

Administration Guide

Novell® Open Workgroup Suite Small Business Edition Helpdesk

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About This Guide

Helpdesk provides an online 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.

- ♦ Chapter 1, "Getting Started," on page 7
- ♦ Chapter 2, "Administration," on page 13

Audience

This guide is intended for Helpdesk administrators.

Feedback

We want to hear your comments and suggestions about this manual and the other documentation included with this product. Please use the User Comments feature at the bottom of each page of the online documentation, or go to www.novell.com/documentation/feedback.html and enter your comments there.

Documentation Updates

For the most recent version of the *Helpdesk Administration Guide* and additional documentation, visit the [Novell Open Workgroup Suite Small Business Edition Web site \(http://www.novell.com/documentation/nows_sbe_25\)](http://www.novell.com/documentation/nows_sbe_25).

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In Novell documentation, a greater-than symbol (>) is used to separate actions within a step and items in a cross-reference path.

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- ♦ Section 1.1, “Overview,” on page 7
- ♦ Section 1.2, “Requirements,” on page 7
- ♦ Section 1.3, “Installation,” on page 7

1.1 Overview

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

1.2 Requirements

When you choose to install the Helpdesk component on your NOWS SBE server, all requirements necessary to run Helpdesk are included in the installation. However, the eDirectory™ and iManager components need to be installed prior to the Helpdesk component.

1.3 Installation

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

- 1 Log in to the NOWSBE Admin GUI with the sbsadmin login name and password.
- 2 Click the *Add/Remove* link.
- 3 Locate the Helpdesk application in the list of components to install.
- 4 Click the *Install* button.
- 5 Choose to install the Basic or Advanced option.
 - ♦ **Basic:** Minimal configuration required by the administrator. Default settings are used.
 - ♦ **Advanced:** Options available to change configurations such as ports and logging levels.

1.3.1 Basic Installation

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

- 1 Select the Basic option on the Installation Type page 2. Specify the settings for your LDAP services. (LDAP is used for the user authentication and authorization.)
- 2 After you have provided the information, click *Next* to continue your Helpdesk installation.
- 3 Specify the settings for your LDAP services.
 - ♦ **LDAP Host:** Specify the IP address for your eDirectory server. In most cases this is the same as the server which you are installing Helpdesk

- ♦ **LDAP Port:** The default port for LDAP services is 389. However, this is a non-secure port and all authentication should use a secure connection. Change this to port number 636, which is for LDAP over SSL.
 - ♦ **LDAP SSL:** The default is set at 0 because LDAP is not secure over port 389. If you have chosen to use LDAP over SSL and changed the port to 636, then specify a 1 here to enable SSL.
 - ♦ **LDAP Bind DN:** The fully distinguished name for the proxy user to be used for your LDAP services. The proper format is to use commas and not periods to separate the login ID and its context information.
 - ♦ **LDAP Base Organization:** The base context your Helpdesk application uses to authenticate users. Typically it is the top of the eDirectory tree.
 - ♦ **LDAP Password:** The password to be used by the LDAP proxy user.
 - ♦ **Helpdesk Object:** The eDirectory Helpdesk object's fully distinguished name.
 - ♦ **Admin FDN:** The fully distinguished name of the eDirectory tree's admin user.
 - ♦ **Admin User Password:** The password you use for your eDirectory tree's admin user.
- 4 Click *Next* to continue your Helpdesk installation.
- 5 Specify the settings for your Helpdesk environment.
- ♦ **Admin User Password:** The password you use for your eDirectory tree's admin user.
 - ♦ **MySQL User:** The user that will manage the database. It needs full privileges.
- 6 Click *Next* to continue your Helpdesk installation.
- 7 Specify the settings for your Helpdesk environment.
- ♦ **Helpdesk Administrator User Name:** The login ID for the default administrator of your Helpdesk application.
 - ♦ **Password for Helpdesk Admin:** The password to which the default administrator login is linked.
 - ♦ **Helpdesk Tree:** Name of your eDirectory tree.
 - ♦ **Helpdesk Download Path:** The path from which all Helpdesk downloads occur. Keep the default to that ensure you receive updates from Novell.
 - ♦ **Helpdesk Upload Path:** The path from which all Helpdesk uploads occur. Keep the default to ensure that you receive updates from Novell.
 - ♦ **Helpdesk Title:** The name you want your employees to see when they log in to your Helpdesk application.
 - ♦ **Helpdesk Admin E-Mail:** The address to be used when users submit tickets and from which responses from Helpdesk are addressed. An example of this e-mail 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.
 - ♦ **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 e-mail account.
 - ♦ **Helpdesk Mail User Name:** The login name of the Helpdesk support e-mail account.

