FPS GOLD Help Desk User Guide

Created November 2025

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FPS GOLD Help Desk User Guide

The FPS GOLD Client Services Help Desk is a Web-based system developed by FPS GOLD to process, manage, and track customer issues from submission to resolution.

This document contains instructions for FPS GOLD clients on how to use the Help Desk system.

Getting Started

Before you can begin using Help Desk, you need to set up security, sign on, and create a user record.

Network Setup

Help Desk is accessed through a Web browser. The website will be given to you at the time FPS GOLD brings you onto the system.

Firewall changes will also need to be made so that your institution can access this system:

- IP Address 172.27.29.62 Port 443
- IP Address 172.27.27.114 Port 443

Setting Up Security

Before you can use Help Desk, each user must be assigned a security system profile by your institution's security administrator. Users can be assigned to any of the following three system profiles found in CIM GOLD > Security > Setup:

9500	TicketUserSecurityGroup	FPS GOLD Ticket System...	☑	
9501	TicketUpdaterSecurityGroup	FPS GOLD Ticket System...	☑	
9502	TicketAdminSecurityGroup	FPS GOLD Ticket System...	☑	

- **TicketUserSecurityGroup:** All users must be assigned to this group before they can log onto the system. All users can see tickets, receive assignments, attach files to a ticket, and complete assignments.
- **TicketUpdaterSecurityGroup:** In addition to the permissions all users have, anyone in this group can also create a ticket, change the bank owner of a ticket, and attach files. Anyone in this group can also close any ticket they own.
- **TicketAdminSecurityGroup:** In addition to the permissions in the two groups above, anyone in this group can close any ticket. An Administrator can also assign users to be afterhours contacts and liaisons.

Opening Help Desk

You can open Help Desk two ways:

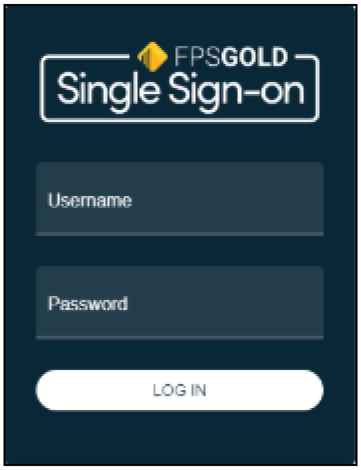
- Directly from a Web browser by entering the URL for your institution.
- From within CIM GOLD: Other Applications > Browser Applications > Help Desk.

Before you can access the Help Desk from CIM GOLD, two conditions must be met:

1. Your institution must subscribe to the mini-application: Browser Applications. This is found in CIM GOLD under Security > Subscribe to Mini-Applications > Other Applications.
2. You must have security to access the Browser Applications (CIM GOLD Security > Setup > CIM GOLD > Other Applications > Browser Applications.

Signing Onto Help Desk

After you have security access to the TicketUserSecurityGroup, you can sign onto the Help Desk by entering your FPS GOLD credentials in the dialog box shown below.



Tip: Do not save the sign-on screen as a bookmark to your Favorites in your browser screen.

Creating Your User Record

The first time you log onto Help Desk, the User Record Not Found dialog box will open with your email address, employee number, and institution in the appropriate fields (see the example below). You can then add other information to your user record in this dialog box to complete your record. When you have created your user record, you can perform all the tasks your user group allows you to perform.

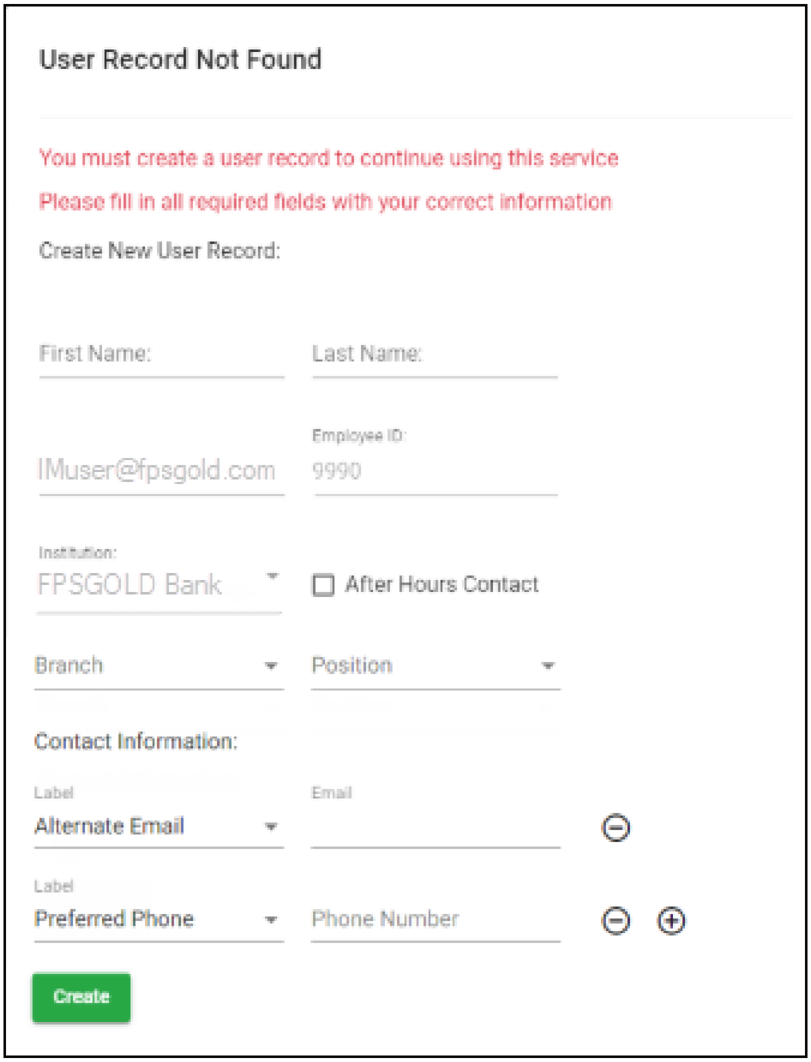
To create your user record:

1. Enter your **First Name** and **Last Name**. This is required.
2. Your email address, if on the CIM GOLD security record, will default from CIM GOLD; otherwise, this information is needed for communications from the Help Desk system.
3. Your employee ID will default from the CIM GOLD security and cannot be modified by the customer.
4. Your institution name will default based on the URL accessed.
5. The After Hours contact check box should be marked by the institution Help Desk administrator.
6. If the administrator has set up branch names, select your branch location.
7. If the administrator has set up bank positions, select your position.
8. Contact Information can be used to enter the following: preferred phone, afterhours phone, work phone, cell phone, alternate email, and a note.

This information is used by FPS GOLD to contact the customer contact of a ticket, specifically when a ticket is given a priority of One, Severe Impact, or two, Critical Impact.

9. When you have finished entering information, click <Create>.

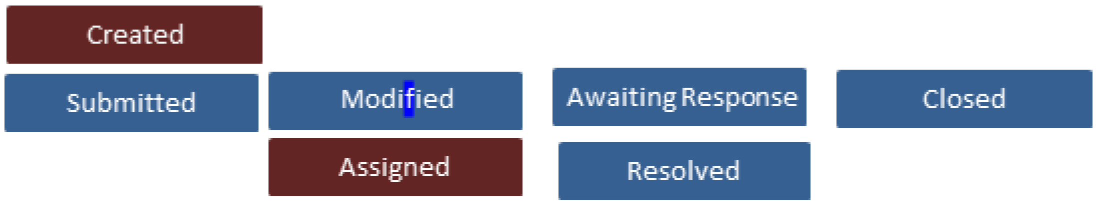
Tip: You can search in any drop-down list. To search, type the first letter of the item.



At any time after creating your user record, you can make changes to it. See [Editing a Profile](#) below.

