HEAT Call Logging User Guide

University of Massachusetts
UMASS Lowell

Office of Information Technology
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Overview

This document is intended for the sole use of UMass Lowell employees who provide Tier 1 and Tier 2 assistance as outlined below. It is not intended as a training manual for Tier 3 Help Desk staff. It is assumed that users of this manual have had the HEAT client installed on their PC and that a login account has been created.

This document will provide an overview of the HEAT application and provide instructions on using HEAT to create new tickets and to acknowledge, re-assign, and close existing tickets.

The HEAT Call Logging application is a tool that will initially track the logging and resolution of issues related to the e*mpac HR/Financials system and the ISIS Student Administration system. It will eventually be the tool to log all other issues from our different systems. An ***issue*** is any event that prevents a user from completing an operation in the e*mpac or ISIS applications. Examples of issues that may occur include:

- the inability to log into any e*mpac, or ISIS environment, e-mail, domain
- the appearance of error messages;
- the inability of a system to perform in an expected manner;
- the inability of a user to perform a particular action (e.g. run a query, generate a report, access e-mail, access internet);
- the inability to utilize network resources

Upon receiving a call from a user, the Help Desk will create a ***ticket*** (record the issue) and assign it to the appropriate Tier and Group for resolution.

Tier 1 consists of the current Help Desk staff. Tier 1 responsibilities include:

- logging all calls in the Help Desk system
- analyzing calls to determine the nature of the problem
- use predefined scripts and past experience to resolve the problem or determine the appropriate Tier-Two group for triage
- reset e*mpac and ISIS system passwords
- escalate calls to Tier-Two and Tier-Three as needed
- follow up with Tier-Two and Tier-Three to ensure calls get closed

Tier 2 includes technical experts, functional experts and a security administrator. The technical experts are networking and telecommunications staff and desktop support specialists. Functional experts provide assistance with the daily operations associated with the system and are key users such as core team members from the e*mpac and ISIS projects and the training team. Security administrators will have the ability to assign, modify or remove accounts and permissions.

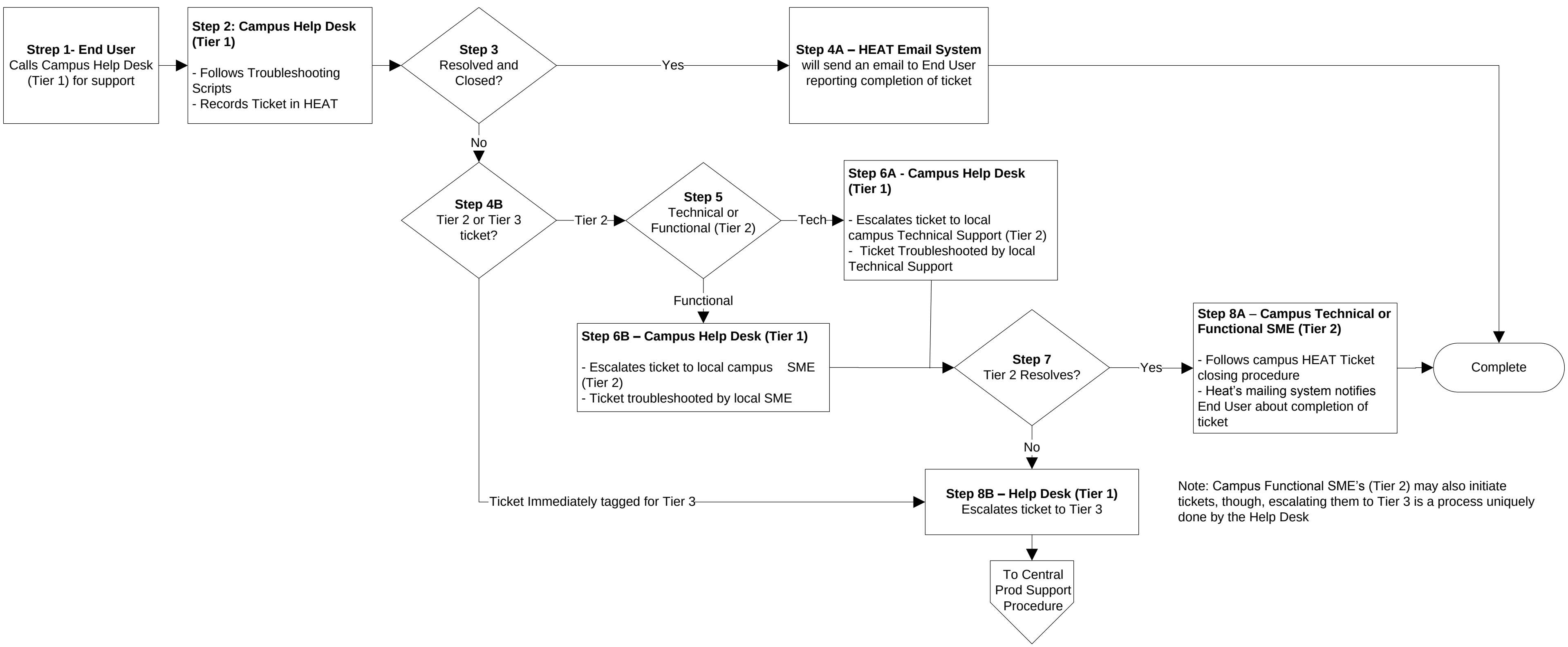
Tier 2 responsibilities include:

- working directly with users to resolve problems, providing training to the user, if necessary
- working with campus SMEs to resolve problems
- providing scripts to the Help Desk to answer and resolve calls that are frequent in nature
- escalating calls to the Tier-Three Help Desk, as appropriate.
- communicating system status and planned outages to Tier-One, Tier-Three and the appropriate management staff through a well-defined process
- re-assigning calls to another Tier 2 group, as appropriate

Tier 3 staff will include functional experts with deep and broad knowledge of the PeopleSoft applications as well as developers and technical infrastructure support.

Upon resolution, it is the responsibility of the person who resolved the issue to update the HEAT database (i.e. ***close the ticket***) and contact the user with the appropriate solution. HEAT will provide notifications to the user and technician through email (when ticket has been open, assigned, and solved), though if further assistance is needed, technician should contact user upon completion or follow up

Issue Resolution Flowchart



Logging into HEAT

Before logging into UMass Lowell's version of HEAT please be sure that the full version of HEAT has been installed on your PC. If you are unsure, please contact the Help Desk at X4357.

To log into HEAT using the full client, (not iHEAT)
Navigate to **Program Files> HEAT > Call Logging** or double-click on the Call Logging icon located on your desktop.

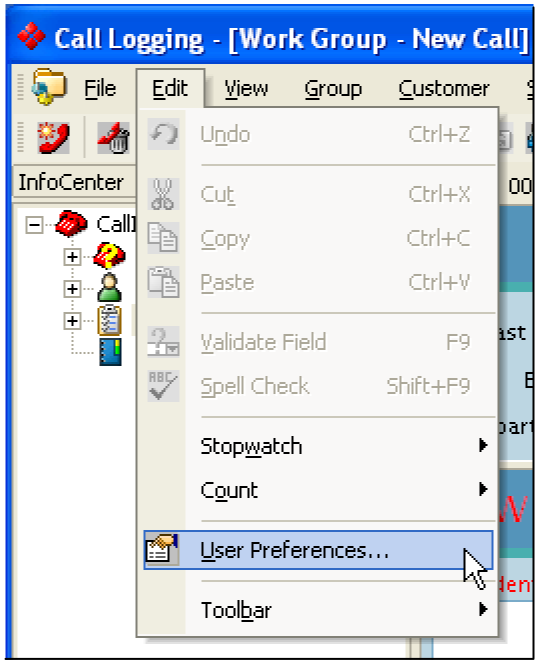
Log into Call Logging:

- Username = first initial (CAPITALIZED) last name (lowercase) i.e. Jose Guerrero = Jguerrero
- Password = TICKET

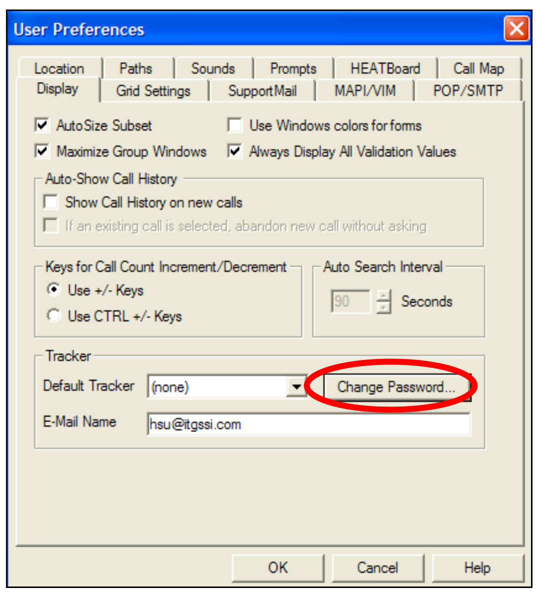
IMPORTANT: PLEASE CHANGE YOUR PASSWORD - see next page

Changing Your Password

Navigate to **Edit > User Preferences**



On the **User Preferences** window; click on **Change Password**

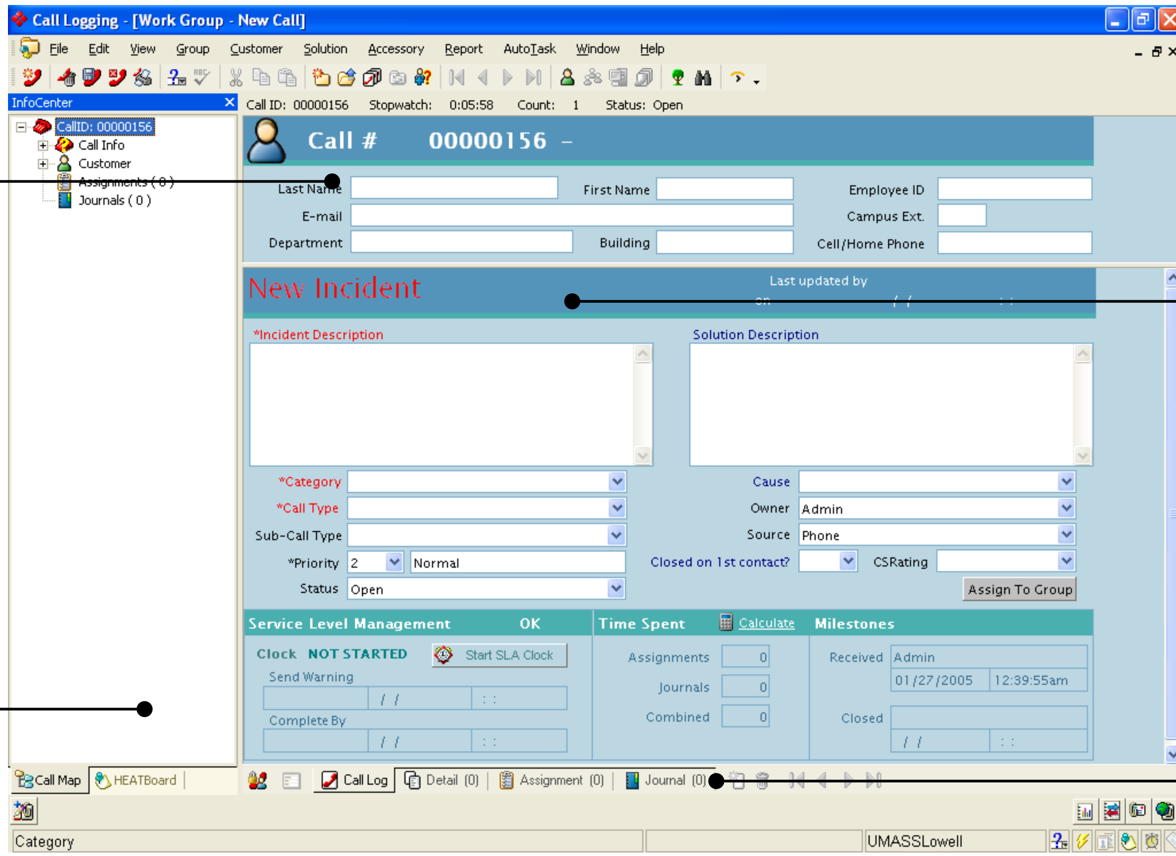


If you ever require assistance with HEAT, you will need to provide this password. Otherwise, the HEAT Admin will reset the password to HEAT in order to troubleshoot.

HEAT Call Logging Overview

The Profile Subset appears at the top of each Call Record. The Profile is the background information on an employee or individual making the request. The Profile Subset is selected information from the Profile table, and is part of the Call Record. This information is obtained from the Voice System. If info is erroneous, make changes, they will be saved.

The InfoCenter appears in a pane next to the Call Record. It contains two tabs: The Call Map and the HEATBoard. The Call Map is an expandable and collapsible summary view of the currently displayed Call Record. With the HEATBoard (not shown), members of a team can post and read issues from other team members and receive system-wide information.

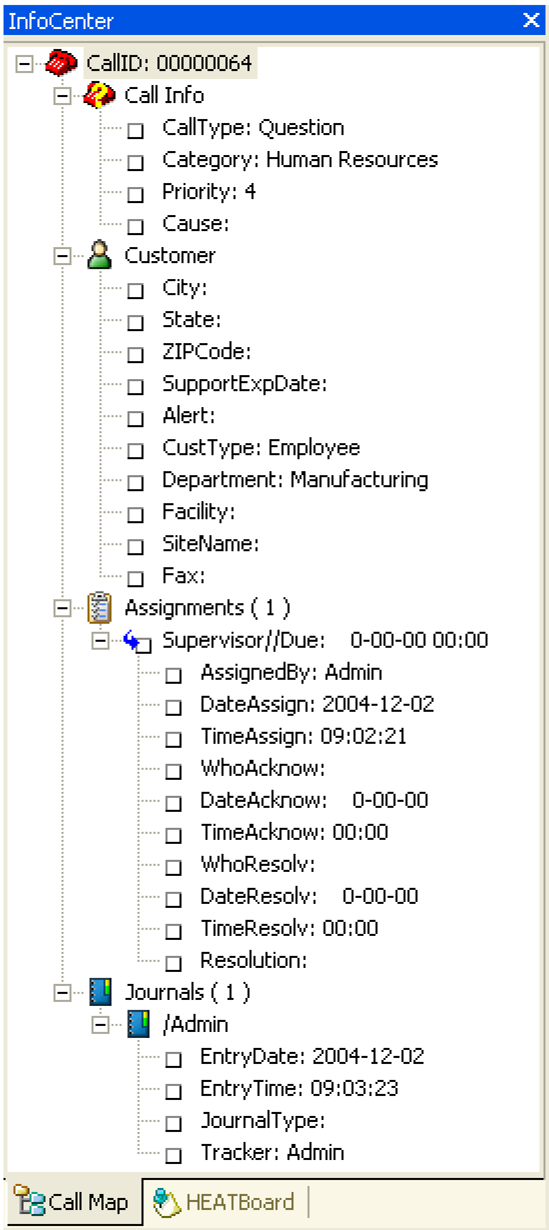


The Call Record appears below the Profile Subset. In it, you type basic information about the record. This screen holds information about the specific call such as Call Type, closure information, etc. It can be validated and auto-filled from a variety of different tables.

Control Buttons are located near the bottom of the Call Logging screen. With these buttons, you can navigate among the call record information areas and display other information. Click the Call Log, Detail, Assignment, or Journal tabs to display the information associated with each tab.

InfoCenter - Call Map –

The Call Map gives you a quick overview of the currently displayed Call Record. It displays information about calls, users, journals, and assignments.



Looking at the Call Map you can quickly view overdue assignments, call status, current assignees, etc. Specialized icons highlight key information that requires attention such as past due dates.

The number of journals and assignments can be included in the display of those nodes. When opened, the Call Map becomes an additional pane on your Call Logging Window. It can be displayed as hidden or moved, depending on your personal preference.

InfoCenter - HEATBoard –

The HEATBoard is used to post important issues that might generate a number of calls. For example, if a server is down, numerous users may call. Posting this to the HEATBoard can help alert the support team.

All calls related to a HEATBoard issue can be linked to the issue.

The HEATBoard is team based. Issues can be specified for global viewing or team viewing. Depending on how the HEATBoard is defined in User Preferences, each team can be represented on the HEATBoard by a bar.

A bar labeled Global displays issues posted for global viewing. An envelope icon on a team bar indicates that issues have been posted for that team.

Only team members can view issues associated with a specific team, but all users with HEATBoard access can view Global team issues.

Call Log Screen

The Call Record appears below the Profile Subset. In it, you type information about the call. This screen holds information about a specific call such as Call Type, call description, solution information, etc. It can be validated and auto-filled from a variety of different tables.

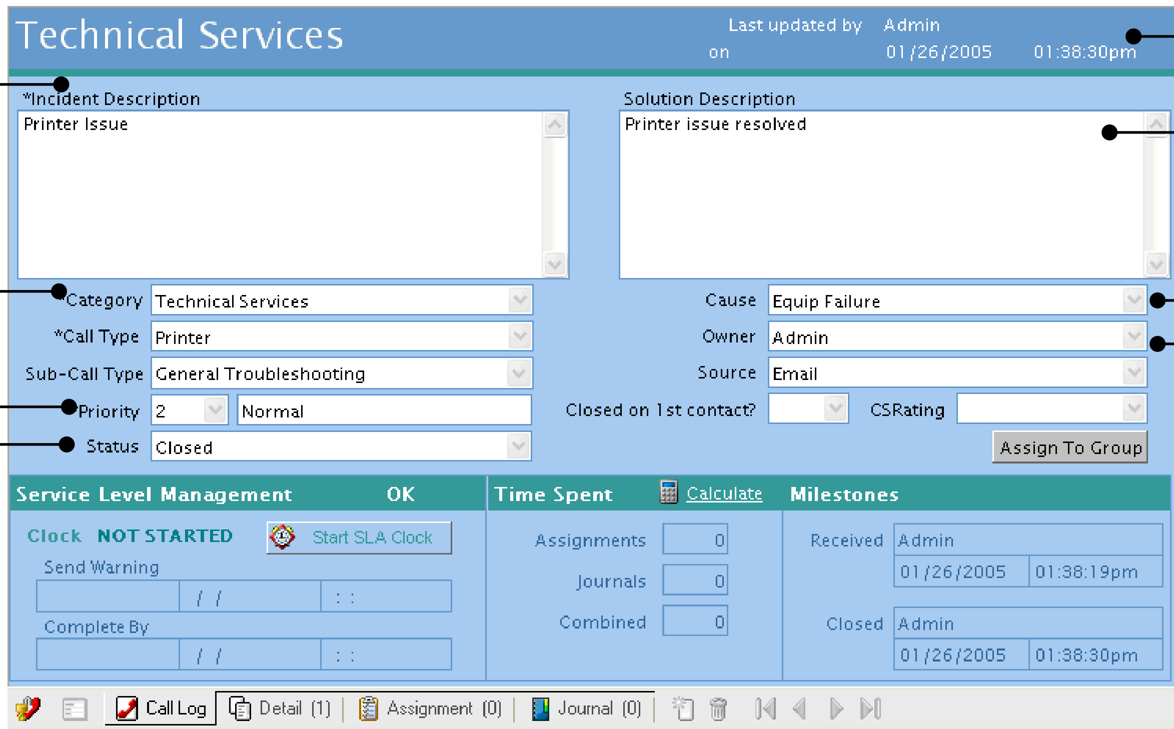
Below is a description of some of the key fields on the Call log screen.

Incident Description is a memo field where additional issue details can be stored. Important notes or emails can be pasted here.

Categories such as Technical Services, Network, and Peoplesoft allow you to classify issues at a high level.

Priority indicates the level of urgency given to this issue.

Status includes: Closed, Open Pending and Reopened.



Last Updated by automatically tracks who last updated the call.

Solution Description is a required memo field where a summary of the resolution is stored.

Cause indicates the major application that is affected or the primary cause.

