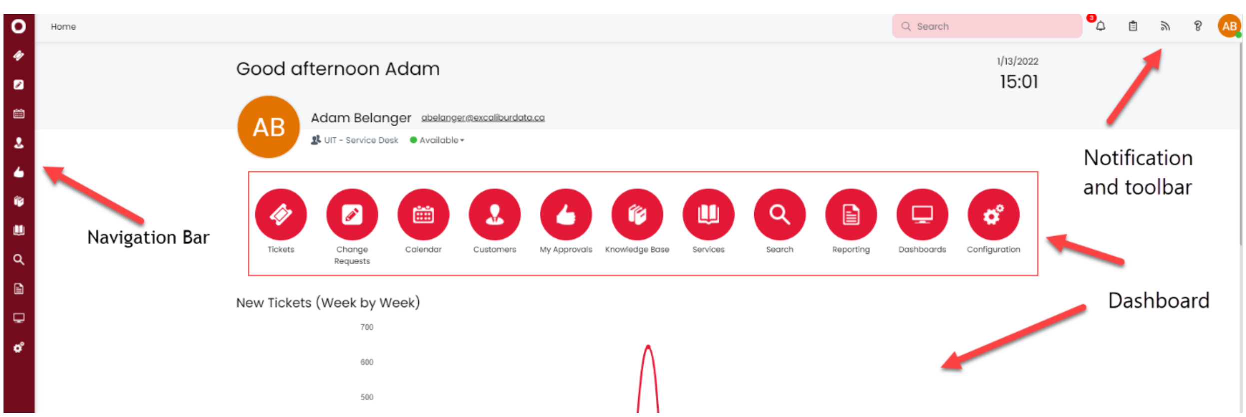
# Quick reference guide

IT Training Curriculum

# Lesson 1

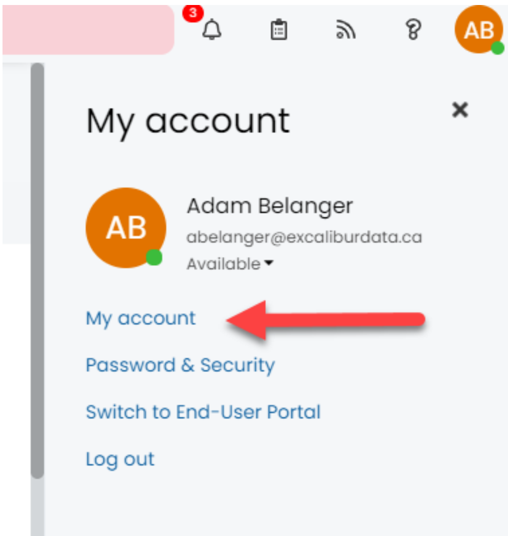
1. **Login to HaloITSM**
    a. Go to the following URL: [https://askus.yorku.ca](https://askus.yorku.ca)
    b. You will be taken to the Passport York login screen where you will have to provide your current credentials (see below)


2. **Basic structure within the platform**

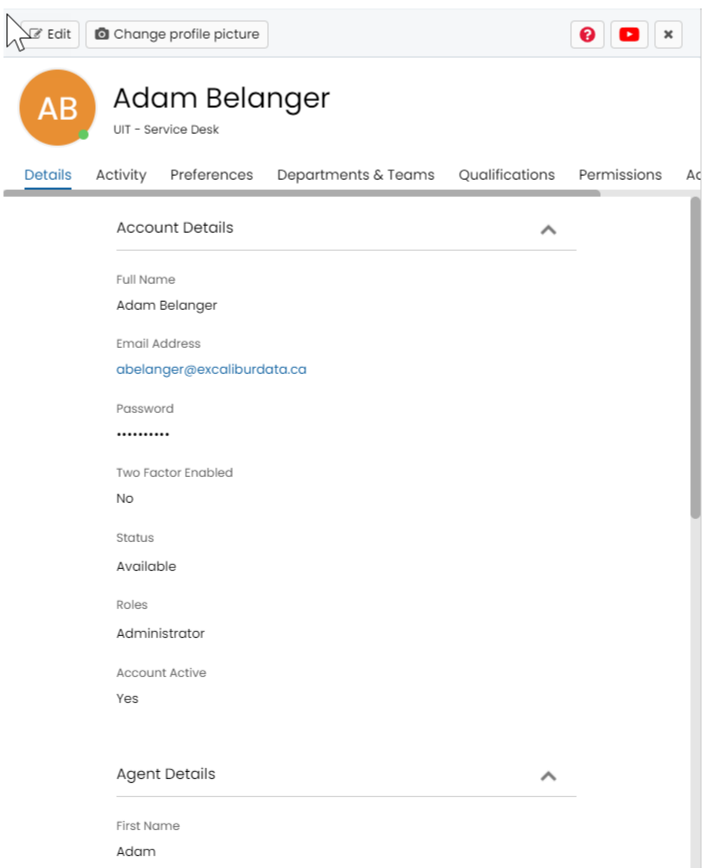



3. **Perform navigation within the side menu (see above – Navigation Bar)**

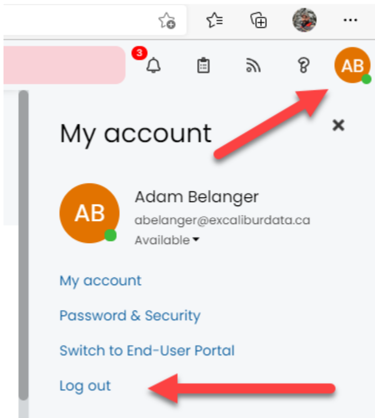
**4. My Account menu / options that are available (see below)**



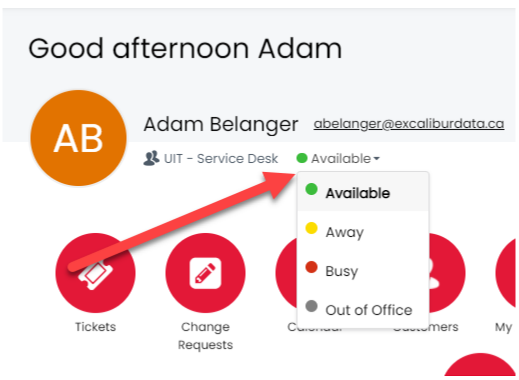

a. When you click My account, you are presented with the options below



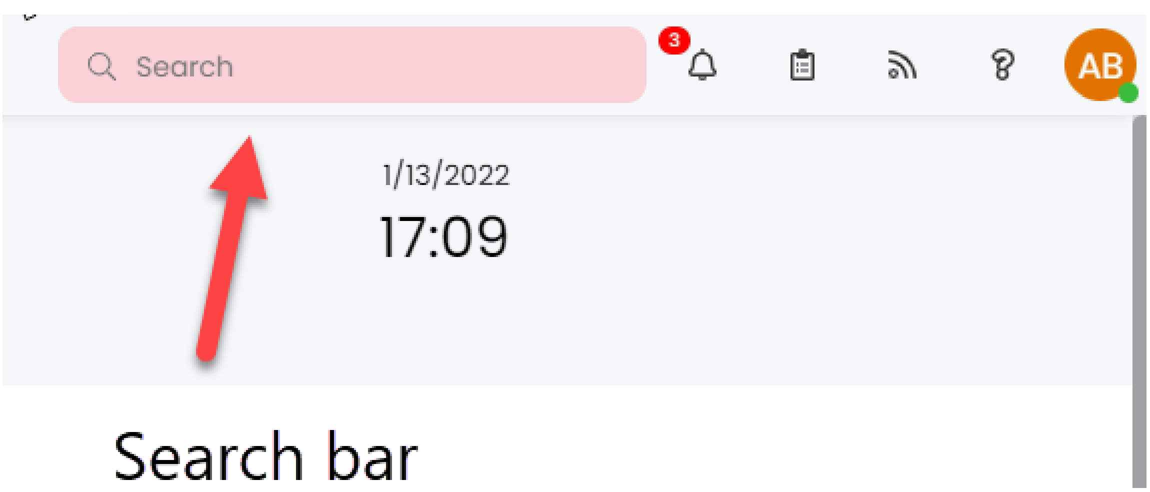
5. **How to log out of the system (see below)**




6. **Change your status within the system (see below)**

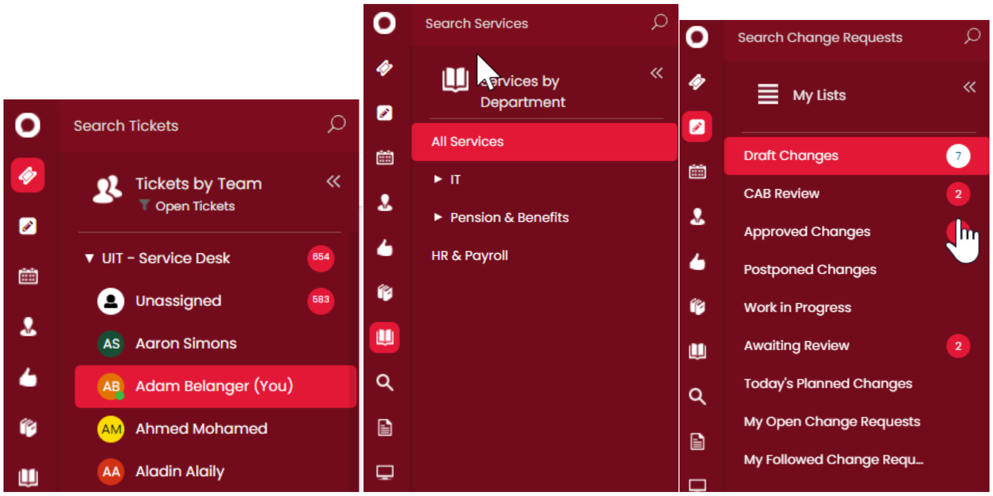


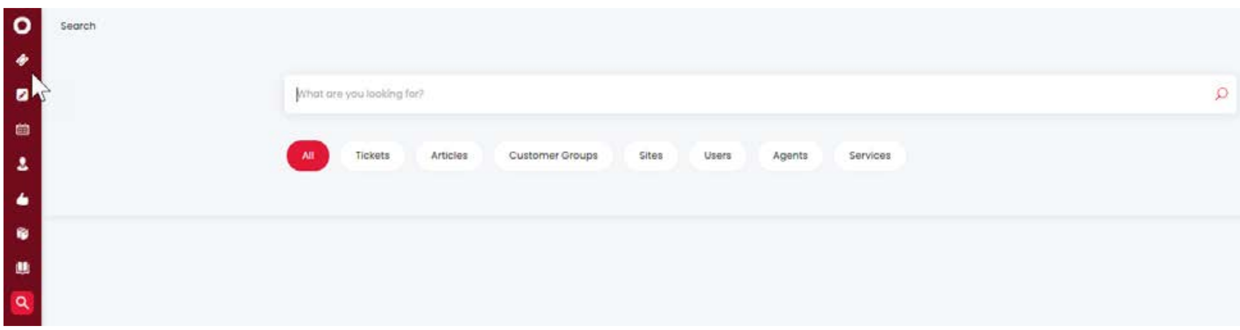

7. **Search Bar**



a. As well as having a search bar on the main dashboard, you also have the search function in each of the section within your Navigation pane at the top

b. There are multiple different ways to search for what you are looking for in HaloITSM