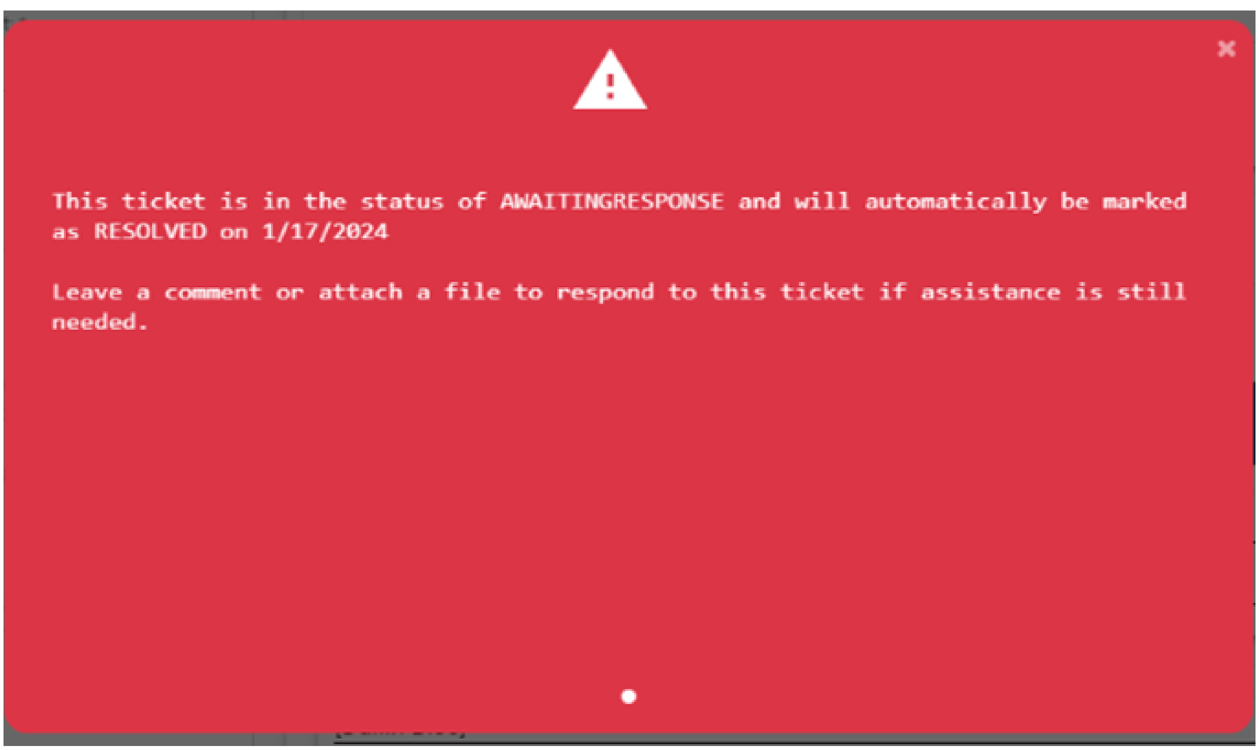
Life Cycle of a Ticket

A ticket goes through several stages in the process of being completed. Help Desk includes four identifiable system statuses—Submitted, Modified, Awaiting Response/Resolved, and Closed—but there is more to the cycle than the system indicates. Intermixed within the three statuses are additional undocumented statuses that truly define the ticket life cycle.

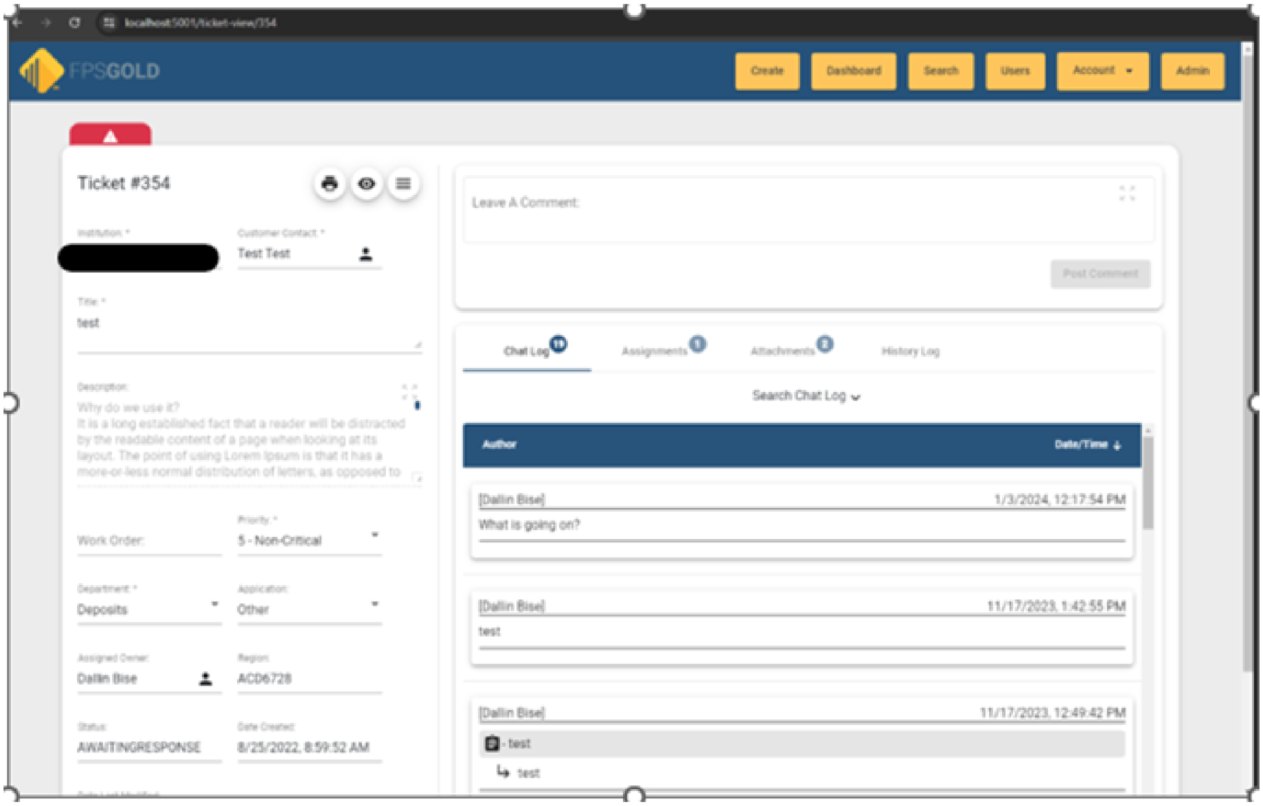


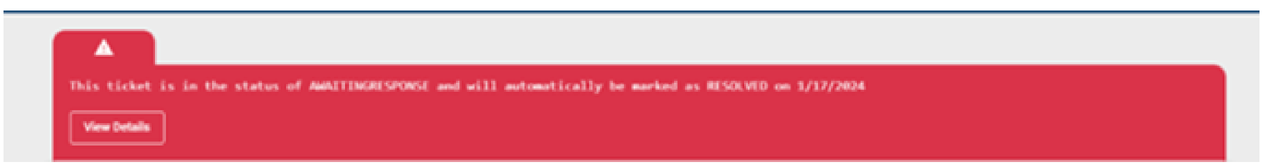
1. **Submitted Status.** The bank (Customer Contact) creates and submits a ticket via Help Desk with a request. This ticket has not been claimed by a Client Services Consultant at FPS GOLD when the ticket is in a "Submitted" status.
2. **Modified Status.** A Client Services Consultant claims the ticket and actively works on the ticket to provide a solution to your request.
3. **Awaiting Response.** A ticket may be placed in “Awaiting Response” while the Client Services Consultant is waiting for additional information from the bank Customer Contact.

   A note will appear in the chat log indicating that FPS GOLD is waiting for additional information. When a Bank Customer Contact navigates to a ticket that is awaiting a response, a red pop-up will appear on the ticket notifying you the ticket is awaiting response. The Customer Contact can close the message by clicking the “X.”



A red tab will also appear at the top of the ticket and will show a similar “Awaiting Response” message.





A ticket in “Awaiting Response” status will remain in the status for 10 days and will then be updated to a “Resolved” status.

4. **Resolved.** A ticket may be placed in “Resolved” status when a solution has been provided by the FPS GOLD Client Services Consultant to the bank Customer Contact for review and approval.

   A note will appear in the chat log stating the resolution and asking for the bank employee to close the ticket if they are satisfied with the solution.

   When a bank Customer Contact navigates to a resolved ticket, a red pop-up will appear on the ticket notifying the Customer Contact that the ticket is resolved. The customer contact can close the message by clicking the “X.” A red tab will also appear at the top of the ticket and will show a similar informational message.

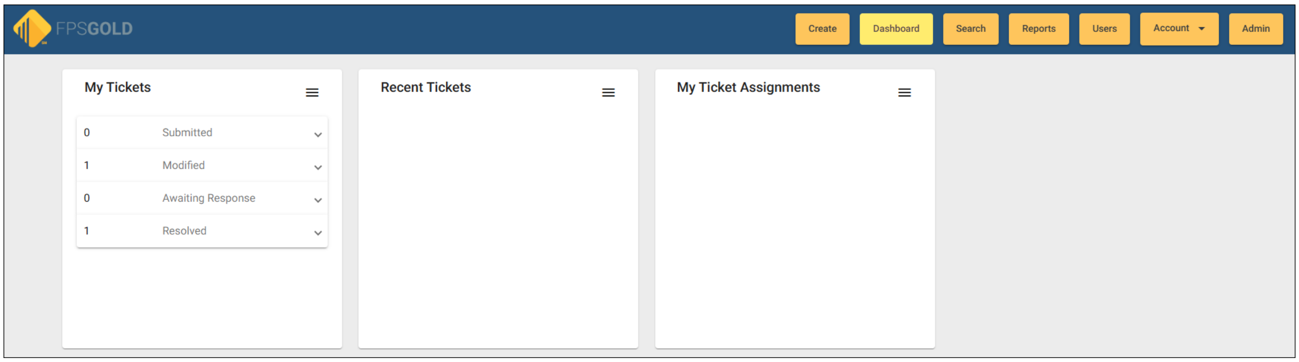
A red tab will also appear at the top of the ticket and will show a similar "Awaiting Response" message (see previous page).

Once a ticket has been placed in "Resolved" status, it will remain in this status for seven days, and the ticket will then be closed automatically.

5. **Closed Status**. The issue has been resolved satisfactorily for the customer. Both FPS GOLD Client Service Consultants and Customer Contacts can close tickets. A closed ticket cannot be reopened.

Using the Dashboard

When you have completed your user record, you can view the Dashboard. The example below shows the home page with the Dashboard open. The fields are explained below the example.



