# PMTNM Helpdesk & Workflow System - Complete Guide

## PMTNM Helpdesk & Workflow System - Complete Guide

**Professional Music Teachers of New Mexico**

**Communication & Request Management System**

**Last Updated:** January 4, 2026

**Version:** 2.0

**For:** All Members, Administrators, and Workflow Managers

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## System Overview

### What Is This System?

The PMTNM Helpdesk & Workflow System is a comprehensive communication and request tracking platform that ensures all member inquiries, requests, and communications are properly:

- **Received** - Every request is logged with a unique ticket ID

- **Routed** - Requests automatically go to the right person

- **Tracked** - Complete status visibility from submission to completion

- **Resolved** - Documented closure with quality approval

- **Audited** - Full history of all actions and communications

Think of it as a professional support ticket system specifically designed for PMTNM's needs.

## Why We Use This System

**Before This System:**

- ☐ Emails could get lost in inboxes

- ☐ No way to track if requests were handled

- ☐ Hard to tell who was responsible

- ☐ Difficult to follow up on old requests

- ☐ No accountability or oversight

**With This System:**

- ☐ Every request is logged and tracked

- ☐ Clear assignment and responsibility

- ☐ Complete status visibility

- ☐ Automatic notifications and reminders

- ☐ Quality control and approval process

- ☐ Complete audit trail for governance

## Core Principles

1. **Transparency** - Everyone knows what's happening

2. **Accountability** - Every action is logged and attributable

3. **Communication** - All parties stay informed automatically

4. **Quality** - Workflow manager oversight ensures proper completion

5. **Simplicity** - Easy to use, hard to lose track of requests

# For Members: How to Use the System

## Submitting a Request

**Step 1: Access the Contact Form**

Visit: **https://pmtnm.org/contact.php**

Or use the navigation menu: **Contact Us**

**Step 2: Choose Your Request Type**

Select from the dropdown menu:

- **Financial Records Access Request** (members only - login required)
- **Membership Inquiry** (anyone - public access)
- **Get Involved - Volunteer Interest** (anyone - public access)

**Step 3: Fill Out the Form**

**Required Information:**

- Your Name
- Your Email
- Subject (auto-filled based on workflow type)
- Message (explain your request in detail)

**Workflow-Specific Fields:**

- **Financial Access:** Select which documents you need (checklist)
- **Other workflows:** Just provide your message

**Step 4: Submit and Receive Confirmation**

After clicking "Send Message":

1. **On-screen confirmation** with your ticket number
2. **Email confirmation** with:
   - Your unique ticket ID (e.g., `ticket_abc123...`)
   - Link to track your request
   - Expected response time

- Reference information

**Step 5: Track Your Request**

**Option A: My Requests Page**

- Visit: [https://pmtnm.org/workflow/my_requests.php](https://pmtnm.org/workflow/my_requests.php)

- See all your submitted and assigned requests

- Filter by status (pending, fulfilled, resolved)

**Option B: Email Links**

- All notification emails include direct links to view your ticket

- Click links to see current status and history

## Understanding Request Status

Your request moves through several statuses:

**⬜ Pending Response**

- **What it means:** Request received and sent to the responsible person

- **What happens next:** They're working on it

- **Your action:** Wait for their response (deadline varies by workflow type)

**⬜ Responded**

- **What it means:** Responsible person sent you a message

- **What happens next:** You can review their response

- **Your action:**

  - Mark as resolved if satisfied, OR

  - Continue discussion if needed

**⬜ Fulfilled (Pending Your Confirmation)**

- **What it means:** Responsible person believes they've completed your request

- **What happens next:** You need to confirm

- **Your action:** Submit closure request with documentation

**⬜ Closure Pending Approval**

- **What it means:** You submitted closure documentation, workflow manager is reviewing
- **What happens next:** Manager will approve or deny
- **Your action:** Wait for manager review