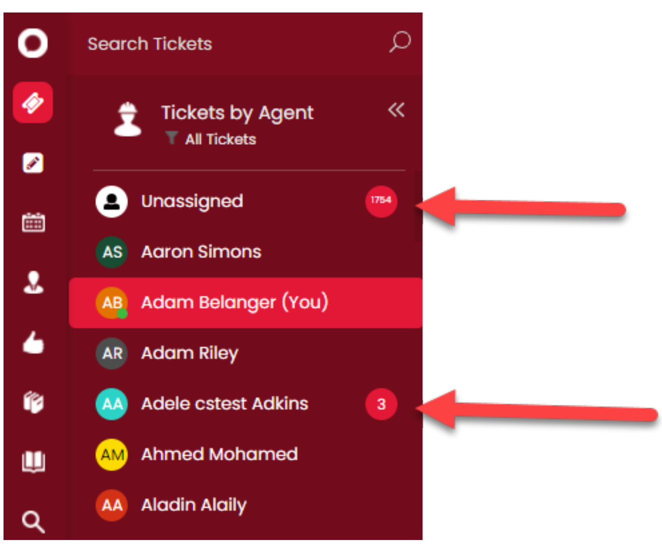


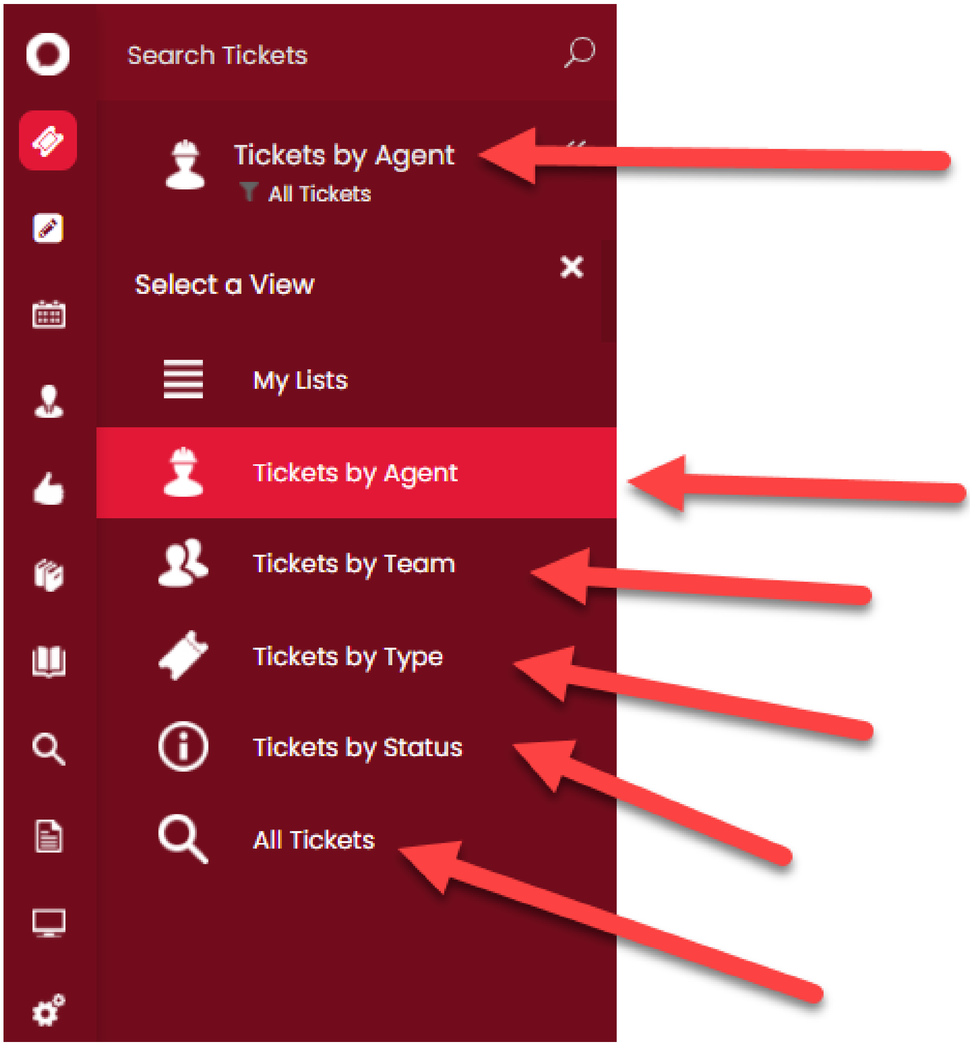

## Lesson 2

**1. Locate a list of assigned and unassigned tickets**

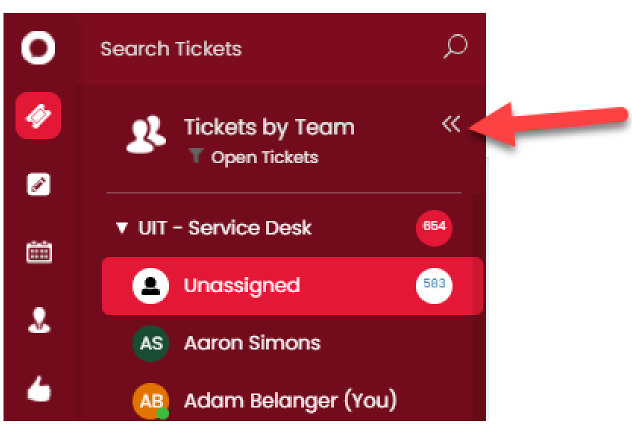
a. Below you can see tickets assigned to individuals or right at the top unassigned tickets



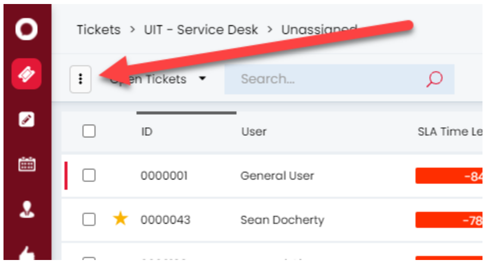
2. **Locate a list of tickets assigned to a specific group or individual**
    a. Below you can see that by clicking on the top level, you can then filter your list by Agent, Team, Type, Status, All Tickets – or you can create a custom filter.



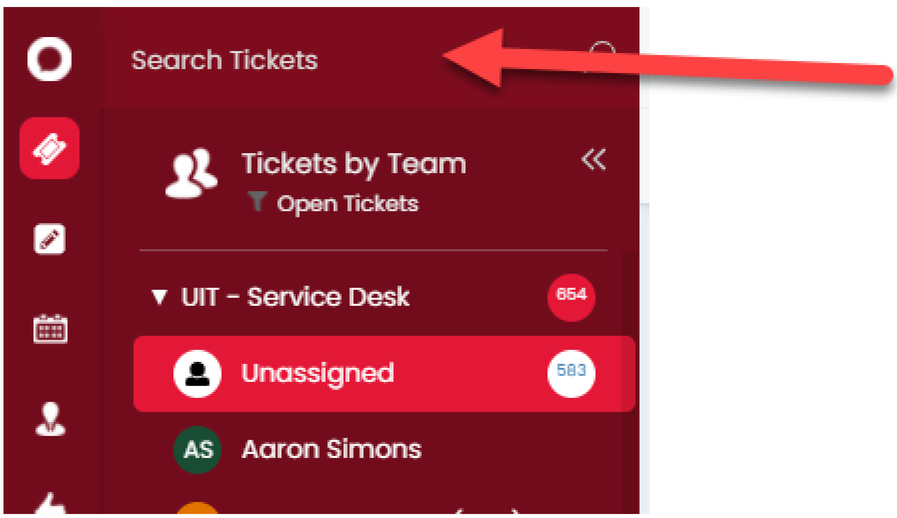

3. **Hide or unhide the ticket pop-up menu**



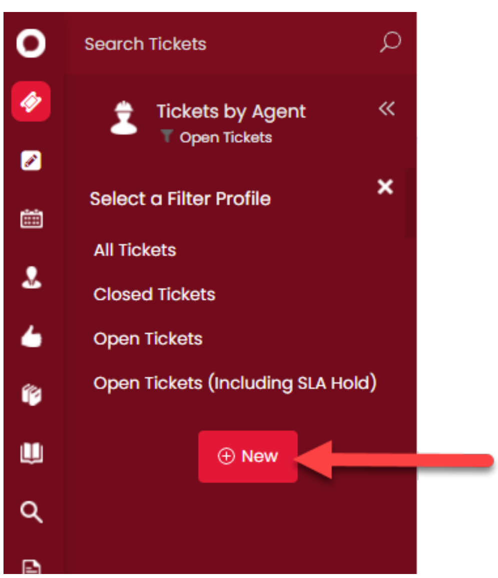
a. Use the double << in the top picture to hide the ticket pop-up menu
b. Use the ellipsis in the picture below to show the ticket pop-up menu again

