



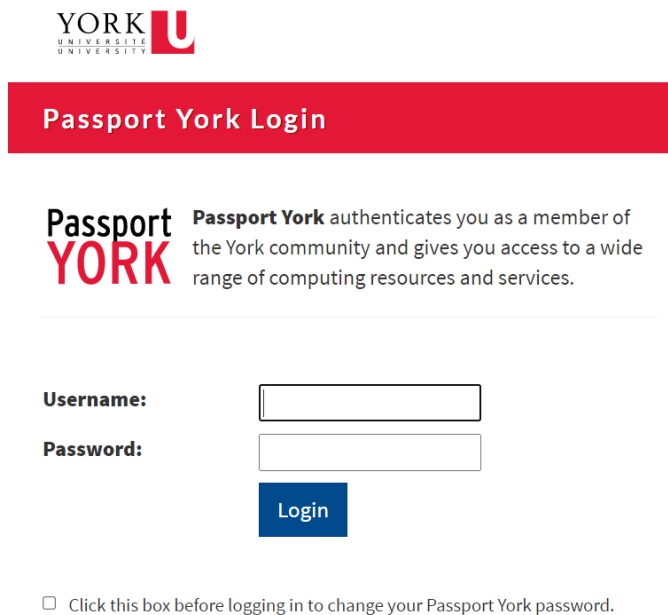
Quick reference guide

IT Training Curriculum

Lesson 1

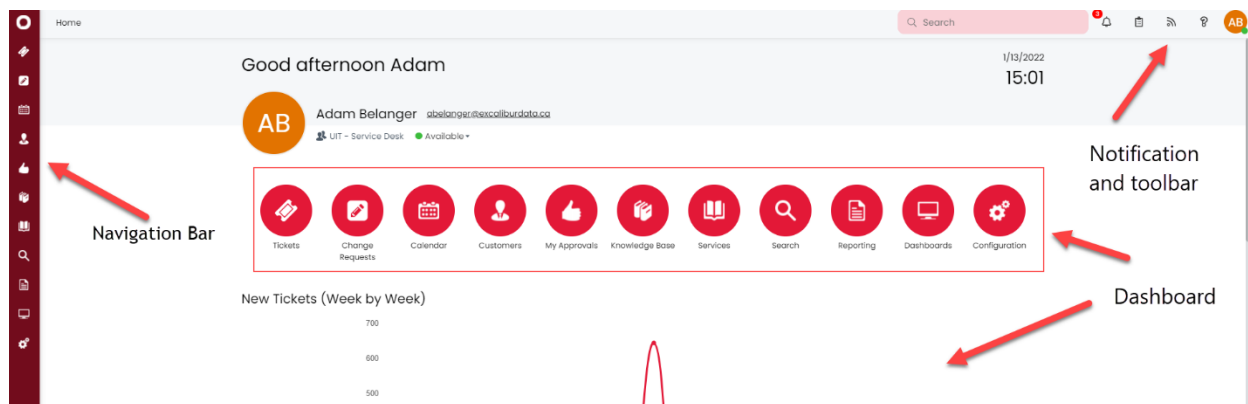
1. Login to HaloITSM

- Go to the following URL: <https://askus.yorku.ca>
- You will be taken to the Passport York login screen where you will have to provide your current credentials (see below)



The image shows the Passport York login interface. At the top left is the York University logo. Below it is a red banner with the text "Passport York Login". The main heading "Passport YORK" is followed by a description: "Passport York authenticates you as a member of the York community and gives you access to a wide range of computing resources and services." Below this is a login form with fields for "Username:" and "Password:", and a blue "Login" button. At the bottom, there is a checkbox with the text "Click this box before logging in to change your Passport York password."

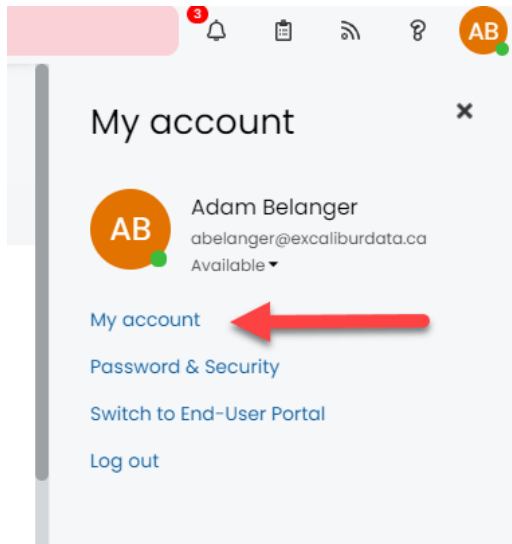
2. Basic structure within the platform



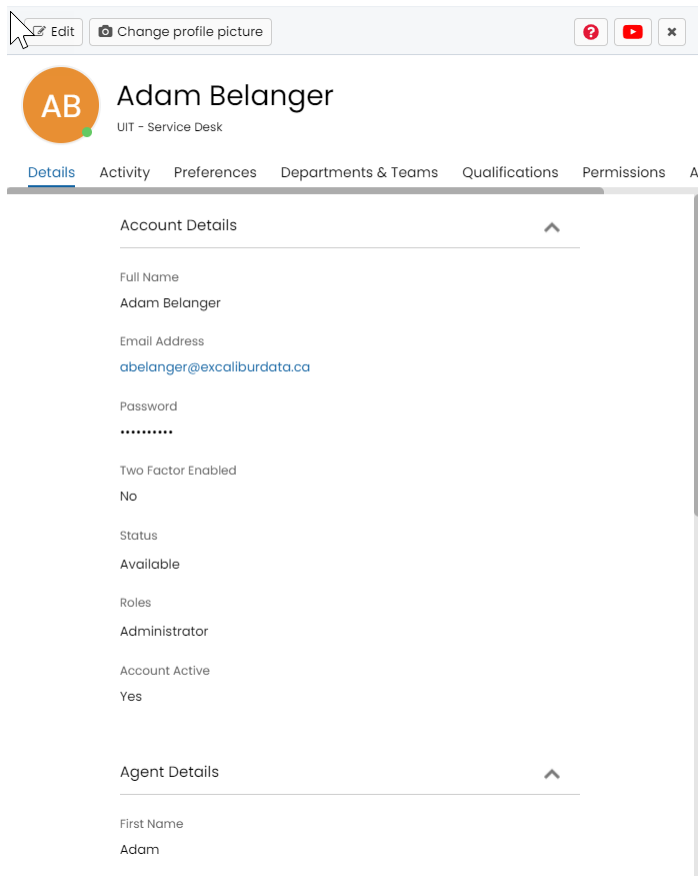
The screenshot displays the HaloITSM dashboard for Adam Belanger. The top navigation bar includes a search field, notification icons, and a user profile icon labeled "AB". The main header shows "Good afternoon Adam" and the date/time "1/13/2022 15:01". Below the header is a user profile card for Adam Belanger (abelanger@escallourdadata.ca) with a "UIT - Service Desk" role and "Available" status. A central row of red circular icons provides quick access to various functions: Tickets, Change Requests, Calendar, Customers, My Approvals, Knowledge Base, Services, Search, Reporting, Dashboards, and Configuration. A "Navigation Bar" is visible on the left side. A "Notification and toolbar" is located in the top right corner. A "Dashboard" section at the bottom features a bar chart titled "New Tickets (Week by Week)" with a y-axis ranging from 500 to 700. Red arrows point to the Navigation Bar, Notification and toolbar, and Dashboard.

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

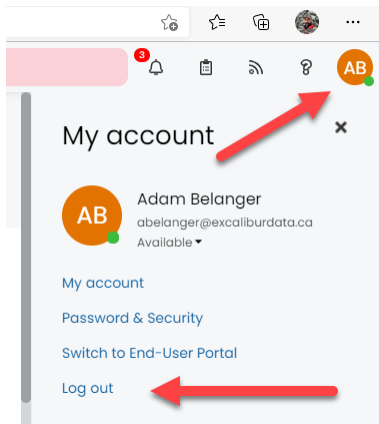
4. My Account menu / options that are available (see below)



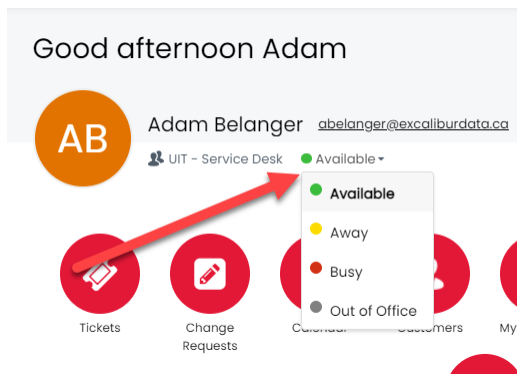
a. When you click My account, you are presented with the options below



