



Dell KACE K1000 Management Appliance

Service Desk Administrator Guide

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Setting up Your K1000 Management Appliance Service Desk

This guide provides information about creating a functioning Service Desk on your Dell KACE K1000 Management Appliance. Once the Service Desk is set up, users can create and track Service Desk tickets, and your staff will be able to track, manage, fix, and close those tickets. This guide also explains how you can customize Service Desk to meet your organization's needs.



This guide is independent of the Dell KACE JumpStart training for Service Desk, but covers some of the same material. Dell recommends using this guide to get your Service Desk up and running before attending JumpStart training.

About this chapter

This chapter lists the hardware and software needed to create a functioning Service Desk, introduces the Service Desk concepts, and then takes you step-by-step through the planning and implementation tasks for setting up a working Service Desk. After creating your Service Desk, you can use it as is, or follow the instructions in [Chapter 2: Managing and Maintaining Your Service Desk](#), starting on page 39, to modify it further to fit your organization's needs.

Required hardware and software

Service Desk requires the following hardware, software, and personnel:

- A Dell KACE K1000 Management Appliance on your LAN, with agents already deployed on all nodes. You need not have authorized your users yet. For information on setting up your K1000 Management Appliance, see “Configuring your Appliance” in the *Administrator Guide*.
- Your user account information stored in an LDAP-compliant directory service such as Microsoft® Active Directory®. This allows your Service Desk to efficiently find and import data that it uses to authorize users and identify anything else that you keep track of. You need to be familiar enough with LDAP to filter groups of users or other entities by referencing their LDAP attributes (organizational units, domain components, and relative distinguished names).
If your organization is small, you can eliminate this requirement by creating the needed information manually, one user at a time.
- One of the following types of email servers for sending and receiving Service Desk email:

- A POP3 email server.
- An email server, such as the Microsoft® Exchange Server®. For instructions on configuring this server to connect to the K1000 Management Appliance internal SMTP server, see [Using an SMTP Email Server](#), on page 91.
- A set of users with permissions to own, work on, and fix Service Desk tickets. Depending on your organization's needs, you can use your system administration staff or a separate group. You will give these users the permissions they need while setting up your Service Desk implementation.
- Trusted system administration staff with Administrator roles. The Administrator role has permission to change any appliance settings, so only give this permission level to your trusted system administration staff. You will give these users the permissions they need while setting up your Service Desk implementation.

Understanding Service Desk

Service Desk is a trouble ticket management system. It offers you a flexible and configurable tool for creating, tracking, and analyzing any hardware and software-related problems that your users have. It is integrated into the appliance user interface. After you configure it, your users use the Service Desk to file and track Service Desk tickets.

Users usually create tickets using the **Service Desk** component on the user interface. You also have the option of allowing them to do this using email messages.

The Service Desk provides you with a default ticket form already populated with some default fields. You can add up to 15 custom fields to keep track of any other information that your organization requires.

This is the default form (admin view):

The screenshot shows the 'New ticket' form in the K1000 Service Desk admin view. The form is titled 'New ticket' and includes a 'Back to ticket' button. The form fields are as follows:

- Title:** (required) [Text input field]
- Impact:** 1 person can't work [Dropdown menu]
- Category:** Other [Dropdown menu]
- Status:** New [Dropdown menu]
- Priority:** Medium [Dropdown menu]
- Owner:** Unassigned [Dropdown menu] Filter: [Text input] (0)
- Machine:** Unassigned [Dropdown menu] Filter: [Text input] (6)
- Asset:** Unassigned [Dropdown menu] Filter: [Text input] (8)
- Due Date:** None Mar 15 2011
- CC List:** None
- Submitter:** admin [User icon]
- See Also:** None
- Referrers:** None
- Owners only:**
- KB article lookup:** Select article to append... [Dropdown menu] Filter: [Text input] (0)
- Comment:** [Text area]
- Attachment:** [Text input] Browse... [Button]

At the bottom of the form, there are three buttons: Save, Save & List, and Cancel. The Session Timeout is 58 minutes.



If you are upgrading from an earlier release, your user interface refers to **Help Desk**, by default.

Service Desk uses permission-based *roles* to limit user actions. You create these roles and use them to group users by permissions. For example, most users only submit and track tickets and do not need permission to close tickets or change K1000 Management Appliance configuration settings.

