



Caltech

Institute Business
Systems | IMSS

Caltech Help

QuickStart Guide for Clients

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Introduction

“Caltech Help” is a ticket tracking application that anyone in the Caltech community can use to submit a request for help with work-related computer issues. In Caltech Help, customers are called “clients.”

Accessing Caltech Help

There are two ways to access the Caltech Help ticket system. You may go through [access.caltech](https://access.caltech.edu/) or you may send an email to the system. (This is known as email injection.) Anyone with an [access.caltech](https://access.caltech.edu/) account can use the Caltech Help client interface to create and manage tickets.

Logging in to Caltech Help

1. Go to [access.caltech](https://access.caltech.edu/), at: <https://access.caltech.edu/>.
2. Log in to [access.caltech](https://access.caltech.edu/).
3. On the [access.caltech](https://access.caltech.edu/) home page, go to the “Self Service” section and click on the link entitled “Caltech Help.” The Caltech Help Log In screen will appear.
4. Enter your [access.caltech](https://access.caltech.edu/) username and password and click on the “Log In” button.

Using Email to Make a Request


1. To email a help request, use the email address help@caltech.edu.
2. Make the Subject descriptive.
 - a. Bad: Request for help
 - b. Good: My desktop computer quit working and now it won't start.
3. Enter any other information in the email that will help the Help Desk process your request, such as date and time of the occurrence, whether it has occurred before, any error messages you have received, etc.
4. Include attachments if relevant. (See the security notice below.)

SECURITY NOTE: Do not include sensitive data in any emails, tickets, or attachments intended for Caltech Help. Sensitive data include—but are not limited to—Social Security numbers, bank account numbers, health information, dates of birth, compensation data, and donor information. If you have a question about sensitive data, please email security@caltech.edu.



Navigating the Help Request Client Interface

After you log into access.caltech and click on the Caltech Help link, you will be taken to the Caltech Help client interface below. Across the top left part of the screen are five tabs: Request, History, FAQs, Messages, and Profile.

1. **Request** tab: This is where you create a new Help Request ticket.
2. **History** tab: Here you can view your own ticket history. You can search for tickets by Ticket Number or Status, or by entering a text string in the “Contains” field.
3. **FAQs** (Frequently Asked Questions) tab: Here you can search for FAQs that pertain to your question or issue. To search, you can select a Category from the dropdown list, or enter a text string into the “Contains” field. If you know your FAQ number, enter it into the FAQ # field.
4. **Messages** tab: In this tab, you can view messages from the techs who are working on your ticket(s).
5. **Profile** tab: This tab contains your User Profile information. The information comes from the same system that manages access.caltech. The only field you can update here is the “Use HTML E-Mail” checkbox. If any other changes are needed, go to My Personal Information in access.caltech.
6. Finally, you will see your name in the upper right corner of the screen. Next to it is the “Log Out”  button. Click on it to log out of the application.





Creating a Help Request

In order to create a Help Request ticket, you must fill in the fields listed below:

- Request Type: Make your selections from a dropdown list.
- Subject: Enter a high level description of your request.
- Request Detail: Enter details relevant to your request.

NOTE: You will see “Cancel” and “Save” buttons in the lower right corner of the screen. The “Save” button will be grayed out until you enter the required ticket information.

A screenshot of the Caltech Help Request Tracking System web interface. The header is orange and contains the Caltech logo, the text "Caltech Help Request Tracking System", and the user name "Karen Breau" with a profile icon. Below the header is a navigation bar with buttons for "Request", "History", "FAQs", "Messages", and "Profile". The "Request" button is circled in red. The main content area is titled "Help Request" and contains the following fields: "Request Type" (a dropdown menu), "Subject" (a text input field), "Request Detail" (a large text area), "Location" (a dropdown menu with "Information Management System" selected), and "Room" (a dropdown menu with "137A" selected). At the bottom right of the form are "Cancel" and "Save" buttons.



Request Type Fields

You must select a Request Type before you can submit a Help Request ticket. The more selections you make, the more specific your Request Type becomes and the better the Techs can respond to your request.

- Select a Request Type from the dropdown menu in the Request Type field. As soon as you select your first Request Type, another Request Type field will appear next to it. Continue selecting Request Types until no more fields appear.
- If you do not want to see any more Request Type options, you can select “Other” from the dropdown list in the field. This will complete the Request Type selection process for the ticket. If you want to see more options, continue selecting Request Types.
- In the sample below, the user is selecting four Request Types:

Help Request

Request Type **1** IMSS **2** Report a problem :

3 Email & Calendar :

4 Cannot receive / send emails

Subject Email & Calendar account request

Request Detail Help with Out of Office Assistant

Depending on the combination of Request Types you select, your ticket view may change. For instance:

- Fields asking for more information will appear below the Request Detail area.
- FAQs relating to a combination of Request Types will appear on the right side of the screen.

