Novell Helpdesk Administration Guide

1 Getting Started

1.1 Overview

Helpdesk provides an on-line resource for administrators to monitor incidents, check the status incident tickets, allocate work, and personalize settings to best fit their company's needs. This allows Helpdesk users the reassurance that their incidents have been received by support teams.

1.2 Requirements

When you choose to install the Helpdesk component on your NOWS server these requirements will be automatically included in the installation. With the exception that the eDirectory and iManager compents will need to be installed prior to the Helpdesk component.

Server Requirements (based on OES requirements)

Server Requirements (based on OES requirements)

Insert table.

Desktop Operating System and Browser Requirements

Insert table.

1.3 Installation

Once you have installed your NOWS server operating system and the base component, eDirectory you can install the Helpdesk application from the NOWS Admin GUI.

1. Login to the NOWS Admin GUI with the sbsadmin login name and password.
2. Click on the *Add/Remove* link.
3. Locate the Helpdesk application from the list of components to install.
4. Clic\k the *Install* button.
5. Choose to install the Basic or Advanced option.
   - Basic: Minimal configuration required by the administrator. Default settings installed.
   - Advanced: Options available to change configurations such as ports, logging levels, etc.

1.3.1 Basic Installation

The Basic installation is a five step process which configures your Helpdesk application with the default recommended settings.

1. Choose the Basic option on the Installation Type page2.Enter in the settings for your LDAP services. LDAP is used for user authentication and authorization. Once you have entered the information click Next to continue your Helpdesk installation.
2. Enter in the settings for your LDAP services. LDAP is used for user authentication and authorization. Once you have entered the information click *Next* to continue your Helpdesk installation.

   helpdesk basic 2. LDAP

   - LDAP Host: Enter the IPAddress for your eDirectory server. In most cases this will be the same as that server on which you are installing Helpdesk
   - LDAP Port: The default port for LDAP services is 389. However this is an unsecure port and all authentication should use a secure connection. Please change this to port number 636 which is for LDAP over SSL.
   - LDAP SSL: The default is set at 0 because over port 389, LDAP is unsecure. If you have chosen to LDAP over SSL and changed the port to 636, then enter a 1 here to enable SSL.
   - LDAP Bind DN: This is the full distinguished name for the proxy user that will be used for your LDAP services. The proper format is to use commas and not periods to separate the loginID and it's context information.
   - LDAP Base Organization: This is the base context your Helpdesk application will look to authenticate users. Typically it is the o of the eDirectory tree.
   - LDAP Password: This is the password that will be used by the LDAP proxy user.
   - Helpdesk Object: This is the eDirectory Helpdesk object's full distinguished name.
   - Admin FDN: This is the full distinguished name of the eDirectory tree's admin user.
   - Admin User Password: This is the password you use for your eDirectory tree's admin user.

3. Enter the settings for your Helpdesk environment. Once you have entered the information click *Next* to continue your installation.

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   - Admin User Password: This is the password you use for your eDirectory tree's admin user.
   - MySQL User: This is the user that will be used to manage the database. It will need full privileges.
4. Enter the settings for your Helpdesk environment. Once you have entered the information click *Next* to continue your installation.
   - Helpdesk Administrator User Name: This is the loginID for the default administrator of your Helpdesk application.
   - Password for Helpdesk Admin: This is the password to which the default administrator login is linked.
   - Helpdesk tree: Name of your eDirectory tree

- Helpdesk Download Path: This is the path from which all Helpdesk downloads occur. Please keep at the default to ensure you receive updates from Novell appropriately.
- Helpdesk Upload Path: This is the path from which all Helpdesk uploads occur. Please keep at the default to ensure you receive updates from Novell appropriately.
- Helpdesk Title: The name you would like your employees to see when they log into your Helpdesk application.
- Helpdesk Admin E-Mail: The address that will be used when users submit tickets and from which responses from Helpdesk are addressed. An example of this email address would be: *support@yourdomainname.com*
- Helpdesk Database User Name: The name of the user on your database server that will have full access to this dadbase instance. This can be the same The password to which the Database User Name is linked.
- Helpdesk Database Password: The password to which the Database User Name is linked.
- Helpdesk Mail Password: The password used to log into the Helpdesk support email account.
- Helpdesk Mail User Name: The login name of the Helpdesk support email account.

5. Review the settings you have chosen. If all is correct click *Next* to complete your Helpdesk installation.
6. Once the installation has completed click the *Finish* button.

1.3.2 Advanced Installation

The Advanced installation allows you to configure your Helpdesk application with settings unique to your environment and procedures.

1. Choose the *Advanced* option on the *Installation Type* page.
2. Enter in the settings for your LDAP services. LDAP is used for user authentication and security. Once you have entered the information click *Next* to continue your Helpdesk installation.
    - LDAP Host: Enter the IPAddress for your eDirectory server. In most cases this will be the same as that server on which you are installing Helpdesk.
    - LDAP Port: The default port for LDAP services is 389. However this is an unsecure port and all authentication should use a secure connection. Please change this to port number 636 which is for LDAP over SSL.
    - LDAP SSL: The default is set at *0* because over port 389, LDAP is unsecure. If you have chosen to LDAP over SSL and changed the port to 636, then enter a *1* here to enable SSL.
    - LDAP Bind DN: This is the full distinguished name for the proxy user that will be used for your LDAP services. The proper format is to use commas and not periods to separate the loginID and it's context information.
    - LDAP Base Organization: This is the base context your Helpdesk application will look to authenticate users. Typically it is the *o* of the eDirectory tree.

- LDAP Password: This is the password that will be used by the LDAP proxy user.
- Helpdesk Object: This is the eDirectory Helpdesk object's full distinguished name.
- Admin FDN: This is the full distinguished name of the eDirectory tree's admin user.
- Admin User Password: This is the password you use for your eDirectory tree's admin user.

