

Supportworks

Supportworks Quick Start Guide

Supportworks Training

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Supportworks Training

Supportworks – what is it?

Supportworks is the call/job management system, used by support teams throughout the University to allocate and track support requests.

Some Terminology

Who's Who

Analyst – member of staff or student who uses Supportworks to manage support requests

Support Team – logical or physical group of analysts who support a particular system or function

Customer (Requester) – member of staff, student or 3rd party who requests support from analysts (can be another analyst)

Call Classes

Change or Service Request - The addition, modification or removal of an IT Service or asset

Incident or Fault – An unplanned interruption to an IT Service or asset, or reduction in the quality of an IT Service or asset.

Change Control – Used by infrastructure teams to propose, authorise/reject and record changes made to IT systems and services

Software Testing Issue (SLP) – Used by SLP functional and technical teams to report issues during system testing phases

Call Status

A support call has a lifecycle, and will be in one of the following statuses at any given time.

Unassigned – the call has not yet been assigned to an analyst, but resides at team level

Unaccepted – the call has been assigned to an analyst, but has not yet been accepted

In Progress – the call has been accepted by an analyst

On Hold – the call has been placed on hold until a specified time/date (analyst awaiting further information etc.)

Off Hold – the “on hold until” time has passed

Escalated(O) – the call has been escalated to its owner

Resolved – the analyst has signed off the request as complete, and awaits feedback (if any) from the requester

Closed – no requester feedback required – work is complete. The system will automatically close resolved calls 10 calendar days from resolution

Cancelled – call is a duplicate of another call and has been raised in error, or customer cancels request before analyst has had time to action it

Logging In

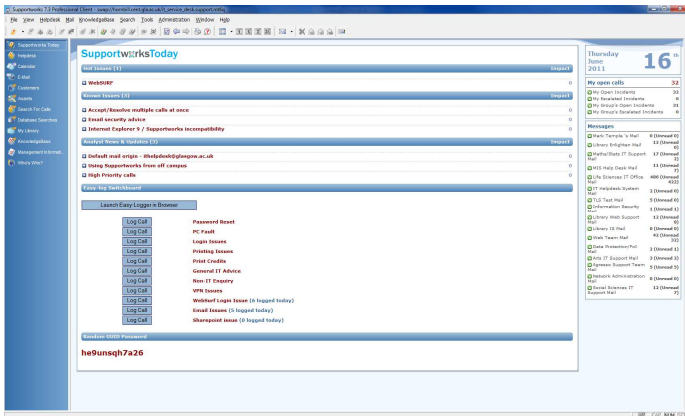
Launch Supportworks from your Start Menu or desktop icon, then enter your GUID and associated password, and click on the Login button.



The Interface

Supportworks Today

The first screen that you'll see when you log in is known as "Supportworks Today". This is where you'll see general alerts, together with quick access links to your support team's calls.



Helpdesk View

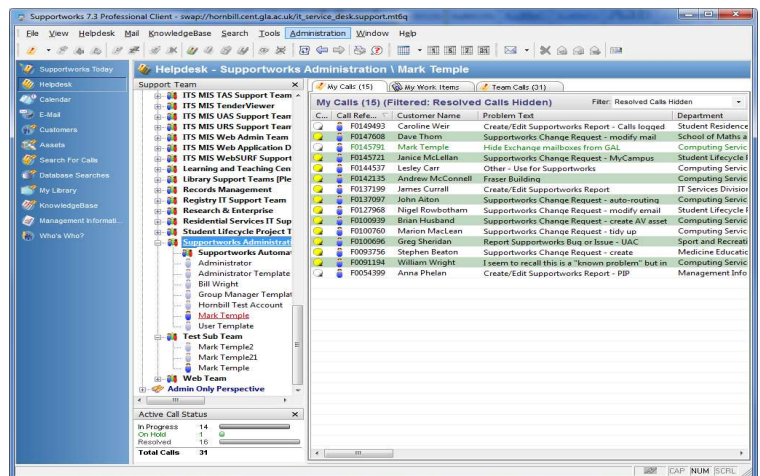
The Helpdesk View displays a list of support teams (the support tree), together with any calls assigned to you or your team. You can also view a graph showing the status and number of calls currently assigned to you and your team.