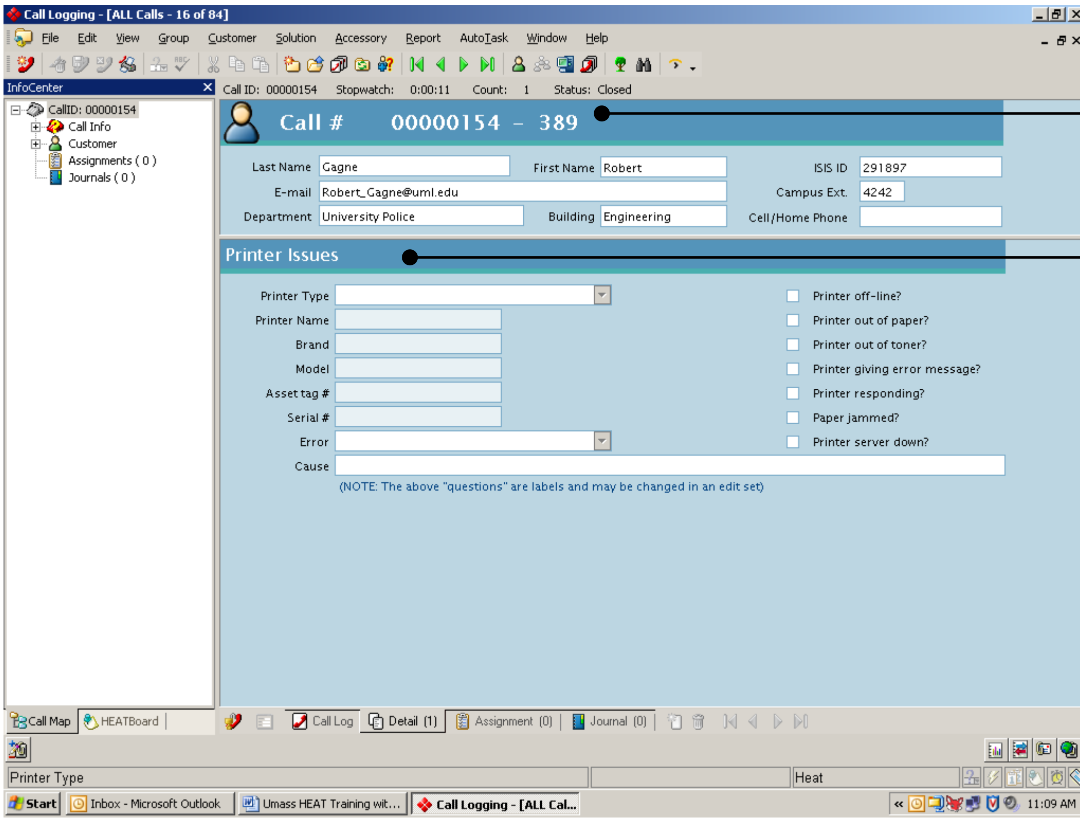
Owner automatically tracks who received and closed the call.

** Please be extra careful with the **language** to be used when filling the **Incident** and **Solution Descriptions**. This text will be sent to customers in the form of an email so that they are notified of the status of their ticket. **

Detail Screen

Certain Call Types have Detail Screens. The Detail screen is where specific information is collected and managed about certain Call Types. These details will provide the necessary information for managing requests and issues.

This sample Detail Screen is for a **<Printer >** problem:



Detail Screens can allow you to quickly enter important information about this type of call.

**Detail Screens can also include other types of fields such as date fields.*

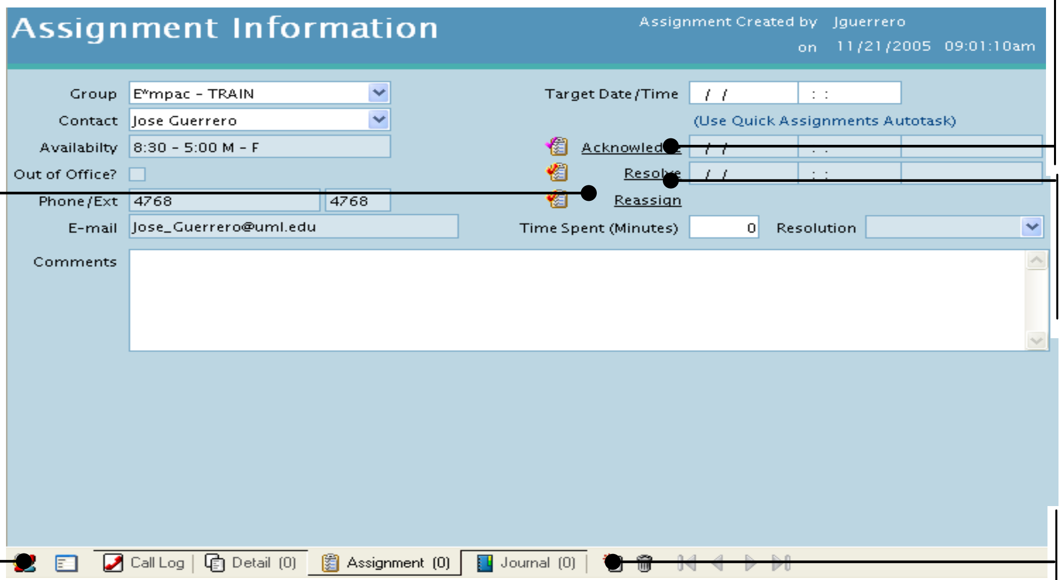
Assignment Screen

Each Call Record may be assigned to a specialized group. A group has multiple technical or functional staff, with sufficient experience to handle tickets. You can create more than one assignment, assigning a Call Record to multiple groups. Each assignment appears in the Call Record.

> *To create a new **Assignment**, click the Assignment tab. Right-click the Assignment screen. Select New Assignment. Select a group from the Group drop-down box. Type any comments or instructions into the Comments field (This process will be taken care of at the Help Desk)*

Reassign it will prompt you to the assignment screens

Grid icon displays multiple assignments at once



Acknowledge indicates that you are aware of this assignment and stops email reminders

Resolved indicates that you resolved your responsibilities on this assignment.

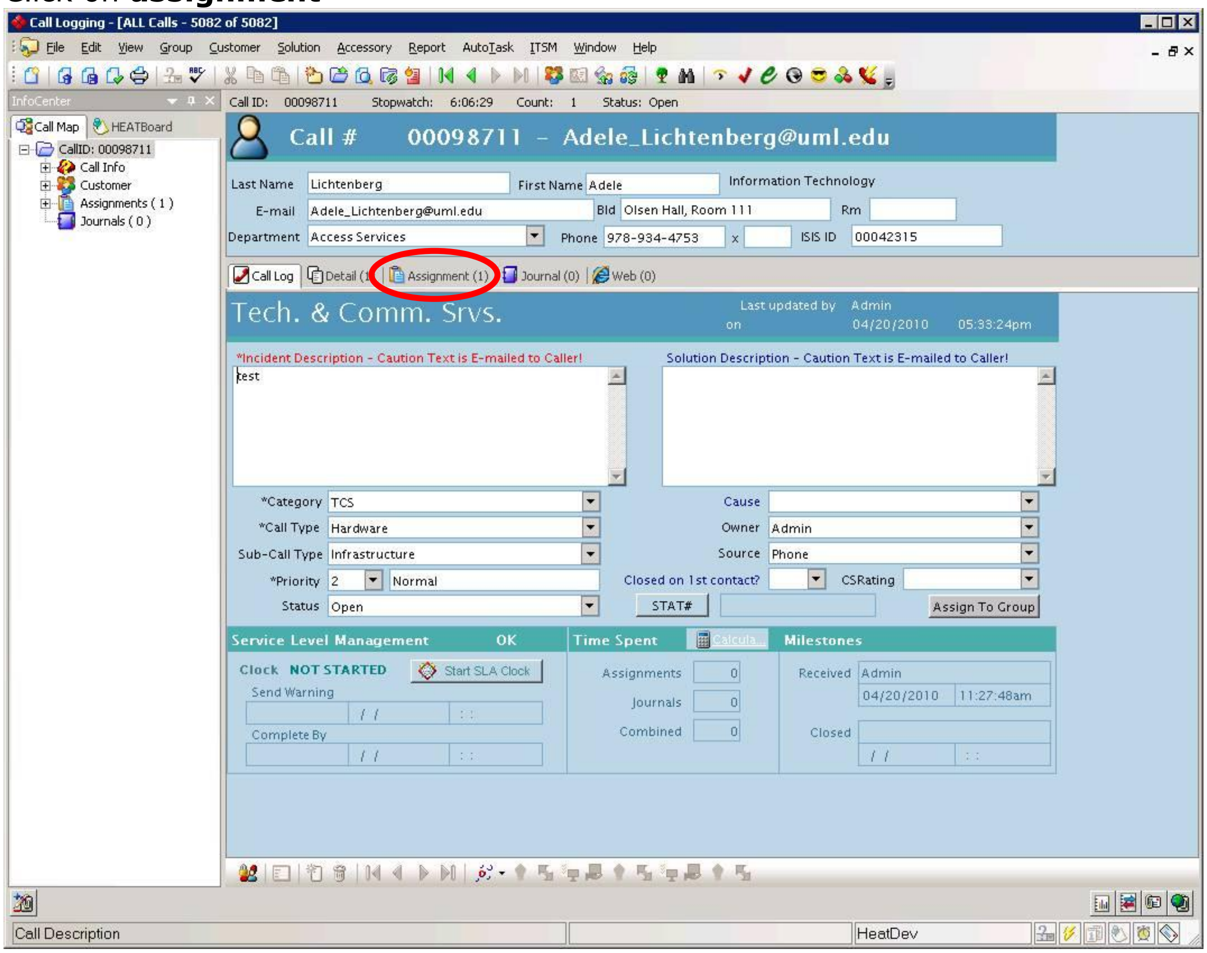
Page icon creates a new assignment

▪ Reassigning a Ticket

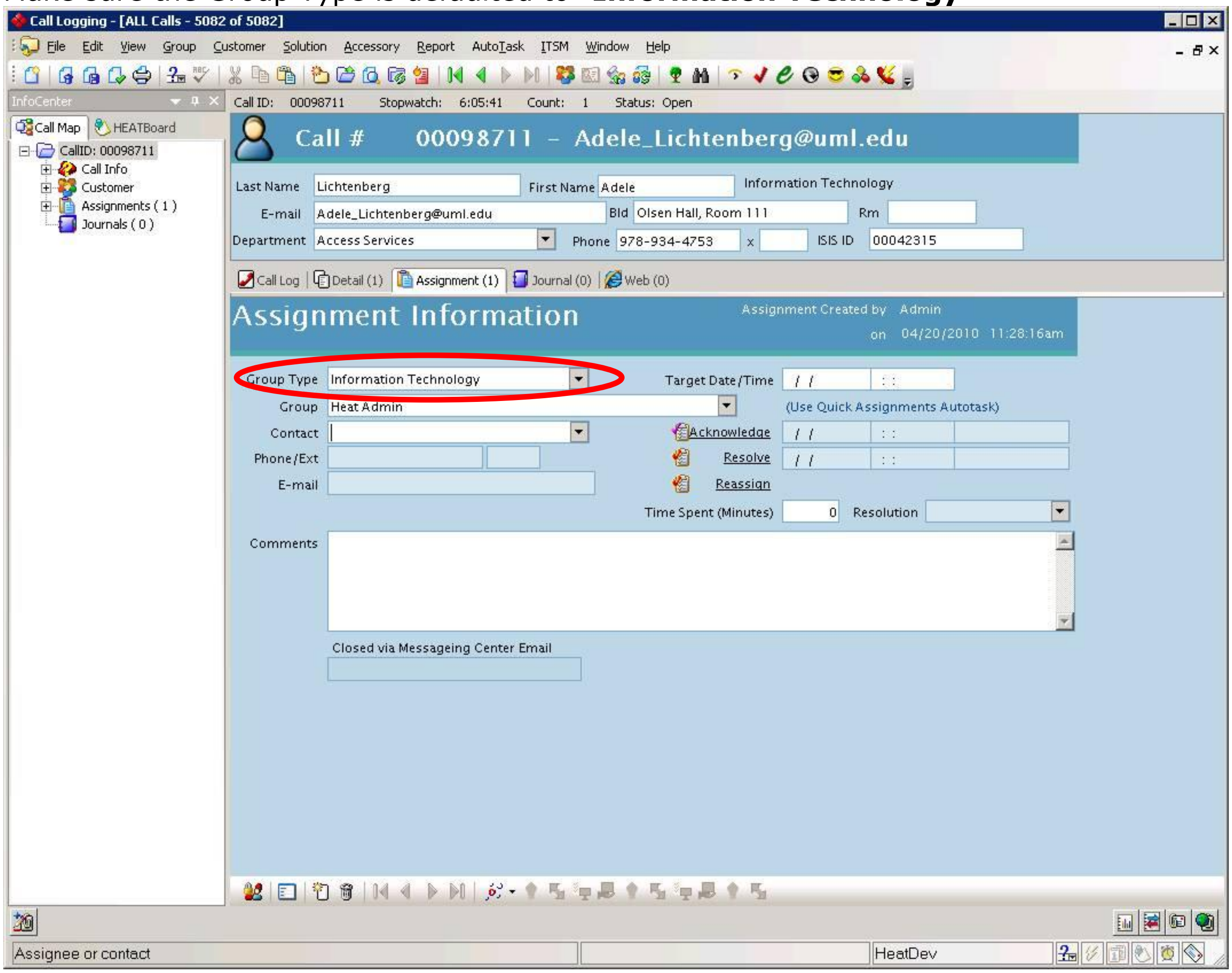
If a ticket can not be solved by Tier 1 (Help Desk) it has to be assigned to a group/department in Tier 2. Reassigning a ticket is a process that will be done at Tier 2 level by a technician if the solution for a ticket may be encountered at a different group/department. Reassignment can be done within the same group or to a different group.

Do not forget to acknowledge ticket before reassigning

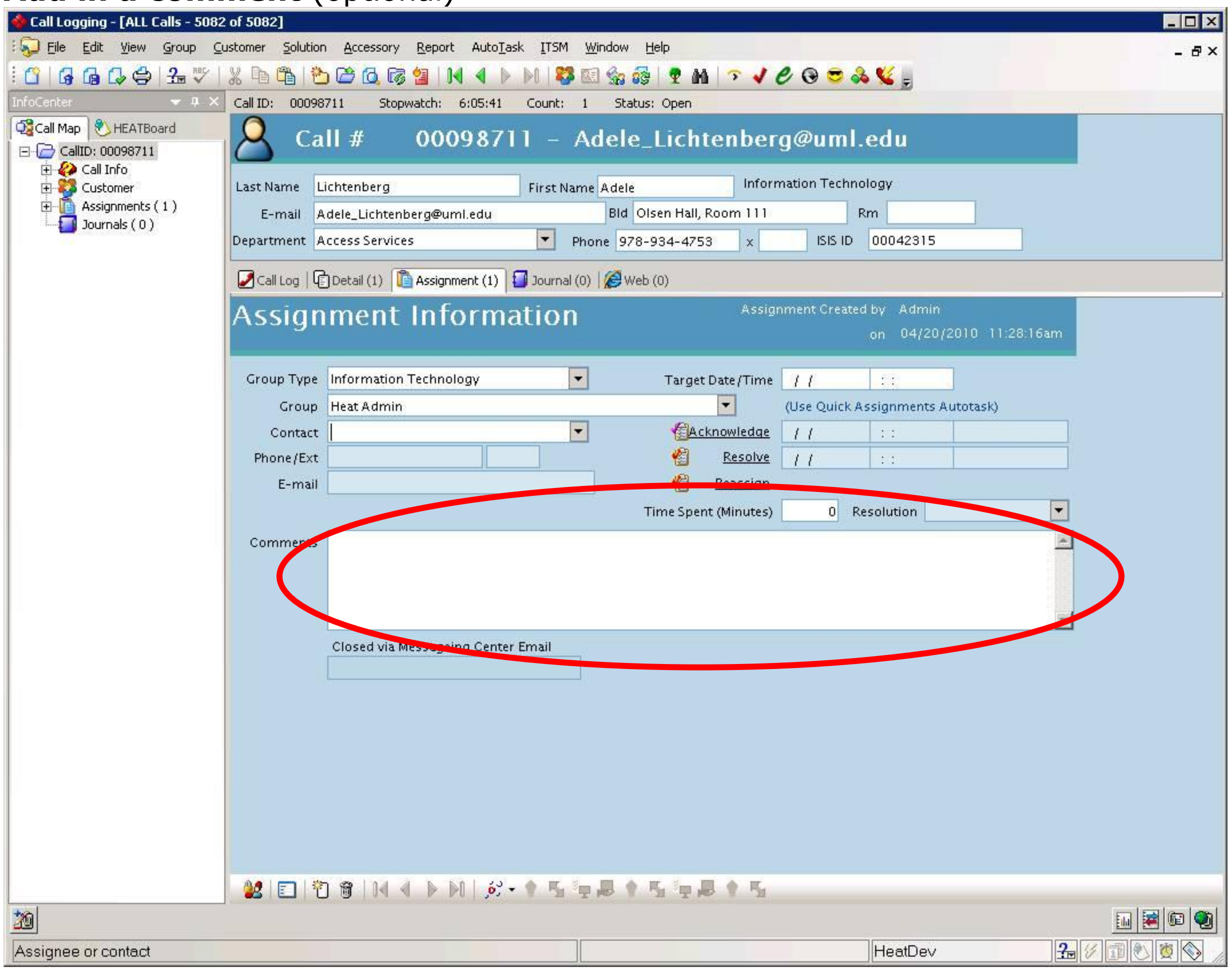
1. Click on **assignment**



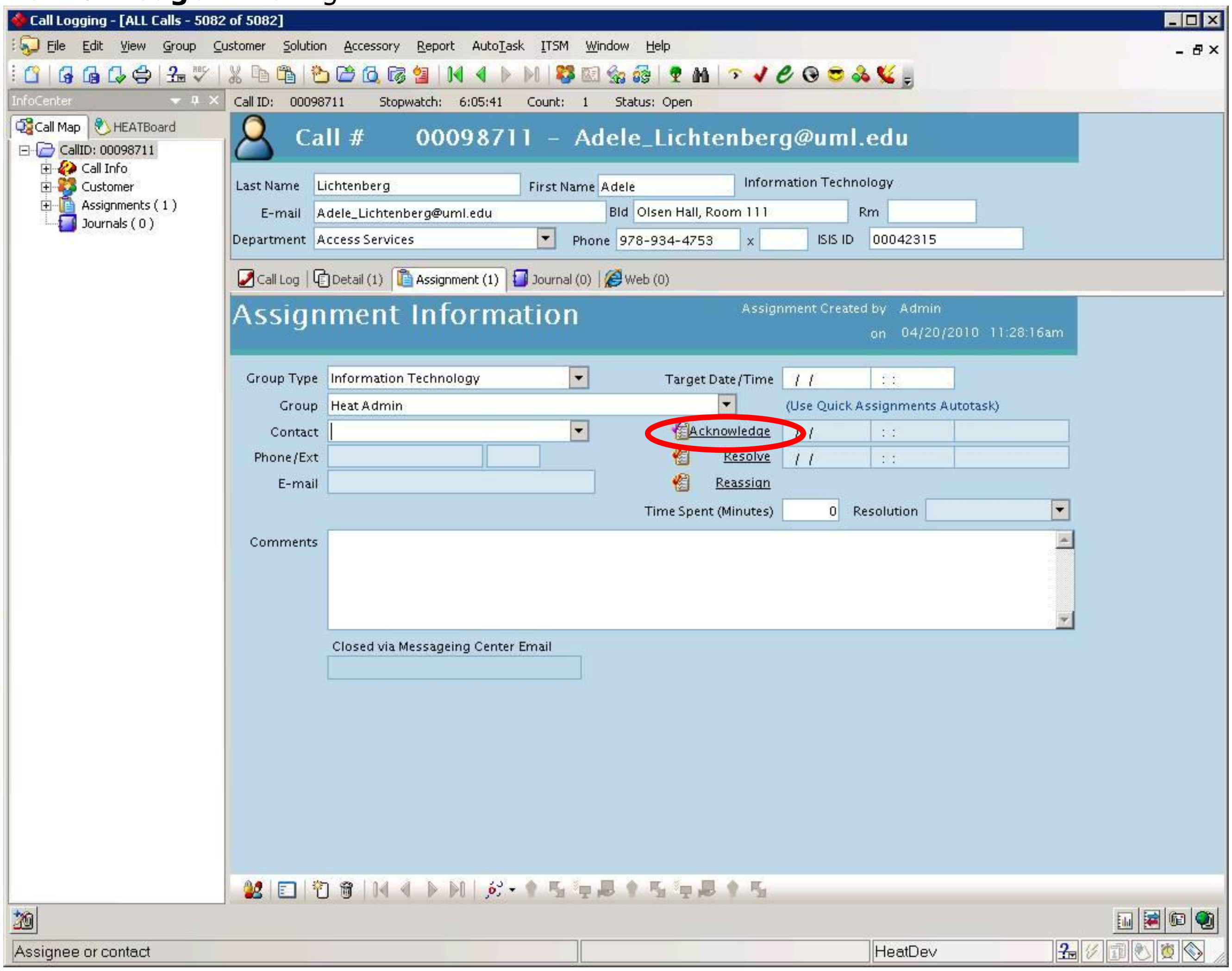
2. Make sure the Group Type is defaulted to "**Information Technology**"