3. Enter the settings for your database instance. Once you have entered the information click *Next* to continue your installation.
    - MySQL User: This is the user that will be used to manage the database. It will need full privileges.
    - MySQL User Password: This is the password to which the MySLQ User is linked.
4. Enter the settings for your Helpdesk environment. Once you have entered the information click *Next* to continue your installation.
    - Helpdesk Administrator User Name: This is the loginID for the default administrator of your Helpdesk application.
    - Password for Helpdesk Admin: This is the password to which the default administrator login is linked.
    - Helpdesk tree: Name of your eDirectory tree
    - Helpdesk Download Path: This is the path from which all Helpdesk downloads occur. Please keep at the default to ensure you receive updates from Novell appropriately.
    - Helpdesk Upload Path: This is the path from which all Helpdesk uploads occur. Please keep at the default to ensure you receive updates from Novell appropriately.
    - Helpdesk Title: The name you would like your employees to see when they log into your Helpdesk application.
    - Helpdesk Admin E-Mail: The address that will be used when users submit tickets and from which responses from Helpdesk are addressed. An example of this email address would be: *support@yourdomainname.com*
    - Helpdesk Database User Name: The name of the user on your database server that will have full access to this database instance. This can be the same user name as used for the MySQL User.
    - Helpdesk Database Password: The password to which the Database User Name is linked.
    - Helpdesk Mail Password: The password used to log into the Helpdesk support email account.
    - Helpdesk Mail User Name: The login name of the Helpdesk support email account.

5. Enter the Advanced Helpdesk configurations as you see fit. Once you are satisfied with the changes click *Next* to enter additional Advanced information.
    - Helpdesk Send User Queue Change: Keep at *0* to not notify users of a change in their queue association. Change to *1* to turn on notification.
    - Helpdesk Send User Priority Change: Keep at *0* to not notify users of a change in the priority of their incident. Change to *1* to turn on notification.
    - Helpdesk Send User Tech Change: Change to *0* to not notify users of a change to the technician assigned to their incident. Keep at *1* to activate notification
    - Helpdesk Send User Status Change: Change to *0* to not notify users of a change in their incident's status. Keep at *1* to activate notification.
    - Helpdesk Send User Close: Change to *0* to not notify users of a change in their incident's status to *Close*. Keep at *1* to activate notification.
    - Helpdesk Web Helpdesk Page: This is the address your Helpdesk users will go to access your Helpdesk services.
    - E-mail address of queue changes: Enter the email address that will be used to send notifications of reassignments of queues.

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    - Helpdesk Technician Change E-Mail: Enter the email address that will be used to send notifications of reassignments of technicians.
    - Helpdesk Solution Change E-Mail: Enter the email address that will be used to send notifications of incident solutions.
    - Helpdesk Status Change E-Mail: Enter the email address that will be used to send notifications of change to incident status.
    - Helpdesk Priority Change E-Mail: Enter the email address that will be used to send notifications of change to incident priority.
    - Helpdesk Default Technician: Enter the default technician name for unassigned Helpdesk incidents.
    - Helpdesk Technician Change E-Mail: Enter the email address that will be used to send notifications of reassignments of technicians
    - Helpdesk Auto Assign: Keep at *0* to not automatically assign incidents. Change to *1* to enable this feature.
    - Helpdesk Allow Technician Assign: Keep at *0* to not allow technicians to assign incidents. Change to *1* to enable this feature.
    - Helpdesk Check Sleep Time: This is the interval the system polls for incidents submitted by email. (interval in seconds)
    - Helpdesk Ticket Sleep Time: This is the interval the system polls for new incidents submitted through the Helpdesk interface. (interval in seconds)
6. Enter the Advanced Helpdesk configurations as you see fit. Once you are satisfied with the changes click *Next* to complete your Advanced installation of the Helpdesk component.
    - Helpdesk Log Location: Directory location on server for log files
    - Helpdesk Log Level: *FINE, NORMAL, VERBOSE*. FINE is default.

- Helpdesk Report Closure: Keep at *0* to not report on closed reports. Change to *1* to activate notification.
- Helpdesk Mail Digest: Keep at *0* to not send out a report of all incidents daily. Change to *1* to activate this notification.
- Helpdesk Send Notifications: Keep at *1* to send out notifications. Change to *0* to deactivate this notification.
- Helpdesk Mail Password: This is the password used to log into the designated helpdesk mail account.
- Helpdesk Mail User Name: This is the user name of the designated helpdesk mail account.
- Helpdesk Return Address: This is the email address used by the helpdesk for responding to user inquiries.
- Helpdesk Mail Provider: This is the type of mail service used by your company.
- Helpdesk Incoming Mail Port: This is the port that the server is listening for incoming mail.
- Helpdesk Incoming Mail Server: This is the address of your mail server.
- Helpdesk Outgoing Mail Server: This is the address of your mail server.
- Helpdesk Database Port: This is the port the database uses.
- Helpdesk Database Password: This is the password of the database admin account.
- Helpdesk Database User Name: This is the login name of the database admin account.
- Helpdesk Use SSL: Keep at *0* if you will not be using SSL. Change to *1* if you have chosen to enable security.

7. Review the settings you have chosen. If all is correct click *Next* to complete your Helpdesk installation.
8. Once the installation has completed click the *Finish* button.

1.3.3 Uninstalling Helpdesk

The Advanced installation allows you to configure your Helpdesk application with settings unique to your environment and procedures.

1. Log into your NOWS server administration GUI with the sbsadmin login and password.
2. Click on the *Add/Remove* link and locate the Helpdesk component from the list of installed components.
3. Click on the *Uninstall* button. Confirm that you would like to uninstall the component from your NOWS server by clicking the *Uninstall* button.
4. If you do not plan to reinstall the Helpdesk application, you can clean up your user accounts by deleting the role information from the *employeetype* field in eDirectory.