Home Page with Dashboard

- Dashboard cards will refresh automatically every five minutes.
- Dashboard cards will have an icon indicating the ticket is Awaiting Response (A), Closed (C), or Resolved (R).
- Recent Tickets are the tickets for the entire institution.
- Dashboard cards have drop-down icons that can be expanded to view additional information about a ticket.
- Dashboard tabs (Create, Dashboard, Search, Users, Account, Admin) give you access to additional screens in Help Desk

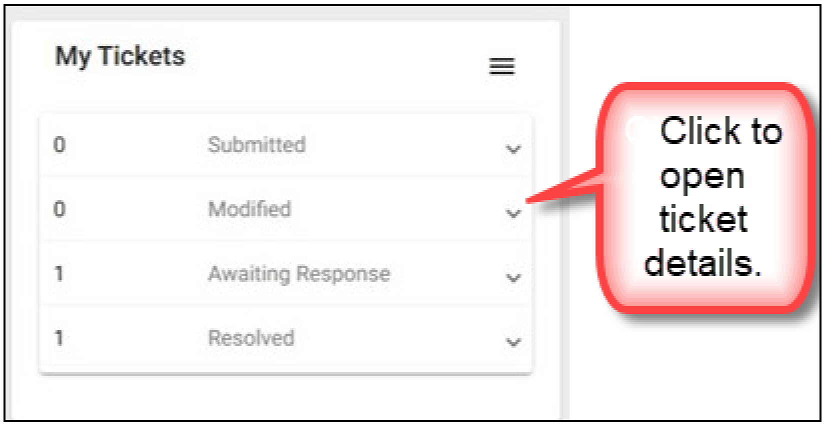
My Tickets

You are the assigned Customer Contact for all tickets in the My Tickets Dashboard card.

The fields in the My Tickets group contain links to all Submitted, Modified, Awaiting Response, Resolved, and Closed tickets you own.

To view links in a My Tickets category:

1. Click on Submitted, Modified, Awaiting Response, Resolved, or Closed to view tickets in each category. See the example below.



Links to Tickets

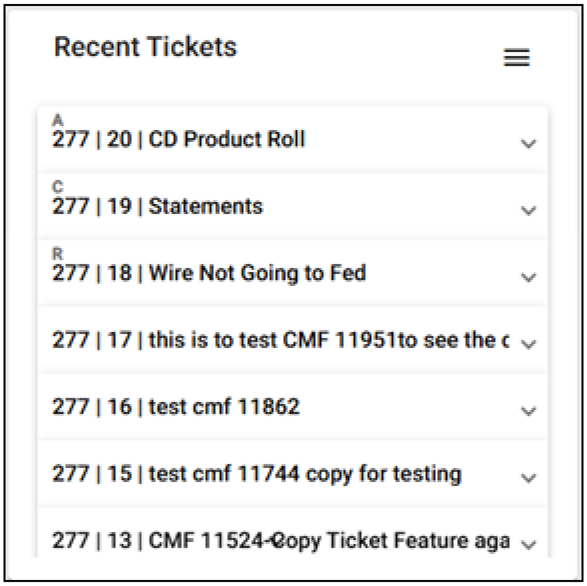
To read the details pertaining to that ticket, click on the icon ﹀ beside the title or on the white space above or below the ticket. See details pertaining to the ticket in the example below. To improve the load time of the dashboard screen, My Tickets no longer contains closed tickets.

Viewing a Ticket

Tickets can be viewed in any category on your My Tickets dashboard card. Each ticket includes a hyperlink on the title of the ticket. When you click on the title of the ticket, it opens the full view of your ticket. Tickets can be viewed from any Dashboard card on the main menu.

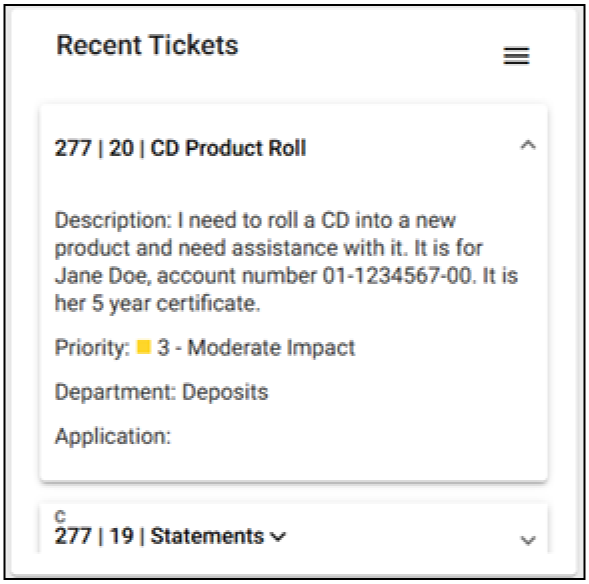
Recent Tickets

The list of Recent Tickets group contains links to all currently submitted and modified tickets at your bank, including Awaiting Response, Resolved, and Closed tickets. The Recent Tickets group shows all tickets for all of time except closed tickets. Closed tickets only show on the Recent Tickets group for that day.



To view details of a recent ticket:

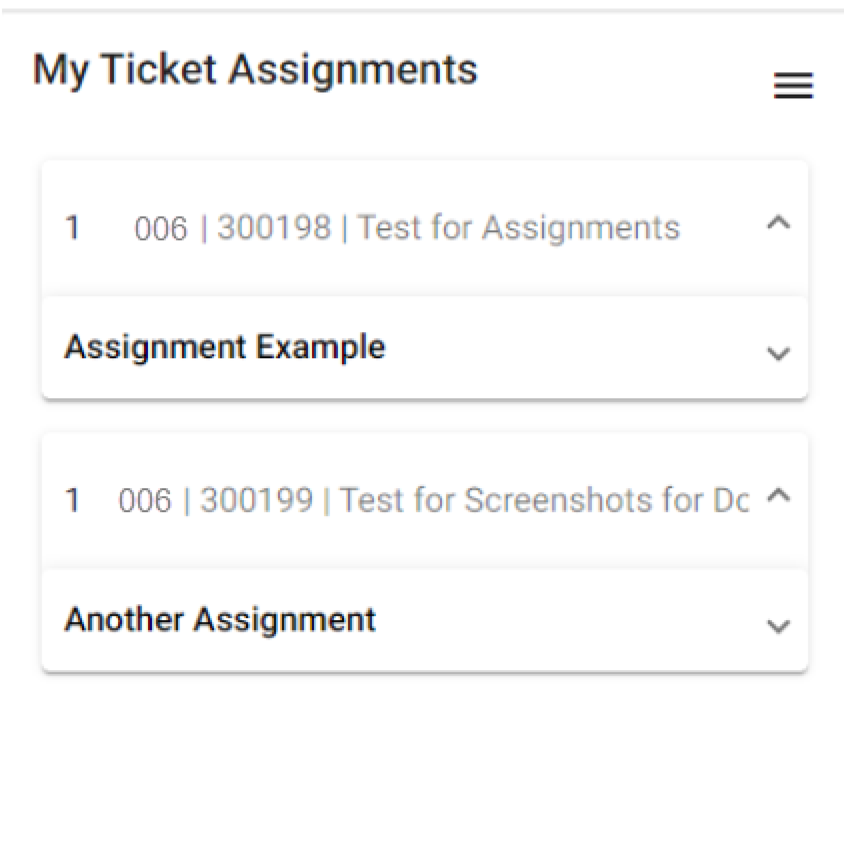
1. Click on the title of the ticket in the Recent Tickets list to open the ticket. See the example below.



Details of Ticket #20

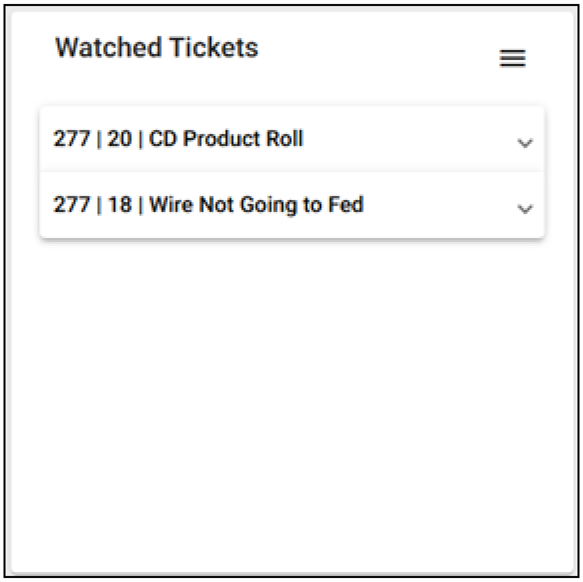
My Ticket Assignments

This list shows any assignment you have been given on any ticket. See the example below.



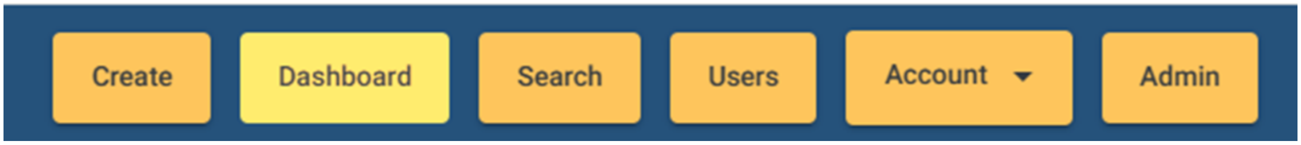
Watched Tickets

Watched Tickets show any ticket you have chosen or have been assigned to follow for updates. As a ticket watcher, you receive email updates when a ticket has new information for you to view. As a ticket watcher, you also have the option to add comments and attachments or simply view the updated information on the ticket.



