XOOPS MODULE GUIDE.

Xhelp

Version: Beta .05

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Revision History

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

Table of Contents

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 Menus

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**

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 morel 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**

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

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**

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**

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.

| Main | Log Ticket | | View All Tickets |

		My Open Tickets		
Subject:	Status:	Priority:		Log Time:
Please help!	OPEN	ooooo		2004/9/23 14:45:08
test	OPEN	oo		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.

Log Ticket Fields

- Username – account of the logged in xoops user.

- Assign To: - the department the ticket will be submitted to.

- Priortiy – 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.

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.

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.

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.
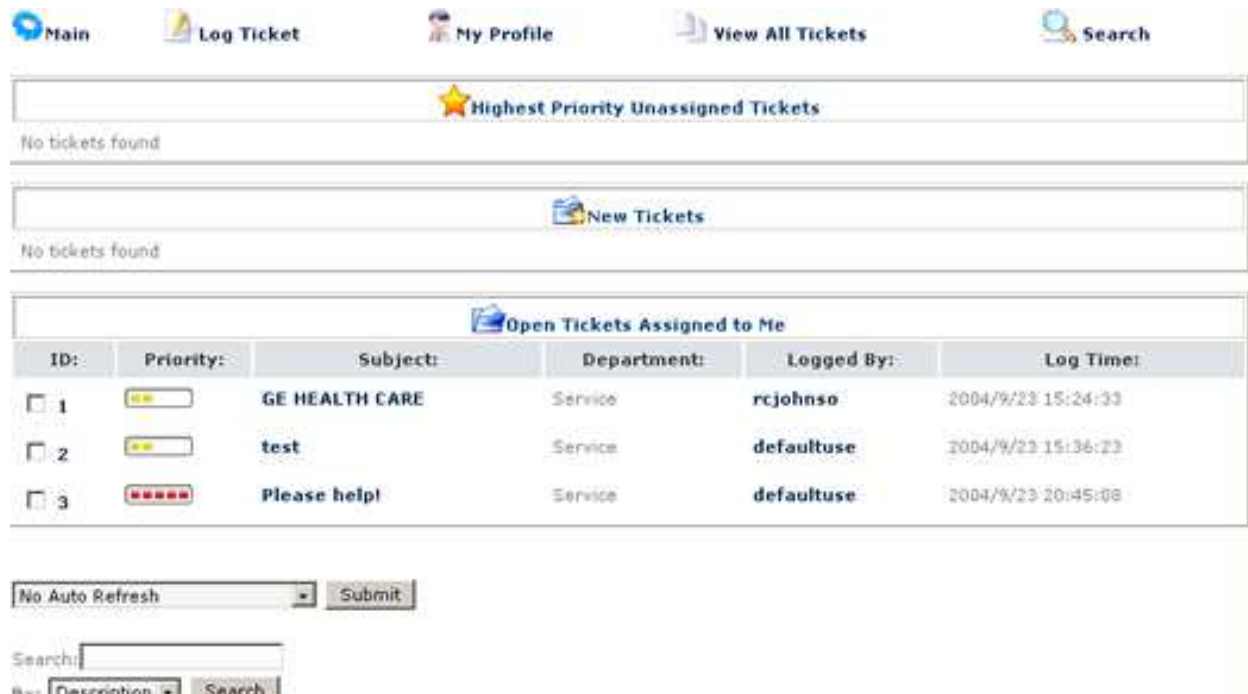
Priority Unassigned Tickets	*This table displays help requests that have have not yet been processed or assigned to a staff member. Only tickets with a high priority will be shown here.*		**Staff Access Ticket Tables**
New Tickets	*This table shows tickets that have been submitted, but not yet been assigned 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.*		

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.

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.

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.

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.

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