

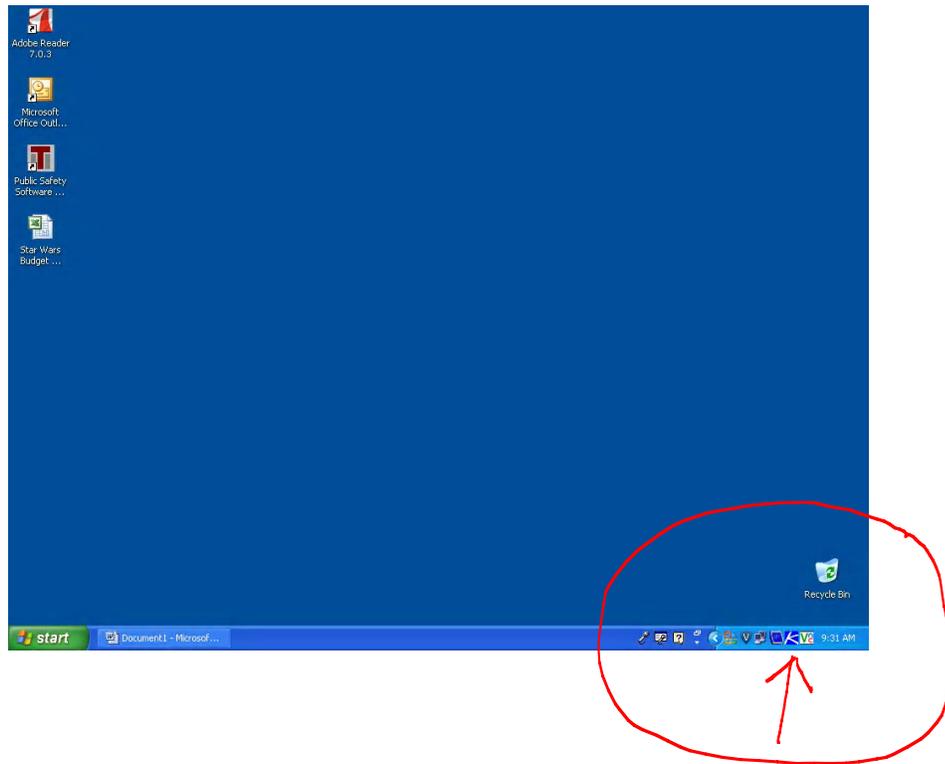
Kaseya  
Help Desk  
Ticketing Software

By  
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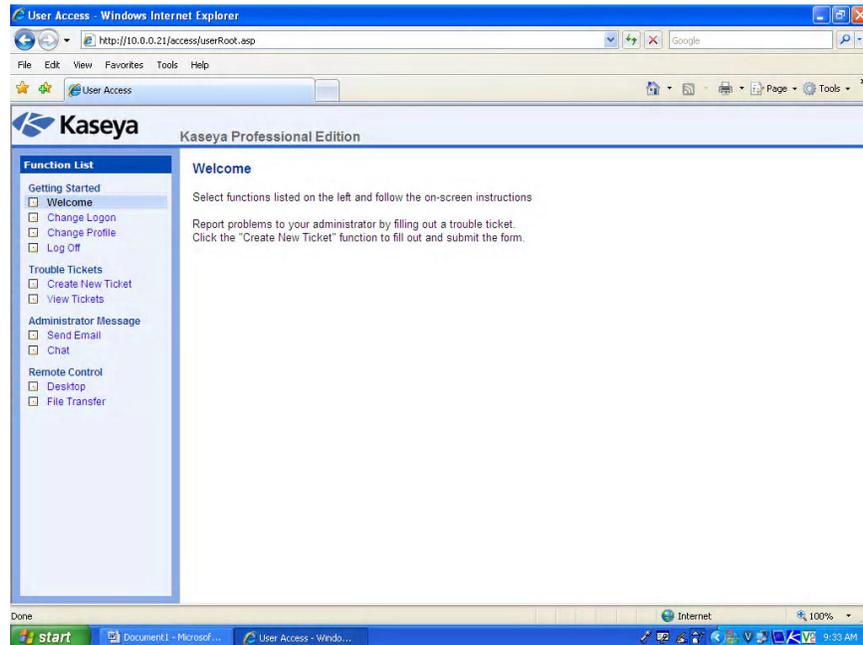
## To Submit a Help Desk Ticket

From the desktop, on the bottom right hand area of your screen, select and double click on the K icon.