Administration

2.1 Roles and Designated Access

There are four types of access that may be granted in the Helpdesk application. Depending on which role is assigned dictates what a user will be able to view. The four role types are:

- Helpdesk User: This role allows users to submit incidents and track them through completion.
- Technician: This role is for system engineers and technicians. People assigned to this role can submit incidents, track incidents assigned to them and to their designated queue as well as consult the knowledge base for soulutions to previously diagnosed incidents.
- Reporter: This role is for technician’s managerial staff. This enables the managers to report on the efficiency of their technical staff.
- Administrator: This role is for the network administrator to set up new users, new queues, and modify system configurations as needed.

NOTE: You can assign combinations of the roles above to grant the access your staff needs. For example, you can grant an administrator the *Administrator* role and the *Reporter* role so they can add users and track their technical staff's efficiency.

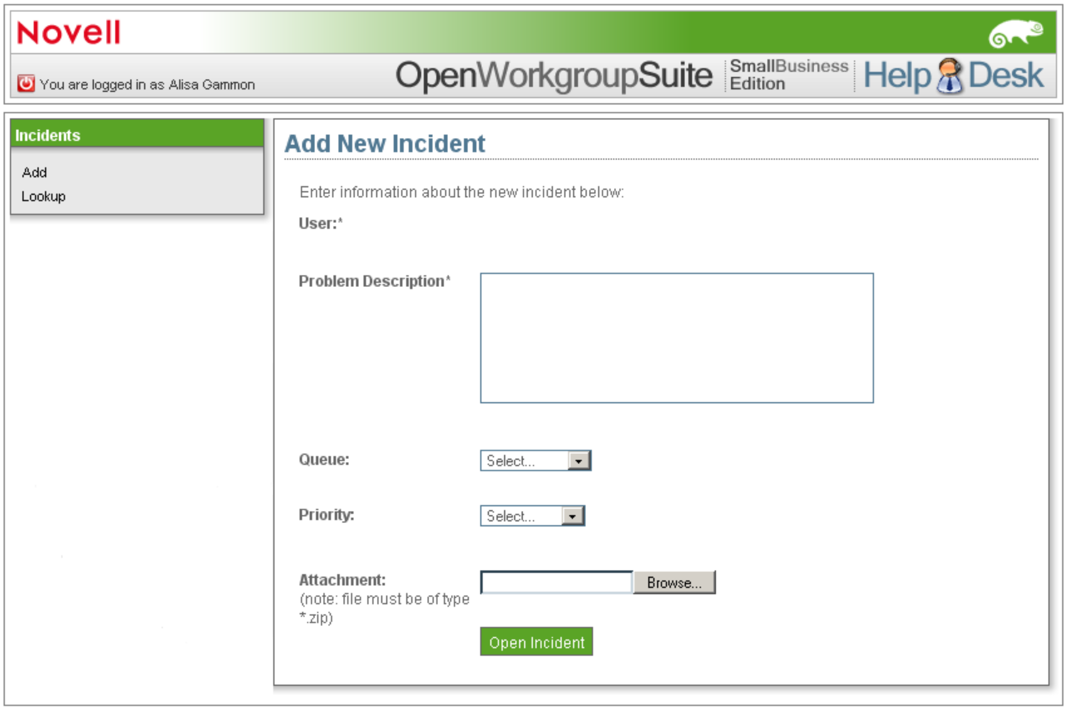
2.1.1 Helpdesk User

Helpdesk provides an on-line resource for employees to report problems and to check the status of their submitted incident tickets. This allows Helpdesk users the reassurance that their incidents have been received by support teams.

Designated Access

A Helpdesk user has the most basic access in Helpdesk application. A user only has access to the *Incident* menu panel. From this panel they have access to *Add* or *Lookup* a Helpdesk ticket. Once logged in the Helpdesk user is directed to the *Add* incident page.

Figure 2-1 *User Add New Incident*



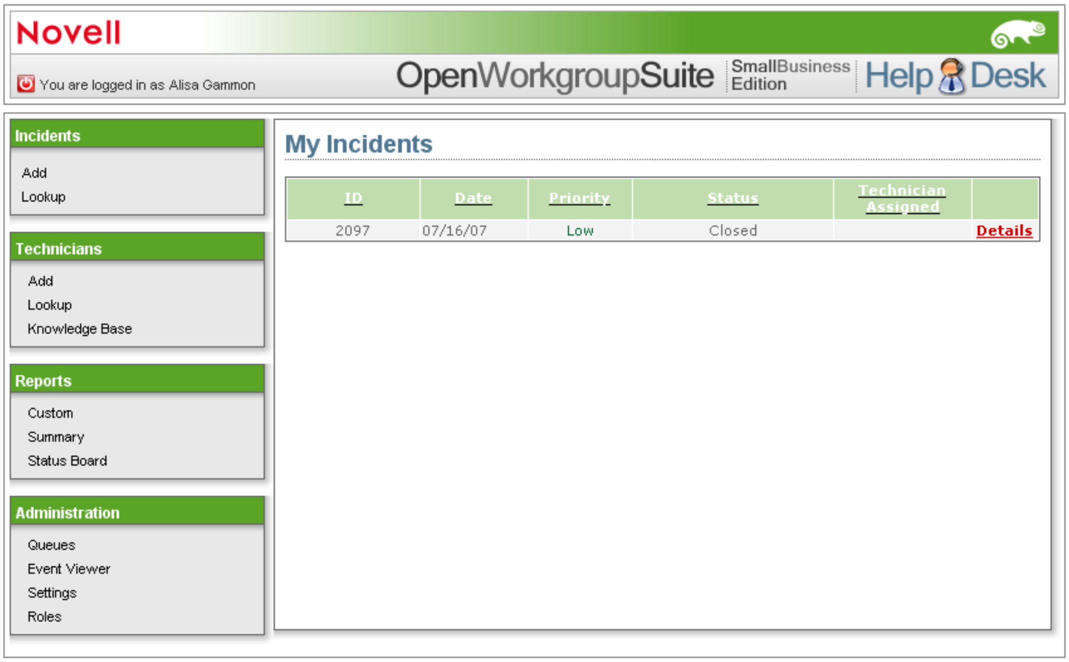
Directions for a User Submitting a Helpdesk Ticket

