



The SyAM Help Desk can now be accessed from mobile devices such as tablets and phones without requiring an App to be installed. This quick reference guide will cover the setup and use guidelines.

Setup in Site Manager

It is recommended that the users who wish to use the mobile ticketing interface have their Home Page set as ticketing and a Default Filter for New and Open Tickets.

Administration – Users and Groups – Users

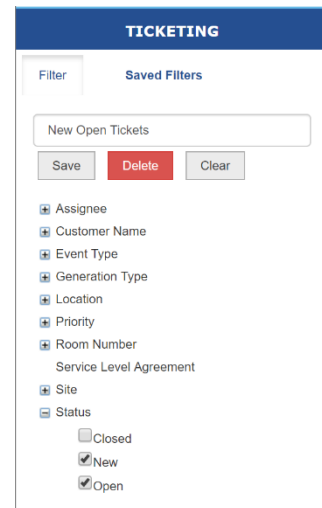
Select the user by checking off the checkbox next to their name, then select Ticketing as the Home Page

<input checked="" type="checkbox"/>	jrtech1	●	Jr Techs ▼	jrtech1@syamsoftware.com	Ticketing ▼	<input checked="" type="checkbox"/>	10 ▼
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Press Save to accept the changes

The following settings are user specific so the user will need to log into the Ticketing dashboard from their desktop browser.

Ticketing – Give the Filter a Name and Select the Status Open and New – Save





Within the Ticketing Dashboard click on the Gear icon top right to set the Default Filter

From the Default Filter drop down menu select the name of the filter you wish to use by default

The screenshot shows a settings window with a dark blue header bar containing a trash can icon, a gear icon, and a red square with a white 'X' icon. Below the header is a light gray area with the following settings:

Default Sort Field	Ticket ID ▼	Descending ▼
Default Filter	New Open ▼	
Tickets Per Page	25 ▼	
Default Ticket Tab	Comments ▼	
Collapse child tickets?	<input type="checkbox"/>	

Click on the X to close the window



Accessing the Mobile Ticketing Interface

On the mobile device open your browser and enter the URL for accessing your Helpdesk

Example <https://helpdesk.syamsoftware.com>

Enter your username and Password to Login

At this stage you can save this as a Book Mark or add to the Home Screen for quicker access

You will see the bookmark is set to the ticketing page

Example <https://helpdesk.syamsoftware.com/ticketing.aspx>



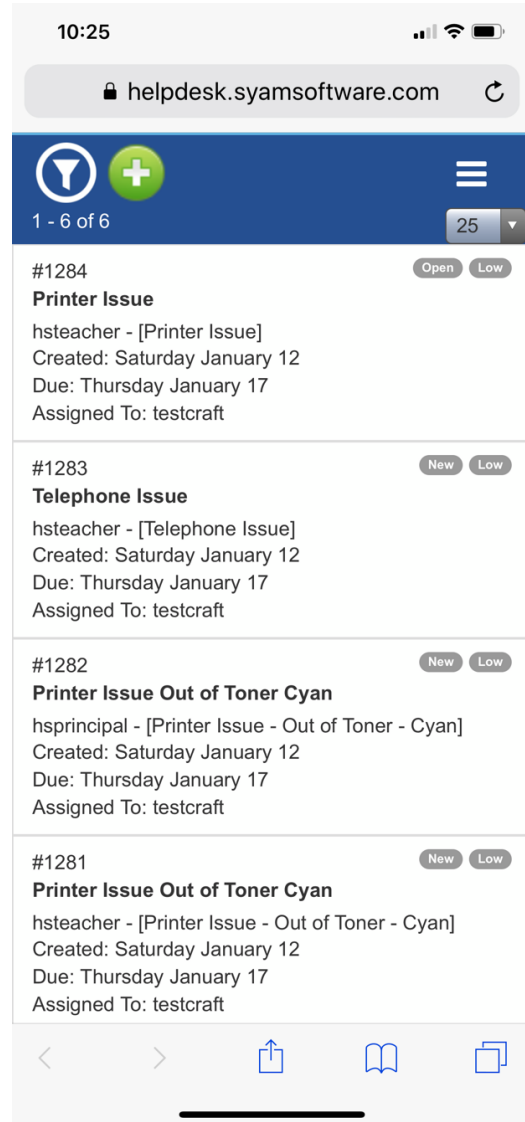
Mobile Ticketing Interface Quick Reference

Once logged in you will now be presented the Ticketing mobile interface

The top icons represent Filter and Add Ticket, the Menu icon will bring up the search window and Report and Export icons (If user has access to these features)

Next to the ticket number will be the status and priority level

Press on the ticket you wish to review or make changes to.





