Baden Württemberg Support Portal

User Guide

Baden-Württemberg Support Portal for:

bwUniCluster   bwSync&Share
ForHLR   bwForCluster   bwFileStorage

Version 1.0

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1. Access the Baden Württemberg Support Portal

You can access the Baden Württemberg Support Portal using the login of your home institution (e.g. your University) through the Shibboleth authentication.

In the public page you will see a section "Login via Shibboleth" (see Fig. 1). Click on the link and you will be redirected to the WAYF (Where Are You From) service where you can select your home institution for further redirection. Afterwards you can insert login and password of your home institution to be redirected back to the homepage of the Baden Württemberg Support Portal.

Below are described the main steps during the Shibboleth authentication.

Step 1: User accesses the resource

The user starts by attempting to access the helpdesk hosted by a web server that has Shibboleth content protection enabled. S/he goes to the helpdesk login page and clicks on "Login via Shibboleth" link (see Fig. 1). The resource monitor determines if the user has an active session and, if no, redirects her/him to the Service Provider in order to start the Single Sign-on (SSO) process.
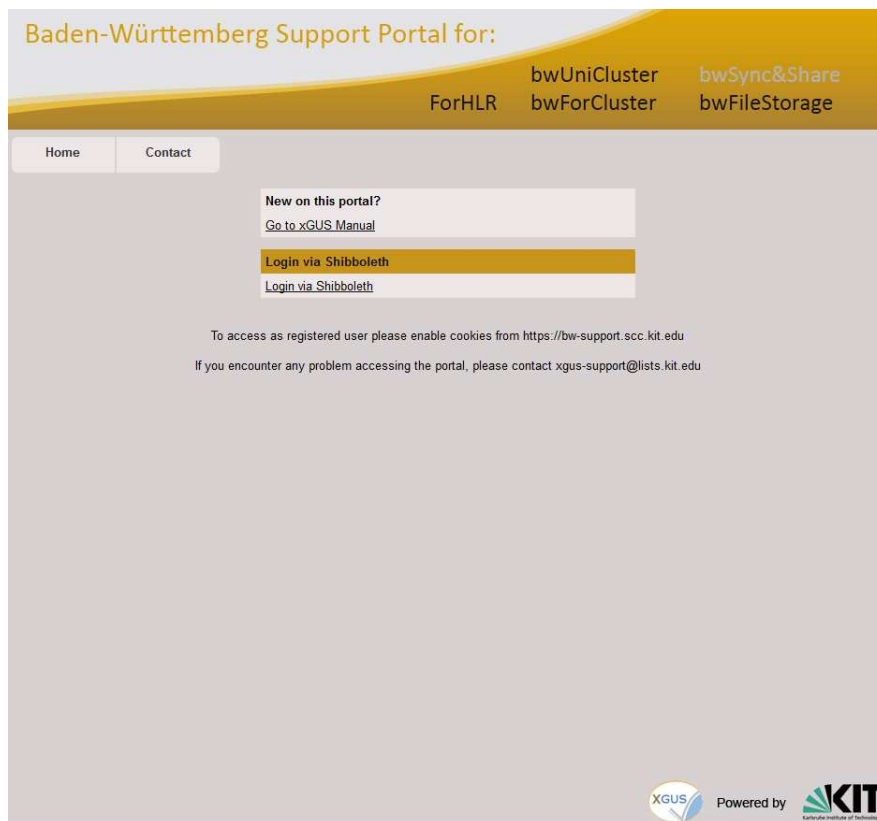

Fig. 1 – Shibboleth authentication – User accesses the resource

Step 2: Service Provider issues Authentication Request

The user arrives at the Service Provider which prepares and sends an authentication request to the Identity Provide, redirecting the user to the Where Are You From service of the DFN (Deutsches Forschungnetz) federation (see Fig. 2). There s/he can select his home organization.

