

User Manual

Help Desk Portal



Version: 1.0



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1 Summary

The scope of the document is to provide guidance for the Help Desk Portal users. It describes the step-by-step instructions regarding the registration and authentication process, and demonstrates how to create, monitor, and resolve or cancel a Help Desk case.

2 Registration

The registration process begins with an invitation email sent by our Service Management Team.

1. The registration invitation email will look like the example displayed below:

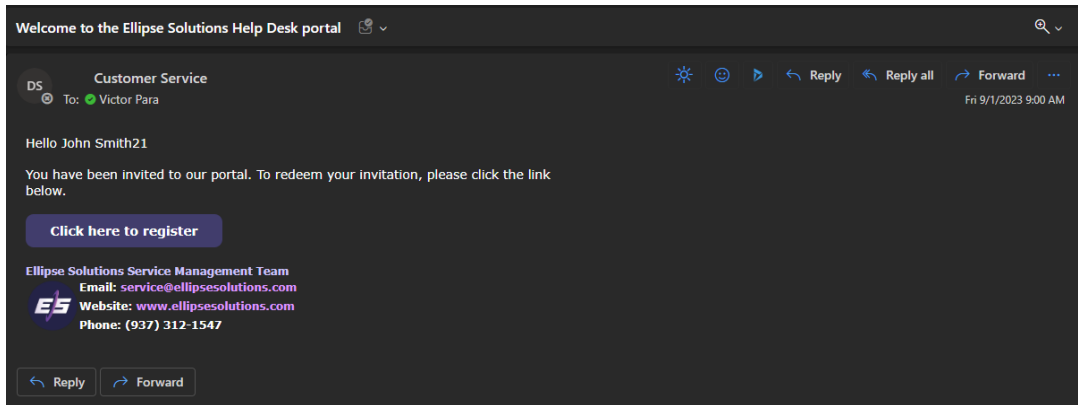


Figure 1 Invitation email

2. Please use the “Click here to register” button.
3. A web page will be opened in the web browser with the main URL as <https://helpdesk.ellipsesolutions.com>. A unique invitation code will be pre-populated.

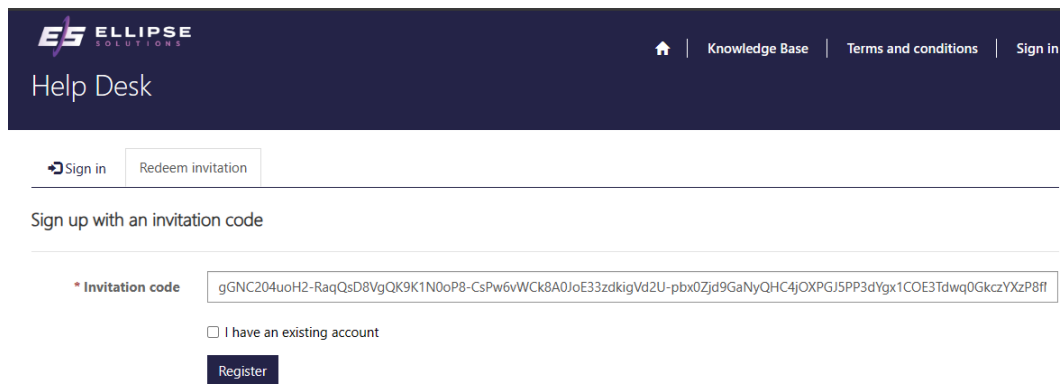


Figure 2 Redeem invitation page.

4. Click the “Register” button to redeem the code.
5. In the Registration form, please provide your preferred Username and Password. The password should be at least 8 characters long and it should be a combination of letters and numbers.

Figure 3 Registration

6. Once the registration is completed, you will be re-directed to the “Home” page automatically.

Figure 4 Home page

3 Opening a Help Desk Case

Opening a new Help Desk Case or reviewing the list of the existing cases for your company, can be done by accessing the “My support” page.