Column headings can be sorted in ascending or descending order, and you can move their position around to suit your needs. Grid lines, diary previews and alternate row colours can also be switched on to help differentiate one call from another.

Client Configuration

Tools/Options and Settings

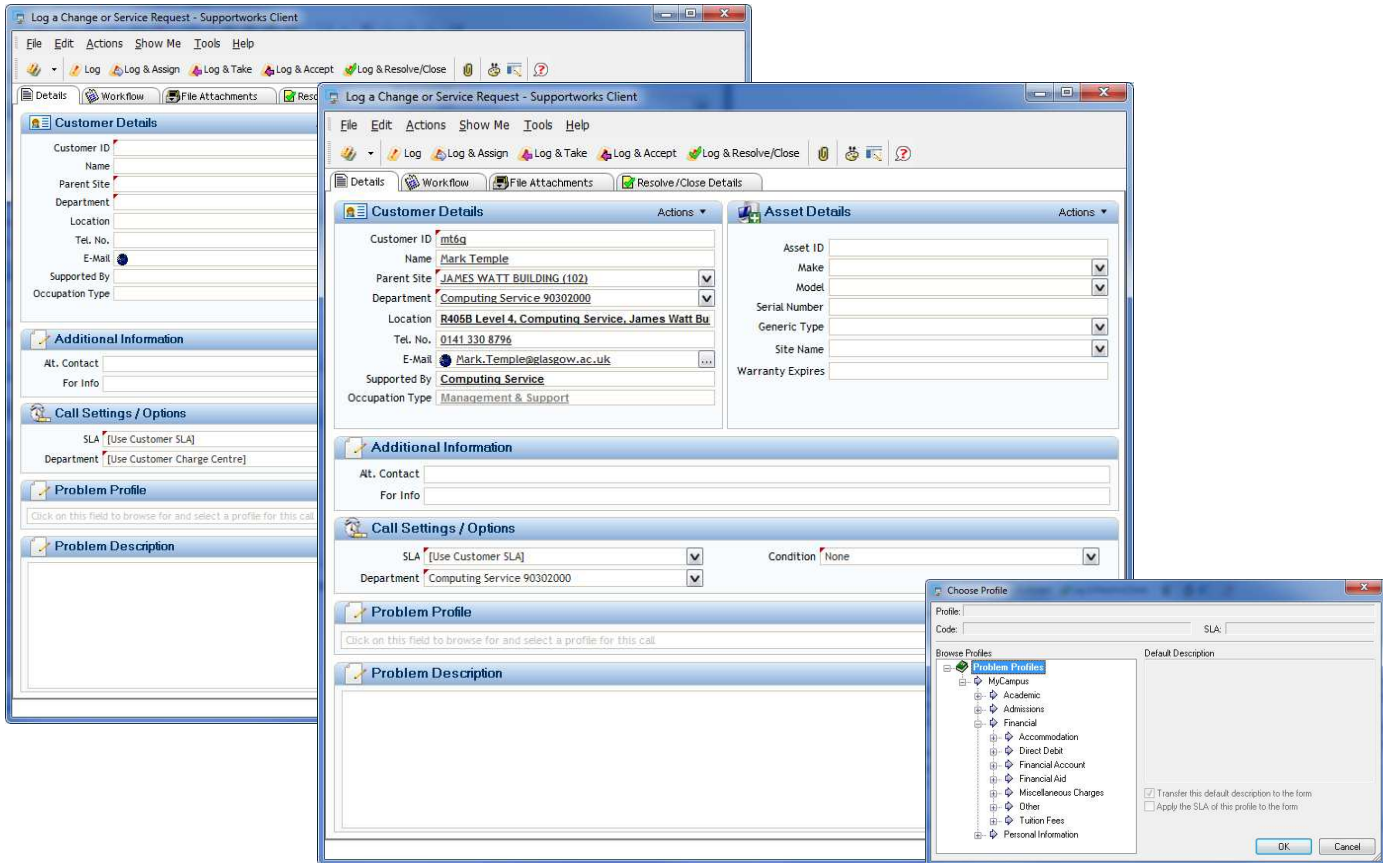
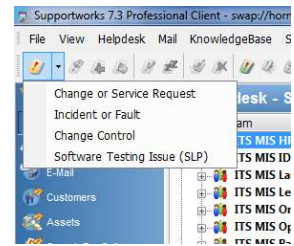
1. Check all Preferences boxes (under settings tab)
2. Spelling – set the options which suit you best
3. Email – select appropriate email templates for your team/role, then select email format
4. Default Mail Origin – **MUST** be set to a routable address - IT Helpdesk System (ithelpdesk@glasgow.ac.uk)