Fig. 2 - Shibboleth authentication – WAYF (Where Are You From) service of the DFN Federation

Step 3: User Authenticated at Identity Provider

When the user arrives at the Identity Provider it checks if s/he has an existing session. If yes, s/he can go to the next step. If not, the Identity Provider authenticates her/him (e.g. by prompting for, and checking, a username and password) (see Fig. 3) and the user proceeds to the next step.
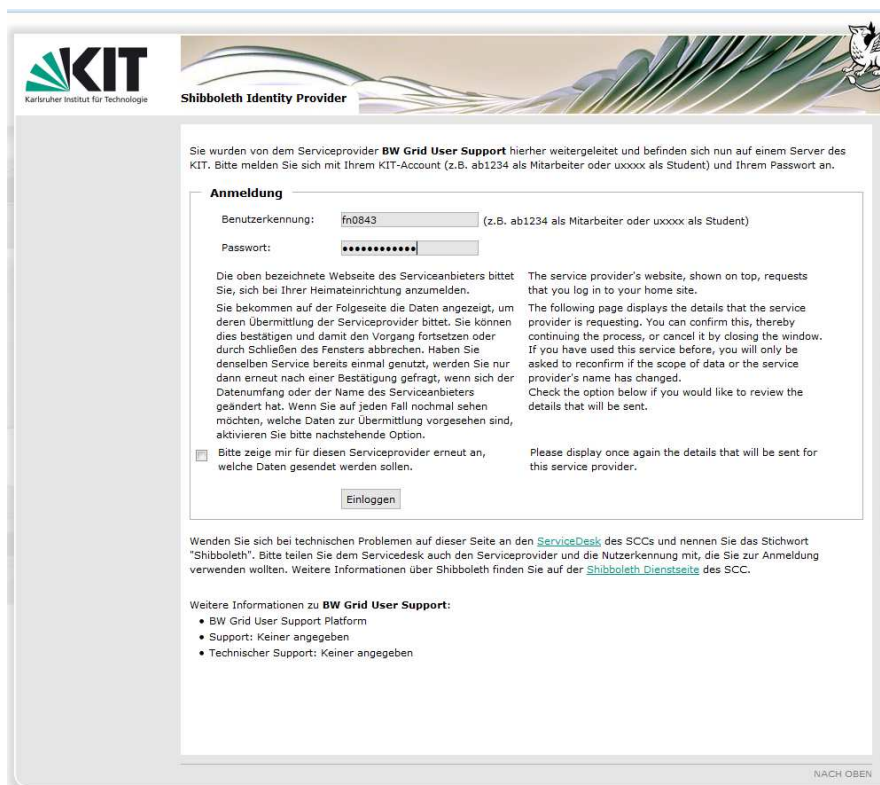

Fig. 3 – Shibboleth authentication – User authenticated at her/his home organization

Step 4: Identity Provider issues Authentication Response

After identifying the user, the Identity Provider prepares an authentication response and sends it and the user back to the Service Provider.

Step 5: Service Provider checks Authentication Response

When the user arrives with the response from the Identity Provider, the Service Provider will validate the response, create a session for the user, and make some information retrieved from the response (e.g. the user's identifier) available to the protected resource. After this, the user is sent to the resource.

Step 6: Resource returns content

As in Step 1, the user is now trying again to access the protected resource, but this time the user has a session and the resource knows who s/he is. With this information the resource will service the user's request and send back the requested data, in this case the homepage of the helpdesk (see Fig. 4).
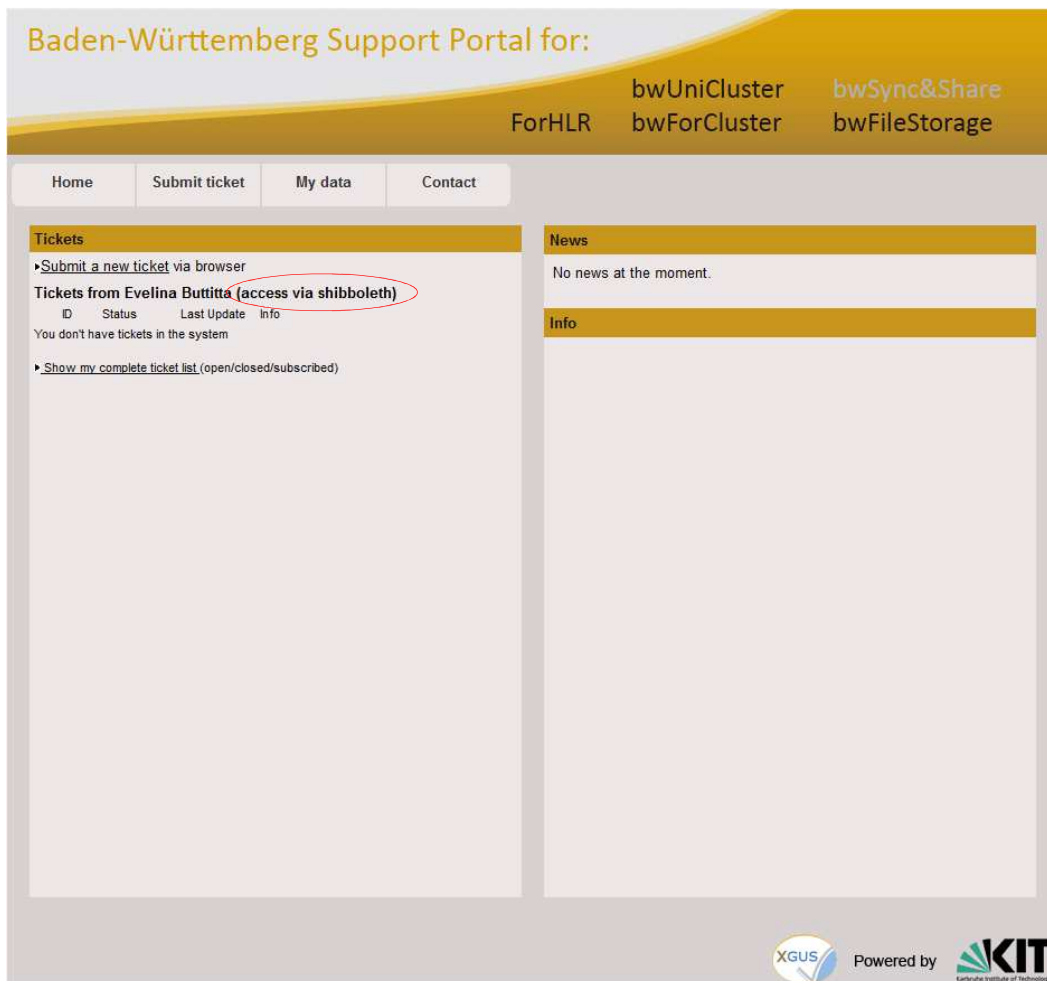

