

EUI Helpdesk – *Xperience* User Manual

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1 Portal Language

The portal supports two languages, English and Italian, based on the language of your web-browser:

- If your browser is set to Italian, the portal will load in Italian
- If your browser is set to any other language, it will load in English

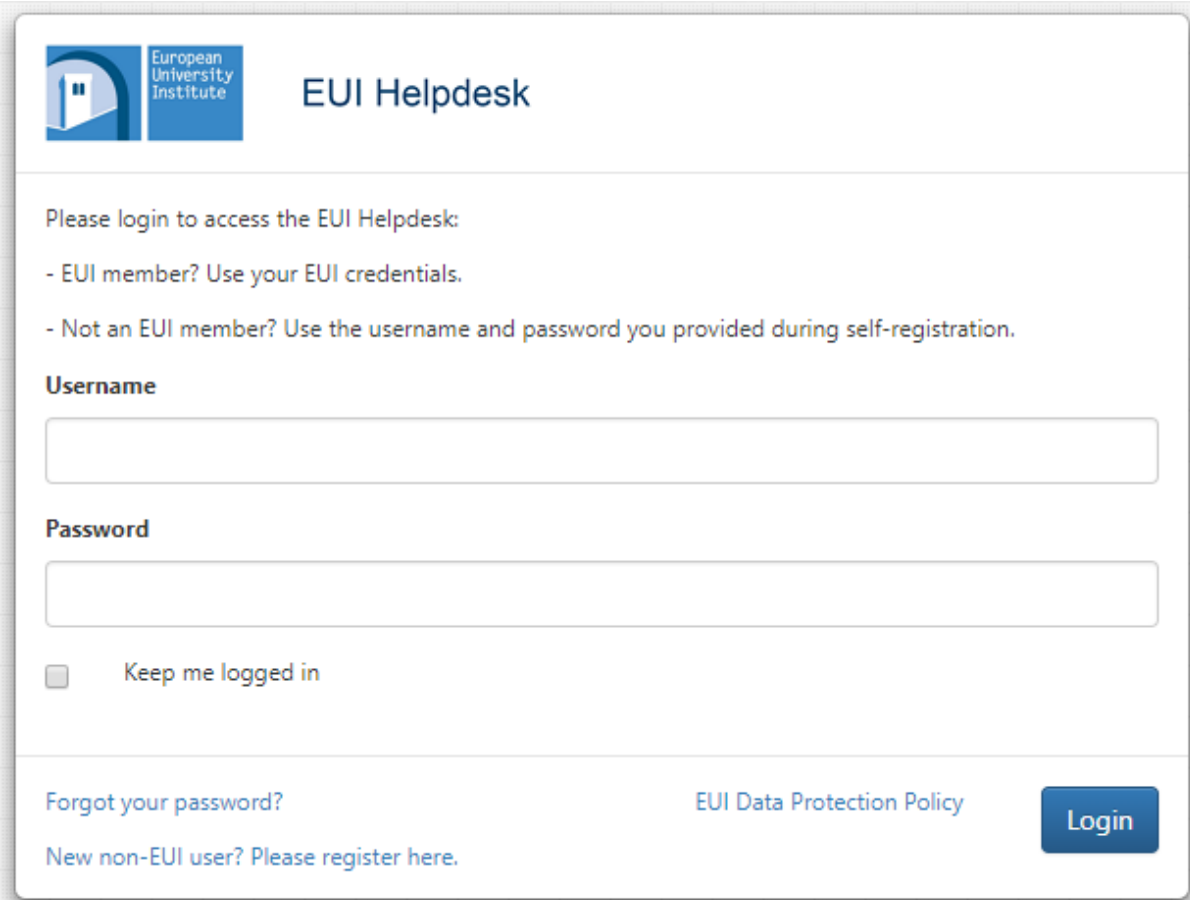
2 Login


2.1 EUI Members

EUI members should login with their EUI credentials and may use either their EUI username (i.e. *jsmith*) or EUI email address (i.e. *john.smith@eui.eu*).

2.2 External Users

External users (non-EUI members) may login using the username and password combination they have chosen during self-registration (see [Chapter 3. Self-Registration for External Users](#)).



 **EUI Helpdesk**

Please login to access the EUI Helpdesk:

- EUI member? Use your EUI credentials.
- Not an EUI member? Use the username and password you provided during self-registration.

Username

Password

☐ Keep me logged in


[Forgot your password?](#) [EUI Data Protection Policy](#) [Login](#)

[New non-EUI user? Please register here.](#)

Figure 1

3 Self-Registration for External Users

External users may access the EUI Helpdesk portal once they have self-registered by clicking on the “New non-EUI user? Please register here” link on the login window and filling in all relevant information:

 **EUI Helpdesk**

Please login to access the EUI Helpdesk:

- EUI member? Use your EUI credentials.
- Not an EUI member? Use the username and password you provided during self-registration.

Username

Password

☐ Keep me logged in

[Forgot your password?](#) [EUI Data Protection Policy](#) [Login](#)

1 [New non-EUI user? Please register here.](#)

Figure 2

Xperience User Registration

Fill in the required fields to create a new account and access to Xperience (all fields are required)

2

Login
This is the identifier (as a nickname) that you'll use to access to Xperience. If you call yourself John Smith, you can write for example: jsmith or john.smith

eMail
This is the email address associated with your account, where you'll receive all notifications from Xperience, and which you can use to communicate with the platform.

First Name
Enter your name.

LastName
Enter your surname.

3

Register

Figure 3

1. Click here to self-register to the portal as external user
2. Fill in all relevant information
3. Click here to self-register

You will receive an email with instructions on how to select the password for the newly created account:

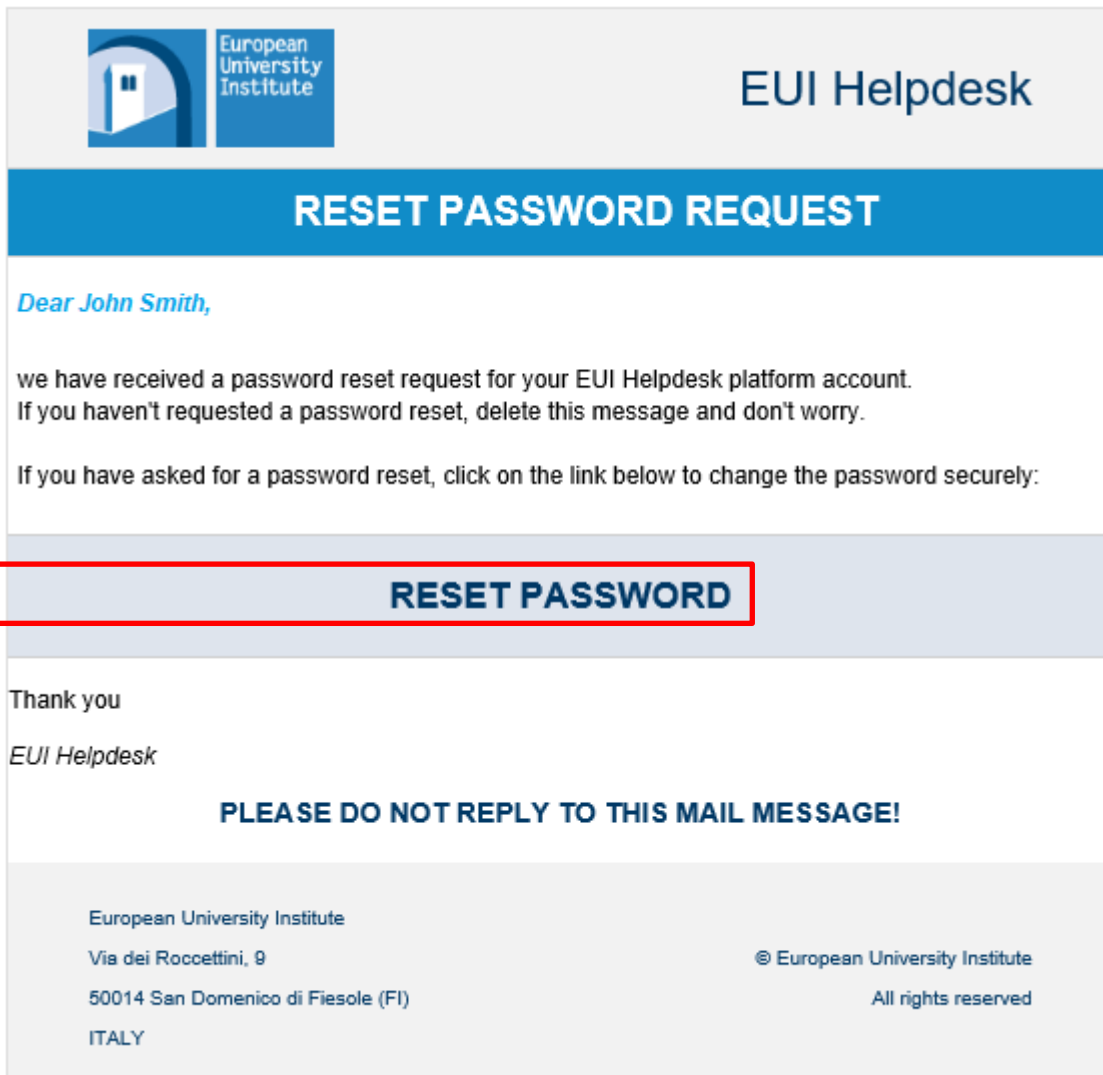
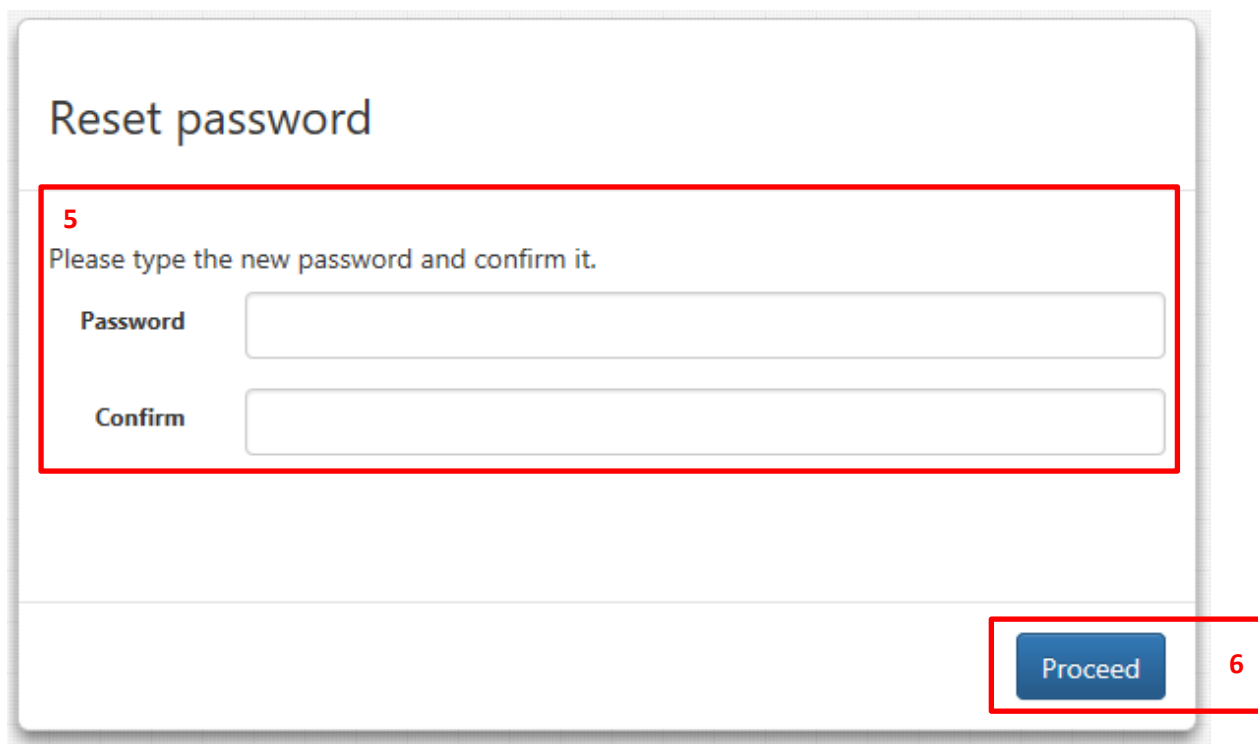


Figure 4

4. Click on Reset Password to create a password for your newly created account



The screenshot shows a 'Reset password' form. A red box labeled '5' encloses the instruction 'Please type the new password and confirm it.' and the 'Password' and 'Confirm' input fields. Another red box labeled '6' encloses the 'Proceed' button at the bottom right of the form.

Reset password

5
Please type the new password and confirm it.

Password

Confirm

6 [Proceed](#)

Figure 5

5. Type your password and confirm it
6. Click here to finalise self-registration

4 Customer Portal Interface

Once logged in, you will land to the **Home** section of the *Xperience* customer portal, from which you can quickly access all its main areas. A blue ribbon underneath the area's name will remind you in which area you currently are.

