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Halo Ticket Anatomy

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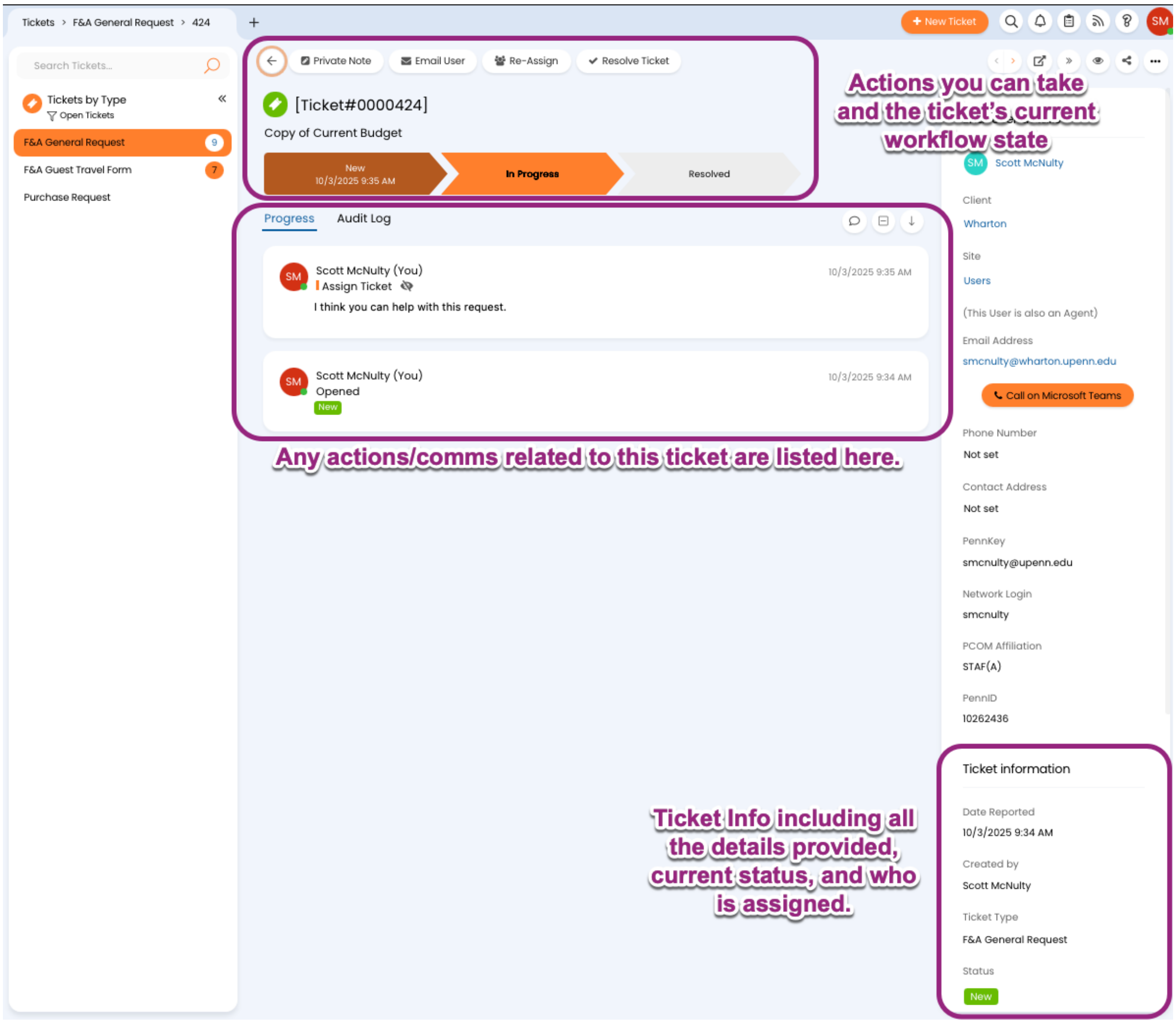
This article explains the various parts of a Halo ticket. It is important to note that there are many types of tickets in Halo, and they all don't look exactly a like. They will all, however, share the same basic structure.

Before You Start

You will need the following before you can complete this task:

- An active Wharton faculty or staff affiliation
- You also need to be logged into the Agent Application to see tickets in Halo.



Everything is a ticket in Halo, well, nearly everything. That means as an agent, you'll be spending a lot of time on individual tickets doing work.

