

XOOPS MODULE GUIDE.

Xhelp

Version: Beta .05

Project Members:

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Revision History

Revision	Date	Product/Scope	Author	Doc. Number
.01	09/24/2004	Xhelp .05	r.johnson	tbd

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Section 1.0: Module Summary And Requirements

XHELP SUMMARY

xhelp has been designed has a user-friendly helpdesk application for the XOOPS portal system.

The current xhelp release is: Beta 0.05

Known Issues

- Response Ratings not displayed in staff ticket details
- Default Templates are not XHTML compliant
- Admin Menu rollovers only display :hover in Gecko/Opera based browsers
- Removal of department causes tickets in the department to disappear

Installation Requirements

- XOOPS CORE VERSION: [2.0.6+](#)

Installation Instructions

- Unzip the xhelp compressed archive and upload it to the /xoops_installation/modules directory
- Install application using XOOPS module administration panel.
- Permission changes: If the default mail templates used by the xhelp module will be modified, the director: **modules/xhelp/language/english/mail_templates** will need to be made writable.

Section 2.0: xhelp Configuration

Introduction

An account with administrative privileges must be used to configure xhelp.

This section will explain how to set module preferences, add departments and set up user accounts that represent help desk staff members.

The xhelp Administration Menu

The xhelp module is administered just like most other modules. To access the xhelp administration menu, select Administration Menu, and hover your mouse over the xhelp module picture

The following areas can be administered:

- Blocks
- Departments
- Staff
- Email Templates
- Group Permissions
- Mimetype Management
- Preferences



There is also an xhelp tabular style menu on each administration page. This is visible when managing any of the xhelp areas, or by clicking the xhelp module picture.



Preference Configuration

After xhelp installation, the first area to configure is the Preferences. The Preferences contain the following module configuration options:

- Allowing Uploads
- Upload Size
- Upload Width
- Upload Height
- Allow Ticket Re-Open
- Announcements News Topic
- Staff Index Ticket Count
- Enable Notification
- Enable Specific Events

Change the preferences to suite the needs of the module. The default Preference settings are acceptable in most cases.

Department Configuration

The Departments are used to allow users to select the Department of the organization a ticket should be submitted to. Staff members assigned to that department will be notified when a ticket is submitted

Department Considerations

- A staff member can be assigned to one or all of the Departments created.
- Any department added will be visible to users submitting help requests
- Departments can also be used for categories or products. The name "Departments" can be changed to "Categories" or "Products" in order to suit the needs of the organization. Changing the name from "Departments" to "Categories" can be done by editing the language files.

Adding A Department

To add a department, select the xhelp module menu item: **Manage Departments**

The screenshot shows the xhelp Administrator Menu with the following structure:

- Top navigation: Preferences | Update Module | Go To Module
- Administrator Menu: Index | Manage Blocks | **Manage Departments** | Manage Staff | Modify Email Templates
- Sub-menu: Mimetype Management

The **Manage Departments** section contains:

- Add Department:** A text input field containing "Other" and a "Submit" button.
- Existing Departments:** A list of departments with "Edit" and "Delete" buttons for each:

Engineering	Edit	Delete
Sales	Edit	Delete
Service	Edit	Delete

In the **Add Department:** textbox, enter the name of a department, then click submit. The department will then be created. Create as many departments as needed.

Staff Configuration

The staffs are the members of the Xoops portal responsible for administering or answering tickets that have been submitted. Although staff members can submit tickets, it is important to note the difference between xoops users, and xhelp staff members.

Any user that belongs to a group with the necessary permissions can submit a help ticket, however only the "Staff" will be able to answer and close the ticket.

Staff Considerations

- A staff member can not answer or view tickets that have been submitted to departments he or she is not assigned to.
- A staff member can be assigned to one or more of the Departments created.
- It is possible to select user names and assign them to a department event though they do not have access to the xhelp module. (so be careful)

Adding Staff

To add an xhelp Staff member, select the xhelp module menu item: **Manage Staff**

In the “**Add Staff Members**” table, Click the **Select Username:** drop down box and choose the user name that should be assigned to a department. Then click the **Departments** the username will be assigned to. Once a username is assigned to a department, that user name becomes a staff member.

Editing Staff Members

To edit a staff members Assigned Departments, select the xhelp module menu item: **Manager Staff**

Existing Staff Members:	Edit	Delete
dscally	Edit	Delete
eglogan	Edit	Delete
jbuszinski	Edit	Delete
jmprice	Edit	Delete
jtbrown	Edit	Delete
rcjohnso	Edit	Delete
rtanzini	Edit	Delete
Teresa	Edit	Delete

In the “**Manage Staff**” table, click the “Edit” button next to the staff member that should be edited.

