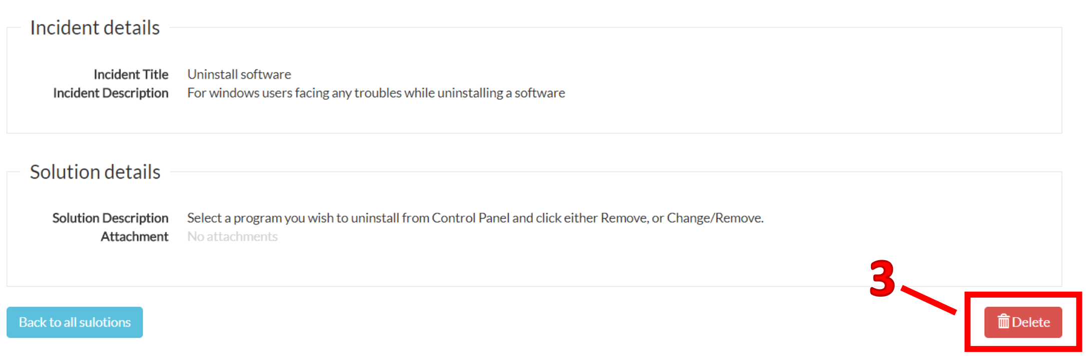

Figure 13: Delete solution

3.2.3 Managing Users

Managing users includes adding them, updating and editing their information in addition to viewing their details.

3.2.3.1 Adding users

Adding users is important as it will grant them access to the system.

Step 1: Click on **Users** (1 in Figure 14)

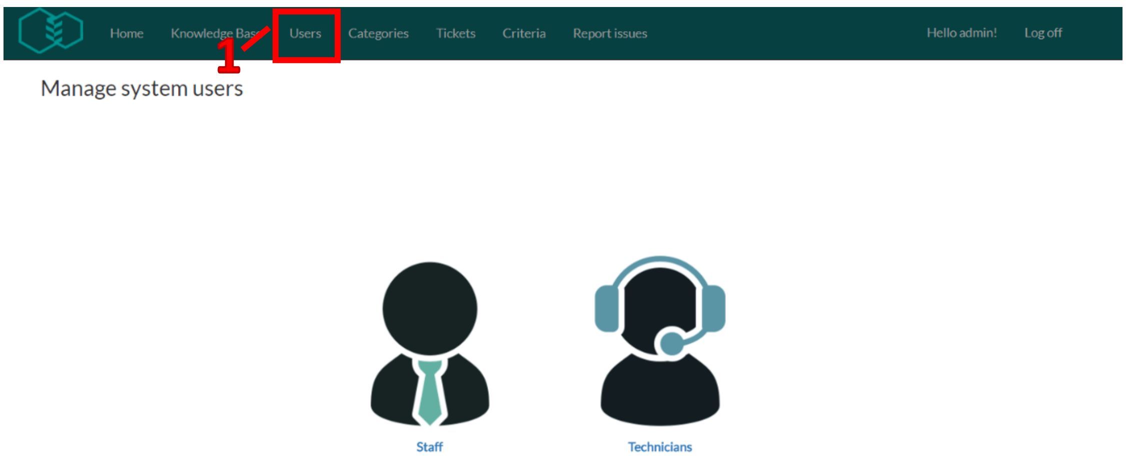

Figure 4: Users page

Step 2: Click on the user type needed (e.g. *staff*).

Step 3: Click on **Add a new staff** (3 in Figure 15)

Step 4: Fill in the form and click on **Done** (4 in Figure 16)

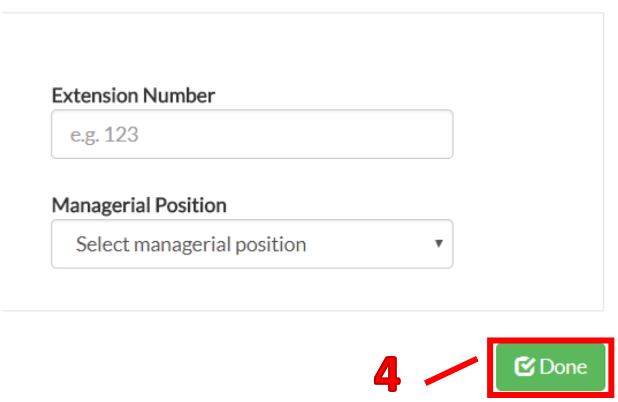

Figure 6: Add user form

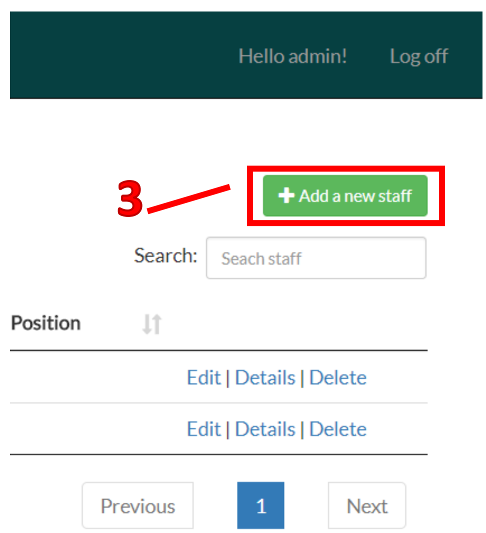

Figure 5: Add user-index page

3.2.3.2 Editing users

Users' information might need updating (e.g. new mobile number, promotions).

Step 1: repeat step 1 and step 2 from section 3.1.3.1 Adding users.

Step 3: Click on **Edit** (3 in Figure 17)

Step 4: Fill in the form and click on **Done** (4 in Figure 18)

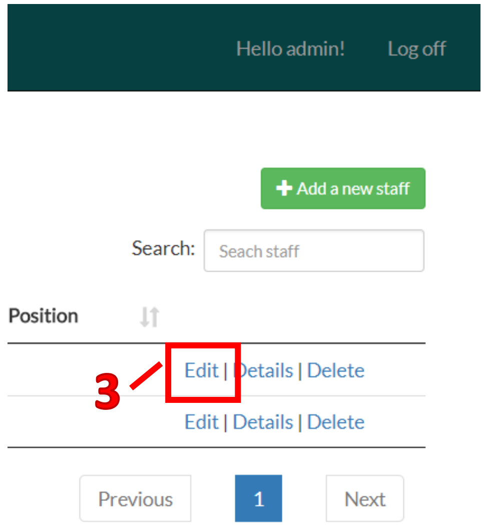

Figure 7: Edit user- index page

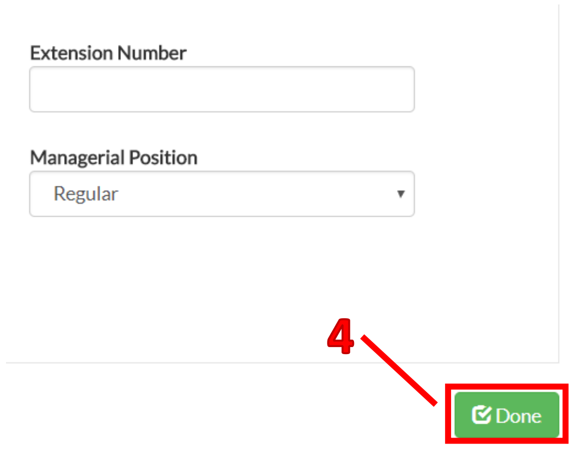

Figure 8: Edit user forms

3.2.3.3 Viewing users

It is important to be able to view users' information to check if it is in need of updates or changes.

Step 1: repeat step 1 and step 2 from section 3.1.3.1 Adding users.