Service Desk uses *labels* to group user accounts the same way labels are used to group your hardware and software inventories. You can make labels within Service Desk and use them to grant levels of access. This allows you to designate who can submit, accept, reject, work on,

and resolve tickets. Additionally, your Inventory labels can work as user labels in Service Desk labels if you have created the labels without restrictions. If not, you can modify them or create new ones.

Service Desk requires that each user creating or modifying a Service Desk ticket have an authenticated account on the K1000 Management Appliance. Dell recommends that you authenticate your users against your LDAP directory service, which captures minimal information about the user and adds it to the appliance database. Additionally, you need to capture a more comprehensive set of account data in a separate import step. Once set up, you can schedule regular data imports to keep user account information in your K1000 Management Appliance current.

The **Service Desk** tab on the Administrator Portal:



Service Desk tickets are stored in one or more *queues* on your K1000 Management Appliance. Most organizations need only a single queue. Though multiple queues can benefit many organizations, queues need to be implemented properly. Before you create any additional queues, read [Expanding your Service Desk by adding ticket queues](#), on page 59.

Service Desk comes pre-configured with the ticket settings listed below. You will almost certainly create more to meet your organization's needs:

Setting	Value
Impact	Many people can't work, Many people inconvenienced, 1 person can't work (default), 1 person inconvenienced
Category	Software, Hardware, and Network, Other (default)
Status	New (default), Open, Closed, Need more info
Priority	High, Medium (default), Low
States	Open (default), Closed, Stalled

You can set or change *escalation times* based on ticket Priorities. The default Service Desk automatically sends email to alert your staff (and/or their supervisors) if a ticket remains in an **Open** state too long. By default, a ticket with a priority of **High** is escalated if it is not modified or closed within 30 minutes. You can change the escalation times and the list of tickets they apply to.

You have a lot of flexibility in setting the level of email notification your users, Service Desk Staff, and their supervisory personnel receive regarding tickets. Most Dell customers set

email notification to a relatively low level to avoid being inundated with unnecessary email. For details, see [Configuring your Service Desk email and ticket settings](#), on page 29.

After a ticket is closed, the ticket submitter can be offered a brief *Satisfaction Survey* to gauge their level of satisfaction.

About your own Service Desk

To get Service Desk up and running quickly and efficiently, this guide takes you through the tasks necessary to create a typical Service Desk implementation. This process familiarizes you with the Service Desks features and their implications, and helps you avoid some of the pitfalls that result in an inefficient Service Desk implementation.

To set up Service Desk on your K1000 Management Appliance, you will:

- Select the staff to work on the tickets.
- Select an administration staff to configure and maintain your Service Desk.
- Create permission-based roles and apply them to all of your users.
- Create labels to organize your user accounts and apply them to groups of users.
- Customize your Service Desk implementation to include new ticket categories, statuses, and impact categories that meet your company's needs.
- Authenticate your users and import their user data from your LDAP directory into your K1000 Management Appliance. Your users, Service Desk Staff, and administrators are authenticated with this data each time they log in.
- Set up Service Desk email notification. The following email notification strategy is used by most Dell customers to prevent their staff from being inundated with unnecessary information:
 - When a new ticket is created, all of your Service Desk Staff receive email notification.
 - After a Service Desk Staff member takes ownership of the ticket, the rest of the staff does not receive email about the ticket unless it is escalated (although they can search for it).
 - The ticket submitter and owner are notified by email each time their ticket's State or Status changes.
 - The ticket owner is notified of any changes to the ticket.
 - If a ticket is escalated, the ticket owner and anyone in the Category CC list are notified.
- Customize the automated Service Desk email templates. Modify these templates to meet your organization's needs.
- Offer the Satisfaction survey to your users.

Planning your Service Desk implementation

This section describes the decisions that you need to make before starting to implement a Service Desk on your K1000 Management Appliance. Before starting to configure Service Desk:

- Select the members of your Service Desk Administration staff. These are members of your system administration staff who administer the Service Desk. They have permission to change all Service Desk settings, including creating and removing users, so make sure you select only trusted users. This guide refers to this group as *administrators*.

You can add additional members to this group at any time.

- Select members of your Service Desk Staff. This manual assumes that this is a different group from your administrators. The Service Desk Staff have permission to:
 - Open, work on, and close tickets.
 - Use and add items to the software library.
 - Add articles to the Knowledge Base.

But not:

- Create, edit, or delete users.
- Run reports.
- Change any other settings on your K1000 Management Appliance.