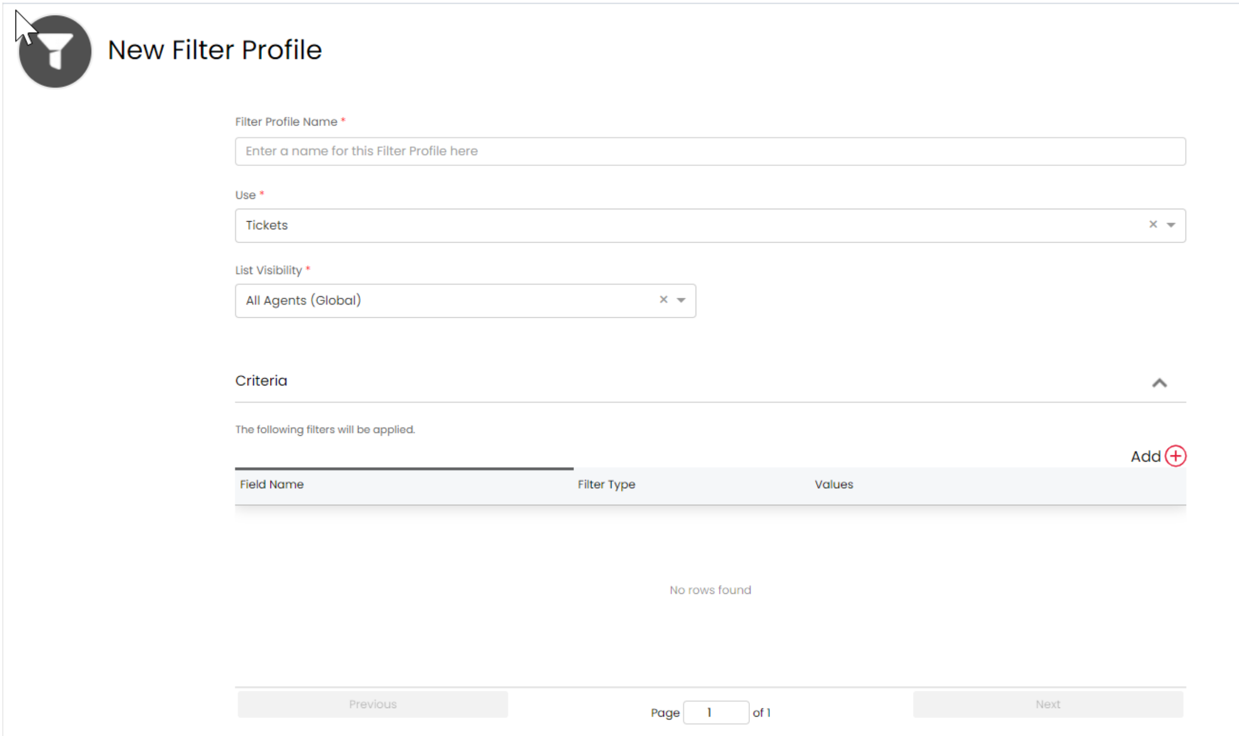



## 4. Ad hoc search for selected tickets

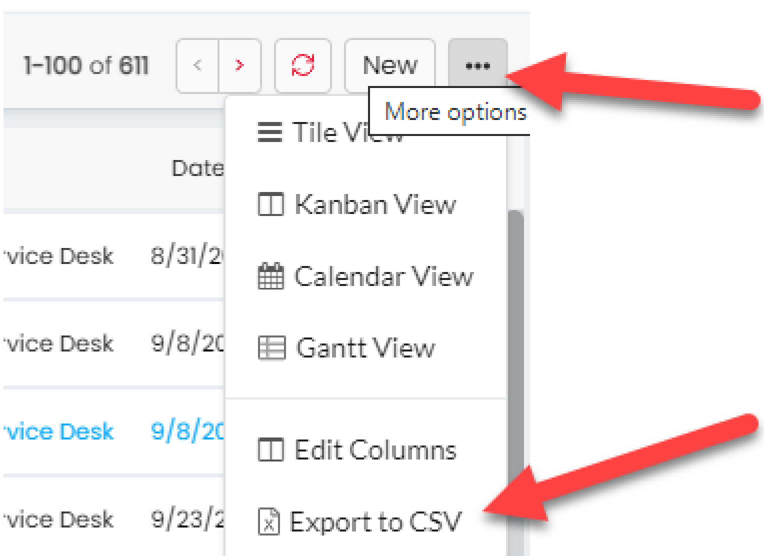



## 5. Customize search

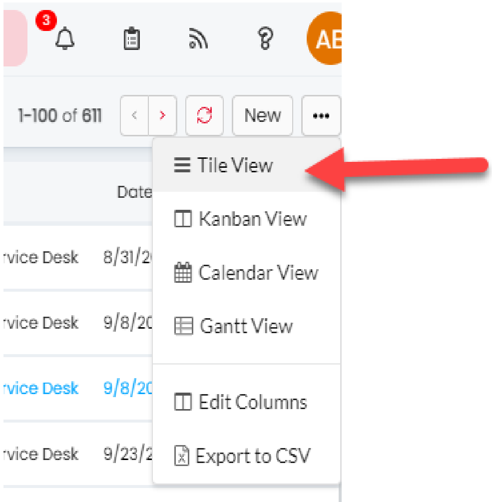


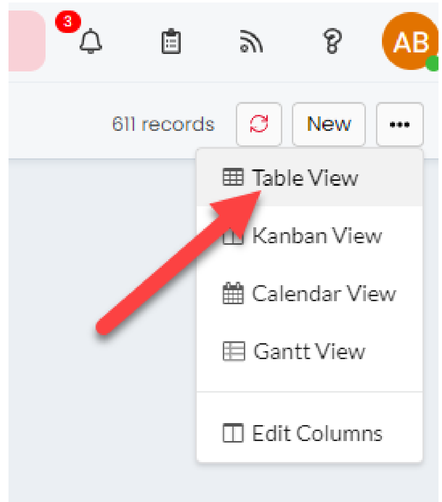



6. **Export a search list to CSV**

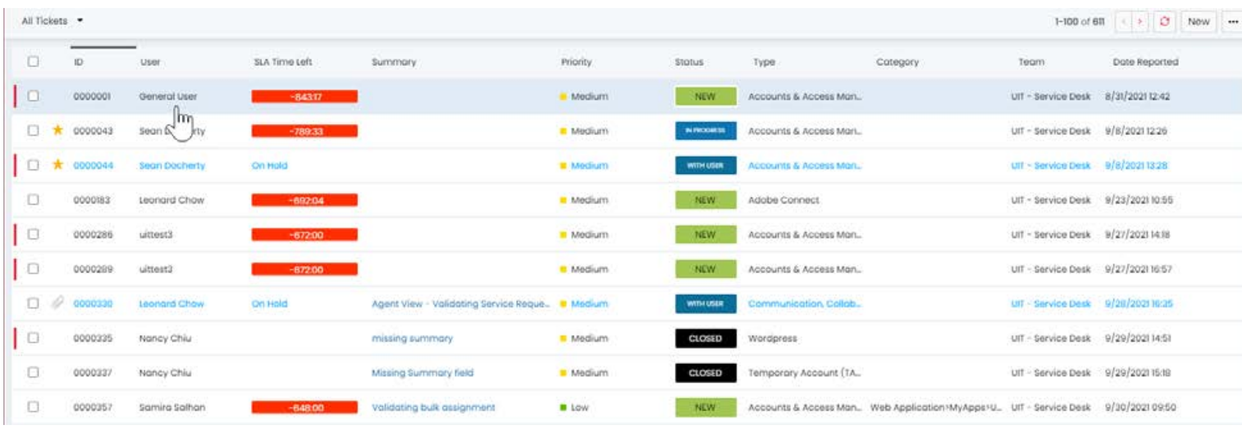



7. **Change between table and tile view**
    a. When you click "Tile View" it changes to "Table view" and vice versa

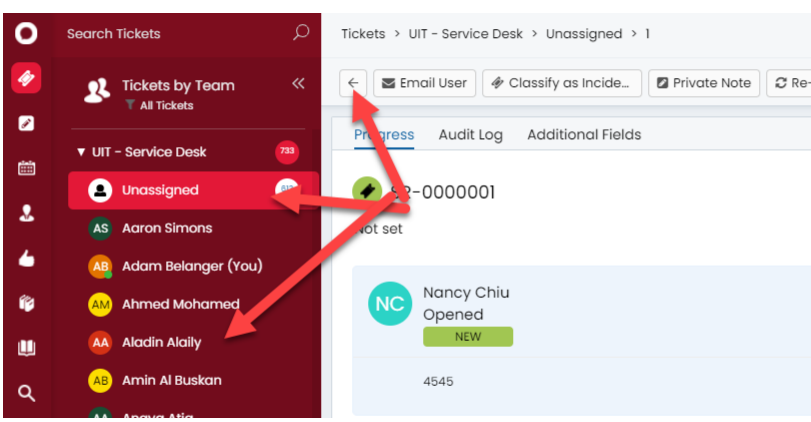




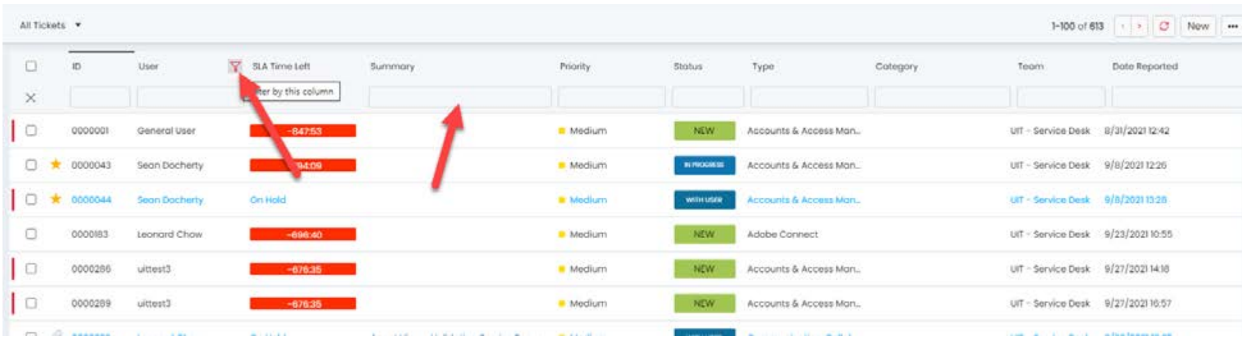

8. **Open a ticket to view its information**
    a. Simply click on any of the tickets in the list

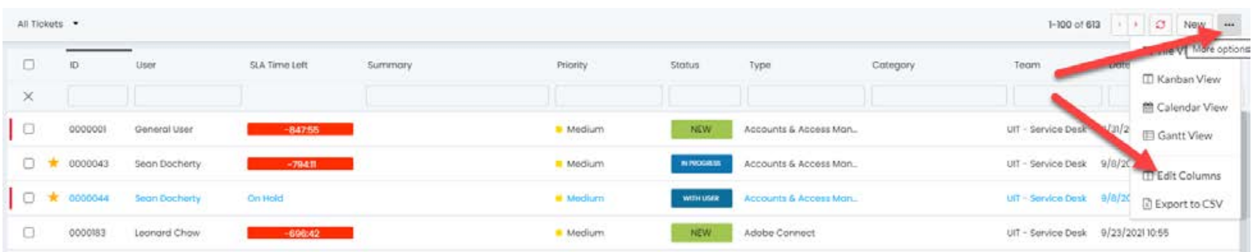


9. **Navigate back to the search list results after a ticket has been selected:**
    a. You can either on any of the queries on the left or use the back arrow, both illustrated below:

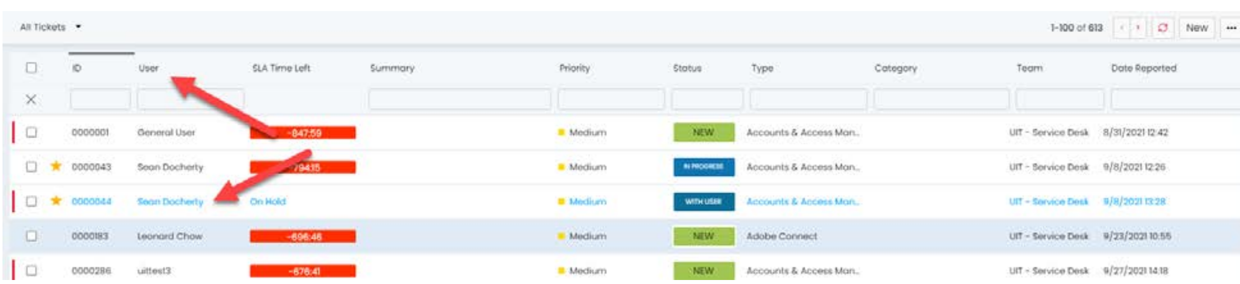


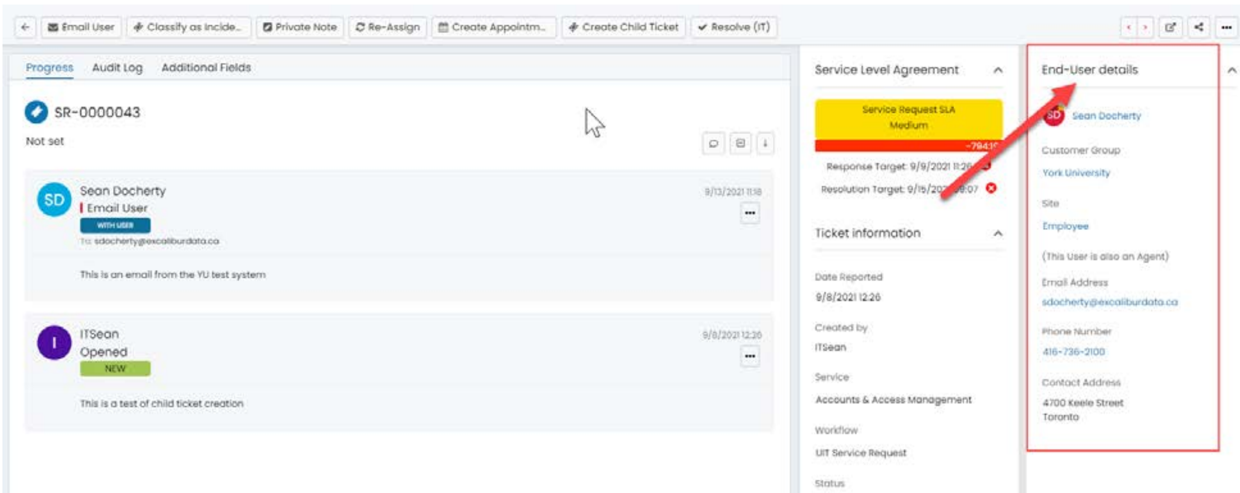
10. **Navigate between ticket details from a search results list**
    a. There are multiple ways to see the details from a search results list, each of the columns can be filtered, you can type details into each of the column header areas, or you can even edit the columns of data to display custom filters to display the details you want to see.





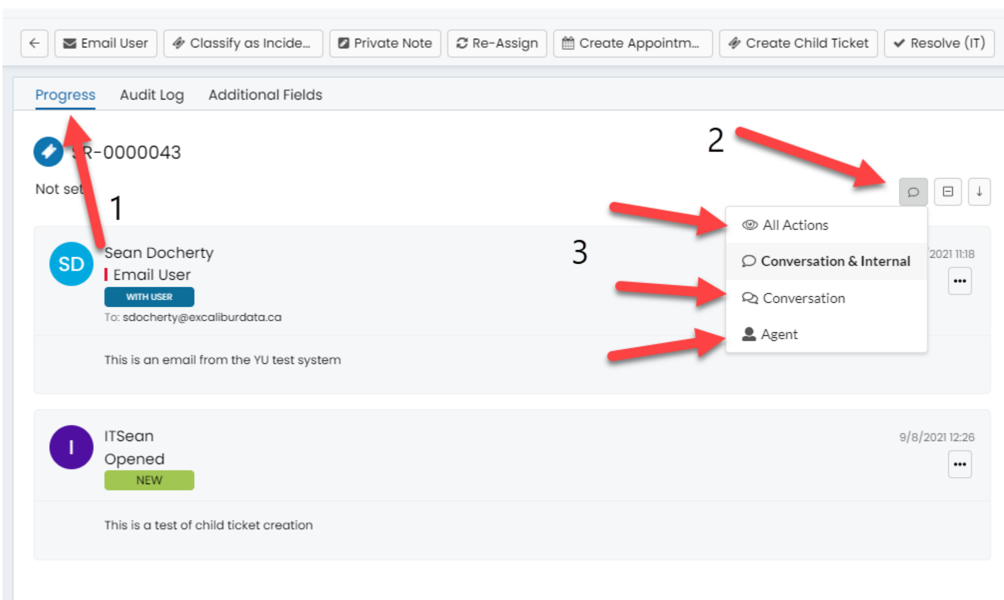
11. **Find user details within a ticket**
    a. User details can be found within the search details, and they can be found within a ticket within the following location.