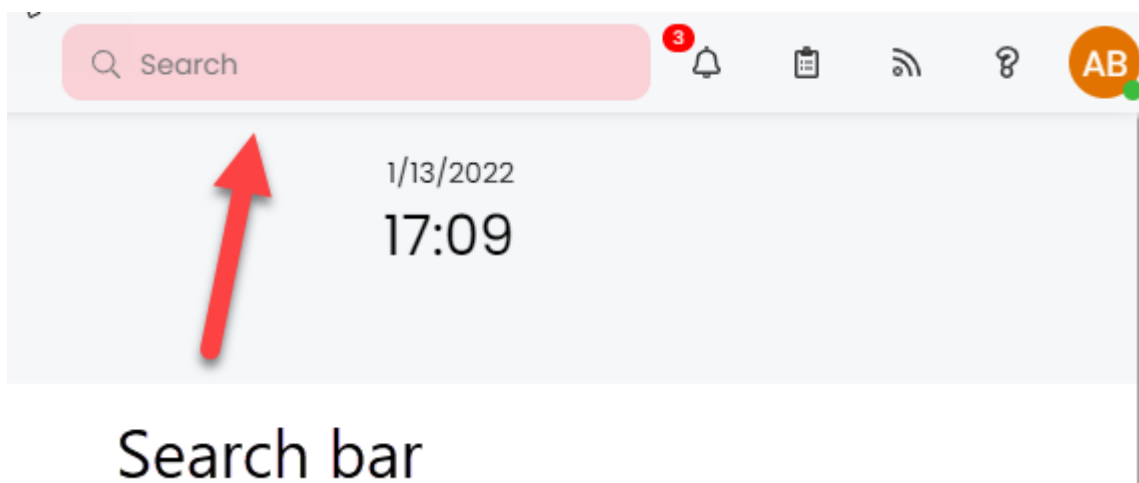
5. How to log out of the system (see below)



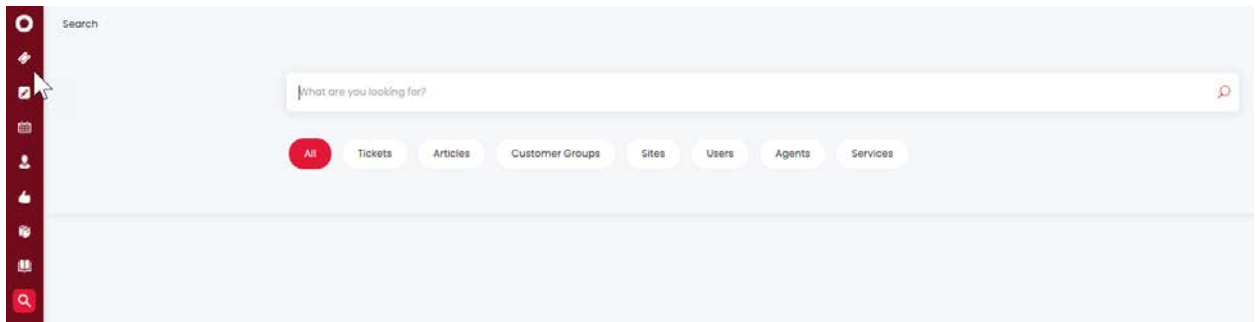
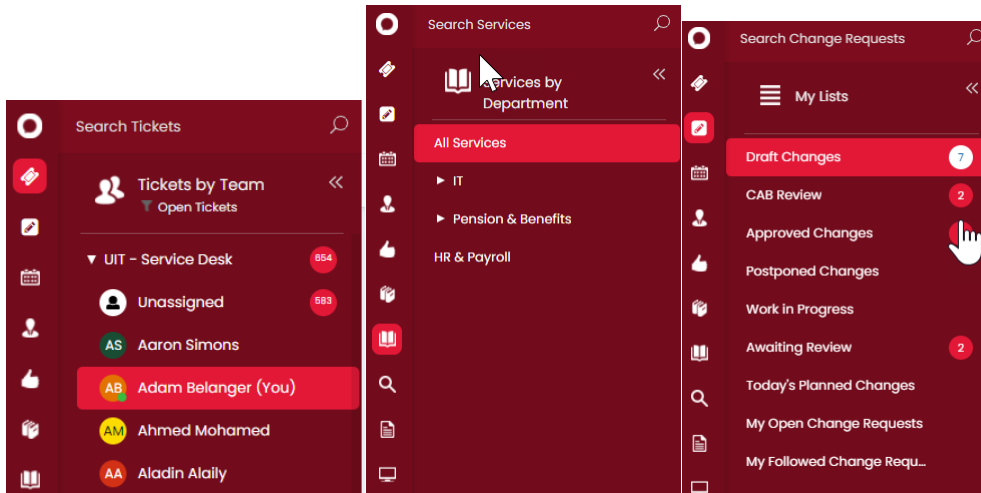
6. Change your status within the system (see below)



7. Search Bar



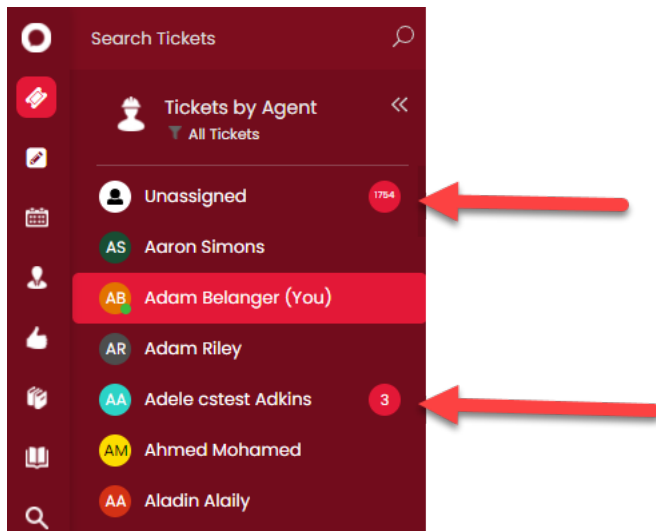
- a. As well as having a search bar on the main dashboard, you also have the search function in each of the section within your Navigation pane at the top
- b. There are multiple different ways to search for what you are looking for in HaloITSM



Lesson 2

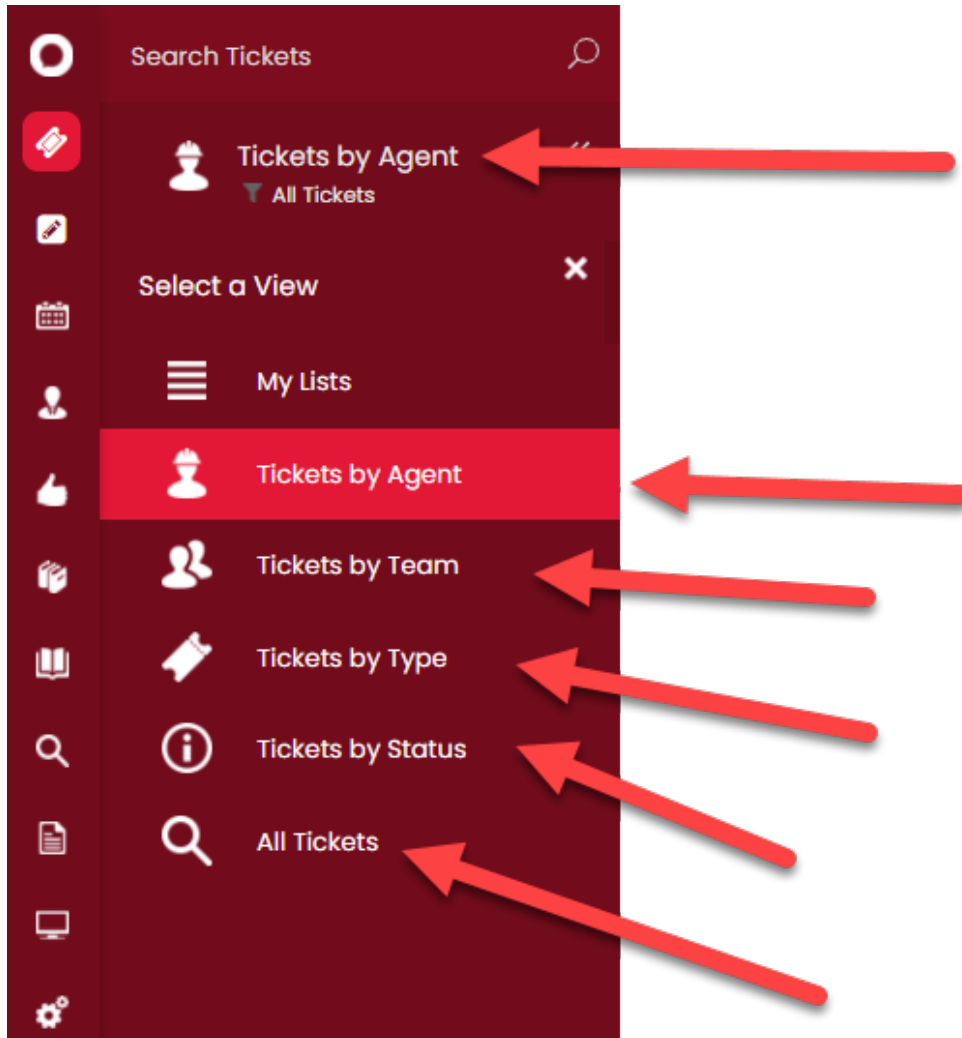
1. Locate a list of assigned and unassigned tickets

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

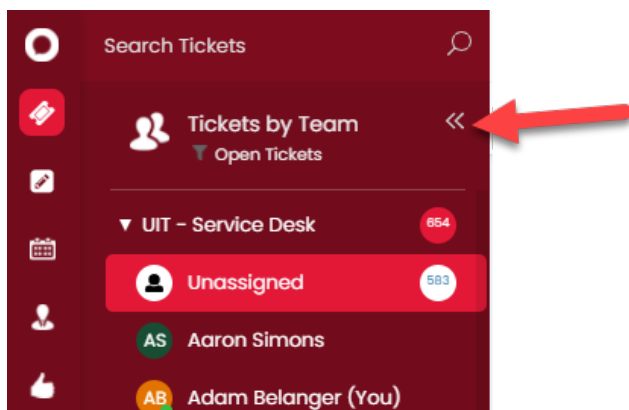


2. Locate a list of tickets assigned to a specific group or individual

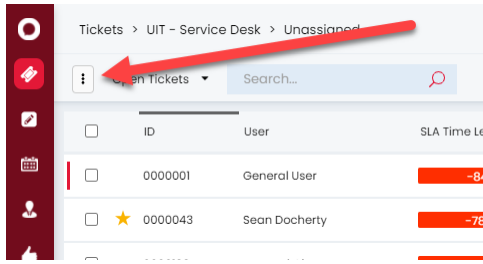
- a. Below you can see that by clicking on the top level, you can then filter your list by Agent, Team, Type, Status, All Tickets – or you can create a custom filter.