## Welcome Screen

Your welcome screen should look like this:



## Create New Ticket Screen

A menu of options is available on the left side.

Select the Create New Ticket option. (Example below).

To create a new trouble ticket, you will need to populate these seven **required fields**:

- I. **Summary:** This information will be the title of your issue. Be brief, specific and unique. This field will allow you differentiate your tickets and allow the IT staff to, at-a-glance, understand your issue.
- II. **Name:** Use your complete name.
- III. **Email Address:** You will receive messages from the IT staff about your ticket.
- IV. **Phone Number:** This is how the IT staff will contact you if you do not have access to Email.
- V. **Enter New Note:** Where you will enter a detailed description of your issue.
- VI. **Select Category:** Select from the drop down menu.
- VII. **Priority:** Select from the drop down menu.

The rest of the fields on the page are either populated by the system or they are optional. After the ticket is created, the information can be used by you for future reference.

The screenshot displays the 'Create New Ticket' form in the Kaseya Professional Edition web interface. The form is contained within a browser window titled 'User Access - Windows Internet Explorer'. The left-hand navigation pane shows a 'Function List' with 'Create New Ticket' selected. The main form area includes a 'Ticket ID' field with a value of 'c01131-tmo1-oc-training-lab'. The 'Summary' field is empty. The 'Submitter Information' section contains fields for Name, Email, and Phone. The 'Assignee' is set to 'unassigned', 'Category' is 'Application problem', 'Priority' is 'Normal', 'Status' is 'Open', and 'Hours Worked' is '0.0'. Below this is an 'Enter new note' section with a 'Note Size' field, a 'Submit' button, and an 'attach file' button. A red circle highlights the 'Summary', 'Submitter Information', 'Assignee', 'Category', 'Priority', 'Status', and 'Hours Worked' fields. A red arrow points to the 'Create New Ticket' option in the sidebar.

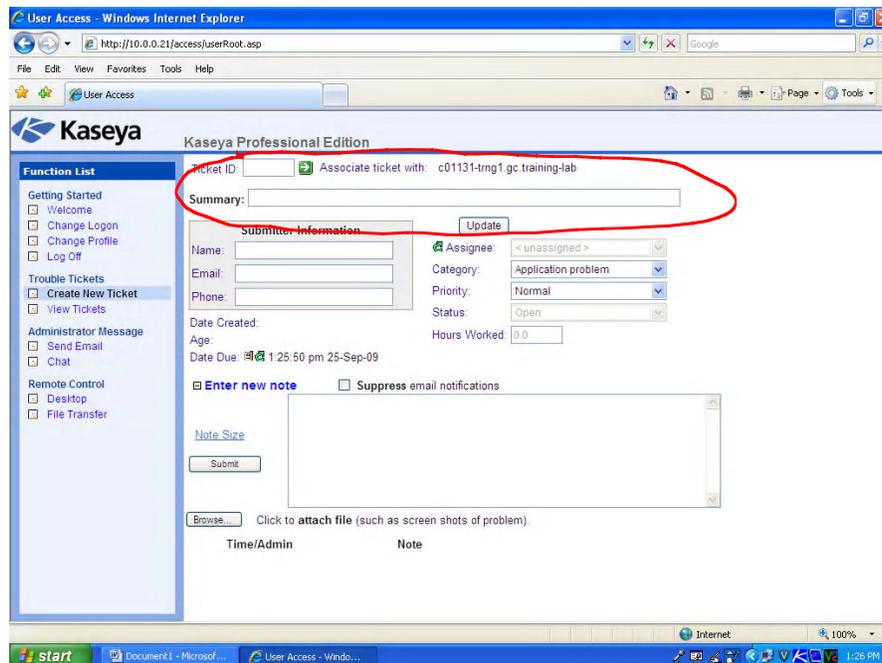
Explanations for these fields will follow on the next several pages.

