ABT Web Helpdesk
User Guide

Web based support call logging

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The purpose of this document is to provide the step by step instructions for ABT Helpdesk service clients on how to use the website to manage the service calls and their users.

For each ABT Helpdesk client, there are 2 levels of access:

1. ***User Admin*** access – this role access can create/manage users within the organisation, as well as log and edit calls. This access should only be given to 1 or 2 of the users within the organisation.

2. ***User*** access - users with this access can create and manage calls within the organisation.

1.   USER ADMIN

LOGGING IN

From website HTTPS://HELPDESK.ABTGROUP.COM.AU/#/LOGIN, enter your username (email address) and password

Login | Enter login details

Username or Email address

Password

☐ Remember my username

Forgot your password?

🔒 Login

Note:
- For forgotten password, click the *Forgot your password* link to have a password reset e-mail delivered to the registered e-mail address.
- After 3 unsuccessful log in attempts, the account will be locked. The user will need to contact the ABT Service Coordinator by calling 02 9878 7111, or sending email to help@abtgroup.com.au to have the account unlocked.

ABT Helpdesk

Forgot Password

The reset password link will be sent to the specified email address below.

Login email address

Send Email

CREATING A NEW USER

Client user with this role access is able to create/manage users within their own organisation to log and edit calls. This access should only be given to 1 or 2 of the users within the same organisation.

1. From the **Service Calls** main screen, click on *Manage* then select *Users*

2. Click on *+ New User*
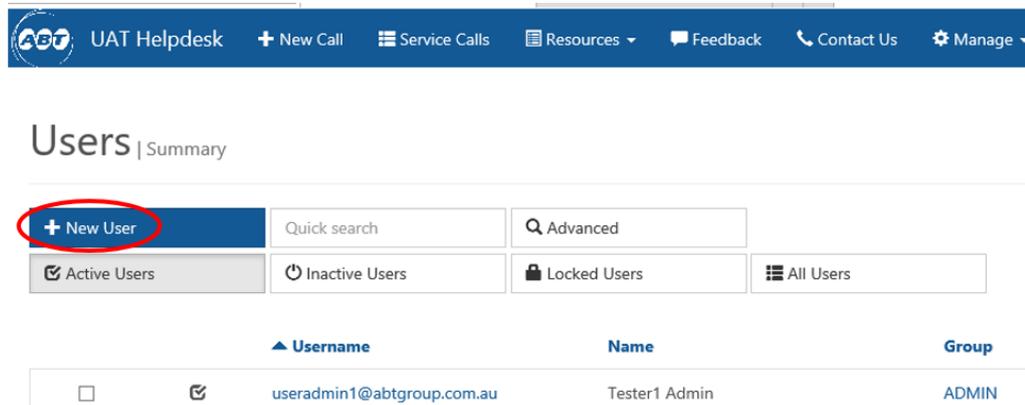
3. Complete all fields in the **User Create New** screen and save
    a. *Role* – Select available role from the drop down options
    b. *Group* – Select the correct company name from the drop down options. In most cases, there is only one company to click. If there are multiple companies from the drop down list, select the non ABTON option for your company.
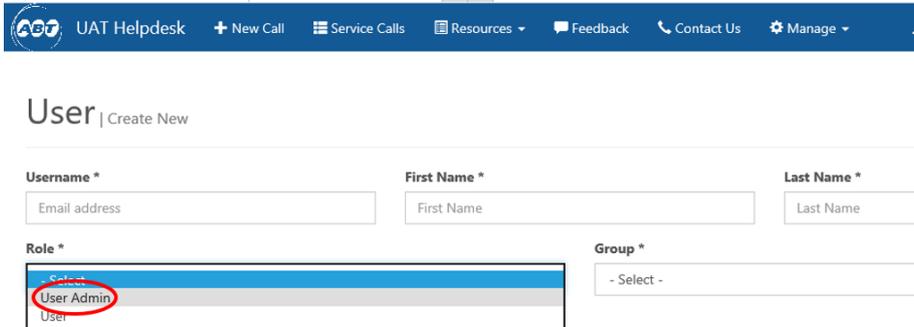
Note:

i.   *Username* is email address of new user

ii.   Roles:

- *User Admin* – allows call creation, view calls list and user creation/management
- *User* – allows call creation, updates and view calls list

iii.   *Group* – Select your default company from the drop down list

iv.   *Password* – tick the box next to *Force password change on the next login*

v.   In *Special Permissions* field, tick all of the boxes for the *User Admin* role created