Edit Staff Member	
Username:	dscally
Departments:	<input type="checkbox"/> Service <input checked="" type="checkbox"/> Sales <input type="checkbox"/> Engineering <input type="checkbox"/> All
<input type="button" value="Update Staff"/> <input type="button" value="Cancel"/>	

Select the Departments the Selected Staff member should be assigned to, and then click the "Update Staff button". The user will be updated.

Group Configuration

The group configuration is used to set access rights and permissions to perform specific tasks in the xhelp module.

Group Configuration Considerations

- By default any user, regardless of group membership will be able to submit an xhelp ticket.
- It may be desirable to create additional Xoops Groups to be used specially with xhelp.

Modifying Group Permissions

To Modify Group permissions, select the xhelp module menu item: **Group Permissions**

Preferences Update Module Go To Module	xhelp Administrator Menu
<input type="button" value="Index"/> <input type="button" value="Manage Blocks"/> <input type="button" value="Manage Departments"/> <input type="button" value="Manage Staff"/> <input type="button" value="Modify Email Templates"/>	
<input type="button" value="Mimetype Management"/>	

Modify Group Permissions

Select service(s) that each group should be allowed to modify

Site Admins	<input type="checkbox"/> Assign Ownership <input type="checkbox"/> Delete Responses <input type="checkbox"/> Delete Tickets <input type="checkbox"/> Log Users' Tickets <input type="checkbox"/> All
	<input type="checkbox"/> Modify Responses <input type="checkbox"/> Modify Ticket Information
Registered Users	<input type="checkbox"/> Assign Ownership <input type="checkbox"/> Delete Responses <input type="checkbox"/> Delete Tickets <input type="checkbox"/> Log Users' Tickets <input type="checkbox"/> All
	<input type="checkbox"/> Modify Responses <input type="checkbox"/> Modify Ticket Information
Anonymous Users	<input type="checkbox"/> Assign Ownership <input type="checkbox"/> Delete Responses <input type="checkbox"/> Delete Tickets <input type="checkbox"/> Log Users' Tickets <input type="checkbox"/> All
	<input type="checkbox"/> Modify Responses <input type="checkbox"/> Modify Ticket Information
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

Select the access rights for each group and click the "Submit" button to update permissions.

Email Template Configuration

When a ticket is submitted, or updated in anyway, a notification can be sent to the submitter. The notification templates may be modified to suite the requirements of the organization.

Template Modification Considerations and Ideas

- Always back up the current template set prior to making changes.
- Adding the organization logo is a nice touch to any notification.
- HTML can be used.
- Including any steps the user should take for a particular status are also helpful additions.

Modifying Email Templates

To modify an Email Template, select the xhelp module menu item: **Manage Email Templates**

Modify Email Templates	
Template Name:	Description:
Dept: Changed Ticket Priority	Receive notification when the priority of a ticket is changed.
Dept: Changed Ticket Status	Receive notification when the status of a ticket is changed
Dept: Modified Response	Receive notification when a response is modified
Dept: Modified Ticket	Receive notification when a ticket is deleted
Dept: New Ticket Owner	Receive notification when ownership of a ticket is changed
Dept: New Response	Receive notification when a response is created
Dept: New Ticket	Receive notification when a new ticket is created
Dept: Delete Ticket	Receive notification when a ticket is deleted
Ticket: Changed Priority	Receive notification when the priority of this ticket is changed
Ticket: Changed Status	Receive notification when the status of this ticket is changed
Ticket: Modified Response	Receive notification when a response is modified for this ticket
Ticket: Modified	Receive notification when this ticket is modified
Ticket: New Owner	Receive notification when ownership has been changed for this ticket.
Ticket: New Response	Receive notification when a response is created for this ticket
Ticket: Deleted	Receive notification when this ticket is deleted

Click on the template that should be edited under the **Template Name** column. The **Description:** gives the action that will trigger the template used for the action-taking place on the ticket.

Mimetype Management

The Mimetype management is used to set allowable file extensions that can be uploaded when a ticket is submitted.

Adding/Modifying Mimetypes

To modify or add a Mimetype, select the xhelp module menu item: **Mimetype Management**.

Section 3.0: using xhelp

xhelp User Access

The xhelp system was designed with simplicity in mind. It is very easy to submit a ticket and manage the responses, notifications, and status'.