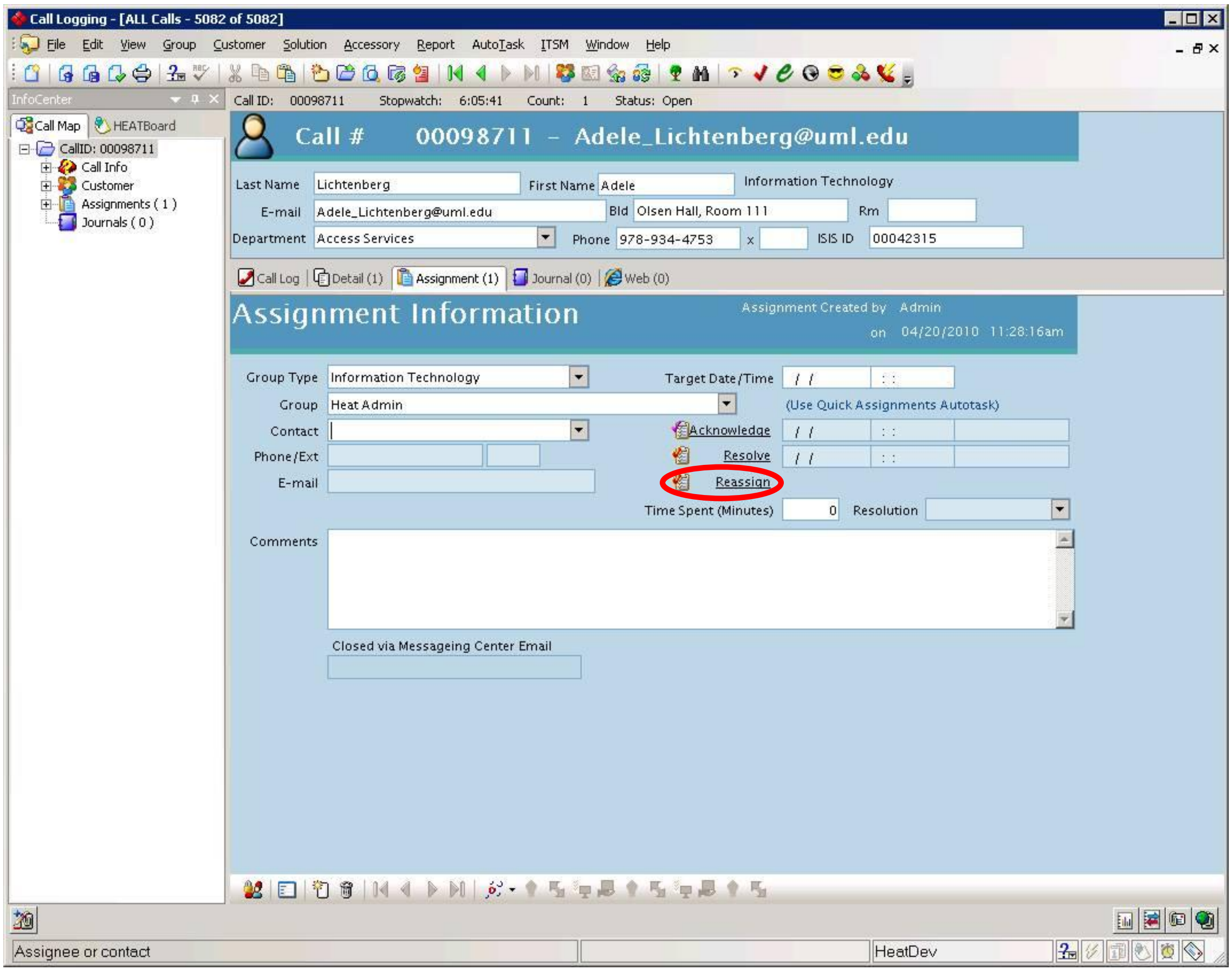
3. **Add in a comment** (optional)



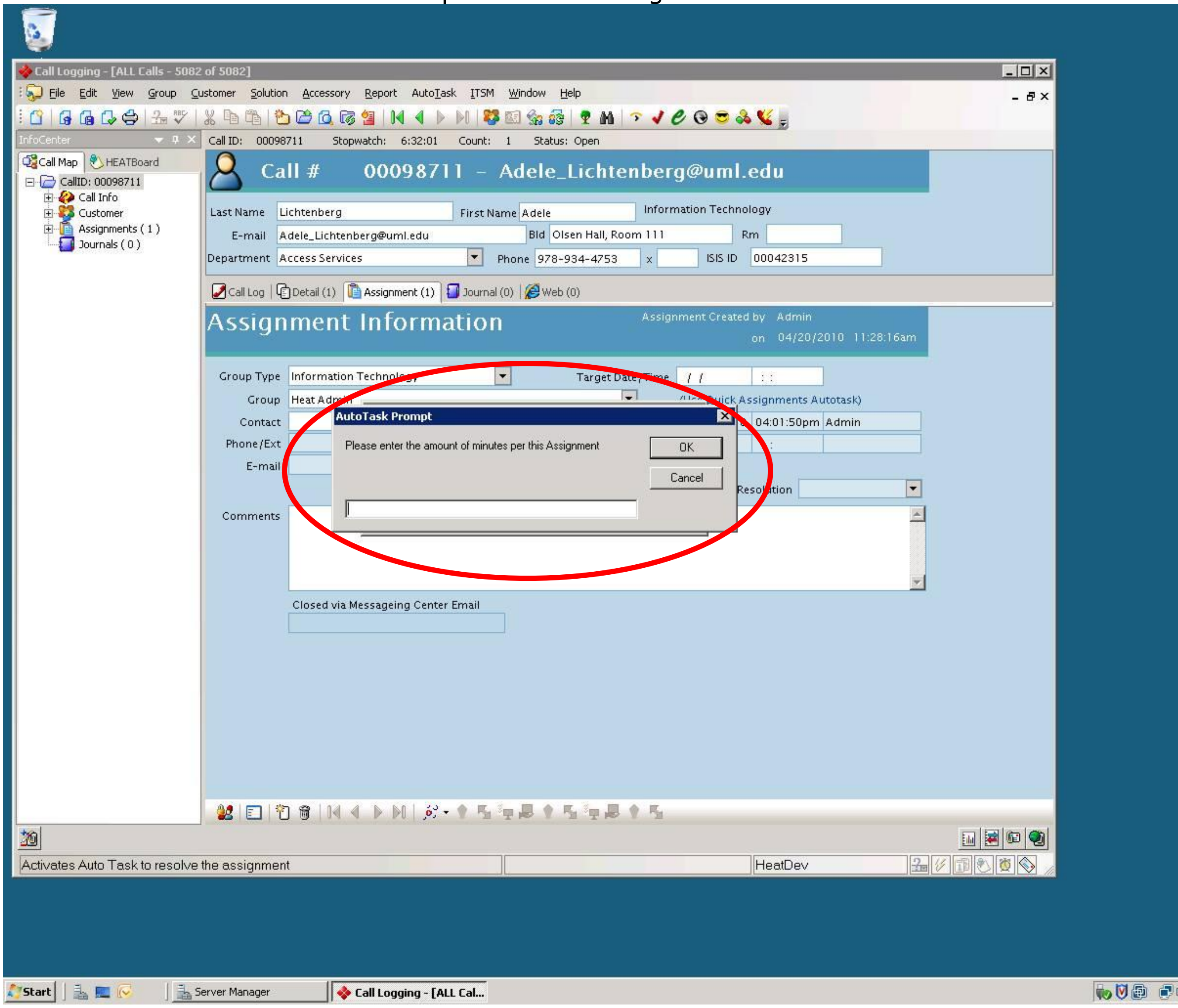
4. **Acknowledge** the assignment



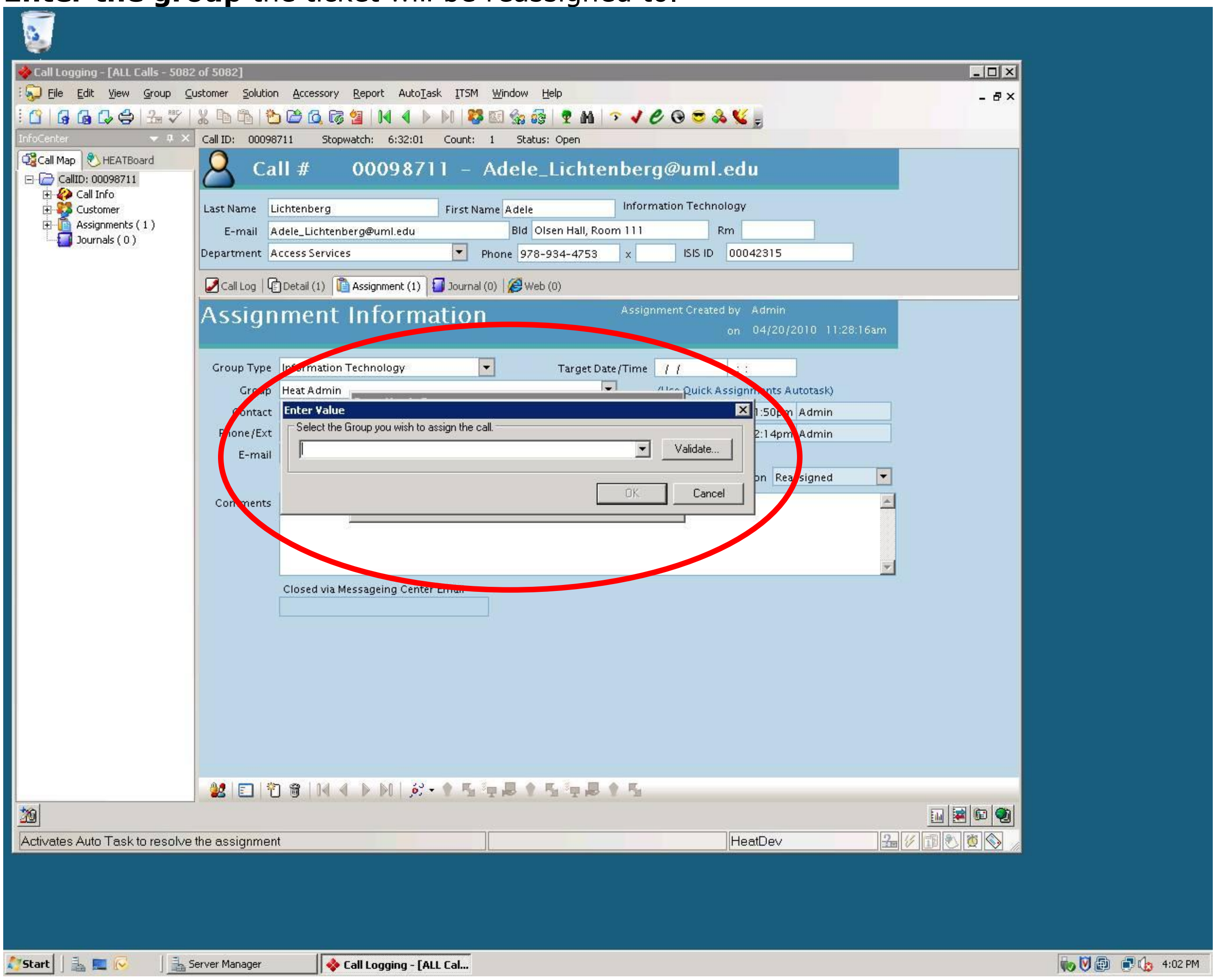
5. **Click Reassign** to reassign the ticket.



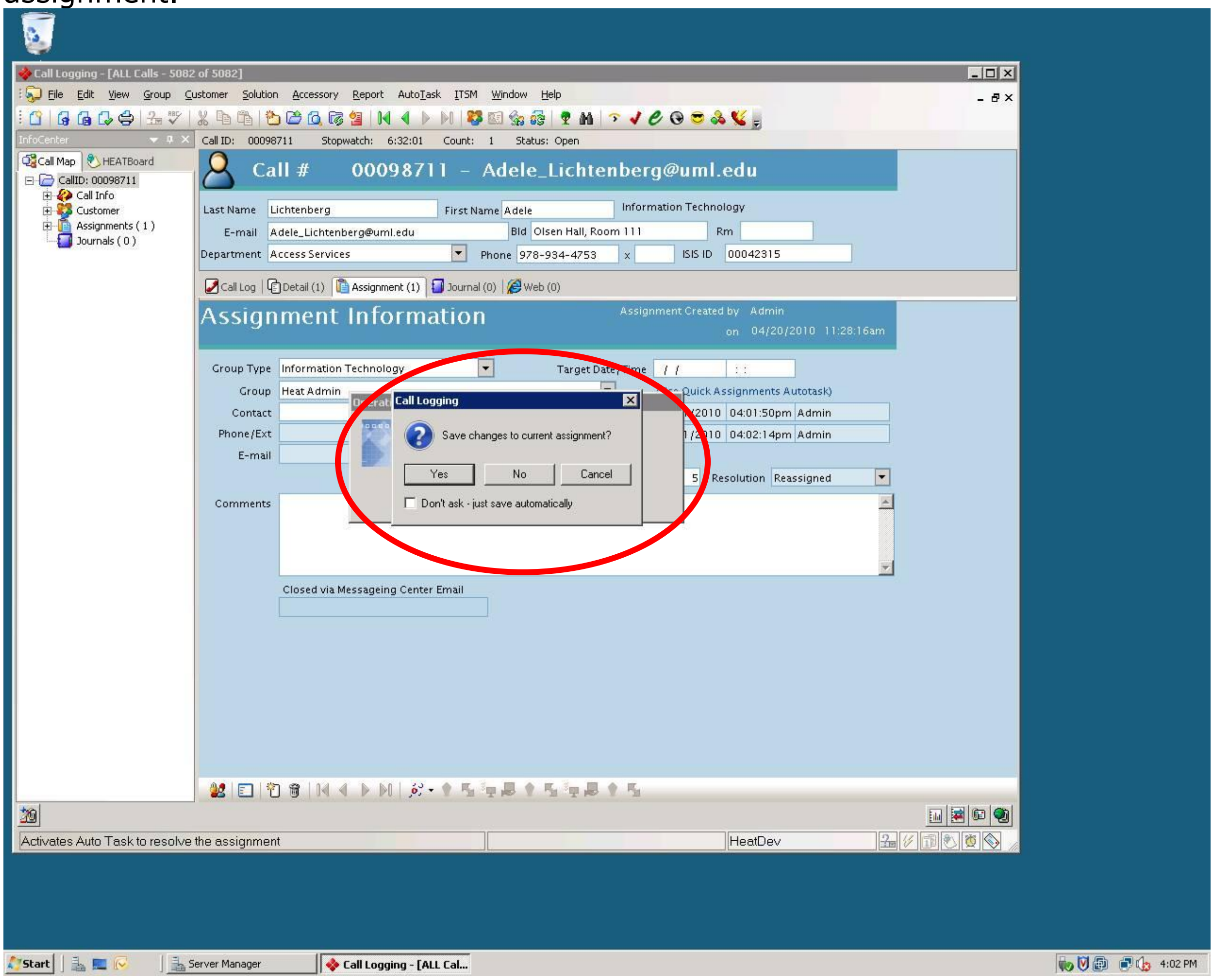
6. **Enter the number of minutes** spent on the assignment



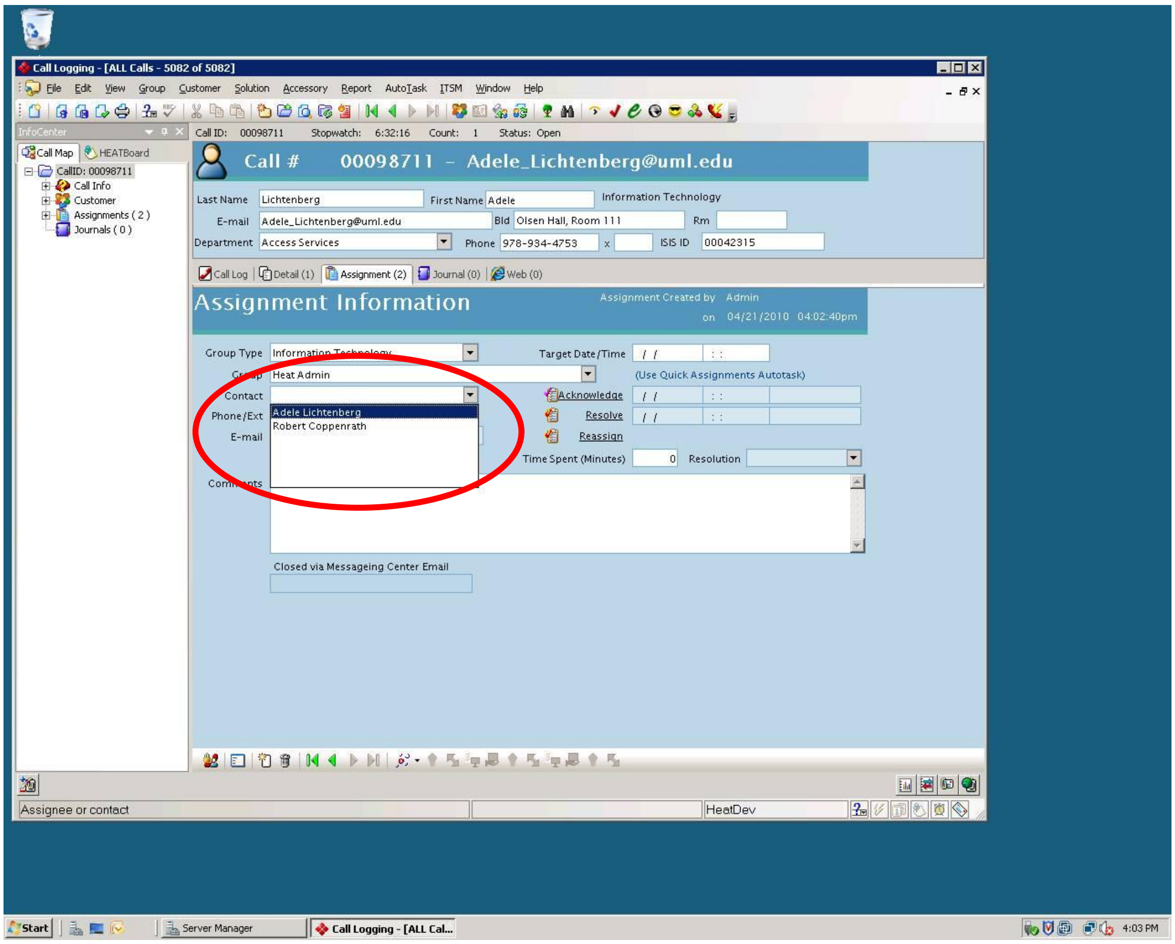
7. **Enter the group** the ticket will be reassigned to.