4. Click *Save* to create the record

5. Once saved, the new user record is displayed in the **Users Summary** screen:
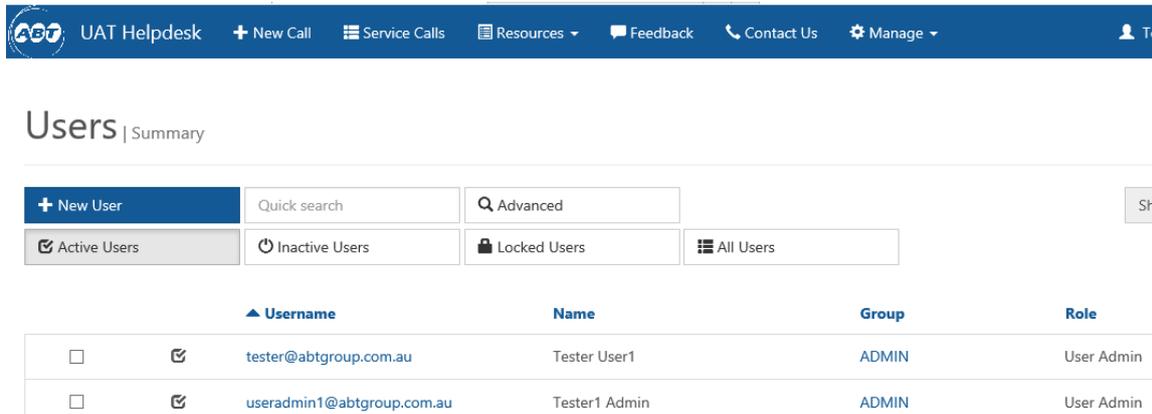
6. New user will receive an email notification with instructions to log on to the system.

SETTING USERS TO INACTIVE

1. From the **Service Calls** main screen, click on *Manage* then select *Users*
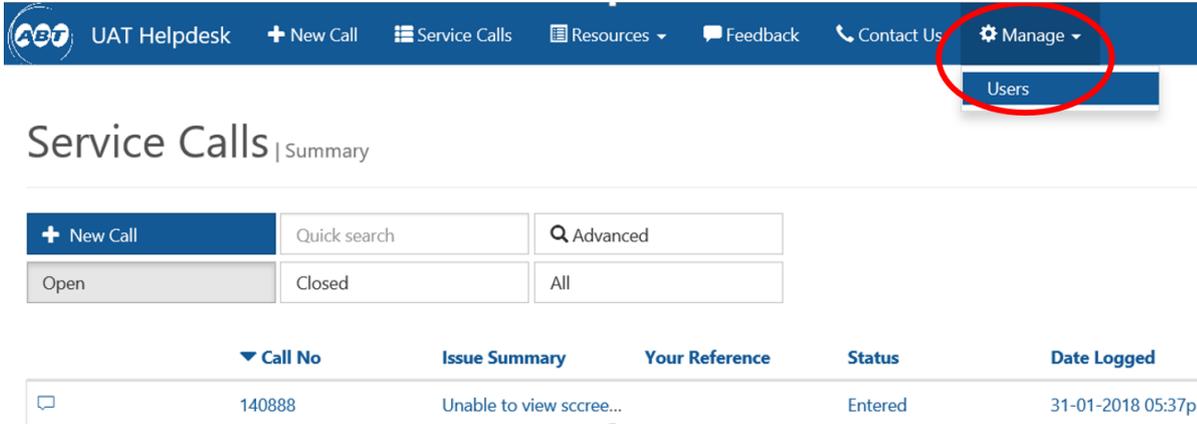
2. Check the left hand box on the user you wish to deactivate and click *Set Inactive*
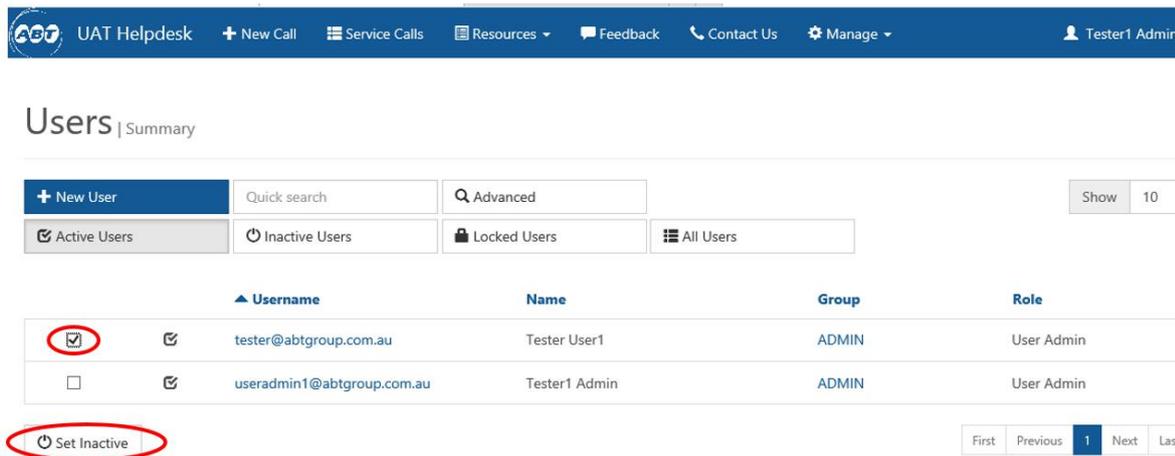
SETTING USERS TO ACTIVE