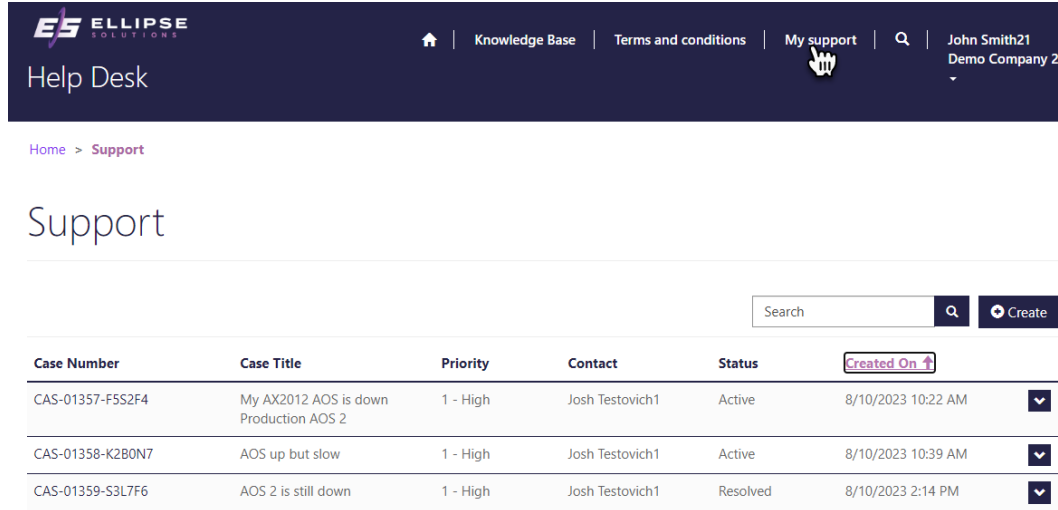


Figure 5 My support

On this page, a list of all of the existing cases will be displayed. Users can search and sort the data in the respective list.

To create a new case, click the button “Create”:

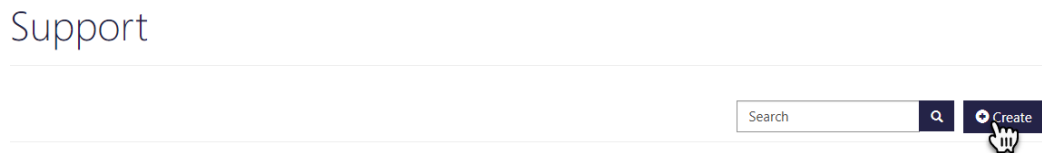
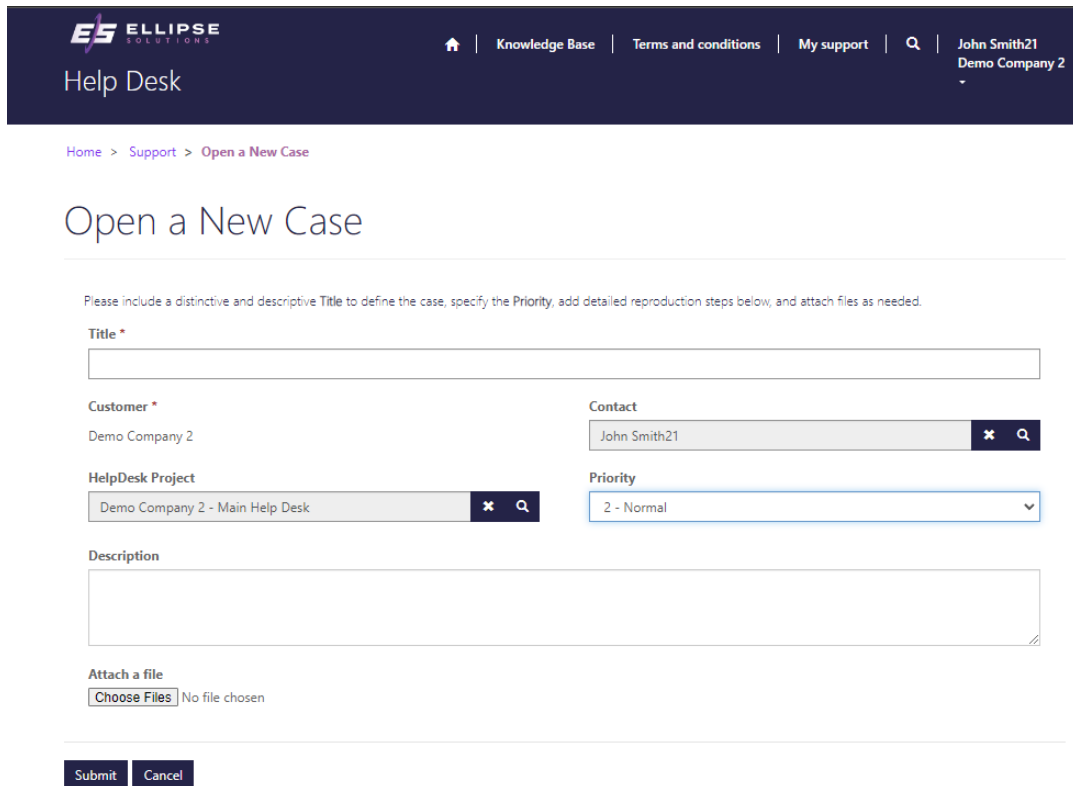


Figure 6 Create button.