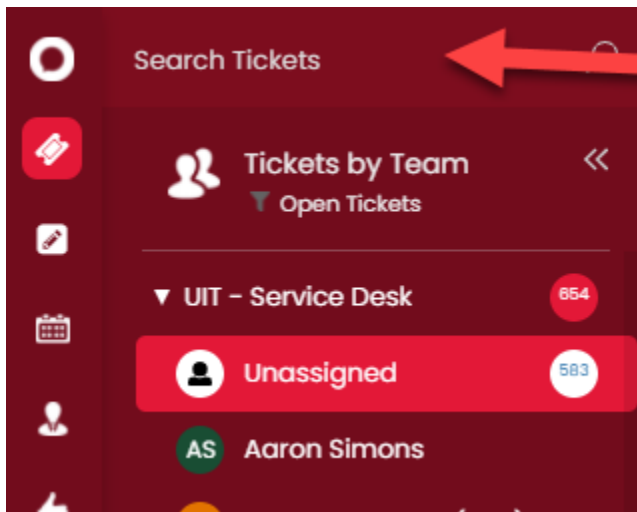
3. Hide or unhide the ticket pop-up menu



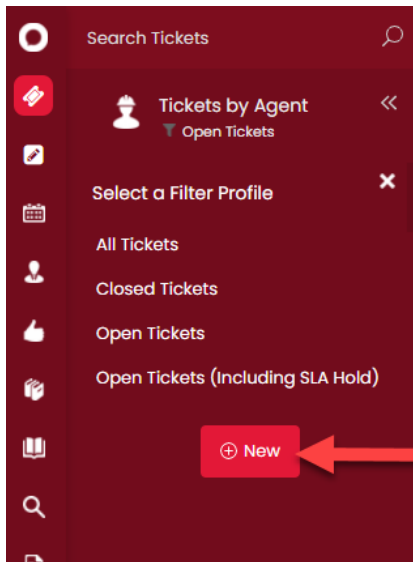
- a. Use the double << in the top picture to hide the ticket pop-up menu
- b. Use the ellipsis in the picture below to show the ticket pop-up menu again



4. Ad hoc search for selected tickets



5. Customize search





New Filter Profile

Filter Profile Name *

Use *

List Visibility *

Criteria ^

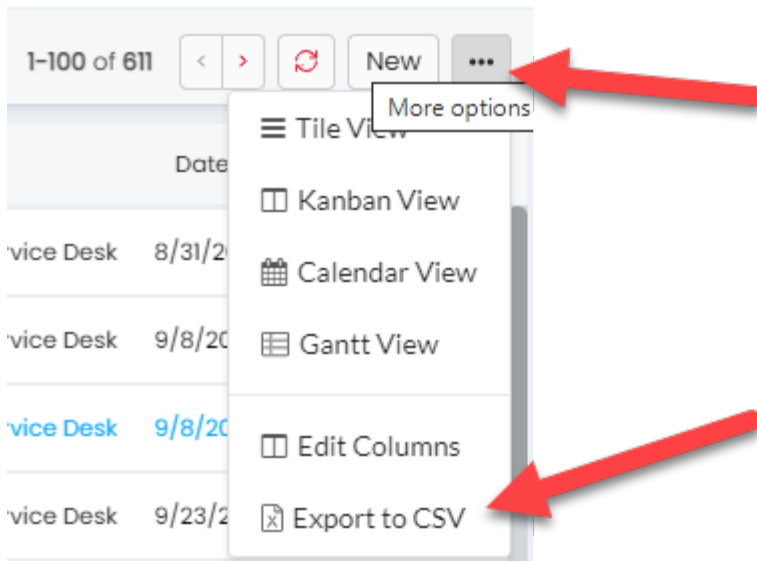
The following filters will be applied.

Field Name	Filter Type	Values
No rows found		

Add +

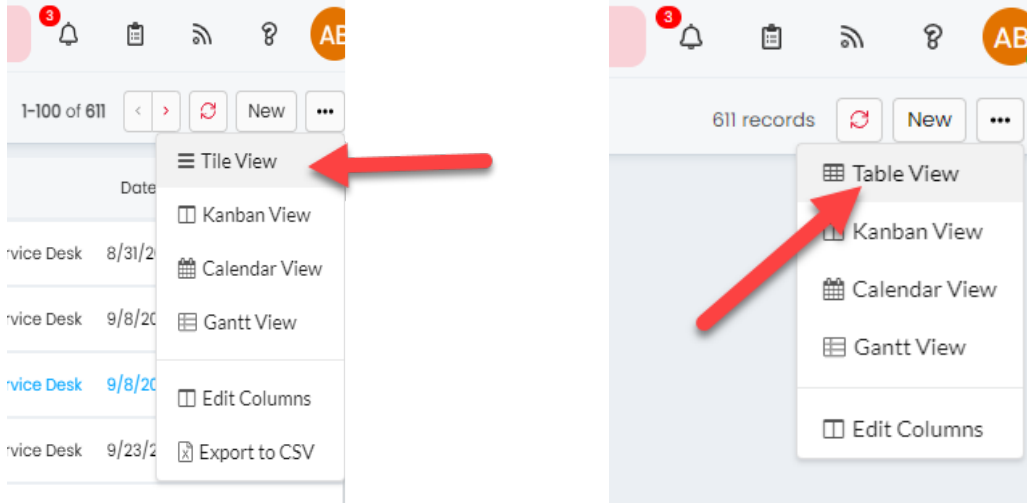
Previous Page 1 of 1 Next

6. Export a search list to CSV



7. Change between table and tile view

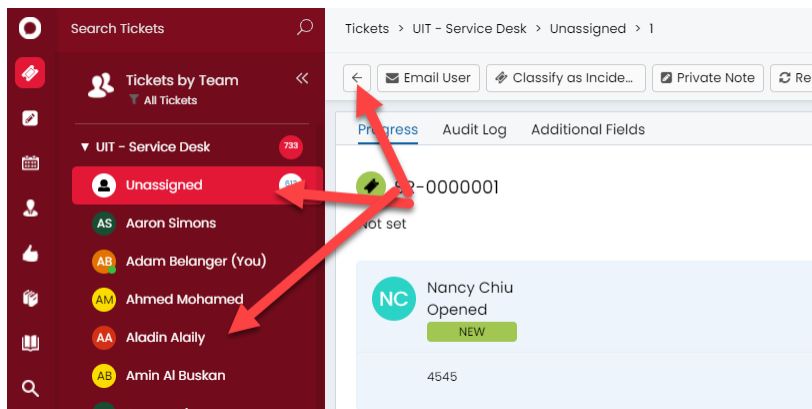
- When you click "Tile View" it changes to "Table view" and vice versa



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

ID	User	SLA Time Left	Summary	Priority	Status	Type	Category	Team	Date Reported
000001	General User	-643:17		Medium	NEW	Accounts & Access Man...		UIT - Service Desk	8/31/2021 12:42
000043	Sean & ...	-789:33		Medium	NEW	Accounts & Access Man...		UIT - Service Desk	9/8/2021 12:26
000044	Sean Docherty	On Hold		Medium	With User	Accounts & Access Man...		UIT - Service Desk	9/8/2021 13:28
000083	Leonard Chow	-692:04		Medium	NEW	Adobe Connect		UIT - Service Desk	9/23/2021 10:56
0000286	ulttest3	-672:00		Medium	NEW	Accounts & Access Man...		UIT - Service Desk	9/21/2021 14:18
0000289	ulttest2	-672:00		Medium	NEW	Accounts & Access Man...		UIT - Service Desk	9/21/2021 16:57
0000338	Leonard Chow	On Hold	Agent View - Validating Service Reque...	Medium	With User	Communication, Collab...		UIT - Service Desk	9/28/2021 16:35
0000335	Nancy Chiu		missing summary	Medium	CLOSED	Wordpress		UIT - Service Desk	9/29/2021 14:51
0000337	Nancy Chiu		Missing Summary field	Medium	CLOSED	Temporary Account (TA...		UIT - Service Desk	9/29/2021 15:19
0000357	Samira Solhan	-648:00	Validating bulk assignment	Low	NEW	Accounts & Access Man... Web Application\MyApp\U...		UIT - Service Desk	9/30/2021 09:50

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.