Fig. 4 – Shibboleth authentication – Resource returns content

2. Users without support right

3.1 Normal user privileges

If you access the portal for the first time or you didn't apply for the support right yet you are a normal user. Normal users are allowed to submit ticket and access/modify only own tickets. If you have the necessity to modify other tickets you should apply for support right during the registration process (see paragraph 3.5 Register/Apply for support staff).

3.2 Homepage

In the homepage there are two main sections separated in two different columns: **Tickets** and **News**.

The **Ticket** section shows your last five tickets that you have submitted.

In the **News** section you can see the news generated on the portal like events or maintenance announcements. Moreover there is an **Info** section with some links that might be of interest for you.

Fig. 5 – Homepage for normal user

Click on the link "Show my complete ticket list (open/closed/subscribed)" in the homepage to view all your tickets and sort them by status or other criteria (see Fig. 6). Here you can find also the list of tickets you have been subscribed.

Fig. 6 – All my tickets page

3.3 Ticket submit

The submit ticket form offers a set of fields which should help the user to describe her/his problem as detailed as possible. The submit form consists of two main sections: the user information and the problem information.

The **User Information** section includes the following fields:

- **Name**: Your name is displayed because you have accessed the portal via Shibboleth.
- **E-mail**: Your email address is displayed because you have accessed the portal via Shibboleth.
- **Notification on**: In this field you can decide if you want to be informed about every step (including assignment, changing of parameters etc.) or only on solution (including public diary entries) of the ticket.

The **Problem Information** section includes the following fields:

- **Subject:** In this area provide a concise short description of your problem.
- **Describe your problem**: In this area provide a more detailed description of your problem.
- **Priority**: Set a priority for your problem. Default priority is "less urgent".
- **Assign ticket directly to**: Specify which support unit is responsible for your ticket. You can also skip the 1st Level Support and directly assign the ticket to another responsible unit.
- **Upload attachment**: You can upload error log files, screenshots or similar to a maximum size of 2MB. Please, avoid uploading .html, .php, or .exe files.

Fig. 7 – Ticket submit page for normal user

3.4 View your own tickets

If you want to open a ticket page you can just click on the ticket id in the homepage. On this page you can see three main sections: the **Ticket Information** (Fig. 8), the **Ticket History** (Fig. 9) and the **Ticket Modify** (Fig. 10).

3.4.1 Ticket Information

The ticket information gives an overview about content and current status of the ticket including responsible unit and ticket parameters.

The description field shows the short and detailed description of the ticket, as specified by the user.

In this section you will find also the solution of the ticket when its status is set to "solved". The solution containing a short description of the origin of the problem and what has finally worked to solve it.