The “Open a New Case” form will be displayed. Please follow the instructions on the form to describe the issue or request.



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Home | Knowledge Base | Terms and conditions | My support | Search | John Smith21 Demo Company 2

Help Desk

Home > Support > Open a New Case

Open a New Case

Please include a distinctive and descriptive Title to define the case, specify the Priority, add detailed reproduction steps below, and attach files as needed.

Title *

Customer *
Demo Company 2

Contact
John Smith21

HelpDesk Project
Demo Company 2 - Main Help Desk

Priority
2 - Normal

Description

Attach a file
Choose Files | No file chosen

Submit Cancel

Figure 7 Open a New Case

Important note: Please provide a meaningful description of the issue or request. Also, please make sure that the title is expressive and informative.

On this page, the user will populate the following fields with the appropriate values:

1. Title – Short description of the issue or request.
2. Contact – The main contact for this case. It can be you or one of your colleagues.
3. Help Desk Project – Pick one of the existing help desk projects which is more relevant for the case. Ellipse Solutions may have one or more than one Help Desk Project or Contracts signed with your company.
4. Priority – Pick one of the following priority values:
 - a. 1 – High
 - b. 2 – Normal
 - c. 3 – High

Note: The Priority field defines the Service Level Agreement (SLA) applied to the case. For more details about SLA, please refer to our <https://ellipsesolutions.com/help-desk-sla/> web page.

5. Description – A more detailed description of the issue or request.
6. File attachment – Please attach any files that can help resolve your case. It can be a screenshot (JPG, PNG...) or a document (DOCX, PDF, EXLSX...)
7. Once the information is provided, please click the “Submit” button.
8. The case will be added to the system and your session will be redirected to the “My support” page.

4 Maintaining a case

Once a Help Desk case has been submitted to the Support team, the user is still able to make some changes and adjustments. To update an existing Help Desk Case, please click on the Case Number hyperlink:

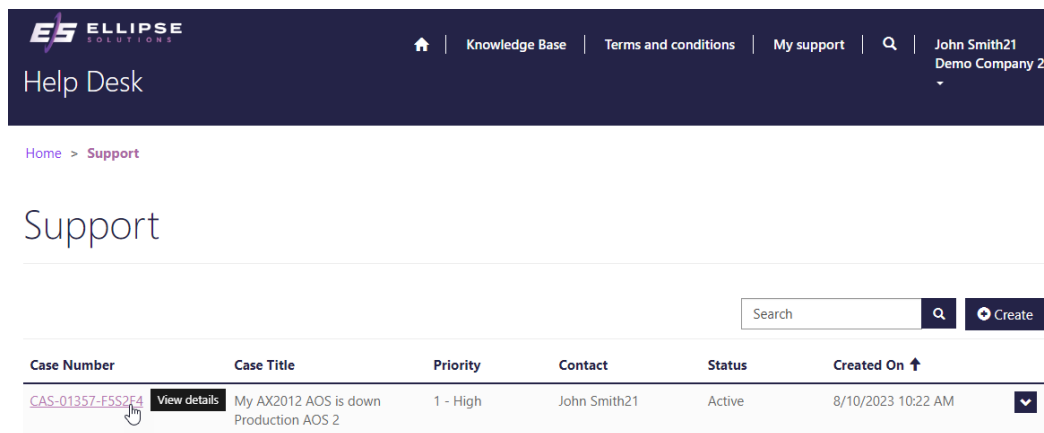


Figure 8 View case details.

On the Case details form, user can perform the following actions:

1. Update the following fields:
 - a. Title
 - b. Contact
 - c. Priority
2. Close the case (mark it as Resolved).
3. Cancel the case.
4. It may happen that new supporting documentation needs to be provided. This can be done by clicking the "Add comment" button. A new comment and attachment will be added to the case this way.