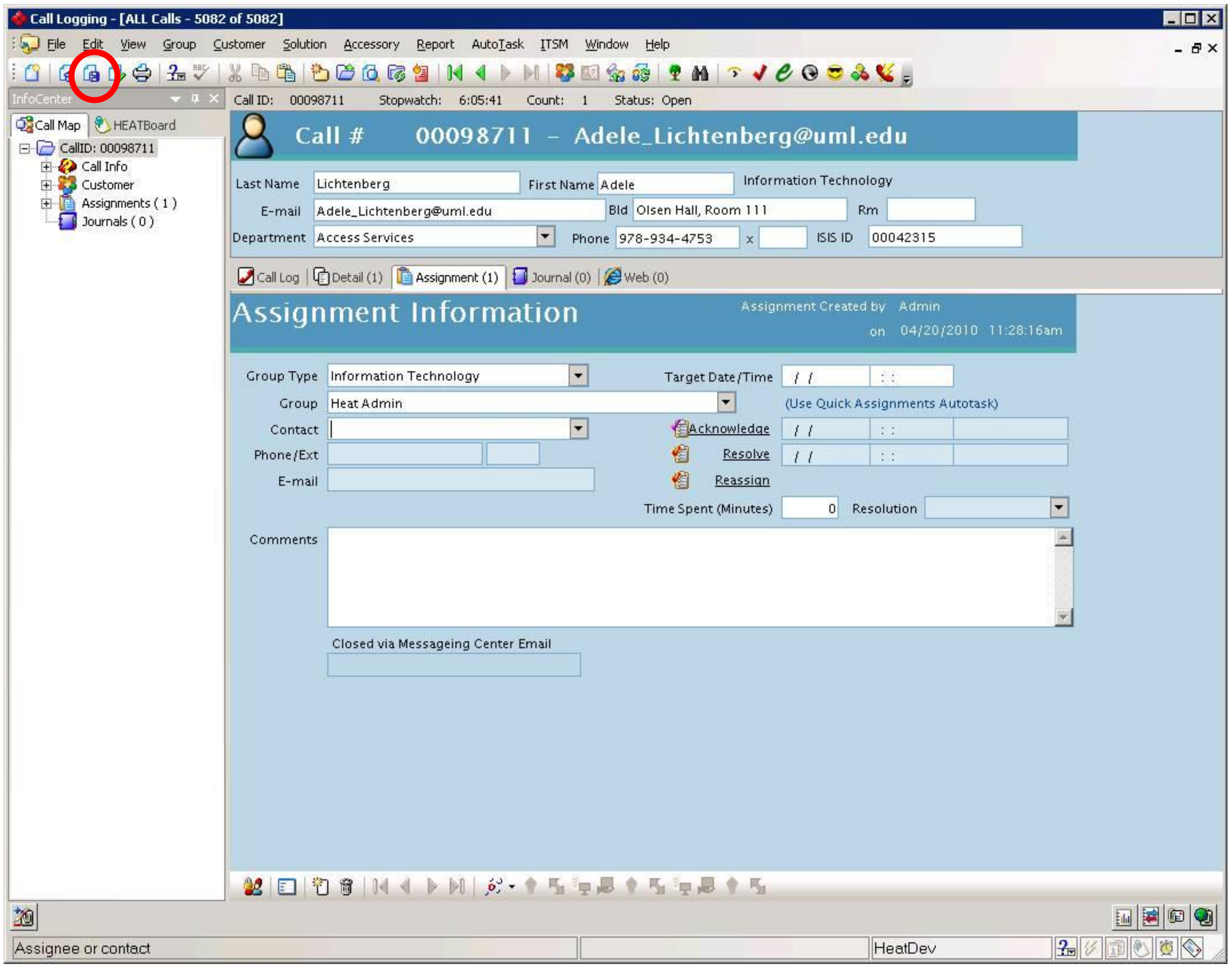
8. When the save prompt comes up, click **Yes** to **save changes** to the current assignment.



9. If you are reassigning a ticket within the **SAME GROUP**, choose the **contact** the ticket will be reassigned to.



10.**Save** the ticket



** After reassigning the tickets e-mails will be sent to customer and group to which ticket was assigned to.**

- **Acknowledging a Ticket**

After receiving e-mail notification,

1. Go to HEAT and open the ticket
2. Navigate to Assignment tab and click Acknowledge ; by clicking date and time will fill automatically

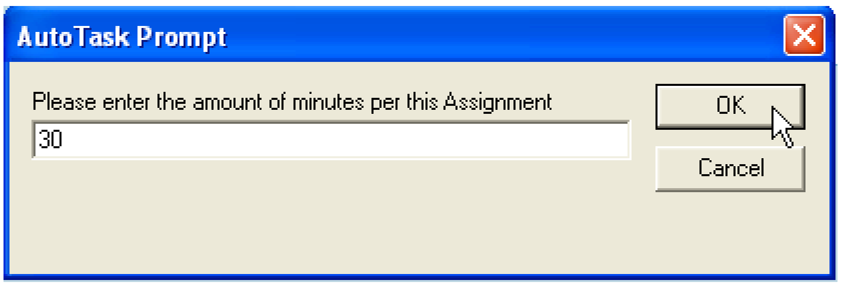
** Once ticket is acknowledged there will be a set amount of time to resolve the ticket. If ticket is not solved HEAT's e-mail system will send reminders until ticket is resolved or reassigned.**

- ### Resolving a Ticket

Once a solution has been found, go to HEAT and open the ticket,

1. Navigate to **Assignment** tab and click **Resolve** 

2. On the empty field box enter the amount of time in minutes that it took to solve; click **OK**



3. Click on the **Save Call Record** icon 

- ### Escalating To Tier 3

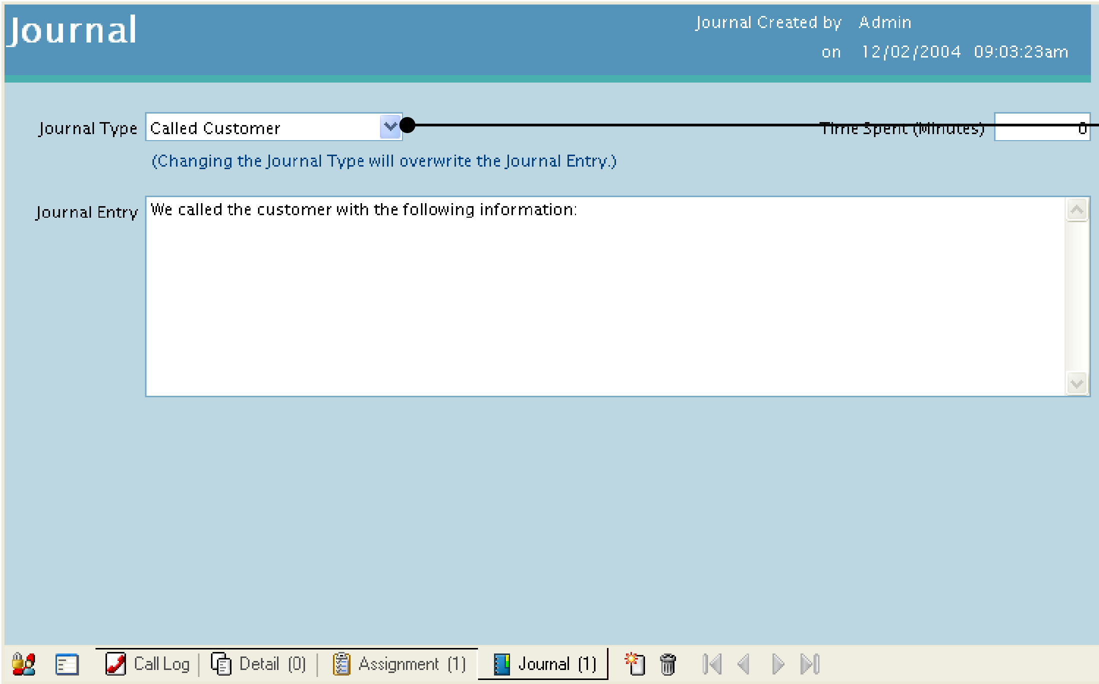
If ever needed to escalate to tier 3 please contact the Help Desk at X4357 and they will take care of this procedure for you.

Journal Screen

With the Journal, you can record details about a user's call, technician actions on the call, and other information. A single Call Record can have multiple journal entries.

Create a Journal Entry

Click the **Journal** tab, right-click the **Journal** screen, select **New Journal Entry**, type journal information in the Journal Entry field.

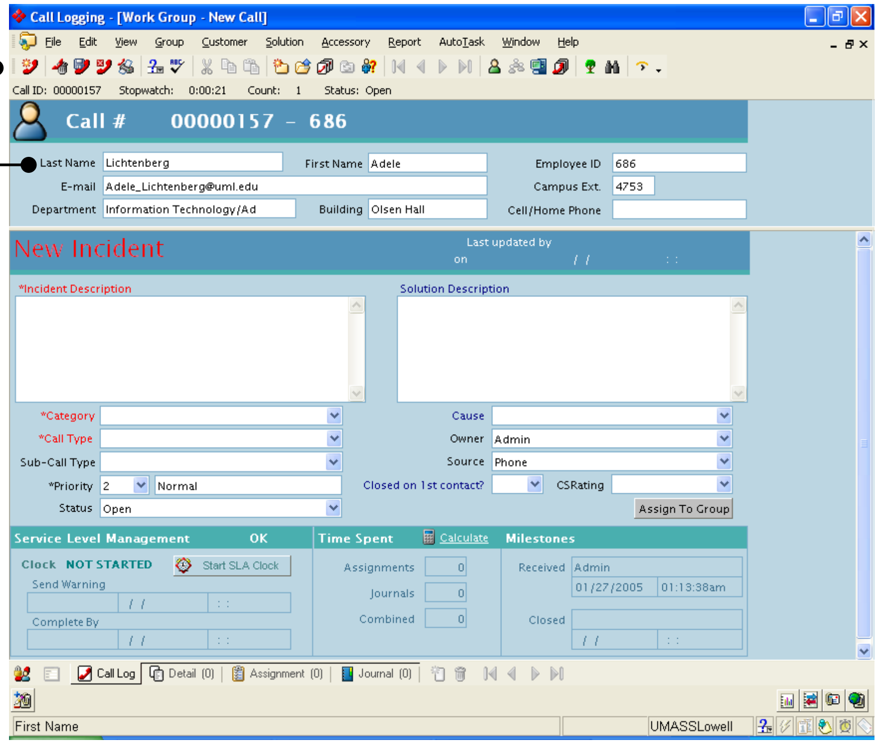


Use the Quick Journal drop-down to save time entering commonly used notes

Creating a New Ticket in HEAT

Click on the New Call icon  on the left end of the toolbar. You can now select a customer type by pressing **Ctrl T**

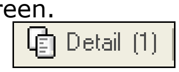
Last Name click into a field and type all or part of the name. Hit F9 or the Tab key and if the name is unique, it will auto-fill into the top of the ticket. If there is more than one match, a pick-list will appear. NOTE: this only works for employee customer type.

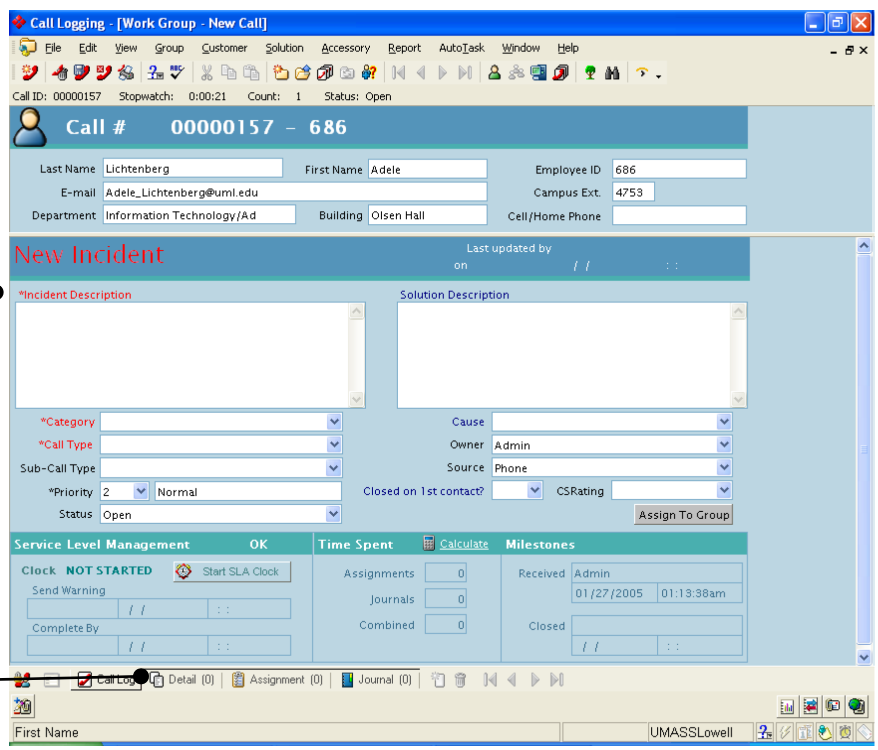


Incident Description completes the Call log screen by filling out the Call Description and selecting the Category.

Select the appropriate Call Type & Sub Call Type.

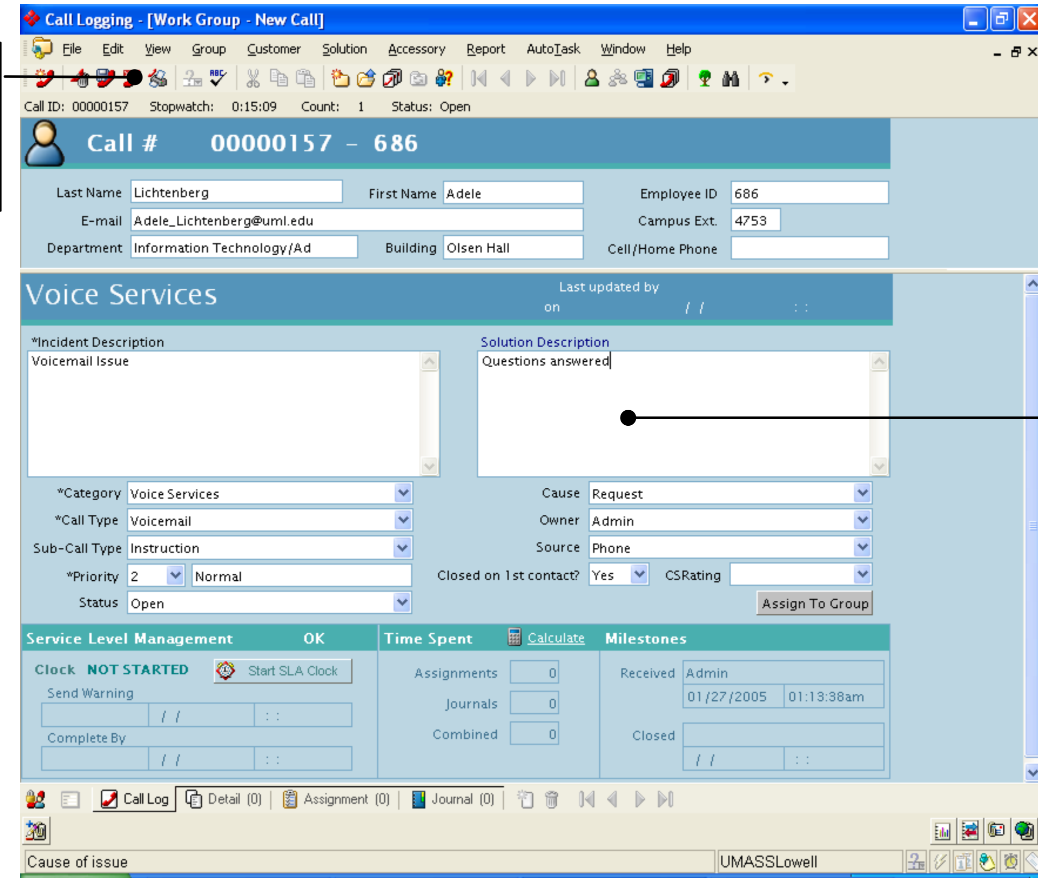
Detail Tab some Call Types have Detail screens attached to them. If a 1 appears on the tab, click on the Detail Tab and fill out the Detail Screen.





Create Assignments and Journals if necessary. Click Save  when done.

When the ticket has been completed, click **Quick Close** icon  when done.



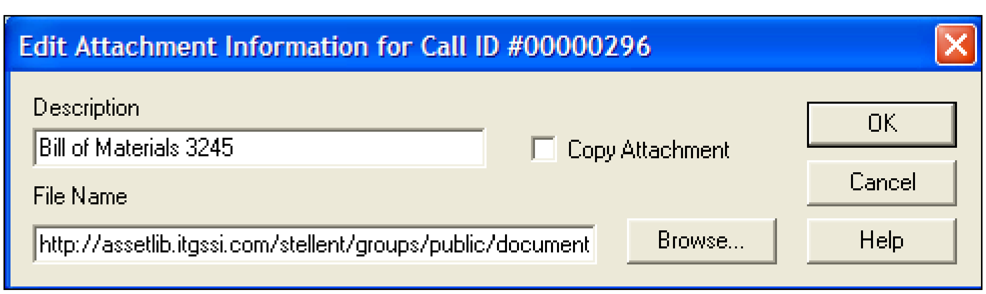
Solution Description
Complete the Solution Description, Cause and any other necessary fields.

Quick Close  *is only intended to be used when the ticket is* ***done/solved*** and status is closed. ***Quick close*** *will automatically mark ticket closed, it will also send emails reporting status.*

UMass Lowell's HEAT system has certain fields that are required. HEAT will prompt you if these are not completed. An example of this would be in order to Close a call, you would need to select "***Close***" for the call "***Status***" but also need to complete the "***Solution Description***" section as shown above

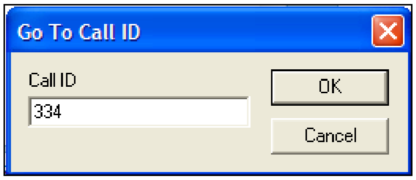
Attaching a Document to a Ticket

To attach a document, click on the paper clip on the bottom left corner of the ticket. Name the attachment and insert the path.



Finding a Ticket by Ticket Number

Log into HEAT and select "Control G" to "Go to" the record. The number for each ticket is unique and will be provided in the email that gets sent once a ticket is entered.

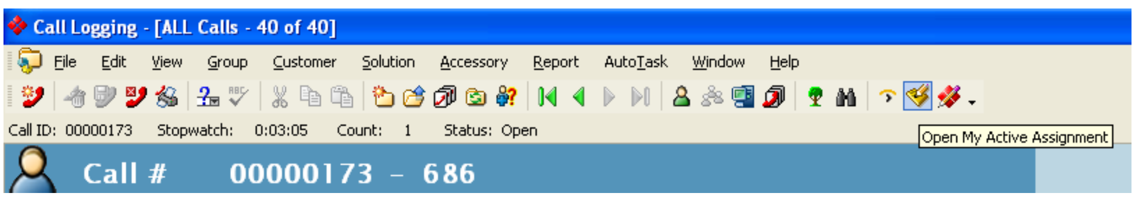


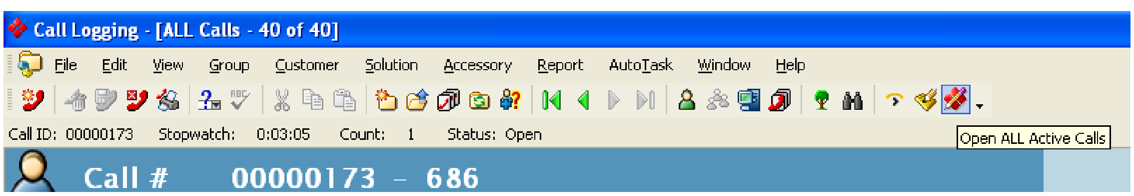
Enter the ticket number and select OK.

Call Groups

The HEAT system can display Records in Call Groups (filters). All Records in a Call Group have similar characteristics. For example, if you queried the HEAT system to show all Call Records that have an Open Call Status, the result would be a group containing all the open records.

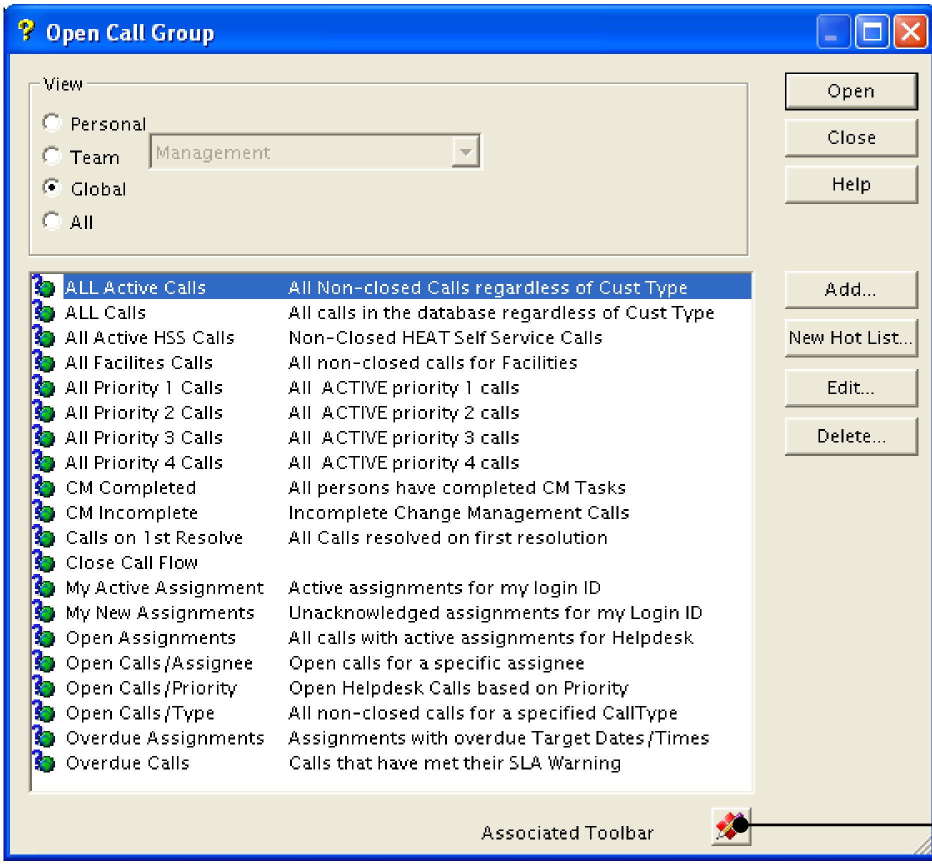
A shortcut to frequently used Groups can be placed on the toolbar. Most users will find certain Call Groups such as **My Active Assignments** and **All Active Calls** on their toolbar when they log in.