1. From the **Service Calls** main screen, click on *Manage* then select *Users*
2. Click on *Inactive Users*

3. Select user(s) you wish to activate and click *Activate Selected Users*

4. The same screen also provide the option of **delete** selected users by clicking the *Delete Selected Users* button.

   Note: Only inactive users can be deleted.

UNLOCK USERS

User account will be locked after 3 unsuccessful log in attempts. The person with User Admin access can help the user to unlock the account by following these steps:

1. From the **Service Calls** main screen, click on *Manage* then select *Users*
2. Click on *Locked Users*

3. Select the user(s) you wish to unlock and click *Unlock Selected Users*

4. Once unlocked, back in the Active Users screen, the padlock next to the unlocked user would turn to √

2.   USER

LOGGING IN

1. From website HTTPS://HELPDESK.ABTGROUP.COM.AU/#/LOGIN , enter your username (email address) and password

Login | Enter login details

| Username or Email address |

| Password |

☐ Remember my username

Forgot your password?

🔒 Login

Note:

- If you have forgotten your password, click the *Forgot your password* link to have a password reset e-mail delivered to your registered e-mail address.

- After 3 unsuccessful attempts, the account will be locked. The user need to contact the person with User Admin access with the organisation or ABT Service Coordinator by calling 02 9878 7111, or by emailing help@abtgroup.com.au to have the account unlocked.

ABT Helpdesk

Forgot Password

The reset password link will be sent to the specified email address below.

| Login email address |

Send Email

CREATING A NEW CALL

1. Once logged in successfully, from the *Service Calls Summary* screen, click *+ New Call* button on the top menu bar or within service calls options menu:
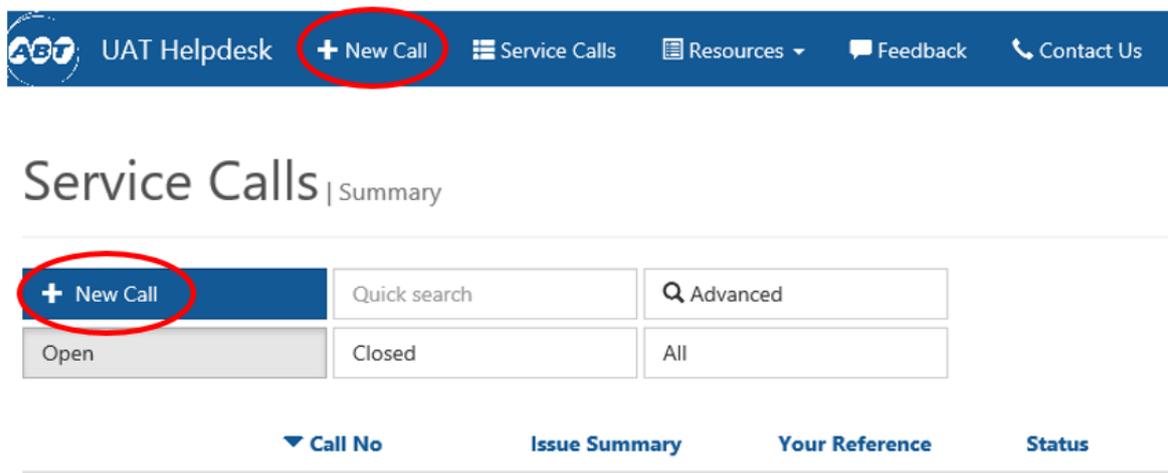
2. In the *Service Calls Create* screen, enter required details and click *Submit*