5 Case resolution

All of the details regarding the case resolution will be sent via email to the main contact indicated in the case. Should other people be included in the communication, please specify their email address in the Description or Comments section. All of the emails sent regarding this case will be archived and considered a part of the resolution. The emails can be reviewed in the “Communication history” tab:

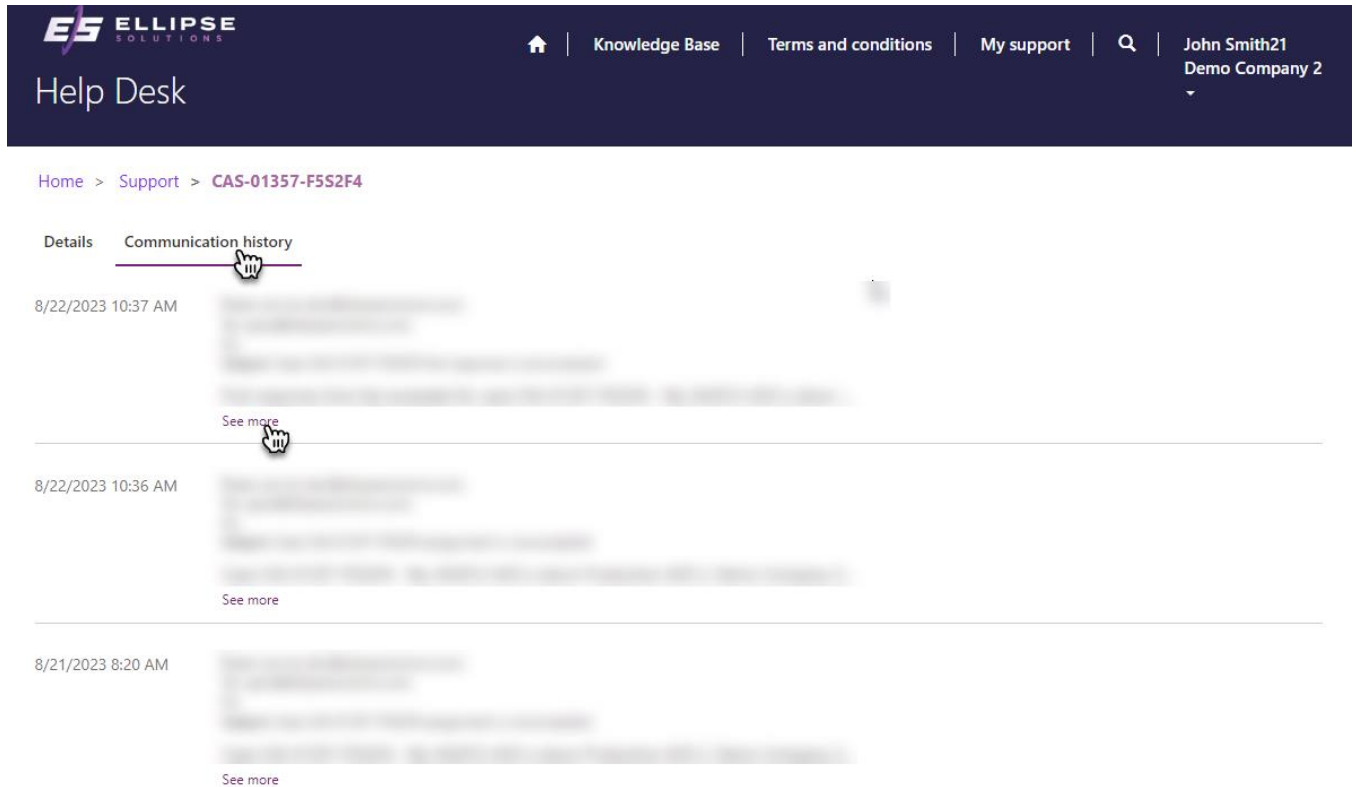


Figure 9 Communication history

Since the email messages can be long, the page will display the first part of the message and the “See more” hyperlink. To review the full message, users will click the “See more” hyperlink.

6 Troubleshooting

It may happen that a user forgot the password, in this case, user should restore the password by clicking the “Forgot your password?” button on the Sign in page:

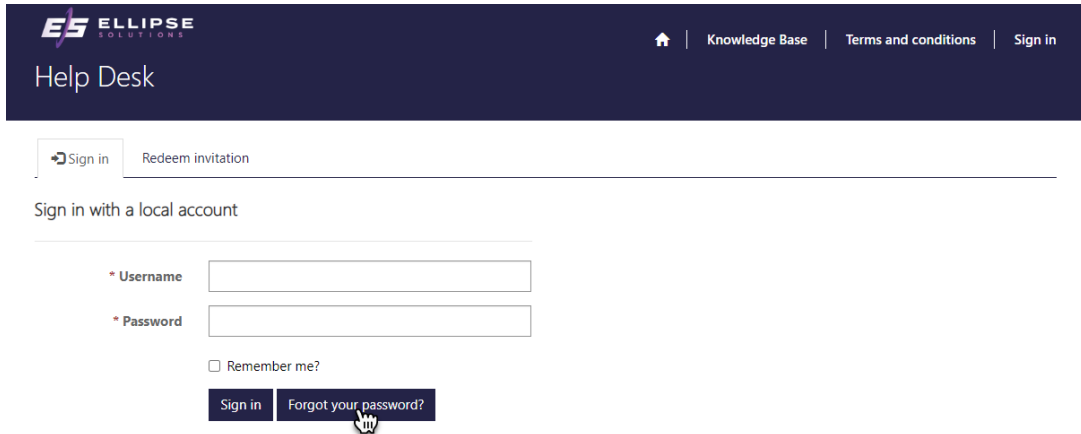


Figure 10 Forgot password.

Users will be redirected to a new page where the email address should be provided. Please specify the corporate email address that was used during the registration process and click the “Send button”.

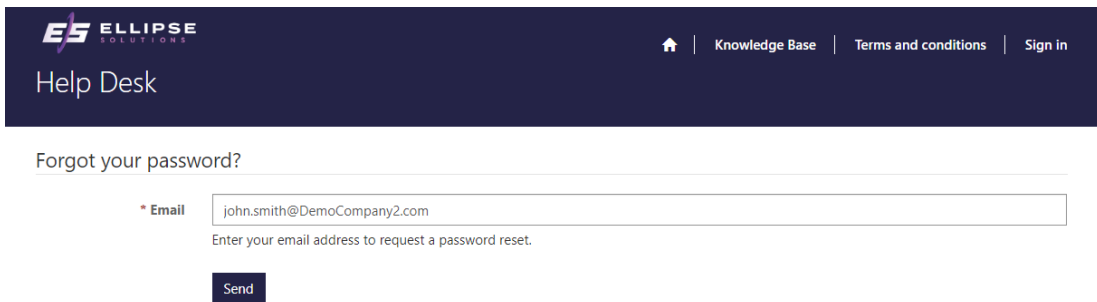


Figure 11 Password reset.

The user will receive an email from the Service Management Team with the instructions for the password reset process. The email message will also include the user Id that was indicated previously during the registration process.

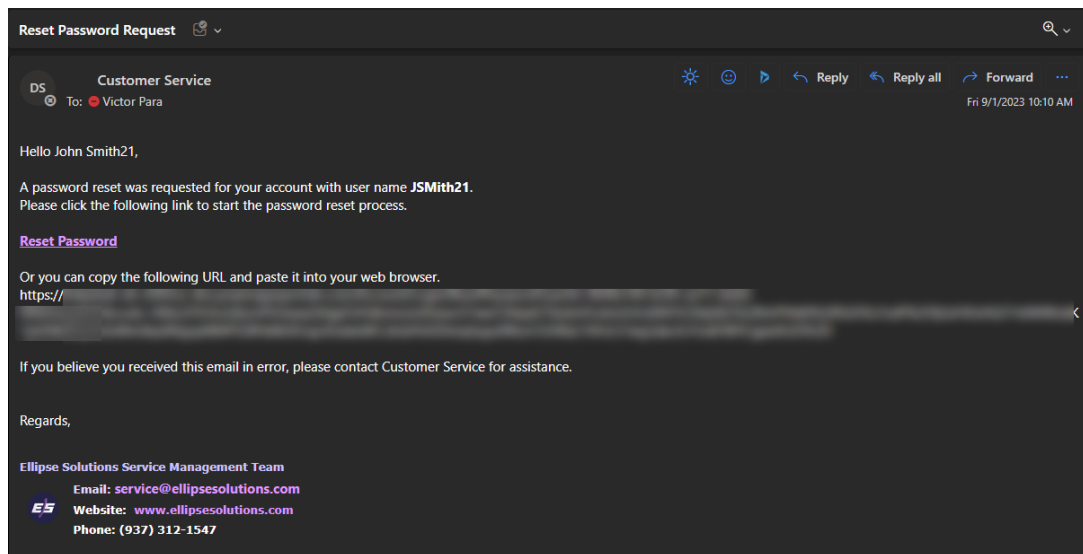


Figure 12 Password reset email.

In case of any other issues related to the functionality of the Help Desk Portal, please don't hesitate to contact our Service Management Team:

Email: service@ellipsesolutions.com
Help Desk Portal: <https://helpdesk.ellipsesolutions.com>
Website: www.ellipsesolutions.com
Phone: (937) 312-1547