## ☐☐ Resolved

- **What it means:** Request complete, closure approved, ticket closed
- **What happens next:** Nothing - request is successfully completed
- **Your action:** None needed

## ☐☐ Unresolved

- **What it means:** You indicated the request wasn't completed satisfactorily
- **What happens next:** Responsible person will take additional action
- **Your action:** Work with recipient to address issues

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# Available Workflows

## 1. Financial Records Access Request

**Purpose:** Request access to PMTNM financial records per handbook requirements

**Who Can Use:** Members only (login required)

**Goes To:** Executive Secretary-Treasurer (figaro1226@gmail.com)

**Also CC'd:**

- President (governance oversight)
- Workflow Manager (system tracking)

**Response Deadline:** 14 days

**Special Features:**

- Document checklist (select specific records needed)
- President automatically notified (governance requirement)
- Handbook basis: Section VI - "Financial records shall be open to any member at all times"

**What You Can Request:**

- Financial ledger/register

- Checkbook/transaction records

- Receipts and vouchers

- CPA reports

- Budget documents

- Other (specify in message)

**Typical Outcome:**

- Documents provided in PDF format

- Sent via secure email

- Confirmation of receipt required

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## 2. Membership Inquiry

**Purpose:** Ask questions about membership, benefits, fees, or application

**Who Can Use:** Anyone (public access)

**Goes To:** System Administrator (wgmilleriii@gmail.com)

**Also CC'd:**

- Workflow Manager (system tracking)

**Response Deadline:** 7 days ⚡ (fastest response time)

**Special Features:**

- Open-ended (no checklist - ask any question)

- Fastest response time (first impressions matter)

- Public access (encouraging inquiries)

**Example Questions:**

- "How much does membership cost?"

- "What are the benefits of joining?"

- "Is there a local district in my area?"

- "How do I renew my membership?"

- "Can I join if I teach privately?"

**Typical Outcome:**

- Detailed answers to your questions
- Application forms and instructions
- Contact information for follow-up

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## 3. Get Involved - Volunteer Interest

**Purpose:** Express interest in volunteering or getting involved with PMTNM activities

**Who Can Use:** Anyone (public access)

**Goes To:** President (lspitzer@nmsu.edu)

**Also CC'd:**

- Workflow Manager (system tracking)

**Response Deadline:** 14 days

**Special Features:**

- Goes directly to President (personal attention)
- Open-ended (describe your interests and skills)
- Thoughtful committee matching

**What to Include:**

- Areas that interest you (programs, festivals, technology, etc.)
- Your teaching background and expertise
- Time you can commit
- Leadership experience
- Specific committees you're curious about
- What you hope to contribute

**Typical Outcome:**

- Introduction to committee chair
- Invitation to next meeting

- Project collaboration opportunity
- Mentorship assignment

# Request Lifecycle

## Complete Flow Diagram

```
SUBMISSION

    ↓

[Member fills contact form]

    ↓

TICKET CREATED

    ↓

[Email sent to recipient, originator, and CC list]

    ↓

PENDING RESPONSE

    ↓

[Recipient takes action]

    ↓

    ├──→ RESPONDED (sent message) ──→ [Member reviews]
    |                                        ↓
    └──→ FULFILLED (marked complete) ──→ [Member submits closure request]

                                              ↓

                              CLOSURE PENDING APPROVAL

                                         ↓

                              [Workflow Manager reviews]

                                         ↓

                         ┌───────────────┐
                         |               |
                     APPROVED          DENIED
                        |                 |
                     RESOLVED      [Back to FULFILLED]
                     (CLOSED)      [Resubmit needed]
```

## Timeline Example

**Day 1:** Member submits financial records request

**Day 2:** Secretary-Treasurer acknowledges receipt

**Day 8:** Secretary-Treasurer marks as fulfilled (sent documents)

**Day 9:** Member submits closure request with documentation

**Day 10:** Workflow Manager approves closure

**Status:** Resolved (closed)

**Total Time:** 10 days (within 14-day deadline)

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# Closure Approval Process

## What Changed?

**Important:** All workflow tickets now require formal closure approval before they can be marked as resolved.

## Why This Process?

This ensures:

- ☐ Proper documentation of completion
- ☐ Workflow manager oversight
- ☐ Quality control and accountability
- ☐ Complete audit trail
- ☐ Governance compliance

## How It Works

**Old Process (Before)**

1. Recipient fulfills request
2. You mark as resolved
3. Ticket closes

**New Process (Current)**

1. Recipient fulfills request
2. You submit closure request with documentation
3. **Workflow manager reviews and approves**
4. Ticket closes

## Submitting a Closure Request

When a request is marked as fulfilled, you'll see a closure request form:

**Step 1: Document Completion**

Write detailed notes explaining how the request was fulfilled:

**Required Information:**

- What was provided/done

- When it was completed (specific dates)

- How it was delivered (email, mail, in-person)

- Confirmation of receipt (if applicable)

**Maximum:** 5,000 characters

**Example - Good Documentation:**

```
Received financial records on January 9, 2026 via email.

Documents provided:
- 2024 Monthly financial statements (Jan-Dec)
- 2024 Annual budget summary
- External audit report from CPA firm
- Summary document explaining key figures

Delivery:
- Sent via email on 1/9/2026 at 2:30 PM
- Confirmed receipt via reply email same day
- All documents in PDF format as requested

All requested documents provided per handbook requirements.
```

**Example - Needs Improvement:**

```
Got the files.
```

*Why?* Not enough detail for workflow manager to verify completion.

**Step 2: Attach Supporting Files (Optional)**

Upload files that prove or document completion:

**Examples:**

- PDF copies of what was provided

- Screenshots of sent messages

- Confirmation emails

- Receipts or proof of delivery

**Allowed File Types:**

- PDF (.pdf)

- Images (.jpg, .jpeg, .png)

- Documents (.doc, .docx)

**Limits:**

- 10MB per file maximum

- 5 files per closure request

- 50MB total per ticket

**Step 3: Submit for Approval**

Click "Submit Closure Request for Approval"

You'll receive:

- Confirmation message

- Email notification

- Status change to "Closure Pending Approval"

**Step 4: Wait for Review**

**Workflow Manager reviews your documentation:**

- Checks completeness

- Verifies dates and details

- Reviews attached files

- Confirms handbook compliance

**Review Goal:** 24-48 hours

## If Your Closure Request is Approved

**You'll receive an email:**

- Confirmation of approval

- Any notes from workflow manager
- Ticket status: Resolved (closed)

**No further action needed!**

## If Your Closure Request is Denied

⚠ **You'll receive an email explaining:**

- Why it was denied
- What needs to be addressed
- Specific requirements for resubmission

**Next Steps:**

1. Read the denial reason carefully
2. Work with the recipient if needed
3. Address the issues mentioned
4. Resubmit with updated documentation

**The ticket remains open** until properly documented and approved.

## Tips for Good Documentation

**Be Specific:**

- ☐ "Provided information"
- ☐ "Sent PDF copies of all 2024 board meeting minutes via email on 1/9/2026"

**Include Dates:**

- ☐ "Sent last week"
- ☐ "Sent on January 9, 2026 at 2:30 PM"

**Explain What Was Provided:**

- ☐ "Gave them what they asked for"
- ☐ "Provided: (1) membership application form, (2) payment instructions, (3) welcome packet"

**Include Confirmation:**

- ☐ "They should have received it"

- ⬜ "Member confirmed receipt via email (attached)"

**Attach Evidence:**

- Upload confirmation emails
- Screenshots of sent messages
- Receipts or proof of delivery

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# For Recipients: Handling Requests

## Receiving a Request

When you receive a workflow request email:

**Email Contains:**

- Ticket ID
- Request details
- Originator information
- Response deadline
- **Action buttons** (use these, don't reply to email!)