Logging a Call

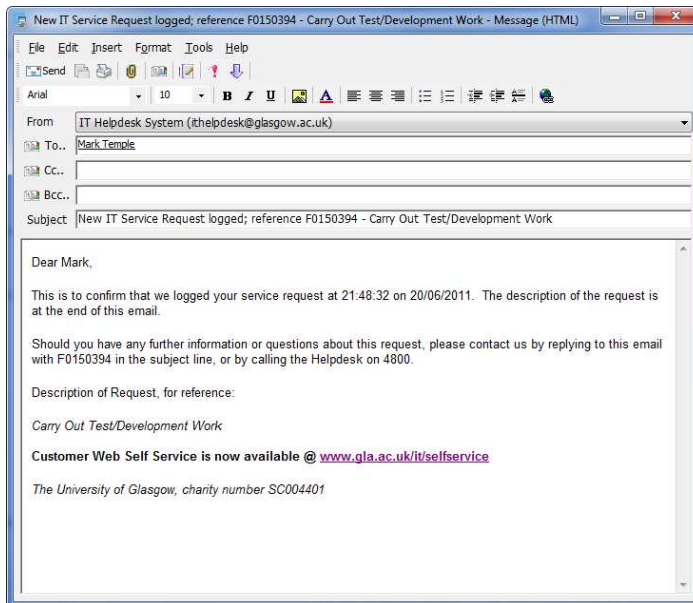
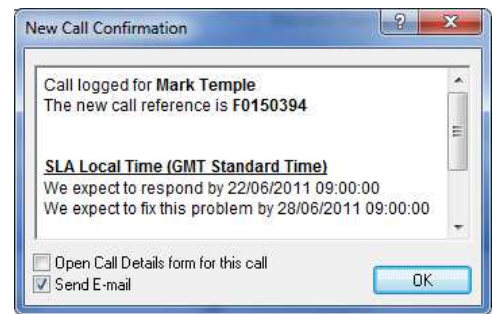
1. Click on the “Log New Call” button, then select a call class from the list.
(Change or Service Request, or Incident or Fault)
2. Fill in the requester’s details

The left hand fields are all “lookups”, so will search on the criteria you specify as soon as you tab out of the field. The requester’s details will resolve if only one record is found, or you’ll be presented with a pick list if more than one record matches.



3. Fill in alternative contact details if relevant, otherwise click in the “Problem Profile” field to launch the problem profile picker.
Select the appropriate SLA for the impact and urgency of the request.
Expand the profile tree to reveal the functional areas, then expand these to drill down to the appropriate sub level. Select the final level of detail, then click on OK.
This will transfer the default description shown in the right hand pane into the Problem Description field.
You can then supplement this information with any other relevant text. Screenshots or other files can be attached by clicking on the paperclip icon, then following the “Open File” dialogue box to navigate to your file(s).
4. Log the call using the appropriate Log Call option.
 - a. Log – will log and assign the call to the team whose context you are in at the time.
 - b. Log & Assign – will log the call and assign it to the team or analyst who you pick from the pop-up list.
 - c. Log & Take – not widely used.
 - d. Log & Accept – will log the call and assign it to you. Response timer will stop.
 - e. Log & Resolve/Close – will log and resolve the call in one operation.