This guide refers to this group as your *Service Desk Staff*. To give them the permissions and information they require, you add this group to an **All Ticket Owners** label, a **Service Desk Staff** role, and a **DefaultTicketOwners@mydomain.com** email address.

You can add additional members to this group at any time.

- Decide what additional information to include in your tickets. The information depends on the ticket queue. If you use only the default queue, the default fields are:

New Ticket
The K1000 Service Desk

Title: (required)

Impact:

Category:

Status:

Priority:

Owner: Filter: (0)

Machine: Filter: (1)

Asset: Filter: (1)

Due Date: None Mar 15 2011

CC List: None

Submitter: admin

See Also: None

Referrers: None

Owners only:

KB article lookup: Filter: (0)

Comment:

Attachment:

Session Timeout: 54 minutes

You can customize the default ticket page view by reordering, renaming, or hiding any of these fields and add up to 15 fields to track anything your Service Desk Staff requires to do their jobs. These can be text fields or lists of choices (single or multiple select). Some typical custom field choices include:

- Problem-related information, such as additional symptoms, how long the problem has been happening, or other components that may contribute to the problem.
- Software-related information, such as manufacturer, version, purpose, and date installed.
- Service Desk Staff-only information that can be used for diagnosing, reporting, or planning purposes, such as “vendor contact for escalation,” “root cause,” or “previously fixed”



You can make any changes to the ticket fields after your Service Desk is up and running.

- Decide on your ticket characteristics. You can add your own ticket Categories, Statuses, Priorities, and Impacts.

You can add or change these items at any time. However, you cannot remove any values without first changing any tickets that use them to a different value.

Depending on the number of tickets you expect; the number of related and or repeated tickets; and the range of issues you want to include in Service Desk, such as Facilities, Human Resources, and Information Technology, you may want to set up:

- **Queues:** Use queues to organize tickets to designate the staff for handling different types of tasks, such as hardware tasks and software tasks. For information about setting up queues, see [Expanding your Service Desk by adding ticket queues](#), on page 59.
- **Processes:** Use processes to order related tickets that are parts of major or sequential tasks. You can also establish relationships by using parent-child relationships within tickets.

Now that you have the details of your Service Desk planned, follow the instructions in the remainder of this chapter to configure your new Service Desk implementation.

Setting up users and accounts for your Service Desk to use

Complete the tasks in this section to:

- Import user information into your new Service Desk implementation.
- Use that information to authenticate your K1000 Management Appliance users.
- Promote your Service Desk Staff.

Creating a new KACE_User in LDAP to read other LDAP accounts

Create a new account solely for the appliance to use in your LDAP server directory called **KACE_User**. The K1000 Management Appliance uses this account to read and import your other LDAP accounts. The account only needs read-only access to the LDAP server, but it must have a password that never expires. Because the password never expires, make sure it is very secure. You may eventually use this account to perform other tasks, but for now read-only permission is sufficient.

Default Service Desk roles

Your K1000 Management Appliance comes with 3 permission-based categories called *roles*. A role is a level of privilege that your K1000 Management Appliance uses to allow or deny

actions for a specific user. You configure your K1000 Management Appliance to automatically assign roles to users as they log in.

Role	Permissions
Admin	<p>The most powerful role on your K1000 Management Appliance. Admins have permission to see or change any information or settings in your K1000 Management Appliance implementation. This includes promoting or demoting other users by changing their roles. The Admin role cannot be altered or deleted. Assign only to your trusted system administrators.</p> <p>The K1000 Management Appliance always has at least one account (also called admin) that has the Admin role. The admin user account can never be deleted, although you can change its password or other related fields. People assigned the admin role have permission to manage and modify Service Desk tickets from the Tickets tab in the K1000 Management Appliance Management Center, though they may not be able to own tickets themselves.</p> <p>Administrators can also use the security, scripting, and distribution features to resolve Service Desk tickets and then use the Knowledge Base to create documentation that references the resolution for users.</p> <p>This role primarily interacts with the K1000 Management Appliance through the Admin Interface.</p>
Readonly Admin	<p>This role can view, but cannot change, any information or settings in your K1000 Management Appliance implementation. It is most useful for oversight personnel. This role primarily interacts with the K1000 Management Appliance through the Admin Interface.</p>
User	<p>The people being administered by your K1000 Management Appliance implementation. By default, this role has permission to create, view, or modify Service Desk tickets.</p> <p>This role interacts with the K1000 Management Appliance exclusively through the User Interface.</p>

In addition to the above roles, you need the **Service Desk Staff** role, which you create with the following instructions.

