Using Magic Total Service Desk

Written for Illinois State University
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Overview

Magic Total Service Desk is the campus Help Desk software solution used by Illinois State University. This guide will lead you through the basic use of Magic. You will learn how to create new Help Desk tickets, update and check on the status of existing tickets, close and reopen tickets, link tickets to a White Board activity, and change your Magic password.

Logging into Magic

To login to Magic, do the following:

1) Using Internet Explorer 5.5x on a Windows computer, go to http://www.support.ilstu.edu (or http://support.ilstu.edu).

2) When you are prompted to login, use:
   User name: Your ULID
   Password: Your ULID

   At this time, you may not change your password yourself. If you forget your password for Magic or if you would like to change it, contact Justin Smith, the Magic Administrator, at 438-7375 or jjsmit1@ilstu.edu.

   Please also note that your password for Magic is not tied in any way to any other password you maintain. If you change your email password or your domain password, it will not affect your password for Magic.

3) If you are a member of more than one Group in Magic, you will be prompted to select the Group you wish to login to. Double-click on the selected Group. Most users of Magic are members of only one Group and are automatically logged in once they have entered their user names and passwords.

Magic Navigation Bar

Once you are logged into Magic, take note of the navigation bar on the left side of the window. Typically, the navigation bar contains the following items (although this can be customized).

Problem Management

- **Help Desk:** Create new Help Desk tickets, edit, reassign, or close existing tickets. This is where problem information is stored.

- **Help Desk Monitor:** Search for tickets associated with a certain Client. This module allows you to avoid creating duplicate tickets by searching for a Client's ticket(s) prior to generating a new one. *Help Desk Monitor* can also be used to open or close tickets for a particular Client.

- **Tech Monitor:** Search for tickets assigned to you or to a Group. *Tech Monitor* is useful for getting a look at your "To Do" list. This module can also make it easy to find tickets you have assigned to TNSS.

- **White Board Monitor:** Associate a new or existing ticket with an active White Board. White Boards are notifications about system outages and alerts. When a White Board is active, its message will scroll across the top of your browser window.

- **Knowledge Search:** Search for solutions to common problems. The Magic Knowledge Search contains three types of articles: Knowledge-Paks (canned solutions), the Problem Description/Resolution of all Help Desk tickets, and External Documents (Word documents, etc.) that have been manually added to the database.

Support

- **Unlock Help Desk Tickets:** When a Magic user views a Help Desk ticket, that ticket is locked and can only be viewed by other users in read-only mode. When the first person is finished viewing the ticket, the system automatically unlocks that record so that it can be edited again. Occasionally, a ticket is not unlocked automatically by the system—usually only if a ticket is left open in a browser window for an extended period of time (such as overnight). *Unlock Help Desk Tickets* can be used to force the system to unlock a particular ticket.

- **Logoff:** Click to logoff of Magic.

- **Help:** Launches Magic's Help file, which contains basic information about the various modules and instructions on performing common tasks.

Create New Help Desk Ticket: Help Desk Monitor

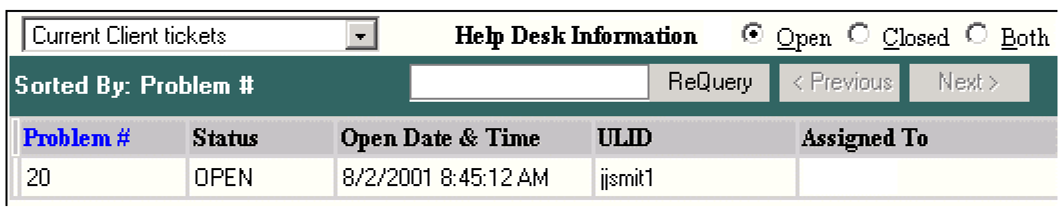
To create a new Help Desk ticket in Magic, do the following:

1) Click on *Help Desk Monitor* on the navigation bar.

2) In the *ULID* box, type the ULID of the person having the problem. Then press TAB or click the little gray button at the end of the field. Note: Pressing the Enter

key will do nothing.