Step 3: Click on **Details** (2 in Figure 19)

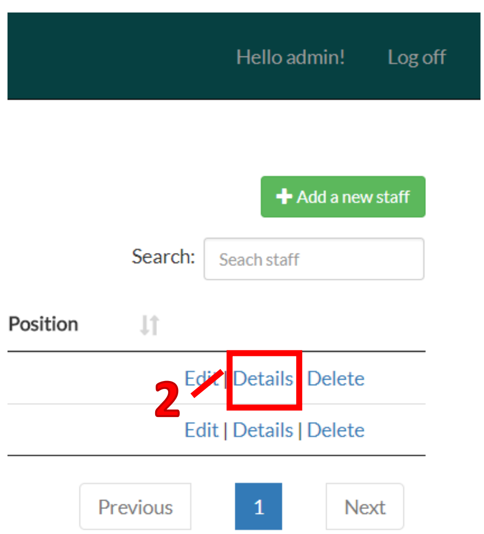

Figure 9: User's details

3.2.4 Managing categories

Categories are assigned to IT staff. Managing categories includes creating them and editing them.

3.2.4.1 Creating categories

Creating categories is the first step in enabling ticket creation and assignment.

Step 1: Click on **Categories** (1 in Figure 20) then Add new category (2 in Figure 20)

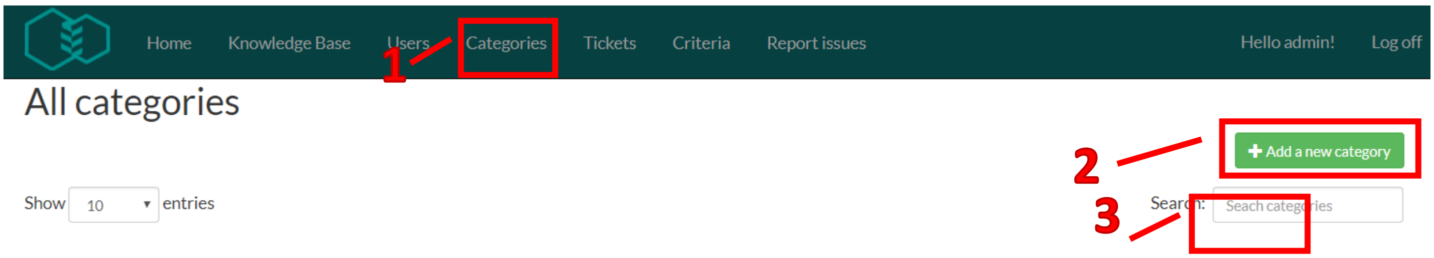

Figure 20: Add category- index page

Step 2: Fill in the form and click on **Done** (3 in Figure 21)

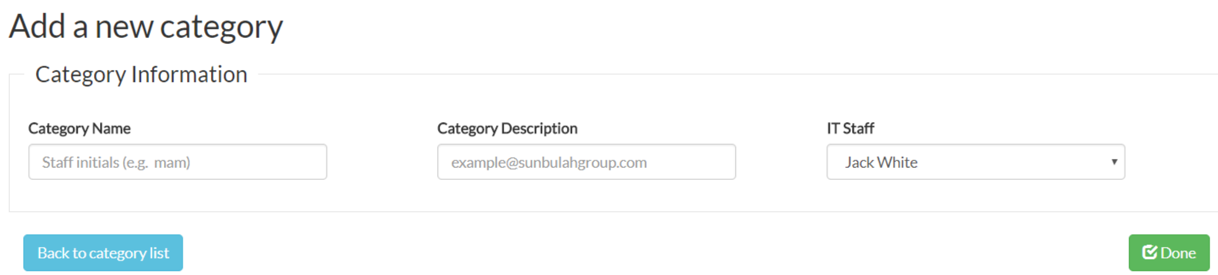

Figure 21: Add category form

3.2.4.2 Editing categories

Updating and editing categories is done regularly to insure balanced work distribution.

Step 1: Click on **Categories** (1 in Figure 20) then Edit (2 in Figure 22)

Step 1: Fill in the form and click on **Done** (3 in Figure 23)

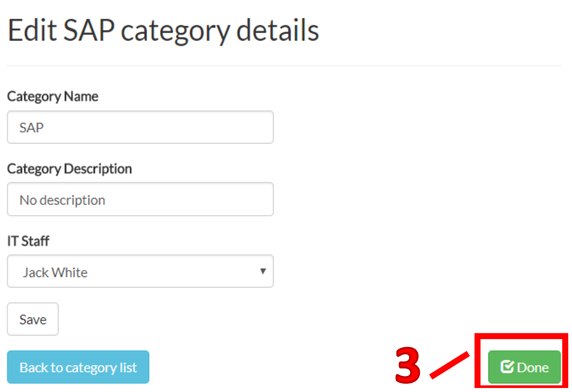

Figure 23: Edit category form

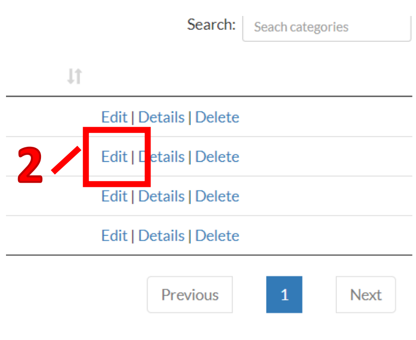

Figure 22: Edit category – index page

3.2.5 Managing tickets

Managing tickets for you as an admin means creating one on behalf of staff, assigning it, editing it and viewing its details.

3.2.5.1 Creating ticket on behalf of staff

Creating tickets on behalf of staff is done for those who cannot access the system or lack the knowledge to do so.

Step 1-A: Click on **Report issues** on the navigation bar (1 in Figure 24)

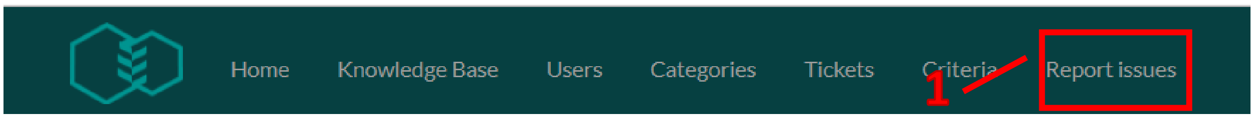

Figure 24: Create ticket on behalf - navigation bar

Step 1-B: Click **Tickets** (2 in Figure 25) on the navigation bar then click **Report an issue** (3 in Figure 26)

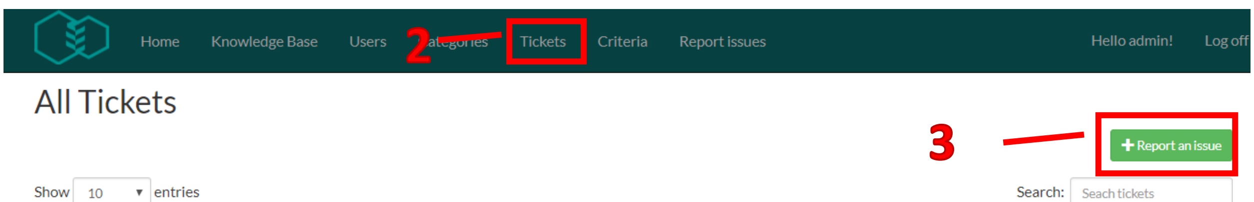

Figure 25: Create ticket on behalf - index page

Step 2: Fill in the form (e.g. subject: *printer jam*) and click **Done** (4 in Figure 26)