## Summary Field

This will be the title of your issue. Be brief, specific and unique. This field will allow you to differentiate between your tickets while allowing the IT staff to, at-a-glance, understand your issue. This is where you can describe your general problem.

Example: Need to install Office Compatibility Pack Software; Telephone will not ring at my desk...

PLEASE NOTE: This is a required field. If you forget to fill out the Summary Field section, an error message will appear when the ticket is submitted.



The screenshot displays the Kaseya Professional Edition web interface for creating a new ticket. The browser window is titled "User Access - Windows Internet Explorer" and shows the URL "http://10.0.0.21/access/userRoot.asp". The interface includes a navigation menu on the left with sections like "Getting Started", "Trouble Tickets", "Administrator Message", and "Remote Control". The main content area is titled "Kaseya Professional Edition" and contains the following fields and options:

- Ticket ID:  Associate ticket with: c01131-trng1.gc.training-lab
- Summary:  (highlighted with a red circle)
- Submitter Information:  Name,  Email,  Phone,  Date Created,  Age,  Date Due (1:25:50 pm 25-Sep-09)
- Assignee:  < unassigned >
- Category:  Application problem
- Priority:  Normal
- Status:  Open
- Hours Worked:  0.0
- Enter new note:  Suppress email notifications
- Note Size:
- Submit:
- Browse... Click to attach file (such as screen shots of problem).
- Time/Admin:  Note:

## Submitter Information

**PLEASE** include *all* of your contact information. In many areas of this application, the IT staff will only see your computer ID. By providing complete, detailed contact information, the IT staff will be able to contact you if they require additional information.

**Name:** Use your complete name.

**Email Address:** Please provide the email address that you would like to use to receive messages from the IT staff about your ticket.

**Phone Number:** Please provide a number the IT staff will be able to contact you. If you are traveling remember to provide your cell phone number or alternate contact information.

The screenshot shows the Kaseya Professional Edition web interface in a Windows Internet Explorer browser. The page title is "Kaseya Professional Edition". The main content area is titled "Create New Ticket" and contains the following fields and options:

- Ticket ID:  Associate ticket with: c01131-tmg1.gc.training-lab
- Summary:
- Submitter Information (highlighted with a red circle):
  - Name:
  - Email:
  - Phone:
- Date Created:
- Age:
- Date Due: 11:37:08 am 14-Sep-08
- Assignee: < unassigned >
- Category: Application problem
- Priority: Normal
- Status: Open
- Hours Worked: 0.0

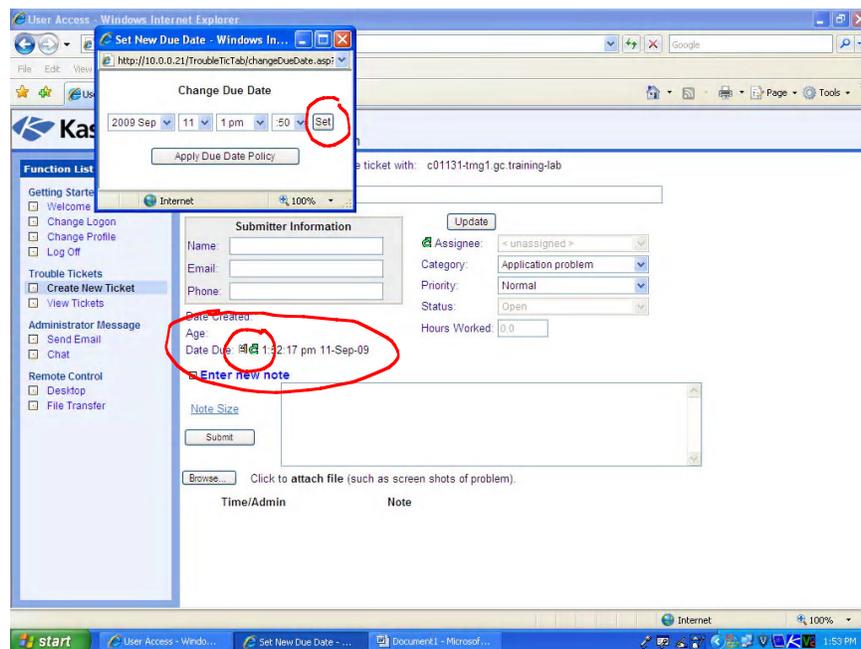
Below the form, there is a section for "Enter new note" with a "Note Size" input, a "Submit" button, and a "Browse..." button to attach files. The bottom of the page shows a taskbar with the start button and several open windows.