3) Any Help Desk tickets currently open for this person will appear in the white space below. If the person does not have any Help Desk tickets open, the message, *No Records Found*, will appear. If you would like to see any closed tickets for this person, click the *Closed* radio button on the right side of the window.



If one of the open tickets for this person applies to the current problem, you should open that ticket and add any applicable information, rather than creating a duplicate ticket for the same problem. However, if no tickets for this person apply to the current problem, you should create a new ticket.

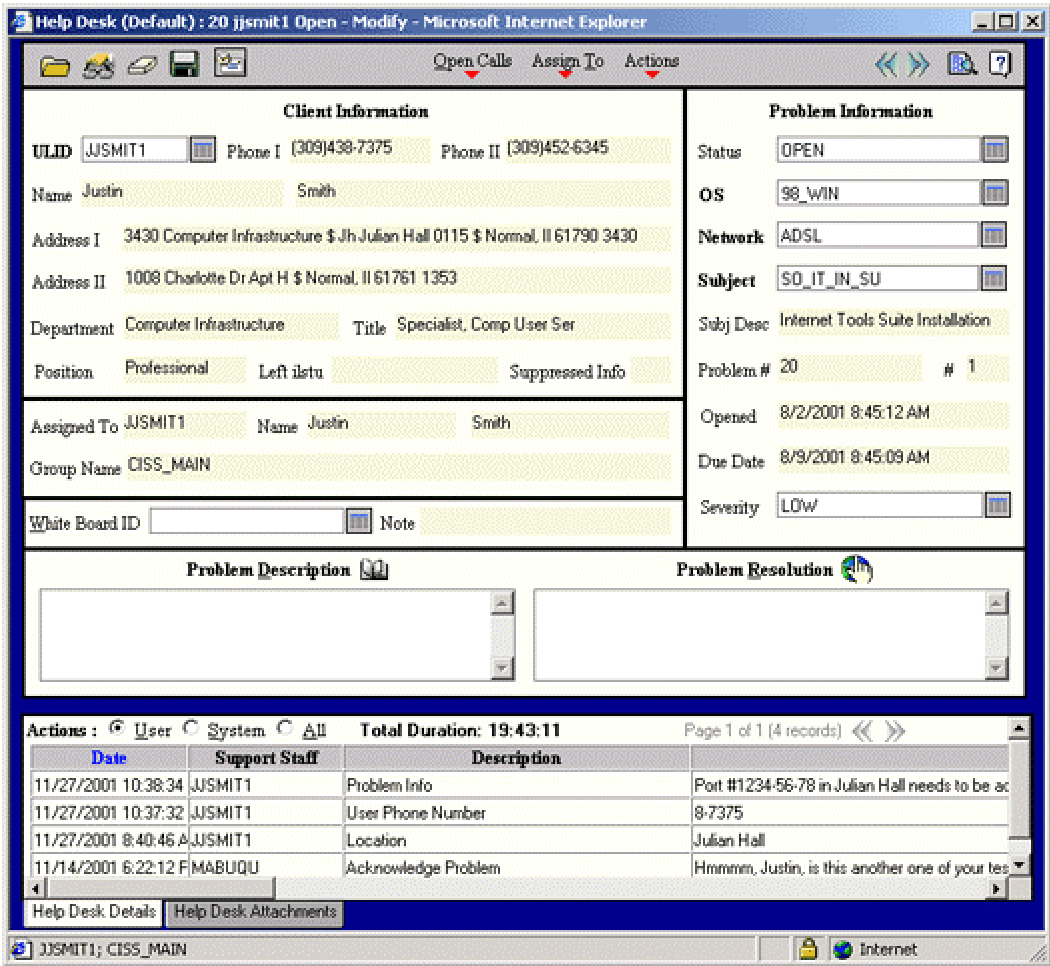
4) To **edit an existing ticket** for this person, double-click the ticket. It will open in the Help Desk form so that you can add new information. To **create a new ticket** for this person, click *Actions* > *Create Help Desk Call* at the top of the window.