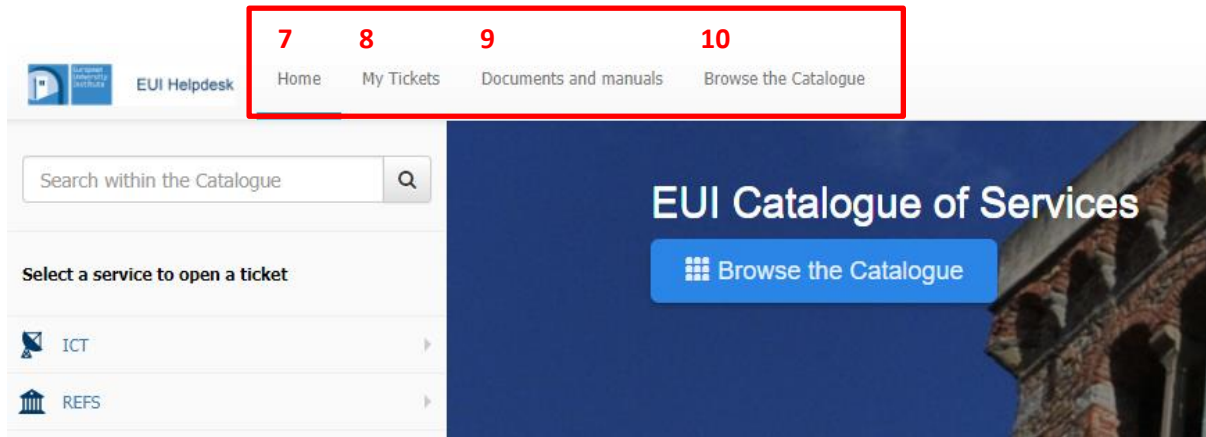


Figure 6

- 7. Home (Landing Page)
- 8. My Tickets
- 9. Documents and manuals
- 10. Browse the Service Catalogue

4.1 Home

The Home area is the main landing page of the customer portal, from which you may:

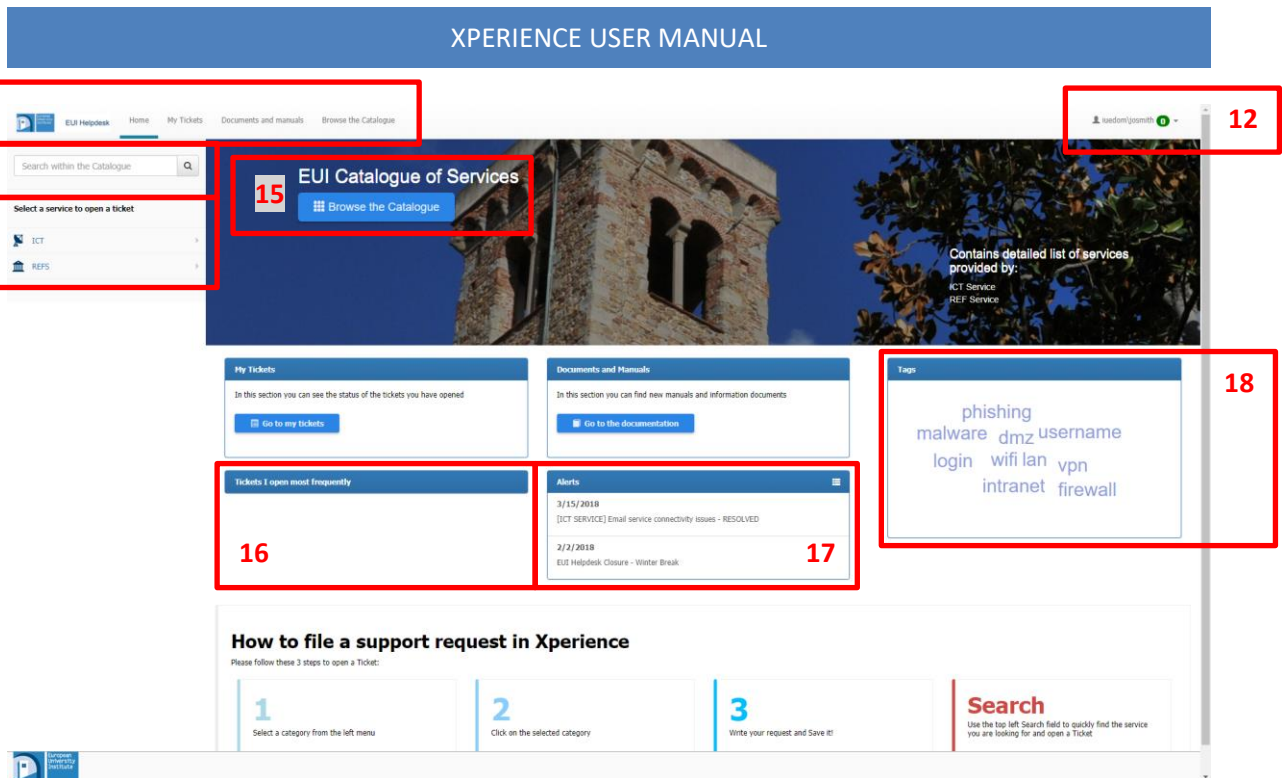


Figure 7

11. Browse the various areas of the portal via its top left menu
12. Edit your (User) Profile via its top right menu
13. Search the Catalogue
14. Open a ticket by selecting a Category (see further below)
15. Quickly access the Service Catalogue (see further below)
16. Check your top Tickets
17. Check Alerts
18. Check (users') top Searches

4.2 My Tickets

Your registered support requests will be shown in this area:

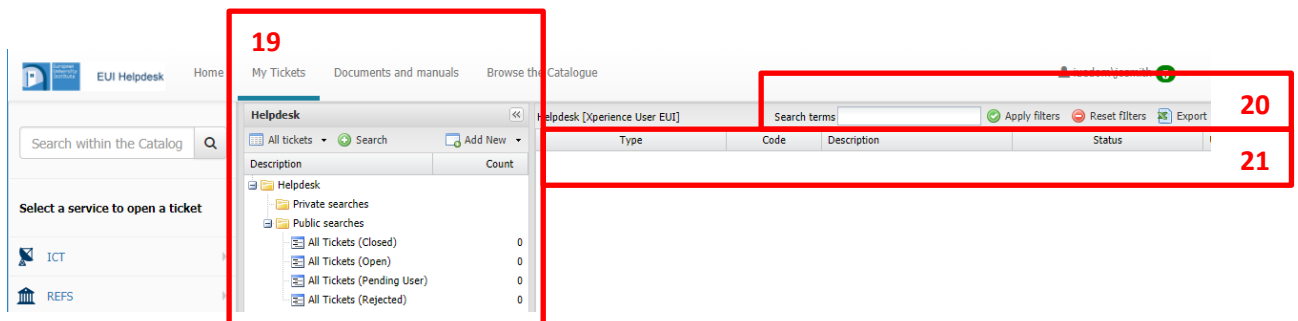


Figure 8

19. Filter pane: click on the small arrow to hide/unhide
20. Use the Search box to quickly find tickets
21. Sort your tickets by clicking on the relevant column (i.e. Status, Date, Category, etc.)

