Clientele HelpDesk Manual

Clientele HelpDesk software is used to log all activity within CNS. Whether it is a phone call from a faculty member or a visit to CNS by a student, all activity needs to be logged, so that we can track the amount of time spent on issues and what those issues are.

This manual will guide you through the software, so that you can become familiar with its features and how to use the software effectively.

Logging into HelpDesk

When you double-click on the HelpDesk icon, you will be prompted to login. At this prompt, enter your username (same as your Email ID) and your password (by default it is the same as your username, although you may change it later on the Tools menu).

Once you login, you will see the Welcome Screen, as shown below.

On this screen, you will notice two pieces of information. First, you will see the number of items in YOUR queue. These are tasks assigned to you to complete, either by other CNS staff or items you have created for later resolution. Second, you will see the number of items in the .General queue, which are the items not assigned to a user and require attention.

Viewing Ticket Queues

From this point, you have several options... You can either view your own queue, view the General queue, or search for People to register new tickets.

First, let's discuss viewing your queue. Periodically, Beth, Ryan, John, Scott or Lewis will assign you items directly for resolution... The other reason there will be items in your queue is if you create a new ticket and assign it to yourself.

To view this queue simply choose "My Open Calls" on the left navigation menu, shown in Figure 3. When you choose this option, you will see the My Calls queue shown to the left.

If you have items in your queue, you can double-click on them to pull up the details, which is discussed later. If you do not have any items, the list will be blank.
If you have no items in your queue, you should proceed to the .General queue to evaluate which calls need attention.

To do this, click on the Calls option from the left navigation menu. In the window that appears, you can search for certain criteria, or you can simply type .General into the "Assigned To" field as shown.

Viewing Ticket Events

As you search for .General, you will see the list of tickets in the queue in the figure above. By double-clicking on these tickets, you will see the details of the ticket. You can also Add Events to update the ticket with status reports and resolutions. If a ticket has only one event with it, the details will appear as shown below (left), however, if the ticket has multiple events, it will be show multiple events as shown below (right). Double-clicking each event opens the details for review, although you can choose the Summary button to view all events together (Figure Not Shown).
Modifying Tickets
(Adding New Events)

To modify a ticket, just click on "Add Event"... enter the details and click OK to submit it.

When entering details, you must also choose a Contact Method. Usually, this will be Phone, V-mail or On-site.

You can also change who the call is assigned to by clicking the "..." button to the right of Assigned to:

Note: Please do not enter a call without the following information: Name, Phone, and Description!

Entering New Calls

This is the most complicated part of using HelpDesk, since it requires two steps.

First, you must lookup the person you are creating a ticket for.

To do this, click People on the left navigation list to bring up the window shown to the left.

Enter the name of who you are looking for and press Enter. If you are entering a call for a student, simply type Student instead of their name.

Double-click on their name to show their details and click OK.
As you will see in the figure below, the Contact’s Information will show in the white box on the left navigation menu. From here, click the V down-arrow next to “New” and choose New Call. The window that appears is identical to the Modify Call (Add Event) window.

Enter your call details thoroughly, assign it to the appropriate person, and click OK.