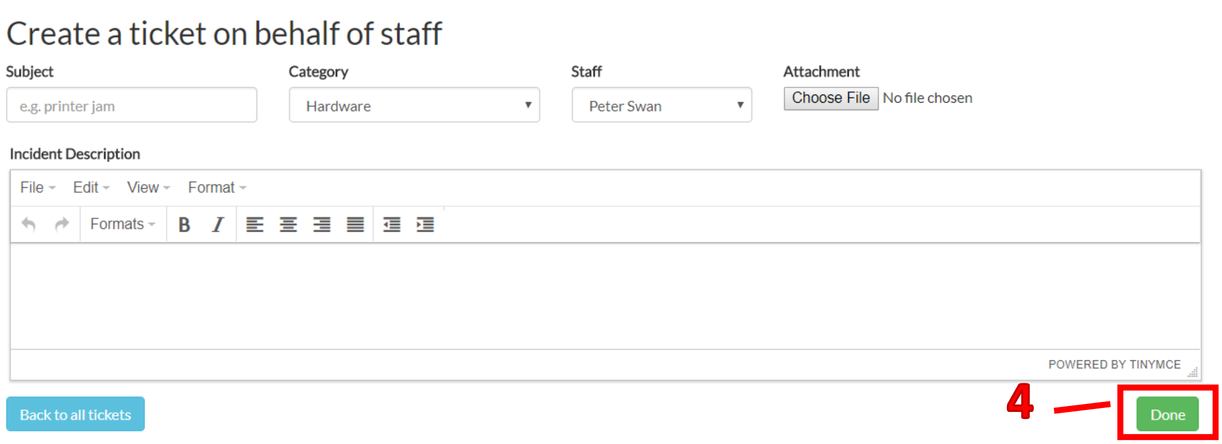

Figure 26: Create ticket on behalf form

3.2.5.2 Assigning ticket

Assigning ticket and reassigning it is needed in case it was submitted to the wrong category or in case work load was imbalanced.

Step 1: Click on **Tickets** on the navigation bar (1 in Figure 27) then **Assign** (2 in Figure 27)

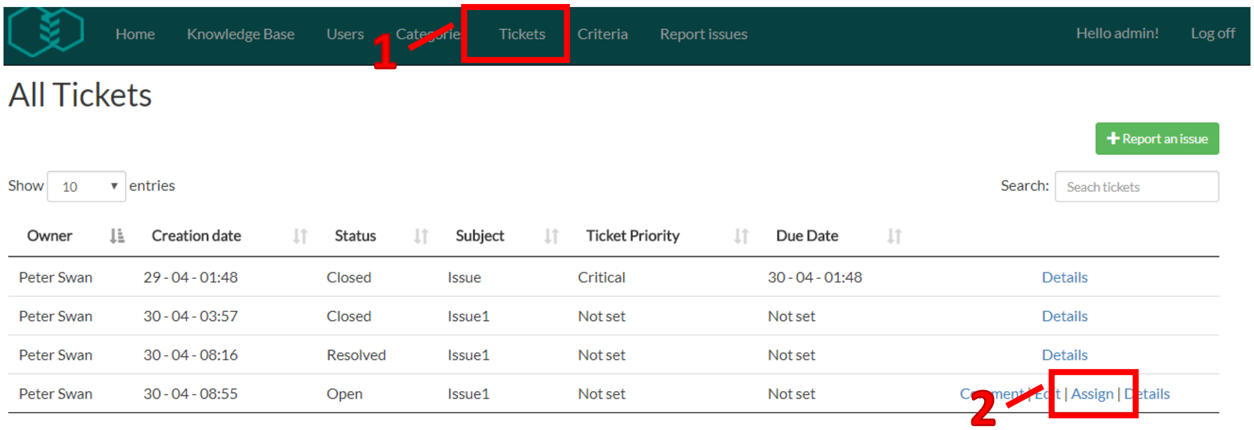

Figure 27: Assigning ticket - index page

Step 2: Choose the category to assigned to and a comment explain the reassignment.

Step 3: Click **Done** (3 in Figure 28)

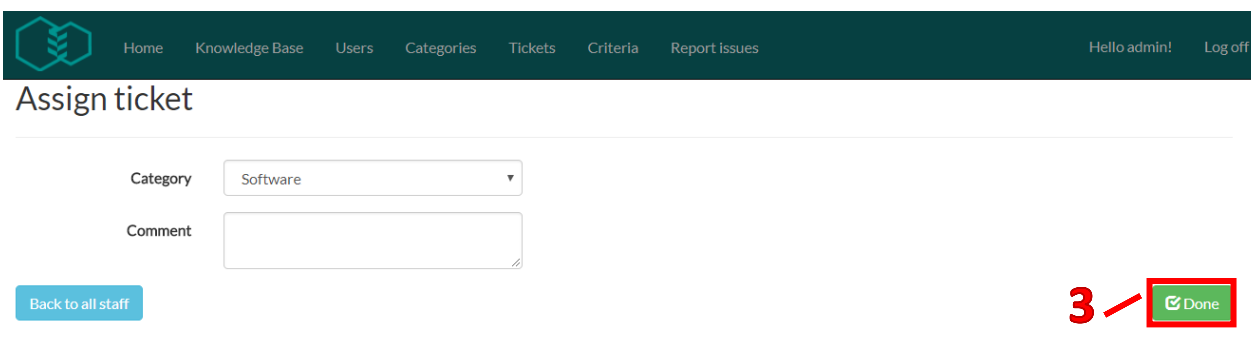

Figure 28: Assignment form

3.2.5.3 Editing ticket

After receiving a ticket, it must be edited to set its priority and provide its solution.

Step 1: Click on **Tickets** on the navigation bar (1 in Figure 29) then **Edit** (2 in Figure 29)

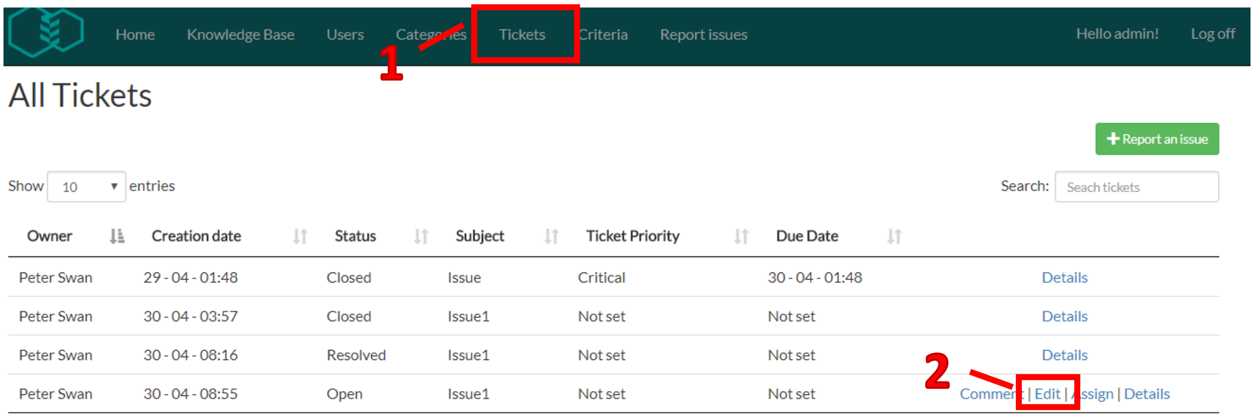

Figure 29: Editing ticket – index page

Step 2: Set the ticket priority (e.g. *critical*) and/or provide its solution (*refer to Printer Jam in knowledge base*).