- 8 Review the settings you have chosen. If they are correct, click *Next* to complete your Helpdesk installation.
- 9 After 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 Select the *Advanced* option on the *Installation Type* page.
- 2 Specify the settings for your LDAP services, then click *Next*. (LDAP is used for user authentication and security.)
 - ♦ **LDAP Host:** Specify the IP address for your eDirectory server. In most cases this will be the same as the server on which you are installing Helpdesk.
 - ♦ **LDAP Port:** The default port for LDAP services is 389. However, this is a non-secure port and all authentication should use a secure connection. Please change this to port 636, which is for LDAP over SSL.
 - ♦ **LDAP SSL:** The default is set at 0 because LDAP is not secure over port 389. 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:** The fully 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 login ID and its context information.
 - ♦ **LDAP Base Organization:** The base context your Helpdesk application uses to authenticate users. Typically it is the top of the eDirectory tree.
 - ♦ **LDAP Password:** The password to be used by the LDAP proxy user.
 - ♦ **Helpdesk Object:** The eDirectory Helpdesk object's fully distinguished name.
 - ♦ **Admin FDN:** The fully distinguished name of the eDirectory tree's admin user.
 - ♦ **Admin User Password:** The password you use for your eDirectory tree's admin user.
- 3 Specify the settings for your database instance.
 - ♦ **MySQL User:** The user that will be used to manage the database. It needs full privileges.
 - ♦ **MySQL User Password:** The password to which the MySQL User is linked.
- 4 Click *Next* to continue your Helpdesk installation.
- 5 Specify the settings for your Helpdesk environment.
 - ♦ **Helpdesk Administrator User Name:** The login ID for the default administrator of your Helpdesk application.
 - ♦ **Password for Helpdesk Admin:** The password to which the default administrator login is linked.
 - ♦ **Helpdesk Tree:** Name of your eDirectory tree.
 - ♦ **Helpdesk Download Path:** The path from which all Helpdesk downloads occur. Keep the default to ensure that you receive updates from Novell appropriately.
 - ♦ **Helpdesk Upload Path:** This is the path from which all Helpdesk uploads occur. Keep the default to ensure that you receive updates from Novell appropriately.
 - ♦ **Helpdesk Title:** The name you want your employees to see when they log into your Helpdesk application.

- ♦ **Helpdesk Admin E-Mail:** The address to be used when users submit tickets and from which responses from Helpdesk are addressed. An example of this e-mail address is 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 password to which the Database User Name is linked.
 - ♦ **Helpdesk Data Password:** The password to which the Database User Name is linked.
 - ♦ **Helpdesk Mail Password:** The password used to log in to the Helpdesk support e-mail account.
 - ♦ **Helpdesk Mail User Name:** The login name of the Helpdesk support e-mail account.
- 6 Click *Next* to continue your Helpdesk installation.
- 7 Specify the settings for Advanced Helpdesk configurations, then click *Next*.
- ♦ **Helpdesk Send User Queue Change:** Keep the default of 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 the default of 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:** Keep the default of 1 to activate notification. Change to 0 to not notify users of a change to the technician assigned to their incident.
 - ♦ **Helpdesk Send User Status Change:** Keep the default of 1 to activate notification. Change to 0 to not notify users of a change in their incident's status.
 - ♦ **Helpdesk Send User Close:** Keep the default of 1 to activate notification. Change to 0 to not notify users of a change in their incident's status to Close.
 - ♦ **Helpdesk Web Helpdesk Page:** The address your Helpdesk users go to access your Helpdesk services.
 - ♦ **E-Mail Address of Queue Changes:** Specify the e-mail address to be used to send notifications of reassignments of queues.
 - ♦ **Helpdesk Technician Change E-Mail:** Specify the e-mail address to be used to send notifications of reassignments of technicians.
 - ♦ **Helpdesk Solution Change E-Mail:** Specify the e-mail address to be used to send notifications of incident solutions.
 - ♦ **Helpdesk Status Change E-Mail:** Specify the e-mail address to be used to send notifications of change to incident status.
 - ♦ **Helpdesk Priority Change E-Mail:** Specify the e-mail address to be used to send notifications of a change to incident priority.
 - ♦ **Helpdesk Default Technician:** Specify the default technician name for unassigned Helpdesk incidents.
 - ♦ **Helpdesk Technician Change E-Mail:** Specify the e-mail address to be used to send notifications of reassignments of technicians
 - ♦ **Helpdesk Auto Helpdesk Auto Assign:** Keep the default of 0 to not automatically assign incidents. Change to 1 to enable this feature.
 - ♦ **Helpdesk Allow Technician Assign:** Keep the default of 0 to not allow technicians to assign incidents. Change to 1 to enable this feature.
 - ♦ **Helpdesk Check Sleep Time:** The interval in seconds that the system uses to poll for incidents submitted by e-mail.