## Due Date Section (*Optional*)

Use this section only if there is a deadline for this task.

Example: If you need flash installed on your computer before a web cast at 9 AM on Friday, then you would select Friday for the date and 9 AM for the time. In the notes section, please explain that you have a web cast on Friday at 9 AM. Click on **Set** to change the date. Populating this section will flag the importance of the date and time so that the IT staff can fully understand your need.

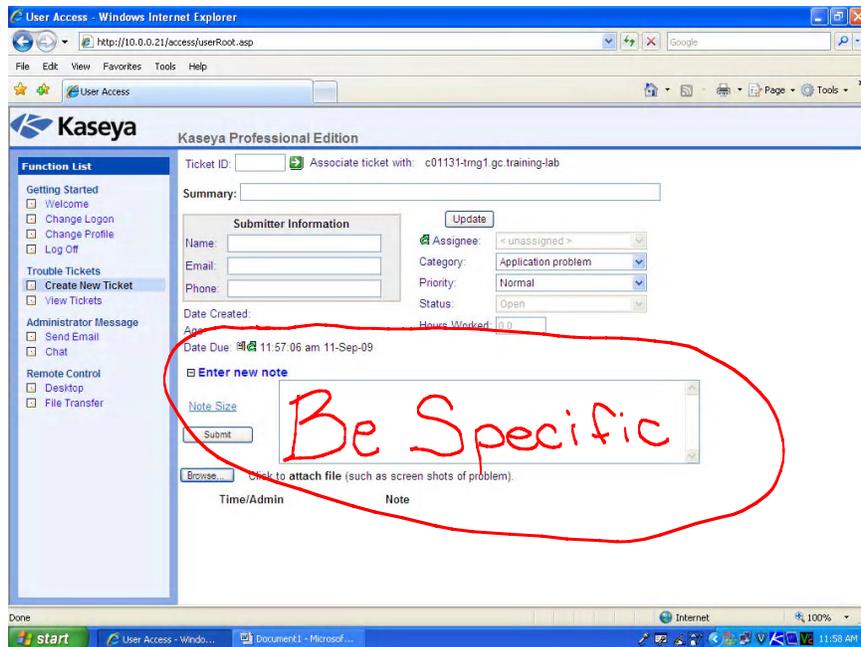
If you hover over the two icons next to the due date, you will notice the pop ups of **Change Due Date** or **Always Apply Due Date Policy**. Select either option and the following screen will appear:



**Enter a New Note (*Be as detailed and specific as possible.*)**

This section is for you to explain, in as much detail as possible, the problem, issue, concern, or reason that IT assistance is needed. Also include any details about what type of troubleshooting has already taken place or any actions that you have tried. Be sure to detail how and when the problem started, what program(s) you were using at the time and the specific error message(s), if possible.

\*\*If you are creating a ticket for another computer, please type the inventory number of that computer in the notes section. The inventory number can be found on a sticker on your computer, laptop or printer. This sticker will also say “PROPERTY OF GUNNISON COUNTY.” The inventory number will be on the third line down from the top and is necessary for the IT staff to assist with solving your problem. The IT staff will also be tracking tickets associated with some of the County’s more “problematic” pieces of equipment to help to build a history for each specific piece of equipment.