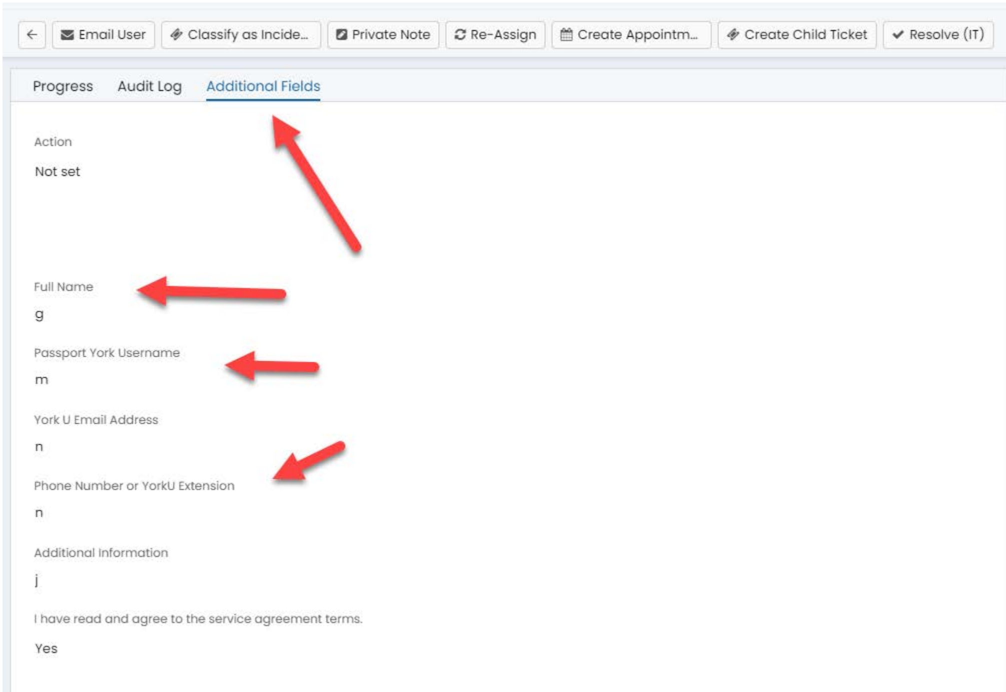



**12. Filter the progress stream on a ticket by agent, actions, and conversations:**

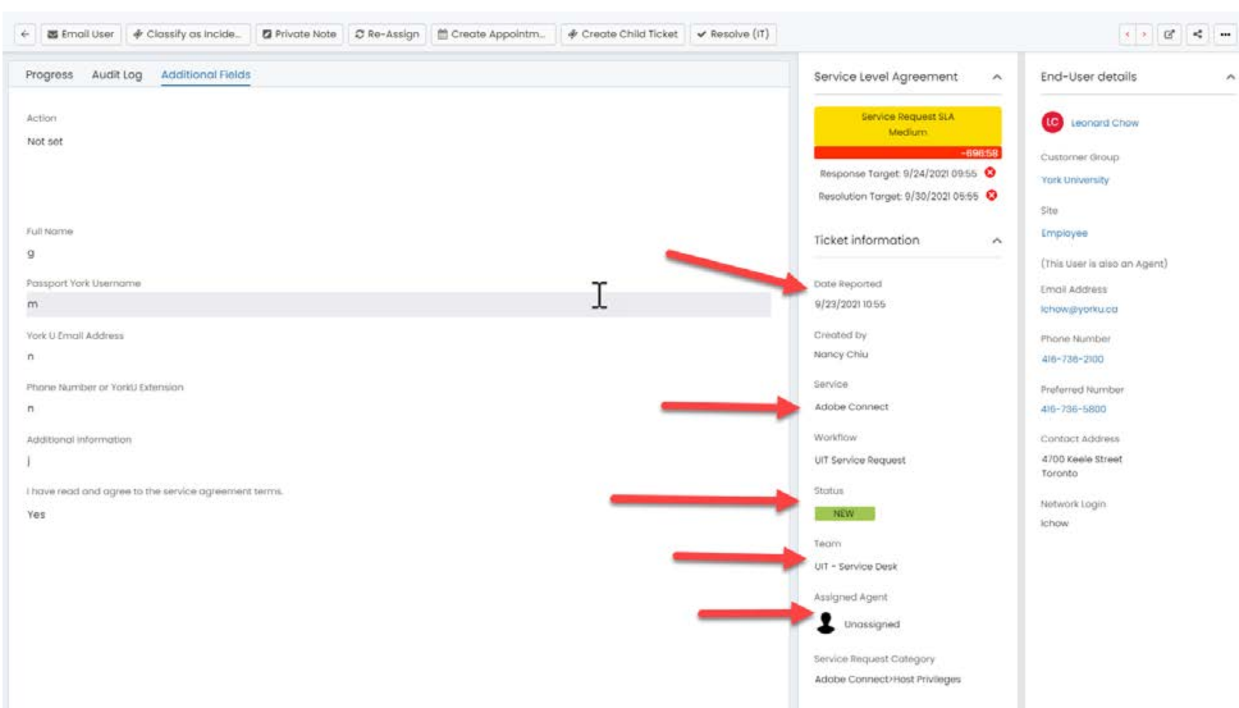
a. Below are steps to filter the progress stream:



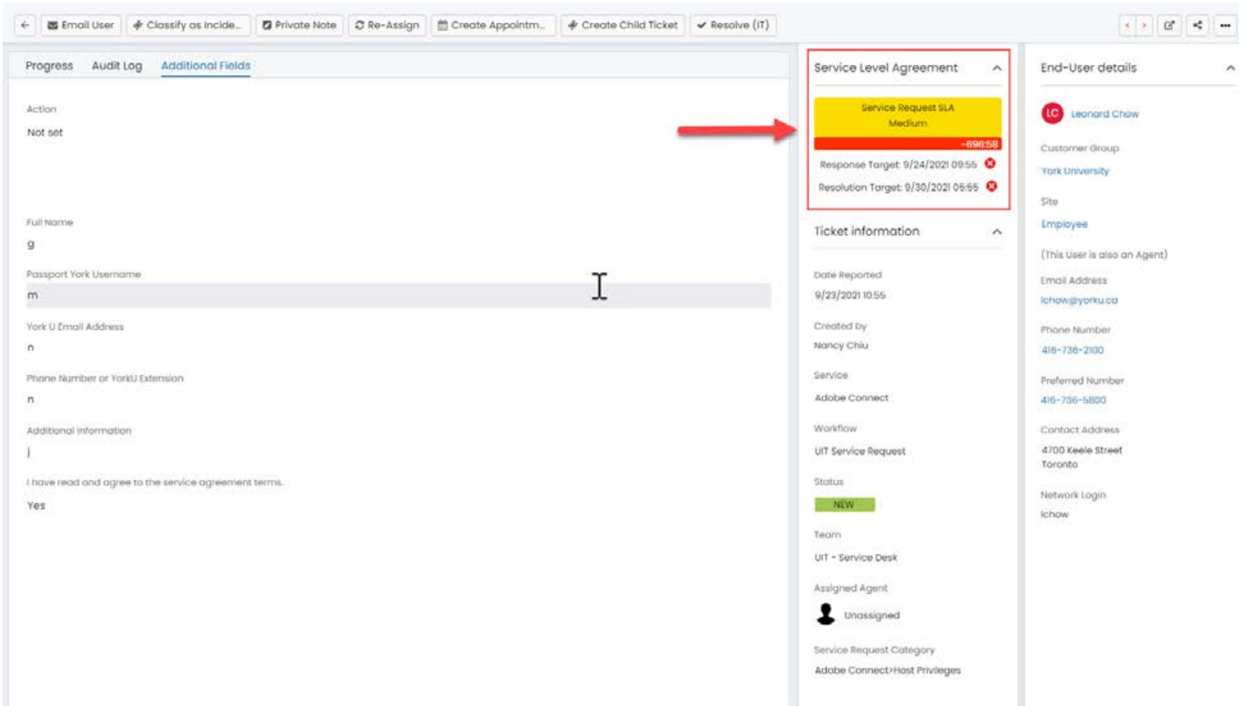

**13. View additional fields captured for the selected tickets:**




**14. View ticket information such as status, assigned team and agent, service classification and date the ticket was logged**