4.3 Documents and Manuals

This area will contain Documents and Manuals for self-solution of support requests.

4.4 Service Catalogue

Here you can browse the Catalogue of Services offered by the Units involved in the EUI Helpdesk (currently Real Estate and Facilities and the ICT Services).

First, click on one of the two Units (REFS or ICT) and the relevant Catalogue will automatically expand downwards: choose (click on) any of the items to find out more details.

5 Opening Tickets

Requests for support are filed as “tickets” which can be opened in several ways.

5.1 By Mail

Simply send an email to the following address:

eui.helpdesk@eui.eu

The Subject of your mail will become the *Description* of your support request whereas the body of your mail will become the *Request Details* of your ticket:

TCK-18-002184 - Ticket User Request - Insert -

Go back Save

Open

General Information

Code TCK-18-002184

22 Description

General Information Attachments

General Information

23 Request Details

User information

User Smith John

Company European University Institute

Department Academic : ECO : Users

Site Search for the site

Figure 9

22. The Subject of any ticket opened by mail will appear here

23. The body of any ticket opened by mail will appear here

You may as well attach images or files to your mail, which will be made available in the Attachments section of your ticket (see [Chapter 6. Interacting with Tickets](#)).

5.2 By Catalogue (Via Portal)

To file a support request based on the services available in the Catalogue, just select (click on) one of from the menu on the left pane of the customer portal:

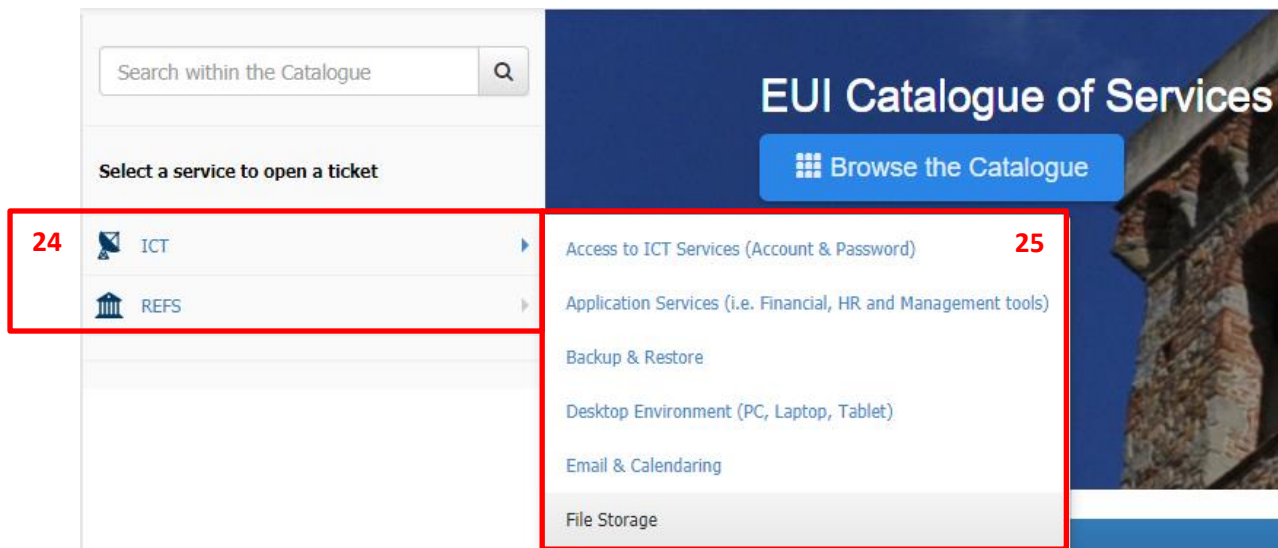


Figure 10

- 24. Select the Service
- 25. Click a Category from its Catalogue

5.3 Opening Tickets on Behalf

You can open tickets on behalf of any user of the same (academic or administrative) Unit as yours.

Please Note: any notification from the Helpdesk will be sent to that user only!

While opening a ticket via the portal, click on your name in the User information box and type the name of the user you would like to open a ticket on behalf of and click on it:

User information

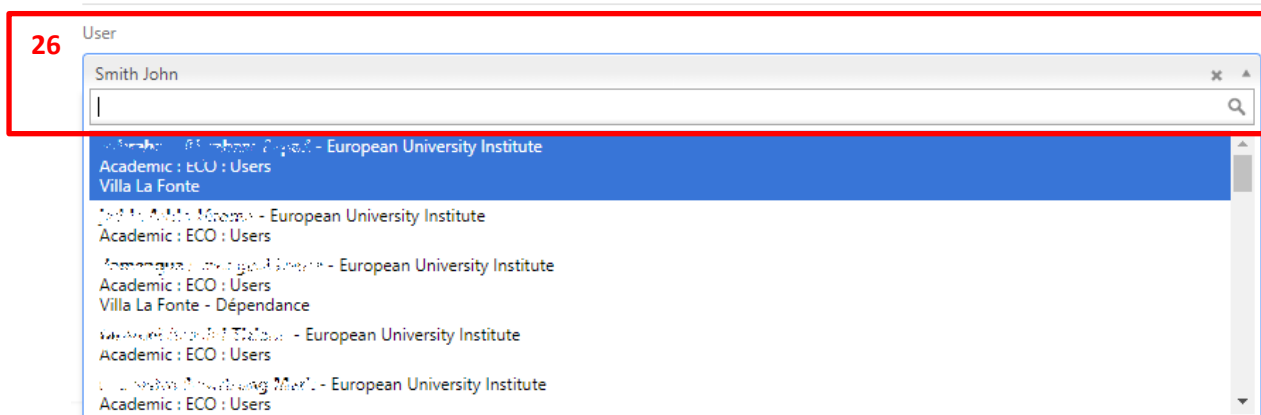


Figure 11

- 26. Click on your name and select a user from the drop-down

6 Interacting with Tickets

You can interact with tickets and/or the Helpdesk in two ways: either via the email Notifications you receive in your mailbox or via Portal.