**Important:** Do NOT reply directly to the email. Use the buttons or system interface.

## Taking Action

You have two main options:

**Option 1: Respond with Message**

Use when you need to:

- Ask clarifying questions
- Provide partial information
- Update the originator on progress

**How:**

1. Click "⬜ Respond with Message" button in email
2. Enter your response

3. Submit

**What happens:**

- Originator receives your message
- Ticket status changes to "Responded"
- They can mark as resolved or continue discussion

**Option 2: Mark as Fulfilled**

Use when you have completed the request:

**How:**

1. Click "✓ I have fulfilled this request" button
2. Optionally add fulfillment notes (recommended)
3. Submit

**What happens:**

- Originator receives fulfillment notification
- They must submit closure request
- Workflow manager reviews and approves

## Response Deadlines

- **Financial Access Requests:** 14 days
- **Membership Inquiries:** 7 days (fastest!)
- **Volunteer Interest:** 14 days

**Tip:** Respond as quickly as possible. Deadlines are maximums, not targets.

## Resending Confirmation Requests

If originator hasn't submitted closure request:

1. You'll see "Resend Confirmation Request" button
2. Click it to send reminder email
3. Helps ensure requests don't get forgotten

# For Workflow Managers: Closure Approvals

## Your Role

As Workflow Manager, you ensure proper completion before tickets close:

**Key Responsibilities:**

1. Review closure requests for completeness

2. Approve valid requests

3. Deny incomplete requests with specific feedback

4. Maintain consistent quality standards

5. Provide guidance to improve documentation

## Accessing Closure Approvals

**Direct URL:** https://pmtnm.org/workflow/admin/closure_approvals.php

**Or:** Admin Menu → Workflow Admin → Closure Approvals

**Via Email:** Click "Approve Closure" or "Deny Closure" buttons in notification emails

## Reviewing a Closure Request

For each request, you'll see:

**1. Original Request Details:**

- Who submitted it

- What they requested

- When it was submitted

- Workflow type

**2. Fulfillment Information:**

- Who handled the request

- When they marked it fulfilled

- Their fulfillment notes

**3. Closure Documentation:**

- Documentation notes from originator

- Explanation of completion

- Dates and specific actions

- Attached supporting files (if any)

**4. Message Thread:**

- Complete communication history

- All responses and updates

## What to Check

**Documentation Completeness:**

- Are all required actions explained?

- Are dates and specifics included?

- Is it clear how the request was fulfilled?

**Supporting Evidence:**

- Do attached files support the claim?

- Are files relevant and appropriate?

- Is evidence credible?

**Handbook Compliance:**

- Does completion meet handbook requirements?

- Were proper procedures followed?

- Any governance concerns?

**Quality Standards:**

- Is documentation professional?

- Sufficient detail for audit purposes?

- Future reference value?

## Approving a Closure Request

**When to Approve:**

- Documentation is complete and detailed

- Supporting files verify completion (if applicable)

- Handbook requirements clearly met

- No outstanding concerns

- Request was genuinely fulfilled

**How to Approve:**

1. Review all documentation thoroughly

2. (Optional) Add approval notes

3. Click "✓ Approve and Close Ticket"

4. Confirm in popup dialog

**What Happens:**

- Ticket status changes to "Resolved"

- Ticket is closed

- Originator and recipient receive approval notification

- Event logged to history

## Denying a Closure Request

**When to Deny:**

- Documentation is vague or incomplete

- Missing critical information

- No evidence of actual completion

- Handbook requirements not clearly met

- Insufficient detail for audit trail

- Concerns about whether request was truly fulfilled

**How to Deny:**

1. Identify what's missing or incorrect

2. Write clear, specific denial reason (Required)

3. Click "✗ Deny and Request Changes"

4. Confirm in popup dialog

**What Happens:**

- Ticket status reverts to "Fulfilled (Pending Confirmation)"
- **Both** originator and recipient notified
- Your denial reason sent to both parties
- They can work together to address issues
- They can resubmit when ready

## Writing Good Denial Reasons

**Be Specific:**

- ❌ "Incomplete documentation"
- ✅ "Documentation doesn't include confirmation that member received the files. Please attach the member's acknowledgment email or provide the date/time of confirmed delivery."