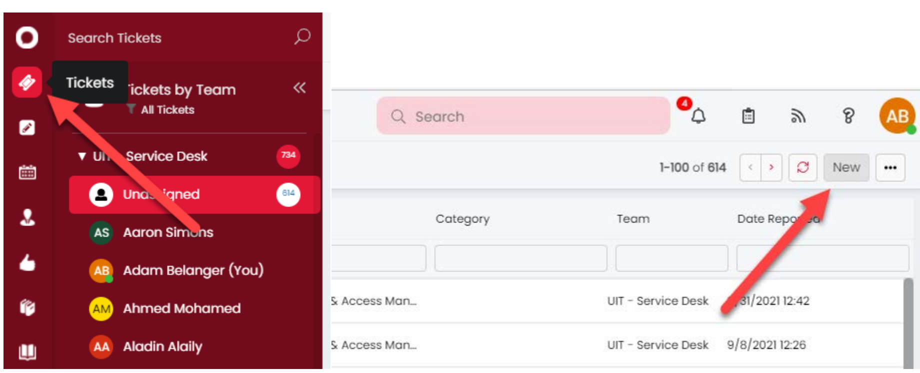


15. **View SLA information related to the ticket**

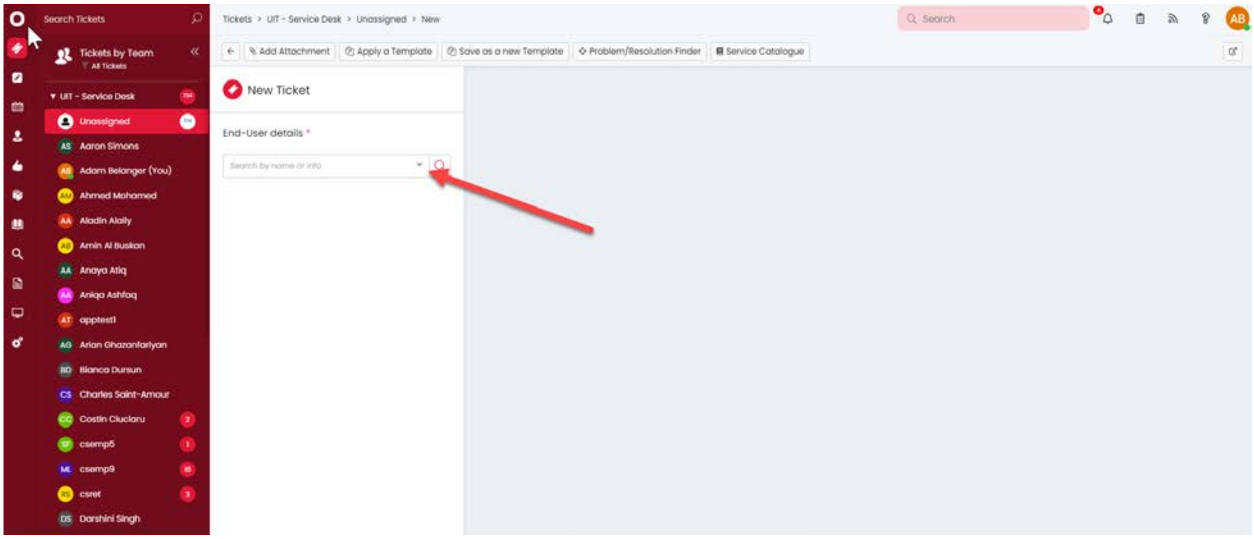



# Lesson 3

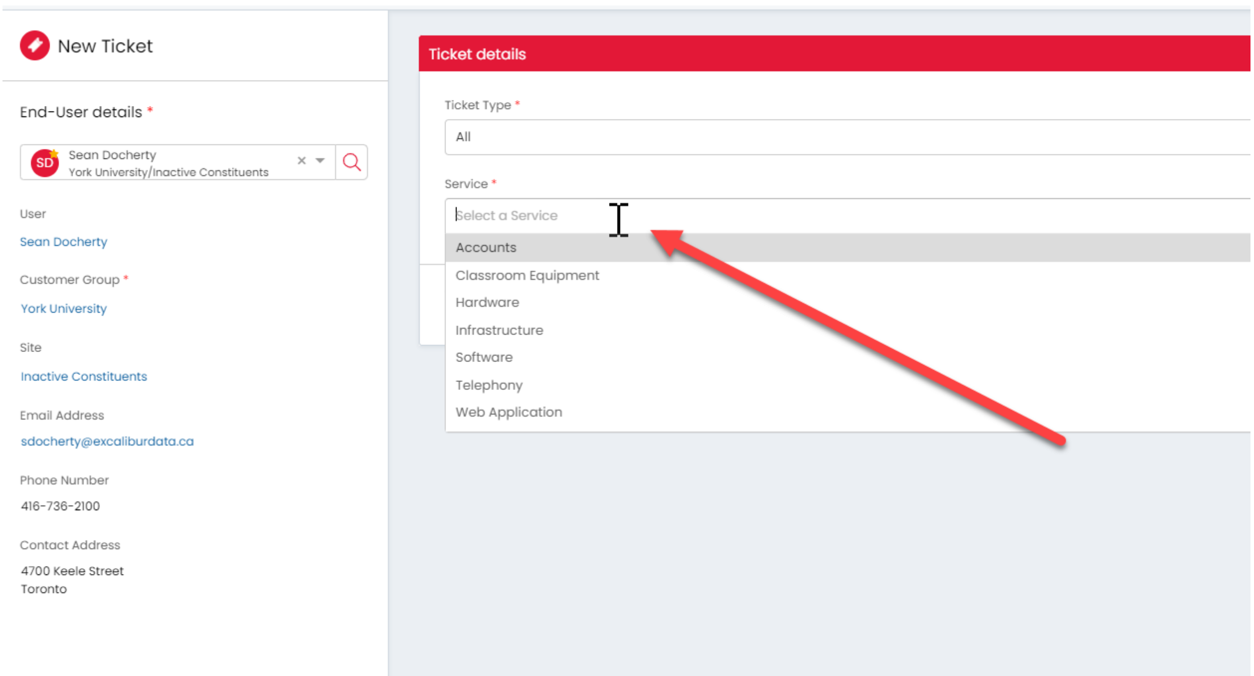
1. **Log a new ticket from within the platform**
   a. From the tickets section of the navigation pane, select “New” on the top right of the screen



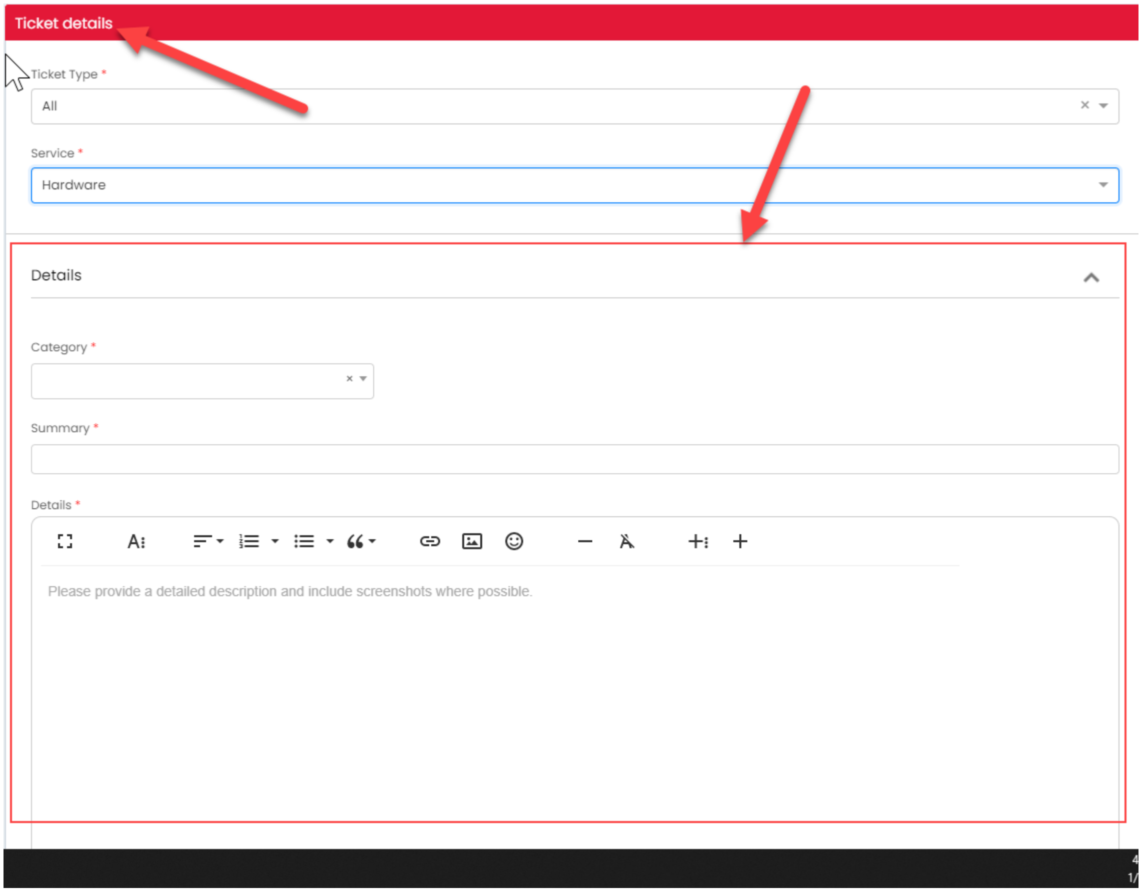

   b. **Next you need to enter the End-User details;** who is submitting or logging the request.



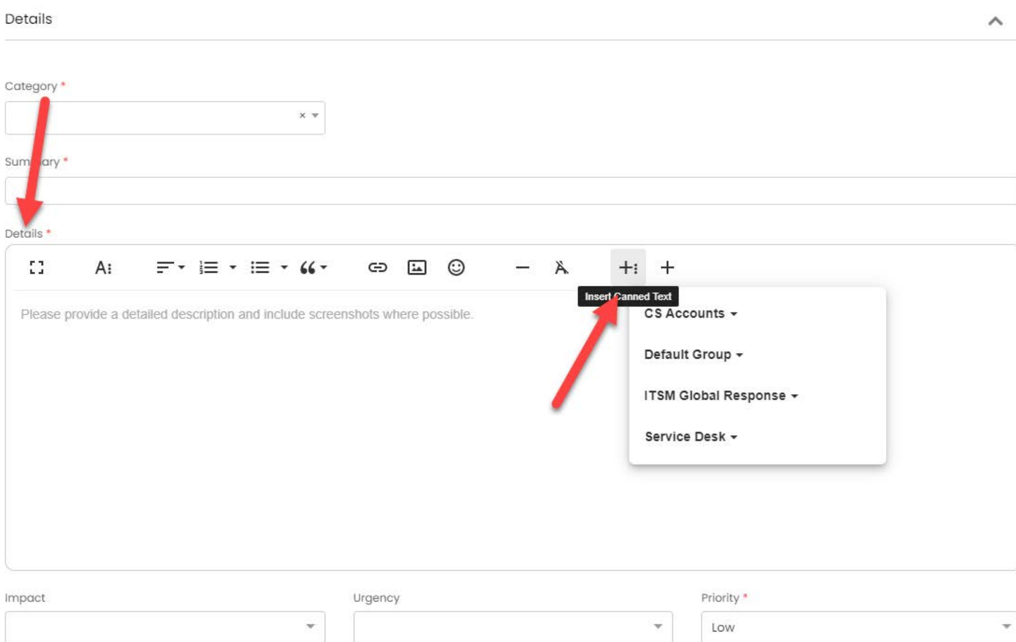

c. **Classify the new ticket using the service catalog**; this allows you to indicate why type of service or assistance you require.



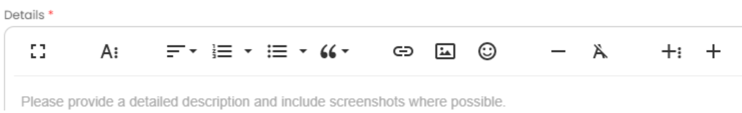

d. **Provide a summary and details for the ticket being raised**; summary is just a brief description of the request or issue; (*ie: I need a new keyboard, Issue with my printer, Can you please modify this document*), details are all the details someone would require to complete your request.




e. **Apply canned text to a ticket's details**; Canned text messages enable you to quickly answer common demands or usually repetitive questions from your customers with a standard reply very quickly.

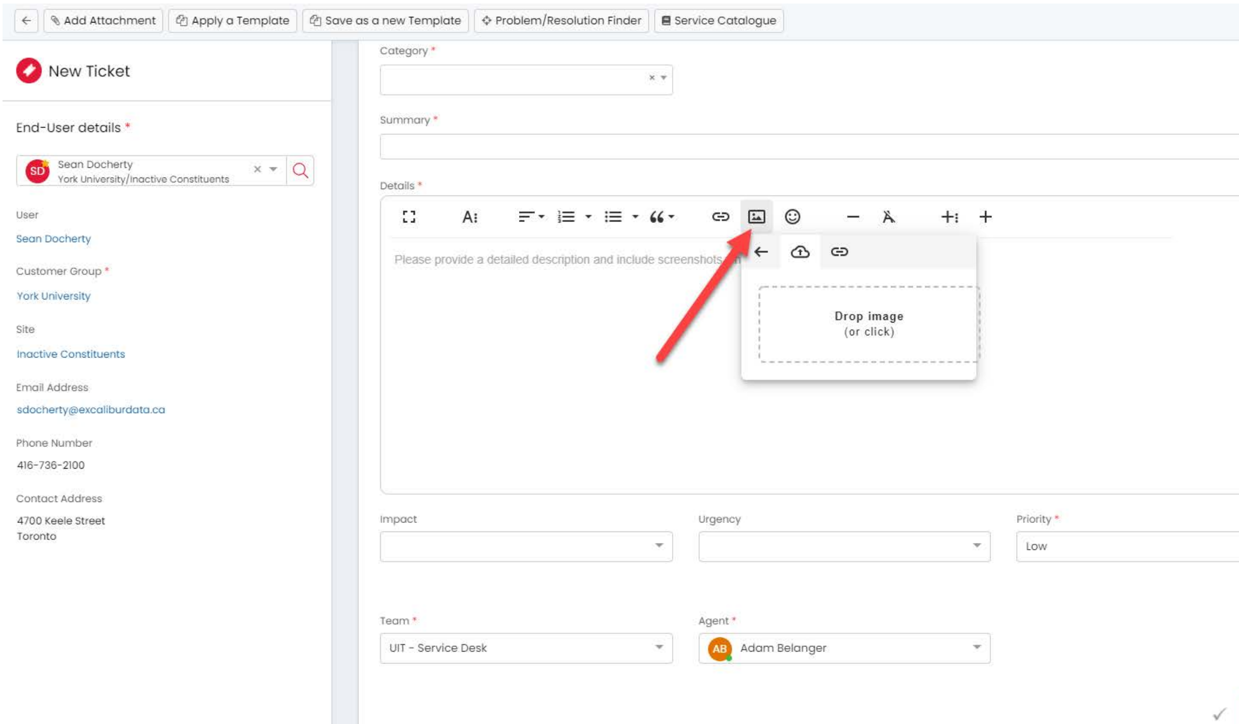



**f. Identify and be familiar with the various options within the ticket details menu**



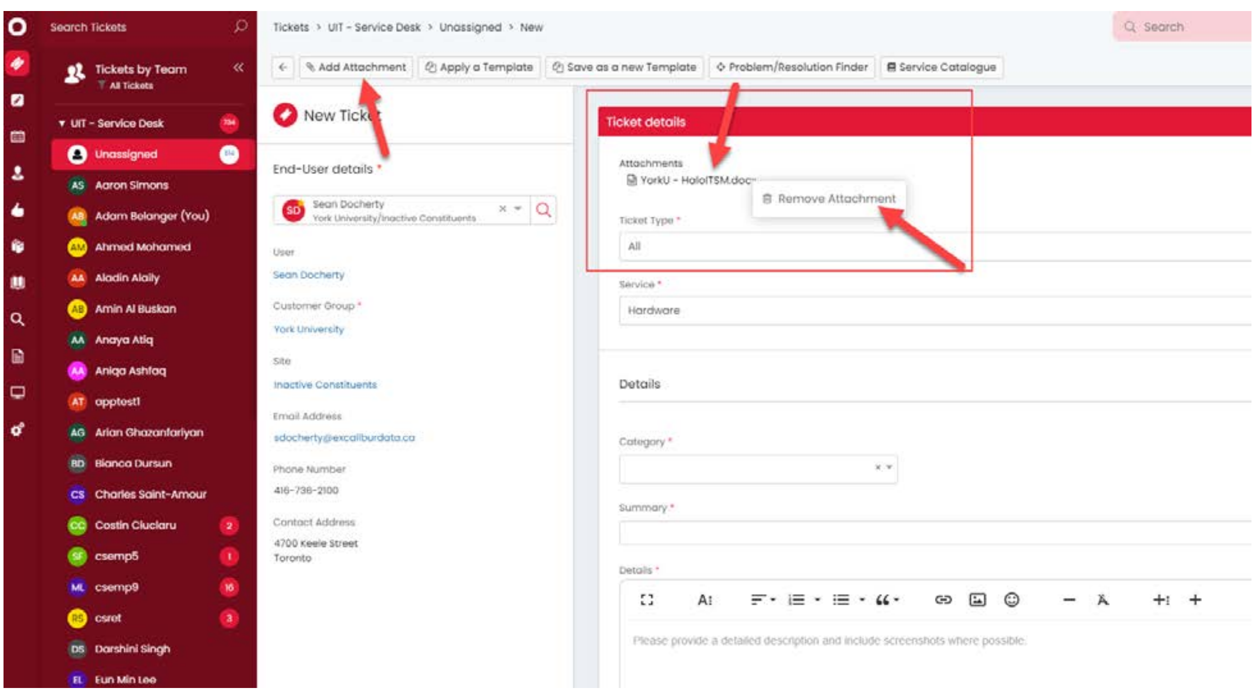

**g. Insert screenshots within the ticket details**

- You can either take a screen shot using a 3rd party application like Snag-it or Snipe-it and paste it into the details box or you can use the “Insert Image” option to add a screenshot that has been saved to your computer.