6.1 Via Mail

Every Notification sent by the Helpdesk has a light blue banner with so-called “Actions”. To interact with the Helpdesk, click on the relevant Action:

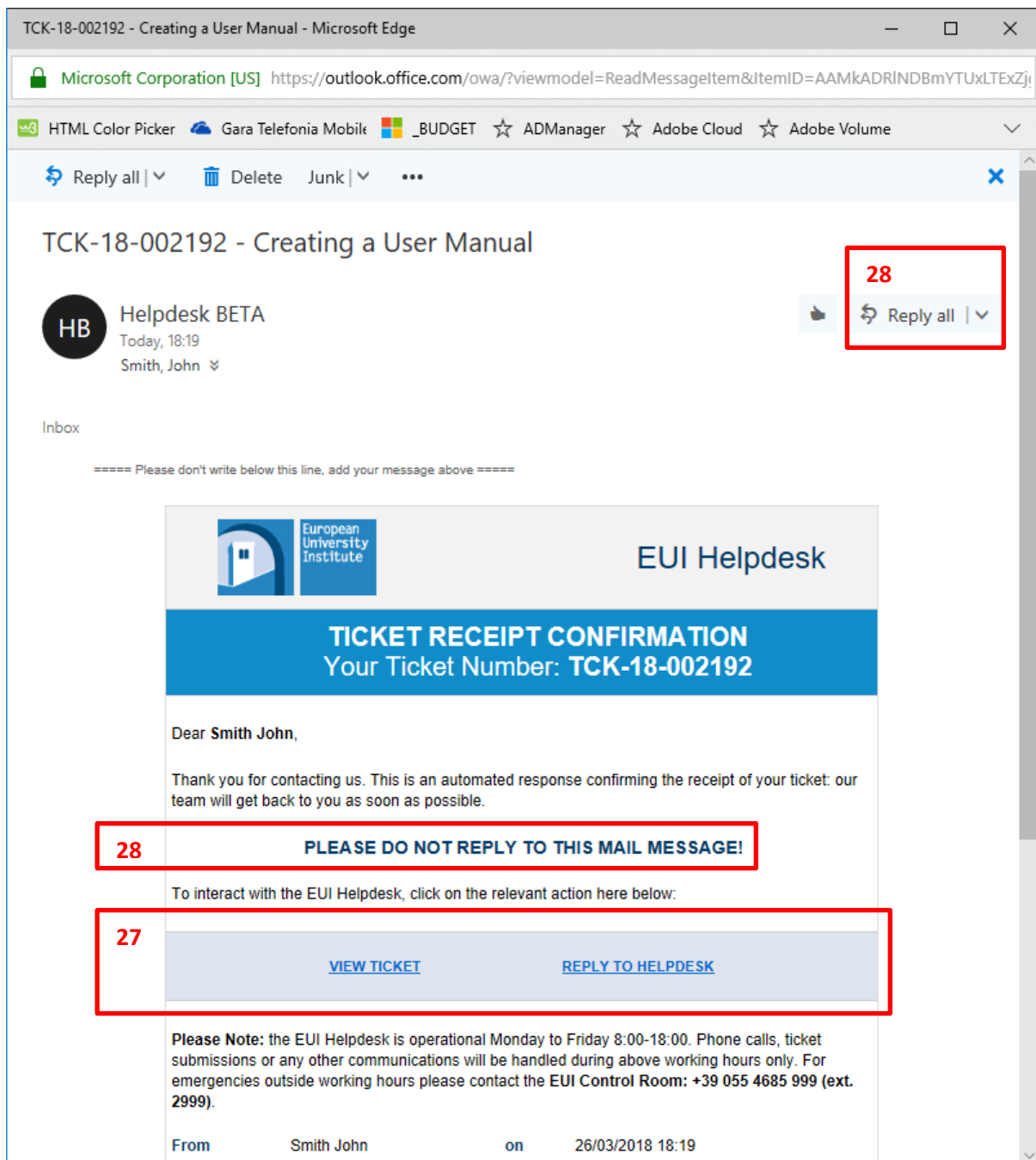


Figure 12

- 27. Click on any of the relevant Actions in this banner
- 28. Do NOT reply/reply to all/forward DIRECTLY to the Notification via your email client!

IMPORTANT: do NOT use Reply/Reply to All/Forward within your email client to interact with the Helpdesk. Failing to do so will generate an automated message informing you of having taken a wrong action!

There are several Actions available, based on the type of Notification you receive:

ACTION	DESCRIPTION
View Ticket	opens up the relevant ticket in the Portal
Reply to Helpdesk	allows you to reply or add comments to the ticket and/or provide info requested by the Helpdesk
Accept Solution	you accept the solution proposed by the Helpdesk, marking the ticket as "resolved"
Refuse Solution	you do not accept the solution proposed by the Helpdesk (you should specify why) and the ticket remains open for further processing
Take Survey	allows you to take a free survey on your user experience with the Helpdesk (see Chapter 9. Ticket Survey for details)

Table 1

For Actions like *Reply to Helpdesk*, *Accept Solution* and *Refuse solution*, a pre-filled email will pop up.

IMPORTANT: make sure to add any additional information ABOVE the following sentence:

"===== Please don't write below this line, add your message above ====="

Failing to do so will generate an automated message informing you of having taken a wrong action!