Fig. 8 - Ticket information – normal user

3.4.2 Ticket History

The ticket history shows all actions that have been taken to solve the ticket, with the date and time of these actions (see Fig. 9). Each status or responsible unit change produces a history entry with the new status and responsible unit in parenthesis

Fig. 9 – Ticket history – normal user

3.4.3 Ticket Modify

If you are a normal user, you can modify your ticket, for example add some additional information or comment on a question of a supporter.

You can change the following parameters:

- **Change priority**: Provides a dropdown-list of possible priority values.
- **Email notification:** Here you can decide if you want to be informed about every step (including assignment, changing of parameters etc.) or only on solution (including public diary entries) of the ticket.
- **Add a comment:** What you write here goes into the public diary of the ticket, it is visible for everyone.

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Fig. 10 – Ticket Modify – normal user

3.5 Register/Apply for support staff

If you would like to register to the portal and request the support right, click the link "Register" under the "My data" menu and fill in the registration form.

Set "Do you want to have support access" to "Yes", give a short explanation why you need this role (e.g "*I am [support unit] administrator*") and choose your corresponding support unit.

NOTE: each user can be assigned to more than one support unit even if during the registration process you can choose only one because of data privacy reasons. Please specify in the explanation field ("Why?") if your account should be connected to other support units and their names. Later the user administrator will check your request and assign the support units to your account.

After the registration process you will receive an email with a confirmation link. Click on it to confirm your email address and activate your account.

Fig. 11 – Registration and request of support right

In addition you will receive an email when the user administrator has confirmed your support request. Then you should only reload any page of the portal and see in the navigation menu new two sections: Search ticket and Support staff (see Fig. 12).
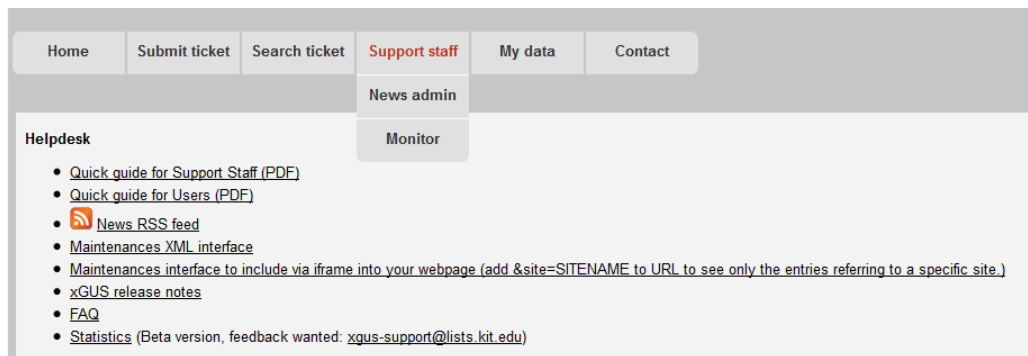

Fig. 12 – Navigation menu for supporter

4   User with support right (supporter)

4.1 Supporter privileges

Supporters can submit ticket, use the search ticket engine and access tickets which are:

- currently assigned to the same support unit which the user belong to (e.g. you belong to **bwsupportPortal First Level Support** support unit, then you can access and search only for tickets currently assigned to this support unit)

  or

- created by another user which belongs to the same user's support unit (e.g. you belong to bwsupportPortal First Level Support support unit. Then you can access a ticket created by another user which belong to **bwsupportPortal First Level Support** support unit independently of the fact that the ticket is currently assigned to this or another support unit).

If the user tries to access a ticket which doesn't respect these two conditions, s/he will get an empty page with the following message: "Sorry you cannot access this ticket because it doesn't belong to your Support Unit".

4.2 Homepage

In the homepage the **Ticket** section shows the last 5 personal tickets and a list of the last 15 open tickets.

In the **News** section you can see the news generated on the portal like events or maintenance announcements. Moreover there is an **Info** section with some links that might be of interest for you.

Fig. 13 – Homepage for supporter

4.3 Ticket submit

The tickets submit form offers a set of fields which should help the user to describe his problem as detailed as possible. The submit form consists of two main sections: the user information and the problem information.

The **User Information** section includes the following fields:

- **Name**: Your name is displayed because you have accessed the portal via Shibboleth.
- **E-mail**: Your email address is displayed because you have accessed the portal via Shibboleth
- **Notification on**: In this field you can decide if you want to be informed about every step (including assignment, changing of parameters etc.) or only on solution (including public diary entries) of the ticket.
- **My Support Unit:** Here you will see the support unit(s) you belong to. The ticket will be accessible to all users belonging to the selected support unit (e.g., your colleagues) according to the support right (see 4.1 Supporter privileges).
  Choose "private" if you like to keep this ticket accessible only to yourself.