Step 3: Click **Done** (3 in Figure 30)

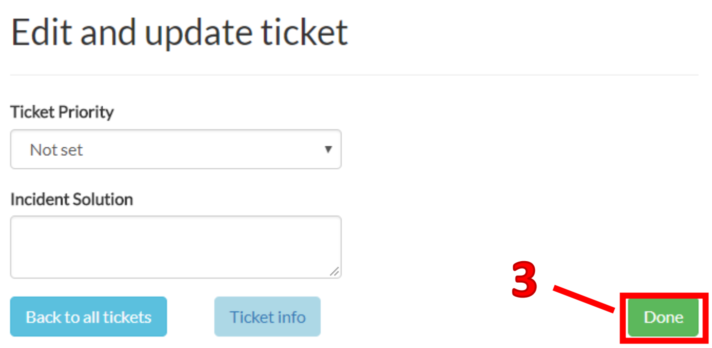

Figure 30: Editing ticket form

3.2.5.4 Viewing ticket's details

It is important to be able to see the ticket details in order to determine its priority and its solution.

Step 1: Click on **Tickets** on the navigation bar (1 in Figure 31) then **Details** (2 in Figure 31)

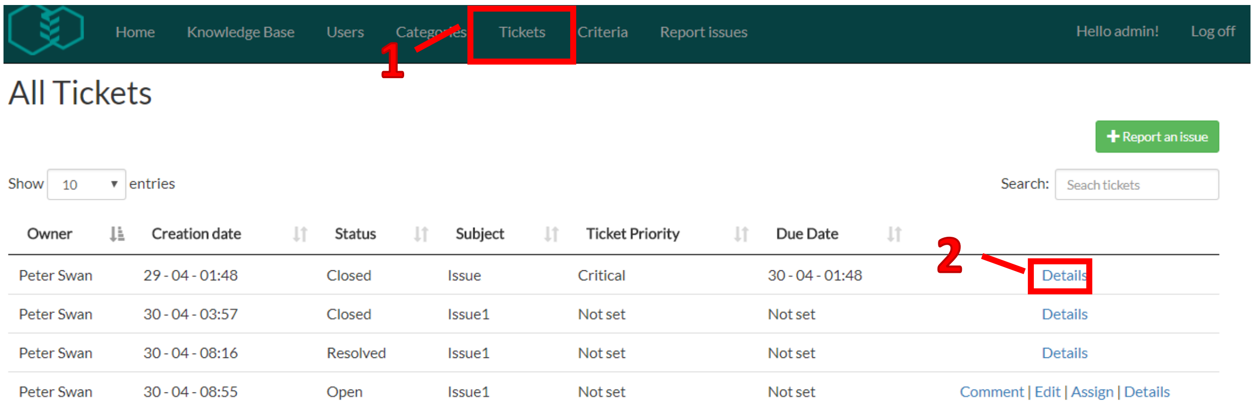

Figure 31: Ticket details – index page

3.2.5.5 Commenting ticket

Commenting is used as a way of communicating between IT staff, admin and staff.

Step 1: Click on **Tickets** on the navigation bar (1 in Figure 32) then **Comment** (2 in Figure 32)

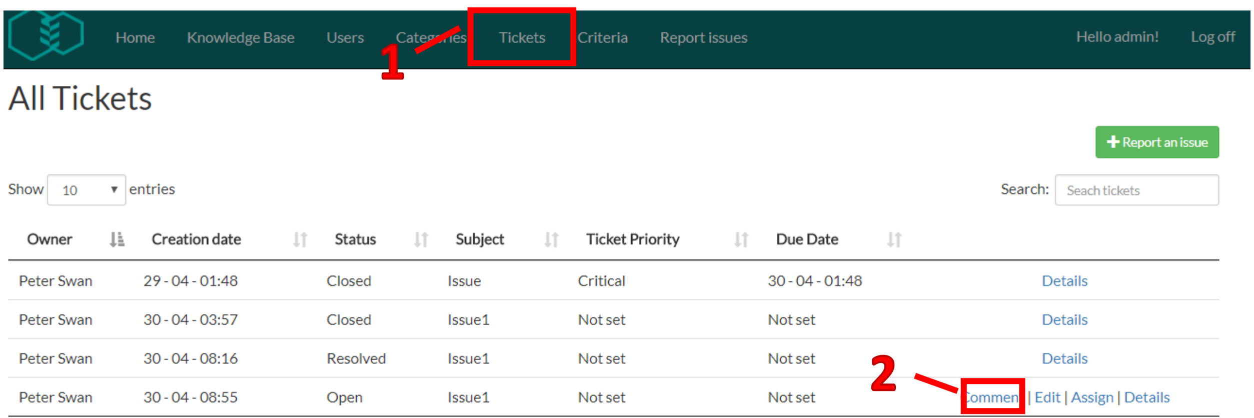

Figure 32: Comment creation – index page

Step 2: Fill in the comment you want and then click **Done** (3 in Figure 33).

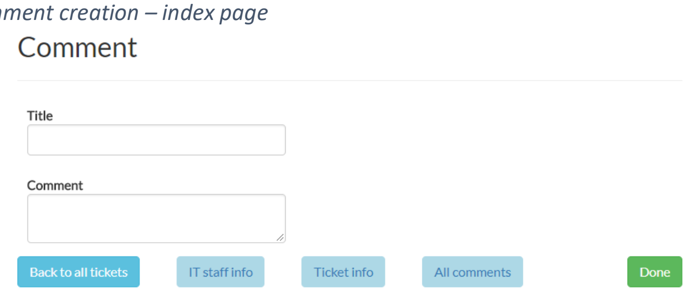

Figure 33: Comment form

3.2.6 Managing criteria

Criteria is the bases on which feedback is provided. As an admin, you can create, edit and view criteria.

3.2.6.1 Creating criterion

Criterion is created to measure and evaluate the performance of the IT staff and the services they provide.

Step 1: Click **Criteria** in the navigation bar (1 in Figure 34) then **Add a new criterion** (2 in Figure 34).

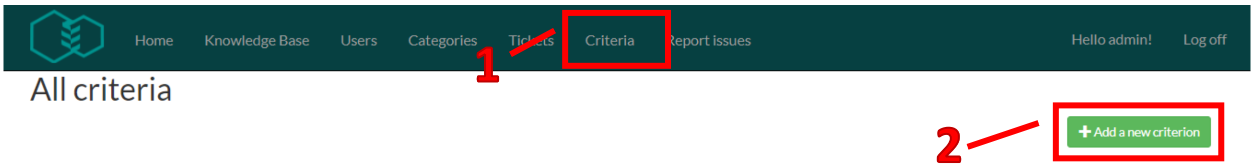

Figure 34: Creating criterion – index page

Step 3: Fill in the criterion (e.g. *How do you rate the service provided to you?)* then click **Done** (3 in Figure 35)

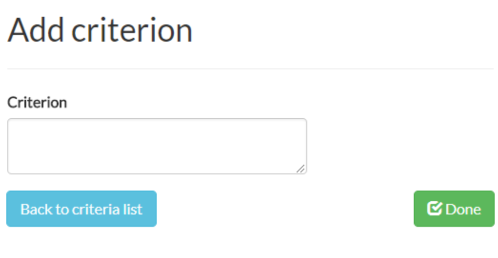

Figure 35: Create criterion form

3.2.6.2 Editing criterion

Criterion might be in need of updating and/or rephrasing. Therefore, it must be editable, if it becomes absolute, it can be set as inactive where you, admin, can see it but it is not used in feedback.

Step 1: Click **Criteria** in the navigation bar (1 in Figure 36) then **Edit** (2 in Figure 36).