To create the Service Desk Staff role



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

This is a special-purpose role used to promote users to your Service Desk Staff. This role provides permission to own, work on, and close Service Desk tickets, deploy software, and add a knowledge base article, but not edit or delete users.

This role primarily interacts with the K1000 Management Appliance through the Administrator Interface.

1. Click **Service Desk > Roles**.

The User Roles page appears.

- In the **Choose Action** menu, click **Add New Item**.

The User Role : Edit Detail page appears.

- Enter this **Role Name** and **Description**:

User Role : Edit Detail

Record Created: 2011-01-12 16:05:19
 Record Last Modified: 2011-01-12 16:05:19

Role Name:

Description:

- Click the **[Expand All]** link next to **Permissions ADMIN Console**.

The permissions settings for all categories appear.

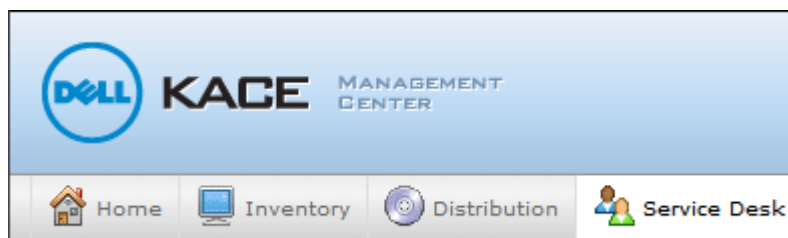
- Select these custom permission items for the new role:

Category	Item	Permission level
Home	All Read	
Inventory	Computers	write
	Software	write
	Processes	hide
	Startup	hide
	Service	hide
	IP Scan	hide
	MIA	hide
Asset	All Hide	
Virtual Kontainers	All Hide	
Distribution	Managed Installations	write
	File Synchronization	hide
	Wake-on-LAN	hide
	Replication	hide
	IPhone:	hide
	Dell Updates	hide
Scripting	All Hide	

Security	All Hide	
Service Desk	Tickets:	write
	Software Library	write
	Knowledge Base	write
	Users	read
	Roles	read
	Configuration	read
Reporting	All Hide	
Settings	All Hide	
User UI	All Read	

- Click **Save** at the bottom of the page.

The User Roles page is displayed with the new role. When a member of the Service Desk Staff logs in, the appliance component bar shows the available features.



To create an "All Ticket Owners" label



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

You will apply this label to your Service Desk Staff, giving them permission to own tickets.

- Click **Service Desk > Users**.
- In the **Choose Action** menu, click **Add Label**.

The Add Label dialog appears.



Avoid using a backslash (\) in Label names. If used, be sure to escape the backslash with another backslash.

- Enter **All Ticket Owners**.
- Click **Save**.

The new label is visible in the **Choose Action > Apply Label** menu.

To authenticate your users



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

You may have done this already if your K1000 Management Appliance is configured and working. If not, follow these steps to add user account information to your K1000 Management Appliance.

1. Click **Settings > Control Panel > User Authentication**.

The K1000 Settings: Authentication page appears.

2. Click **Edit Mode**.

3. Click the **External LDAP Server Authentication** radio button, and click **Add New Server**.

If the External LDAP Server Authentication is enabled, provide credentials for administrative login.



The LDAP user (**KACE_User**) should at least have READ access to the information in the **Search Base DN** field. If you do not specify an LDAP user name, then an anonymous bind is attempted.



All servers must have a valid IP address or Host Name entered in the **Server Host Name (or IP)** field, or the K1000 Management Appliance waits to timeout on an invalid IP address, resulting in login delays when using LDAP Authentication.

4. Fill in the **New Server** fields with your Active Directory information.

If you are unable to fill in the information for **Search Base DN** and **Search Filter**, you can use the LDAP Browser Wizard to specify that information. For details on using the LDAP Browser Wizard, see the “LDAP” chapter in the *Administrator Guide*.