This section is broken down into two sub-sections. The first, "Using xhelp" describes how to use the xhelp system from a user standpoint, the second, "Managing xhelp Tickets", describes managing tickets submitted by users.

Using xhelp (user access)

The xhelp module allows users to submit, and view the status of any ticket they have submitted. When a user accesses the xhelp module, three areas are available:

Main

The **Main** area is the default screen that appears when a user accesses the xhelp module. This area displays any tickets that have not been closed by a staff member. The user can view activity such as answers and responses sent by the staff, and reopen tickets if the *Preference* configuration has been set to allow this action.



The screenshot shows the xhelp user interface. At the top, there are three navigation buttons: "Main" (selected), "Log Ticket", and "View All Tickets". Below these is a table titled "My Open Tickets" with the following columns: Subject, Status, Priority, and Log Time.

Subject:	Status:	Priority:	Log Time:
Please help!	OPEN	High (5 red bars)	2004/9/23 14:45:08
test	OPEN	Low (3 yellow bars)	2004/9/23 9:36:23

Log Ticket

The **Log Ticket** area is where a user can submit an xhelp ticket. Once a ticket has been submitted, it is considered an "open" status. The department the ticket was submitted to will be notified.

The screenshot shows the 'Log xhelp Ticket' form. At the top, there are navigation links for 'Main', 'Log Ticket', and 'View All Tickets'. The form itself has a title bar 'Log xhelp Ticket' and the following fields:

- Username:** A text input field containing 'defaultuse'.
- Assign To:** A dropdown menu currently set to 'Engineering'.
- Priority:** A set of radio buttons with corresponding colored indicators: Green (low), Yellow, Orange, and Red (high).
- Subject:** A text input field.
- Description:** A large text area for entering the ticket details.
- Add File:** A text input field for a file name and a 'Browse...' button.

At the bottom of the form, there are two buttons: 'Log Ticket' and 'Reset'.

Log Ticket Fields

- Username – account of the logged in xoops user.
- Assign To: - the department the ticket will be submitted to.
- Priority – how important the problem is the the user. "green is low" , "red is high"
- Subject – subject of the ticket
- Description: The reason the ticket is being submitted.
- Add File: Allows the user to attach a file along with the ticket submissions.

Log Ticket Buttons

Log Ticket – Submits the ticket to the department selected.

Reset – clears all fields.

View All Tickets

The **View All Tickets** area is where a user can view a list of tickets that have been submitted under their username.



The screenshot shows a navigation bar with 'Main', 'Log Ticket', and 'View All Tickets'. Below it is a section titled 'My Open Tickets' containing a table with the following data:

Subject:	Status:	Priority:	Log Time:
Please help!	OPEN	★★★★	2004/9/23 14:45:08
test	OPEN	★★	2004/9/23 9:36:23

Viewing A Ticket

To view additional information about a ticket that has been submitted, such as submission date, staff responses or status changes, click the subject line of the ticket.



The screenshot shows the 'Ticket Details' view for the ticket 'Please help! I've Fallen And Can't Get UP!'. The details include:

- Priority: ★★★★★★
- Status: OPEN
- Log Time: 2004/9/23 14:45

Below the details is a 'Responses' section with the text 'No responses found'. At the bottom is a 'More Info Required?' section with a text area and 'Add Info' and 'Reset' buttons.

Adding Additional Information

Any response submitted by xhelp staff members will appear. A staff member may require additional information, or the user may wish to add additional information about the request.

The screenshot shows the Xhelp interface with three main sections: Ticket Details, Resnnses, and More Info Required?.

Ticket Details: Includes navigation links for Main, Log Ticket, and View All Tickets. The ticket title is "Please help! I've Fallen And Can't Get UP!". The status is "OPEN" and the log time is "2004/9/23 14:45".

Resnnses: Shows a response from user "rcjohnso" on "2004/9/23 15:08". The response text reads: "Thank you for contacting our organization. We'll be happy to assist you the issue you have submitted, however we will require more information before we can suggest the best way to fix your problem. Please let us know exactly what you were doing prior to you not being able to get back up. If you can remember what position you were in prior to the fall, it will assist us in suggesting the best method to get back on your feet." There is a "Rate Response?" link.

More Info Required?: A section with a text box for adding information and "Add Info" and "Reset" buttons.

To Answer or add additional information, enter the text into the "More Info Required" text box and click the "Add Info" button. Each time a ticket is submitted, the department staff and the user will be notified.