Global Call Groups

Some Call Groups have been built for all HEAT users to have access to. These are called Global Call Groups. In Call Logging go to Group/Open Call Groups and select Global.



Click the **Associated Toolbar Button** to choose an icon to place on your Toolbar that will open the selected Call Group.

Frequently used Call Groups include:

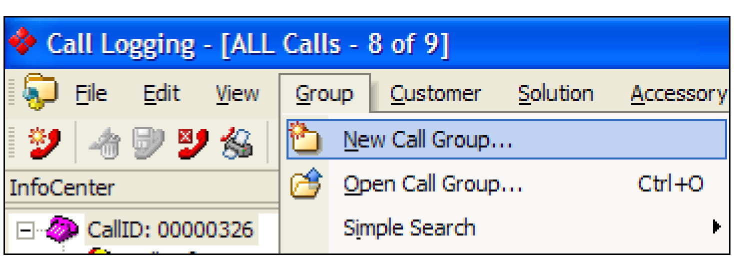
My New Assignments – Tickets with an assignment to you (the logged in HEAT user) that has not yet been Acknowledged.

My Active Assignments - Tickets with an assignment to you (the logged in HEAT user) that has been Acknowledged but is not yet Resolved.

There may also be some Call Groups built for your team, and you can also build Call Groups for your personal use.

Creating a New Call Group

In this example we will create a Call Group for all Open Computer Security calls.



To create the new Call Group select Group and then click New Call Group.

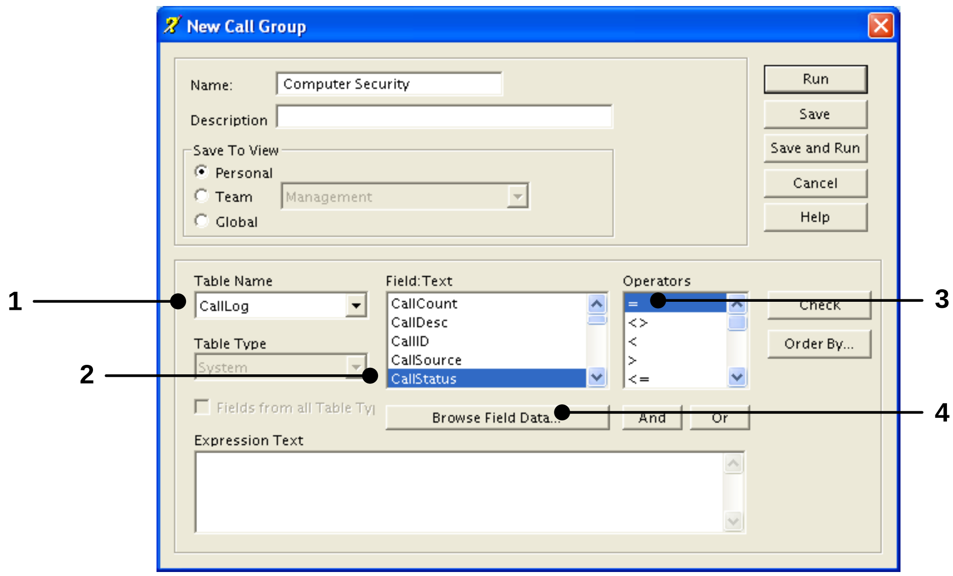
Give the Call Group a name such as “Computer Security”.

Next, an expression will be built by selecting tables, fields and operators.

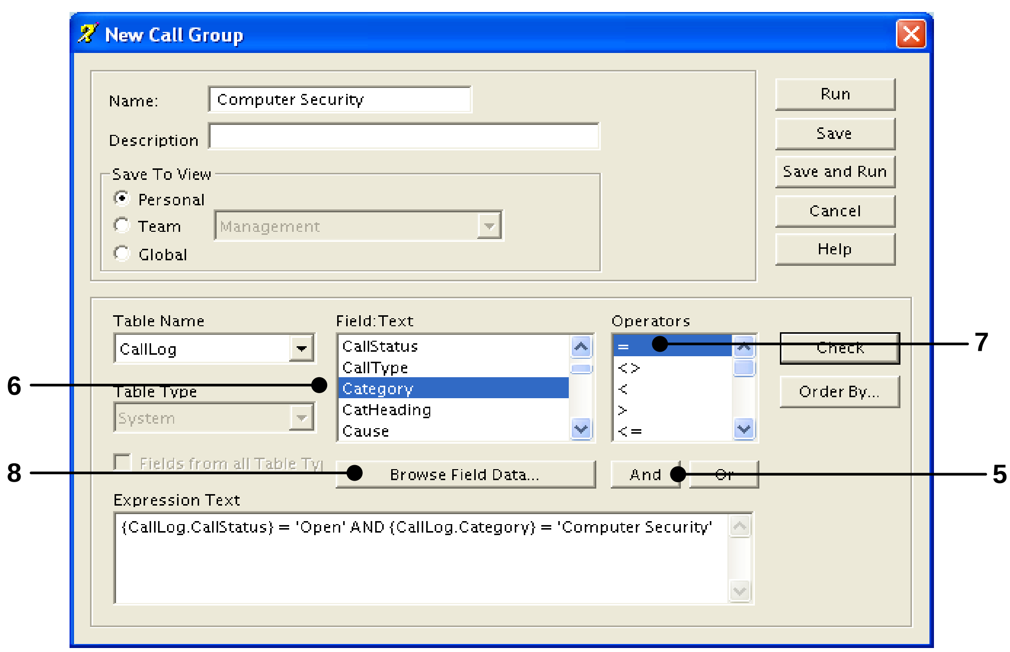
We are interested in calls where the Call Status is "Open" and the Category is Computer Security. Both fields are on the Call Log screen and reside in the CallLog Table.

Follow steps 1-8 below.

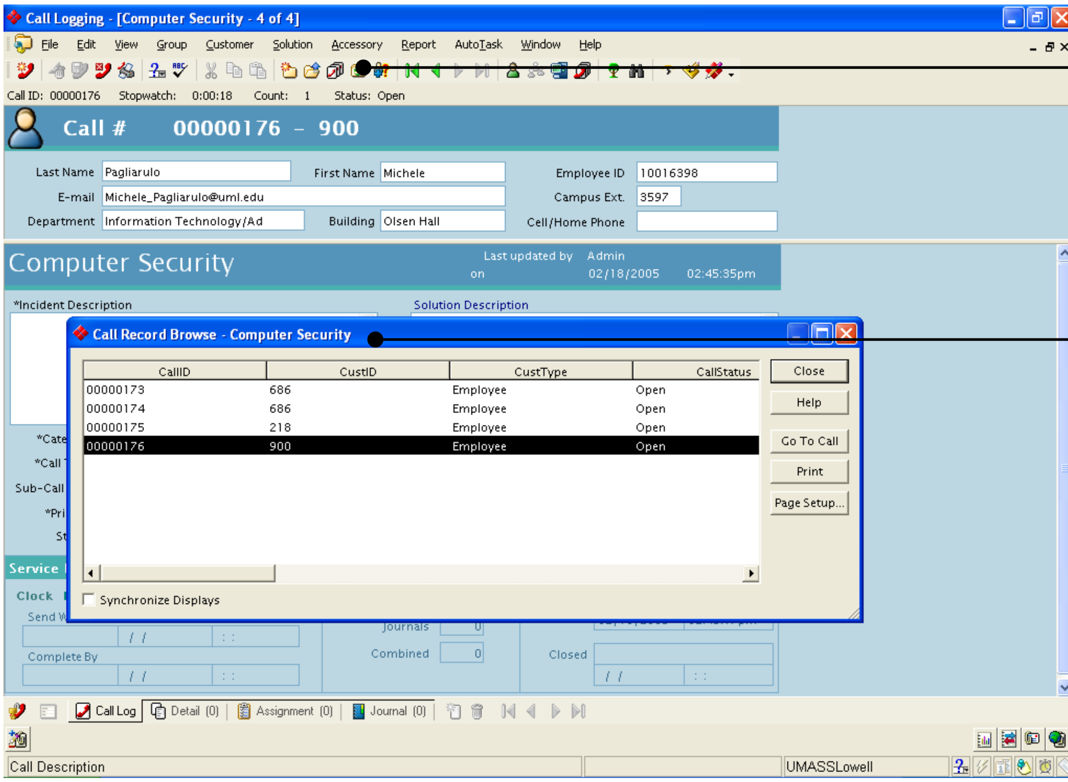
1. Select the CallLog Table from the Table Name drop-down
2. Select and double-click the CallStatus Field
3. Select and double-click the = sign
4. Click Browse Field Data and select Open



5. Click the AND button
6. Double-click the Category field
7. Double-click the "=" sign
8. Click Browse Field Data and select Computer Security



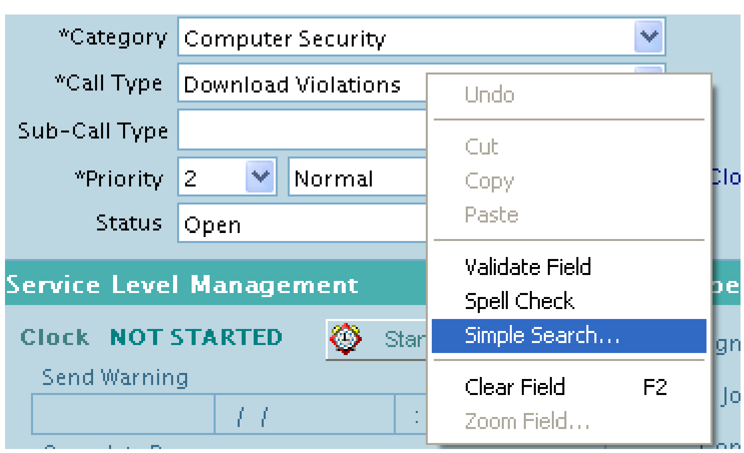
- Once you save this Call Group it will be available to you from the Call Group list. To open this Call Group, select Call Group > Open Call Group.
- Once opened, there are several ways to navigate through the filtered data
- The top bar indicates which Call Group you are working in and the number of calls in that group
- To see the individual tickets you can page through them using the **green** arrow keys



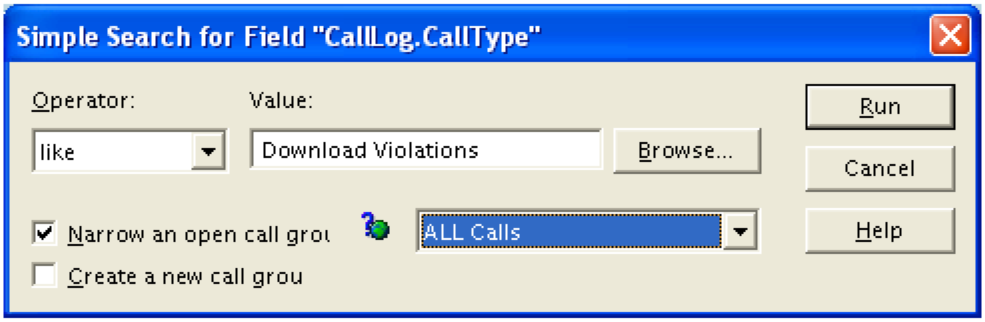
If you would like to view this Call Group in a list, click  Call Record Browse icon on the toolbar. When Synchronize Displays is checked the Record in the background changes when you select a ticket in the grid.

Simple Search

In addition to creating Call Groups, you can build "ad-hoc" groups using the Simple Search tool. Right-click in any field and select Simple Search.



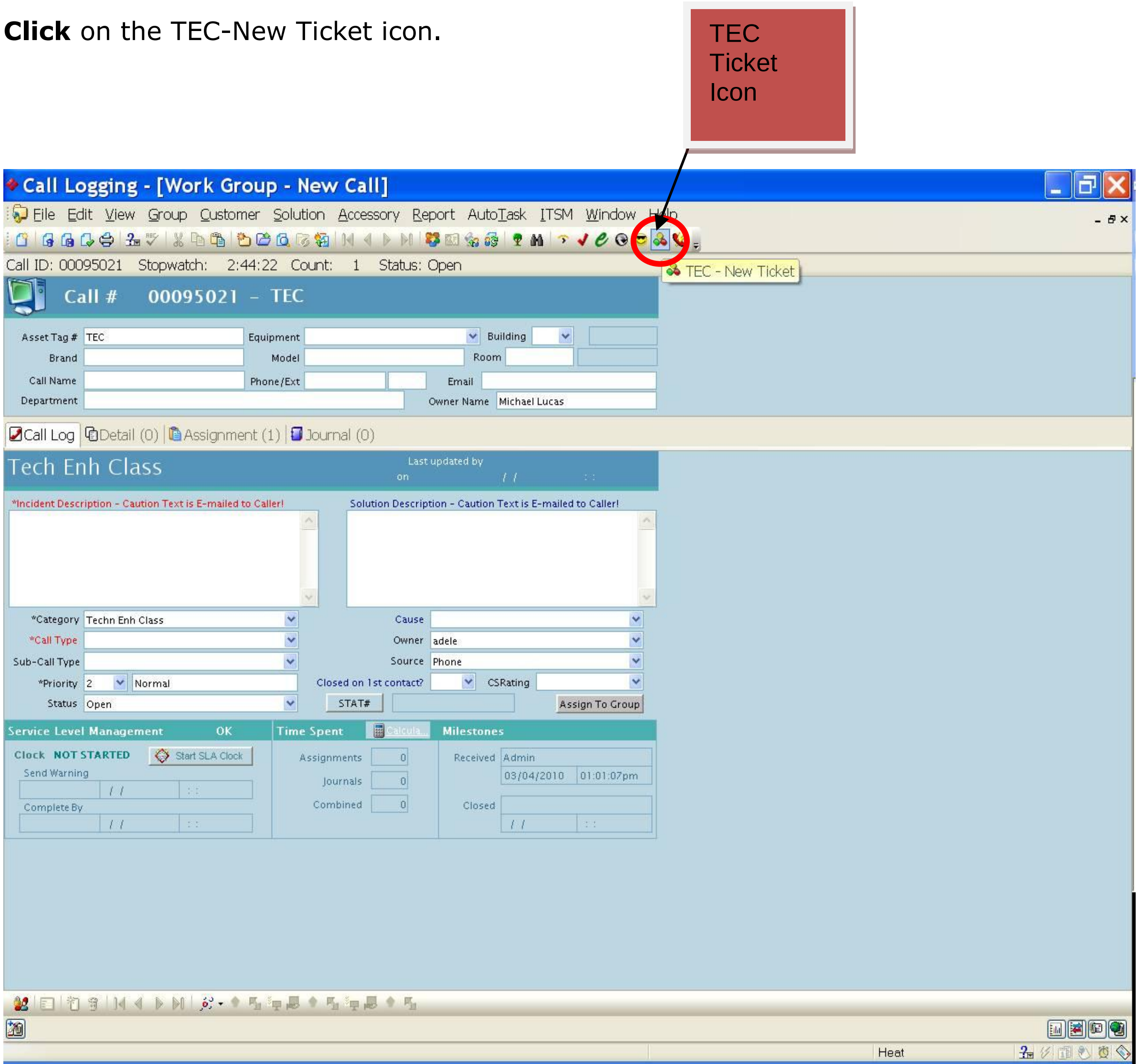
This will allow you to search the ticket database for tickets that have certain value(s) in a field.



After you run a Simple Search, you can narrow this group by performing another Simple Search in a different field.

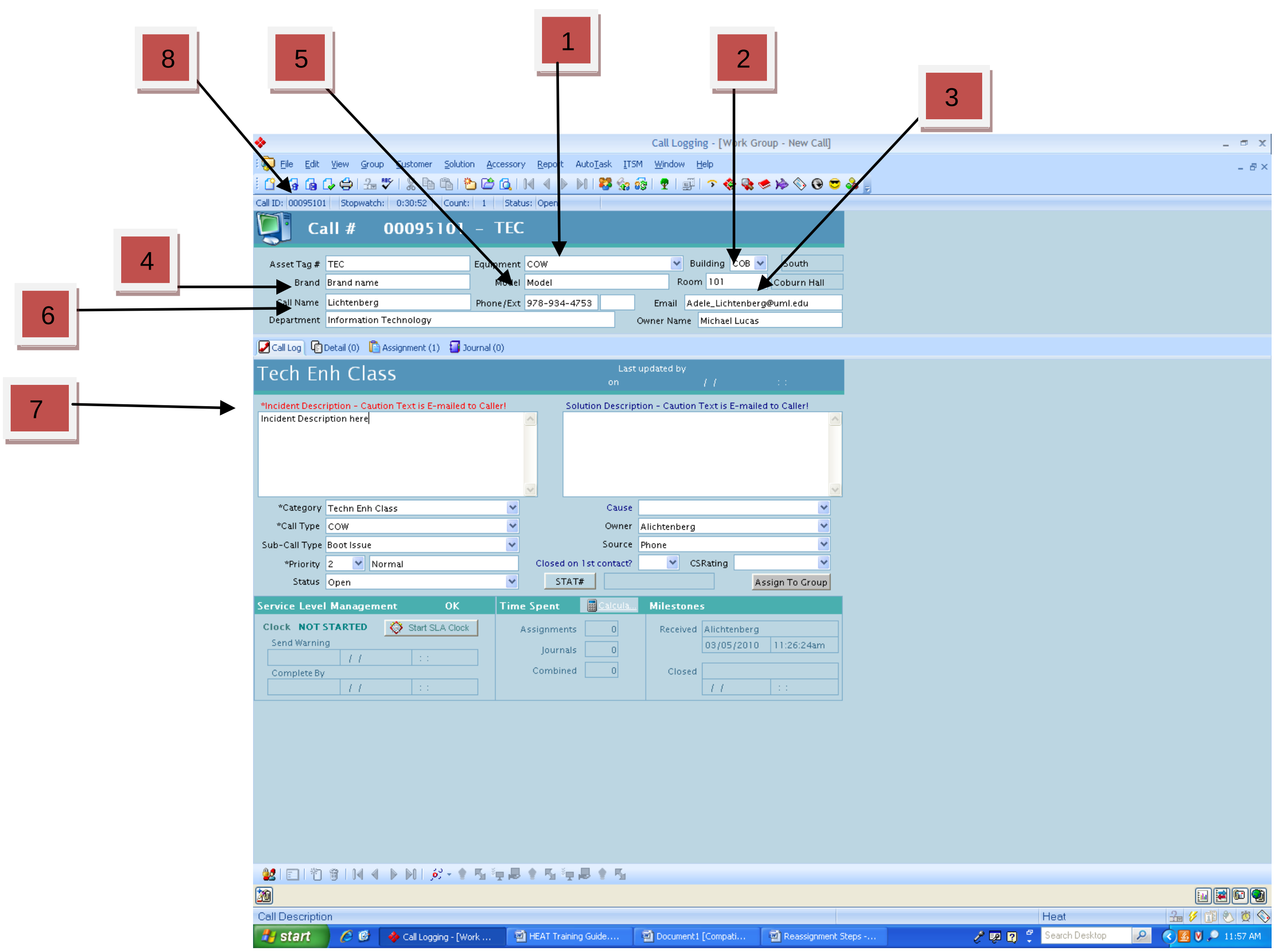
Creating a Technology Enhanced Classroom (TEC) Ticket

Click on the TEC-New Ticket icon.