5. Sending the requester a confirmation email.
 - a. Click OK when prompted to by the “New Call Confirmation” pop-up.
 - b. The email template will now launch, giving you the opportunity to review the email before sending it to the requester. The requester will only receive the email if you click on the Send button – it’s not magic.



Updating a Call - you can update any call that you have access to i.e. calls owned by other team members

Like many windows-based interfaces, there are a number of ways of achieving the same outcome – the following outlines a couple of ways of updating a call, but the method of accessing these options is the same for subsequent events in the call's lifecycle.

1. Open the call by double clicking on it in the Helpdesk View, then click on the “Call Diary” tab to view the call's progress to date.

Select the Update Call icon in the toolbar (notepad and pencil), or Update Call option from the actions menu.

This will launch the “Update Call” form.

Key your update into the “Action Description” field below. Uncheck “Update to be public” if you do not wish the requester to be able to view this update via self service. Uncheck “E-mail customer” if you do not wish to send the update to the requester.

2. Click on the “Update” button once you have completed the above, or “Update and Assign” if you wish to then pass the call to another team or analyst.

3. The email template will now launch if you left this option checked, giving you the opportunity to review the email before sending it to the requester or other (advisor of studies).

4. The requester's email address and name, together with the call details and any template text will automatically be filled in for you.

Please note that you may be presented with a choice of templates, depending on your role or team i.e. update may be to AoS, and not requester .

5. Click on “Send” once you have reviewed the email's contents.

Accepting a Call assigned to you or your team

Accepting a call confirms to others that you have taken ownership of it, and are dealing with it.

To accept a call, either open it up as in section 1 of “Updating a Call”, then click on the “Accept Call” button (pink arrow pointing left), or open it up and then select the “Accept Call” option from the actions menu.

Either of the above options will launch the “Accept Call” form, which you will notice, is almost identical to the “Update Call” form; the same options apply for “Update to be public”, and “E-mail customer”.

Click on the “Accept” button when you are ready accept the call.

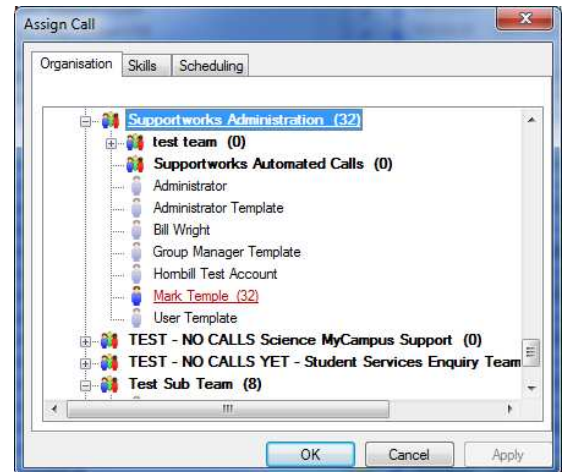
Assigning a Call

You will assign a call to another analyst or team for any number of reasons – a few examples being:

1. You are a team leader/supervisor allocating the call to one of your staff
2. You are a support analyst allocating a call to colleague because the request requires a particular skill which they possess
3. You have worked on a call and are now passing it to another team or analyst for further investigation/completion
4. The call has been incorrectly assigned to you or your team i.e. the request is outwith you or your team's remit or expertise

You can assign a call to another team or analyst by simply dragging the call from the list of calls in your Helpdesk View, then dropping it on the appropriate team or analyst in the support tree.

Another way to assign a call is to open the call, then click on the "Assign Call" toolbar button (notebook with grey arrow pointing to right) or "Assign Call" from the action menu, which will in turn launch the "Assign to" form displaying all available support teams and analysts. This list will be longer than the support tree which you will be used to seeing towards the left of your screen, as it contains teams whose calls you won't normally have access to.