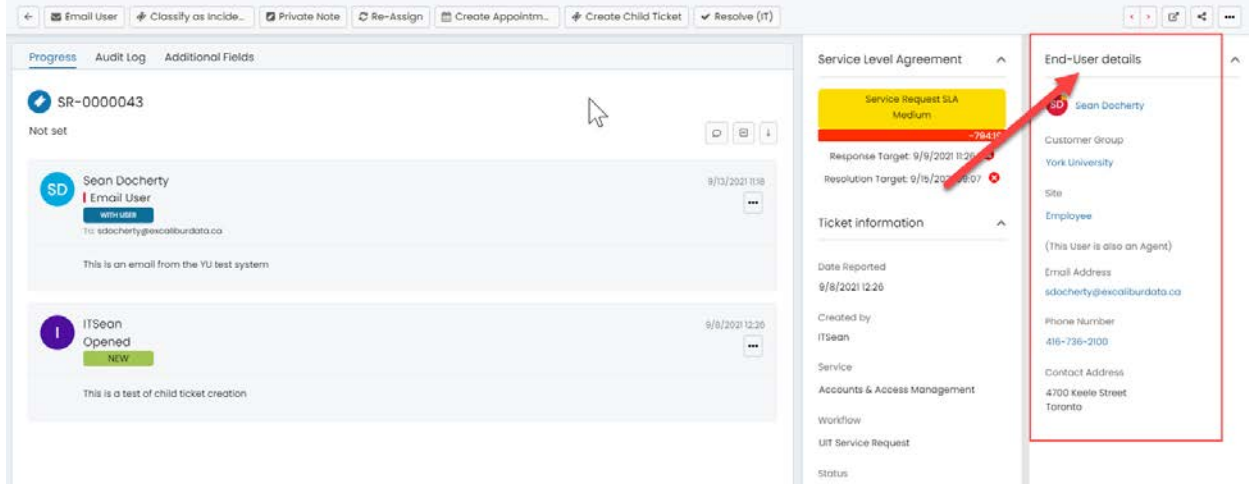
ID	User	SLA Time Left	Summary	Priority	Status	Type	Category	Team	Date Reported
0000001	General User	-047:53		Medium	NEW	Accounts & Access Man...	UIT - Service Desk	UIT - Service Desk	8/31/2021 12:42
0000043	Sean Docherty	-04:09		Medium	in progress	Accounts & Access Man...	UIT - Service Desk	UIT - Service Desk	9/8/2021 12:26
0000044	Sean Docherty	On Hold		Medium	with user	Accounts & Access Man...	UIT - Service Desk	UIT - Service Desk	9/8/2021 13:28
0000183	Leonard Chow	-096:42		Medium	NEW	Adobe Connect	UIT - Service Desk	UIT - Service Desk	9/23/2021 10:55
0000286	ulttest3	-018:38		Medium	NEW	Accounts & Access Man...	UIT - Service Desk	UIT - Service Desk	9/27/2021 14:18
0000289	ulttest3	-078:35		Medium	NEW	Accounts & Access Man...	UIT - Service Desk	UIT - Service Desk	9/27/2021 10:57

ID	User	SLA Time Left	Summary	Priority	Status	Type	Category	Team	Date Reported
0000001	General User	-047:59		Medium	NEW	Accounts & Access Man...	UIT - Service Desk	UIT - Service Desk	8/31/2021 12:42
0000043	Sean Docherty	-074:11		Medium	in progress	Accounts & Access Man...	UIT - Service Desk	UIT - Service Desk	9/8/2021 12:26
0000044	Sean Docherty	On Hold		Medium	with user	Accounts & Access Man...	UIT - Service Desk	UIT - Service Desk	9/8/2021 13:28
0000183	Leonard Chow	-096:42		Medium	NEW	Adobe Connect	UIT - Service Desk	UIT - Service Desk	9/23/2021 10:55

11. Find user details within a ticket

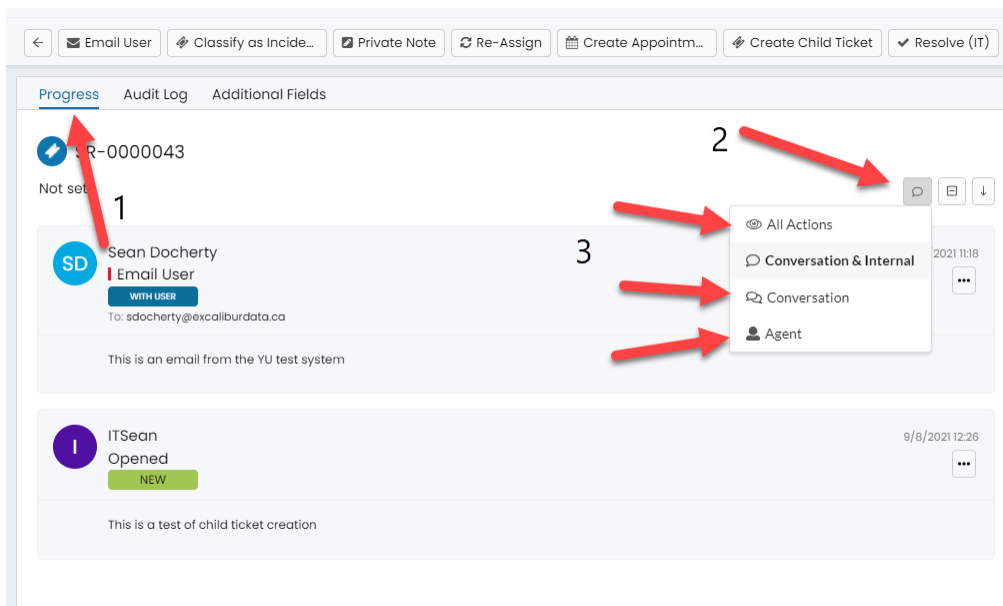
- a. User details can be found within the search details, and they can be found within a ticket within the following location.

ID	User	SLA Time Left	Summary	Priority	Status	Type	Category	Team	Date Reported
0000001	General User	-047:59		Medium	NEW	Accounts & Access Man...	UIT - Service Desk	UIT - Service Desk	8/31/2021 12:42
0000043	Sean Docherty	-074:11		Medium	in progress	Accounts & Access Man...	UIT - Service Desk	UIT - Service Desk	9/8/2021 12:26
0000044	Sean Docherty	On Hold		Medium	with user	Accounts & Access Man...	UIT - Service Desk	UIT - Service Desk	9/8/2021 13:28
0000183	Leonard Chow	-096:48		Medium	NEW	Adobe Connect	UIT - Service Desk	UIT - Service Desk	9/23/2021 10:55
0000286	ulttest3	-078:41		Medium	NEW	Accounts & Access Man...	UIT - Service Desk	UIT - Service Desk	9/27/2021 14:18



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:

[←](#) [Email User](#) [Classify as Incide...](#) [Private Note](#) [Re-Assign](#) [Create Appointm...](#) [Create Child Ticket](#) [Resolve \(IT\)](#)

[Progress](#) [Audit Log](#) [Additional Fields](#)

Action
Not set

Full Name
g

Passport York Username
m

York U Email Address
n

Phone Number or YorkU Extension
n

Additional Information
j

I have read and agree to the service agreement terms.
Yes

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

[←](#) [Email User](#) [Classify as Incide...](#) [Private Note](#) [Re-Assign](#) [Create Appointm...](#) [Create Child Ticket](#) [Resolve \(IT\)](#)

[Progress](#) [Audit Log](#) [Additional Fields](#)

Action
Not set

Full Name
g

Passport York Username
m

York U Email Address
n

Phone Number or YorkU Extension
n

Additional Information
j

I have read and agree to the service agreement terms.
Yes

Service Level Agreement

Service Request SLA
Medium
-696:58

Response Target: 9/24/2021 09:55

Resolution Target: 9/30/2021 05:55

Ticket information

Date Reported
9/23/2021 10:55

Created by
Nancy Chiu

Service
Adobe Connect

Workflow
UIT Service Request

Status
NEW

Team
UIT - Service Desk

Assigned Agent
Unassigned

Service Request Category
Adobe Connect/Host Privileges

End-User details

Leonard Chow

Customer Group
York University

Site
Employee

(This User is also an Agent)

Email Address
lchow@yorku.ca

Phone Number
416-736-2100

Preferred Number
416-736-5800

Contact Address
4700 Keele Street
Toronto

Network Login
lchow

15. View SLA information related to the ticket

The screenshot displays a ticket management interface. At the top, there are navigation buttons: "Email User", "Classify as Incide...", "Private Note", "Re-Assign", "Create Appointm...", "Create Child Ticket", and "Resolve (IT)". Below these are tabs for "Progress", "Audit Log", and "Additional Fields". The main content area is divided into two columns. The left column contains fields for "Action" (Not set), "Full Name" (g), "Passport York Username" (m), "York U Email Address" (n), "Phone Number or YorkU Extension" (n), and "Additional information" (j). A red arrow points from the "Additional Fields" tab to the "Service Level Agreement" section on the right. The "Service Level Agreement" section shows a yellow box with "Service Request SLA Medium" and a red bar with "-686:58". Below this, it lists "Response Target: 9/24/2021 09:55" and "Resolution Target: 9/30/2021 05:55". The right column contains "Ticket information" and "End-User details". The "Ticket information" section includes "Date Reported: 9/23/2021 10:56", "Created by: Nancy Chiu", "Service: Adobe Connect", "Workflow: UIT Service Request", "Status: NEW", "Team: UIT - Service Desk", "Assigned Agent: Unassigned", and "Service Request Category: Adobe Connect/Host Privileges". The "End-User details" section includes "Leonard Chow", "Customer Group: York University", "Site: Employee", "Email Address: lchow@yorku.ca", "Phone Number: 416-736-2100", "Preferred Number: 416-736-5800", and "Contact Address: 4700 Keele Street Toronto".