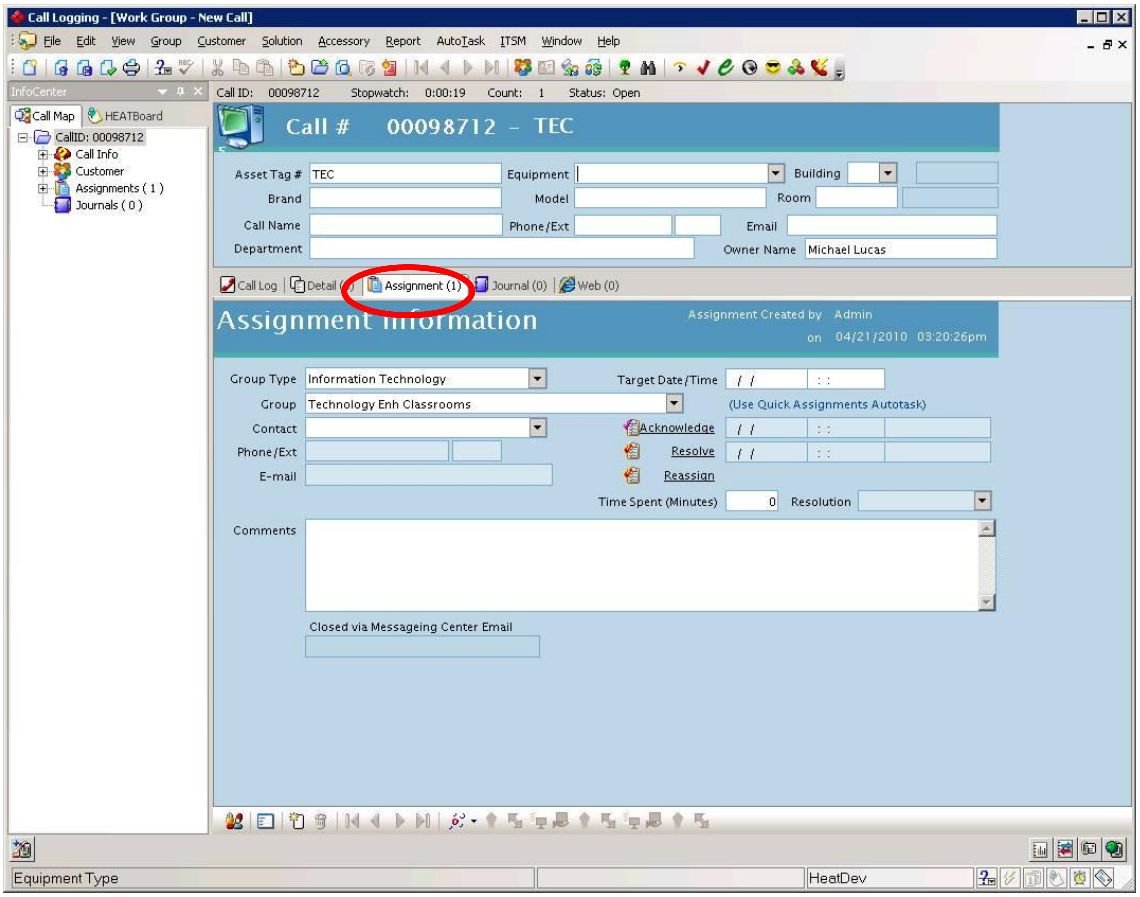
Fill in the following Fields:

1. **Equipment**- Choose the type of equipment
2. **Building**- Choose the building where the equipment is located.
3. **Room**- Enter the room number that the equipment is located in.
4. **Brand**- Type in the brand name of the equipment
5. **Model**- Type in the model of the equipment
6. **Call Name** Click into the field and type in all or part of the last name. Then hit the Tab key. If the name is unique, it will auto-fill in the call name. If there is more than one match, a pick list will appear to choose the appropriate person. When the name is entered, the phone, department, and email field will be auto-filled.
7. **Incident Description** Enter a description of the problem. The Category description should already be filled in with "Techn Enh Class." Select the appropriate Call Type & Sub Call Type.
8. **Save Call**

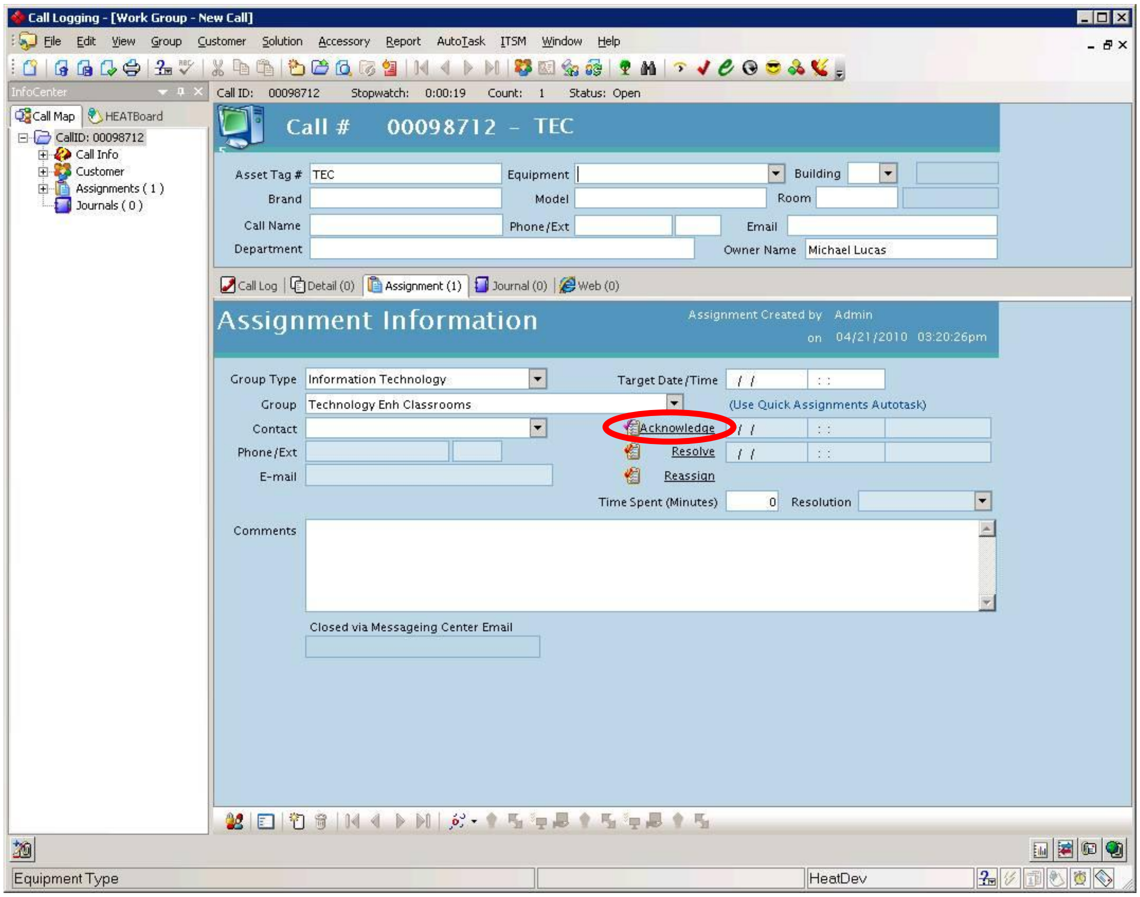


To Reassign a TEC Ticket

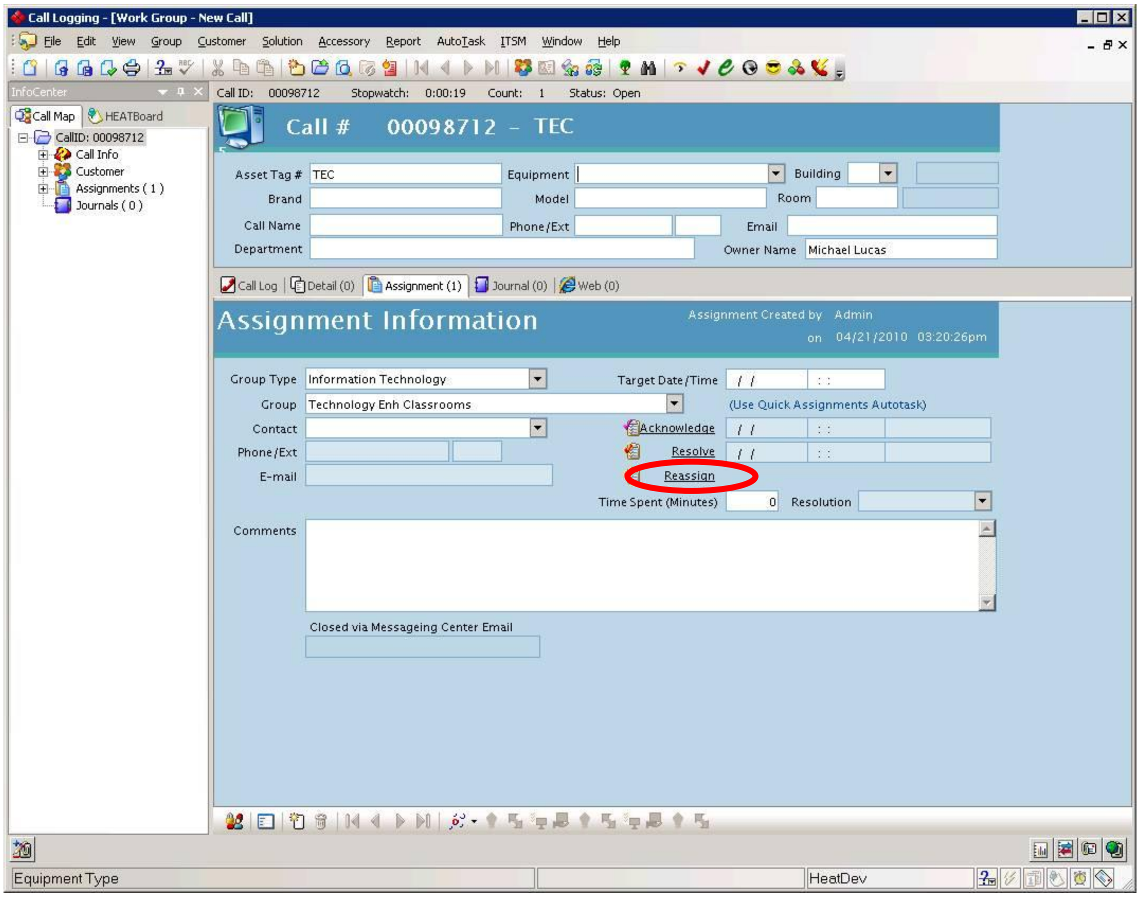
1. Click on the Assignment tab.



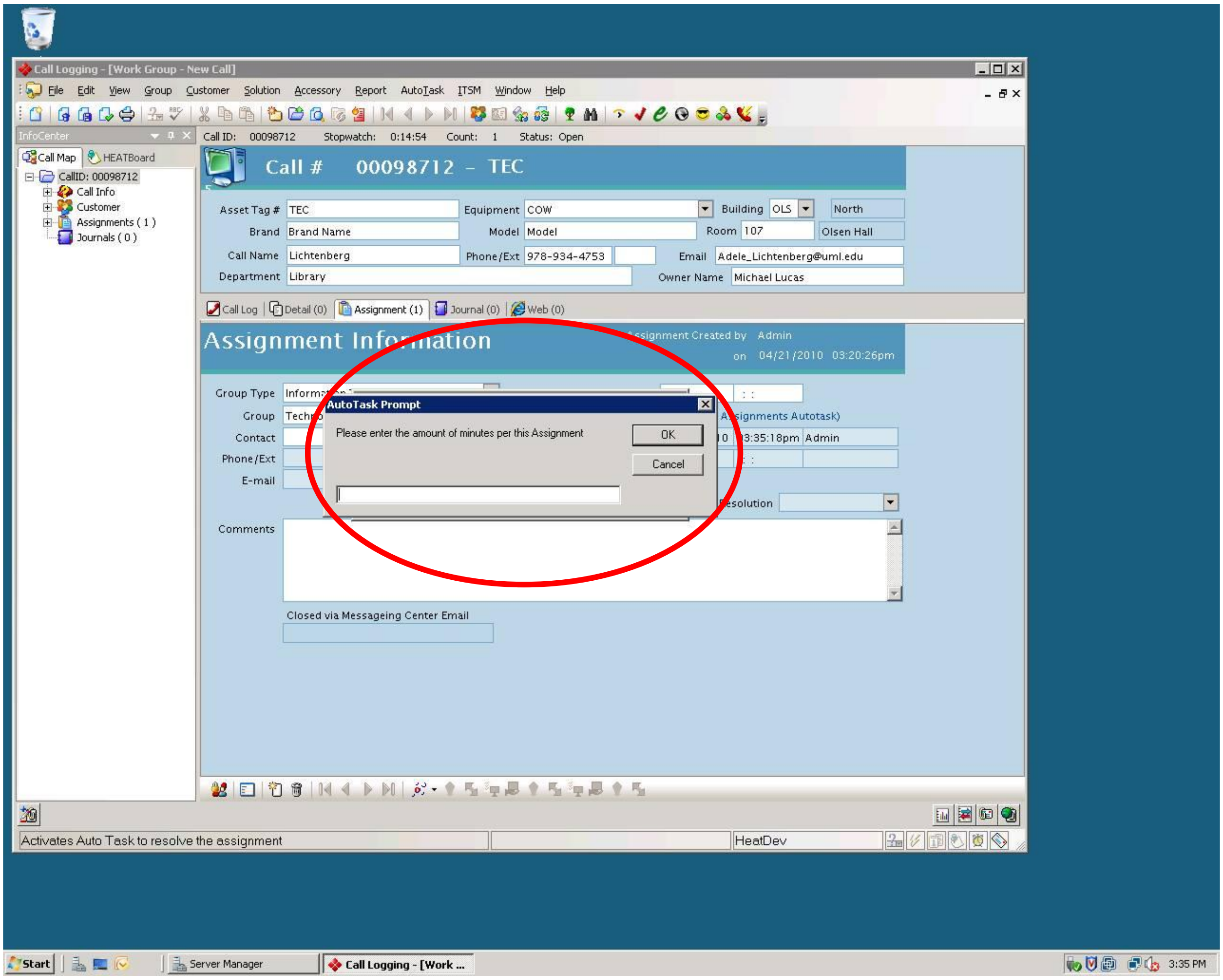
2. Click "Acknowledge" to acknowledge the assignment.



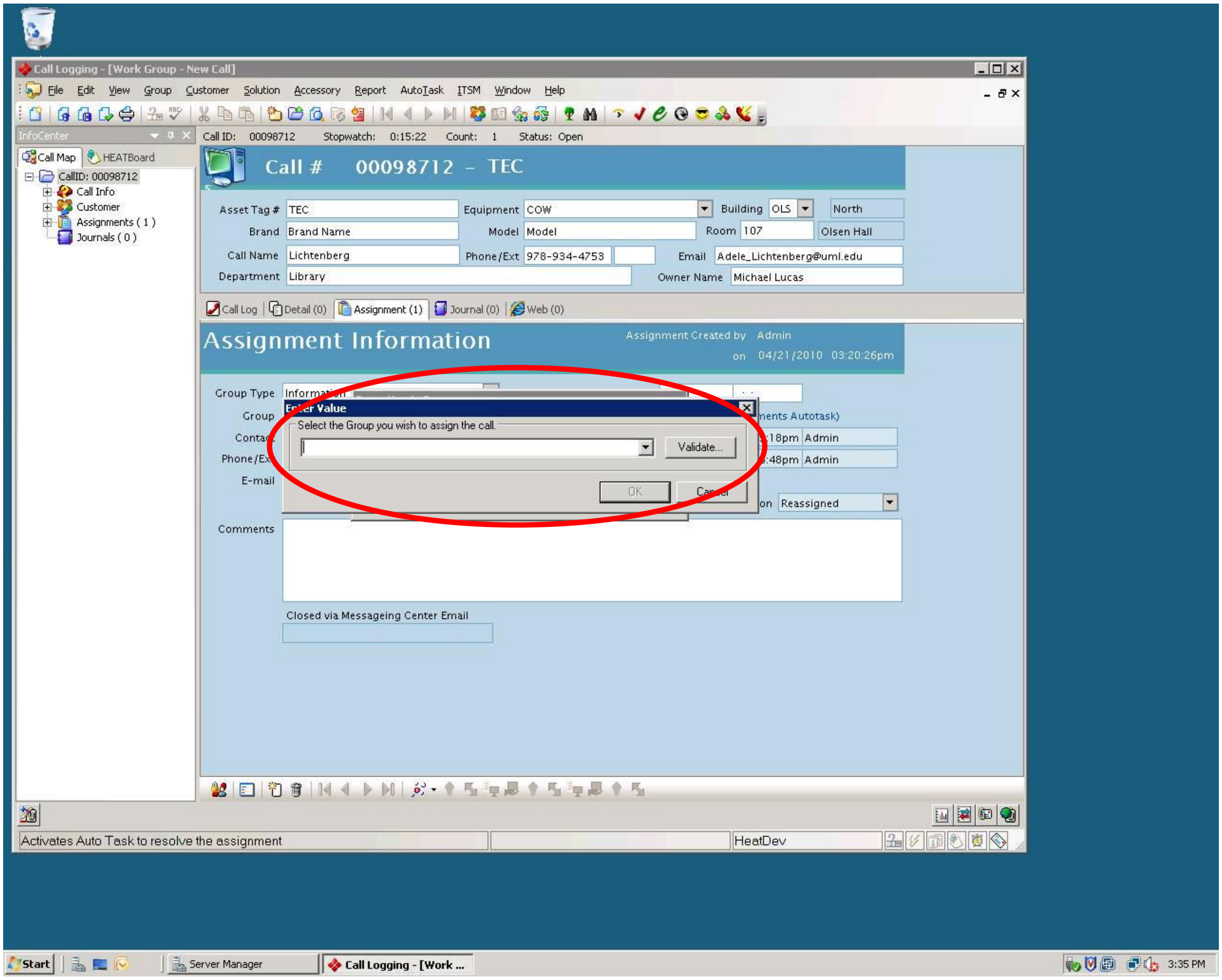
3. Click “Reassign”



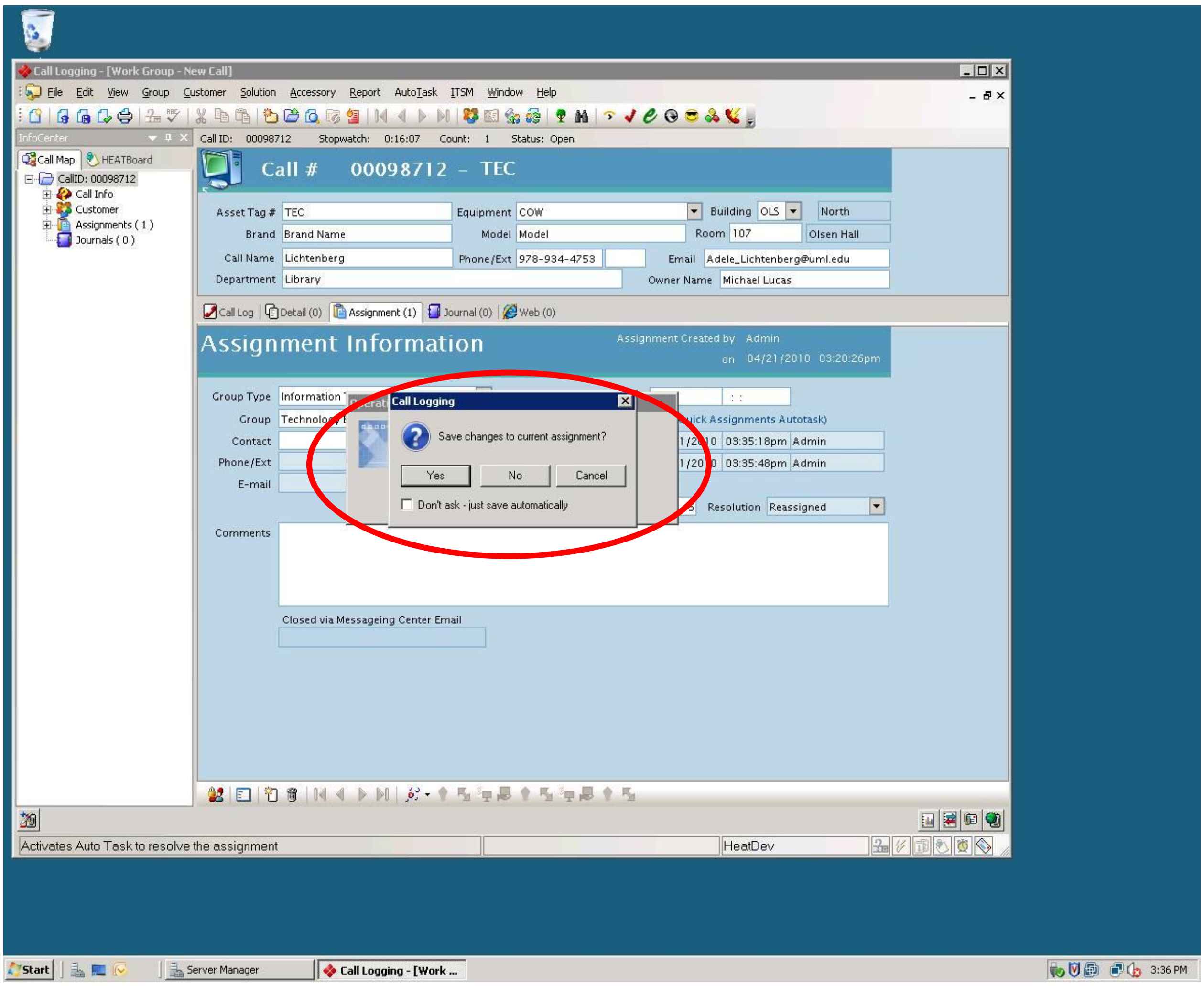
4. Enter the time spent on the assignment