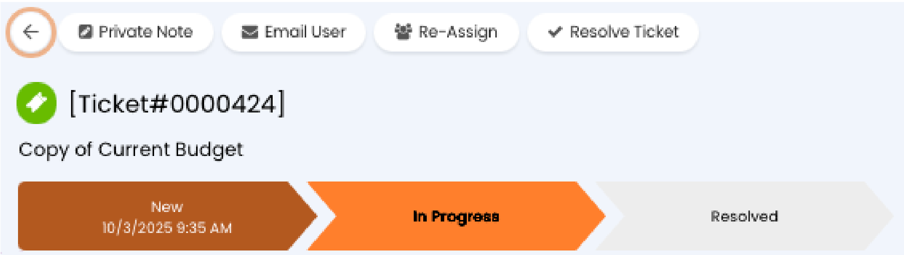
Before we dive into the parts of a ticket, there are a couple of things to be aware of:

- Halo's interface is responsive. This means it'll move things around on the screen depending on your screen's

size. We will try to note when things might move, but just be aware that Halo might look a little different on your screen; all the options are the same.
- Speaking of options, different modules will have different ticket types which will have different actions associated with them (those are the buttons at the top of the ticket, as seen in the screenshot above).

To get to a ticket log into Halo, click on a module, and click on a ticket in the list. The ticket detail screen will open (as seen above). There are four main areas of a ticket:

Actions and State



Along the top of any ticket in Halo you'll find action buttons (Private Note as an example from the screenshot above) and arrows depicting where that ticket is in its workflow (the ticket above is in progress).

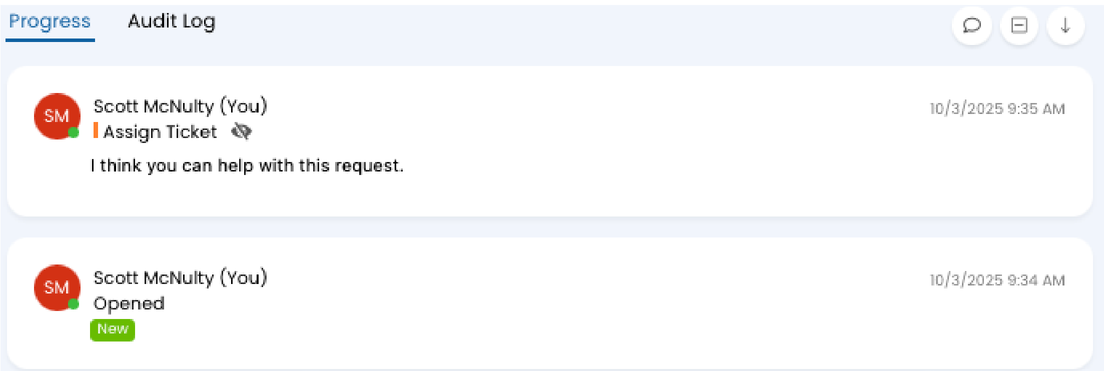
The values of both of these items are dependent on the ticket type, so you'll see different things in different tickets. Also, keep in mind that some action buttons become available during certain workflow stages.

To use an action button, just click on it.

Different ticket types have different actions, but some examples of common actions include:

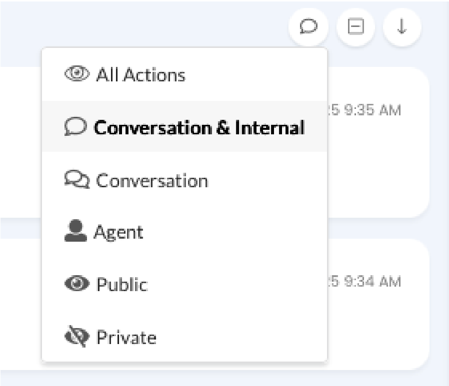
- Assign - Available on new and closed tickets, this action allows you to assign the ticket to an agent (including yourself).
- Re-Assign - Available on assigned tickets, this action allows you to assign the ticket to someone else. You can re-assign any ticket that is assigned to someone, no matter the status (including closed tickets).
- Private Note - Make a note for other agents to see on a ticket. These notes aren't shared with the requester.
- Email User - Send an email from Halo to the requester right from the ticket. The text of the email will be displayed in the Progress section of the ticket, as will any replies.
- Resolve Ticket - Changes the status of the ticket to closed, though an email to the requester is required.
- Re-Open Ticket - Available on closed tickets, this allows you to re-open a ticket to continue working on it.