Updating a Ticket

From within the ticket you can view the problem summary along with the other applied comments.

The slides will hide or expose the Summary and Activity

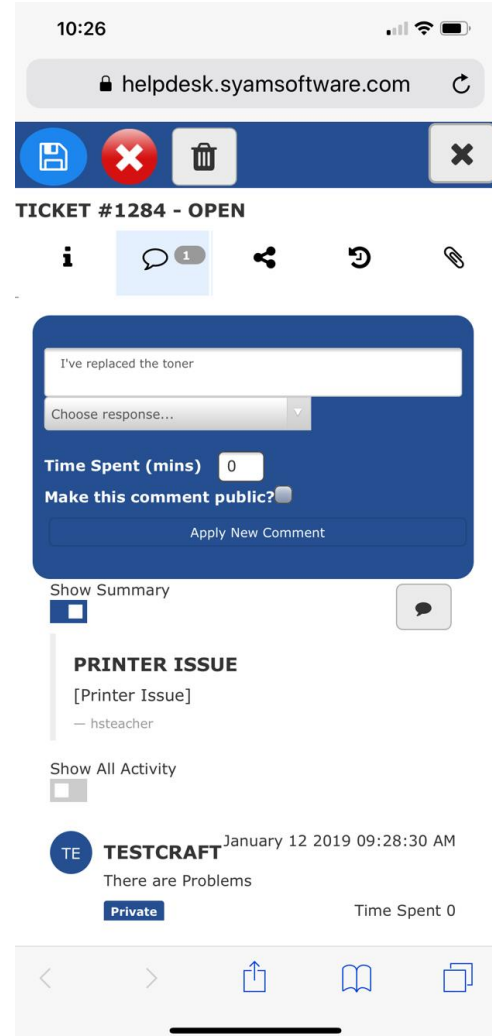
The top icons provide the ability to Save, Close, delete (If user has access to this feature) and Close without any changes.

Below the ticket number the row of icons provide the ability to view the ticket details, summary page, parent-child, history and attachments

Press the speech bubble icon to open the comments dialog box, enter your comments and press save icon at the top

Remember to select the Public check box to make the comments public

By pressing the Apply New Comment you will apply the comment and remain on this page, then you can add further comments or perform other actions.

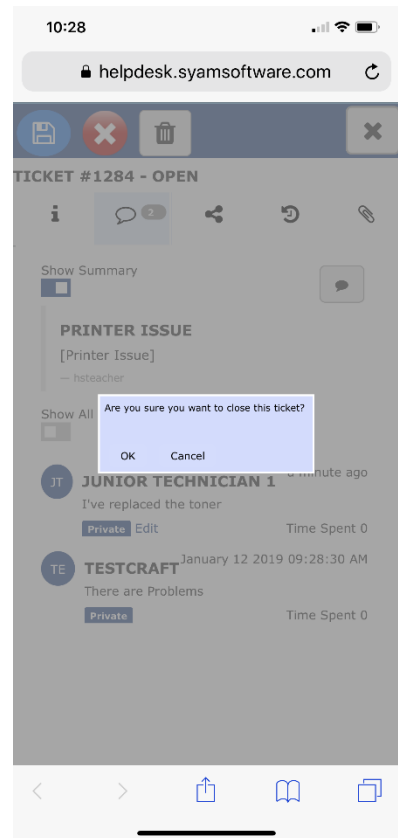




Closing a Ticket

After entering a comment, you can press the close button if you wish to save your comment and close the ticket

