



The SyAM Helpdesk Public Form allows you to create a customized form to enable parents, students, or staff to electronically submit their questions/issues and automatically generate a ticket from the form submission. The form is presented on the internet and accessible without any required authentication.

Setting up the Options

1. SyAM can auto assign tickets based on the Asset Classification that is mapped to the event type. So, we first create and Asset that will act as a placeholder for the Parent Reported Issue asset classification. Create the new Asset Classification Parent Reported Issue.

Add Asset Data Entry

Add Classification Value

Parent Reported Issue

Apply Cancel

Add/Edit Asset

Asset Details

General Information Financial Information Service Information Insurance

Site: SyAM Test Server 73 Image: Remove Choose File No file chosen

Asset Number: [] Asset Name: Parent Reported Issue

Description: [] Inventory Number: []

Date Installed: [] Serial Number: []

Last Inventoried / Audited: [] Bar Code: []

Retired Date: [] Asset Notes: []

Primary MAC Address: []

IP Address: []

Manufacturer: None Add Remove Machine Model: None Add Remove

Department: None Add Remove Classification: Parent Reported Issue Add Remove

Owner: None Add Remove Location: None Add Remove

Function: None Add Remove Room Number: None Add Remove

Status: Placeholder Add Remove Geolocation: []

Device URL: http:// [] Launch Console

Apply Close Remove Asset



2. Create an event type that will be used for Parent Reported Issue Form and mapped to the Parent Reported Issue asset classification.

Event Type	Event Area	Event Definition
Parent Reported Issu	Create New...	Create New...
Parent Reported Issue		

3. Map the Parent Reported Issue to the Parent Reported Issue asset classification.

Events | Classifications

Parent Reported Issue

Available Classifications

- Chromebook
- Computer - Desktop
- Computer - Laptop

Move Right

Move Left

Assigned Classifications

- Parent Reported Issue



Quick Reference Parent Support Form

- Update the Users/Groups Asset Classification Access, select the Parent Reported Issue asset classification to the appropriate technicians, map specific locations and enable auto ticketing. (This example is just showing the single asset classification selected, your environment may have other assets classifications mapped to the technicians)

Choose site: SyAM Test Server 73 Choose Group: Techs

Save Reset

Site Manager Asset Classification Access

Classifications	Jrtech1	Jrtech2	Jrtech3
Chromebook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Computer - Desktop	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Computer - Laptop	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Computer - Notebook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Computer - Server	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Computer - Tablet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
iPad	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parent Reported Issue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Photocopier	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Printer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Projector	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Software	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Telephone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Site Manager Location Access

Locations	Jrtech1	Jrtech2	Jrtech3
Ungrouped	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Central Office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Elementary School	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
High School	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Middle School	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Auto Ticketing Rules

	Jrtech1	Jrtech2	Jrtech3
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



Create the Form (Checklist)

1. Open Administration – Self Service – checklist – click create
2. Give the Checklist a name, now select the Parent Reported Issue event type
3. Select the fields from the right-hand menu and drag them on to the form.
4. Re arrange by dragging the field up or down to the desired position
5. Edit a field by clicking on the pencil icon shown when mousing over the field
6. Press Save once complete

**Please Note – the form must contain SyAM Ticket Fields email and location

Adding an Image

1. Rename the png or jpg image as logo and copy the file to c:\sitemanager\sitemanagerservice\ folder
2. Add the image field to the form
3. Edit the image and under Src type in the name of the file
4. By default, the logo will left align, to center change the Class to center-block

The image shows a configuration dialog box for an image field. It has a 'Required' checkbox which is unchecked. Below it are several input fields: 'Name' with the value 'image-1601646572886', 'Src' with the value 'logo.jpg', 'Alt' with the value '150', 'Width' with the value '200', 'Height' (empty), 'Title' (empty), and 'Class' with the value 'center-block'. A 'Close' button is located at the bottom right of the dialog.