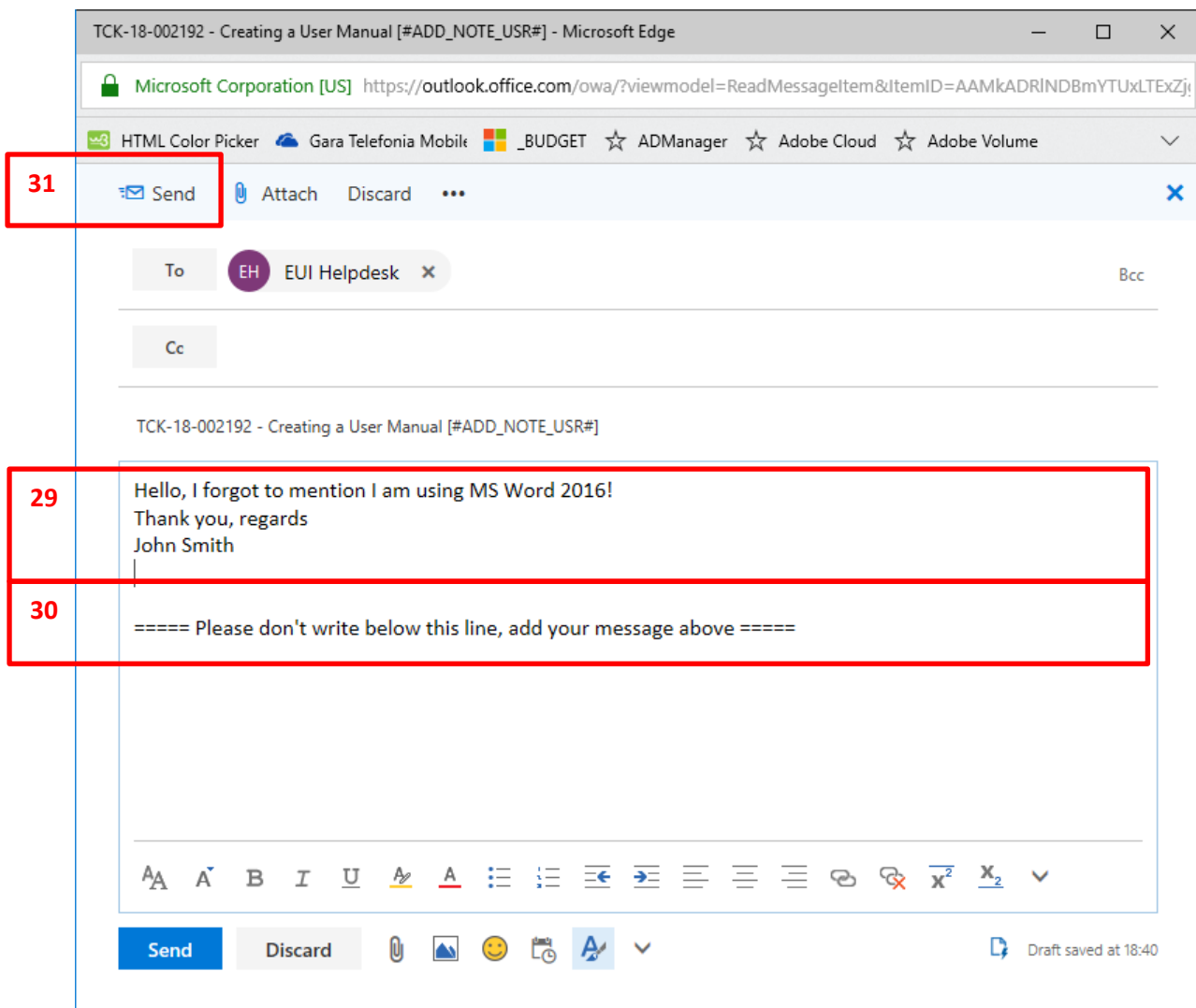


Figure 13

- 29. Place your message in this area
- 30. Do NOT write BELOW this sentence
- 31. Send the message as you normally would

6.2 Via Portal

To interact via Portal, open the relevant ticket and pick the relevant Action from the menu at the top right corner:

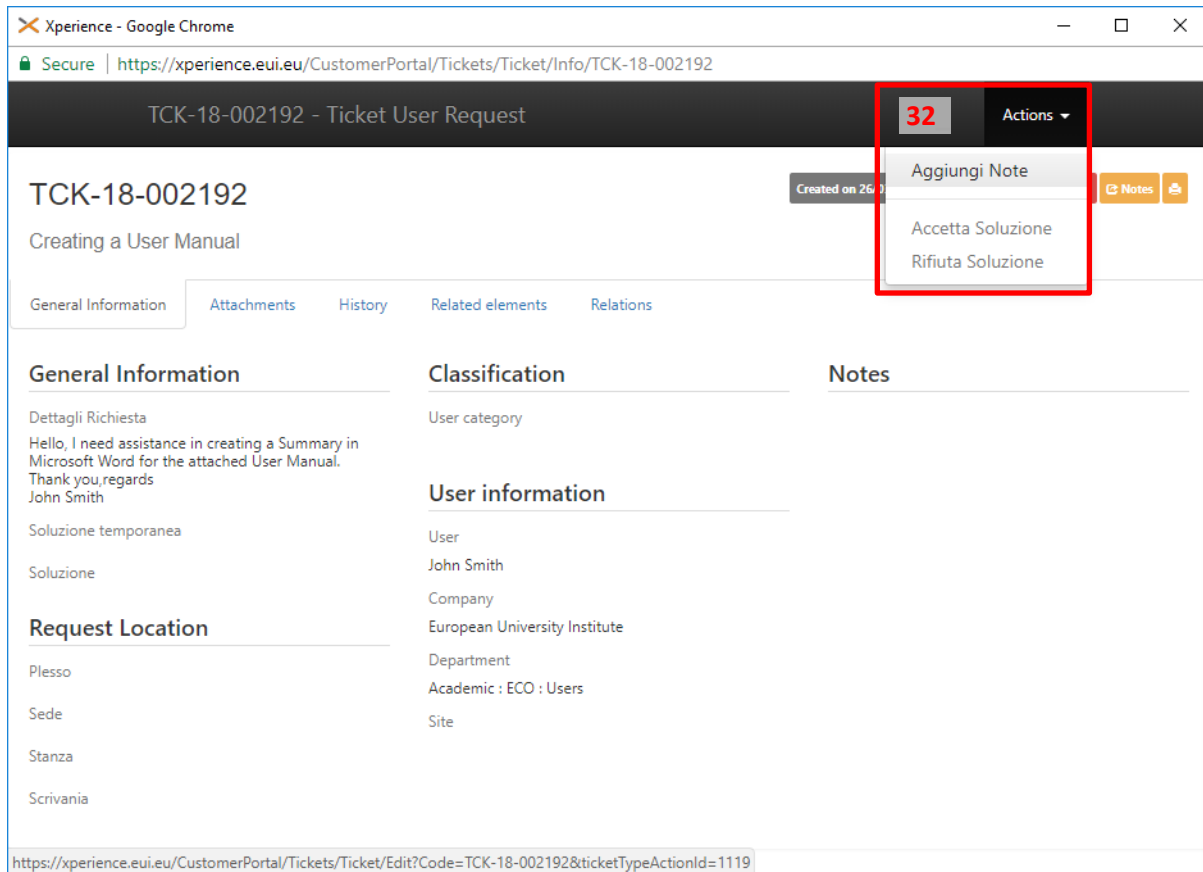


Figure 14

32. Click on any relevant Action to interact with the Helpdesk staff

IMPORTANT: Actions will be enabled (not greyed out) only if relevant for the current status of the ticket (for further details, see [Chapter 8. Ticket History](#)).