**Be Constructive:**

- ❌ "This isn't good enough"
- ✅ "Please add: (1) specific dates documents were sent, (2) list of exact files provided, (3) member's confirmation of receipt"

**Be Clear:**

- Explain what needs to be added
- Give examples if helpful
- Reference handbook requirements if applicable

## Review Criteria by Workflow Type

**Financial Records Access Requests**

**Must document:**

- Specific records provided
- Format (PDF, hard copy, etc.)
- Delivery method and date
- Confirmation of member receipt
- Compliance with handbook requirements

**Good example:** "Provided 2024 financial records including monthly statements, annual budget, and audit report. Files delivered via email on 1/9/2026 at 2:30 PM. Member confirmed receipt same day. All documents in PDF format per handbook requirements."

**Membership Inquiries**

**Must document:**

- What information was provided
- How member was helped
- Any follow-up actions taken
- Confirmation of satisfaction

**Good example:** "Explained membership benefits, fees, and application process. Sent membership application form and payment instructions via email on 1/9/2026. Provided contact for questions. Member confirmed they have what they need."

**Volunteer Interest Requests**

**Must document:**

- How volunteer was connected
- Committee or role identified
- Next steps explained
- Follow-up scheduled (if applicable)

**Good example:** "Connected volunteer with Programs Committee Chair. Scheduled introductory meeting for 1/15/2026. Sent committee information and volunteer handbook. Chair confirmed follow-up planned."

## Best Practices

**Review Timing:**

- Goal: Review within 24-48 hours of submission
- Keeps workflow moving
- Shows respect for members
- Maintains system credibility

**Consistency:**

- Apply same criteria to all requests

- Don't be overly strict or lenient

- Document your decision-making

**Communication:**

- Approval notes: Optional but appreciated

- Denial reasons: Always required and specific

- Focus on improvement, not criticism

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# For Administrators: Helpdesk Mode

## What is Helpdesk Mode?

Helpdesk Mode is a safe, read-only view that allows administrators to view user accounts for support and troubleshooting purposes **without risk of sending emails or creating tickets**.

**Old Name:** "Impersonate User" (confusing)
**New Name:** "Helpdesk Mode" (clear purpose)

## Key Features

 **What You CAN Do:**

- View all user data

- Navigate the site as the user

- Test user interface

- Troubleshoot issues

- See their perspective

 **What You CANNOT Do:**

- Send emails

- Create workflow tickets

- Make permanent changes

- Reset passwords

- Submit forms

## Why These Restrictions?

**Safety:**

- No accidental emails sent while viewing accounts

- No accidental tickets created during troubleshooting

- Read-only guarantees no permanent changes

**Clarity:**

- Unmissable visual warnings on all pages

- Clear naming: "Helpdesk Mode" not "Impersonate"

- Required acknowledgment checkbox

**Audit Trail:**

- All activations logged

- All blocked actions logged

- Admin email and reason always recorded

## Entering Helpdesk Mode

**Access:** Admin → User Management → Helpdesk Mode

**Or:** https://pmtnm.org/admin/user_management/helpdesk_mode.php

**Steps:**

1. Enter user email and click "Find User"

2. Enter a reason for viewing (required)

3. Check the "I understand this is READ-ONLY" box

4. Click "Enter Helpdesk Mode"

**You'll be logged in as that user with restrictions active.**

## While in Helpdesk Mode

**Visual Indicators:**

- ▢F▢loating red banner at top of all pages

- Shows viewing user email and admin email

- "⚠ Emails & Tickets Blocked" warning

- Large "Exit Helpdesk Mode" button

**What's Blocked:**

- All outgoing emails (password resets, notifications, etc.)