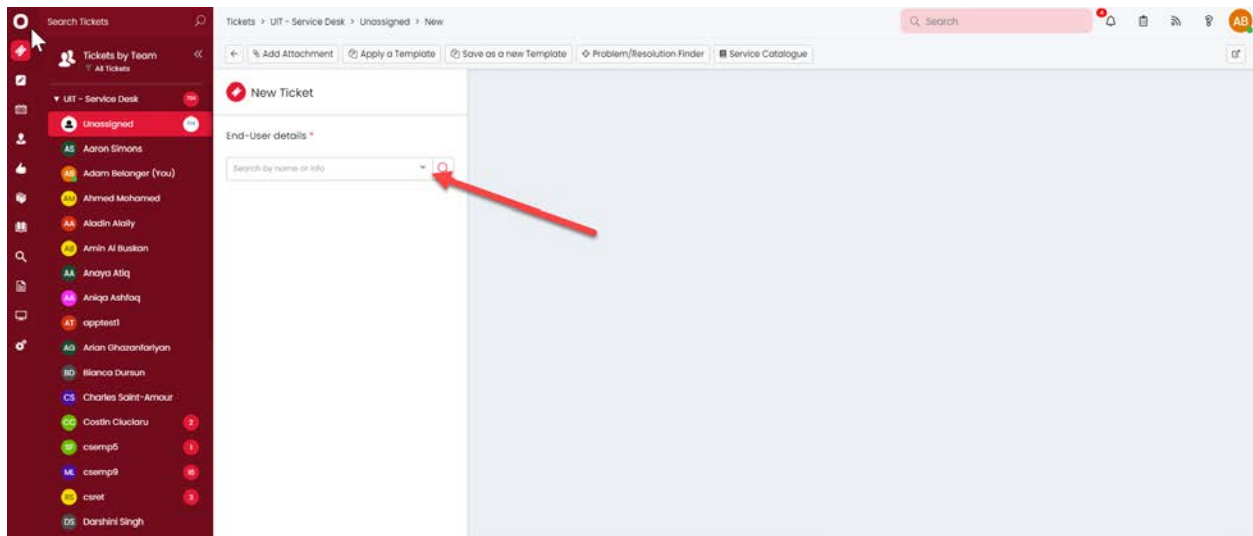
Lesson 3

1. Log a new ticket from within the platform

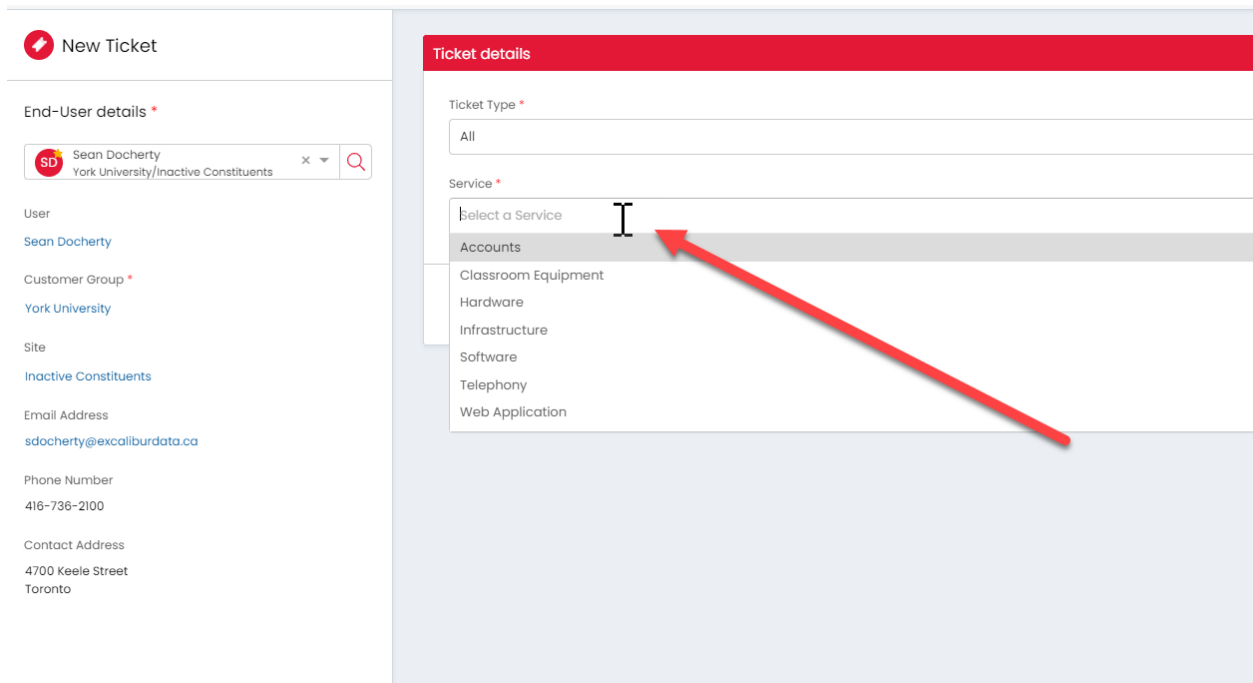
- From the tickets section of the navigation pane, select "New" on the top right of the screen

The screenshot shows a mobile application interface. On the left is a dark red navigation pane with a search bar and a "Tickets" button. Below "Tickets" are options for "All Tickets", "Unassigned" (734), and a list of agents: "Aaron Simons", "Adam Belanger (You)", "Ahmed Mohamed", and "Aladin Alaily". A red arrow points from the "Tickets" button to the "New" button in the main content area. The main content area has a search bar, a notification bell, and a "New" button with a red arrow pointing to it. Below the search bar is a table with columns "Category", "Team", and "Date Reported". The table contains two rows of data: "S Access Man..." from "UIT - Service Desk" on "8/31/2021 12:42" and "S Access Man..." from "UIT - Service Desk" on "9/8/2021 12:26".

- 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.

Ticket details

Ticket Type *
All

Service *
Hardware

Details

Category *
x

Summary *
x

Details *
A: [Rich Text Editor Icons]

Please provide a detailed description and include screenshots where possible.

4
1/1

- 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.

Details ^

Category *

Summary *

Details *

⏏ A: [bullets] [numbered] [quote] [link] [image] [emoji] [font-size] [font-color] [insert] [undo] [redo]

Please provide a detailed description and include screenshots where possible.

Insert Canned Text

- CS Accounts ▾
- Default Group ▾
- ITSM Global Response ▾
- Service Desk ▾

Impact Urgency Priority *

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

Details *

⏏ A: [bullets] [numbered] [quote] [link] [image] [emoji] [font-size] [font-color] [insert] [undo] [redo]

Please provide a detailed description and include screenshots where possible.

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.

[Add Attachment](#)
[Apply a Template](#)
[Save as a new Template](#)
[Problem/Resolution Finder](#)
[Service Catalogue](#)

New Ticket

End-User details *

Sean Docherty
 York University/Inactive Constituents

User
Sean Docherty

Customer Group *
York University

Site
Inactive Constituents

Email Address
sdocherty@excaliburdata.ca

Phone Number
416-736-2100

Contact Address
4700 Keele Street
Toronto

Category *

Summary *

Details *

Please provide a detailed description and include screenshots where possible.

Impact Urgency Priority *

Team * Agent *

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.

Search Tickets

Tickets > UIT - Service Desk > Unassigned > New

[Add Attachment](#)
[Apply a Template](#)
[Save as a new Template](#)
[Problem/Resolution Finder](#)
[Service Catalogue](#)