7 Ticket Elements

You can browse the various **Elements** of a ticket by clicking the relevant tabs. These will provide you with more details, such as the History of its status (see [Chapter 8. Ticket History](#) for further details) or any parent or sub-ticket (child):

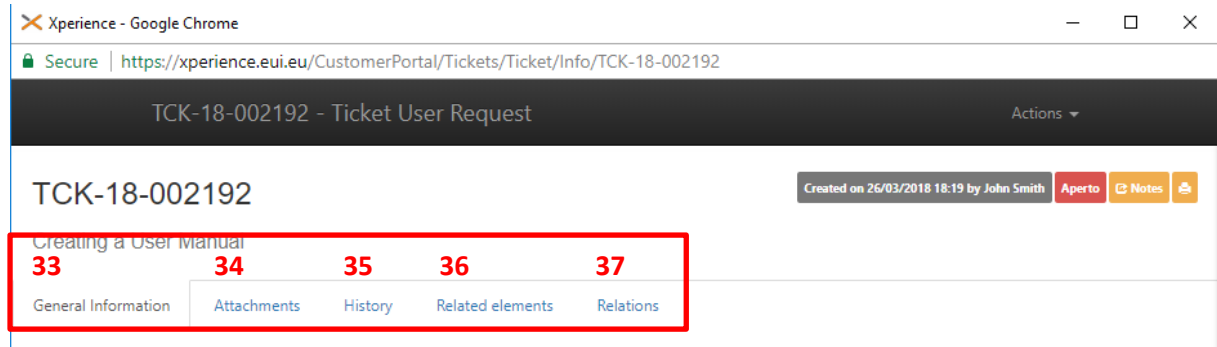


Figure 15

- 33. **General Information** tab provides you with general ticket details such as user information, location and classification (see below for further details)
- 34. **Attachments**’ tab gathers all files, which have been attached to the ticket. If the ticket has been opened by mail, the original mail message will be included as well
- 35. **History** tab shows the various steps the ticket has gone through since its creation (see [Chapter 8. Ticket History](#) for further details)
- 36. **Related elements** tab gathers any parent or sub-ticket (child):
 - a. **Child**: if you have made many different requests in just one ticket, the Helpdesk may break them up in several sub-tickets, called Child tickets
 - b. **Parent**: if several tickets have been opened concerning a major breakdown, the Helpdesk will gather them under a main parent ticket: by resolving the parent ticket, all “children” will be closed accordingly
- 37. **Relations** shows links to other relevant items such as assigned EUI equipment in a visual mode (TO BE IMPLEMENTED).

The **General Information** tab provides you with an overview of the main ticket details. Most of the time this will be the only tab you may need to access to understand the status of your request:






General Information		Classification	Notes
38	Dettagli Richiesta Hello, I need assistance in creating a Summary in Microsoft Word for the attached User Manual. Thank you, regards John Smith	User category ICT : Software Catalogue	42 John Smith - Soluzione 27/03/2018 10:44 accettata Your instructions worked well, thank you very much, ticket can be closed! John Smith EUI Helpdesk - Preso 27/03/2018 10:41  in carico Helpdesk is taking back ownership of the request. EUI Helpdesk - 27/03/2018 10:40  Attività Completata [Operativo] Second level has finished working on this EUI Helpdesk - 27/03/2018 10:40  Attività Iniziata [Operativo] Second level is starting to work on the request. EUI Helpdesk - Preso 27/03/2018 10:39  in carico Second level is taking ownership. EUI Helpdesk - Preso 27/03/2018 10:30  in carico Helpdesk is taking ownership of this ticket.
39	Soluzione temporanea Soluzione In order to create a summary in Word 2016, follow these steps: 1. abc 2. def 3. ghi Please let us know if the above works for you, kind regards XYZ EUI Helpdesk	User information User John Smith Company European University Institute Department Academic : ECO : Users Site	
42	Request Location Plesso VP - Poggiolo Sede VP-VP - Villa Il Poggiolo Stanza VP092 - VP092 - 32 Ufficio 32 Scrivania 22376 - B		

Figure 16

38. Your original request is shown here
39. In this field you may find the proposed workaround or solution
40. This is the Category of your request as identified by the Helpdesk
41. Your user information
42. Any exchange between you and the Helpdesk will be shown here

8 Ticket History

You may check the steps (Actions and Status) your ticket has gone through anytime by selecting the **History** tab (see [Chapter 7. Ticket Elements](#)):

General Information Attachments History Related elements Relations				
Ticket Histories				
Person	Created on ▼	Action 43	Status 44	
John Smith	27/03/2018 10:44	Solution Accepted	Resolved	
EUI Helpdesk	27/03/2018 10:43	Solution Proposed [with Feedback]	Pending User	
EUI Helpdesk	27/03/2018 10:41	Taken Over	Assigned	
EUI Helpdesk	27/03/2018 10:40	Task Completed	Task Completed	
EUI Helpdesk	27/03/2018 10:40	Task Initiated	In Progress	
EUI Helpdesk	27/03/2018 10:39	Taken Over	Assigned	
EUI Helpdesk	27/03/2018 10:30	Taken Over	Assigned	
John Smith	26/03/2018 18:19	Submitted	Open	

Figure 17

- 43. Actions taken by the Helpdesk / Operators / User will be listed here in chronological order
- 44. The Status of your ticket will be shown here

Following is the description of available **Actions**:

- **Submitted** refers to the opening (creation) of the ticket
- **Edited** refers to the editing of the original support request
- **Taken in Charge** refers to the request being taken in charge by the helpdesk and/or technical unit
- **Reassigned to Helpdesk** refers to a ticket being reassigned to the Helpdesk by a technical unit
- **Requested Info** refers to additional information to be provided to Helpdesk by the user or Third Party
- **Information Provided** refers to additional information provided to the Helpdesk by the user or third Party
- **User Updated** refers to the Helpdesk updating the user of the ticket
- **Info Added** refers to additional information provided by the user via Reply to Helpdesk action
- **Task Assigned** refers to the ticket being assigned to the operational technical unit
- **Task Initiated / Completed / Suspended / Not Executable** refers to the action(s) carried out by the technical units
- **Solution Proposed [with Feedback]** refers to the Helpdesk informing the user of a proposed solution to be accepted or refused
- **Solution Provided [without Feedback]** refers to a ticket being closed not needing acceptance or refusal by the user
- **Solution Accepted / Refused** refers to the user's feedback on the Proposed Solution
- **Cancelled** refers to the cancellation of a ticket
- **Authorisation Requested** refers to a ticket being submitted for approval to the relevant manager
- **Request Authorised / Refused** refers to the approval/refusal of the submitted request by the manager

Following is the description of the various **Statuses**:

- **Open** = ticket has been submitted and received by the Helpdesk
- **Assigned** = ticket has been assigned to the technical unit in charge of processing it
- **In Progress** = ticket is being processed by the operator in charge
- **Task Completed** = ticket has been processed by the operator in charge
- **Task On Hold** = ticket has been put on hold by the operator in charge
- **Pending User / Third Party** = Helpdesk is awaiting additional info from the user / Third Party
- **Replied by User / Third Party** = user / Third Party provided requested information
- **Authorisation / Approval Pending** = awaiting authorisation / approval from a Manager
- **Authorisation Approved / Denied** = authorisation has been approved / rejected
- **Approval Authorised / Denied** = approval has been authorised / rejected
- **Pending Estimate Approval** = Helpdesk is awaiting approval of a cost estimate for a **Work Order**
- **Estimate Approved / Refused** = estimate for a **Work Order** has been approved / rejected
- **On Hold** = ticket is on hold (S)
- **Resolved** = ticket has been resolved and closed
- **Cancelled** = ticket has been cancelled (i.e. not pertinent to the EUI Helpdesk)
- **Closed** = ticket has been closed (i.e. no follow up from user)

9 Ticket Survey

Upon reception of the Resolved Ticket Notification, you will be offered the chance of taking an “OK-KO” satisfaction survey by selecting the *Take Survey* action.