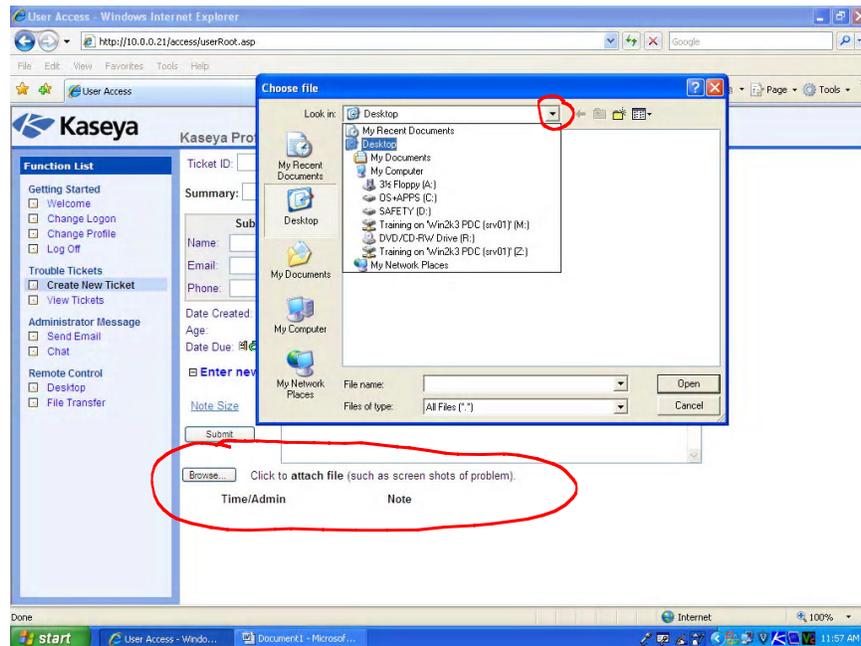


## Browse (Optional)

This option allows you to attach files that are related to the ticket (i.e., screen shots, documents or other files needed by the IT staff to help resolve your issue).

PLEASE NOTE: To create a screen shot of your error message, hold down the **CTRL** button while pressing the **PRINTSC** button at the top of your keyboard next to your F12 button. Open a blank Word, WordPad or Notepad document and press **CTRL-V** to paste the error message into your document. Please save the document onto your computer and then click on the **Browse** button to locate and select the saved document.

They say that a picture is worth 1,000 words. Any help provided to the IT staff will help to solve the problem and will be greatly appreciated!



## Category

In this section, you will be able to choose from the following:

**Application Problem** – Choose this option if you are having a problem with a specific application (program) used by your department, or if you are having a problem with any other application (program) such as Microsoft Office.

**Network Problem** – Choose this option if you are unable to get to your shared drives or network printers.

**Install Software** – Choose this option if you have an update for an application(s) that is specific to your department (i.e., Blue Ribbon, Fundware, ITI, Apex, etc.).

**Printing Problem** – Choose this option if your printer will not print.

**Phone and Voice Mail** – Choose this option if your phone or voice mail is not working, if you need a new handset, if there are crackling noises on the phone line, etc.