New Ticket

End-User details *

Sean Docherty
 York University/Inactive Constituents

User
Sean Docherty

Customer Group *
York University

Site
Inactive Constituents

Email Address
sdocherty@excaliburdata.ca

Phone Number
416-736-2100

Contact Address
4700 Keele Street
Toronto

Ticket details

Attachments
 YarkU - HaloITSM.docx

Ticket Type *
All

Service *
Hardware

Details

Category *

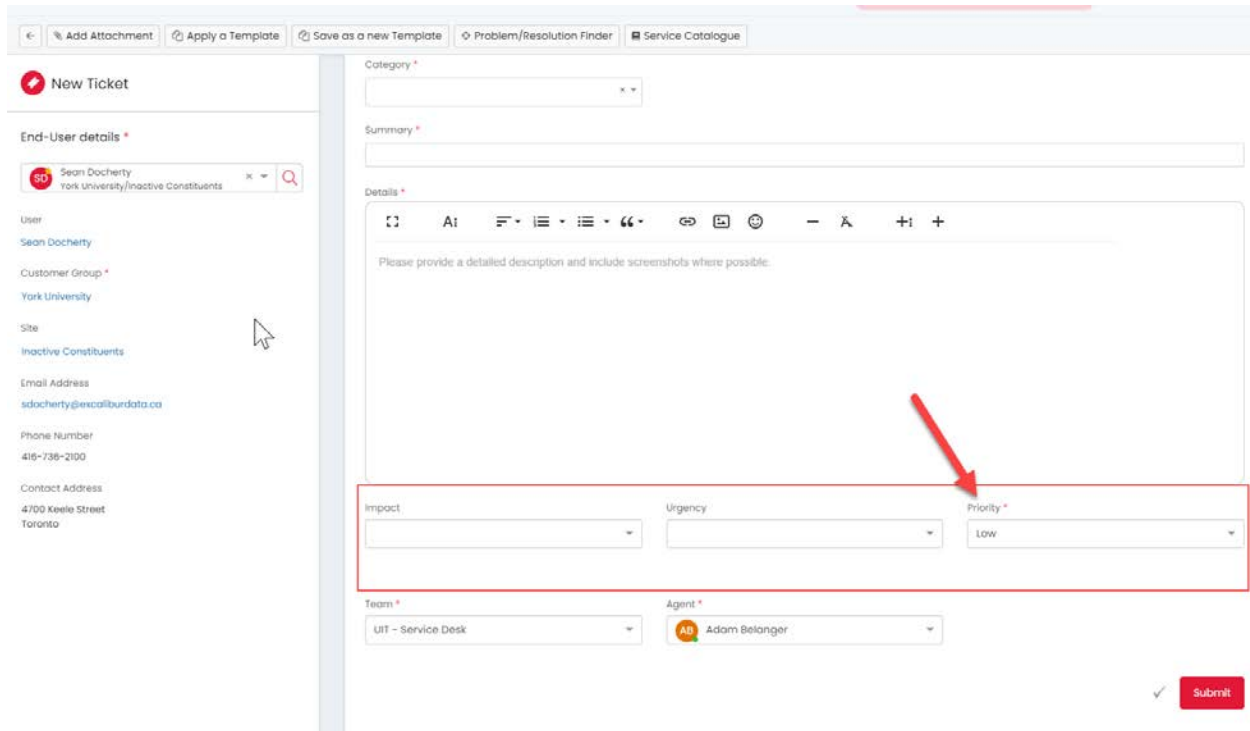
Summary *

Details *

Please provide a detailed description and include screenshots where possible.

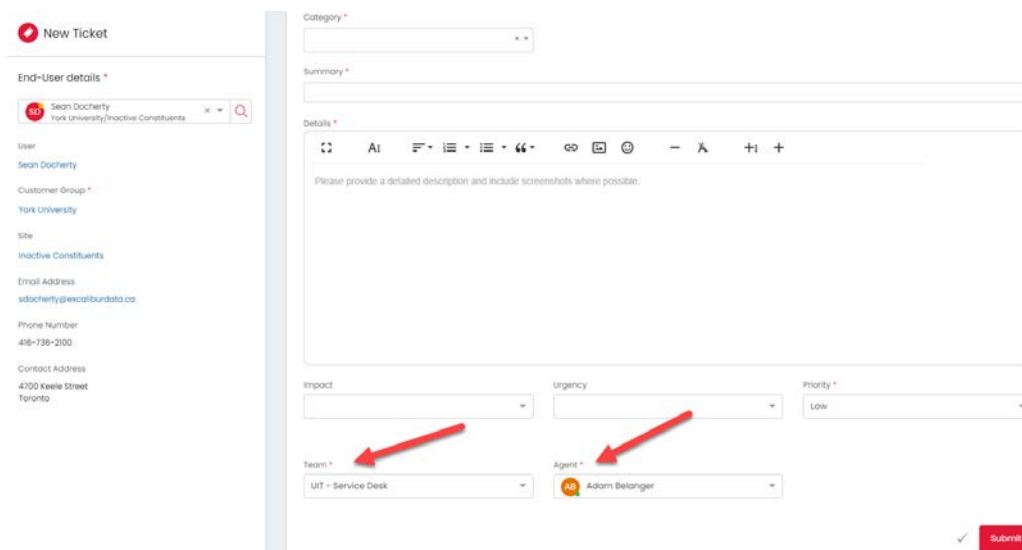
i. Prioritize a ticket

- 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



The screenshot shows the 'New Ticket' form in a web application. On the left, there is a sidebar with 'End-User details' for Sean Docherty, including his user ID, customer group (York University), site (Inactive Constituents), email address, and phone number. The main form area contains several fields: 'Category', 'Summary', and a rich text editor for 'Details'. Below the rich text editor, there are three dropdown menus: 'Impact', 'Urgency', and 'Priority'. The 'Priority' dropdown is currently set to 'Low'. A red box highlights these three dropdown menus, and a red arrow points to the 'Priority' dropdown. Below these are 'Team' (set to 'UIT - Service Desk') and 'Agent' (set to 'Adam Belanger') dropdowns. A 'Submit' button is located at the bottom right.

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



This screenshot is identical to the one above, showing the 'New Ticket' form. In this version, two red arrows point to the 'Team' and 'Agent' dropdown menus. The 'Team' dropdown is set to 'UIT - Service Desk' and the 'Agent' dropdown is set to 'Adam Belanger'. The 'Priority' dropdown remains set to 'Low'. The 'Submit' button is visible at the bottom right.

- 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.

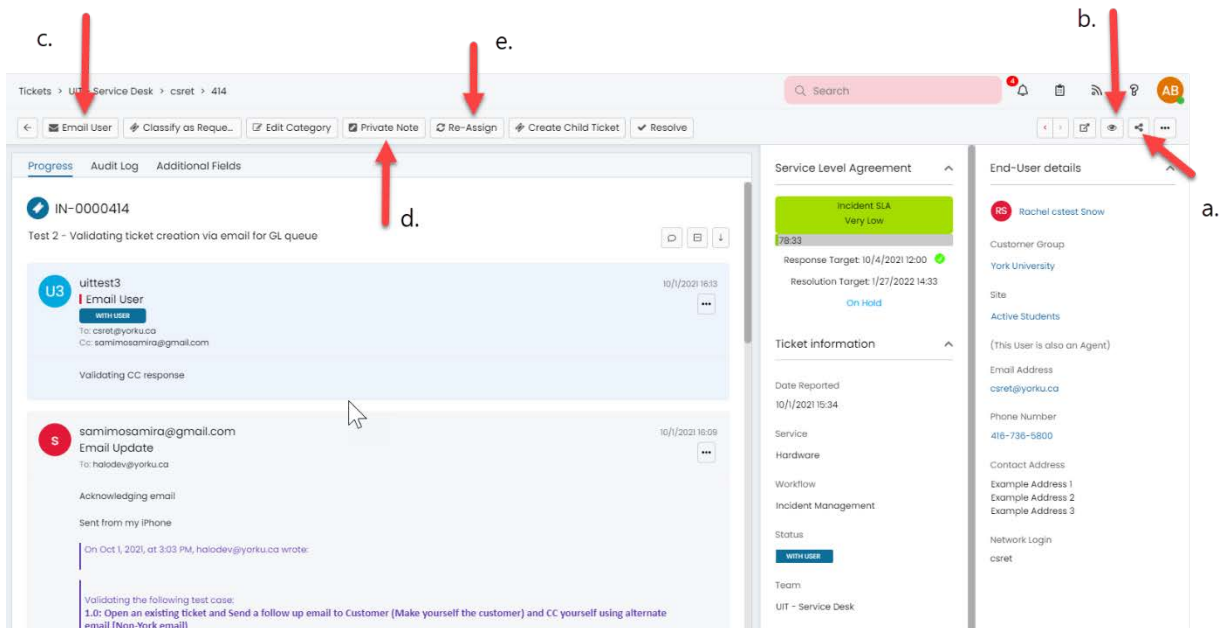
The screenshot shows the 'New Ticket' form in a service desk system. The breadcrumb trail is 'Tickets > UIT - Service Desk > Unassigned > New'. The top navigation bar includes 'Add Attachment', 'Apply a Template' (highlighted with a red arrow), 'Save as a new Template', 'Problem/Resolution Finder', and 'Service Catalogue'. The form fields include: 'Category' (dropdown), 'Summary' (text area), 'Details' (rich text editor with a toolbar and a note: 'Please provide a detailed description and include screenshots where possible.'), 'Impact' (dropdown), 'Urgency' (dropdown), 'Priority' (dropdown, set to 'Low'), 'Team' (dropdown, set to 'UIT - Service Desk'), and 'Agent' (dropdown, set to 'Adam Belonger'). A 'Submit' button is at the bottom right.