The **Problem Information** section includes the following fields:

- **Subject:** In this area provide a concise short description of your problem.
- **Describe your problem**: In this area provide a more detailed description of your problem.
- **Priority**: Set a priority for your problem. Default priority is "less urgent".
- **Assign ticket to**: Specify which support unit is responsible for your ticket. You can also skip 1st Level Support and directly assign the ticket to another responsible unit.
- **Upload attachment**: You can upload error log files, screenshots or similar to a maximum size of 2MB. Please, avoid uploading .html, .php, or .exe files.

Fig. 14 – Ticket submit page for supporter

4.4 Ticket search

Tickets can be searched by various criteria according to the ticket parameters like "Support Unit", "Status" etc. You can also search for keywords in the description text or just enter the ticket id of a wanted ticket.
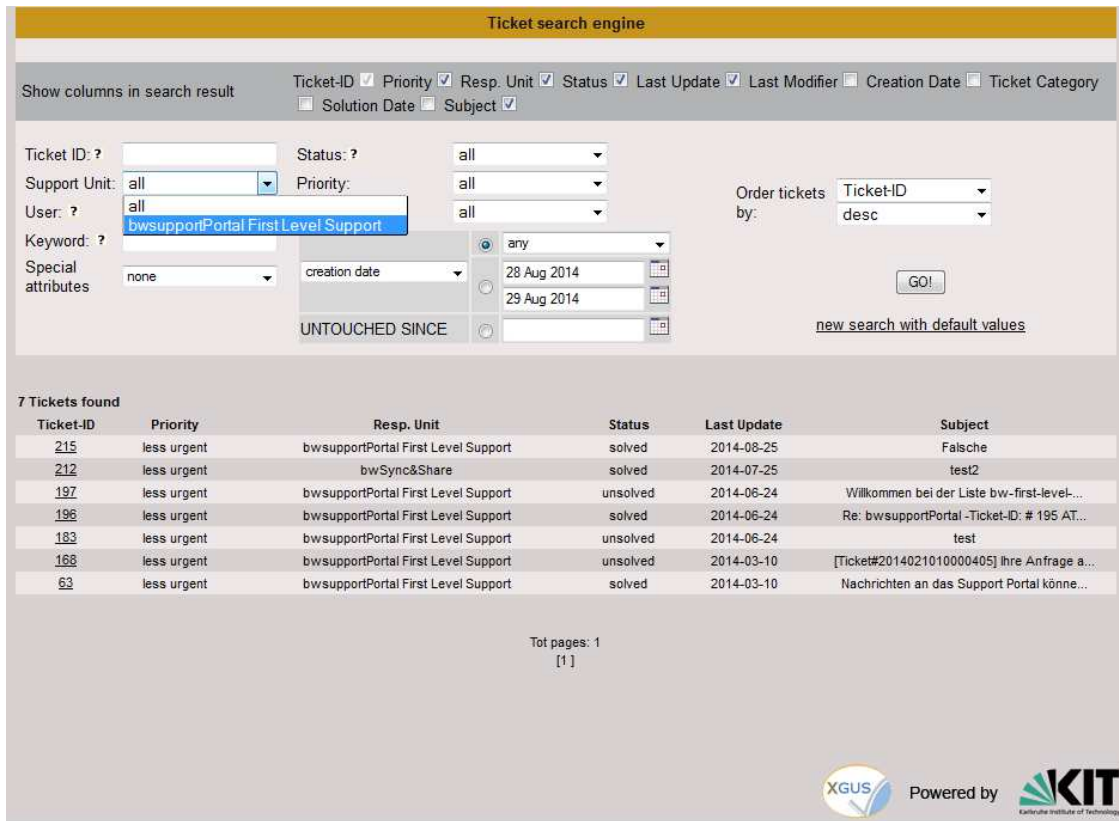
You can restrict your search also by setting a timeframe, choosing from the values "last day", "last week", "last month", "last quarter" or choose a specific timeframe by setting the exact dates.

You can define which columns you want to see in the search result list choosing one or more fields in "Show columns in search result".

In the "Order tickets by" section you can define by which parameter the result list should be sorted.

After setting the search ticket parameters you can confirm clicking on the "GO" button and a list of results will be displayed on the bottom of the page.

This list shows the tickets which match with your search criteria including links to the ticket, the responsible unit, the status, the last update and the short description.