Help Desk Ticket: Complete Required Fields

The steps above show you how to create a new Help Desk ticket using *Help Desk Monitor*. By following those steps, you can avoid creating duplicate tickets. However, if you are sure that a ticket has not yet been created for a particular problem, you can click on *Help Desk* on the navigation bar. This will open a new, blank Help Desk form.

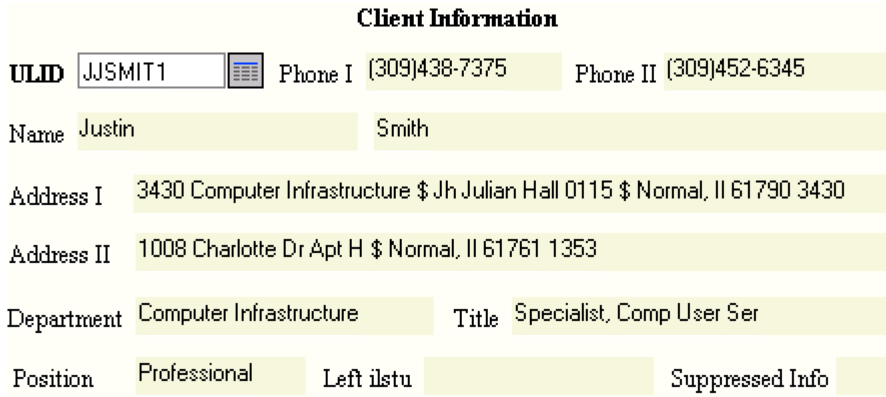
1) Once the Help Desk form is open, you can create a new ticket or edit an existing ticket's information.
    a. If you opened the Help Desk form by clicking the *Help Desk* link on the navigation bar, the form will be empty.
    b. If you chose to create a new ticket from within *Help Desk Monitor* the Client Information section will contain information.

c. If you have opened an existing Help Desk ticket, the ticket will be completely filled out (although fields specific to your Magic Group may not be completed).



2) Your first task is to make sure all required fields are completed. A required field is indicated in **bold** (with the exception of the Problem Description and Problem Resolution fields, which are never required).

3) If the ULID field is empty, type the person's ULID in the appropriate box. Then press TAB or click the little gray button; pressing Enter will do nothing. All fields in Magic work this way.



4) The OS field is next. Click the little gray button to select from a list.

   If you know the code for the operating system you would like to select, you may type it in the box instead of clicking the gray button. For example, if the problem computer described in this Help Desk ticket has the Windows 2000 operating system, you could type 2000_WIN in the box.

   To save even a bit more time, you can type a partial code instead of the full code. For example, instead of typing 2000_WIN, you could type just 2000 or even 2. Magic does a query based on what you have typed. If only one match applies, it will automatically complete the field for you when you press TAB. However, if more than one match applies, it will present you with a pop-up window, so you can choose the appropriate item.

   Since there are no other operating systems that have a code starting with “2000” (or even “2”), Magic will complete this, resulting in 2000_WIN. However, if you had just typed X or 9 in the box, a pop-up would appear since Magic contains X_MAC and XP_WIN, as well as 95_WIN and 98_WIN as choices.

5) Complete the Network field in the same manner.

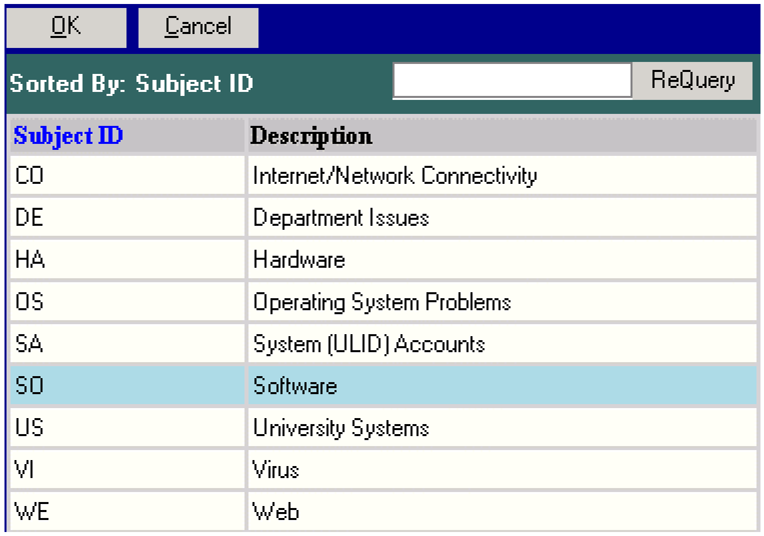
6) Click the gray button to select a Subject. Unlike ULID, OS, and Network, you will probably want to click the gray button to select an appropriate Subject. As you become more familiar with Magic’s subject tree, you may find yourself typing Subject codes more frequently.