Dashboard Tabs

The Dashboard has six tabs:

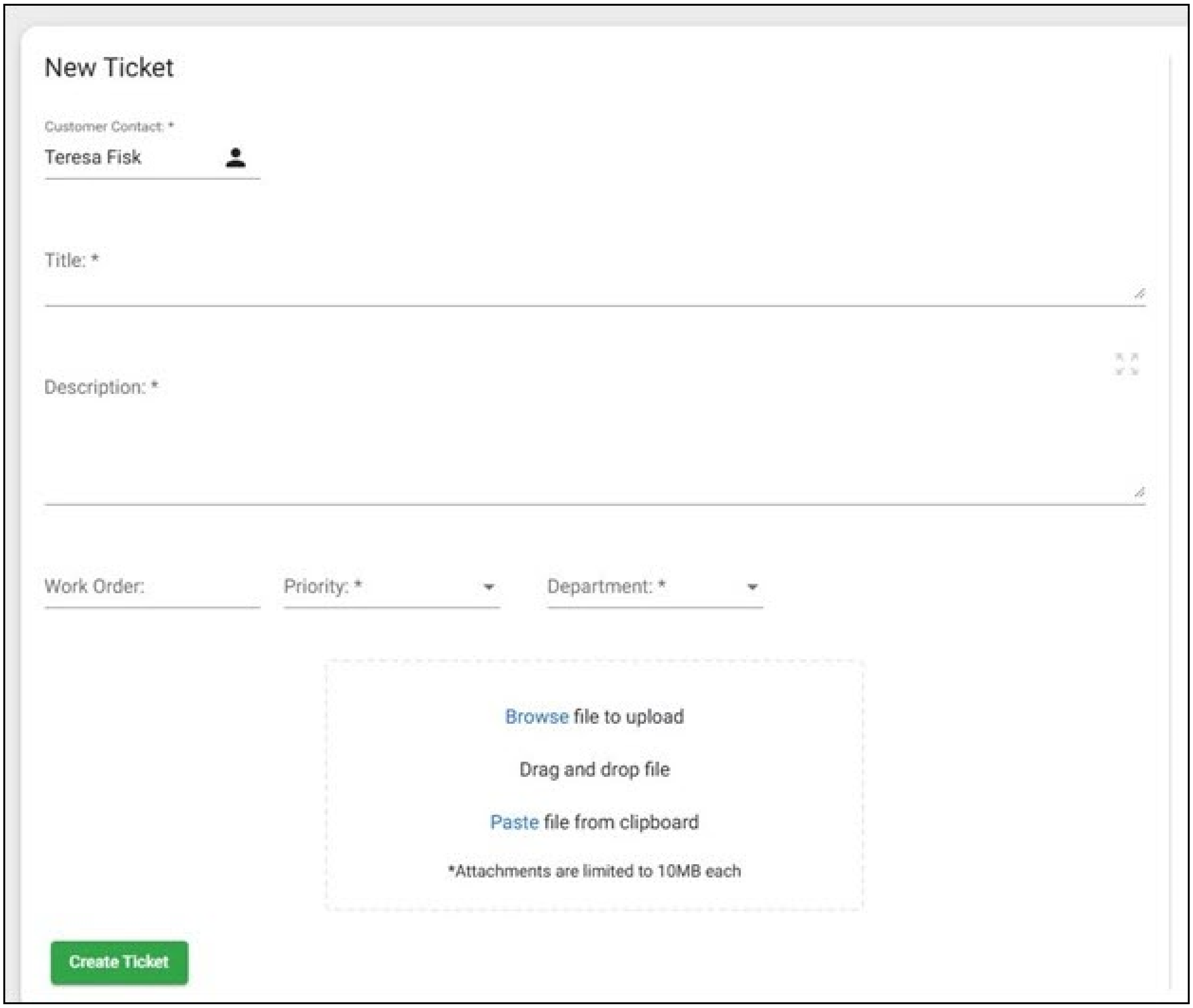


Create Tab

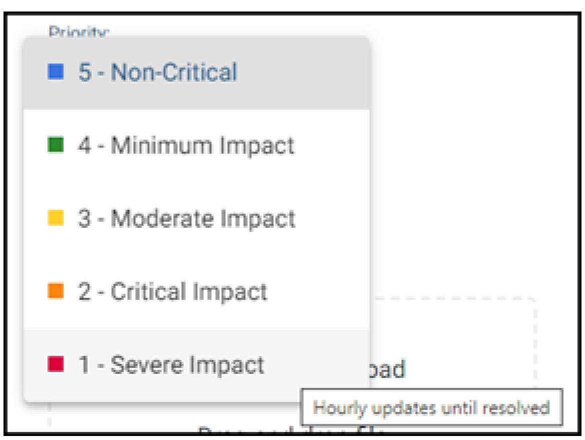
Use the Create tab to create tickets. Only users with TicketUpdater or TicketAdmin security can create tickets. The system will spell check for you. No grammar checking is provided.

To create a ticket:

1. Click <Create> at the top of the screen to open the New Ticket dialog box.
2. Type a title for the new ticket. Please avoid using Personal Identifiable Information (PII) in the title of your ticket, such as full card numbers, SSN, or full account numbers.
3. Type a description for the ticket. Help Desk is a secure site, and PII can be added to the description. For example, you can add full names and complete account numbers to your description. However, due to PCI compliance guidelines, only include the last four digits of card numbers.



4. Choose a priority level from the drop-down list shown below. You can hover your mouse pointer over any item in the list to see a tooltip with a brief definition of that item.

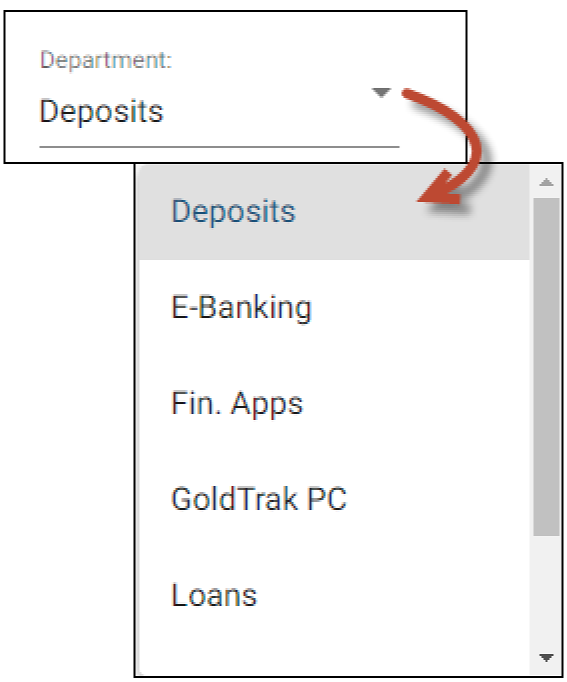


Priority Drop-down List

The table below gives a brief explanation of the priority levels. For more information about priority levels, please see "How Severe is My Issue?" in the *Client Support Reference Guide* on the FPS GOLD website (https://www.fpsgold.com/contact-us, then click <View Client Support Guide>).

Priority Level	Explanation
5—Non-Critical	This is the lowest priority. You will receive weekly updates until the ticket is resolved.
4—Minimum Impact	If you select this priority level, you will receive updates every three days until the ticket is resolved.
3—Moderate Impact	If you select this priority level, you will receive updates daily until the ticket is resolved.
2—Critical Impact	If you select this priority level, you will receive updates every four hours until the ticket is resolved.
1—Severe Impact	If you select this priority level, no one assigned to this ticket at your institution or FPS GOLD will go home until the issue is resolved. You will receive hourly updates.

5. Select a department from the drop-down list. Every member of the selected department and your assigned Client Services banking consultants will be notified of the ticket. If you select "Account Manager," the assigned Client Services banking consultants as well as your account manager will be notified.



Department Drop-Down List

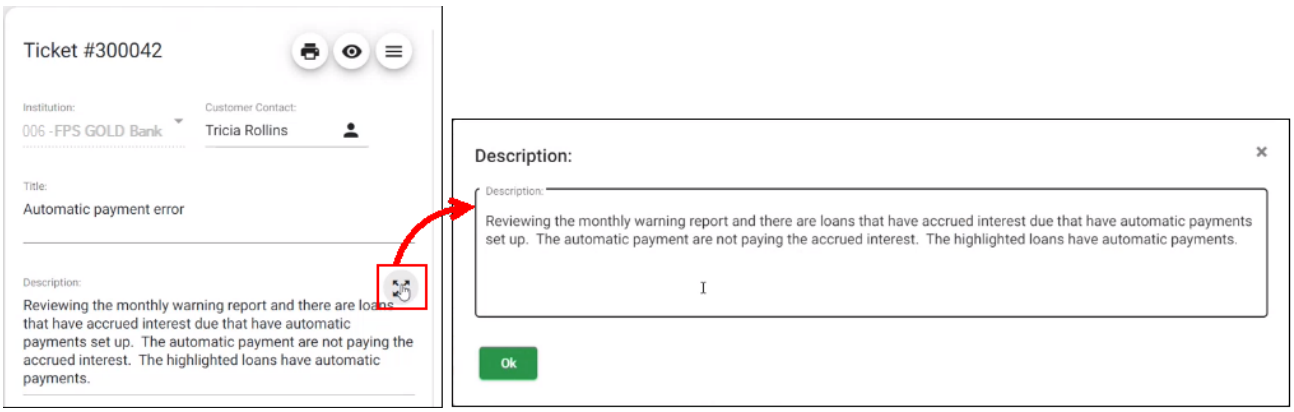
Note: The "Ticket System" department is for reporting problems with the Help Desk system.