- ♦ **Helpdesk Ticket Sleep Time:** The interval in seconds the system polls for new incidents submitted through the Helpdesk interface.

8 Specify the additional Advanced Helpdesk configurations.

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

9 Click *Next* to continue your Helpdesk installation.

10 Review the settings you have chosen. If they are correct, click *Next* to complete your Helpdesk installation.

11 After the installation has completed, click the *Finish* button.

1.3.3 Uninstalling Helpdesk

- 1 Log in to your Nows SBE server administration GUI with the sbsadmin login and password.
- 2 Click the *Add/Remove* link, then locate and select the Helpdesk component from the list of installed components.
- 3 Click the *Uninstall* button. Confirm that you want to uninstall the component from your NowsBE server.
- 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.

There are four types of access that can be granted in the Helpdesk application. The role that is assigned dictates what a user can 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, and consult the knowledge base for solutions to previously diagnosed incidents.
- ♦ **Reporter:** This role is for the technician's managerial staff. It enables managers to report on the efficiency of their technical staff.
- ♦ **Administrator:** This role allows 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 he or she can add users and track the technical staff's efficiency.

- ♦ [Section 2.1, "Helpdesk User," on page 13](#)
- ♦ [Section 2.2, "Technician Role," on page 14](#)
- ♦ [Section 2.3, "Reporter Role," on page 16](#)
- ♦ [Section 2.4, "Administrator Role," on page 16](#)

2.1 Helpdesk User

Helpdesk provides an online 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.

A Helpdesk user has the most basic access in Helpdesk application. A user only has access to the *Incident* menu panel. From this panel, users have access to add or look up a Helpdesk ticket. After they are logged in, the Helpdesk users are directed to the Add New Incident page.

2.1.1 User Directions for Submitting a Helpdesk Ticket

- 1 On the Add New Incident page, click *Add*. In the *Problem* field, specify a description of your error. Be sure to write a detailed and accurate description of the problem. This allows 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 the 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:** A communication that does not need any action, such as Account deactivation.
- 4 (Optional) In the *Attachment* field, click *Browse* to browse to and insert an appropriate attachment, such as a log file or screen shot.
- 5 Click *Open Incident* to submit the incident ticket.

2.1.2 User Directions for Searching for a Helpdesk Ticket

- 1 Click *Lookup* to check on a submitted incident ticket.
- 2 Sort tickets by clicking the following headings: *ID*, *Date*, *Priority*, *Status*, or *Technician Assigned*.
- 3 Click *Details* to see specifics on your chosen Helpdesk ticket. You are directed to the *View Incidents* page.
- 4 On the *View Incident* page, check the information about your incident.
 - ♦ **Assigned Technician:** Name of technician who is working on your ticket.
 - ♦ **Solution:** A detailed description of the answer to your problem.

2.2 Technician Role

The *Technicians* panel is where you add Helpdesk tickets and visit existing and completed Helpdesk tickets assigned to you. The *Technician Add* field allows you to specify the username you are submitting the helpdesk ticket for. To access the *Technicians* panel, you must be a helpdesk technician or administrator.

A Helpdesk Technician is granted the basic Helpdesk access along with added access to the *Technicians* panel. Therefore, technicians can view both the *Incidents* panel and *Technicians* panel when they log in to 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.

2.2.1 Technician Add New Incident

- 1 Click *Add* under the *Technician* section.
- 2 In the *User* field, specify the user's name. This is associated with the incident ticket.