   The list of available Subjects is somewhat different from the list of operating systems or network types. When selecting a Subject for the ticket, you can use the subject tree to “drill down”, moving from a general Subject to a more specific Subject.

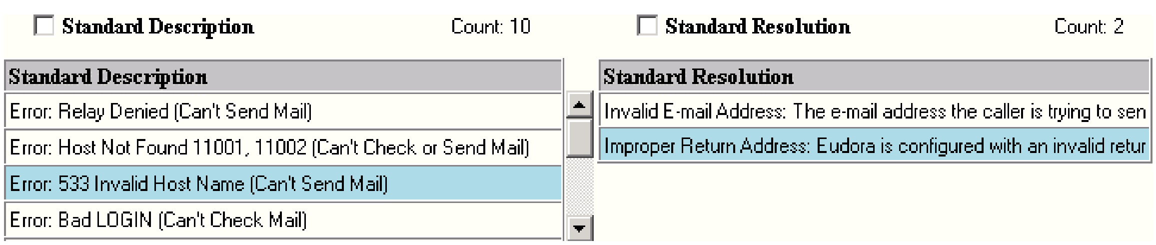
   For example, if the problem is related to checking email in Eudora Pro, you might do the following:

   a. Click on the little gray button next to Subject.

b. After looking over the top-level categories, double-click on Software.



c. Then, double-click on Email Clients.
d. Finally, select Eudora Pro.
e. Notice that there are some Standard Descriptions and Standard Resolutions at the bottom of the window. If you wish, you may select a Standard Description and/or a Standard Resolution from the list. To include these in the Help Desk ticket you are creating, place a check in the checkbox(es). Note that, at this time, not all Subjects have Standard Descriptions and Resolutions associated with them.



f. Click OK.

Help Desk Ticket: Problem Description and Problem Resolution

The Help Desk form contains two special boxes: Problem Description and Problem Resolution. Intuitively, it seems like this is where you might type information about the person's problem, as well as steps you might have taken to fix it. However, there are a few important things to know about the Problem Description/Resolution boxes.

- **Knowledge Search:** The contents of the Problem Description/Resolution boxes will eventually become part of Magic's Knowledge Base. Because of this, it is important that you **never put personal or sensitive information in the Problem Description or Problem Resolution boxes**.

- **No Time/Date Stamp:** A disadvantage of the Problem Description/Resolution boxes is that there is no associated audit trail. In other words, if information is added to these boxes, Magic has no way of recording who added that information or at what time/date.

- **Not Required:** The Problem Description/Resolution fields are not required. It is recommended that you only type something in these fields if you believe it would benefit someone doing a Knowledge Search. You may leave these fields blank.

Help Desk Ticket: Save and Add Help Desk Details

You have now completed all required elements of the Help Desk ticket. Click the Save button (which looks like a floppy disk icon and is located at the top of the window). 

Once you have saved the ticket, Magic will assign it a ticket number, or a Problem #. You may want to inform the Client as to what the ticket number is so that he or she can refer to that ticket number at a later time (such as if that person were to call you back to check on the status of the problem).