Staff Access xhelp Overview

The xhelp module allows Staff and Department Members to view the status of any ticket submitted to a department where they have been assigned membership. This section assumes the Department Member has full administrative rights to the xhelp module.

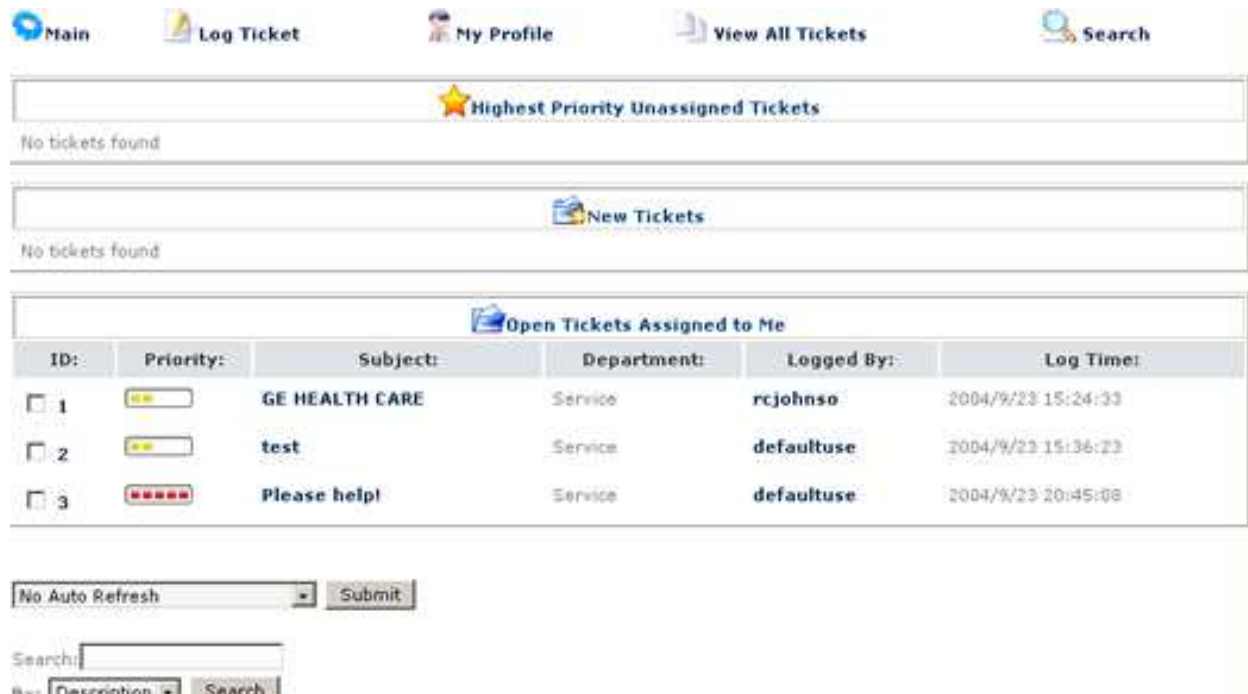
Staff Access xhelp Navigation

When a staff member enters the xhelp section. The following areas are available:

Main

The **Main** area is the default screen that appears when a staff member accesses the xhelp module. This area displays new tickets, tickets that have not yet been assigned to a staff member, and tickets assigned to the currently logged on staff member.

Configuration options also allow the staff member to set refresh preferences and perform word searches for tickets.



Priority Unassigned Tickets

This table displays help requests that have not yet been processed or assigned to a staff member. Only tickets with a high priority will be shown here.

New Tickets

This table shows tickets that have been submitted, but not yet been assigned to a staff member for processing. All tickets will appear here regardless of the priority.

Open Tickets Assigned To Me

This table shows tickets that the user has taken ownership of, or been assigned to.

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Log Ticket

The **Log Ticket** area is where a user or staff member submit an xhelp ticket. Once a ticket has been submitted, it is considered an "open" status. The department the ticket was submitted to will be notified. The Log Ticket area works the same way for "Users" and Staff members.

My Profile

The **My Profile** area is used to check the logged in staff members performance and rating reviews. This area is also where "Pre-Defined" responses can be created and inserted into a reply to a submitted ticket. At this time, only one response template can be used per response.