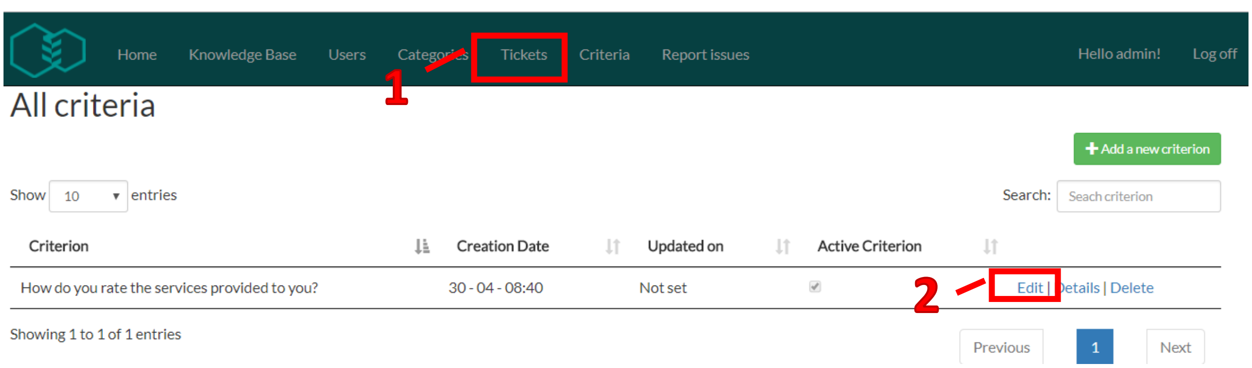

Figure 36: Criterion editing – index page

Step 2: Edit the criterion and click **Done** (3 in Figure 37)

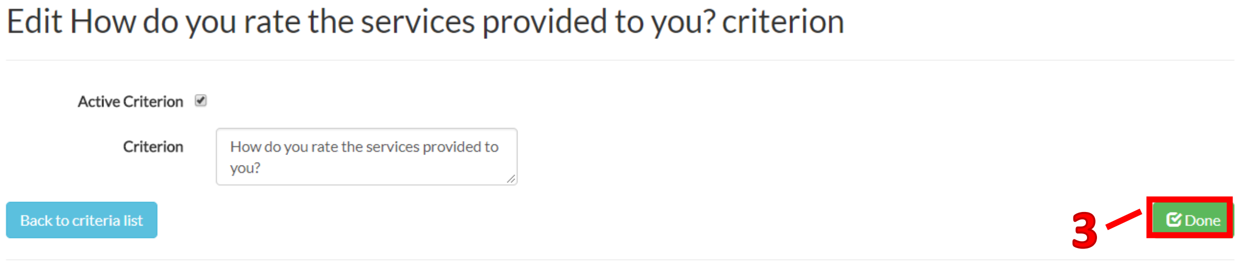

Figure 37: Editing criterion form

3.2.6.3 Viewing criterion

Step 1: Click **Criteria** in the navigation bar (1 in Figure 38) then **Details** (2 in Figure 38).

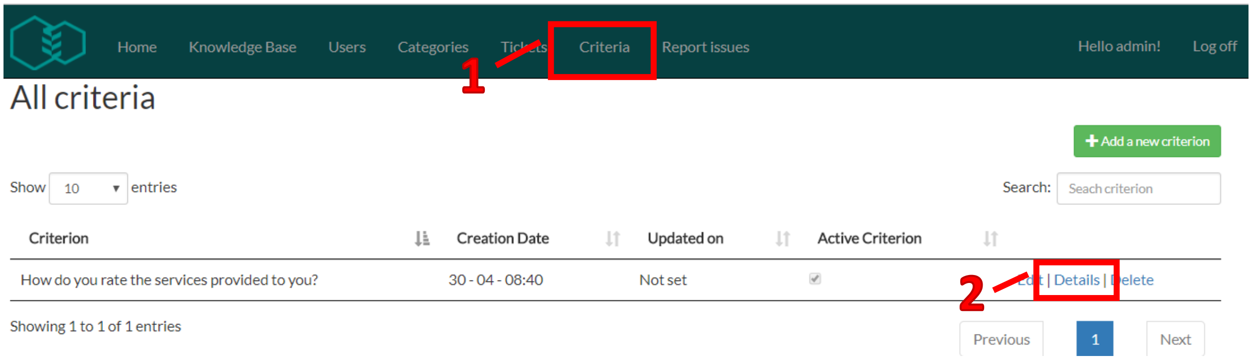

Figure 38: View criterion details

3.3 IT staff

Upon logging in, you will see the below navigation bar (Figure 39). Each tab will be discussed in the order they appear in.

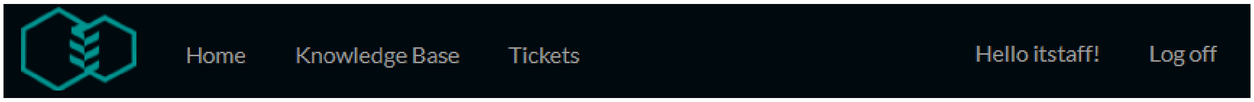

Figure 39: IT staff navigation bar

3.3.1 Home (see section **3.1.1 Home**)

3.3.2 knowledge base

As an IT staff, you have the following authorities:

3.3.2.1 Adding solution (see section 3.2.2.1 Add solution)

3.3.2.2 Editing solution (see section 3.2.2.2 Edit solution)

3.3.2.3 Deleting solution (see section 3.2.2.3 Delete solution)

3.3.3 Tickets

IT staff have the following functionalities over tickets:

3.3.3.1 Assigning ticket (see section 3.2.5.2 Assigning ticket)

3.3.3.2 Editing ticket (see section 3.2.5.3 Editing ticket)

3.3.3.3 Viewing ticket (see section 3.2.5.4 Viewing ticket)

3.3.3.4 Commenting ticket (see section 3.2.5.3 Viewing ticket)

3.4 Staff

As a staff user, you can see the following navigation bar in Figure 40.

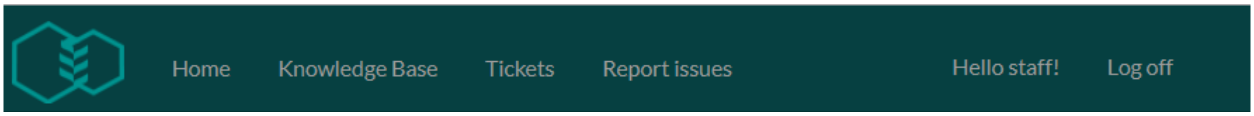

Figure 40: Staff navigation bar

3.4.1 Home (see section 3.1.1 Home)

3.4.2 knowledge base (see section 3.1.2 Knowledge base)

3.4.3 Tickets

You can, as a staff, create, view, comment, accelerate and give feedback to ticket.

3.4.3.1 Creating ticket

Step 1-A: Click **Report issues** in the navigation bar (1 in Figure 41).