Server Friendly Name	Enter your LDAP server name.
Server Host Name (or IP)	Enter the IP or hostname of the LDAP Server.
LDAP Port Number	Usually 389 or 636 .
Search Base DN	<p>Enter LDAP criteria to search for accounts.</p> <p>This criteria specifies a specific location/container in your LDAP structure. Make sure the criteria is as specific to include all the users that you want to authenticate.</p> <p>Enter the most specific combination of OUs, DCs, or CNs that match your criteria, ranging from left (most specific) to right (most general). For example, if the path leads to users that you need to authenticate: OU=End Users, OU=Users, DC=kace, DC=com.</p>

Search Filter	In most cases, you can leave this field with the default value (samaccountname=KBOX_USER) to match all valid users returned by the Search Base DN field. Each username is substituted at login time for the KBOX_USER variable. Search Base DN searches LDAP organizational trees for user objects. Use this field to further filter the data in the object trees.
LDAP Login	KACE_User This is the user you created in the Creating a new KACE_User in LDAP to read other LDAP accounts , on page 14, to read other LDAP accounts.
LDAP Password (if required)	Enter the KACE_User password.
Role	User




Record the search and filtering criteria you use for filling out this form. You will use this same information in the next section to import user data, and later to schedule regular authentication on a regular basis.

5. Click **Apply** to save your changes.
The Settings: Authentication screen appears again.
6. Test your parameters, as described in the next section.

To test the authentication



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Click **Settings > Control Panel > User Authentication**.
The K1000 Settings: Authentication page appears.
2. Click **Edit Mode**.
3. Select a user's account for which you know the username and password.
4. Click the  icon for the server the user is on.
5. In the **Search Filter:** box, replace **KBOX_USER** with the username to test.
The syntax is **samaccountname=username**.
6. Enter that user's password in the **Test User Password** box.
7. Select **Test LDAP Settings**.

A successful test displays:

```

Test LDAP Settings Test User Password: 
Testing New Server connection to: 1.test.kace.com on Port: 389
OK Connection Successful.
OK Setting Protocol Version 3 Successful.
OK Setting LDAP REFERRALS Option 0 Successful.
OK Search Bind using LDAP supplied credentials Successful.
OK LDAP search (with filter [(!daotest)]) Successful.
OK LDAP Search successful with 0 entries found.
OK Secondary bind using [] successful
OK LDAP Test Successful. Closing connection.

```

8. Confirm that the system found the account correctly and accepted the issued credentials.

If this test is successful, then this user and others in the same LDAP container will be successfully authenticated to the K1000 Management Appliance.

Importing user data into accounts

The authentication process added just enough user data to your K1000 Management Appliance to create user accounts. You now need to populate those accounts with a richer set of data for your Service Desk Staff to use to identify users and help fix their tickets. You do this by importing user information from your Active Directory in much the same way you authenticated users.

Password information is not imported; your users must authenticate themselves each time they log into the K1000 Management Appliance.



User account information is overwritten each time you import users.

To Choose Attributes to Import (Step 1 of 3):



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Click **Service Desk > Users**.

The Users page appears.

2. In the **Choose action** menu, click **Import Users**.

The Choose attributes to Import: Step 1 of 3 page appears.

3. Fill in the search criteria you used in [To authenticate your users](#), on page 18:



If you are unable to fill in the information for Search Base DN and Search Filter, you can use the LDAP Browser Wizard to specify that information. For details on using the LDAP Browser Wizard, see Chapter 13 of the *Administrator Guide*.

LDAP Server	Enter the IP address or hostname of your LDAP Server.
LDAP Port	Enter the LDAP port; usually 389 or 636 .
Search Base DN	Enter LDAP criteria to match accounts to import. Enter the most specific combination of organizational units and domain components that match your user accounts. List your criteria from left (most specific) to right (least specific). You can list criteria anywhere in your LDAP structure specific enough to match all of the users you want to import.
Search Filter	In most cases, use the samaccountname=* entry to match all entries returned by the Search Base DN field. This field also accepts regular expressions to further filter the user objects returned by the Search Base DN entry. Search Base DN searches LDAP organizational trees for user objects. Use this field to further filter the data in the object trees.
LDAP Login	<i>KACE_User</i> This is the user you created in Creating a new KACE_User in LDAP to read other LDAP accounts .
LDAP Password	Enter the KACE_User password.

4. Specify the attributes to import:

Attributes to retrieve	This field is populated with a useful set of attributes by default. Use the default list for now. If your organization requires different attributes, you can change this list later as needed. Note: Empty this field to display all possible attributes. However retrieving all attributes is inefficient and is not recommended.
Label Attribute	Leave the default (memberof) to list the members with these attributes. Change this as necessary.
Label Prefix:	Enter a label prefix to use. The default is ldap_ .
Binary Attributes:	Enter binary attributes to use. The default is objectsid,objectguid .
Max # of Rows	Enter the maximum number of rows to display at one time. The default is 27.
Debug Output	Select this check box to view the debug output in the next step.