The screenshot displays the 'My Profile' section of a web application. At the top, there is a navigation bar with links for 'Main', 'Log Ticket', 'My Profile', 'View All Tickets', and 'Search'. Below this, the 'My Performance' section shows a table with the following data:

My Performance	
Average Response Time:	0 hours, 0 minutes, 0 seconds
Rating:	No rating
Number of Reviews:	0
Number of Tickets Closed:	0

Below the performance section is the 'Pre-Defined Responses' section. It contains a table with one row for a response template:

Pre-Defined Responses:	
Responses	Require More Info [Delete]
Template Name:	Require More Info
Message:	Thank you for contacting our organization. We'll be happy to assist you with your problem, however we will require more information before we can assist you.
Add signature to responses?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Actions:	[Update] [Reset]

Ticket Actions

When a ticket has been submitted, there are different actions that a staff member can do with the ticket:

To take action of a ticket, click the subject line of any table that it appears in and the Ticket Details will be provided.

The screenshot displays the Xhelp Ticket Details page. At the top, there are navigation links: Main, Log Ticket, My Profile, View All Tickets, and Search. The main content area is titled 'Ticket Details' and shows a ticket with the subject 'I fell down again' and a log time of 2004/9/23 22:03. The ticket description reads: 'Hi, thank you for helping me out the last time I fell. Well, it has happend again, and I don't remember how you told me to get back up.' The ticket metadata includes Priority (3 stars), Status (OPEN), Department (Service), and User ID (207.8.6.18). Below this is the 'Ownership Details' section, which shows the ticket is currently 'No Owner', with 0 minutes spent and in the 'Service' department. The 'Actions' section provides several options: 'Assign Ownership' (No Owner dropdown), 'Claim Ownership' (person icon), 'Add Response' (reply icon), 'Edit Ticket' (pencil icon), 'Delete Ticket' (trash icon), and 'Print Ticket' (print icon). There are also controls to 'Update Priority' (using a star rating) and 'Update Status' (with radio buttons for OPEN, HOLD, and CLOSED).

Possible Actions

Ownership To take ownership of a submitted ticket, click the "Claim Ownership" icon. Assigning a ticket to another staff member can also be performed.

Once a ticket has been assigned, or claimed, it is no longer considered "New".

Ticket The staff member can Respond, Edit, Delete or Print the ticket

Update Priority The ticket priority can be adjusted

Update Status The status can be updated. A ticket can be closed from this menu.

menu.

Ticket Details

The ticket details displays any responses that have been made, a history of actions that have taken place since the ticket was opened, and other tickets that have been opened by the user. Additional notification options can also be set.

This can be a very valuable area to find additional information and problem history

Search

The search function allows staff members to search other submitted tickets. It is possible to search in the Description or Subject Field, and limit the number or results returned per page.



The screenshot shows a navigation bar with five items: 'Main' (with a globe icon), 'Log Ticket' (with a document icon), 'My Profile' (with a person icon), 'View All Tickets' (with a document icon), and 'Search' (with a magnifying glass icon). Below the navigation bar is a search form titled 'Search'. The form contains three rows of input fields: 'Search:' with a text input box, 'By:' with a dropdown menu set to 'Description', and 'Number of Results Per Page:' with a dropdown menu set to '5'. At the bottom of the form are two buttons: 'Search' and 'Reset'.

Managing xhelp Tickets

When a user, or another staff member submits a ticket, it will be sent to a Department, where the department lead or members can assign, take ownership, respond, edit, delete, and/or print the ticket.

Assigning And Taking Ticket Ownership

Although once a ticket is submitted, any action can take place, it is best to first claim the ticket, or assign it to another staff member.



Assign Ownership:

To assign ownership to a staff member, click the subject of the ticket, to load the Ticket Details view, and select the Staff members name from the drop down box.

Claim Ownership

To claim ownership, click the subject of the ticket, to load the Ticket Details view, and select the Claim Ownership icon.

Responding To an xhelp Ticket

To respond to a submitted ticket, or a ticket that has been assigned, click the subject of the ticket, and select "Add Response" from the Action Table.

A Pre-Defined Response can be entered along with additional information. A ticket status can also be updated along with the response. Once the response has been entered, click the "Add Response" button.

Creating Pre-Defined Responses

To create a Pre-Defined response, select "Create Response" from the "Responses" drop down list. Enter the message that should be inserted into a reply into the "Message" text box and set the Signature option. Click the "Update" button to save the response.

Pre-Defined Responses:	
Responses	-- Create Response --
Template Name:	<input type="text"/>
Message:	<input type="text"/>
Add signature to responses?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Actions:	<input type="button" value="Update"/> <input type="button" value="Reset"/>

Additional Information

Xhelp is still a beta product. Updates and further information can be found on the xoops dev site: <http://dev.xoops.org/modules/xfmod/project/?xhelp>