OSTicket manual

OSTicket is your primary tool in the service desk and is what you will be using primarily for documentation. OSTicket is a ticketing service that we have employed in the service desk. The largest thing to keep in mind when documenting using the ticketing system is that you cannot document enough. Our company strongly believes that communication is the most important part of working in the service desk. Poor communication can potentially send the whole company downhill. To demonstrate this; here is an example.

*Johnny accepts a laptop from a customer at the beginning of his shift, ensuring all the documentation was signed. He works on it until the end of his shift, and has ruled out the possibility of viruses or malware. He leaves the service desk, not to return until Thursday. Johnny arrives at the service desk on Thursday, and notices the laptop is in a different place than before and that work has obviously been done on it. Johnny checks the ticket status to find that it was filled with reports about checking for viruses and malware, without any reports of his own.* ***What went wrong?***

In this scenario Johnny took a laptop in and forgot to create the ticket at the time the laptop was brought in. This lead to all of the work he had previously done going undocumented, resulting in similar work being done on the laptop for a second time. Poor communication is destructive to the work environment.

How to operate the OSTicket system basics

1. Submitting a ticket
   1. To submit a ticket sign on to OSTicket
   2. Click the button labeled “New Ticket” https://gyazo.com/b00e558cfeed9a8da3537b8dd3b5d106.png
   3. Fill out all the required fields (all of the information needed should be present on the form the customer fills out).
   4. Choose to assign it to yourself at creation of the ticket
   5. Click “Open” at the bottom of the screen. Done!
2. Reassigning a ticket.
   1. To reassign a ticket, sign in to OSTicket
   2. Locate the desired ticket you wish to reassign
   3. Open it
   4. Scroll to the bottom and select “Reassign ticket” https://gyazo.com/443f6296e3193ff41707522db83229b2.png.
   5. Enter a reason for reassigning, then hit reassign. Done!
3. Contacting customers
   1. To contact a customer sign in to OSTicket
   2. Locate the ticket of the customer you wish to contact
   3. If you wish to contact the customer by phone then use the phone number at the top of the screen https://i.gyazo.com/41bbbfde416090c07a872b2057c5b6ab.png
   4. If you wish to contact the customer by email scroll down to the bottom of the page
   5. Type the message you wish to send to the customer
   6. Click “Post reply”. Done!
4. Posting an internal note
   1. To post an internal note on a ticket sign in to OSTicket (if not already)
   2. Locate the ticket you wish to post a comment on
   3. Select the “Post internal note” button 
   4. Type out the note you wish to add to the ticket.
   5. Click the “Post Note” button. Done!
5. Changing a tickets status to resolved (Customer notified of end result)
   1. To change a tickets status sign in to OSTicket
   2. Locate the ticket that requires a status change
   3. Document the solution/end result and notify customer
   4. Change the ticket status to “Resolved”
   5. Click “Post Reply” Done!
6. Closing a ticket (Customer picks device up)
   1. To close a ticket sign in to OSTicket
   2. Locate the ticket correlating to the customers device
   3. Post an internal note stating that the customer has received the device.
   4. Change ticket status to “Closed”
   5. Click “Post reply” Done!
7. Creating an FAQ
   1. To create an FAQ sign in to osticket
   2. Hover your mouse on the “Knowledgebase” tab
   3. Click on “FAQ’s”
   4. Select the category you wish the new FAQ to be in.
   5. Click “Add new FAQ” 
   6. Fill out your new FAQ and then hit “Add FAQ” Done!