1. First click *Add*. In the *Problem* field enter a description of your error. Be sure to write a detailed and accurate description of the problem. This will allow for a speedier solution to be provided.
2. In the *Queue* field select the appropriate category for your problem.
   - General: Miscellaneous problems.
   - Network: Port connectivity issues.
   - Server: Problems pertaining to account setup on server.
   - Workstation: Problems pertaining to your issued laptop or desktop.
3. In the *Priority* field select the appropriate rank for your problem.
   - Fatal: Lost capability to critical systems.
   - Critical: Lost capability to non-critical systems.
   - Urgent: Important conflict not pertaining to work.
   - High: Concerns relating to items needed for productivity.
   - Medium: Concerns relating to access needed.
   - Low: Nice to have, but not needed to accomplish tasks.
   - Informational: Communicational. For example: Account deactivation.
4. In the *Attachment* field click *Browse* to insert an appropriate attachment. For example: Logfiles, screenshots, etc.
5. Click *Open Incident* to submit incident ticket.

Directions For a User to Search for a Helpdesk Ticket

1. Click *Lookup* to check on a submitted incident ticket.
2. Once on the Helpdesk ticket search page, you may sort the tickets by clicking the following headings: ID, Date, Priority, Status, or Technician Assigned.

Figure 2-2 *User Lookup*



2.1.2 Technician Role

To have access to the Technicians menu panel you must be a helpdesk technician or administrator. The Technicians panel is where you have access to add helpdesk tickets and visit existing and competed helpdesk tickets assigned to you. The *Technician Add* field allows you to enter the username for whom you are submitting the helpdesk ticket for.

Designated Access

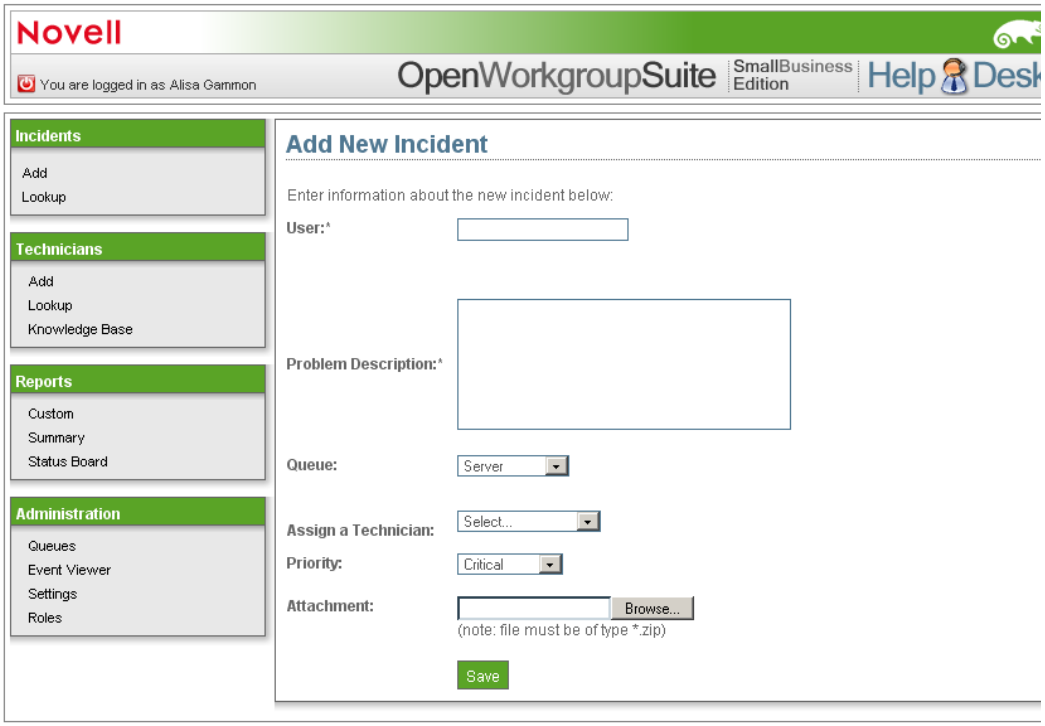
A Helpdesk Technician is granted the basic Helpdesk access along with added access of the Technicians panel. Therefore they will view both the *Incidents* panel and *Technicians* panel when they log into Helpdesk.

The *Knowledge Base* is where Technicians have access to search all helpdesk tickets by the incident description, queue, and date. This enables technicians to search for solutions to similar problems. This is an invaluable time saving feature for IT staff.