By doing so you will be redirected to the Helpdesk portal where you can express your opinion as well as add an optional comment:

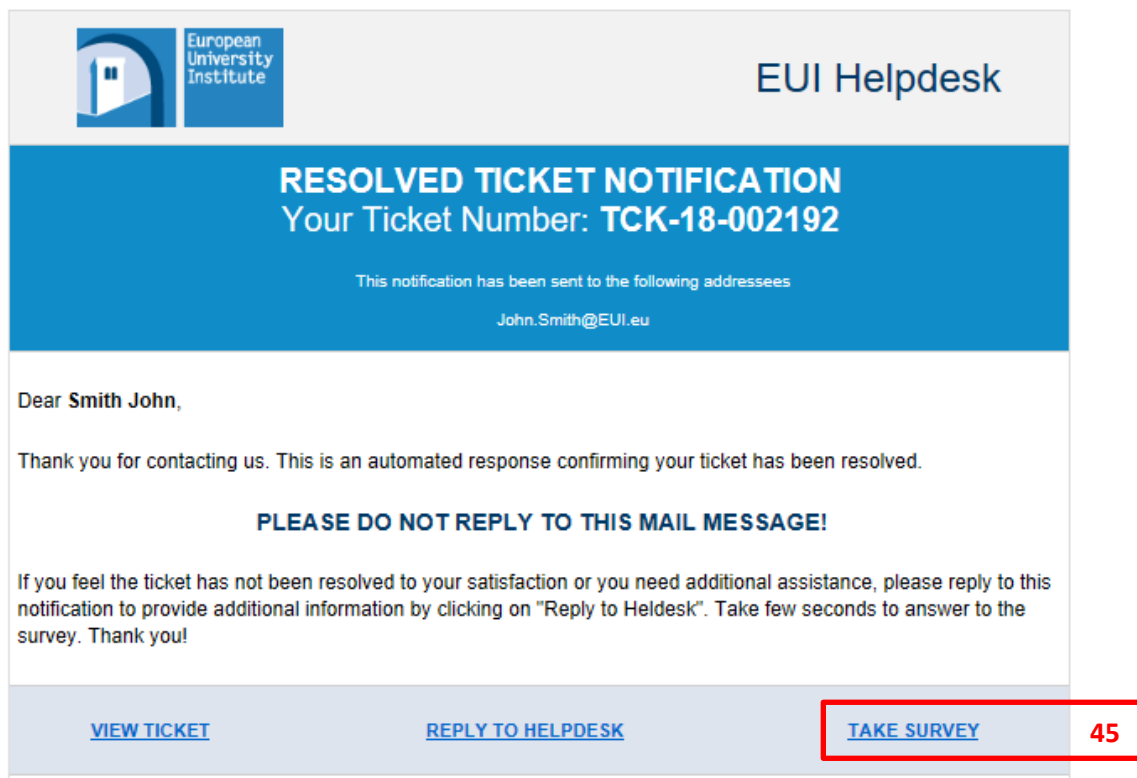


Figure 18

45. Click here to take the optional survey

The image shows a 'User Satisfaction Survey' form. At the top is a header 'User Satisfaction Survey'. Below it is a section titled 'Question' with the text 'How would you rate your experience with the EUI Helpdesk service?'. This section is annotated with a red box and the number 46. Below the question are three radio button options: 'A. Good :)', 'B. Average :|', and 'C. Poor :('. The second section is titled 'Share your thoughts with us!' and contains a large text input area. This section is annotated with a red box and the number 47. At the bottom right of the form is a green 'Save' button, which is annotated with a red box and the number 48.

Figure 19

- 46. Express your opinion here by selecting one of the options (😊, 😐 or 😞)
- 47. Add your comments here (optional)
- 48. Confirm by clicking on the Save button

10 User Profile

Although not mandatory, we kindly invite you to edit your *Profile* by adding additional contact details such as an **alternative email address** and/or a **mobile phone number**. This will facilitate support in case your EUI contacts are not accessible.

To do so, click on your name in the top right corner of the Customer Portal and select *My Profile*:

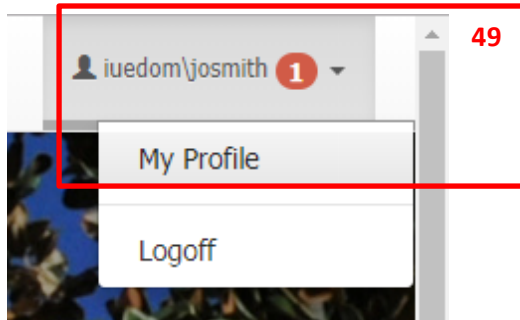


Figure 20

In your *My profile* page, click on the *Edit* button on the bottom right corner:

Contacts

Telephone
Telephone Int.
Fax
Mobile
eMail John.Smith@EUI.eu
Additional email

Edit

50

49. Click on your name followed by a click on *My Profile*

50. Click on *Edit*

Add your **Mobile phone number** (we kindly invite to include the Country Code and/or your **additional email address**, followed by a click on *Save* to confirm:

Contacts

Telephone

Telephone Int.

Fax

Mobile 51

eMail John.Smith@EUI.eu

Additional email 52

Cancel 53

Figure 21

51. Add your additional phone number in this field
52. Type your additional email address here
53. Click on *Save* to confirm

PLEASE NOTE: providing additional contact information is OPTIONAL but failing to do so the Helpdesk cannot get in touch with you in case your account has expired or you have forgotten your password (as you won't be able to access the portal for a follow up and/or access your EUI email either)!

11 Password Forgotten

In case you forgot your password you can click on the “*Forgot your password*” link on the login page:

Please login to access the EUI Helpdesk:

- EUI member? Use your EUI credentials.
- Not an EUI member? Use the username and password you provided during self-registration.

Username

Password

☐ Keep me logged in

54 [Forgot your password?](#) [EUI Data Protection Policy](#) [Login](#)

[New non-EUI user? Please register here.](#)

Figure 22

54. Click on this link to reset your password

By clicking the afore-mentioned link, the system will:

- For EUI members:** assign a Ticket to the Helpdesk who will get in touch with you via **alternative phone or email** contact, as long as they have been provided in your **My Profile** (see [Chapter 10. User Profile](#)).

Please Note: if such information has not been provided, you are kindly invited to call the EUI Helpdesk by phone on ext. 2600 (+39 055 4685 600).

- For non-EUI users:** send a password reset notification (email) to your registered email address with detailed instructions on how to create a new password.