The completed page looks like:

User : Import

Choose attributes to import: Step 1 of 3

LDAP Server:

LDAP Port:

Search Base DN:

Search Filter:

LDAP Login:

LDAP Password:

Attributes to retrieve:

Label Attribute: Label Prefix:

Binary Attributes:

Max # Rows:

Debug Output:

5. Click Next.

The Define Mapping between User and LDAP attributes: (Step 2 of 3) page is displayed.

To Define the User/LDAP Mapping (Step 2 of 3):



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. The fields in Red are mapped automatically, and you will see search results displayed below the mapping table. For example:

User : Import

Define mapping between User attributes and LDAP attributes: Step 2 of 3

Ldap Uid:	objectguid
User Name:	samaccountname
Full Name:	name
Email:	mail
Domain:	No Value

Search Results (144 of 144)

#	Cn	Description	Name	Objectguid
1	Account Operators	Members can administer domain user and group accounts	Account Operators	b5d86ec92ead754a7
2	admin 1	Domain Admin	admin 1	2e9c3dc7cd186d
3	Administrator	Built-in account for administering the computer/domain	Administrator	0bc218a3c47b864
4	Administrators	Administrators have complete and unrestricted access to the computer/domain	Administrators	6ea6a94e437cfc438
5	Allowed RODC Password Replication Group	Members in this group can have their passwords replicated to all read-only domain controllers in the domain	Allowed RODC Password Replication Group	cd11625499e18

2. Confirm the following:
 - The list of users to import is correct.
 - The information listed for each user is what you expect.
3. If you need to refine your search, click the **Back** button and revise the search parameters before returning to this page.
 For example to change the number of **Search Results**, change the **Max # Rows** on the Choose attributes to import: Step 1 of 3 page.
4. Click **Next**.
 The Import data into the K1000 Management Appliance : (Step 3 of 3) page is displayed.

To Import data into the K1000 Management Appliance (Step 3 of 3):



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Review the tables of users to ensure that the data is valid and includes the data that you expect.

Only users with an LDAP UID, User Name, and email address are imported. Any records that do not have these values are listed in the Users with invalid data table:

Users to be Imported									
#	Ldap Uid	User Name	Full Name	Email	Domain	Budget Code	Location	Work Phone	Home Phone
1	e7f838a3a3e8294d885fa1def148535a	kace1	kace1	kace1@kace.bz					
2	5a0fce38c8737b4d8043ce52f0514253	kbox	kbox	kbox@kace.bz					
None									
Labels to be Imported									
#	Label								
1	ldap Administrators								
2	ldap Domain Guests								
3	ldap Enterprise Admins								
None									
Existing Users (to be updated)									
None									
Existing Labels									
None									
Users with invalid data, will not be imported									
#	Samaccountname	Objectguid	Mail	Memberof	Displayname	Sn			
1	k2000	3a9c53f8848389419daaa74ab1ad5d59		Administrators	K2000				
2	krbtgt	ec9167f2c9258a45a2be6a50913f1325							

2. Click **Import Now** to start the import.

The Users page appears with the list of users you just imported.

3. Assign the **Admin** role to your Service Desk administrators:

- a. Select the check boxes for these users.

- b. In the **Choose Action** menu, click **Apply Role: Admin**.

By default, admin users have the owner/submitter permissions. If you think the setting might have changed, see [Setting permissions for creating and changing field values](#), on page 79.

4. Assign the **Service Desk Staff** role your team users:

- a. Select the check boxes for these users.

- b. In the **Choose Action** menu, click **Apply Role: Service Desk Staff**.

5. Assign the **All Ticket Owners** label to your Service Desk Team:

a. Select the check boxes for these users.

b. In the **Choose Action** menu, click **Apply Label > All Ticket Owners**.



If the label does not already exist, click **Add Label**. Then in the Add Label window, enter All Ticket Owners and click **Save**.

Avoid using a backslash (\) in Label names. If used, be sure to escape the backslash with another backslash.