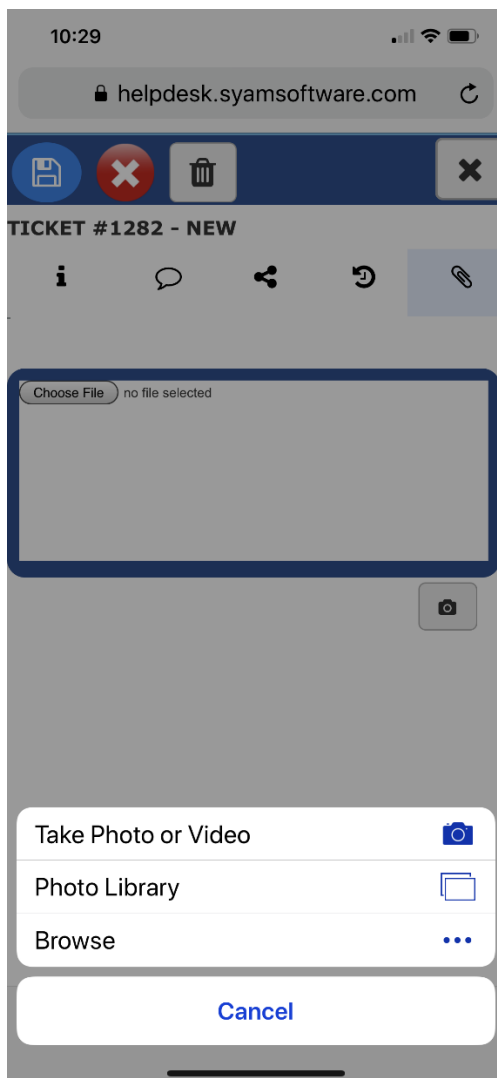
When closing you will get a second prompt confirming that you wish to close the ticket



Adding Attachments

To add an attachment to the ticket from the mobile device press on the Attachment icon then press the camera icon – then follow the device instruction on taking a picture or selecting a file stored on the device