Lesson 4

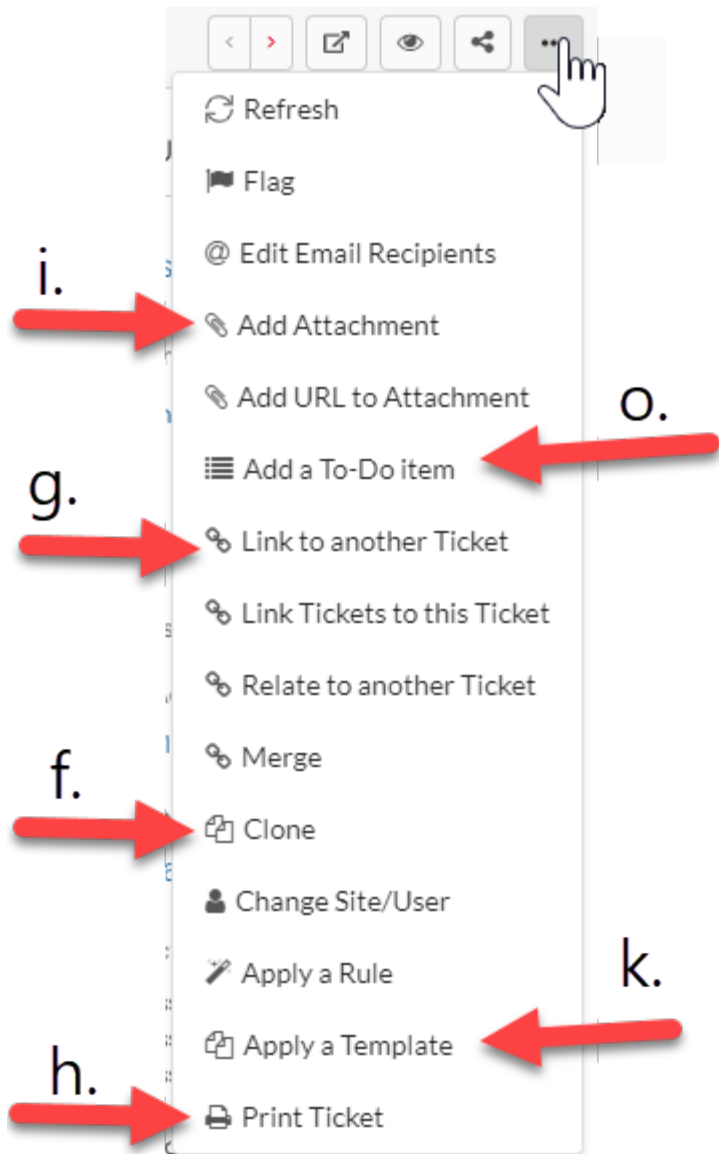
1. Locate within the ticket the action items menu

The screenshot shows a ticket detail view for 'SR-0000001'. The ticket is 'Opened' by 'Nancy Chiu' on '8/31/2021 12:42'. The 'Action Items' menu is open, showing various actions. The 'Apply a Template' option is highlighted with a red arrow. The menu items include: Refresh, Flag, Edit Email Recipients, Add Attachment, Add URL to Attachment, Add a To-Do Item, Link to another Ticket, Link Tickets to this Ticket, Relate to another Ticket, Merge, Clone, Change Site/User, Apply a Rule, Apply a Template (highlighted), Problem/Resolution Finder, Print Ticket, and Delete. The ticket details on the right include: Service Level Agreement (Service Request SLA, Medium), Response Target (9/1/2021 11:42), Resolution Target (9/7/2021 07:42), Ticket information (Date Reported: 8/31/2021 12:42, Created by: Nancy Chiu, Service: Accounts & Access Management, Workflow: UIT Service Request, Status: NEW, Team: UIT - Service Desk, Assigned Agent: Unassigned, Service Request Category: Security, Identity & Authentication Systems/Onboarding).

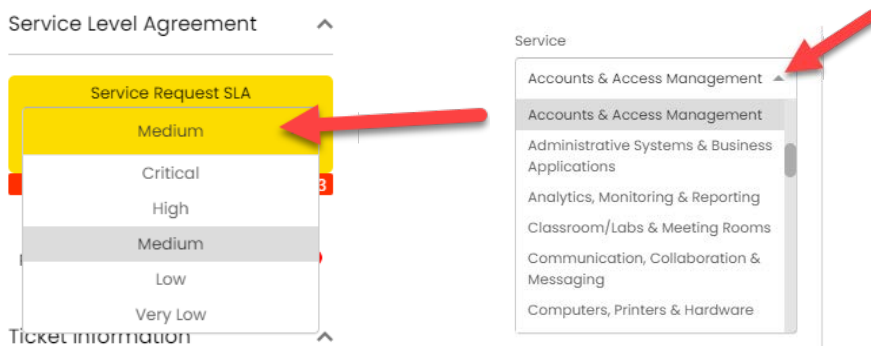
- Share a ticket;** allows you to copy a link and share this ticket to be shared with others
- Follow a ticket;** this will allow you to follow this ticket and receive updates as the ticket progresses
- Email a user from a ticket;** allows you to email the end-user with details from the ticket
- Create 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
- Reassign a ticket to another team;** allows you to assign the ticket to another team internally



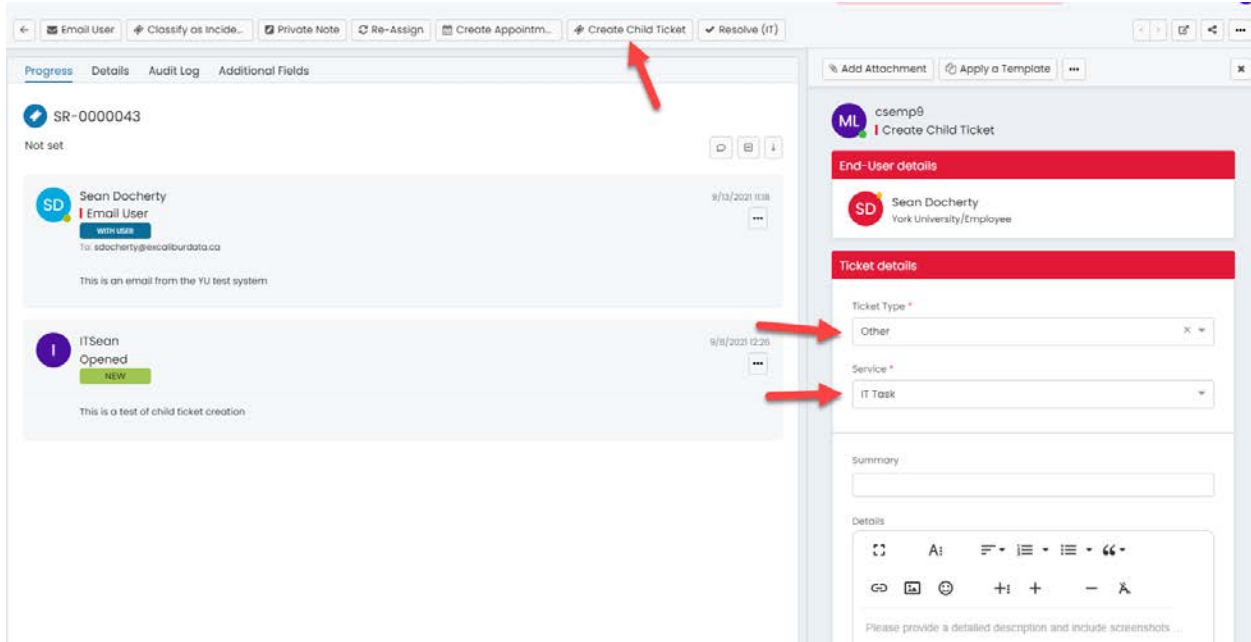
- Clone a ticket;** This allows you to take the information from your current ticket and make a copy “clone” all the details if multiple people are having the same issue or logging the same request.
- Link a ticket to another ticket;** if there is already another ticket logged related to your request,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



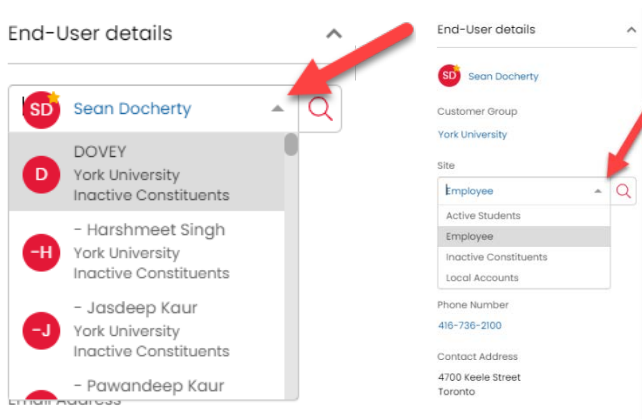
- j. **Modify ticket details such as classification or priority;** this allows you to update and change both the classification and priority of the ticket.



- 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.

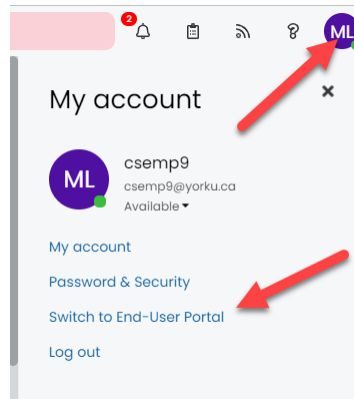


- o. **Add a To-Do list to a ticket;** allows you to add a list of tasks as a reminder “to-do” that must be reviewed and completed to finalize a particular request.
- p. **Resolve a ticket;** allows to you indicate that the work has been completed, however, the ticket can then be re-opened later if certain 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”.