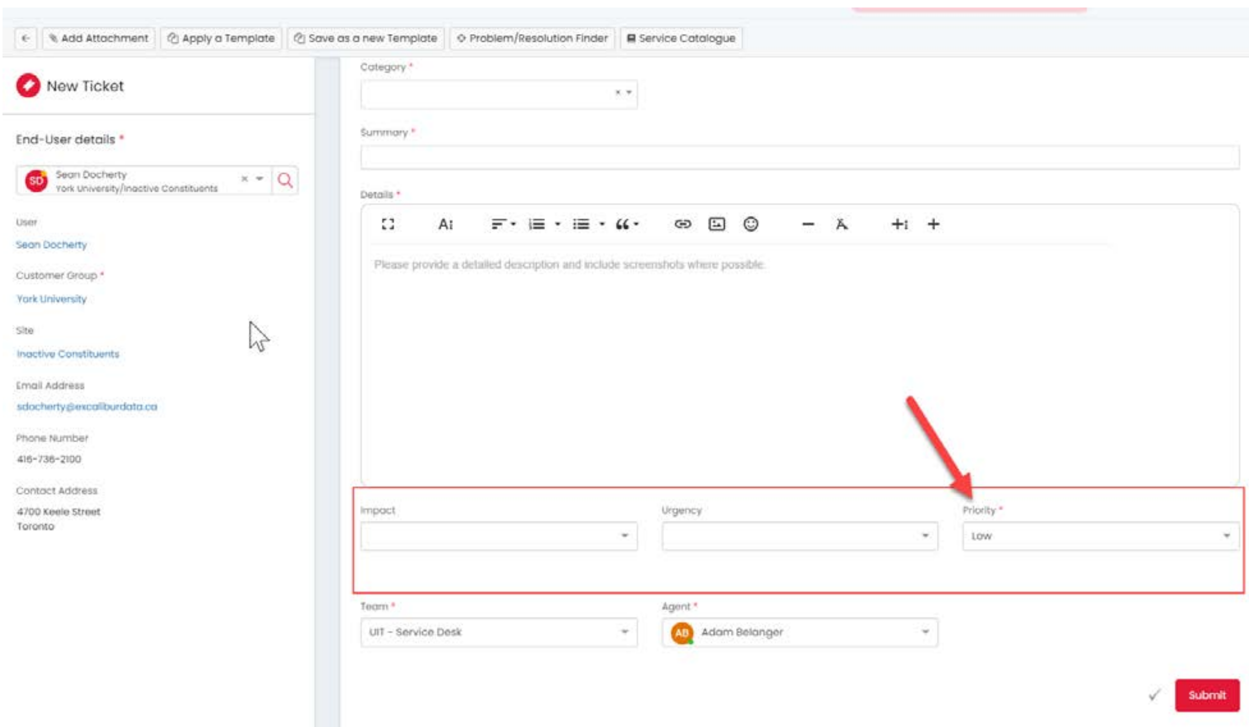

h. **Attach a file to a ticket**

- The attachments will show in the attachment area shown below. To open the attachment, simply click on it. To remove the attachment, right click and select "Remove Attachment". You can also drag and drop an attachment within the ticket from your computer.

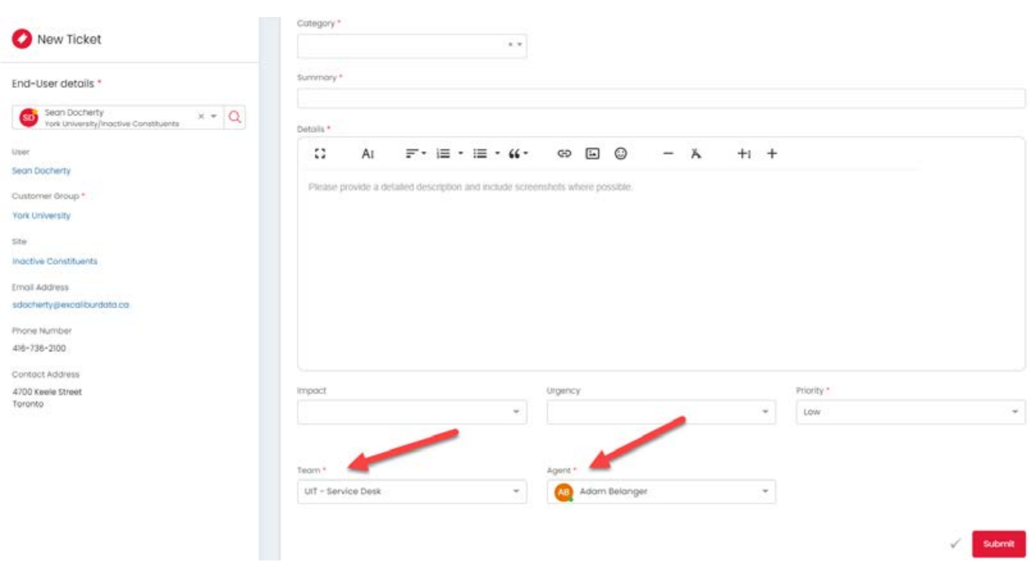


**i. Prioritize a ticket**

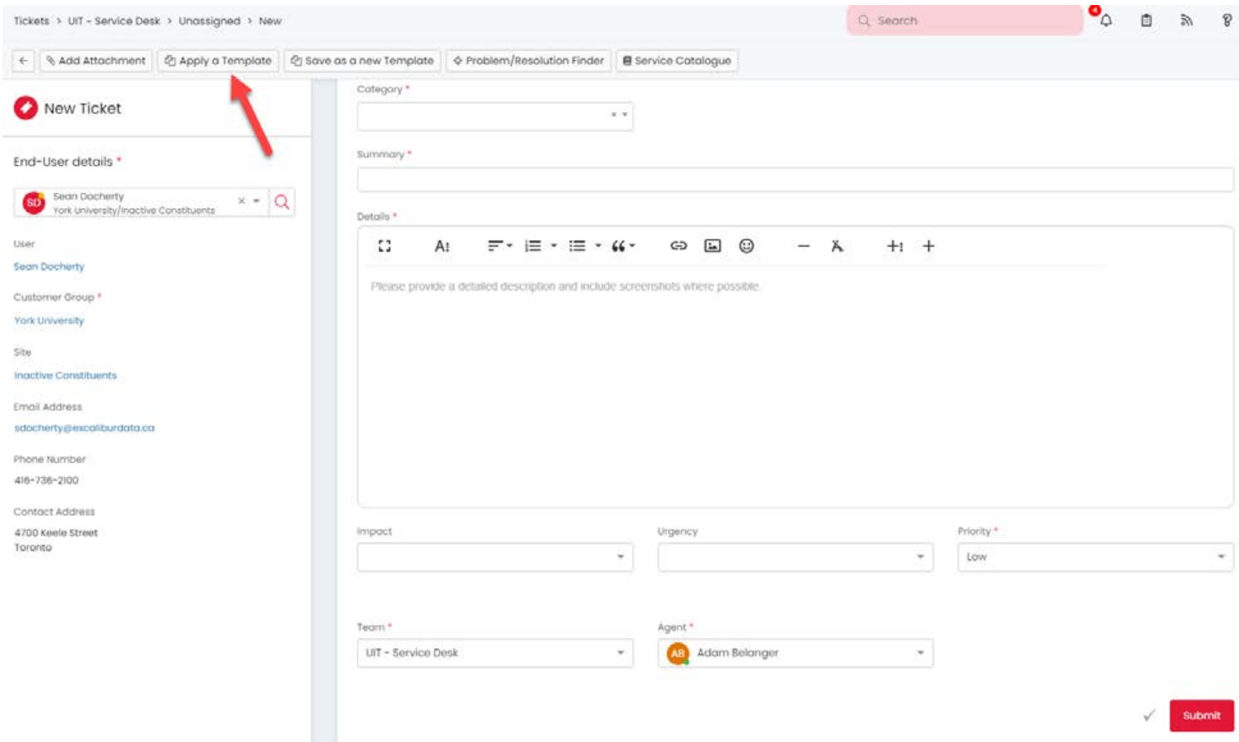
- Here you can prioritize a ticket and set the Impact and Urgency, however Impact and Urgency are not required for save. The various priorities that are available to select are: Very Low, Low, Medium, High, Critical




**j. Assign the ticket to a particular team or individual within a team**

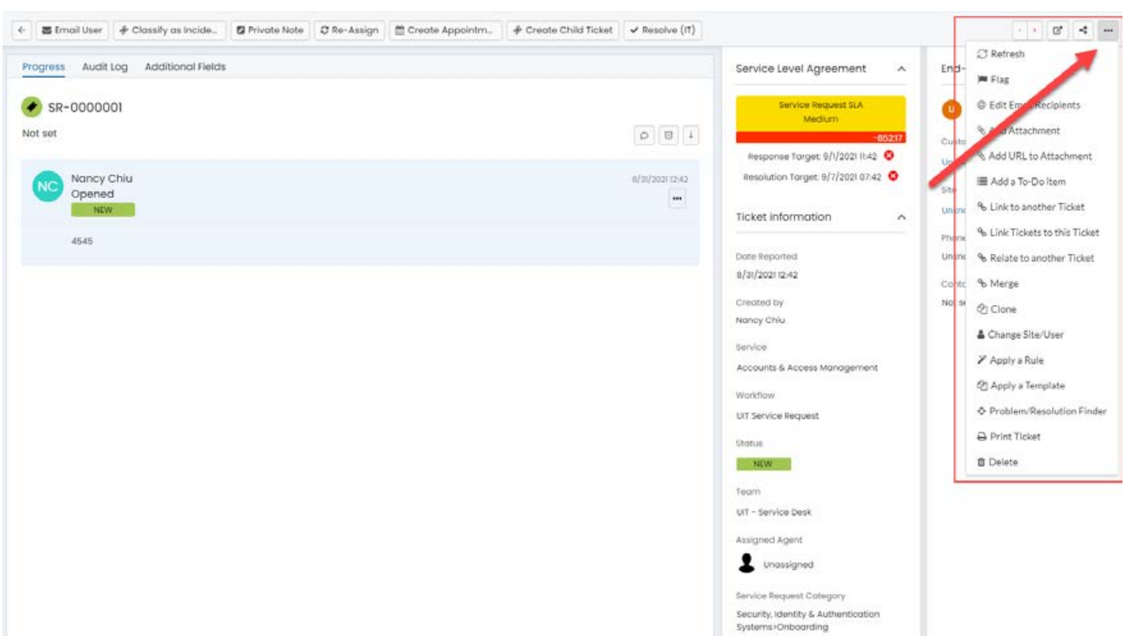


k. **Apply a ticket template to a new ticket**; ticket templates are used to prepopulate certain fields within a ticket for repetitive types of ticket creation.