Progress Feed and Audit Log



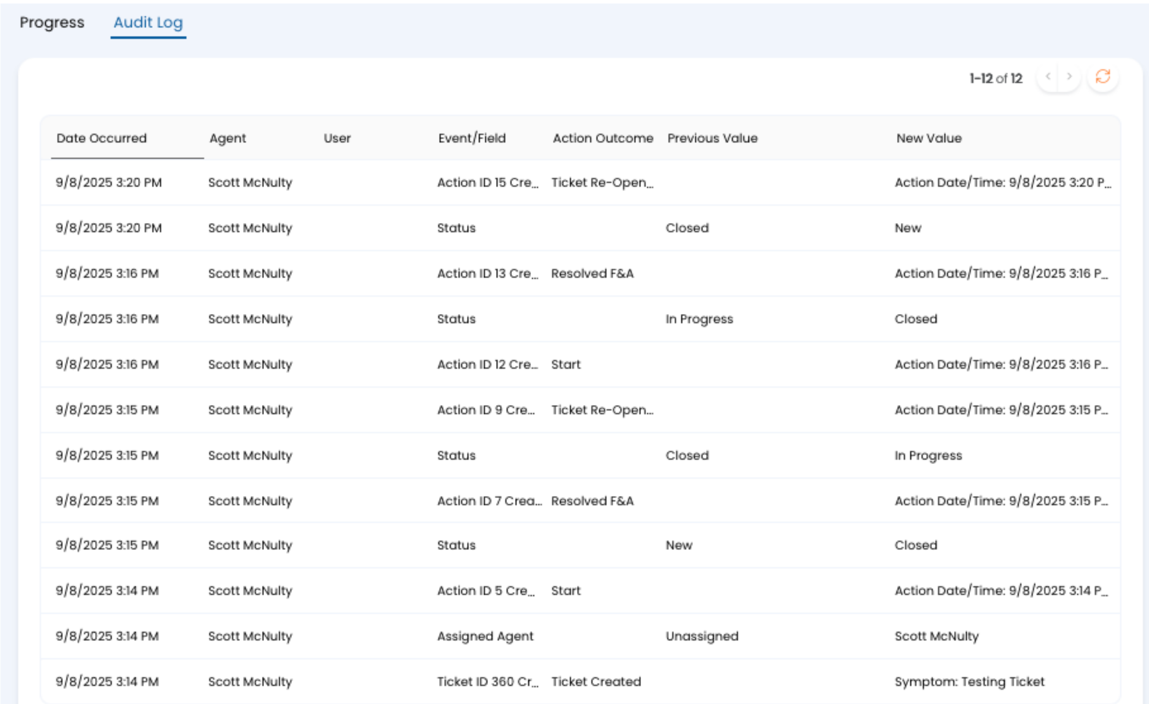
Each ticket will have a Progress feed and an Audit Log, which show information related to the ticket.

The Progress feed shows any actions taken on the ticket, and who took them. As you can see in the screenshot above, Scott McNulty opened a ticket and then assigned it to someone (in this case, himself).



At the top right of the Progress feed, you'll see three buttons:

- The "speech bubble" allows you to filter which actions you see listed in the Progress feed. By default, Conversations & Internal is selected, which shows internal notes and any emails associated with the ticket. Conversation only shows emails, Agent will show you only actions taken by agents, Public will show actions that a requester will be able to see in the portal (if one is available), and Private will only list things the requester can't see.
- The Minus button will collapse the entries in the Progress feed.
- The down arrow scrolls to the bottom of the list.



Date Occurred	Agent	User	Event/Field	Action Outcome	Previous Value	New Value
9/8/2025 3:20 PM	Scott McNulty		Action ID 15 Cre...	Ticket Re-Open...		Action Date/Time: 9/8/2025 3:20 P...
9/8/2025 3:20 PM	Scott McNulty		Status		Closed	New
9/8/2025 3:16 PM	Scott McNulty		Action ID 13 Cre...	Resolved F&A		Action Date/Time: 9/8/2025 3:16 P...
9/8/2025 3:16 PM	Scott McNulty		Status		In Progress	Closed
9/8/2025 3:16 PM	Scott McNulty		Action ID 12 Cre...	Start		Action Date/Time: 9/8/2025 3:16 P...
9/8/2025 3:15 PM	Scott McNulty		Action ID 9 Cre...	Ticket Re-Open...		Action Date/Time: 9/8/2025 3:15 P...
9/8/2025 3:15 PM	Scott McNulty		Status		Closed	In Progress
9/8/2025 3:15 PM	Scott McNulty		Action ID 7 Crea...	Resolved F&A		Action Date/Time: 9/8/2025 3:15 P...
9/8/2025 3:15 PM	Scott McNulty		Status		New	Closed
9/8/2025 3:14 PM	Scott McNulty		Action ID 5 Cre...	Start		Action Date/Time: 9/8/2025 3:14 P...
9/8/2025 3:14 PM	Scott McNulty		Assigned Agent		Unassigned	Scott McNulty
9/8/2025 3:14 PM	Scott McNulty		Ticket ID 360 Cr...	Ticket Created		Symptom: Testing Ticket

The Audit Log records everything that has happened to this ticket, the agent or user who did the action, and the various status changes.

Click on a column header to sort by that value. Hover over a header and click on the filter icon to filter the columns.

End-User Details and Ticket information

Depending on your screen size you'll find some more information on the far right of the ticket or in tabs:

End-User details - this lists all the information in Halo about the requester, including their name, email address, Penn, and affiliation (staff, faculty, and so on). Click on the requester's name to see all the tickets associated with them that are visible to you.

Ticket information - Here you'll find when the ticket was opened, who created it, the type, status, assigned team, and the details.

> Depending on your screen size, these panels will either be listed side by side on the right, above one another in a single column on the right, or in a tab called Details in between Progress and Audit Log above the ticket's Progress feed.