6. Attach a file if needed. See [Adding Attachments](#) below for details.

7. Click <Create Ticket>. An email message will be sent to anyone in the department, including your assigned client services banking consultants you selected in Step 5.

Pop-Out Window

If you want to view the description of the ticket in a separate pop-out window, click on the four arrows in the upper-right corner of the Description to view the pop out window. The **Description** box can be expanded by dragging the lower right-hand corner down to view the full description.

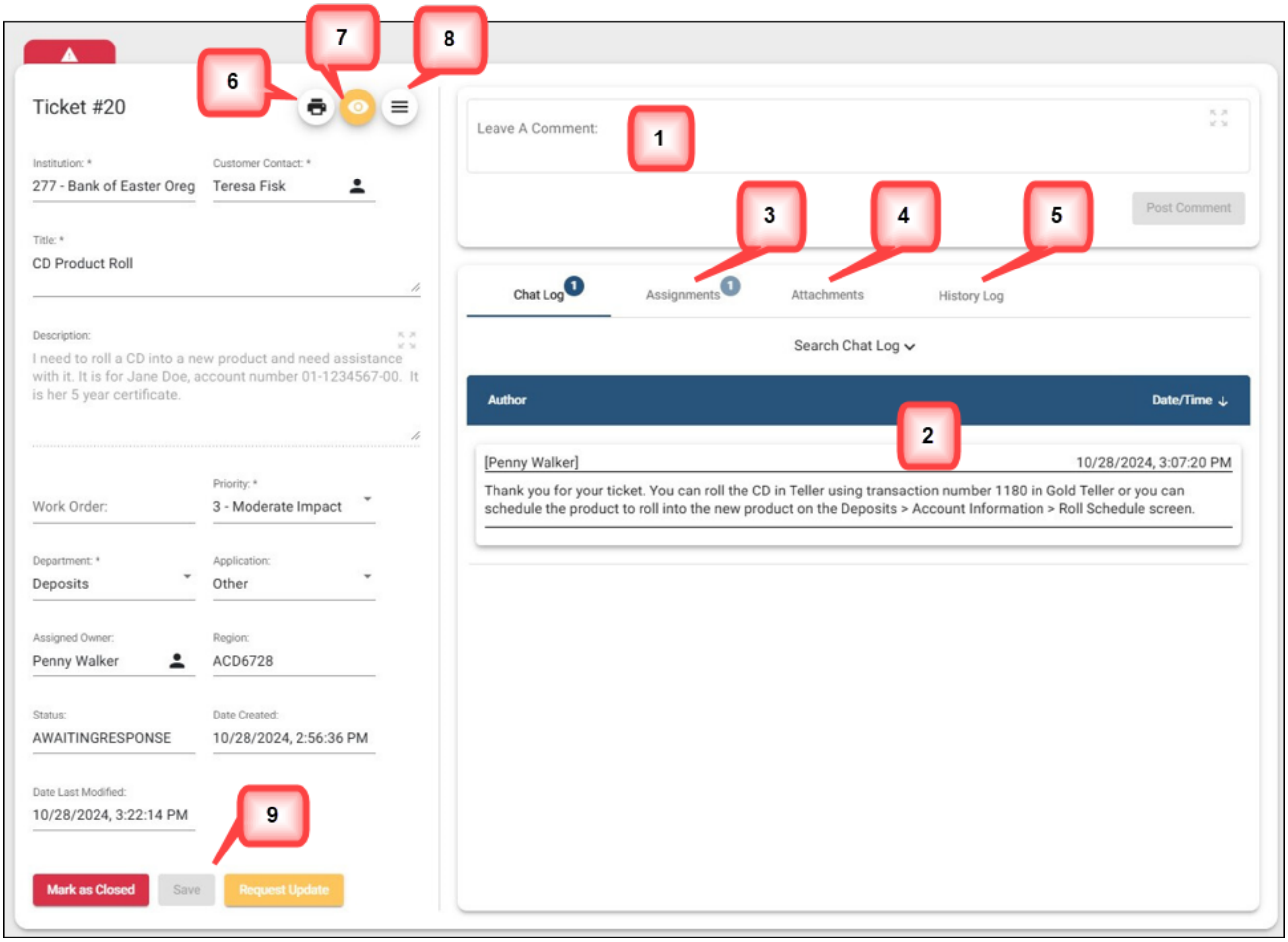


Click the pop-out button to open the Description in a separate window.

Ticket Screen

The screen for a created ticket is always displayed so you can review the details. See the example below.

The numbers on the example below correspond to the numbered explanations after the example.

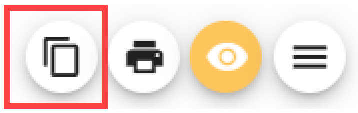


1. In the **Leave a Comment** text box, you can type a comment on the ticket. Click the pop-out icon in the upper-right corner  if you want to open the comment box in its own window. Review Pop out windows above.
2. Comments will post to the Chat Log so FPS GOLD and bank users can see them. You can search in the Chat Log. See Searching the Chat Log below for more information.
3. Click on the Assignments tab to assign the ticket to a user. See Adding Assignments below for more information.
4. Click on the Attachments tab to attach a file, if needed. See Adding Attachments below for more information.
5. Click on the **History Log tab** to view a list of changes made to the ticket since it was created.
6. The **Print Ticket** icon allows you to print the ticket with or without the chat log to your printer or to PDF.
7. The **Watch Ticket** icon allows you to add yourself to a ticket so you can watch the ticket and receive update notifications.
8. The **Hamburger Menu icon** allows you to add others to a ticket to watch the ticket and receive update notifications.
9. Ticket Options:
   - o <Mark as Closed> When the issue has been resolved, click <Mark as Closed> to close the ticket.

- o <Save> If changes are made to the left side of the ticket, click <Save>. Comments, Assignments and Attachments are automatically saved.
- o Click <Request Update> to ask FPS GOLD for information on the status of the ticket. This information is sent to the assigned owner of the ticket.

Clone/Copy Ticket

The Clone the Ticket/Copy icon  appears on closed tickets only and allows you to copy an existing closed ticket to create a new ticket.



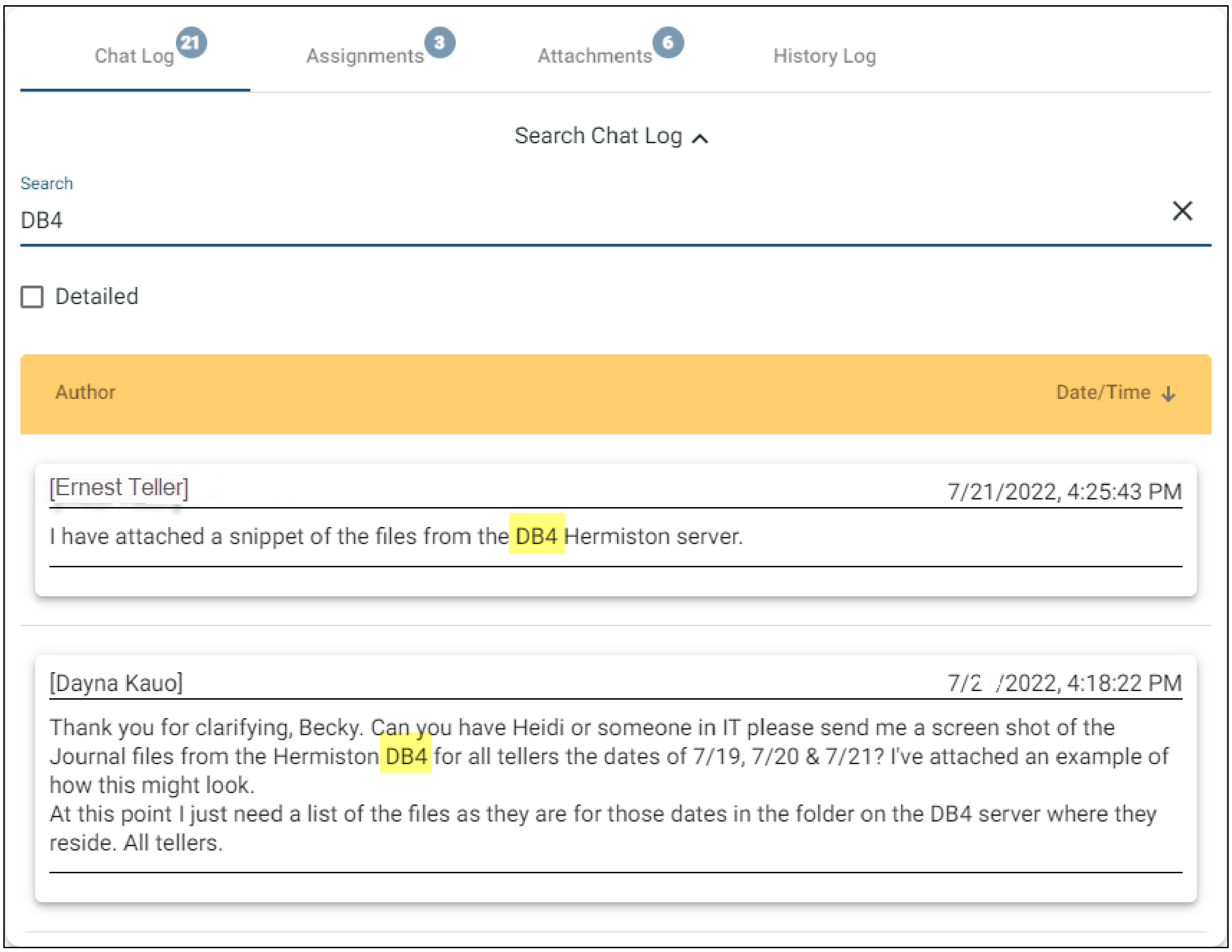
Searching the Chat Log

You can search within the chat log for any ticket. This feature is particularly useful for chat logs with several entries.