**Copy Machine** – Choose this option if you need assistance with a copy machine.

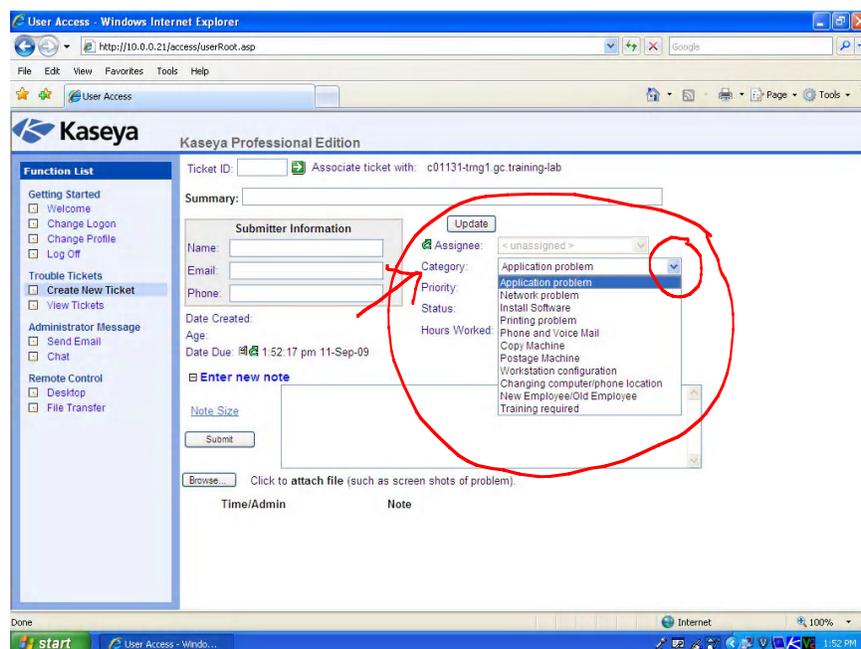
**Postage Machine** – Choose this option if you need assistance with a postage machine.

**Workstation Configuration** – Choose this option if you need a PC removed or added or the IT staff would use this option to create a ticket to rebuild a computer station.

**Changing Computer/Phone Location** – Choose this option if you need to relocate a computer or phone.

**New Employee/Old Employee** – Choose this option if you need to set up a computer and phone for a new employee. The IT staff will need the new employee's name spelled correctly, the start date, what equipment will be required (i.e., computer, phone, etc.), and where the employee's workstation will be located. For old employees, the IT staff will need to know the date of separation and the name of the staff member that will need access to the former employee's files until a replacement is hired. The IT staff will also need to set up a new password until all the old files are transferred to the new employee.

**Training Required** – Choose this option if you need technical training related to working with programs or equipment.



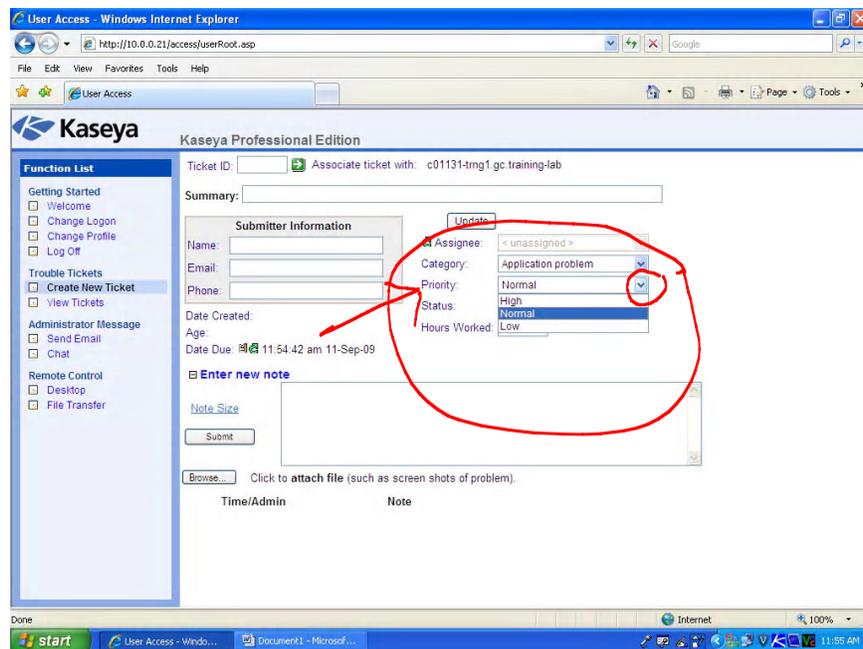
## Priority

Use this to assign a priority to your ticket as follows:

**High:** Use this is for problems that need immediate attention only. *Please do not use “High” just to get the IT staff to evaluate a problem immediately unless a true emergency exists.*