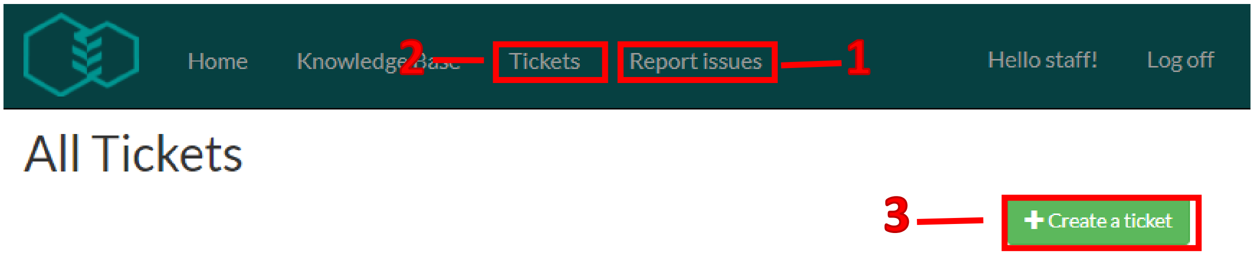

Figure 41: Create ticket – index page

Step 1-B: Click **Tickets** in the navigation bar (2 in Figure 41), then **Create ticket** (3 in Figure 41)

Step 2: Fill in the form with the issue subject (e.g. *printer jam*), choose a category (e.g. *hardware*) and describe the issue. Click **Done** (4 in Figure 42)

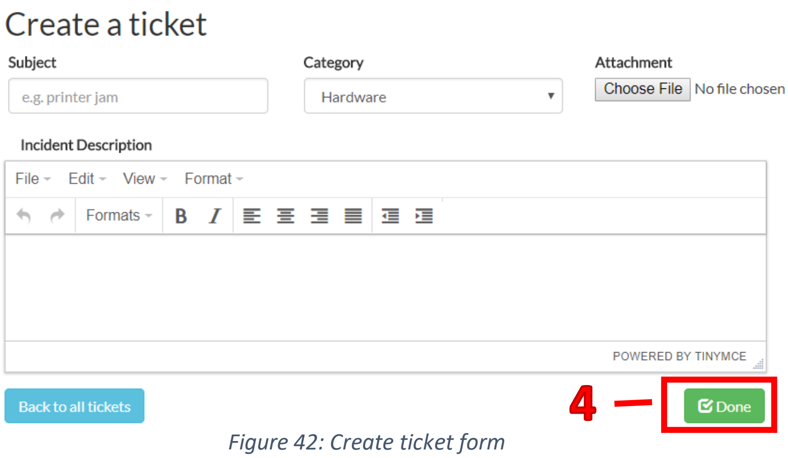

Figure 42: Create ticket form

3.4.3.2 Viewing ticket (see in section 3.2.5.4 Viewing ticket)

3.4.3.3 Commenting ticket (see in section 3.2.5.5 Commenting ticket)

3.4.3.4 Accelerating ticket

Accelerating tickets is a way of notifying the IT staff responsible and the admin that a ticket is need of being rushed.

Step 1: Click **Tickets** in the navigation bar (1 in Figure 43), then **Accelerate** (2 in Figure 43)

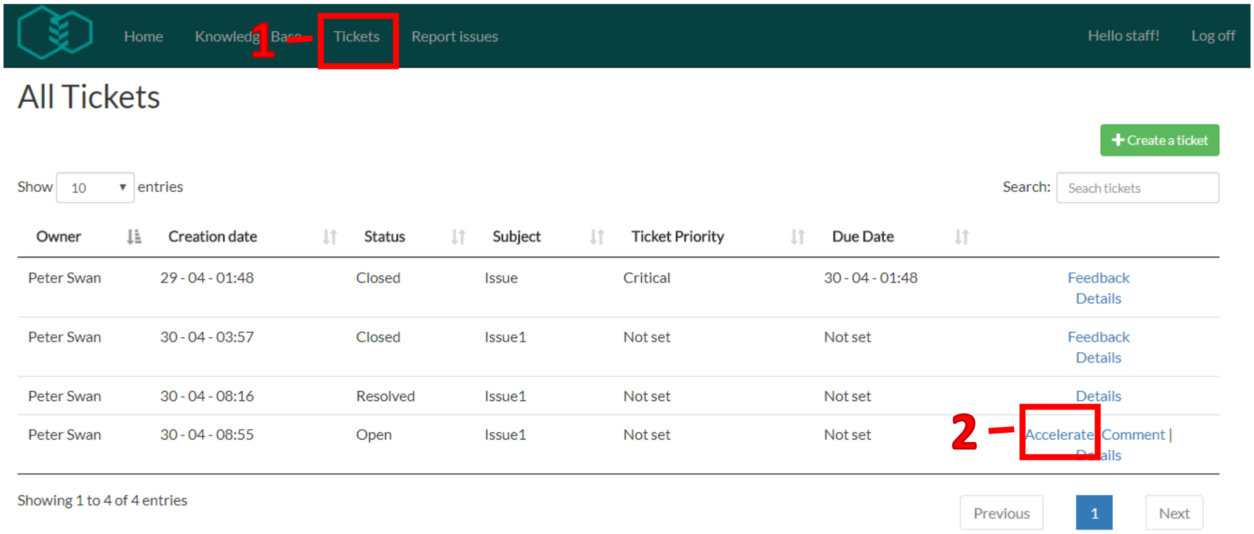

Figure 43: Accelerate ticket – index page

Step 2: Fill in the reason for your acceleration (e.g. *my boss is waiting for the SAP report*) click **Done** (3 in Figure 44).

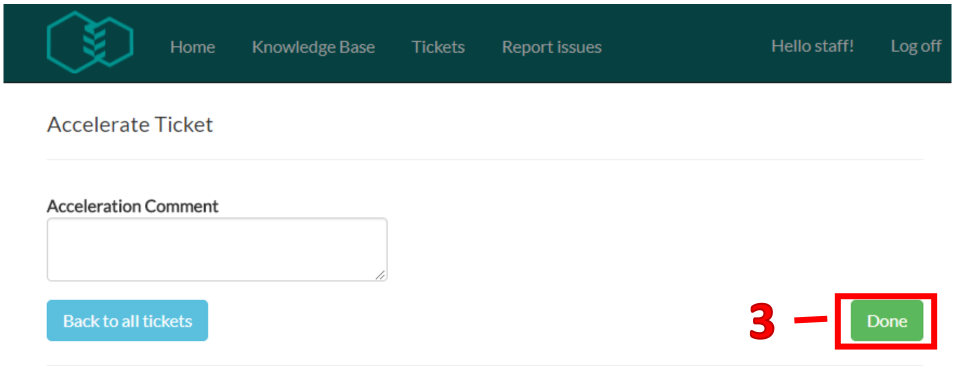

Figure 44: Acceleration form

3.4.3.5 Giving feedback

Feedback is one of the vital indicators of the IT staff performance. Therefore, after a ticket is closed, staff have the option to evaluate the services provided to them.

Step 1: Click **Tickets** in the navigation bar (1 in Figure 45), then **Feedback** (2 in Figure 45)