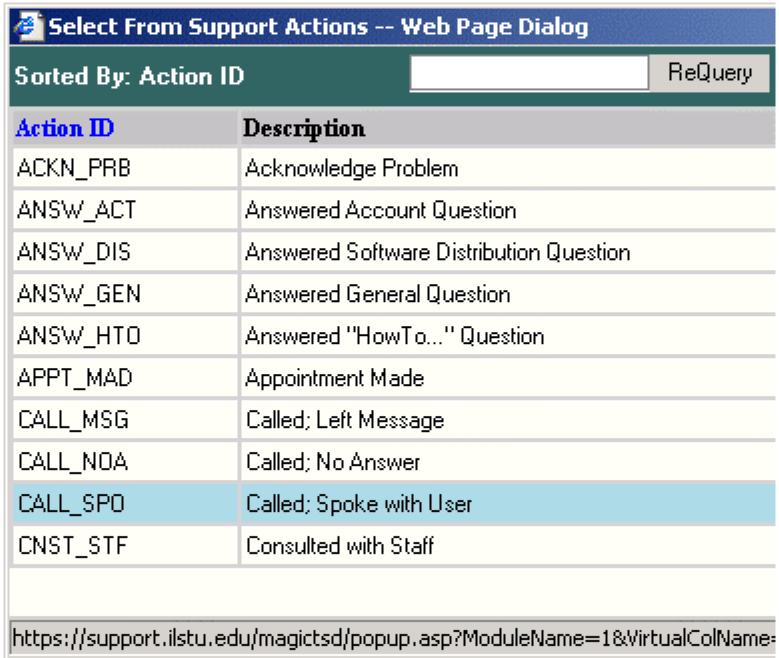
1) Now that the ticket is saved, you can add Help Desk Details.

   Help Desk Details (or Help Desk Actions, as they are sometimes called) allow you to add notes to a ticket without fear of that information ever becoming part of the Knowledge Search. Plus, all Help Desk Details are audited, which means you will know later on who added a particular note and at what date/time the note was added.

2) To add Help Desk Details (i.e. a note) to the ticket, right-click down at the bottom of the window in the empty white space.

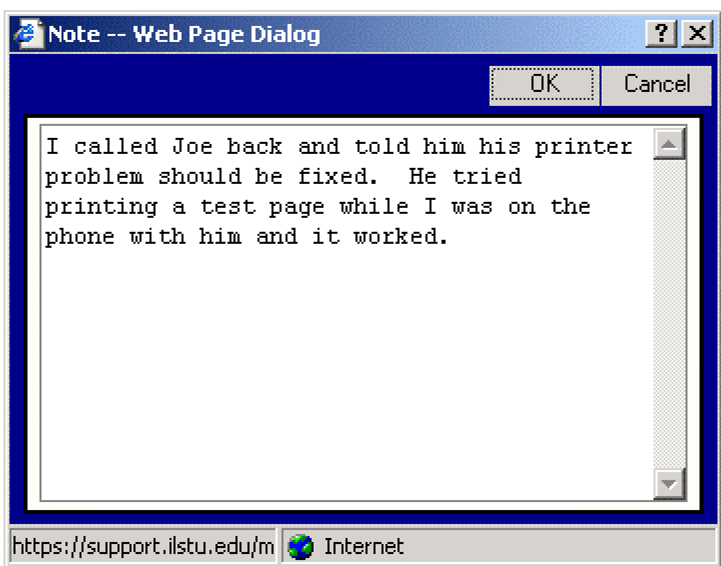
3) A little pop-up will appear; select *Add New Help Desk Details*.
   

4) A window will appear, allowing you to select from a large list of available Details, or Actions. Think of these Actions as categorized notes. The specific Action you select conveys information, just as the contents of your note will convey information.



For example, if you called someone back about his or her problem, you might want to add the Action, *Called, Spoke with User*. To do so, you would select that Action from the list and then click OK.

5) After you have selected an Action and clicked OK, a Notes window will appear. Type a note containing useful information, and then click OK.



For example, if you are adding the Action, *Called, Spoke with User*, then you might want to write a brief note about your conversation with the user. You could write, "I called Joe back and told him his printer problem should be fixed. He tried printing a test page while I was on the phone with him and it worked."

There are many Help Desk Actions to choose from. You should browse through the list of Actions to familiarize yourself with the items available. Most Actions automatically pop up the Notes box so that you can add a note to the ticket. However, a few Actions, like *Called, No Answer*, do not have an associated Notes box, since the Action itself says all there is to say.