Please note that you should always assign calls at team level unless you have been dealing directly with another analyst, as the receiving team are best placed to decide who is available to work on the request.

Placing a Call On Hold

You will normally place a call on hold when you are waiting for information from the requester or a 3rd party. "On Hold" will not escalate any further as their timers are stopped, but will go "Off Hold" if the "on hold until" time passes without the analyst taking the call "Off Hold" themselves. A call which has a status of "Off Hold" must be accepted again by its owner in order for them to resolve it. "Off Hold" calls will also become visible in the queues of all of your fellow team members.

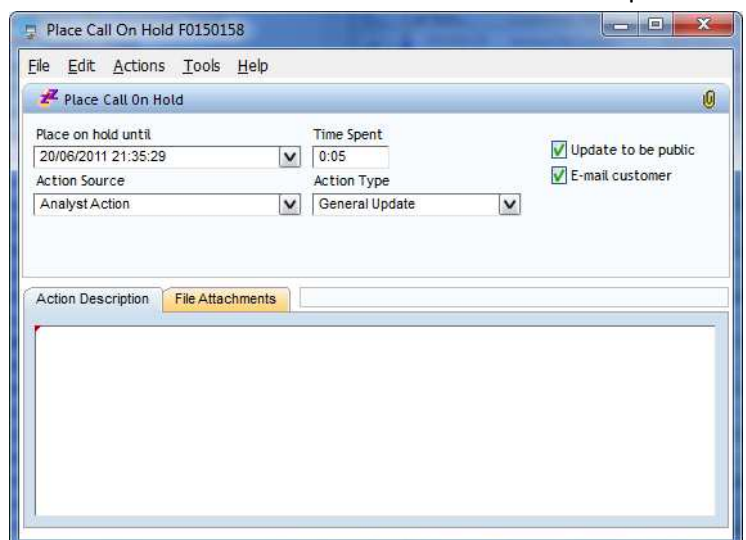
To place a call "On Hold", open the call, then click on the "Place Call on Hold" toolbar button (two purple Zs) or "Place Call on Hold" from the action menu, which will in turn launch the "Place Call on Hold" form.

Two fields are mandatory: when and why?

Click on the "Place on hold until" drop down menu, then select an appropriate time and date (when?) using the picker.

Type in the reason (why?) for placing the call on hold into the "Action Description" field, then click on the "Place Call On Hold" button if you are happy with any other selected options.

An "On Hold" email template will be displayed if you requested this, and the process of sending the email is the same



Taking a call “Off Hold”

You may wish to take a call off hold before its “on hold until” time has been reached e.g. the requester may have responded to you straight away.

To do this, simply click on the same button that you used to place the call “On Hold”, and you will notice that it now reads “Take Call Off Hold”. The call will now return to a status of “In Progress”.

Resolve a Call

There are two options left to you when a call has reached its natural conclusion and there is no more work to be done on it – resolve it or close it.

You will more often than not resolve a call, as the call can still be updated with requester confirmation text or “Thanks very much”, as the system will automatically close the call 10 calendar days after resolution, giving the requester time to come back to you if they are not happy with the outcome.

Closed calls drop out of your Helpdesk View, and can only be viewed by first searching for them using the left hand or top menu options.

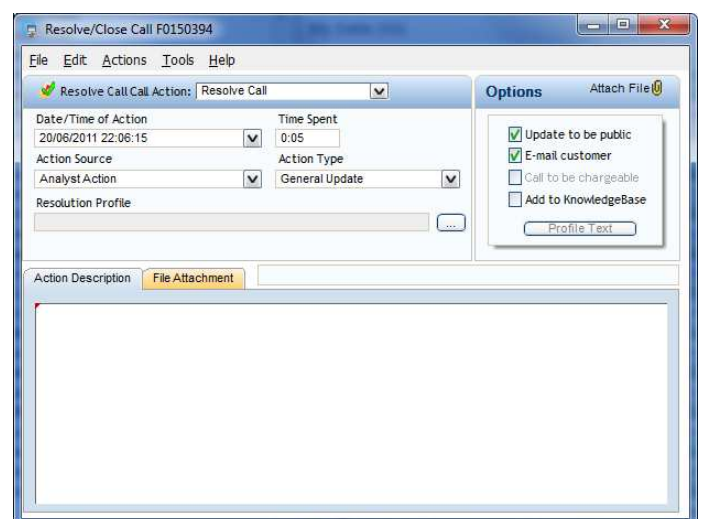
To resolve a call, open the call by double clicking on it in the Helpdesk View, then select the Resolve Call icon in the toolbar (notepad and green tick), or Resolve Call option from the actions menu.