    Note:

    i. Fields marked with * are mandatory.

    ii. *Customer Code* – This is the pre-assigned Pronto Customer Code from ABT. It is pre-populated and cannot be changed by the user.

    iii. *Customer Name* – User's company name. This field is also pre populated.

    iv. *Attachment* – Attach files and/or screen shots for the fault by clicking *Browse*, and select the file needs to be attached.

    v. *Notification List* – Enter the user email address that needs to be notified for this call. Click *Add to Mailing Lis*t button to add. Once added, the user email address will appear in the *Notification List for this Service Call* field.

    vi. Multiple users can be added to the *Notification List*. However, only users set up to access ABT helpdesk can be added to the *Notification List*.

Service Calls | Create

Call Information

Fields marked with * are mandatory.

Customer Code *
ZZABT10

Customer Name *
ABT ADMIN (10) INTERNAL

Requested By * [53 of 20]
Tester User1

Contact Phone No. * [0 of 18]

Your Reference [0 of 20]

Issue Summary * [0 of 80]

Functionality *

Company or Data Set [0 of 48]

Version *

Program or Module & Function [0 of 48]

Can you reproduce the problem? *

Screen Customiser or custom program(s) used? *
None

Full Description (include steps to recreate issue) * [0 of 40000]

Business Impact [0 of 20000]

Attachments

Filename	Size	Status	Progress
			Browse...

Notification List

User emails
Add to Mailing List

Notification List for this Service Call
Username

Submit   Cancel

3. Once submitted, a *Call Number* is issued. Initially the number generated might be starting with WEBxxxx, this number will change to a 6 digit numeric Pronto call number, eg 140927. This is the number that will be refered to in the email confirmation and is to be used for future reference:

4. In the **Service Calls Summary** screen, new call is added to the list with allocated call number.

UPDATING A CALL

The following fields can be updated after a call is created:

*   *Requested By* – Requester's name
*   *Contact Phone No.* – Requester's phone number
*   *View Conversation* – Adding conversation
*   *Upload Attachments* – Any extra files to be added to the call
*   *Notification List* – Any users to be added/removed for the call

1. From **Service Calls Summary** screen, select the call record that requires update:

2. Click on the record. The selected call detail displays as follow:

3. Click *Edit* within the call

4. ***Service Call Details*** edit screens will appear with available change options:

5. Update details as required and click *Submit*

   View/add conversation

   The conversation feature will allow you to message the assigned engineer of a call that has been logged by you.
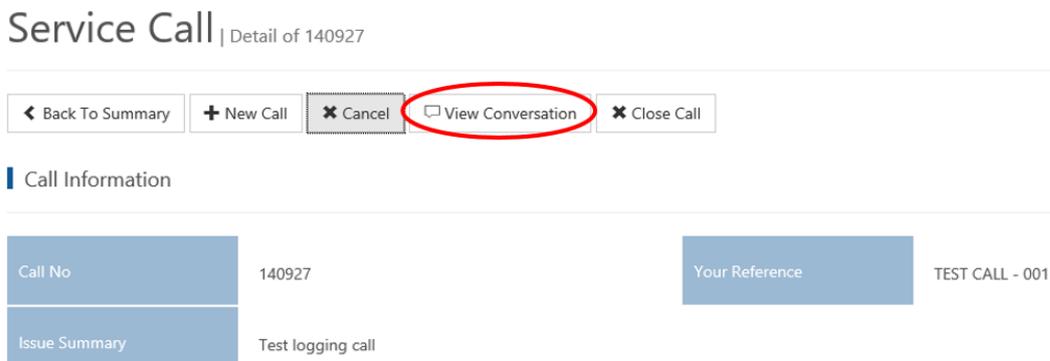
   i. From ***Service Call Detail*** screen, click *View Conversation* within the call

   ii. Enter the message in the conversation box. User can also attach any supporting document in the *Attachments* field if required, and click *Submit*

iii. An email confirmation will also be sent to the users on the notification list with the details of the conversation.