Help Desk Ticket: Assigning or Closing Ticket

Once you have added all necessary information to the ticket, you will usually do one of three things:

- **Work on Problem:** If you have created the ticket for your own record-keeping purposes, then you will probably do nothing to the ticket. By default, a ticket you create is assigned to you.

- **Reassign the Ticket:** You may want to reassign the ticket if some other unit on campus should handle the problem. For example, if you want to report a network problem, you would assign the ticket to TNSS.

- **Close the Ticket:** Once the problem has been resolved, you should close the ticket.

To **assign the ticket** to another Group or Staff Member, do the following:

1) Open the ticket and click *Assign To > Group* [or] *Assign To > Staff Member*.

2) A pop-up window will appear. Use the Next and Previous buttons to locate the Group or Staff Member you wish to assign the ticket to. Select the Group or Staff Member from the list. If you are assigning the ticket to a staff member, click on the staff member's record. Then, select his or her Group from the lower portion of the window.

   NOTE: It is strongly recommended that you **always** assign tickets to the MAIN Group when assigning tickets outside your own area. For example, if you need to send a ticket to TNSS, assign the ticket to TNSS_MAIN, as opposed to assigning the ticket to a staff member within TNSS_MAIN. Of course, you should feel free to assign tickets to staff members within your own Group, as your own unit deems appropriate.

3) If your Group has rights to see tickets assigned to the Group you have chosen, you will still be able to view and edit the ticket.

   For example, all Groups on campus have rights to see TNSS_MAIN tickets. If you assign a ticket to TNSS_MAIN, you will still be able to see and edit that ticket.

If your Group does not have rights to see tickets assigned to the selected Group, then the ticket will immediately disappear from view. This can be somewhat concerting the first time or two it happens.

For example, only certain CISS Groups have rights to see CISS_HELPDESK1 tickets. If you assign a ticket to CISS_HELPDESK1, the ticket may disappear from view once you complete the Assign To process. There is no way to view or edit this ticket unless you contact a Help Desk employee and have the ticket reassigned back to your Group.

To **close a Help Desk ticket** once the problem has been resolved, do the following:

1) Open the Help Desk ticket and click *Actions* > *Close* or *Actions* > *Quick Close*.

2) If you select *Actions* > *Close*, a pop-up window will appear, allowing you to make final changes to the ticket before it is closed. You may modify the Subject, add a Problem Resolution, etc.

   If you select *Actions* > *Quick Close*, the ticket will immediately close without further prompting. For Magic users who know that the ticket is ready to be closed immediately, using *Quick Close* is preferable.

To **reopen a closed Help Desk ticket** so that it can be updated, do the following:

1) Open the Help Desk ticket and click *Actions* > *Reopen Call*

2) You can now edit the Help Desk ticket.

Finding an Existing Ticket

You may need to find existing Help Desk tickets on a regular basis. Someone might call you to check on the status of a ticket. Or, you may need to update a ticket after working on someone's problem. New tickets might be assigned to you or to your Group and you may be interested to know what those problems are.

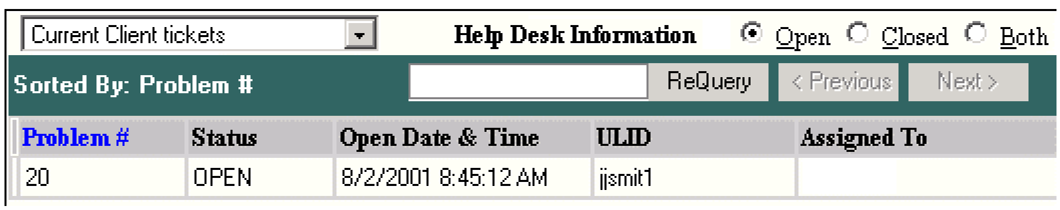
Help Desk Monitor: Tickets Associated with a Client

As mentioned previously, Help Desk Monitor allows you to view tickets associated with a particular Client—the person having the problem. To use Help Desk Monitor to view a list of open or closed tickets that have been generated for a particular Client, do the following:

1) Click *Help Desk Monitor* on the Magic navigation bar.