- 3 In the *Problem* field, specify a description of your error and your solution. Be sure to write a detailed and accurate description so that other technicians can use your solution as a resource in the future.
- 4 In the *Queue* field, select the appropriate category for the problem.
 - ♦ **General:** Miscellaneous problems.
 - ♦ **Network:** Port connectivity issues.
 - ♦ **Server:** Problems pertaining to account setup on the server.
 - ♦ **Workstation:** Problems pertaining to your issued laptop or desktop.
- 5 In the *Assign a Technician* field, you can specify a technician's name to allocate the incident.
- 6 Select the appropriate *Priority* field.
 - ♦ **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:** A communication that does not need any action, such as Account deactivation.
- 7 In the *Attachment* field, click *Browse* to insert an applicable attachment, such as a log file, screenshot, etc.
- 8 Click *Open Incident* to submit the incident ticket.

2.2.2 Technician Directions for Lookup Page

- 1 Click *Lookup* to check on a submitted incident ticket. When you are on the Helpdesk ticket search page, you can change the order of the Helpdesk tickets by clicking *Id*, *Date*, *Priority*, *Status*, or *Technician Assigned*.
- 2 To access all submitted Helpdesk tickets, click *Show All*.

2.2.3 Technician Directions for Knowledge Base

- 1 Click *Knowledge Base*. When you are on the *Knowledge Base* page, specify a keyword or keywords for the description of the desired incident.
- 2 Narrow your search by selecting the queue level that corresponds with the desired helpdesk ticket.
- 3 The *Date Range* menu allows you to narrow your search by selecting the time frame within the desired helpdesk ticket was submitted.
- 4 Press the Enter key on your keyboard to carry out the search.

2.3 Reporter Role

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

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

- ♦ Percentages of helpdesk tickets 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.

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.

2.3.1 Customizing a Search

In the *Custom* section, you can search by user, tech assigned to Helpdesk ticket, queue level, and status of Helpdesk ticket.

- 1 In the *User* field of the Incident Report page, you can specify the username of the individual who submitted the desired Helpdesk ticket.
- 2 In *Queue* drop-down menu, specify the queue level of the desired Helpdesk ticket.
- 3 In the *Tech* field, specify the name of the assigned Helpdesk technician. As you type the name of a technician, a drop-down field populates. Select the appropriate technician.
- 4 In the *Status* field, narrow your search by selecting the appropriate activity level of the desired helpdesk ticket.
- 5 Press Enter on your keyboard to carry out the search.

2.4 Administrator Role

To have access to the *Administrator* menu panel, you must be assigned the *Administrator* role. The *Administrator* 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 the Helpdesk.

A Helpdesk administrator has access to all other menu panels, as well as the *Administrator* panel. The *Event Viewers* page enables the administrator to have quick access to view all tickets submitted in Helpdesk regardless of the status.

2.4.1 Queues

Queues are divisions of tasks and can be customized to fit your business needs. Typically, queues are set up and named for the teams to 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 queue for the team assigned to the health of the network.

Your Helpdesk application can be used for more than IT staff. 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. Whatever configuration works for you and your staff, using this Helpdesk component assists you in getting questions and concerns to the right personnel and getting responses in a timely fashion.

2.4.2 Creating and Assigning Queues

- 1 Go to your Helpdesk link and log in as an administrator.
- 2 Click the link labeled *Queues* from the *Administrator* menu panel.
- 3 Click *Edit* on a new queue. To specify the name, delete any existing name, then type the new name. To complete the queue name alteration, click *Update*.
- 4 To designate a technician to a queue, click *Edit*.
- 5 Under the *Owner* column, scroll down until you find the name of the desired technician, select the name, then click *Update*.

2.4.3 Event Viewer

The Event Viewer allows quick access to view all open, closed, or unverified queues. This is the most flexible queue management search available on Helpdesk.

- 1 If the identification number of the desired ticket is known, specify it in the ID field, then click *Search*.
- 2 You can also search by queue or incident date. Click the respective drop-down menus and select the desired search item, then click *Search*.

2.4.4 Settings

This database is pre-populated from eDirectory. If there are specific changes that you want to make in your Helpdesk settings, this is where you make them. As an Administrator, it is important to note the following setting items:

- ♦ Data Password
- ♦ E-Mail address where changes are sent

- ♦ Default Global Technician
- ♦ Incoming Mail Server

At the bottom of the Settings page you can specify if you want notifications. Use 1 for yes, or 0 for no.

2.4.5 Roles

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

- 1 Log in by specify your Helpdesk username and password in the fields provided, then press the Enter key on your keyboard.
- 2 Specify the full name of the Helpdesk user in the *Technician*, *Reporter*, or *Administrator* fields.
- 3 Click *Add* to the right of the perspective field.