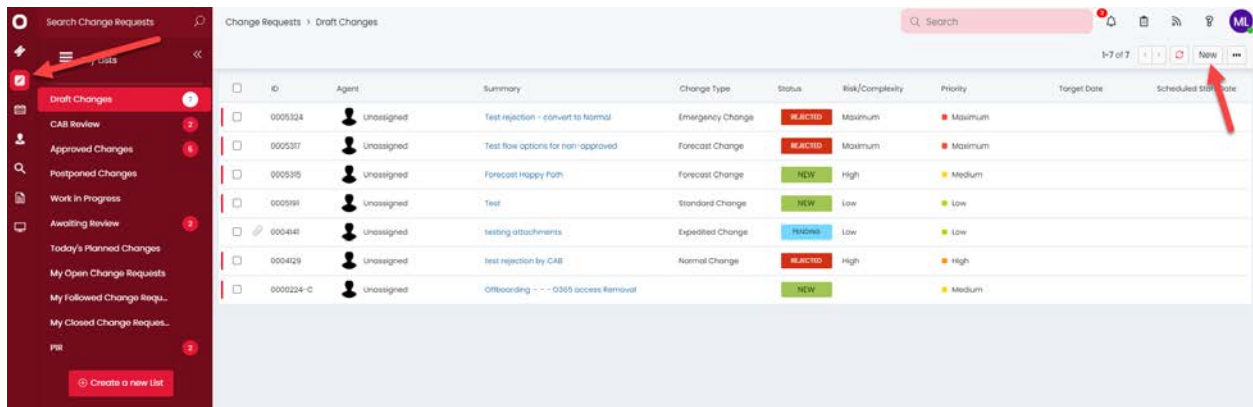
Lesson 6

- 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;**

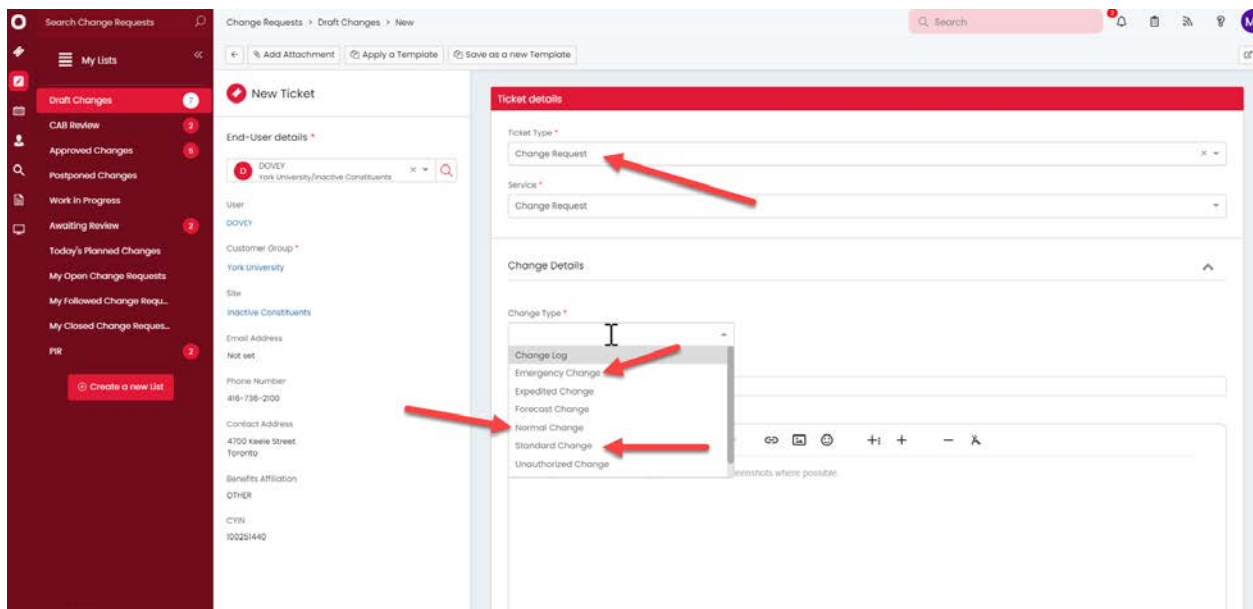
Lesson 7

- 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

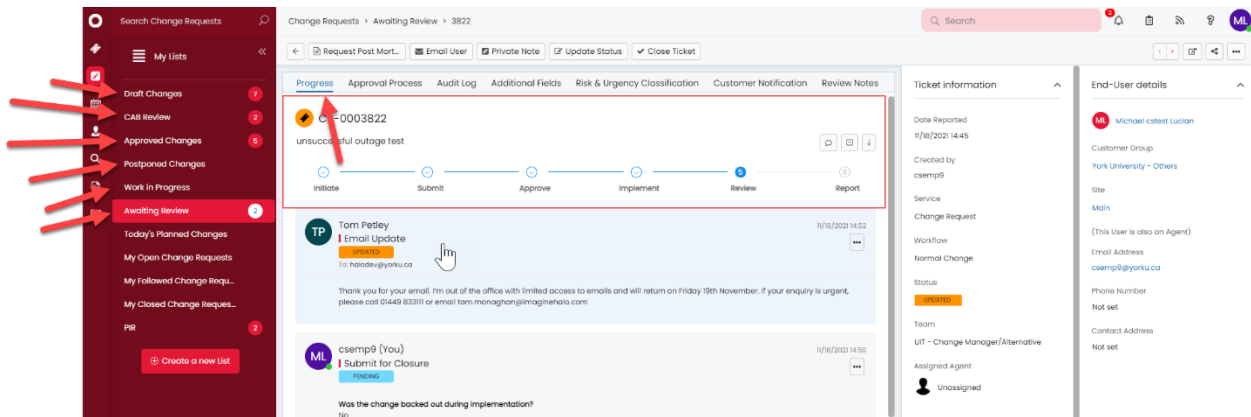
(Items “a. b. c.”) Click on the Change Request button from the navigation menu. Click “New” on the upper right side of your screen.



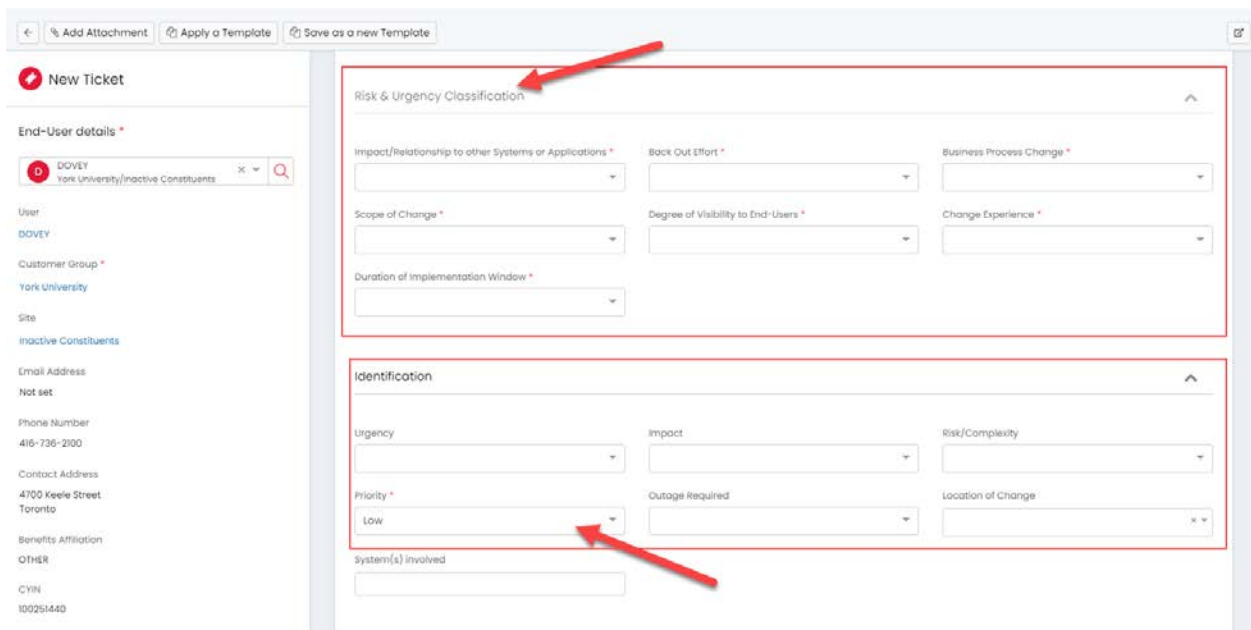
Below you are presented with the Change Request screen, with each of the “Change Types” (Standard, Normal, Emergency) among others.



- 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.

The screenshot displays a Change Request management interface. On the left is a dark red sidebar with navigation options: Search Change Requests, My Lists, Draft Changes (7), Call Review (2), Approved Changes (5), Postponed Changes, Work in Progress, Awaiting Review (2), Today's Planned Changes, My Open Change Requests, My Followed Change Reque..., My Closed Change Reques..., and PIR (2). A 'Create a new List' button is at the bottom of the sidebar. The main content area is titled 'Change Requests > Awaiting Review > 3822'. It features a top navigation bar with tabs: Progress (selected), Approval Process, Audit Log, Additional Fields, Risk & Urgency Classification, Customer Notification, and Review Notes. Below the tabs, a workflow diagram shows the process: Initiate -> Submit -> Approve -> Implement -> Review -> Report. The 'Review' step is currently active. A red box highlights the 'Progress' tab and the workflow diagram. Below the workflow, there are two messages: one from Tom Petley (TP) regarding an 'Email Update' and another from csemp9 (you) regarding a 'Submit for Closure'. The right sidebar contains 'Ticket information' and 'End-User details'. The 'Ticket information' section includes: Date Reported (11/18/2021 14:45), Created by (csemp9), Service (Change Request), Workflow (Normal Change), Status (Submitted), Team (UIT - Change Manager/Alternative), and Assigned Agent (Unassigned). The 'End-User details' section includes: Name (Michael ctest Lucian), Customer Group (York University - Others), Site (Main), and Contact Address (Not set).