2) Type the Client's ULID in the ULID box and then press TAB or click the little gray button.

3) A list of open tickets for that Client will appear in the area below. If no open tickets currently exist for the Client, the message, *No Records Found*, will appear instead.



4) To view a list of closed tickets for the Client, click the Closed radio button on the right side of the window (or click the Both radio button to see both Open and Closed tickets).

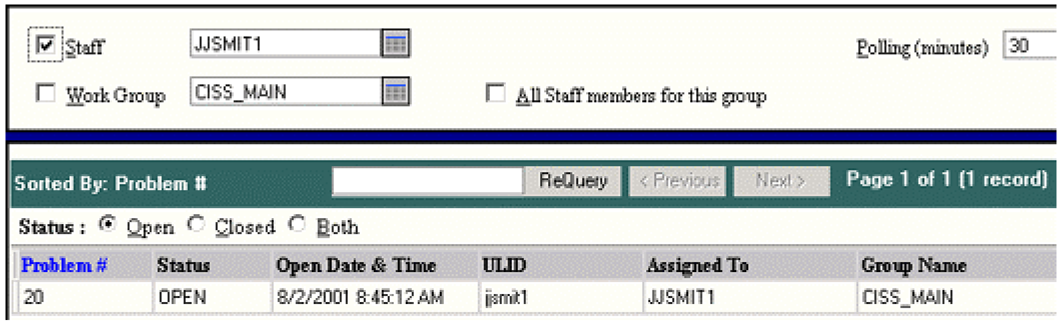
5) You can double-click a Help Desk ticket in the list to open it in the Help Desk form.

Tech Monitor: Tickets Assigned to You or Your Group

Tech Monitor allows you to view tickets assigned to you or to your Group. To use Tech Monitor to view a list of tickets, do the following:

1) Click *Tech Monitor* on the Magic navigation bar.

2) The Tech Monitor window will appear. Your ULID will appear in the Staff box and the Staff checkbox will be checked. Therefore, by default, Tech Monitor will show you all tickets assigned directly to you.



Think of Tech Monitor as a kind of filter. If none of the checkboxes are checked, then no filters are being applied. If you check one or more of the checkboxes, then filters will be applied, narrowing the number of records retrieved.

3) If you uncheck the *Staff* checkbox, you will see a list of all tickets your Group has rights to see. For most Groups, this means that you will see a combination of tickets assigned to your Group, as well as tickets assigned to TNSS_MAIN.

4) Check the *All Staff members for this Group* checkbox to see a list of tickets assigned to your Group. This will give you a list of tickets assigned to individuals within your Group, as well as those tickets assigned to the Group as a whole.

5) Check the *Workgroup* checkbox to see a list of tickets assigned to Group (but not to any individual within your Group). If both the *Staff* and *Workgroup* boxes checked, you will get a combination of tickets assigned to you personally, as well as those assigned to your Group.

6) Like with Help Desk Monitor, you can select the Closed or Both radio buttons on the left side of the window to alter the list of tickets.

White Board Monitor: System Outages and Alerts

Magic's White Board is used to notify users of Magic to campus outages and alerts. If a White Board is active, you will see scrolling text across the top of your browser after logging into Magic.

If one of your users were having a problem related to the White Board event, such as would be the case if the mail server was down and people were unable to check or send email, you may link your Help Desk ticket to the White Board. When the system outage is resolved and the service is restored, the White Board will be closed. At that time, all tickets linked to the White Board activity will be closed automatically.

To link a ticket to an active White Board event, do the following:

1) Click on the scrolling text at the top of your browser window, or click on *White Board Monitor* on the Magic navigation bar.

2) Click *Actions > Create Help Desk From White Board*

3) A new Help Desk form will open, allowing you to create a new Help Desk ticket that will be linked to the current White Board event. You do not need to do anything in addition to completing the Help Desk ticket like normal. Leave the ticket open; once the White Board issue is resolved, the ticket will be closed automatically, along with the White Board event itself.