- All workflow ticket creation

- All contact form submissions

- All API ticket requests

**What Works:**

- Page navigation

- Viewing data

- Testing interface

- Reading information

## Exiting Helpdesk Mode

**Method 1:** Click "Exit Helpdesk Mode" button in red banner (appears on all pages)

**Method 2:** Navigate to: https://pmtnm.org/admin/end_helpdesk_mode.php

**What happens:**

- Session destroyed

- Logged out as user

- Redirected to login with confirmation message

- Exit logged to admin log

## Logging and Security

**All activations logged to:** `logs/admin_helpdesk_mode.log`

**Log Format:**

```
[2026-01-04 10:30:00] HELPDESK MODE ACTIVATED: admin@pmtnm.org viewing user@example.com | Reason: Testing
login issue
[2026-01-04 10:35:00] HELPDESK MODE ENDED: admin@pmtnm.org stopped viewing user@example.com
```

**Blocked attempts also logged:**

```
EmailService: Email blocked - Helpdesk Mode active (admin: admin@pmtnm.org, attempted to: user@example.com)
WorkflowManager: Ticket creation blocked - Helpdesk Mode active (admin: admin@pmtnm.org)
```

**Security Features:**

- All activations logged with admin email + reason

- All blocked actions logged

- Session properly isolated

- Cannot bypass restrictions

- Must acknowledge read-only mode before entry

## When to Use Helpdesk Mode

**Good Use Cases:**

- Troubleshooting user-specific issues

- Testing user experience

- Helping users with account problems

- Verifying user permissions and access

- Investigating reported bugs

**Not Appropriate For:**

- Sending emails on behalf of users (use regular methods)

- Creating tickets for users (they should submit)

- Making account changes (use admin tools)

- Testing email functionality (won't work in helpdesk mode)

## Common Scenarios

**Scenario: User can't log in**

1. Enter helpdesk mode as that user

2. Try to navigate to their profile

3. Check their authentication status

4. Review their permissions

5. Exit helpdesk mode

6. Use admin tools to fix issue

**Scenario: User reports missing data**

1. Enter helpdesk mode as that user

2. Navigate to the page they're viewing

3. See exactly what they see

4. Verify if data exists

5. Exit helpdesk mode

6. Investigate database or permissions

**Scenario: Testing new feature**

1. Enter helpdesk mode as test user

2. Navigate to new feature

3. Test from user perspective

4. Document findings

5. Exit helpdesk mode

6. Make necessary adjustments

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# Technical Reference

## System Architecture

**Core Components**

**1. WorkflowManager (** `includes/WorkflowManager.php` **)**

- Ticket creation and management

- Status transitions

- Data persistence

- Closure request handling

**2. WorkflowRouter (** `includes/WorkflowRouter.php` **)**

- Email routing and notifications

- Token generation and validation

- Notification templates

**3. WorkflowTemplates (** `includes/WorkflowTemplates.php` **)**

- Workflow configuration

- Field validation

- Routing rules

**4. WorkflowDatabase (** `includes/WorkflowDatabase.php` **)**

- Database storage (PostgreSQL)

- Data migration

- Query methods

**User Interface Pages**

- `contact.php` - Request submission form

- `workflow/my_requests.php` - User dashboard

- `workflow/view_ticket.php` - Ticket details and resolution

- `workflow/respond.php` - Recipient action interface

- `workflow/admin/workflow_admin.php` - Admin dashboard

- `workflow/admin/closure_approvals.php` - Workflow manager approvals

**Data Storage**

**Database (PostgreSQL):**

- `workflow_tickets` - Active and historical tickets

- `workflow_events` - Complete audit log

**File System:**

- `data/workflows/closure_documentation/` - Uploaded files

- `logs/admin_helpdesk_mode.log` - Helpdesk mode activity

## Security Features

**Token-Based Access:**

- All action links use secure, time-limited tokens

- Tokens expire after 48 hours

- HMAC-SHA256 cryptographic security

- Action-specific (respond, fulfill, view)