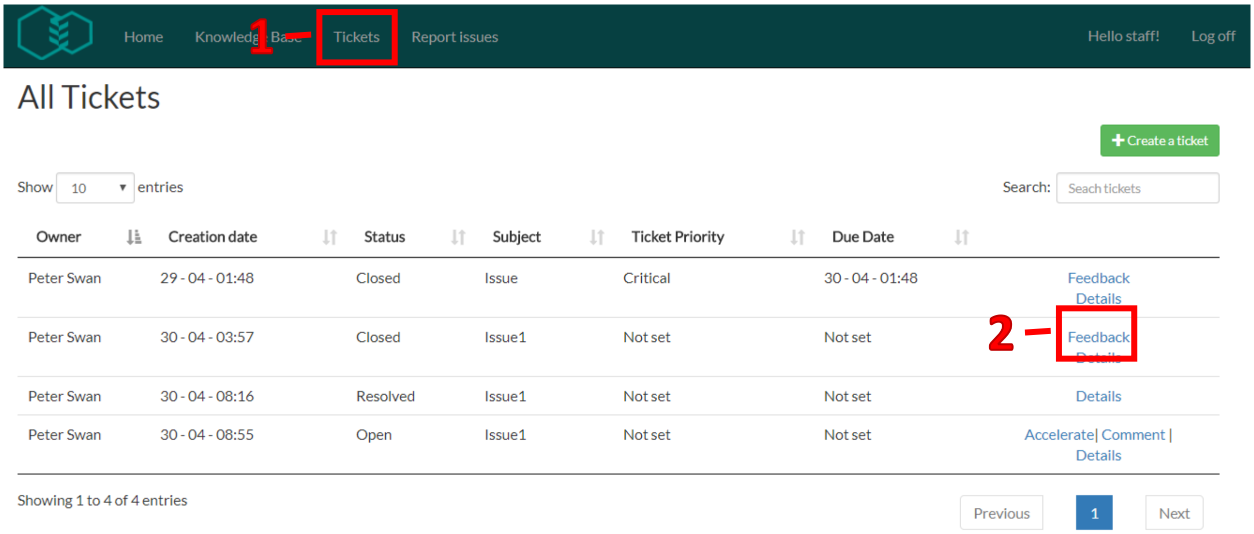

Figure 45: Feedback – index page

Step 2: Answer the questions by selecting one of the available answers. If you have any comments, add them in the comment box. Click **Done** (3 in Figure 46)

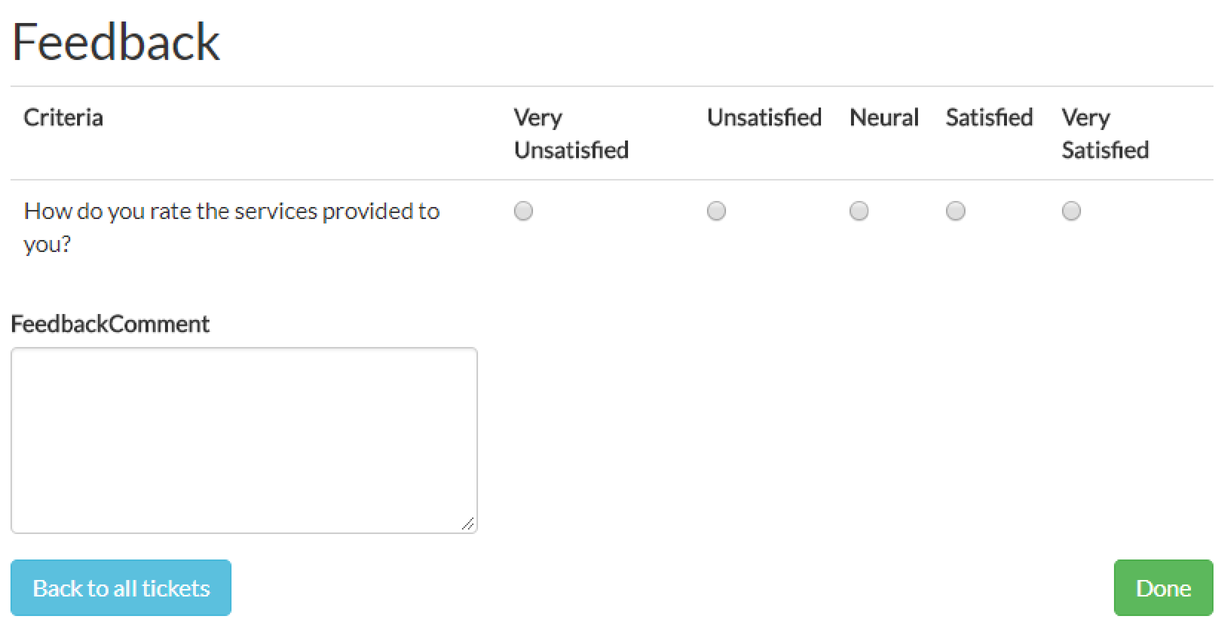

Figure 46: Feedback form

3.5 IT manager

As an IT manager, you will see the following navigation bar (Figure 47). Each tab will be explained in the order they appear in.

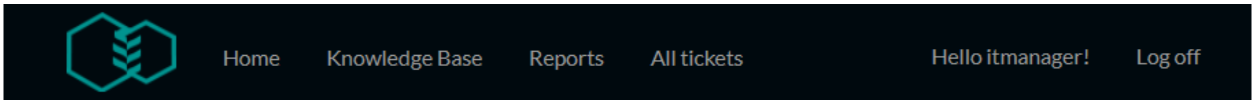

Figure 47: IT manager navigation bar

3.5.1 Home (see section 3.1.1 Home)

3.5.2 Knowledge base (see section 3.1.2 Knowledge base)

3.5.3 Reports

The reports are the reflection of the IT staff performance. As an IT manager, you can view the IT staff list and the tickets they have handled. In addition, you can view a ticket details and history.

3.5.3.1 Viewing reports

Step 1: Click on **Reports** in the navigation bar (1 in Figure 48).

Figure 48: Reports – IT manager

Step 2: Click on the **Details** to display the details of a specific IT staff (2 in Figure 49).

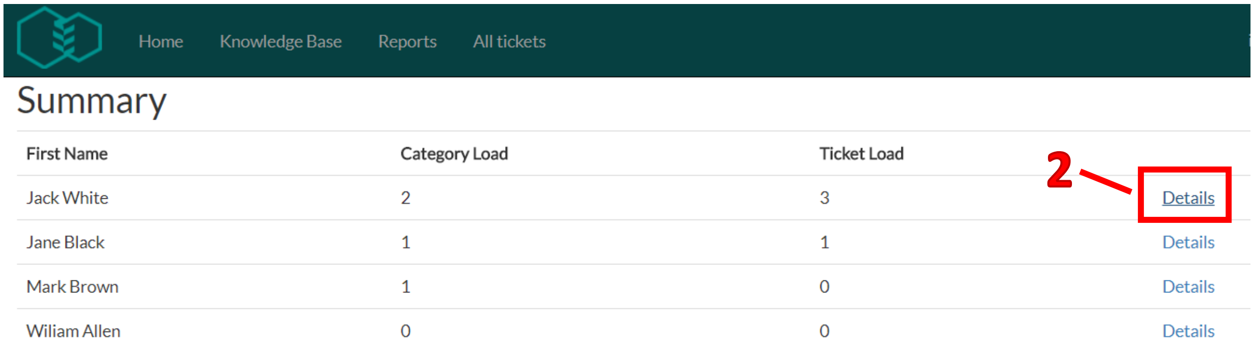

Figure 49: IT staff report details – index page

Step 3: Click on the **Details** to display the details and history of a specific ticket (3 in Figure 50).

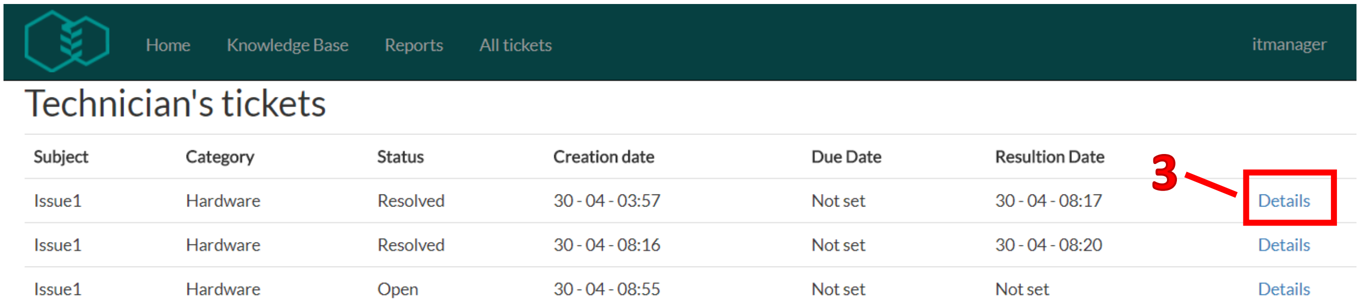

Figure 50: Ticket's details and history

3.5.4 All tickets

Viewing all the created tickets will give the IT manager the freedom to search for whichever tickets he wishes to see.