Adding a Text Field

1. Add the text field to the form
2. Edit the text field
3. To force the user to provide an answer check off Required
4. Enter the text that you wish to show on the form in the label box
5. Help text is presented on screen when they mouse over the '?' next to the label
6. Placeholder text is shown in the box so they know what information should be typed in that box

Student Full Name *

Required

Label

Help Text

Placeholder

Class

Name

Access Limit access to one or more of the following roles:

Value

Type ▾

Max Length



Adding a Radio Group Field

1. Add the Radio Group to the form
2. Edit the Radio Group
3. To force the user to provide an answer check off Required
4. Enter the text that you wish to show as the title of the radio group on the form in the label box
5. Help text is presented on screen when they mouse over the '?' next to the label
6. If you wish to allow the user to type in their own Value check of Enable other
7. Enter the options you wish to present, type in the same value for the Option and Value.
8. Press Add Option button to add more options to your list. You must have a minimum of two options

The screenshot shows a configuration form for a radio group field. The form includes the following fields and options:

- Required:**
- Label:**
- Help Text:**
- Inline:** Display radio inline
- Class:**
- Name:**
- Access:** Limit access to one or more of the following roles:
- Enable "Other":** Let users to enter an unlisted option
- Options:** A list of options with radio buttons. The first option is "Email" with a value of "Email". The second option is "Phone" with a value of "Phone". There is a red 'x' icon next to the second option.
- Buttons:** "Add Option +" and "Close"



SyAM Ticket Fields

These are added when you drag the ticket field to the left, the fields can be edited for title, placeholder and help text but the name must be kept to the syam name or it will not be able to map the field to the helpdesk ticket.

Mapped Fields

When using these Checklist item names the data entered is mapped to the associated field value used in the Helpdesk, this improves the efficiency for assignment of the ticket along with the communication back to the parent.

Name of Checklist Item	Ticketing Field	Notes
syamlocation	Customer Location	*Required If you do not wish to present the option, use the hidden input and use the value ungrouped
syamcustomeremail	Customer Email Address	*Required – this must be present in the form or it will not function
syamcustomerphone	Customer Telephone	*Required if you wish to populate the telephone number in the ticket
syamcustomername	Customer Name	*Required if you wish to populate the name in the ticket instead of the email address. This can be from a single field such as full name or a combination of two fields first name, and last name
syamserialnumber	Serial Number	*Required if you wish to link a ticket to a specific asset by serial number
syamassetnumber	Asset Number	*Required if you wish to link a ticket to a specific asset by asset number



Enable the Public Form

1. Open Administration – Self Service – Public Form – click create
2. Select the form (Name you gave the checklist)
3. Select your school district
4. Select the Parent Reported Issue event type
5. Type in the text you wish to display to the end user after they press submit.
6. Press Save

The screen will present the forms created along with their URL link.

You can edit your settings by clicking Edit or remove the form by pressing Delete

****Please Note**

When adding the form to your web site change the IP address to the A record name so it can be accessible from outside of the school network

Examples

This would not work outside of the local network as it uses a local IP address in the URL

http://192.168.200.71/SiteManagerService/_parentform.html?id=1&cid=1&eid=1022&sid=0101ed42-bcff-c0a8-c847-00155dc8a002

This will work from anywhere as we are using the A Record name that routes back to the server
https://helpdesk.syamsoftware.com/SiteManagerService/_parentform.html?id=1&cid=1&eid=1022&sid=0101ed42-bcff-c0a8-c847-00155dc8a002



Quick Reference Parent Support Form

Example showing how data is mapped from the form to the ticket details.



Parent Support Page

Your Email Address*
nickthickins@gmail.com

Ticket #29 - New Activity History

Your Full Name*
Nick Thickins

Your Phone Number (Optional)
6039210232

Student Full Name* ?
Victoria Thickins

School Student Attends*
 High School
 Middle School
 South School
 North School

Describe the problem you need help with
Requires a new iPad for extra work

Site / Location
Site Name: School District
Location: High School
Room Number:

Customer Information
Name: Nick Thickins Search
Phone Number: 6039210232
Windows Login:
Email: nickthickins@gmail.com
 Notify Customer Email

Status
New

Estimated Completion Date
2020-Nov-03 08:44:00

Event
Parent Helpdesk

Summary
Student Full Name*?: Victoria Thickins
Describe the problem you need help with : Requires a new iPad for extra work
Best Way To Contact* : Email
Asset Number :
Serial Number :



Communication with the parents

Once the form is submitted a ticket notification email is sent to the parent.

Any public comments entered the ticket by the technician will also be emailed to the parent.

By enabling Email to Ticket the parent can reply to these ticket notifications and their email contents will be updated as public comments into the ticket.