To search a chat log:

1. Click <Search Chat Log>.
2. In the **Search** text field, type the information you want to find.

If your search text matches information in the Chat Log, all instances of the found text will be highlighted in the search results. See the example below.



Adding Assignments

After a ticket has been created, an Administrator can assign it to other bank employees to work on or to follow.

To add an assignment:

1. Click on the Assignments tab.
2. Click <Add Assignment>.
3. Enter a title and a description.
4. In the **Complete by date:** field, type a deadline for completion. You can also click on the calendar icon and select a completion date.
5. Click in the **Assignee** field to open the **Search Person** field. You can assign the ticket to anyone who has access to the Help Desk at your institution.
   Tip: To search for a person in the list, begin typing their name in the **Search** text box.
6. Click <Save>.

The system sends an email to FPS GOLD and the selected department or individuals assigned to the ticket. The email contains the ticket name and basic information about it.

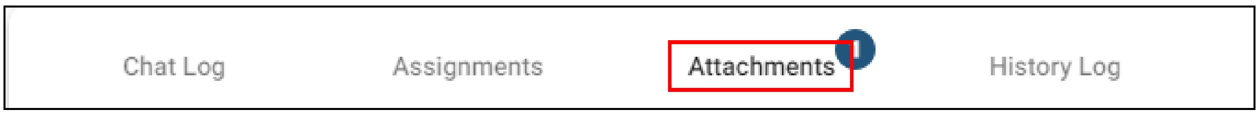
Adding Attachments

When you create or modify a ticket, you can attach files if needed. You can attach multiple files to a ticket, but only one file can be uploaded at a time. Because you're signed onto the FPS GOLD network, attaching files is secure. Files can be in any format (such as Excel, PDF, or CSV).

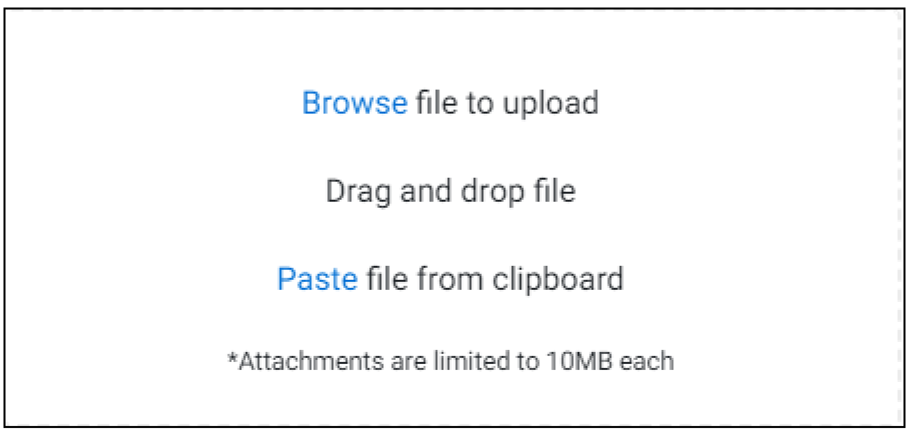
There is a 10 Mb upload limit per file. If you need to upload a larger file, contact FPS GOLD for alternate methods.

To attach a file:

1. Click <Attachments> to open the Attachments options.



2. From the options shown below, select the way you want to attach the file. The options are explained in the table below.

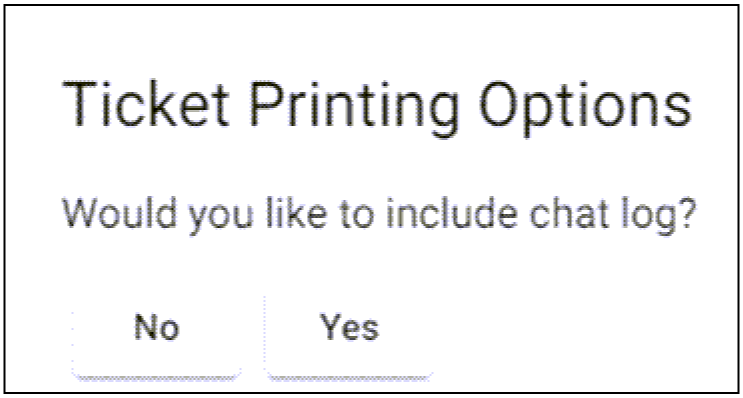


Attach File Options

Option	How to Use It
Browse file to upload	1. Click on <Browse> and select the file from the File Explorer. 2. In the dialog box that opens, select "Add Custom Message" if you want to add a comment. 3. Click <Attach File>.
Drag and drop file	Open File Explorer, then drag the file from its saved location onto the options box.
Paste file from clipboard	Save the file to the Windows Clipboard, then click <Paste>.

Print a Ticket

You have the option to print your ticket with or without comments by clicking on the printer icon. To include the comments, a Ticket Printing Options window will appear for you to select "No" or "Yes" to include the chat log.

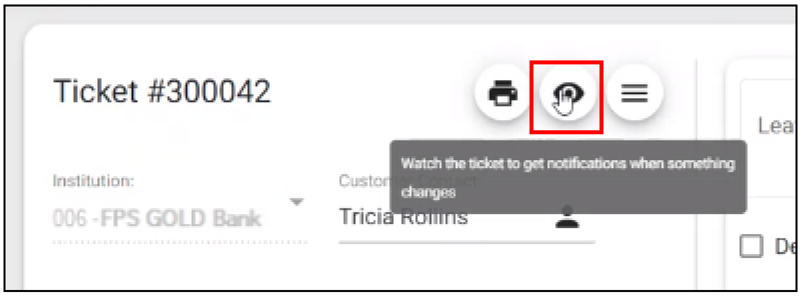


Watch a Ticket

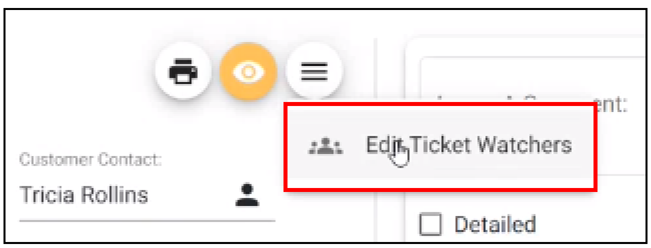
If you want to follow the progress on a ticket but do not need to make any changes to it, you can become a ticket watcher. As a watcher, you will receive email notifications whenever something changes on that ticket.

To watch a ticket:

1. Open the ticket you want to watch.
2. Click on the Watch icon in the upper-right corner.



Note: Admins can click on the Watcher icon to view a list of watchers and edit the list. See the example below.



Searching Help Desk

You can search within Help Desk using various search filters.

To search Help Desk:

1. Click <Search> at the top right of the screen.
2. Enter information you want to find in the field at the top of the screen.

   All tickets containing the search information display on the screen.

   If too many results are returned, you can narrow the search by applying filters.