Technician Add New Incident Directions

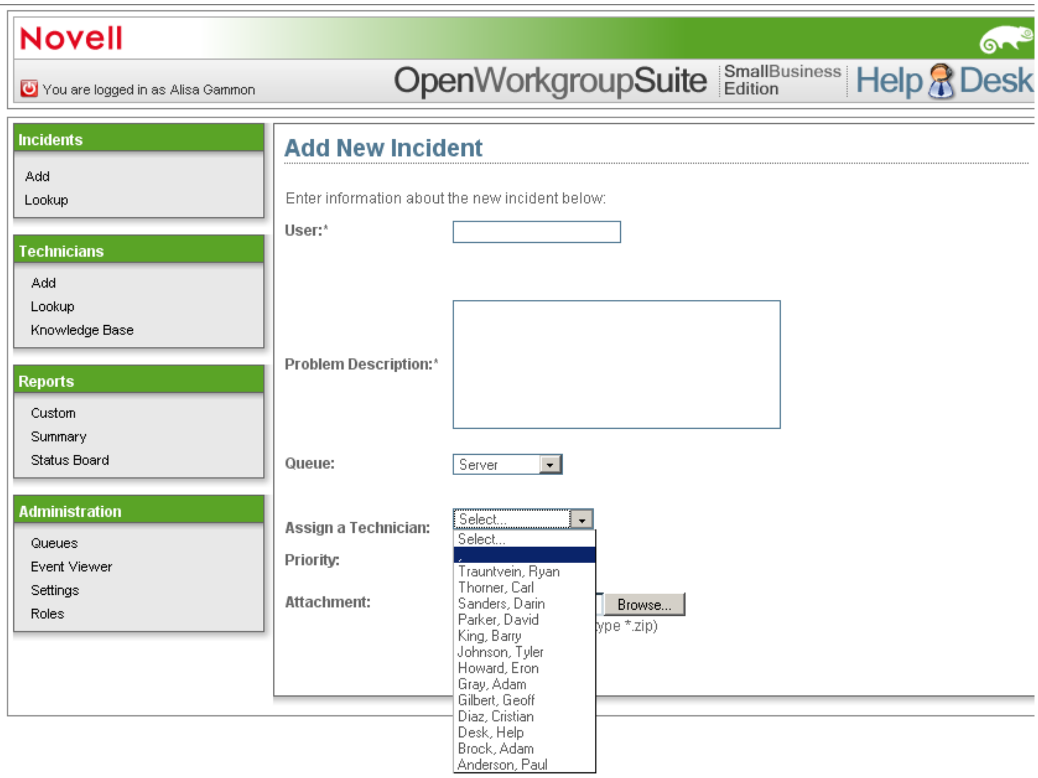
1. Click *Add* under the Technician section. In the User field enter the user's name, this will be associated with the incident ticket.

Figure 2-3 Technician Add New Incident



2. In the *Problem* field enter a description of your error and your solution. Be sure to write a detailed and accurate description so that technicians by resource your solution in the future.
3. In the *Queue* field select the appropriate category for the problem. See User's section for specifications for appropriate queue levels.
4. In the Assign a Technician field you may enter a technician's name to allocate the incident.
5. Select the fitting Priority field. See User's section for specifications on appropriate priority levels. In the *Attachment* field click *Browse* to insert an applicable attachment. For example: Logfiles, screenshots, etc.
6. Click *Open Incident* to submit incident ticket.

Figure 2-4 Assign a Technician Scroll Down



Technician Directions for Lookup Page

1. Click *Lookup* to check on a submitted incident ticket.Once on the helpdesk ticket search page, you may change the order of the helpdesk tickets by clicking the following headings: *Id*, *Date*, *Priority*, *Status*, or *Technician Assigned*.
2. To access all submitted helpdesk tickets, click *Show All.*

Technician Directions for Knowledge Base

1. Click *Knowledge Base.* Once on the Knowledge Base helpdesk ticket search page you must enter a keyword or keywords for the description of the desired incident.
2. You may further narrow down your search by selecting the Queue level that corresponds with the desired helpdesk ticket.
3. The Date Range scroll down menu allows you to narrow down your search by selecting the time frame within the desired helpdesk ticket was submitted.

2.1.3 Reporter Role

To have access to the Reports menu panel a user must be assigned the Reporter or Administrator role. The Reporter panel section is where they have access to create and run custom reports of the incidents and status of active and closed incidents, review the status of active tickets, as well as a overall status of submitted incidents. This access is beneficial for IT managerial staff for reporting to management the efficiecy of their department.

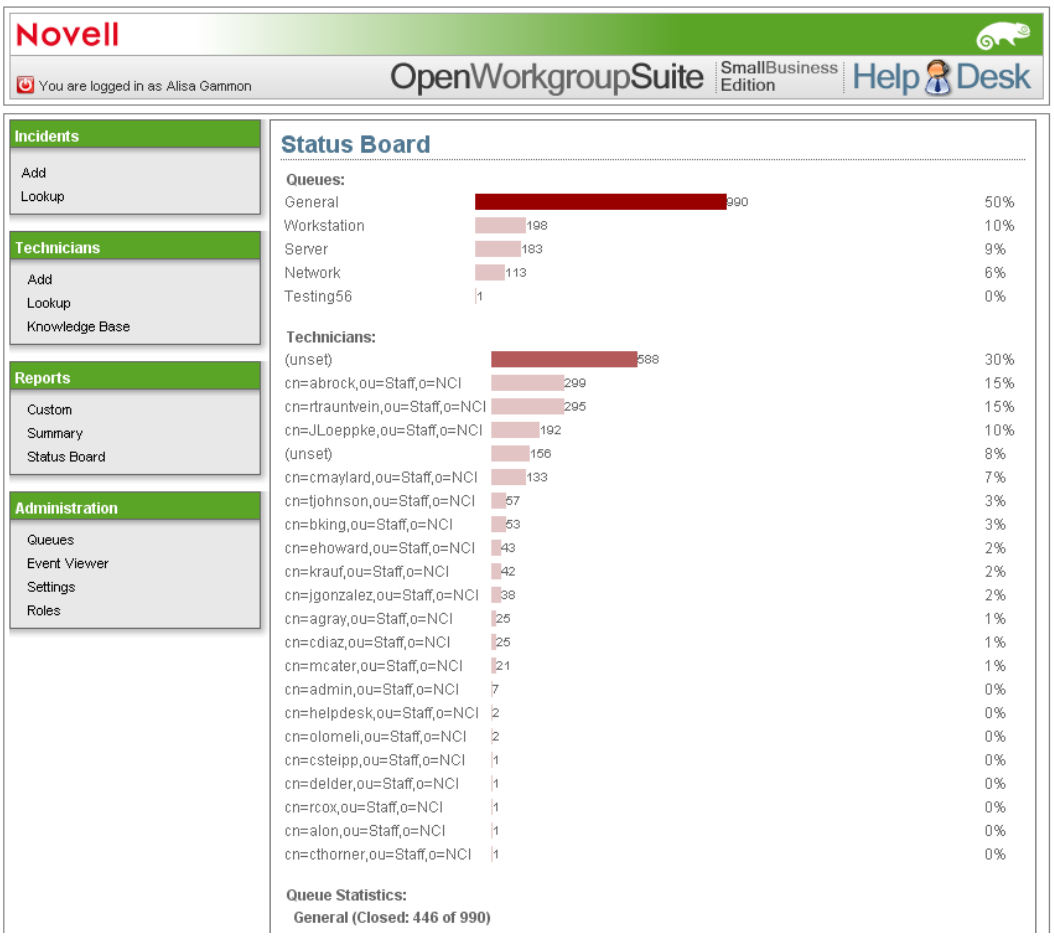
Designated Access

A Reporter has access to the Incident and Reporter menu panels. The is a valuable tool to view how your business' team members are preforming. The Reporter can view the following statistics:

The *Knowledge Base* is where Technicians have access to search all helpdesk tickets by the incident description, queue, and date. This enables technicians to search for solutions to similar problems. This is an invaluable time saving feature for IT staff.

- Percentages of helpdesk ticket assigned to queues.
- Percentages of helpdesk tickets assigned to technicians.
- Average time it takes to close helpdesk tickets from different queues.
- Average time it takes technicians to close a helpdesk ticket.

Figure 2-5 *Helpdesk Status Board*



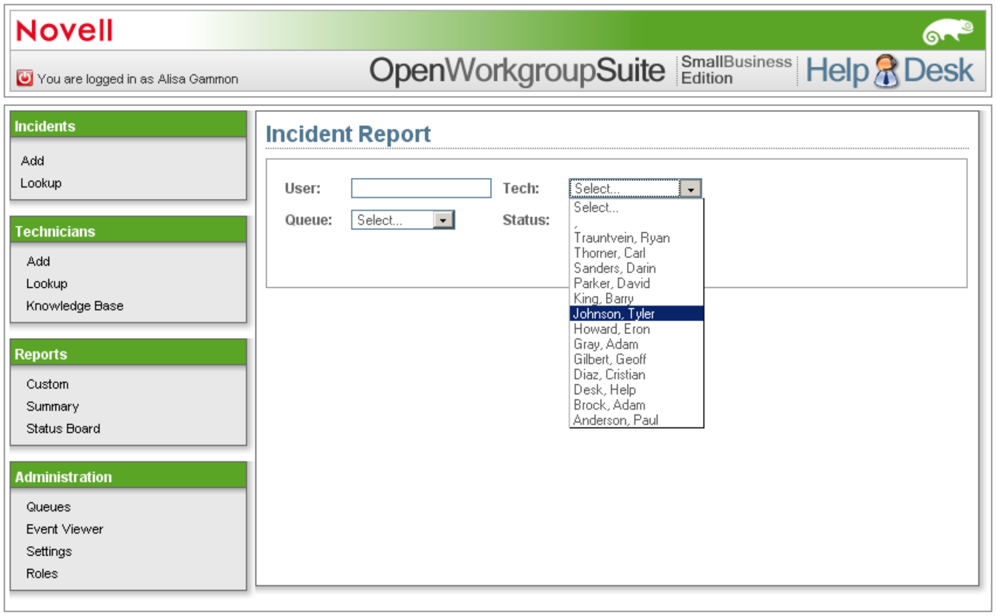
How to Customize a Search

In the Custom section you have access to search by user, tech assigned to helpdesk ticket, queue level, and status of helpdesk ticket.

1. In the User field you may enter the username of whom the desired helpdesk ticket was submitted by.

2. In Queue drop down menu you may specify the queue level of the desired helpdesk ticket.
3. In the Tech field you may enter the name of the assigned helpdesk technician. As you enter the name of a technician. As you type, a drop down field will populate. Click *Add* to select the appropriate technician.

Figure 2-6 *Reporter Custom Setting*



4. In the Status field, you may narrow your search by selecting the appropriate activity level of the desired helpdesk ticket.

2.1.4 Administrator Role

To have access to the Adminsistrator menu panel a user must be assigned the *Administrator* role. The Adminsistrator panel is where you have access and create queues, settings, and assign roles (if you choose not to do so directly in eDirectory). As an Administrator you have access to all other sections on Helpdesk.

Desinated Access

A Helpdesk Administrator has all the access of other menu panels along with additonal Administrator panel. The *Event Viewer*s enables the Administrator quick access to view all tickets submitted in Helpdesk regardless of the status.

Queues

Queues are divisions of tasks and can custimized to fit your business needs. Typically queues are set up and named for the teams which the tickets will be assigned. For example:

- Workstations: The queue for the team assigned to dealing with desktops.
- Servers: The queue for the team assigned to handle servers.
- Network: The team assigned to the health of the network.

Your Helpdesk application can be used outside of IT staff as well. You can create queues by department so that employees can submit requests and questions in one central location regardless of the destination of the request. For example:

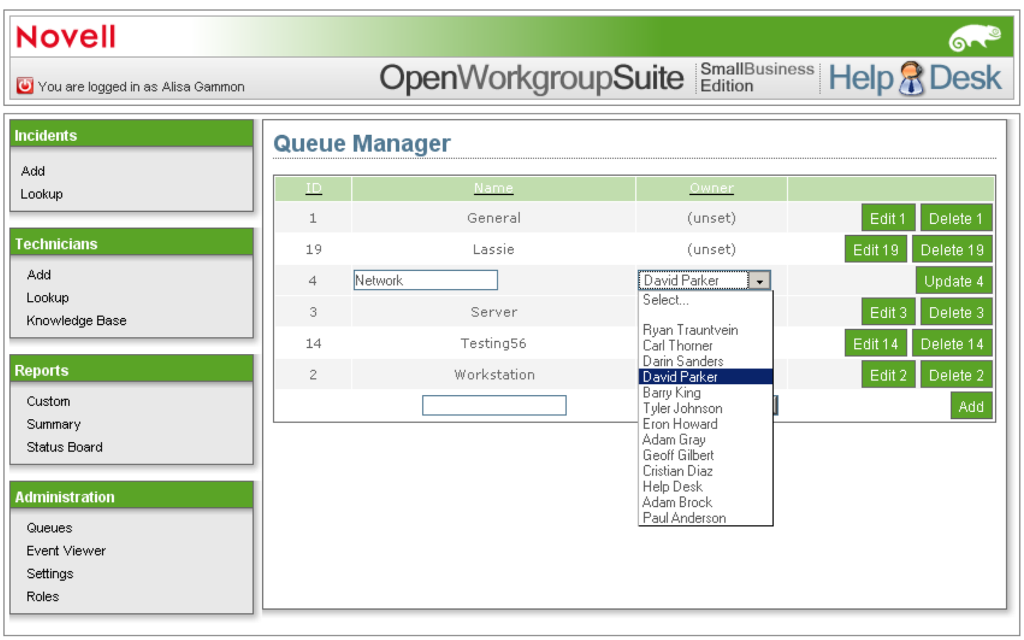
- Sales and Marketing
- Human Resources
- IT Department

You can mix and match configurations to find what works best for your business. What ever configuration works for you and your staff, using this Helpdesk component will assist you in getting questions and concerns to the right personnel and getting responses in a timely fashion.

Creating and Assigning Queues

1. Go to your Helpdesk link and log in as an administrator.
2. Click the link labled *Queues* from the *Administrator* menu panel.
3. Click *Edit* on an new or exisiting queue. Enter the name, delete and any existing name and type in new name. To complete the queue name alteration. Click Update.
4. Enter the name you have chosen for your queue, then click *Update.*
5. To desinate a technician to a queue, click on *Edit*.
6. Next, under the *Owner* column, scroll down until you find the name of the desired technician and then click *Update.*

7.*Aminstrator Queue*

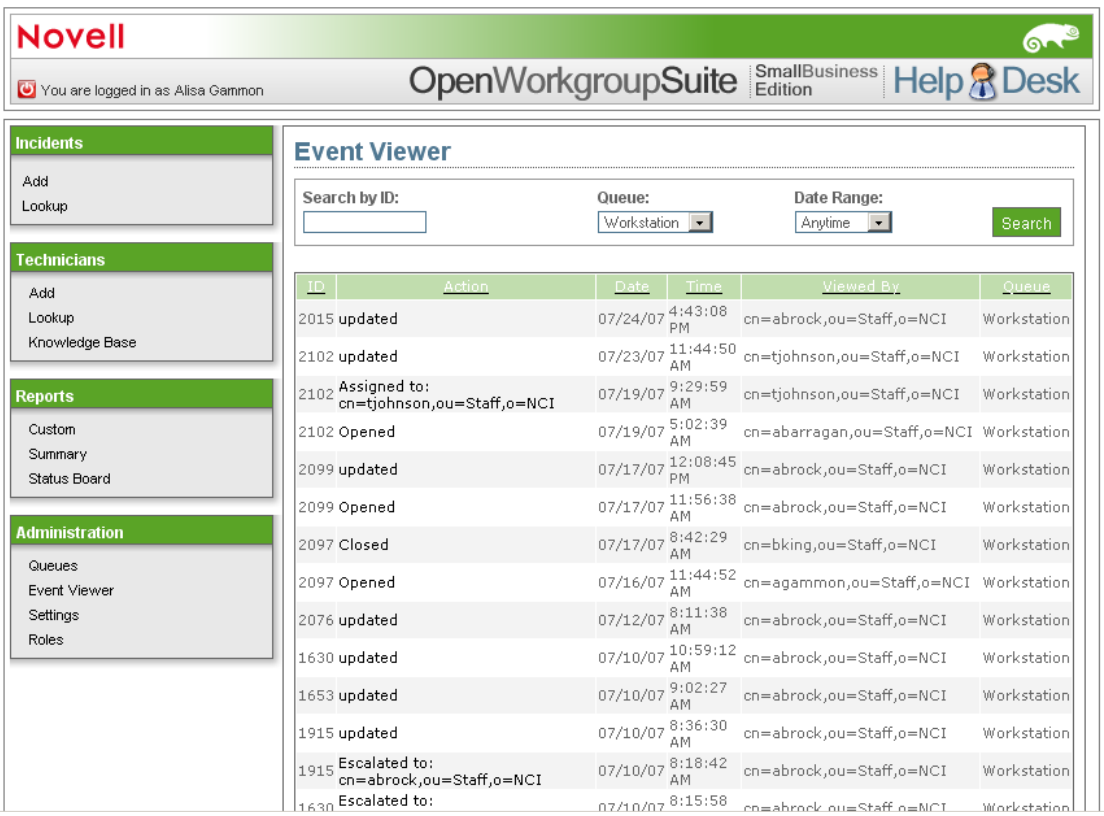


Event Viewer

Event Viewer allows for quick access to view all open, closed, or unverified queues. This is the most free ranging queue management search available on helpdesk.

1. If identification number of desired ticket is known if can be entered into the ID feild, then click *Search*.
2. You may also search by queue or incident date. Click on the respective scroll down menus and select the desired search item, then click *Search*.

Figure 2-7 *Administrator Event Viewerr*



Settings

This database is pre-populated with eDirectory. If there are specific changes which you would like to make in your Helpdesk settings it is possible to make all available changes here. As an Administrator it is important to note the following setting items:

- Data Password
- Email address where changes sent
- Default Global Technician
- Incoming Mail Server

At the bottem of the Settings page you may specify if you would like notifications send with a 1 for yes, or 0 for no.