Fig. 15 – Ticket search page

4.5 View tickets

4.5.1   Ticket Information

The ticket information gives an overview about content and current status of the ticket including responsible unit and ticket parameters.

If you are interested in the current ticket and you would like to add it to your dashboard page, you can click on "Add to my dashboard" link on the left corner of this section.

The description shows the short and detailed description of the ticket, as specified by the user.

In this section you will find also the solution of the ticket when its status is set to "solved". The solution containing a short description of the origin of the problem and what has finally worked to solve it.

If the ticket cannot be solved by only one support unit, it can be duplicated up to 15 times. You have to enter a comment why you duplicate this ticket. The duplicated tickets contain the same ticket information but the ticket history is not duplicated.

Tickets which are already duplicated or are in a terminal status (solved, unsolved, or verified) cannot be duplicated.

Fig. 16 – Ticket information – for supporter

Note: in this section you will find the "Submitter SU" which corresponds to the user submitters' support unit. If you belong to the same support unit you will have access to the ticket according to the supporter privileges (see paragraph 4.1Supporter privileges)

4.5.2 Ticket History

Fig. 17 - Ticket history – for supporter

Each history entry shows the name of the Last Modifier, the date and time of the change and what has been done with the ticket.

Update about status or responsible unit produces a history entry with the new status and responsible unit in parenthesis.

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4.5.3 Ticket Modify

Fig. 18 – Modify section - for supporter

- **Assign ticket to support unit:** If a ticket has to be assigned to another support unit, the appropriate unit has to be selected here.
- **Change status:** You can select between several open and terminal status.
  a. Tickets which have not yet been assigned to a support unit have status **new**. 1st Level Support is responsible to assign these tickets to the responsible support unit.
  b. If you start working on a ticket, select **in progress**, so the submitter can see that somebody works on the ticket.
  c. Select **waiting for reply** if you have posed a question to the user or other support staff and are waiting for an answer.
  d. Select **on hold** if you know the ticket cannot be solved for more than three days because you are waiting for a software update, a political decision etc.
  e. Select **solved** if the problem is solved and enter a solution in the solution field
  f. Select **unsolved** if the problem cannot be solved. Enter an explanation in the solution field.

g. Select **reopened** if the ticket is on solved or unsolved and you find out that the solution/explanation is not satisfactory or the problem has reappeared.

h. In **verified** tickets the submitter has verified the given solution, the ticket cannot be modified anymore.

i. Changing of the support unit automatically sets the status to **assigned**.

- **Change Priority**: Provides a dropdown-list of possible priority values.

- **Public diary:** What you write here is visible for everybody. Choose this field if you want to communicate with the submitter.

- **Solution:** If you click this link, the solution field will open. Check next page for further information. Insert the solution of the problem. Formulate it in a way that it would help you or your colleagues if the problem reappeared in a few months.

- **Escalation/reminders**

  a) "Escalation/reminders as usual" means that you support unit receives an email with a list of all open tickets for your support unit twice a week.

  b) If you set the ticket to "waiting for reply" or "on hold" and select "Please send reminder on …" you won't be reminded about this ticket until the given date. You might use this feature if you are waiting for an external software update etc.

- **Related Issue**: If you want to document a link which is related to this issue, e.g. a ticket in a different ticket system/bug tracker, insert the link here.

- **Attachment**: You can upload error log files, screenshots or similar here to a maximum size of 2MB. Avoid uploading .html, .php, or .exe files.

- **Subscription**: If you want to stay informed about this ticket via email notification even if you are not in the responsible support unit, set the flag here and choose if you want to be notified on solution or on every change.

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4.5.4 Verify a Solution/Reopen Ticket

If you are the submitter, you can verify the solution of a ticket. This means you are content with the given solution. Please note that the ticket cannot be changed any more after verification.

Fig. 19 – Ticket Verify

If you are not happy with the given solution, you can reopen the ticket clicking on the 'reopen' link. You will be guided to the modify section where you should change the status of the ticket from solved to "reopened". Then insert an explanation why you are not satisfied with the given solution in the comment field and submit the ticket.

4.6 My dashboard

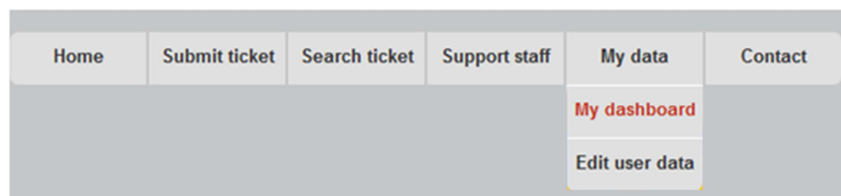You can access the ticket dashboard page clicking on "My dashboard" on the "My data" menu (see Fig. 20).