**Normal:** Use this for problems that need attention. This would be used for typical issues.

**Low:** Use this for problems that do not require immediate attention or do not need to be done right away.



## Explanation of Other Fields

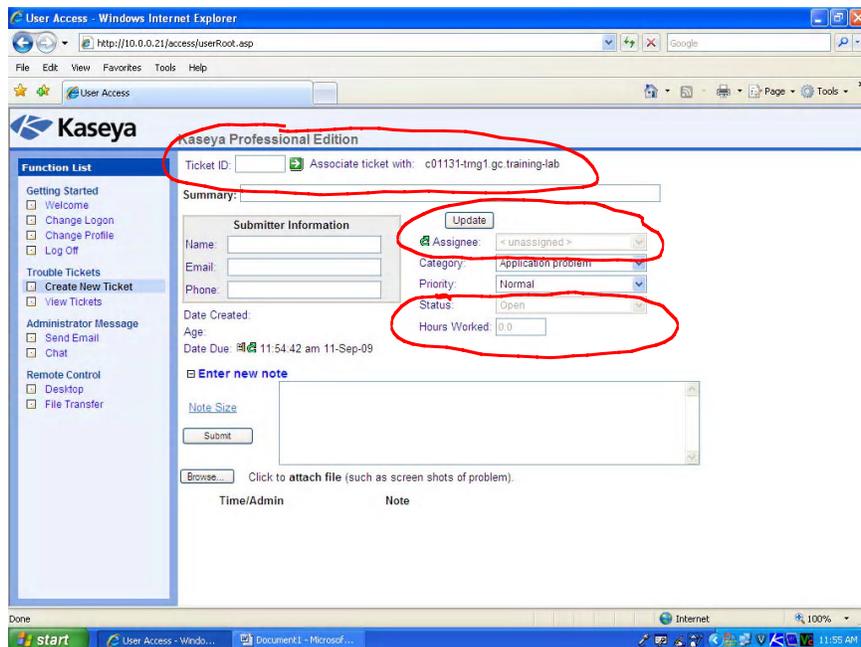
The following fields are automatically populated by the system after you submit the ticket.

**Ticket ID:** This is automatically generated by the system in the order in which the ticket is received. This is not a field that you can change.

**Associate Ticket:** This will be followed by your computer ID number. This too is a number that you cannot change. The computer that is used to create the trouble ticket will automatically generate this information.

**Status and Hours Worked:** This will be updated by the system administrator to track the amount of IT staff time necessary to resolve the ticket.

**Assignee:** This is completed by the IT staff when work begins on your trouble ticket.



## Submit

Before you submit a trouble ticket, **review your information**. Once a ticket is submitted and accepted by the system, edits cannot be made to the ticket. Only attaching notes or documents will be allowed after the ticket is submitted.

After all of the information has been reviewed for accuracy and completeness, click on the **Submit** button. When adding notes to the ticket, you can use the **Update** or **Submit** button.

You will receive an email message confirming that the system has received your ticket. When the IT staff works on your ticket and adds any notes, you will receive an email confirmation. Responding directly to the email message will automatically attach the response to the ticket.

***Please read all email coming from Kaseya, as there may be a request for more information that IT staff members are waiting for in order to complete your trouble ticket.***

The screenshot shows the Kaseya Professional Edition web interface. The page title is "Kaseya Professional Edition". The main content area contains a ticket form with the following fields and options:

- Ticket ID: [input field]
- Associate ticket with: c01131-rmg1-gc-training-lab
- Summary: [input field]
- Submitter Information:
  - Name: [input field]
  - Email: [input field]
  - Phone: [input field]
- Update: [button, circled in red]
- Assignee: [dropdown menu, currently showing "Unassigned"]
- Category: [dropdown menu, currently showing "Application problem"]
- Priority: [dropdown menu, currently showing "Normal"]
- Status: [dropdown menu, currently showing "Open"]
- Date Created: [input field]
- Age: [input field]
- Date Due: 11:57:06 am 11-Sep-09
- Hours Worked: [input field, currently showing "0.0"]

Below the form, there is a section for adding notes:

- Enter new note: [input field]
- Note Size: [input field]
- Submit: [button, circled in red]
- Browse...: [button]
- Click to attach file (such as screen shots of problem).
- Time/Admin: [input field]
- Note: [input field]