Figure 2-8 *Helpdesk Settings*

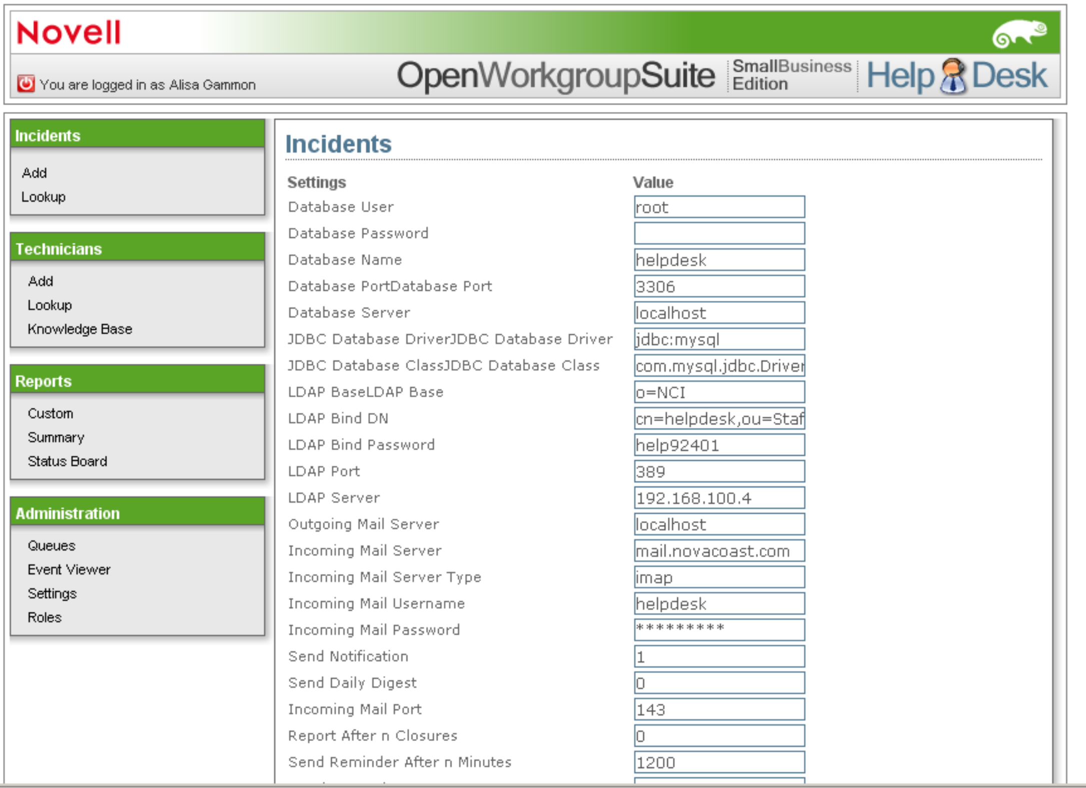
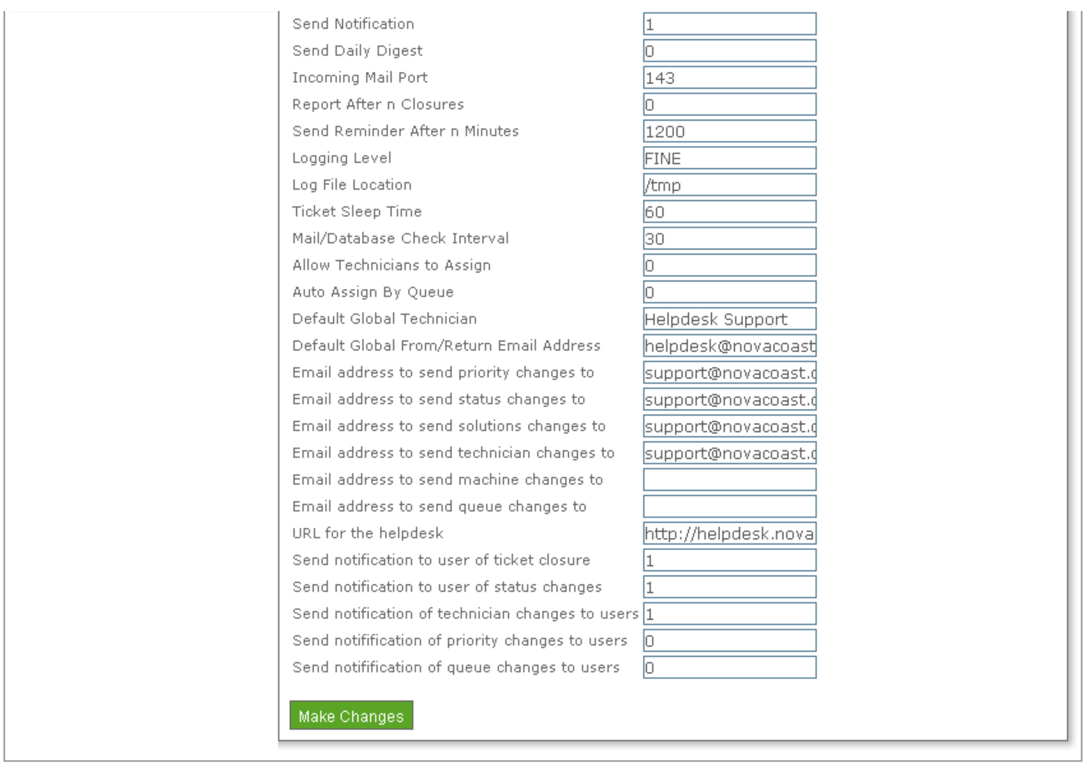


Figure 2-9 *Helpdesk settings continued*



Roles

This is where Administrators can change the roles of users. You can assign combinations of the roles above to grant the appropriate access for your staff. For example, you can grant an administrator the Administor role and the Reporter role so they can ass users and track their technical staff's efficiency.

1. You must first login. Enter your helpdesk username and password in the feilds provided, then press the Enter button on your keyboard.
2. Next enter the full name of the helpdesk user into the Technician, Reporter, or Administraor fields.
3. To complete click Add, to the right of the persepective feild.

Figure 2-10 *Setting User Roles*