Fig. 20 - My dashboard link on the main menu

Your personal dashboard contains a list of tickets that you have chosen to add to your dashboard. You can do so if you click "Add to my dashboard" on top of the ticket page (see Fig. 20).

Fig. 21 – Ticket page – "Add to my dashboard" link

For each ticket listed in this table (see Fig. 22) you can find a link guiding you directly to the ticket and some information: creation date of the ticket, short description, status, info about the author and the date of the last update

You can remove a ticket from your dashboard whenever you like clicking on the icon in the "Remove ticket from dashboard" column.

Fig. 22 – My dashboard page

4.7 Edit user data

You can check/edit your account information clicking on "Edit user data" of "My data" menu (see Fig. 23).

Fig. 23 – View/edit user data page
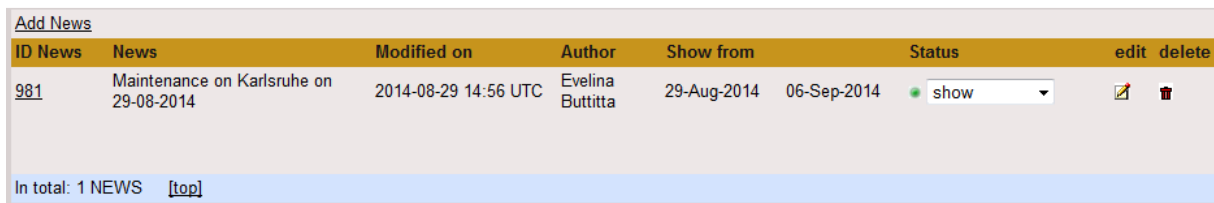
4.8 News administration

If you want to inform users about maintenance at your site, a conference or event, you can create a news entry which will appear on the main page.

As supporter, you can access the news administration section even if a small limit: you can add, edit or delete only your news. Only the news administrator can manage all news from all users. If you want to get this right please contact the xGUS team.

In this section a list of news of the last 2 months is showed with the headline, date of modification, timeframe and the status.

You can decide to change the status of the news between: hide, show, show as a warning or show as a hint.
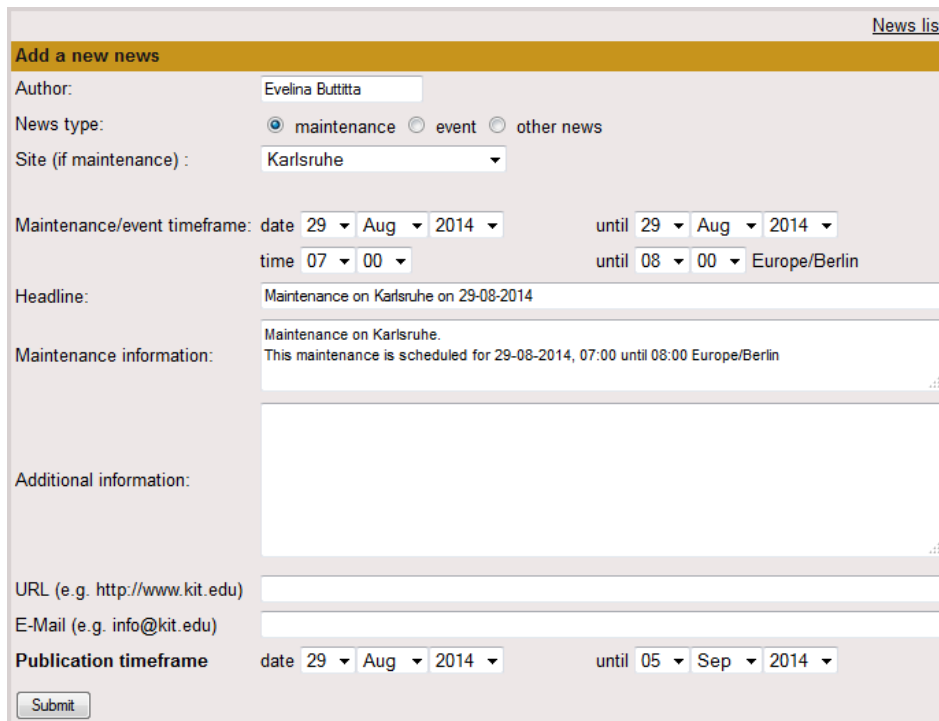
Fig. 24 – News administration page

If you want to add a new news click on "Add News" link in the left top corner of the page. You will see the form showed in Fig. 25.