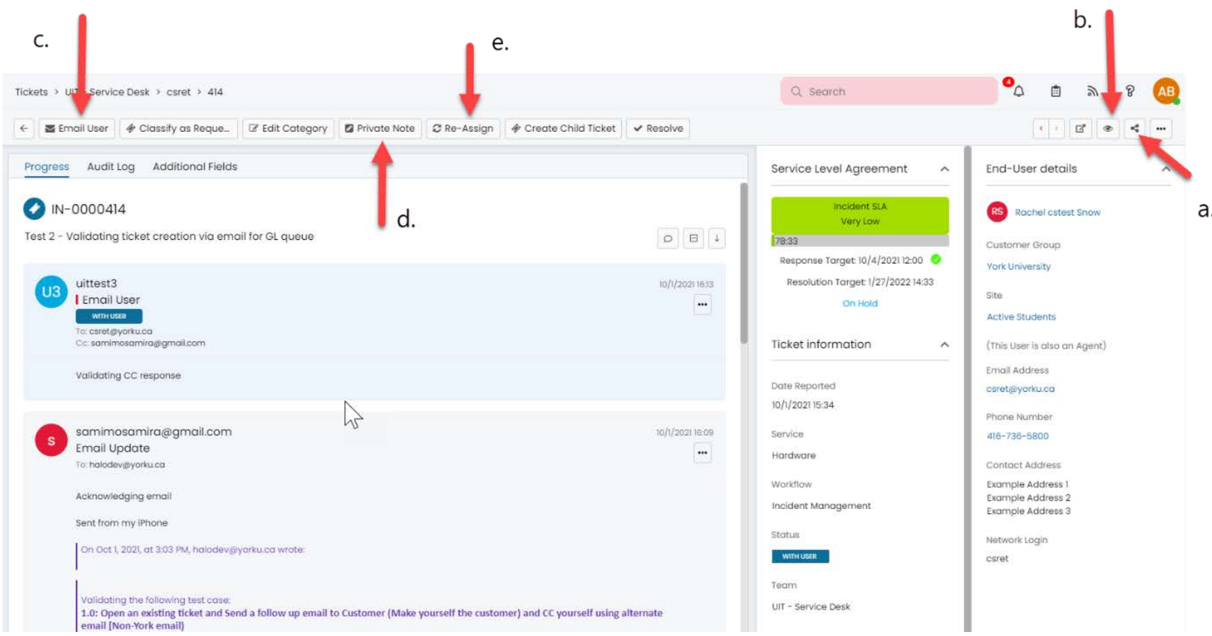



## Lesson 4

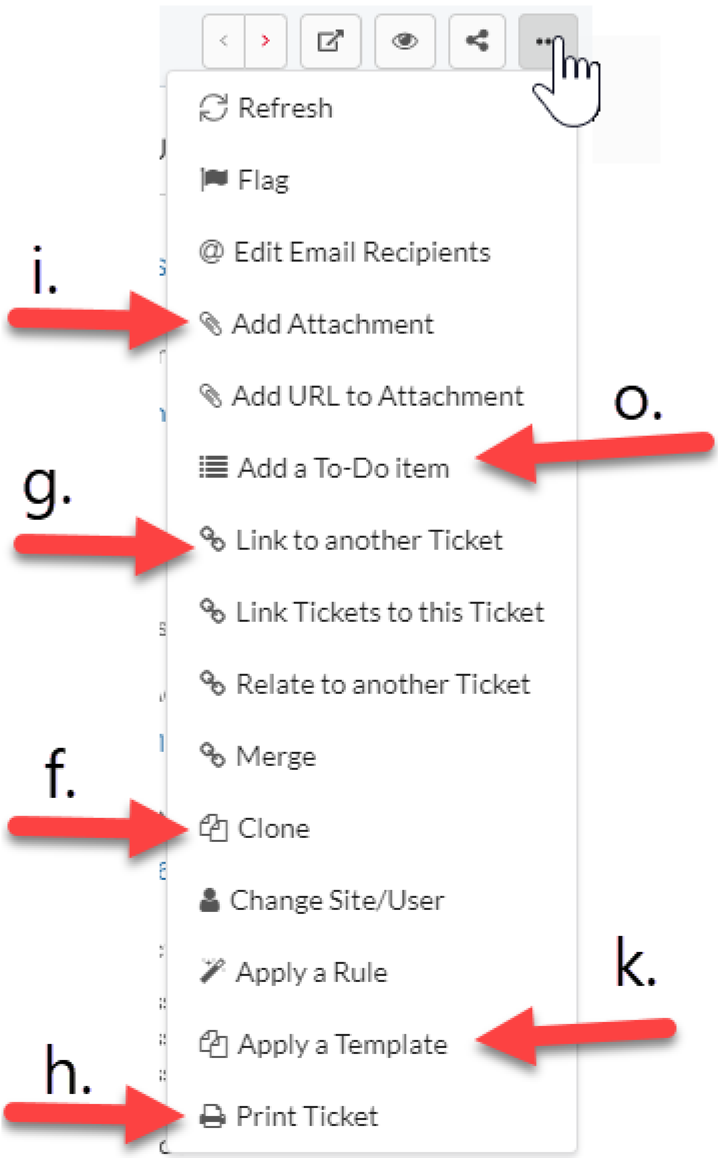
**1. Locate within the ticket the action items menu**



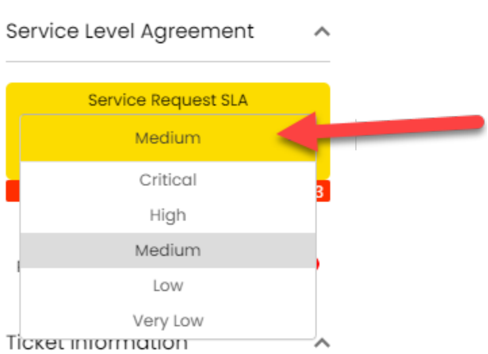
a. **Share a ticket**; allows you to copy a link and share this ticket to be shared with others
b. **Follow a ticket**; this will allow you to follow this ticket and receive updates as the ticket progresses
c. **Email a user from a ticket**; allows you to email the end-user with details from the ticket
d. **Create a private note within a ticket**; allows you to create a private note with a ticket that is only visible internally and the end-user does not see these details
e. **Reassign a ticket to another team**; allows you to assign the ticket to another team internally

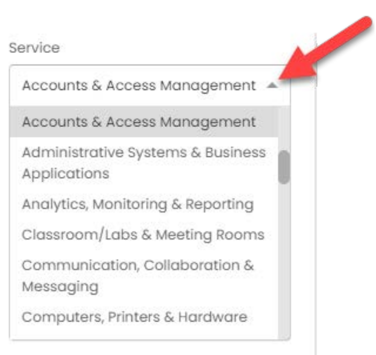



f. **Clone a ticket**; This allows you to take the information from your current ticket and make a copy “clone” all the details if multiple people are having the same issue or logging the same request.
g. **Link a ticket to another ticket**; if there is already another ticket logged related to your request, you can link your ticket to that other ticket.
h. **Print a ticket**; allows you to print out the details of your ticket for review.
i. **Add attachments to an existing ticket**; allows you to add additional notes and documents to your ticket as an attachment.

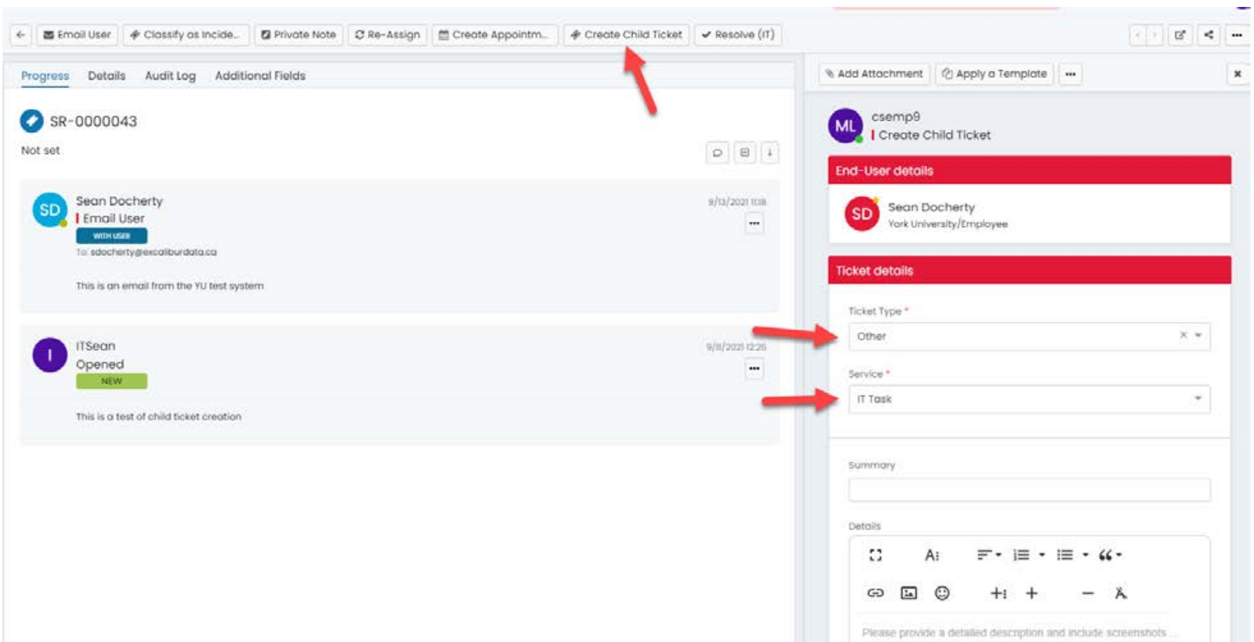



j. **Modify ticket details such as classification or priority**; this allows you to update and change both the classification and priority of the ticket.

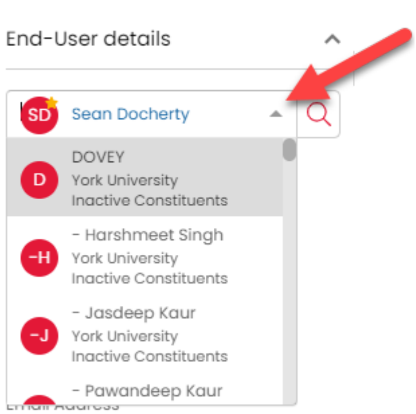


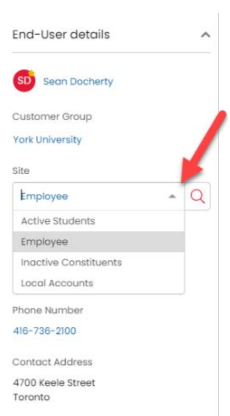



k. **Apply a ticket template to an existing ticket**; templates are preconfigured sets of information and details that can be quickly added to your ticket, typically used for repetitive types of tickets.
l. **Unlink a ticket from another ticket**; when a ticket is already linked to another ticket, the option "Link to another ticket" will automatically change to "Unlink from another ticket"
m. **Create a child ticket from within a ticket**; on the menu bar, you have the option to create different types of child tickets, one of those examples is a task.
n. **Create a task from within a ticket**; allows you to add additional tasks associated with a ticket that can be assigned to different teams or individuals.



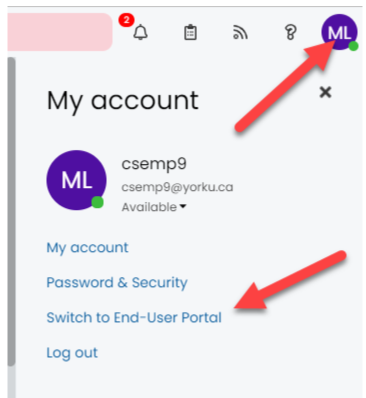

o. **Add a To-Do list to a ticket**; allows you to add a list of tasks as a reminder "to-do" that must be reviewed and completed to finalize a particular request.
p. **Resolve a ticket**; allows to you indicate that the work has been completed, however, the ticket can then be re-opened later if certain details are missing.
q. **Change the site or user associated to a ticket**; allows you to update the site or the user associated with a particular ticket.



## Lesson 5

a. **Submit a request via the online forms**; go to the following URL: https://yorku.haloitsm.com/portal/home and login.
b. **Access the online forms from the HaloITSM platform**; you can either go directly to the URL: https://yorku.haloitsm.com/portal/home or from within the client, click in the upper right corner of the screen, and select “Switch to End-User Portal”.