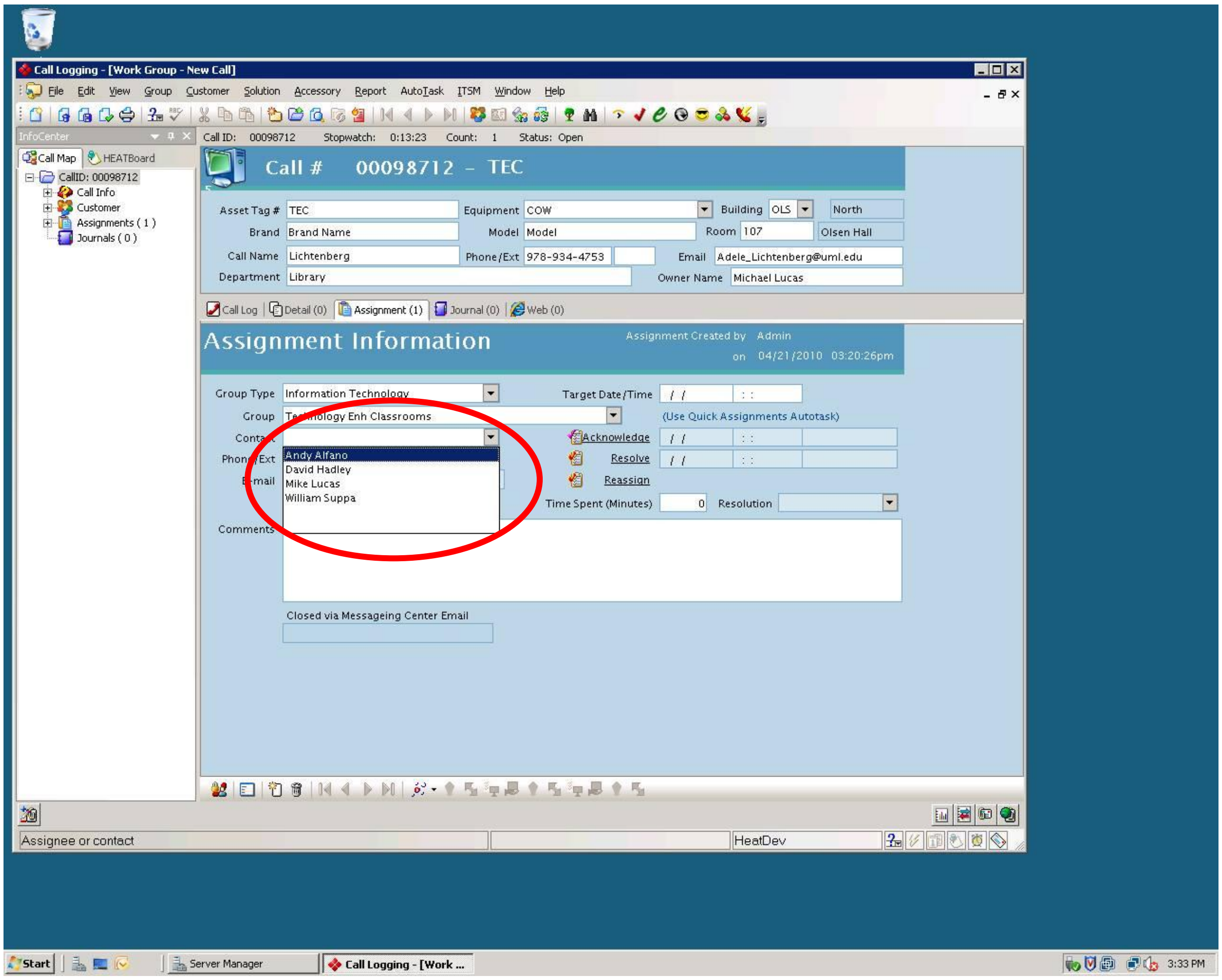
5. Select the Group (Technology Enh Classroom – to add an indivudial to the group)



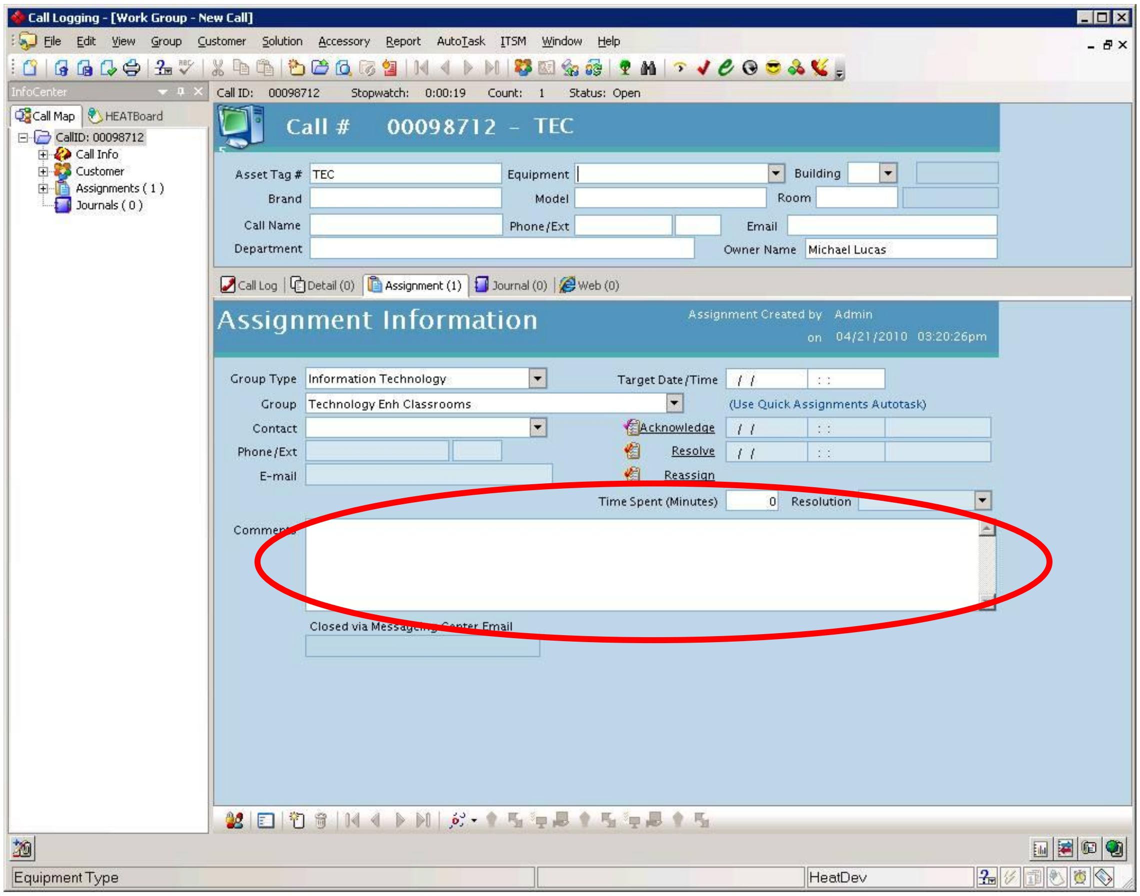
6. Click Yes to save changes made to the current assignment.



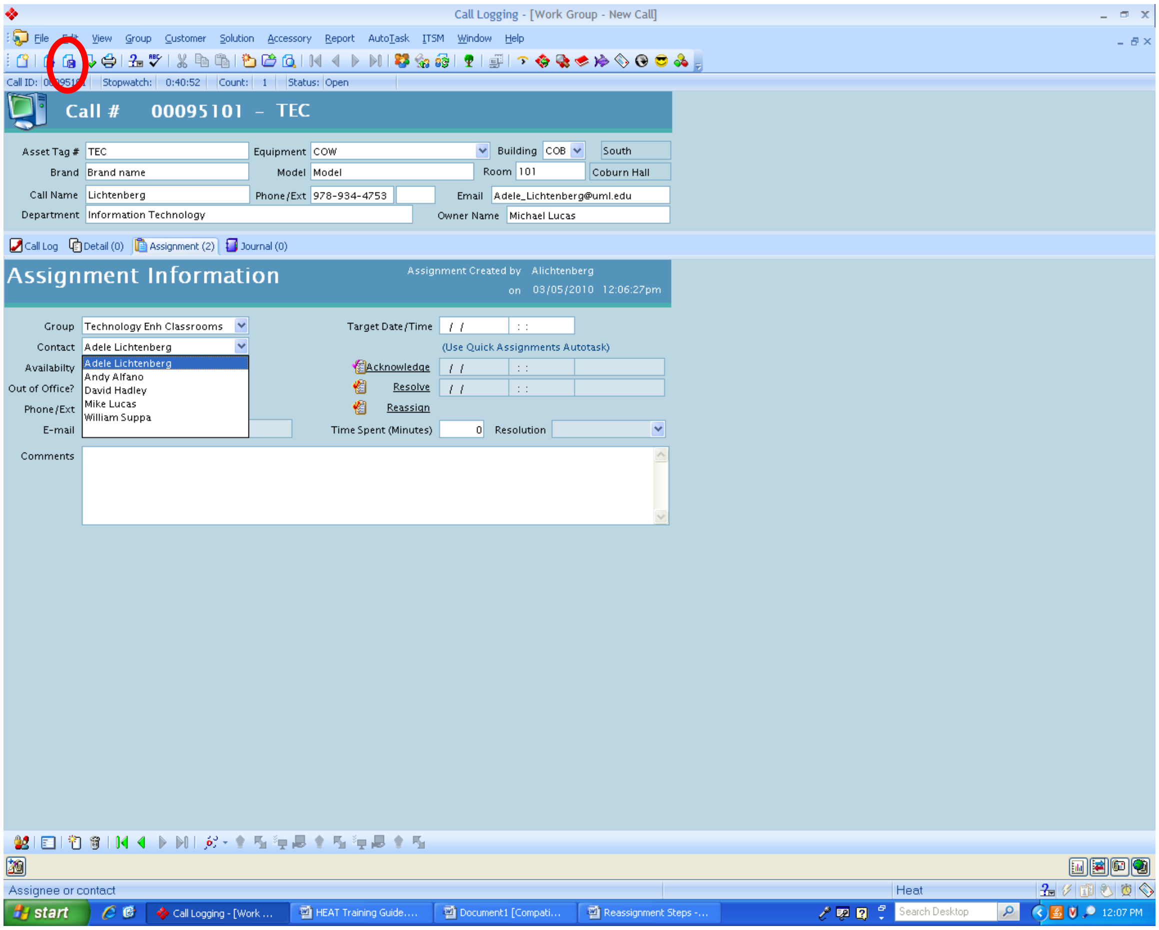
7. Select Contact to reassign the assignment to



8. Add a comment about the assignment (optional)

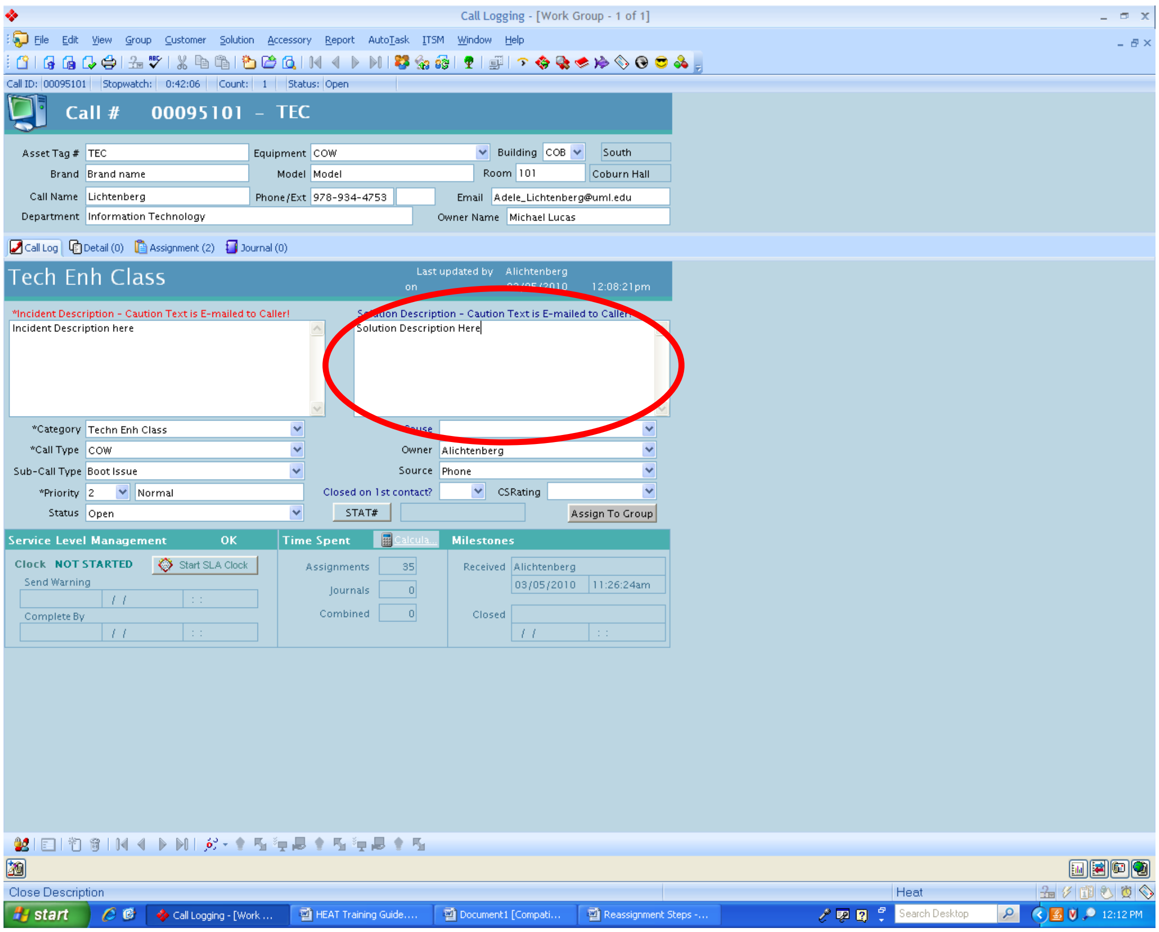


9. Save call record.

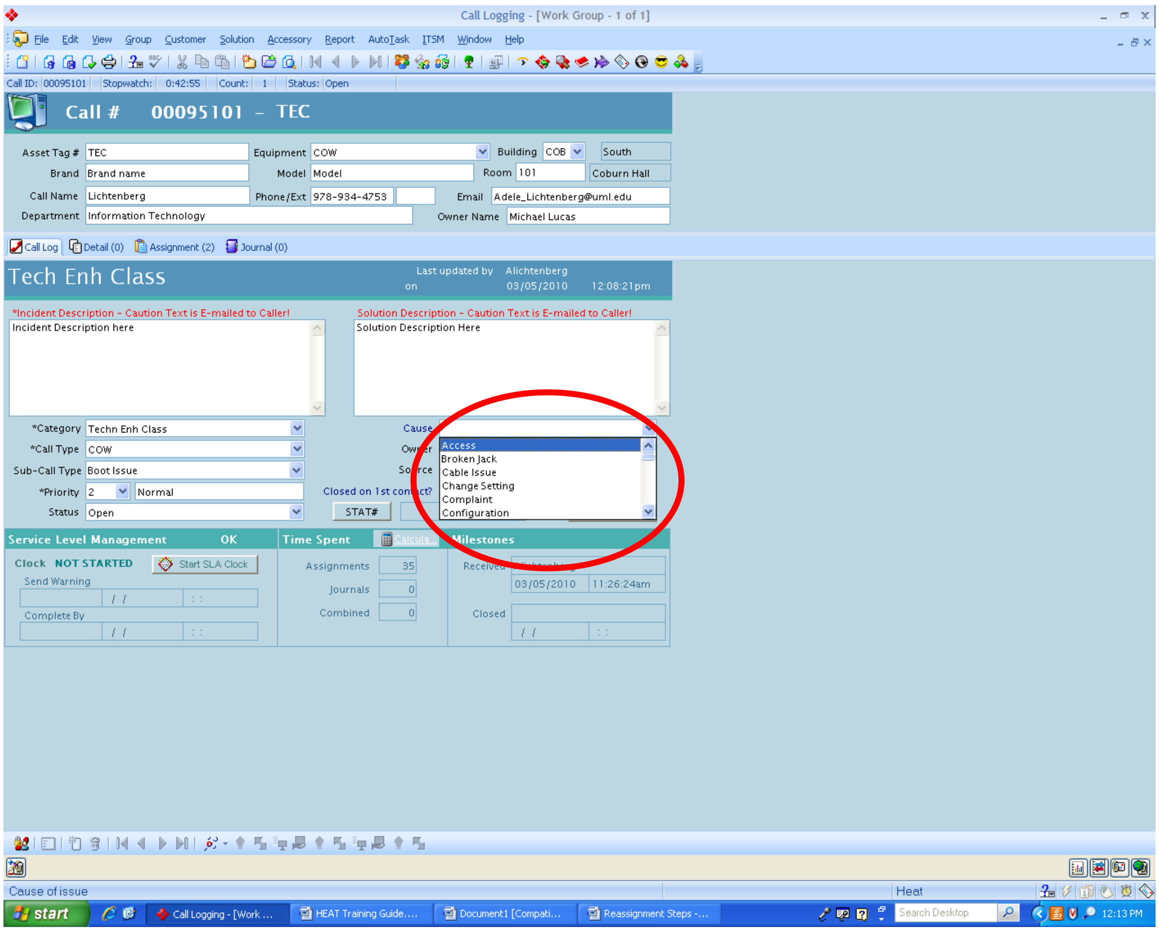


Close/Resolve TEC Ticket

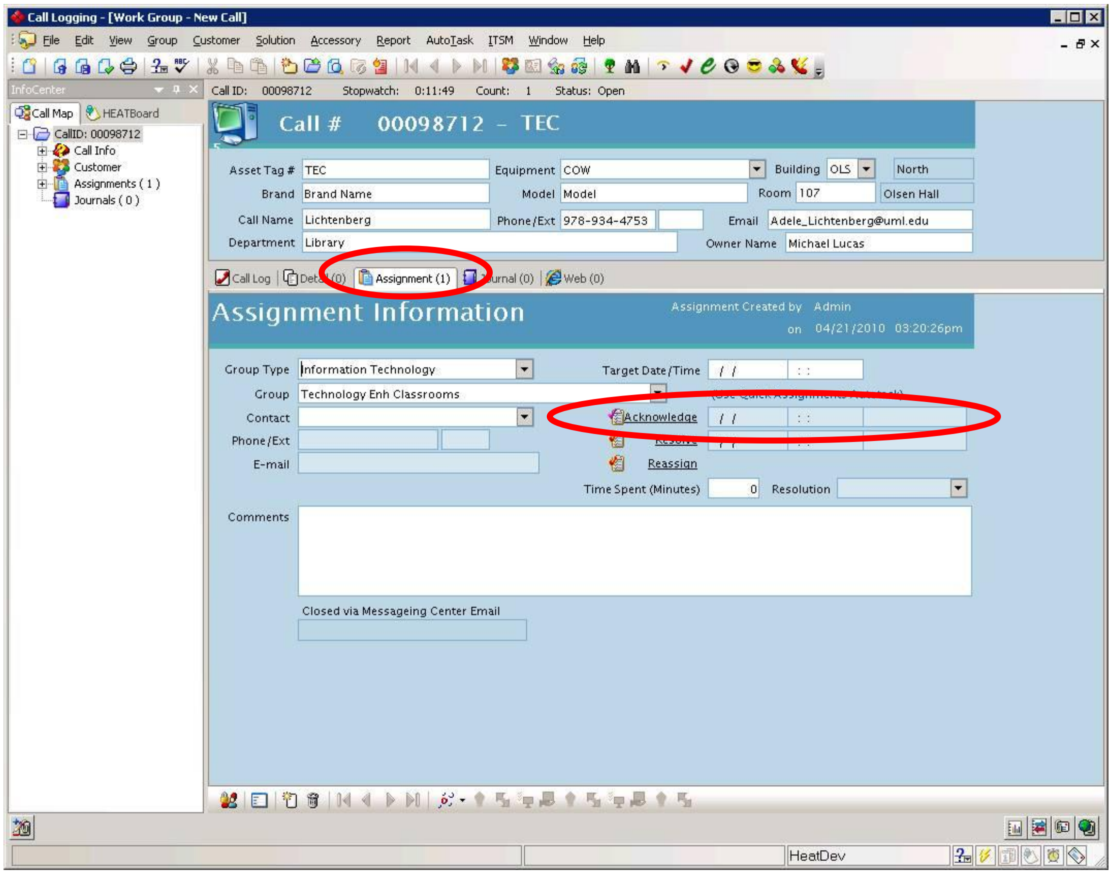
1. Log on to Heat, bring up the TEC ticket.
2. Once the ticket has been brought up, fill in the Solution Description.