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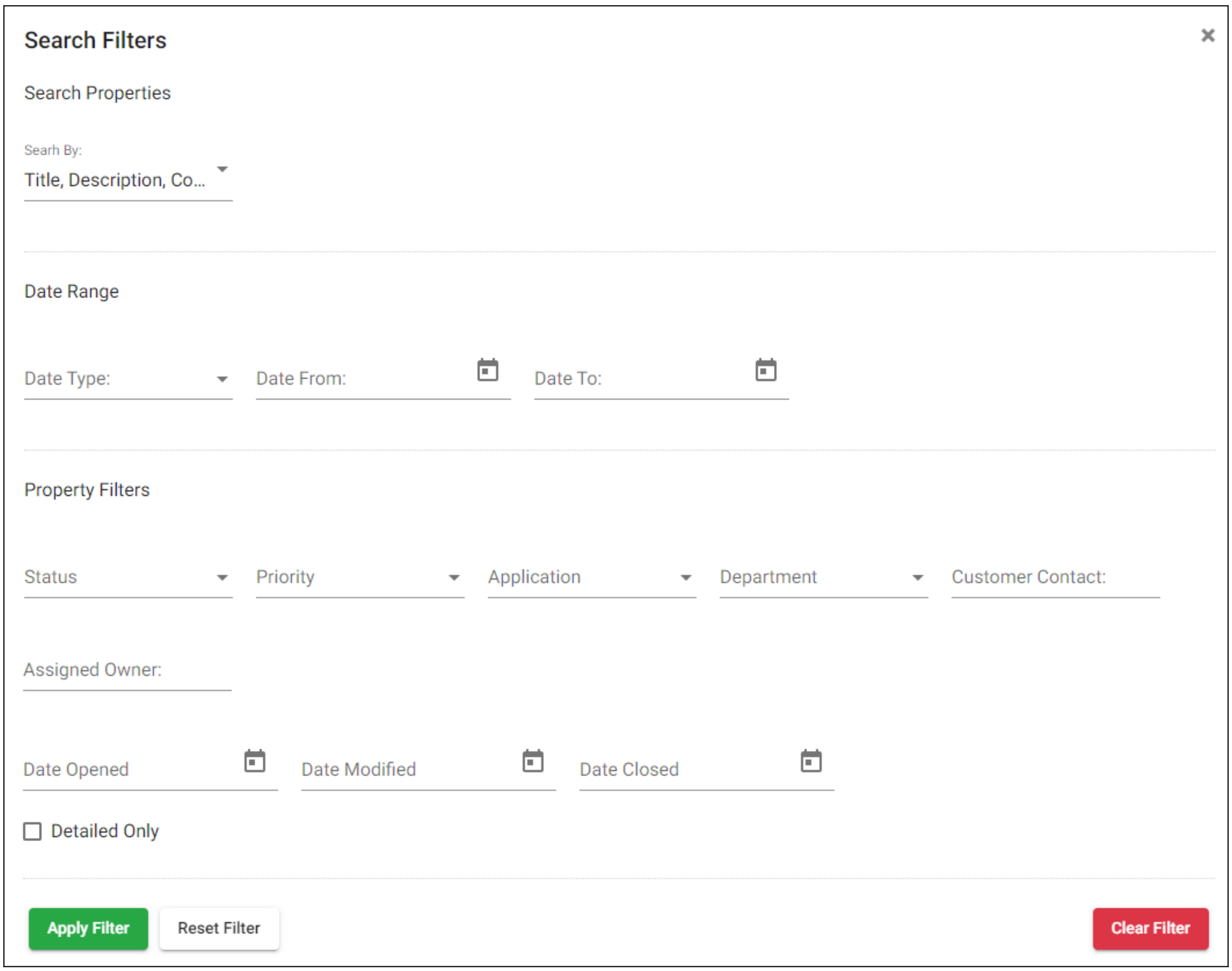
3. Click the  icon at the far right of the search field to open the Search Filters dialog box. See the example below.



Narrowing Your Search

Use the fields on the Search Filters dialog box to limit your search if your original search returns too many results. The field groups are Search Properties, Date Range, and Property Filters.

To narrow your search by Search Properties:

1. Open the **Search By** drop-down list.
2. Choose "Select All" or "Unselect All."
   - "Select All" selects all the options on the drop-down list.
   - "Unselect All" clears all fields in the list and lets you choose any combination of the options.

To search within a Date Range:

1. Select an option from the **Date Type** drop-down list:
   - Select “None” if you don't want to search within specific dates.
   - Select "Date Created" to search within a range of ticket creation dates.
   - Select "Date Last Modified" to search within a range of dates for the most recent ticket change.
   - Select "Date Closed" to search within a range of ticket closing dates.
2. To specify the date range, select a start date **(Date From**) and an end date (**Date To**).

To narrow your search with the Property Filters:

The Property Filters with drop-down menus let you choose "Select All" or "Unselect All" search options. "Unselect All" lets you choose specific fields you want in your search, giving you a wide variety of search options. **Status, Priority, Application**, and **Department** fields all have drop-down menus.

1. To begin your search, enter the appropriate information in the Properly Filter fields you want to use.
2. To change the information in a field during your search, click <Reset Filter> and enter new information.
3. The **Customer Contact** can be removed without selecting the <Reset Filter> button, which clears all search fields on the screen.
4. If FPS GOLD has marked certain chats as "Detailed," you can search within those detailed chats by checking the **Detailed Only** field.
5. When you finish entering information in your selected filter fields, click <Apply Filter> to see your results on the Search screen.
6. To export search results to Excel, click <Export> and then <Generate>.

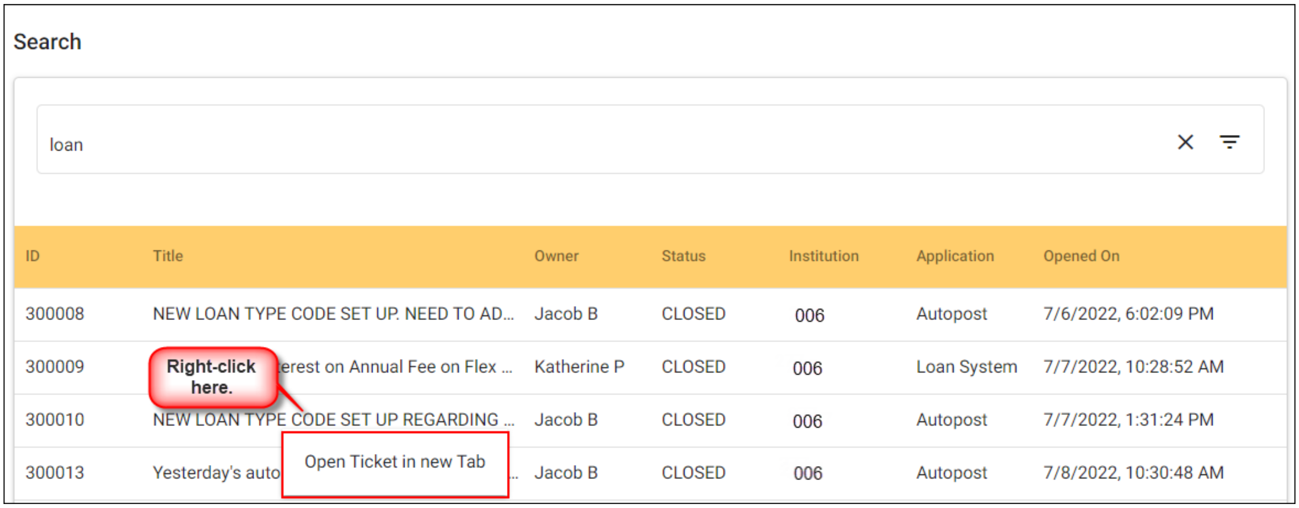
If the search does not yield the results you want, you can start over by clicking the <Clear Filter> button on the Search screen and start a new search.

Open Ticket in New Tab

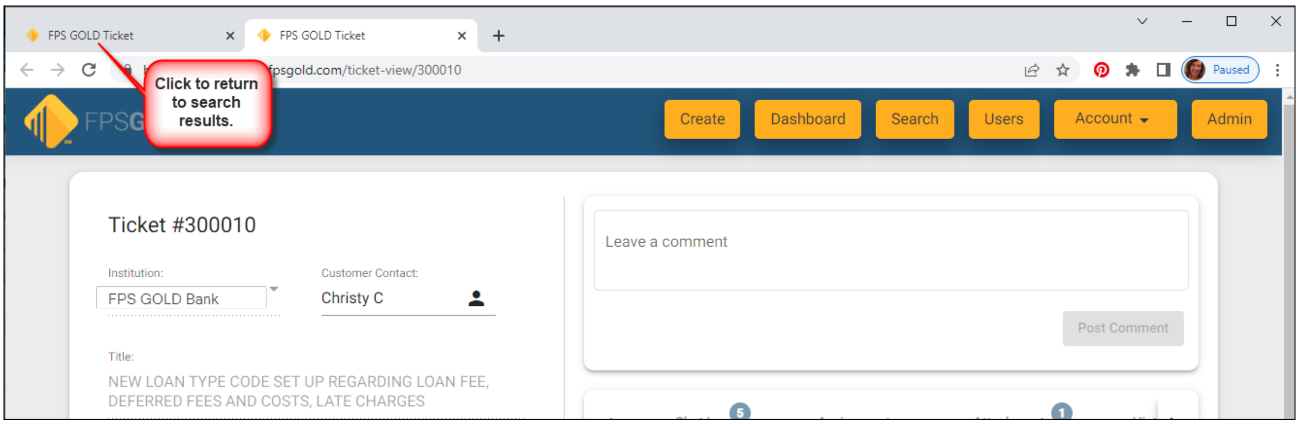
You can view details of any item in the search results list. When you finish viewing the details, you can return to the search results list.

To view details of an item in search results:

1. Right-click on that item.
2. Click "Open ticket in new tab."



Search Screen



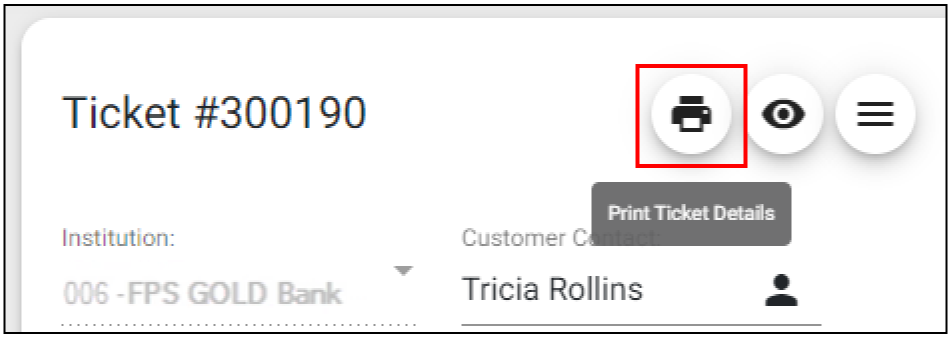
Ticket Details

Printing Tickets

You can easily print tickets using the <Print> button.