iv. An email will be sent to the user requested the call when assigned ABT consultant has responded to you via conversation feature.

v. To view each conversation attachment, click on *View Conversation* in the ***Service Call Detail*** screen, the conversation attachment link will display within each conversation:

Edit notification list for a service call

The *Notification List* feature allows other users that involved in this call to be informed throughout the call progress. An email message is sent to the users on the *Notification List* each time the call is updated

i.   From **Service Call Detail** screen, click *Edit* and scroll down to the bottom where *Notification List* field is:
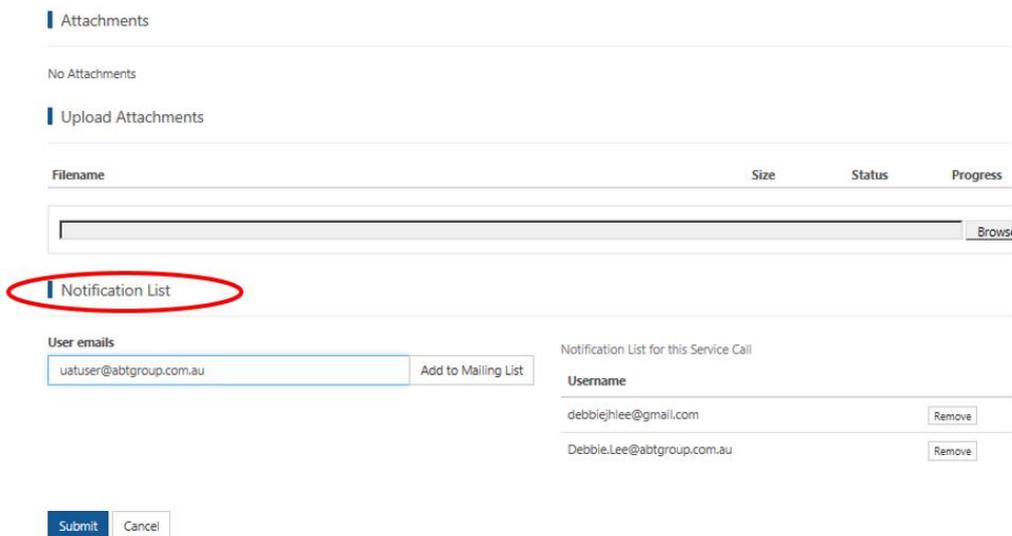
ii.   Fill in the *User emails* field and click *Add to Mailing List* button
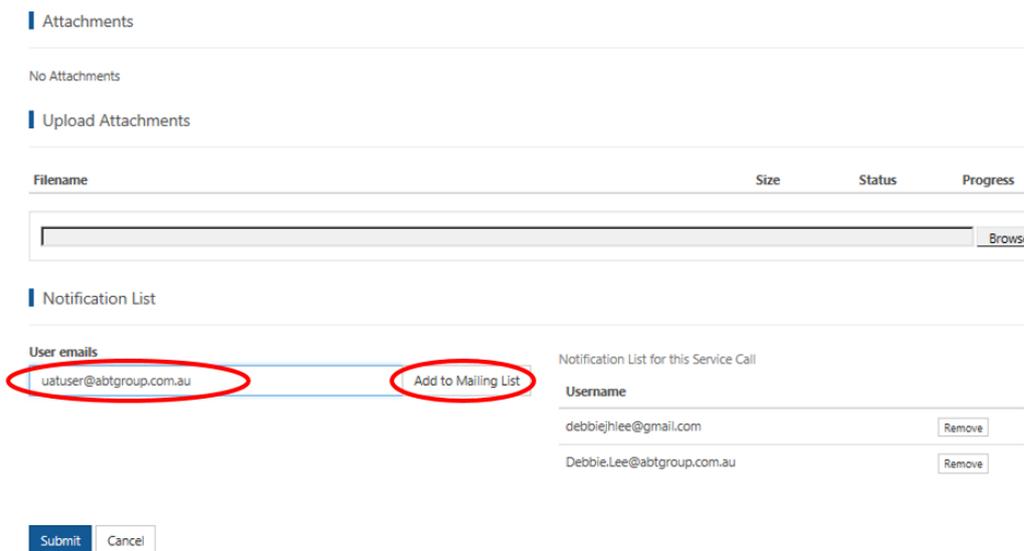
iii.   The new user email will be added to the *Notification List for this Service Call* field:

iv.   To remove any users from the notification list, click on the *Remove* button next to the user name and the user will be removed:

Consultant information

Once an ABT service engineer/consultant is assigned to the call, the name will display in the Consultants field in the Service Call Detail screen:

CLOSING A CALL

1. From the *Service Call Detail* screen, click on the *Close Call* button

2. The *Close service call* pop up screen allows user to input comments before closing the call. Once the comment is entered, click *Close Call* button at the bottom left corner to complete the request.