Once select press the Upload File – then press the Save Ticket icon

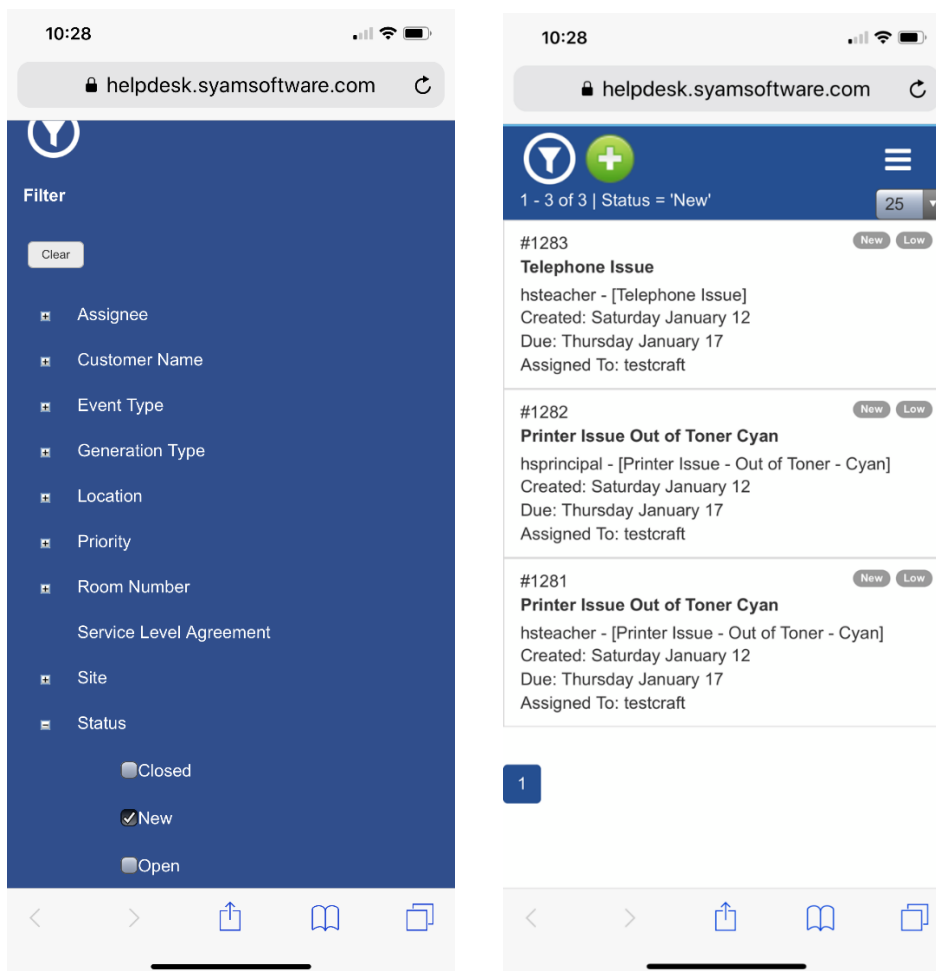


Filtering Ticket Dashboard

You can Filter the Ticketing dashboard by pressing on the Filter icon, this brings up the filter attribute menu, select the required attribute to filter by and it will automatically update the dashboard. You can open the filter to expand the filter further with more attributes.

The Filter values are presented under the icons

Example below is filtering by the Ticket Status New





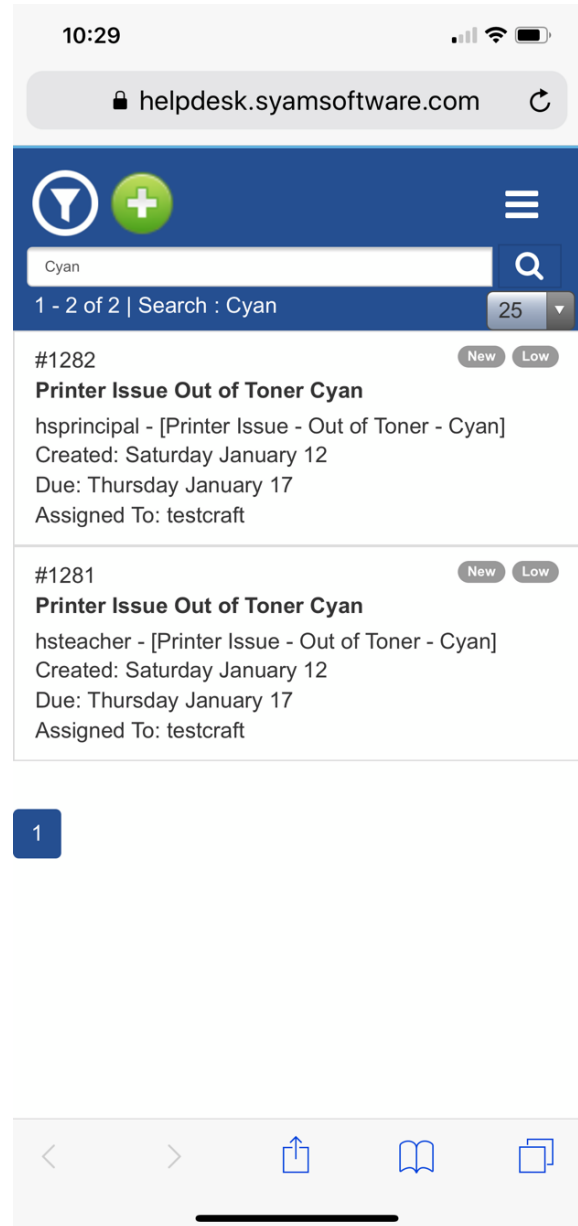
Searching Tickets

You can also search all tickets by pressing on the menu icon and entering the value you wish to search the ticket database for

You can search on

- Ticket Number
- Customer Name
- Problem Summary

The example shows searching on the word cyan that had been reported in the problem summary