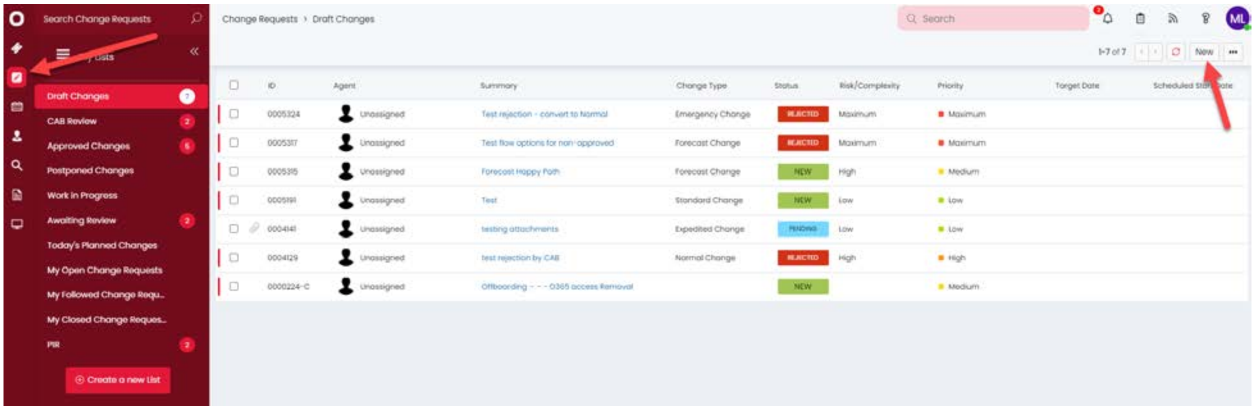

## Lesson 6

a. **Access reports built within the platform**;
b. **Copy a report and save it**;
c. **Modify a saved report**;
d. **Filter a report**;
e. **Access the report repository and add a report to the platform**;
f. **Access dashboards within the platform**;
g. **Filter information within reports and dashboards**;

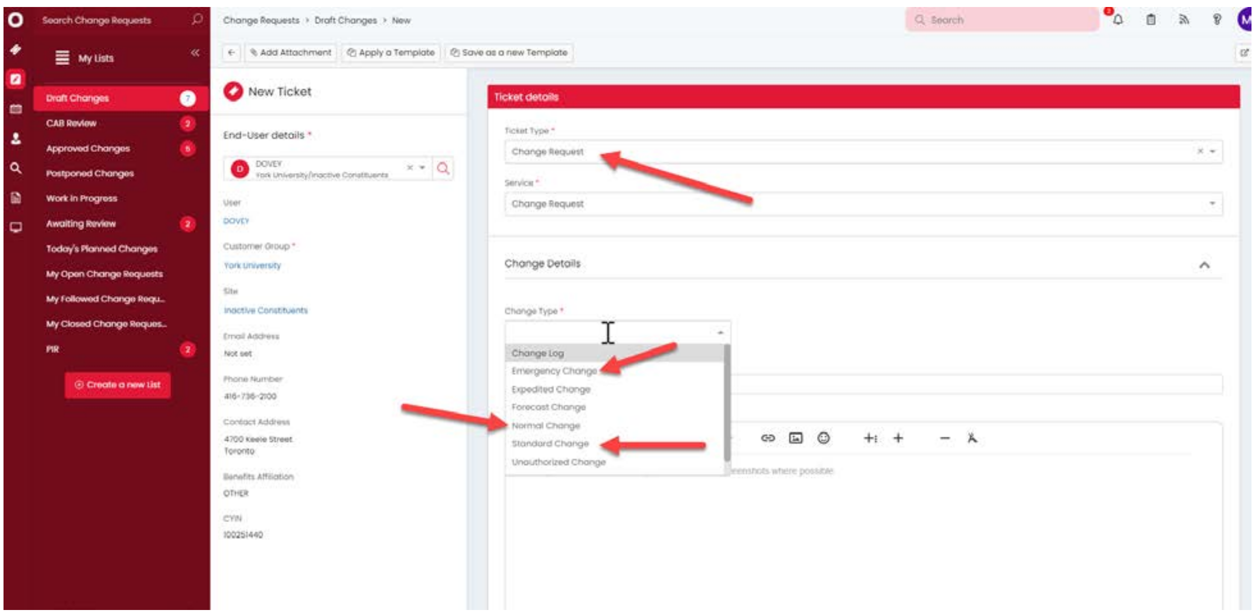
## Lesson 7

a. **Create a standard change ticket**; see diagram below
b. **Create a normal change ticket**; see diagram below
c. **Create an emergency change ticket**; see diagram below

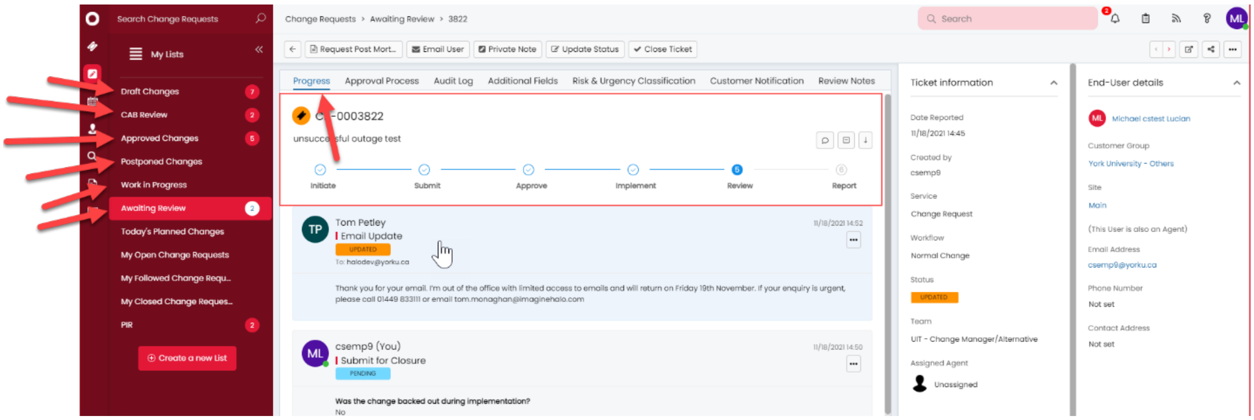
(Items “a. b. c.”) Click on the Change Request button from the navigation menu. Click “New” on the upper right side of your screen.



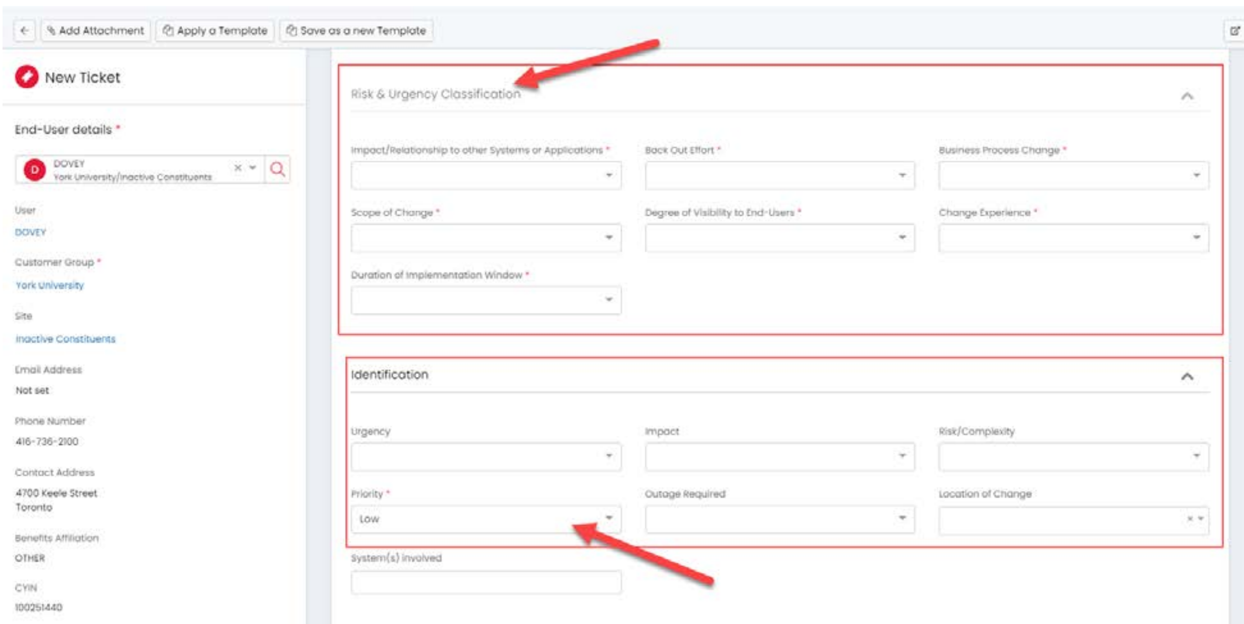

Below you are presented with the Change Request screen, with each of the "Change Types" (Standard, Normal, Emergency) among others.



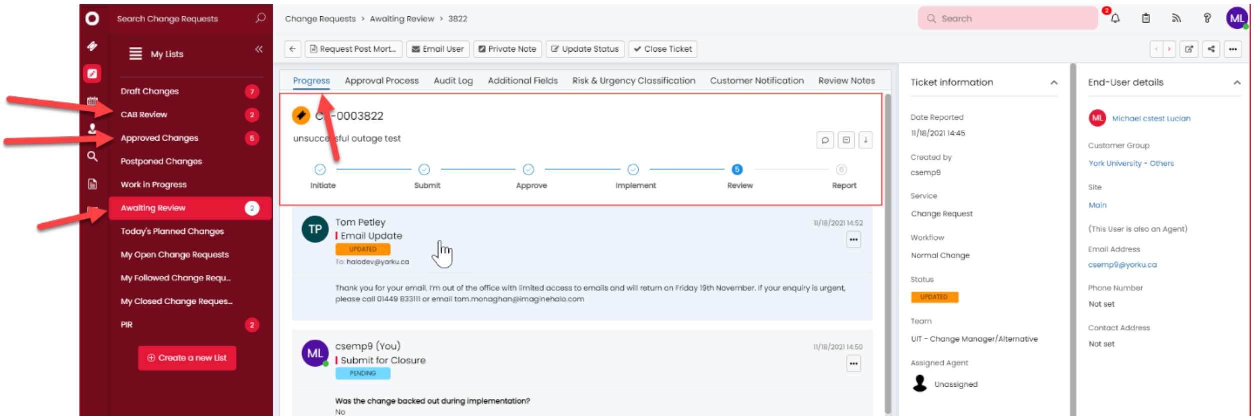

d. **Identify the status of a change within the change management workflow**; there are a few ways to identify the status of a change, one from the status navigation on the left, or by opening a Change Request and reviewing the "Progress" section (see diagram below).



e. **Prioritize and classify a change ticket**; allows you to set the Priority and also to Classify the details of the Change Request.




f. **Identify the approval status of a ticket**; allows you to determine if a ticket is under review by either the CAB or awaiting other review, as well as allows you to determine if a ticket has already been approved.



Search Change Requests
Change Requests > Awaiting Review > 3822
My Lists
Draft Changes
CAB Review
Approved Changes
Postponed Changes
Work in Progress
Awaiting Review
Today's Planned Changes
My Open Change Requests
My Followed Change Requ...
My Closed Change Reques...
PIR
Create a new List
Request Post Mort...
Email User
Private Note
Update Status
Close Ticket
Progress
Approval Process
Audit Log
Additional Fields
Risk & Urgency Classification
Customer Notification
Review Notes
-0003822
Initiate
Submit
Approve
Implement
Review
Report
Tom Petley
Email Update
UPDATED
To: halodev@yorku.ca
Thank you for your email. I'm out of the office with limited access to emails and will return on Friday 19th November. If your enquiry is urgent, please call 01449 833111 or email tom.monaghan@imaginehalo.com
csemp9 (You)
Submit for Closure
PENDING
Was the change backed out during implementation?
No
Ticket information
Date Reported
11/18/2021 14:45
Created by
csemp9
Service
Change Request
Workflow
Normal Change
Status
UPDATED
Team
UIT - Change Manager/Alternative
Assigned Agent
Unassigned
End-User details
Michael cstest Lucian
Customer Group
York University - Others
Site
Main
(This User is also an Agent)
Email Address
csemp9@yorku.ca
Phone Number
Not set
Contact Address
Not set