**Access Control:**

- Financial Access Requests require login

- Ticket viewing requires authorization

- Admin features require admin access

- Helpdesk mode blocks destructive actions

**Email Normalization:**

- All email addresses normalized (lowercase, trimmed)

- Prevents issues with case sensitivity

**Data Sanitization:**

- All inputs validated and sanitized

- Protection against injection attacks

- File upload validation (type, size, permissions)

## API Endpoints

**Available Endpoints:**

```
GET  /api/workflow/workflows        - List all workflows
GET  /api/workflow/tickets          - List tickets
GET  /api/workflow/tickets/:id      - Get ticket details
POST /api/workflow/tickets          - Create ticket
POST /api/workflow/tickets/:id/respond        - Respond to ticket
POST /api/workflow/tickets/:id/fulfill        - Mark as fulfilled
POST /api/workflow/tickets/:id/submit_closure - Submit closure request
POST /api/workflow/tickets/:id/approve_closure - Approve closure (admin)
POST /api/workflow/tickets/:id/deny_closure    - Deny closure (admin)
```

**Authentication:** Session-based or token-based

**Documentation:** https://pmtnm.org/api/workflow/help

## Email Notifications

**Notification Types:**

1. **Initial Request** - Sent when ticket created

2. **Response Notification** - Sent when recipient responds

3. **Fulfillment Notification** - Sent when marked fulfilled

4. **Confirmation Reminder** - Reminder to submit closure request

5. **Closure Request** - Sent to workflow manager for approval

6. **Closure Approved** - Sent when closure approved

7. **Closure Denied** - Sent when closure denied

**Email Features:**

- HTML formatted with action buttons

- Secure tokenized links

- Complete request details

- Clear call-to-action

**Development Mode:**

- Emails logged to `logs/localhost_emails/`

- Displayed in browser (not sent)

**Production Mode:**

- Sent via SMTP

- All TO/CC recipients receive copies

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# Frequently Asked Questions

## General Questions

**Q: Can anyone submit a request?**

A: It depends on the request type:

- **Financial Records Access** - Members only (login required)

- **Membership Inquiry** - Anyone

- **Get Involved** - Anyone

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**Q: How do I know if my request was received?**

A: You'll receive:

1. Confirmation message on screen

2. Email with your ticket number

3. Request appears in "My Requests" page

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## Q: What if I don't get a response by the deadline?

A: The system has automatic reminders. If urgent, you can:

- Check status in "My Requests"

- Contact admin@pmtnm.org for assistance

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## Q: Can I update my request after submitting?

A: Not directly, but:

- Recipients can respond with questions

- You can clarify in the closure documentation

- You can submit additional information via email (reference ticket ID)

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## Q: Who can see my requests?

A: Only:

- You (the originator)

- The assigned recipient

- System administrators

- Workflow manager

Requests are **not** publicly visible.

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## Closure Approval Questions

## Q: Why do we need closure approval?

A: To ensure:

- Proper documentation of completion

- Quality control

- Governance compliance

- Complete audit trail

- Accountability

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## Q: What if my closure request is denied?

A:

- Read the denial reason carefully

- Address the specific issues mentioned

- Work with recipient if needed

- Resubmit with improved documentation

- No penalty for resubmission

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## Q: Are files required for closure requests?

A: No, files are optional. However:

- Good documentation is always required

- Files strengthen your request

- Some workflows benefit more from file evidence

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## Q: How long does closure approval take?

A: Goal is 24-48 hours. Workflow manager reviews as promptly as possible.