Attachments

You may add attachments to a ticket at any time. However, if you are working on a new ticket, the Attachments section will not be visible until you enter some information into the Request Type field(s).

Saving and Submitting Your Help Request Ticket

Clicking on the “Save” button will save your ticket and submit it to the Caltech Help system. You will get two confirmations—one from the system (see below) and one in your email inbox. You will also be able to see your ticket in the History tab.

Thank You!

Your ticket number is **175**.
You can use the History button above to check the status of your ticket.

An email confirmation is on its way to **karen.breau@caltech.edu**.



Managing Your Tickets

Clients may search for and view any of their tickets, update their tickets by adding Notes, and cancel their own tickets.

Search for Tickets

Go to the History tab to search for your tickets. You may enter a Ticket Number, select a Status, or enter a text string into the Contains field to narrow your search.

The screenshot shows the Caltech Help Request Tracking System interface. The user is logged in as Karen Braau. The 'History' tab is selected and circled in red. Below the navigation tabs, the 'Ticket History' section is visible. It includes search fields for 'Ticket No.', 'Status' (set to 'All'), and 'Contains', along with 'Clear' and 'Search' buttons. A table of tickets is displayed below, with the first ticket (ID 175) highlighted. A red arrow points to the blue ticket number icon '175' in the table.

Id.	Date	Updated	Status	Request Detail	Survey	URL
181	8/10/2012	8/10/2012	Open	Need test instance for LDAP cloning procedure: I will need a test instance for a week or so for auto...		
180	8/10/2012	8/10/2012	Open	Remove Create Supplier Button on Supplier Inquiry Form - HAKA3: When I access the Supplier Inquiry f...		
179	8/10/2012	8/10/2012	Open	Online payslip web page issue - using chrome browser: I am receiving the following error when I log ...		
178	8/10/2012	8/10/2012	Open	Request to modify several Cognos reports that can be run in both the FY or ITD View: The modificatio...		
177	8/10/2012	8/10/2012	Open	Firefox ESR Browser Compatibility Updates Needed: Dear Tester, We are in the process of updating the...		

Add a Note to Your Ticket

After you have submitted a ticket, you may update it by adding a "Note." Go to the History tab to locate the ticket you want to update. Open the ticket by clicking on the blue ticket number icon **175** on the left side of the screen. In the ticket view, click on the "Add Note" button. After you're done, click on the "Save" button to save your note.

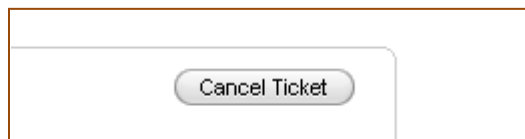
The screenshot shows the 'Ticket 166' view. The ticket details are displayed, including 'Report Date: 8/03/2012 10:59 am', 'Status: Open', 'Est. Due Date: Never', 'Location: IMSS South', 'Room: Room 137', 'Department: IMSS', 'Request Type: IMSS + Admin Apps + ... Other ...', 'Request Detail: This is a test of required fields for training documentation.', and 'Tech: Joe Admin'. At the bottom, there is a 'Notes' section with a table for adding notes. The 'Add Note' button is circled in red, and a red arrow points to it from the text above.

Date	Name	Note Text
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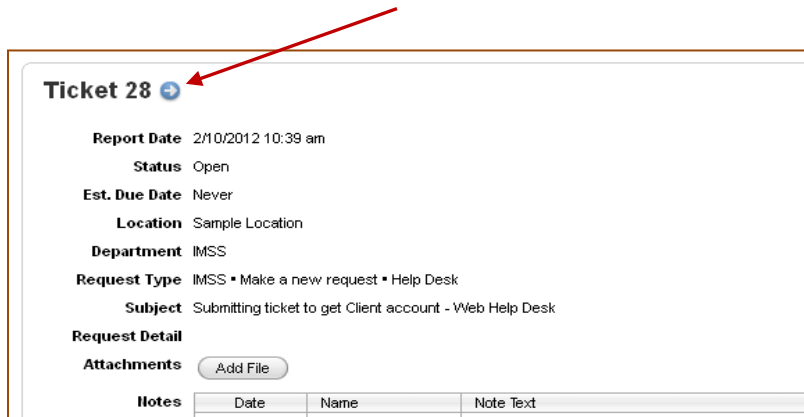
Cancel Your Ticket

If you have already submitted a ticket and want to cancel it, first locate your ticket in the History tab. Open the ticket and click on the “Cancel Ticket” button in the upper right corner of the screen. After it is cancelled, you will still be able to view the ticket but no further action will be taken on it by the Tech. (NOTE: Tickets cannot be completely deleted from the system.)



Bookmark or Email a Ticket

In the ticket view, you can bookmark or email the URL for a ticket by right-clicking on the blue arrow icon.



Print a Ticket

There is no Print button in the Help Request client interface. However, you may use your browser to print one ticket or a list of tickets.