3. Once the request is saved, an email will be sent out to the originator of the call as well as all users on the *Notification List*, informing the call closure request, including any notes. The call *Status* is changed to *Customer requests call closure*:

Service Call | Detail of 140927

❮ Back To Summary　　＋ New Call　　🗩 View Conversation

▌ Call Information

Call No	140927	Your Reference	TEST CALL - 001
Issue Summary	Test logging call		
Status	Customer requests call closure	Date Logged	12-02-2018 04:29pm
Customer Name	ABT ADMIN (10) INTERNAL	Customer Code	ZZABT10
Requested By	Tester User1	Contact Phone No. *	02 12345678
Urgency	Normal	Call Owner	tester@abtgroup.com.au

Note: Once the call closure request is saved, the user is unable to edit the call any further.

NOTIFICATION LIST

The *Notification List* feature allows to add other Helpdesk users to be notified of any updates on the call. Multiple users can be added to the *Notification List*. However, only users set up to access ABT Helpdesk can be added to the *Notification List*.

From the **Service Calls** detail screen

1. Click *Edit* within the call

2. Once in edit screen, scroll down to the bottom section of the call, in the *Notification List -> User emails* field, enter email addresses of users, click *Add to Mailing List* and then click *Submit*

3. Once the change is saved, the message *"Service call updated"* will appear at the bottom of the screen and the added user address will show in the "*Notification List for this Servie Call*" field:

CONVERSATION

The conversation feature allows user to communicate with the assigned engineer of a call.

1. From *Service Calls Summary* screen, select the call record that requires to add conversation:

2. Click on the record. From the next Service Call Detail screen, click *View Conversation* within the call

3. Enter the message, attach extra files if required, and click *Submit*:

4. A message appears on the top right corner to confirm the conversation is added successfully.
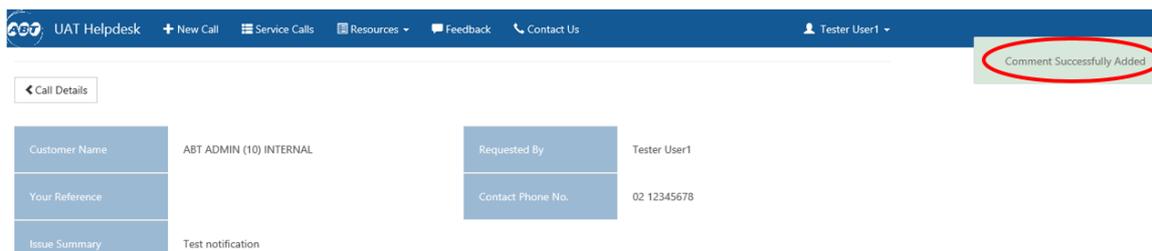
5. An email confirmation will also be sent to the users on the *Notification List* with the details of the conversation.

6. An email will be sent to you when assigned ABT consultant has responded to you via conversation feature

CALL STATUS

Call status are displayed in the *Service Calls Summary* screen as follow:

Status definitions:

- *Entered* – Call is logged and waiting to be assigned to an ABT consultant

- *In Progress* – Call is being worked on and not closed

- *Customer requests call closure* – Call is pending to be closed by ABT administrator

- *Action with customer* – Call is on hold due to customer request

- *Pending Close* – Call is requested to be closed by either the user or ABT consultant

- *Finished* – Call is closed

3. RESOURCES

The resources tab has a variety of downloadable items available

- System Administration and Reference Manuals
- Specification Guides
- BI content catalogues
- ABT helpdesk user manual
- ABT brochures
- Pronto release notes
- Pronto help files
- Pronto tax tables
- Pronto thin clients

4. FEEDBACK

This feature allows you to send any feedback you may have regarding the ABT Helpdesk system