Fig. 25 – Add news

In this section you can add new news which will be displayed on the main page and on the news interfaces (links on page "Support Staff") during the timeframe chosen. Afterwards it will disappear automatically.

Select the type of news: maintenance announcement, an event or else. If you selected maintenance, you can choose a site for which you want to create a maintenance announcement.

Select the timeframe of the maintenance or the event. In case of maintenance, an information message is automatically generated from the data you provided.

You can add some more detailed information in the "Additional Information" field and provide an URL or email address for more information.

Click the "Send" button to create the news. The news will be added in the "News" section of the homepage (see Fig. 26).
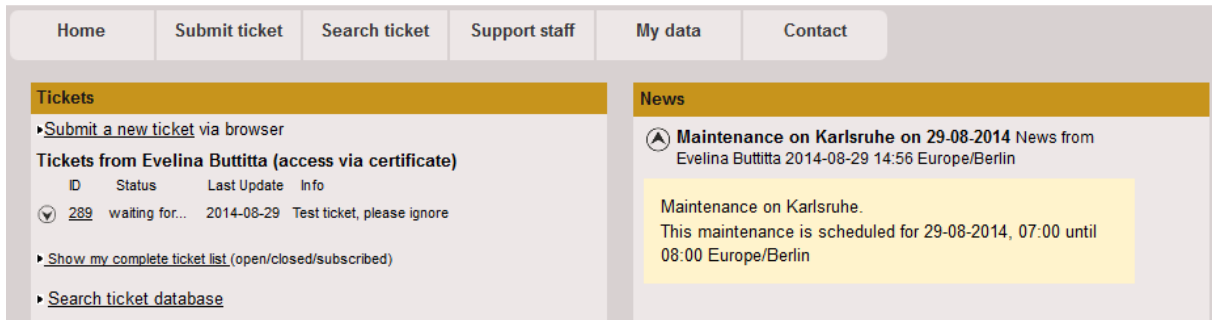
Fig. 26 - News in the homepage

4.9 Monitor

As support member you can see in the monitor page all ticket changes in the portal from the last 24 hours (see Fig. 27)
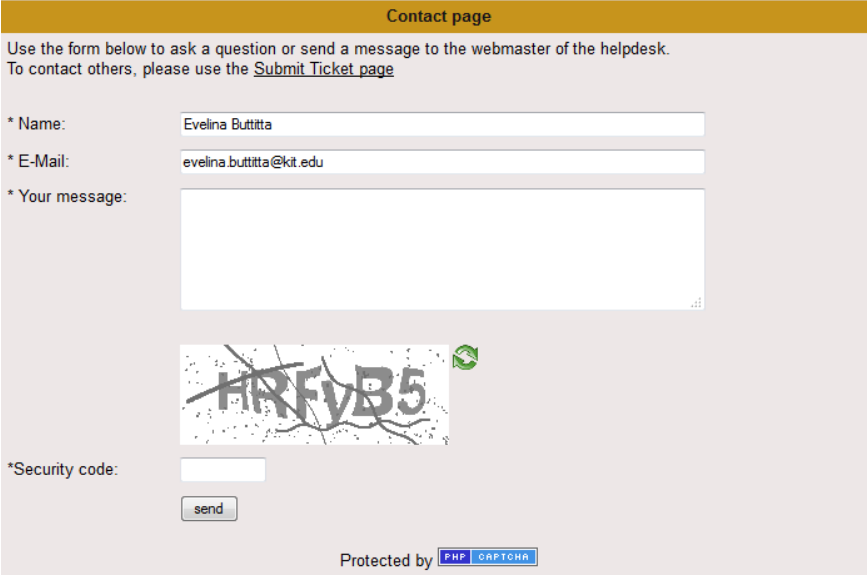

Fig. 27 – Monitor page

5   Contacting xGUS team

If you have problems with the registration/authentication or if you encounter any issues using the Baden Württemberg Support Portal you can contact the xGUS development team.

Click on "Contact webmaster" link of the "Contact" menu and fill in the form (see Fig. 28) to send an email to the xGUS team with your message. Alternatively you can send directly an email to xgus-support@lists.kit.edu.

Fig. 28 -"Contact" form for sending an email to the xGUS team