To print a ticket:

1. Click the <Print> button on the Tickets screen.



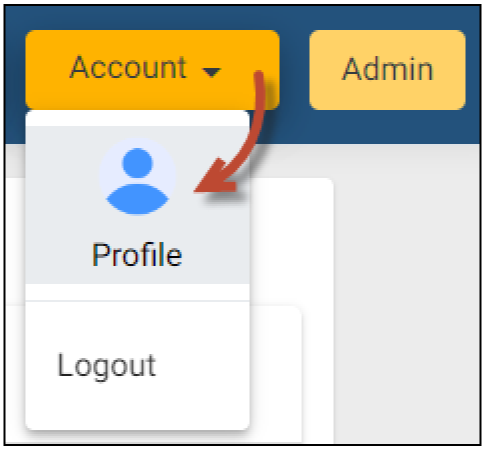
2. Click "Yes" if you want to print the Chat Log, too. In most cases, we recommend that you select "Yes" because most of the information about work done on the ticket is in the Chat Log.

Editing a Profile

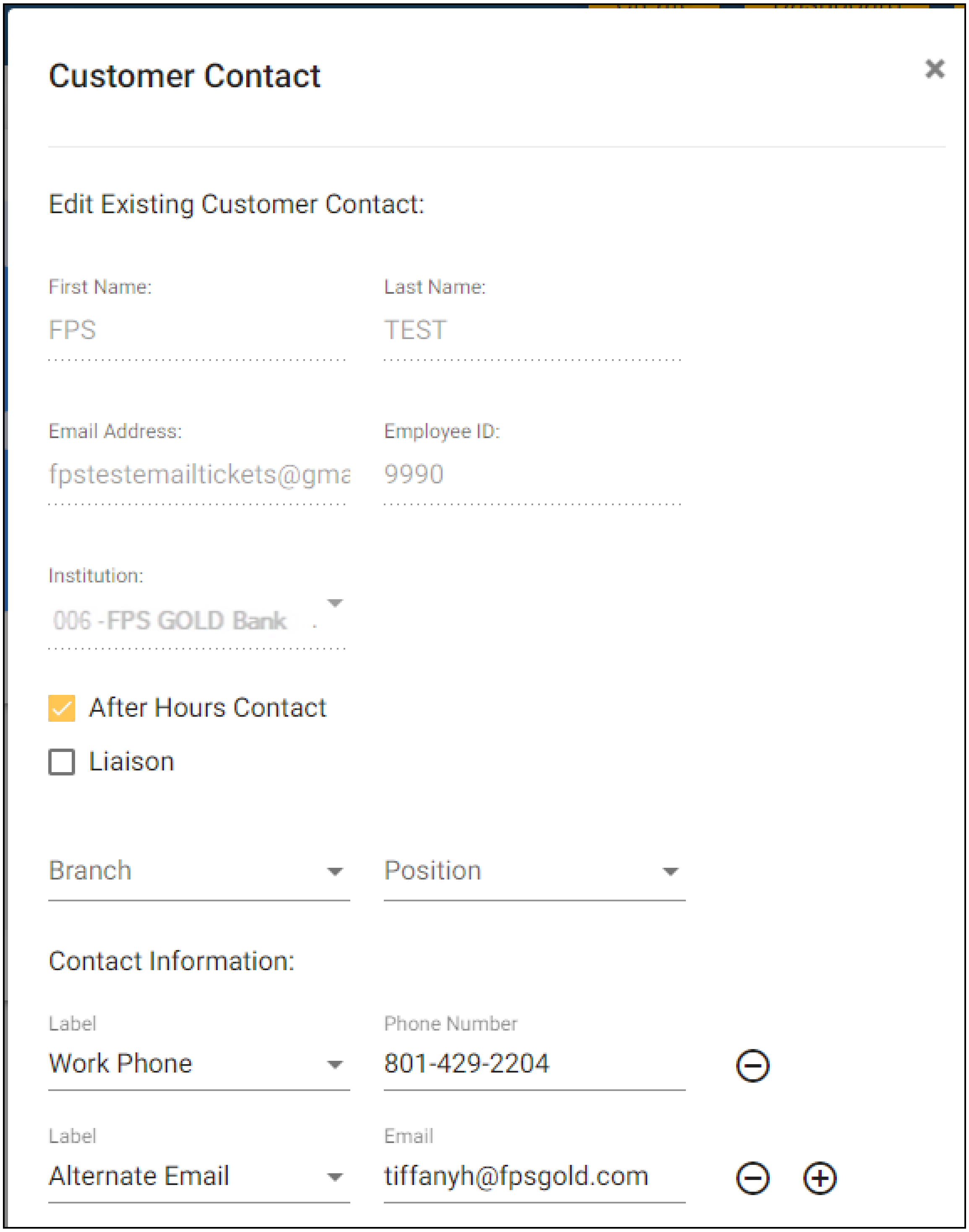
Help Desk users can edit their own information.

To edit a profile:

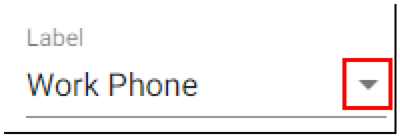
1. Click <Account> and <Profile> at the top right of the dashboard.



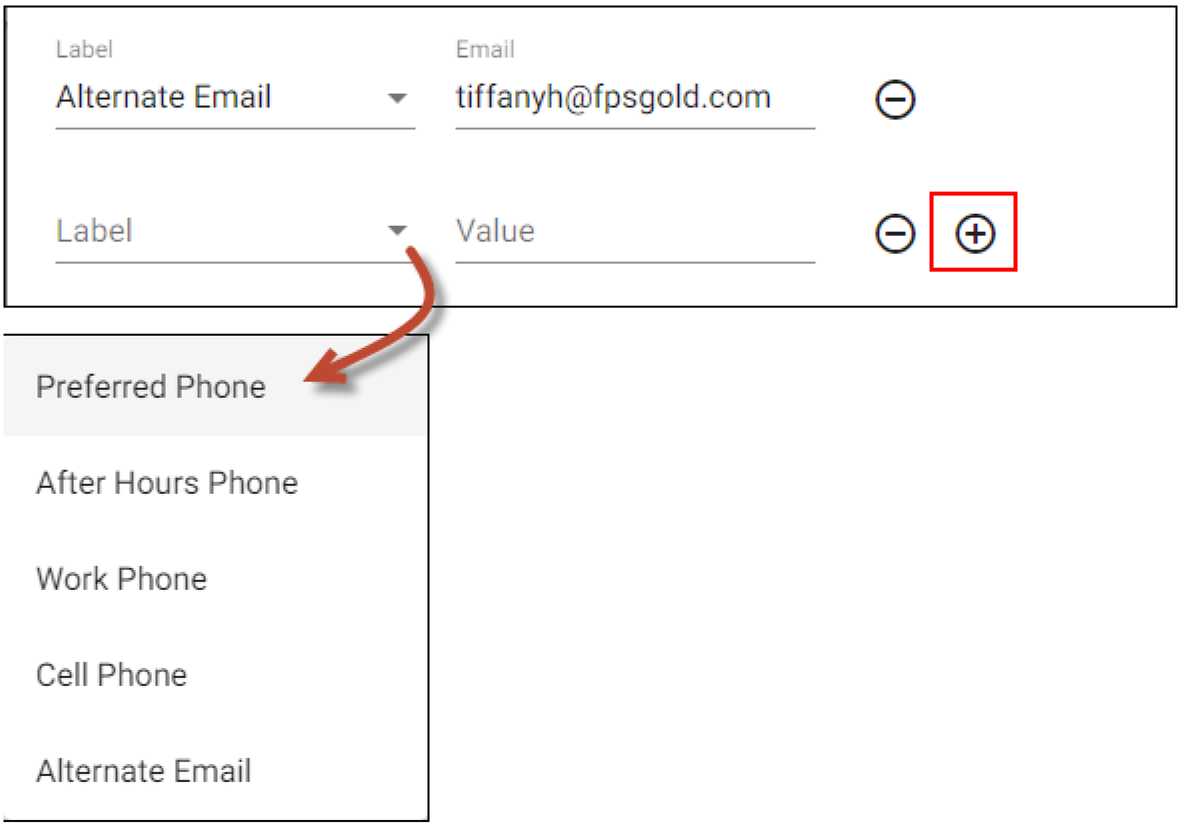
The Customer Contact dialog box opens.



2. Click on **After Hours Contact** or **Liaison** to add those functions to this user.
3. On fields with an inverted triangle at the far right, click the triangle to open a drop-down list and select an option.



4. If a field has a plus sign to the right, click on the plus sign to add alternate phone numbers or email addresses. See the example below.
5. Click the triangle next to the **Label** field and select a field label.
6. Enter the appropriate information (such as a phone number) in the **Value** field.



Creating a Branch or Position

Administrators can create branches and positions. These branches and positions will show as options on the Customer Contact screen drop-down lists. Administrators can also delete branches and positions if no people are assigned to them.

Adding branches and positions is helpful to FPS GOLD so we know where they are located (if you have multiple branches) and what position they hold at the bank.

To create a branch:

1. Click the <Admin> button.
2. Click <Add Branch>.
3. Enter a branch name and click <Create>.

To create a position:

1. Click on the Positions tab.
2. Click <Add Position>.
3. Enter the position name and click <Create>.

Terminated Employees

Currently, the FPS GOLD Help Desk Ticketing System does not have an option to remove terminated employees from the Help Desk system. Users are created and identified by their employee number from CIM GOLD.

The Help Desk Admin can add a position “Terminated” to the position list. When an employee leaves your institution, please mark the position of the employee as terminated. Further programming to address employees no longer with the bank is under development.