The left sidebar contains a "Function List" with the following items:

- Getting Started
  - Welcome
  - Change Logon
  - Change Profile
  - Log Off
- Trouble Tickets
  - Create New Ticket
  - View Tickets
- Administrator Message
  - Send Email
  - Chat
- Remote Control
  - Desktop
  - File Transfer

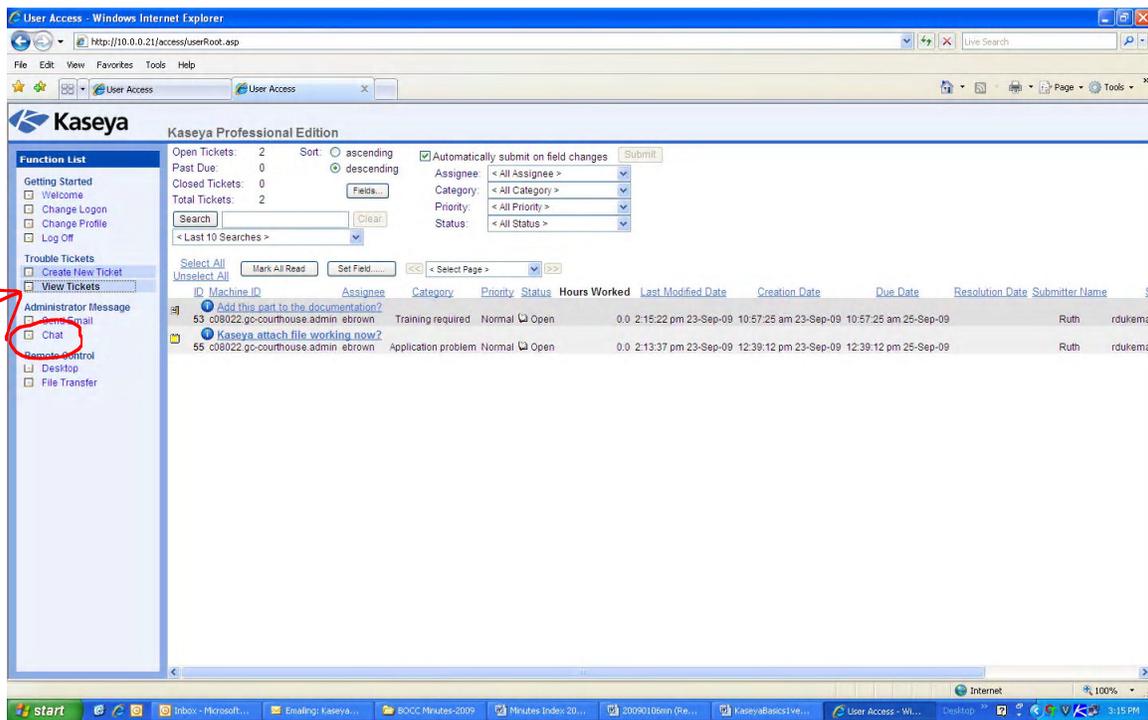
The bottom of the screenshot shows the Windows taskbar with the Start button, several open windows, and the system tray showing the time as 11:58 AM.

## Notes

After submitting your trouble ticket, you can access your ticket in Kaseya by double clicking on the K icon in the lower right corner of your desktop screen.

From the menu on the left side, select **View Tickets** found under the Trouble Ticket heading.

Select the appropriate ticket from the menu. It is also possible to search for a specific ticket from a set of available criteria.



If you discover new information that you would like to share with the IT staff, select **Enter New Note**. After your note is complete, click on the update button. This will allow you to add any additional details about your ticket.

It is also possible to use the **Browse** button to attach a file to the existing ticket.

Chat is available on the **Administrator Message** menu on the left. Select **Chat** if you would like to send/receive instant messages to the IT staff member that is signed into Kaseya at that moment in time.

Thank you. If you have any questions, please call 641-1410 or email us at [support@gunnisoncounty.org](mailto:support@gunnisoncounty.org).