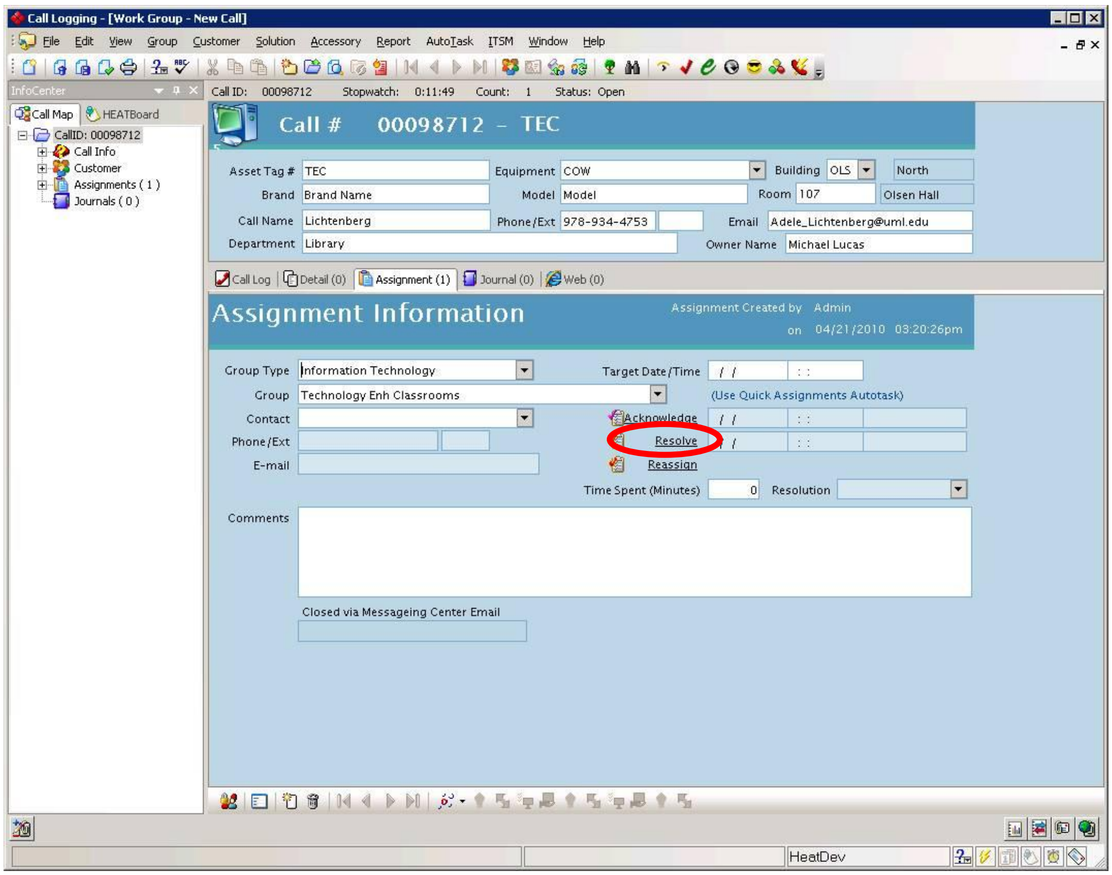
3. One the Solution Description is entered, choose the cause of the problem.



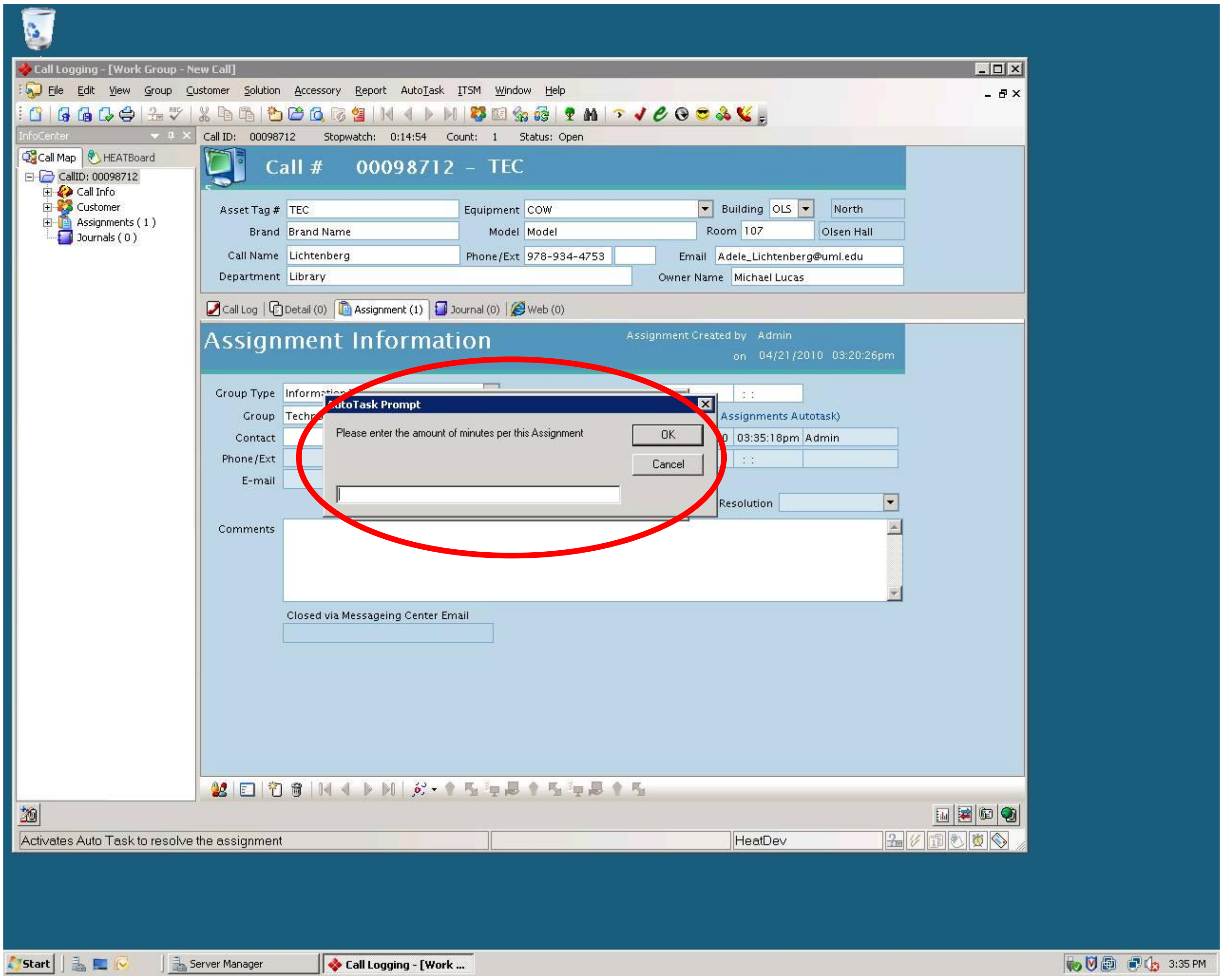
4. Click on the Assignment tab.
5. Click "Acknowledge" to Acknowledge the ticket



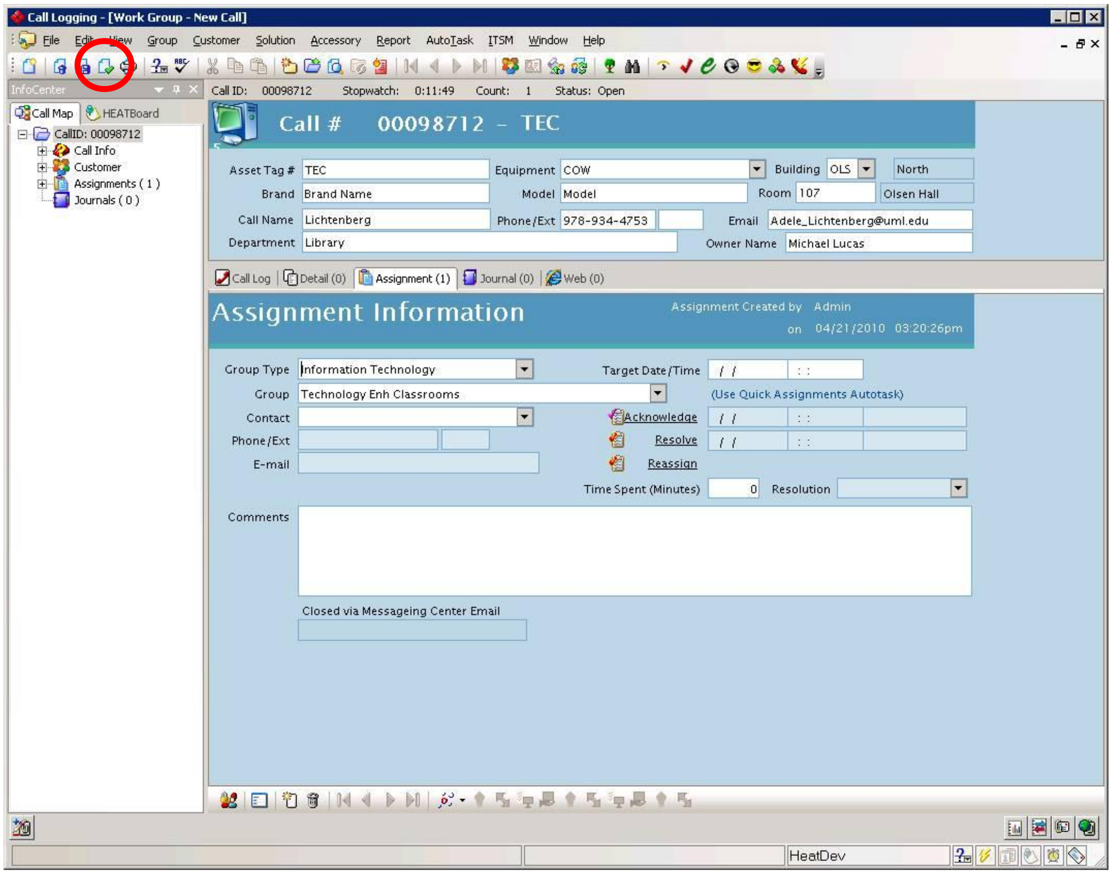
6. Click “Resolve” to resolve the ticket.



7. Enter the time spent working on the assignment



8. Close the Ticket using Quick Close



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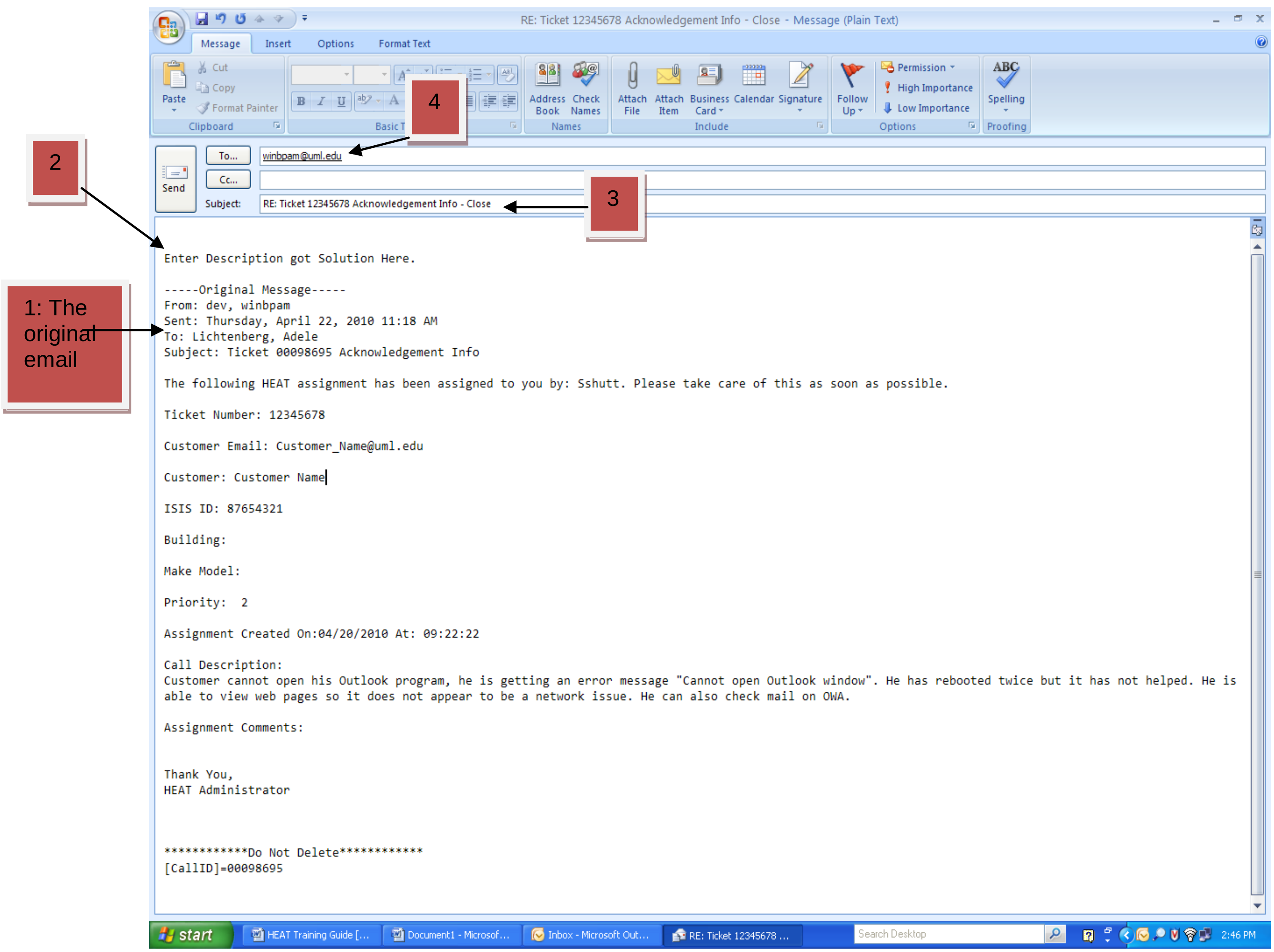
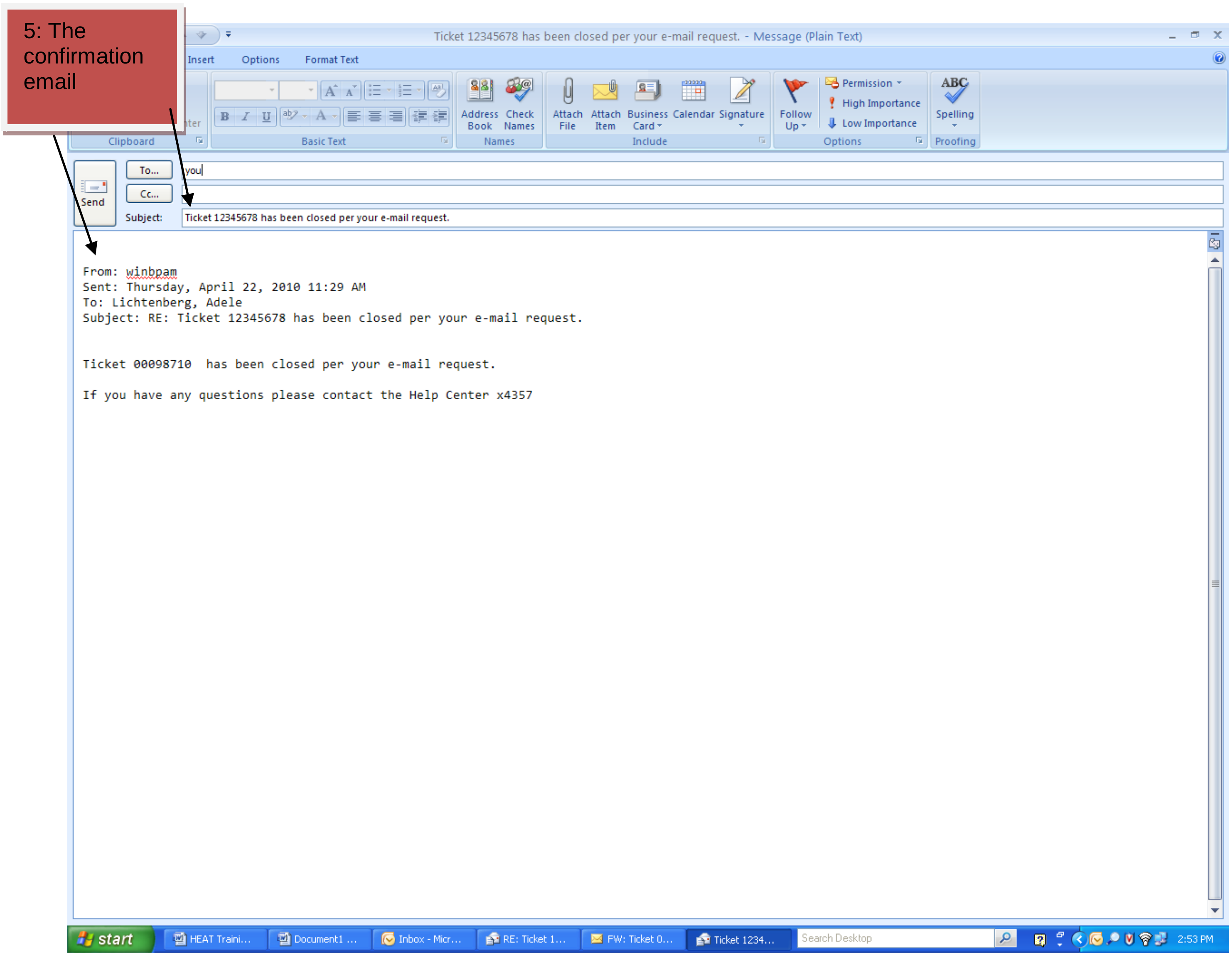
Auto-Closing a Heat Assignment

1. Reply to the Assignment Ticket email
2. Enter the Solution Description in the reply
3. Write "Close" in the Subject line after the original subject
4. Make sure the email is being replied to winbpam@uml.edu



5. Wait for an email sent from winbpam to confirm that your Email request to close the ticket assignment has been received.



Getting Help

Questions about...	Contact/Department	Phone/EMail
Using Lowell HEAT	Jose Guerrero IT - Training and Support	x4768 Jose_Guerrero @uml.edu
Access or Technical Questions	Help Desk	X4357