This will launch the “Resolve/Close Call” form.

Click on the button marked with ... (to the right of the resolution profile field), then select the appropriate profile as you did when logging a call. Please note that there may be more resolution profiles than there were logging/problem profiles.

Key your resolution text, (which should be an overview of how the call was resolved) into the “Action Description” field below. This update should be public, and you should send the requester an email to confirm that the call is now closed.

There is also an option to add the call to the knowledgebase, but it is preferable for you create FAQs via Supportwork’s Knowledgebase menu option, as these tend to be more structured, delivering better results.



Analyst Email Notification

As an analyst, you can elect to receive email notification when a call is assigned to you, to a team which you are a member of, or both. You can also receive email notification when a call which you own is updated by another analyst or the requester (via self service).

This mechanism saves you having to sit watching Supportworks, waiting for call updates or assignment, and ultimately helps us manage concurrent licence usage.

Searching

The two main entities which you will want to search for are Customers (staff, students and external 3rd parties), and Calls. You will normally perform these searches via the left hand menu options.

Searching for Calls

Click on the “Search For Calls” option, then enter your search criteria in the appropriate field. Like any search, the quality of the information which you supply will determine both the quality and the quantity of the returned result set. NB - the default result set is limited to 500 records, but you can adjust this if required.

There is also a “Free Text Search” option which can be utilised (sparingly) if you are unable to supply any of the structured search criteria. This type of search is likely to return a poor quality result set, and is extremely resource intensive, so should only be used as a last resort.

Searching for Customers

Click on the “Customers” option in the left hand menu, and follow the same procedure as you would do searching for calls.

Timesaving tips

MultiClips

The MultiClip Item Editor, to give it its Sunday name, is a persistent clipboard which gives you a right-click option to insert pre-populated blocks of text into diary updates or emails.

The editor is accessed via the Tools menu, and new blocks can either be defined for personal or group use.

To add a new block, select “New Block” from the menu, then give it a meaningful name, type in the block of text, then save it under the group or personal headings. You can drag a block from one heading to the other.

Quick Log Calls

You can pre-populate call logging templates for frequently requested profiles/events by partially completing the call log details, then saving the details via File/Save As/Quick Log Call. Give the quick log call a name, then click on save, and the quick log call will now be available to you via the drop down arrow to the right of the Log Call button.

Knowledgebase

Knowledge can be defined as a resolved/closed call, FAQ, or external document.

You can search the Knowledgebase from your left hand menu option, as requesters can from self service, and can help to populate the Knowledgebase using the top menu options within the Supportworks client.

In short, an FAQ consists of a description of the problem, a description of the solution to the problem, some keywords to help requesters and other analysts search for it, and the option of whether the article can be viewed by requesters via self service.

External documents (in most popular text formats) submitted as knowledge are indexed by Supportworks (i.e. it reads them, making their contents searchable too).

Please remember the “garbage in, garbage out” principle when adding content to the knowledgebase, as inaccurate or out of date knowledge could be more misleading and potentially damaging than no knowledge at all.

Self Service

All staff and students can submit support requests via customer web self service, accessed via the MyGlasgow portal, or directly via www.gla.ac.uk/it/selfservice

Access is controlled using the requester's GUID and password, and different categories of staff/students will see different options and profiles when they log in.