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## Technical Questions

## Q: I received an "Invalid token" error. What should I do?

A: Tokens expire after 48 hours. If expired:

1. Check email for newer notification

2. Use "Resend Confirmation Request" if available

3. Contact support if problem persists

**Q: Why can't I see my tickets on the home page?**

A: Make sure:

- You're logged in

- Using same email address as submission

- Tickets are matched by email (case-insensitive)

**Q: Can I attach files to my initial request?**

A: Currently no. However:

- You can describe needs in detail

- You can attach files to closure requests

- Recipient can arrange file sharing separately

## Helpdesk Mode Questions

**Q: Why can't I send emails in helpdesk mode?**

A: Helpdesk mode is read-only for safety:

- Prevents accidental emails to users

- Prevents unintended actions

- Ensures troubleshooting doesn't affect user

**Q: How do I know I'm in helpdesk mode?**

A: You'll see:

- Large red banner at top of all pages

- "⬜⬜ HELPDESK MODE ACTIVE" message

- Warning about blocked features

- Exit button always visible

**Q: What if I forget to exit helpdesk mode?**

A:

- Session will eventually timeout

- Banner is always visible as reminder

- All actions are logged for accountability

- Just click "Exit Helpdesk Mode" when ready

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# Getting Help

## System Issues

If you encounter technical problems:

**Contact:** System Administrator

**Email:** wgmilleriii@gmail.com

**Or:** Submit "Membership Inquiry" workflow request

## Request Status Questions

If you have questions about a specific request:

**Actions:**

- View ticket in "My Requests"

- Check message thread for updates

- Contact assigned recipient directly if urgent

- Reference your ticket ID in all communications

## Workflow Manager Questions

If you're a workflow manager with questions:

**Contact:** Board President or System Administrator

**Technical Issues:** admin@pmtnm.org

**Policy Questions:** Refer to PMTNM Handbook

## Feedback and Suggestions

Have ideas for improving this system?

**Submit via:** "Get Involved - Volunteer Interest" workflow

**Mention:** It's about the workflow system

**Describe:** What you'd like to see improved

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# Quick Reference

## URLs

- **Submit Request:** https://pmtnm.org/contact.php

- **My Requests:** https://pmtnm.org/workflow/my_requests.php

- **Admin Dashboard:** https://pmtnm.org/workflow/admin/workflow_admin.php

- **Closure Approvals:** https://pmtnm.org/workflow/admin/closure_approvals.php

- **Helpdesk Mode:** https://pmtnm.org/admin/user_management/helpdesk_mode.php

- **API Documentation:** https://pmtnm.org/api/workflow/help

## Response Deadlines

- Financial Records: **14 days**

- Membership Inquiry: **7 days** (fastest)

- Volunteer Interest: **14 days**

## File Upload Limits

- **Per File:** 10MB maximum

- **Per Closure:** 5 files maximum

- **Per Ticket:** 50MB total

- **Allowed Types:** PDF, JPG, PNG, DOC, DOCX

## Status Indicators

- **Pending Response** - Awaiting recipient action

- **Responded** - Recipient sent message

- **Fulfilled** - Marked complete, needs closure request

- **Closure Pending** - Workflow manager reviewing

- **Resolved** - Closed and complete

- ☐ **Unresolved** - Not satisfied, needs additional work

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# Document Information

**Title:** PMTNM Helpdesk & Workflow System - Complete Guide

**Version:** 2.0

**Last Updated:** January 4, 2026

**Maintained By:** PMTNM Technical Team

**For Questions:** Contact System Administrator (wgmilleriii@gmail.com)

## Document History

- **v1.0** (January 2025) - Initial workflow system implementation
- **v2.0** (January 2026) - Added closure approval process, helpdesk mode documentation, comprehensive guide

## Related Documentation

- `WORKFLOW_USER_GUIDE.md` - Original user guide
- `WORKFLOW_MANAGER_GUIDE.md` - Workflow manager role guide
- `WORKFLOW_DESIGN_PHILOSOPHY.md` - System design rationale
- `WORKFLOW_COMPARISON.md` - Workflow comparison guide
- `workflow-system-documentation.md` - Technical documentation
- `HELPDESK_MODE_SUMMARY.md` - Helpdesk mode quick reference

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**Thank you for using the PMTNM Helpdesk & Workflow System!**

*This system ensures every member request receives the attention, tracking, and quality it deserves.*