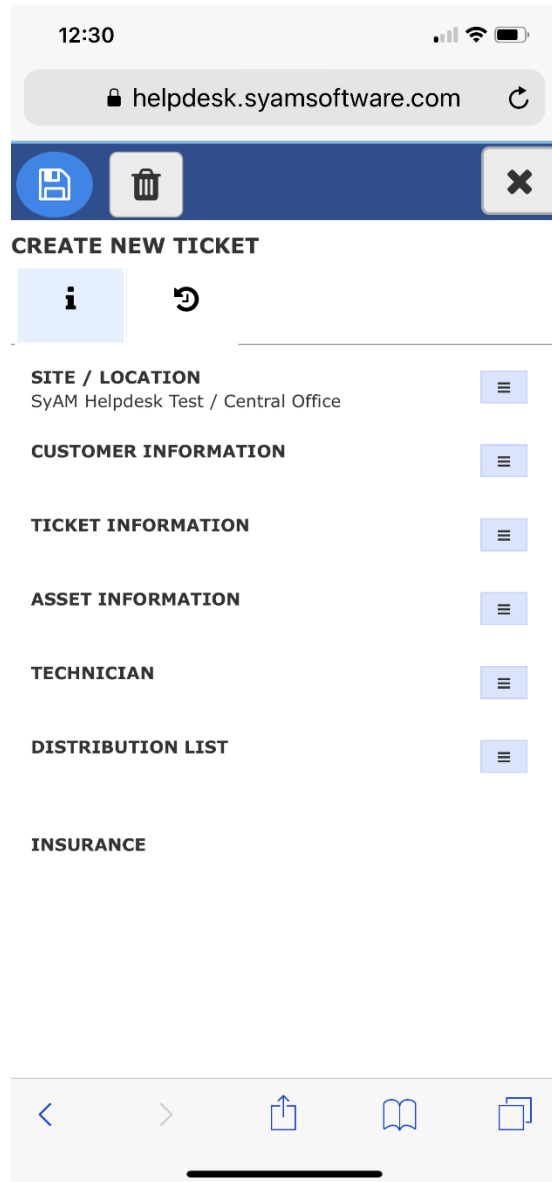
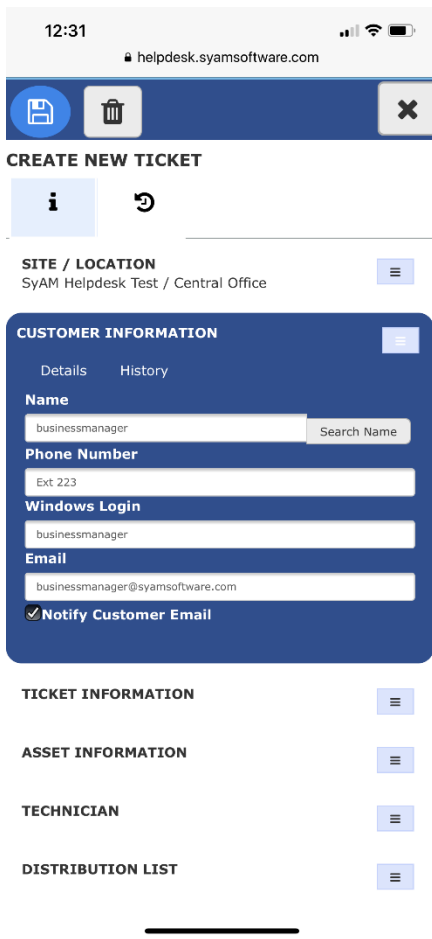


Creating Tickets

You can create a Ticket from the mobile interface by pressing on the green + icon

Press on the appropriate section to expand the segment to complete the Location / Customer / Ticket Information / Asset/ Technician

As with the desktop browser version you can search active directory for the customer and obtain their information





Mobile Ticketing Interface Quick Reference

Select the Event type and enter the ticket summary

When finished press the save icon at the top to save the ticket

The screenshot shows a mobile application interface for creating a ticket. At the top, the status bar displays the time 12:31, signal strength, Wi-Fi, and battery icons. Below the status bar, the URL 'helpdesk.syamsoftware.com' is shown. The main content area is titled 'SyAM Helpdesk Test / Central Office'. A menu icon is visible to the right of the title. Below the title, there are sections for 'CUSTOMER INFORMATION', 'TICKET INFORMATION', 'ASSET INFORMATION', 'TECHNICIAN', 'DISTRIBUTION LIST', and 'INSURANCE', each with a corresponding menu icon. The 'TICKET INFORMATION' section is expanded and contains the following fields: 'Event' (set to 'Required'), 'Telephone Issue' (selected from a dropdown), two empty dropdown menus, a 'Summary' text area containing '[Telephone Issue]', 'Estimated Completion Date' (with a date picker icon), 'Priority' (set to 'Low'), and 'Status'.