Step 1: Click on the **All tickets** on the navigation bar (1 in Figure 51).

Figure 51: All tickets

Step 2: Click on the **Details** to view the details and history of a specific ticket (20 in Figure 52).

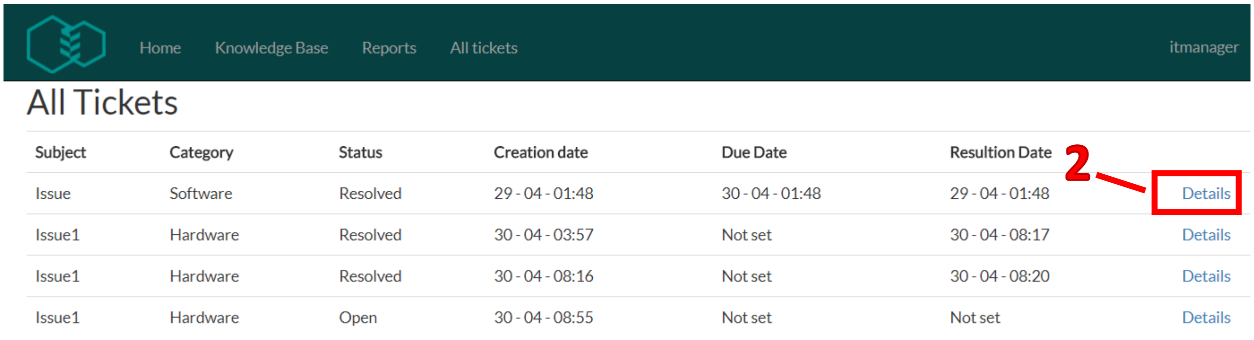

Figure 52: Ticket's details and history

Chapter 4: Troubleshooting

If you face any of these problems, try the following solutions.

Problem	Solution
Website not showing up the way it should	1. Close and reopen the website. 2. Use a different browser. Windows 8 and 10 recommended browsers are Google Chrome 65.0.3325.181 or Internet Explorer 11. Mac recommended browser is Safari 5.1.7. 3. Clear browser cache by (check browser support site for instructions) 4. Contact Help Desk System admin.
Certain pages are redirecting me to a login page repeatedly	1. This means that you are not authorized to access that page. If you think that access should be granted, contact IT Help Desk System admin.
Information showing up with <>	1. This problem might occur repeatedly, screenshot the information and submit a ticket with the screenshot attached to prevent similar results in the future. 2. If information is critical and time sensitive, try using HTML reader (www.codebeautify.org) to display it normally.
Ticket submitted can no longer be seen	1. IT Help Desk System does not allow for ticket deletion. Make sure that your Internet connection is stable when creating the ticket. 2. If problem persists, contact admin who will create one for you.
Date is in the wrong format	1. As of the release of this version (version 1.0), IT Help Desk uses the date format (day-month hour: minute). 2. If you have preferences/ suggestions, feel free to submit a ticket with the category “General” to inform Admin.
Ticket has passed its due date with no solution provided	1. Due date is an indication of the estimated time a solution will be provided, however, it is not fixed. 2. Accelerate the ticket by following the steps given in section 3.4.3.3 Accelerating ticket. 3. If help is provided in an unsatisfying manner, give feedback (follow steps in section XXXX) so that IT manager is informed of this occurrence.
Ticket is not submitting	1. Make sure that your Internet connection is stable when creating the ticket. 2. Make sure that you have entered all the required fields.

Table 2: Common problems and troubleshooting

Chapter 5: Keyboard shortcuts and FAQs

5.1 Keyboard shortcuts

As of this release (version 1.0), IT Help Desk System does not contain specific keyboard shortcuts. It uses the (**Tab)** to navigate between input fields, (**ctrl+c**) to copy and (**ctrl+v**) to pate text and images. Future releases are planned to include (**ctrl+n**) to take you to *Create ticket* page, (**ctrl+shift+n**) to take you to *Create ticket on behalf* page, (**ctrl+t**) to view *latest ticket details* (created or received) and (**ctrl+r**) to take IT manager to *summary page*.

5.2 Frequently asked questions

The following are some of the most occurring questions users have when interacting with IT Help Desk System.

5.2.1 How long will my ticket take to be solved?

A: This will depend on the priority of thee ticket in comparison to other tickets submitted around the same time period. If prioritized as critical, it will take a working day, if high priority, 3 working days, if medium, 5 working days and if low then it will take a week.

5.2.2 My ticket is taking too long to be solved?

A: feel free to request acceleration (see section 3.4.3.4 Accelerating ticket). Note that acceleration can be done only once.

5.2.3 I forgot to include some information in my ticket when submitting it (e.g. the operating system I am using)?

A: You can add a comment (see section 3.2.5.5 Commenting ticket) with the information you need to inform the IT responsible with. In turn, IT staff can reply to your comment.

5.2.4 I am not satisfied with the way the IT staff solved my problem?

A: you can provide feedback to closed tickets so that the IT manager can track the performance of the IT staff.

5.2.5 How many comments can I make to a ticket?

A: You are free to comment as much as needed. Only acceleration is limited to a onetime occurrence.

5.2.6 I have submitted a ticket but cannot give feedback on it?

A: Only closed (solved) tickets can be evaluated. Please wait till the IT staff proved the solution for you to evaluate.

5.2.7 I cannot see a solution in the knowledge base that I have previously been referencing?

A: IT staff and system admin have the ability to remove outdated solutions. If you feel the need to refer to a removed solution, inform IT staff by submitting a ticket with your inquiry (see section 3.4.3.1 Creating ticket).

Chapter 6: Glossary

- **Help desk:** The point of contact for users when there are service disruptions or for service requests.
- **Help Desk Admin:** The adminstrator of the system who has the authority to add users, edit users accounts, set tickets' priority and assign tickts.
- **Incident:** Unplanned interruption or reduction in the quality of an IT service.
- **Ticket:** A file in the help desk system containing comprehensive information about an incident or a service request that is reported by end user (or admin on behalf of end user) with a unique reference number.
- **Ticket status:** Status code indicates the condition of the ticket. It includes:
  - **Open:** Ticket has been recognized but not yet assigned/accepted.
  - **In-progress:** Ticket is in the process of being investigated and resolved.
  - **Resolved:** A solution has been put in place but has not yet been validated by the end user.
  - **Closed:** End user has agreed that the incident has been solved and gave feedback on the service received.
- **Knowledge base:** It contains data and information regarding past IT solutions and answers.

Chapter 7: Related documents

For more information, the following documents provide insights on the development and implementation of IT Help Desk System.

- **ReadMe file:** https://github.com/mamazyad/ITHelpDeskSystem/blob/master/README.md
- **Sprints documentation:** https://github.com/mamazyad/ITHelpDeskSystem/wiki

References

The following websites were utilized to gain insights on how to write this user manual:

https://docs.joomla.org/Special:MyLanguage/Portal:Administrators

https://www.userfocus.co.uk/articles/usermanuals.html

https://support.google.com/drive/?hl=en#topic=7000946

https://help.github.com/

https://support.office.com/en-us/word

https://www.drupal.org/docs/user_guide/en/index.html