The label is added to the next to each user's name:

<input type="checkbox"/>	User Name ↓	Role
<input type="checkbox"/>	Plapest [All Ticket Owners]	Service Desk Staff (LDAP)
<input type="checkbox"/>	Mpest [All Ticket Owners]	Service Desk Staff (LDAP)
<input type="checkbox"/>	VMpesla [All Ticket Owners]	Service Desk Staff (LDAP)

6. Create a label of **User**, then and apply the **User** label and **Role** your users.

<input type="checkbox"/>	User Name ↓	Role
<input type="checkbox"/>	jess [User]	User (LDAP)
<input type="checkbox"/>	dtestts [User]	User (LDAP)
<input type="checkbox"/>	jessie [User]	User (LDAP)

To set DefaultTicketOwners as the new ticket owner



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

Follow this procedure to allow the **DefaultTicketOwners** user to own new tickets as they are created.

Because **DefaultTicketOwners@mydomain.com** is your Service Desk Staff email alias, all of your Service Desk Staff receive the New Ticket email notification.

1. Click **Service Desk > Users**.

The Users page appears.

2. In the **Choose Action** menu, click **Add New Item**.

The User: Edit User Detail page appears.

3. Complete this form as follows:

(These are the only required fields.)

User Name:	DefaultTicketOwners
Full Name:	DefaultTicketOwners

Email	DefaultTicketOwners@mydomain.com
Password:	Enter a password.
Confirm Password:	Enter the password again.
Assign to Label:	All Ticket Owners
Local Override:	No Override
Role:	Login Not Allowed

4. Click **Save**.

You will assign this new user as the default new ticket owner in the next section.

Configuring your ticket default values

In this section, you use the Service Desk Configuration page to:

- Create a new ticket category called **Please Select a Category**. You set this category as the default category when you configure your Service Desk. Hopefully when your users see this “category” they will treat it as an instruction to select a more appropriate choice.
- Set your Service Desk Staff user as the default owner of all new tickets.



The first default owner always remains the default owner of a ticket. For example, if you switch an existing ticket to another category with a different default owner, the default owner of the ticket does not switch.

To customize your ticket default values





To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Click **Service Desk > Configuration > Queues**.
The Service Desk Queues page appears.
2. Click the default **The K1000 Help Desk** queue or other queue you wish to modify.
The Service Desk Configuration page appears.
3. Add **All Ticket Owners** label to the **Ticket Owners By Label** field by doing the following:
 - a. Click **Edit Mode**.
 - b. In the **Ticket Owners By Label** field, click **Edit**.
 - c. In the **Label Selection** dialog, select **All Ticket Owners** from the drop-down list, and then click **OK**.
 - d. Click **Save** at the bottom of the page.
4. In the **Ticket Defaults** section, click **Customize these Values**.
The Service Desk Customization page appears.

5. Under **Category Values**, click the  icon in the column heading to add a new category.

Editable fields appear for the new value.

Category Values 			
Name	Default Owner	CC List	User Settable
<input type="text"/>	Unassigned 	none	<input checked="" type="checkbox"/>



Fill in the fields as follows:

Name	Please select a category. This instructs your users to change to something more accurate.
Default Owner	DefaultTicketOwners
CC List	Leave as none . The CC List is not visible on a ticket; it is a behind-the-scenes value. Because DefaultTicketOwners is the default owner, all potential ticket owners will get email when a ticket is created.
User Settable	Select this check box if necessary. This makes this category visible to users. When cleared, the appliance allows only the Service Desk Staff users to see this category. Use this setting to present a simplified list of values to users and provides a comprehensive list to your administrators and Service Desk Staff. Users may see these categories as their tickets are processed, but they cannot set or change them.

6. Click **Save**.



Your organization will probably require additional ticket categories. You can do this now or after your Service Desk is up and running. For instructions on creating more ticket categories, see [Creating and Changing Ticket Categories, Statuses, States, and Priorities](#), on page 72.

7. For the remaining categories in **Category Values**, click the  icon and make the following changes:
 - a. Select **DefaultTicketOwners** from the drop-down list to make it the default owner of all of these Categories.
 - b. Remove anything in the **CC List**. (See [CC List](#) above.)
 - c. Save your changes.
8. Create a new status called **Waiting on end user**:
 - a. In the **Status Values** area, click the  icon.
The editable fields appear for the new status.

- b. Edit the **Status Values** fields to create a new **Waiting on end user** ticket status with a State of **Stalled** as shown here:

Status Values ?	
Name	State
Waiting on end user	Stalled

- c. Click **Save**.

9. In the **Status Values** area, create these additional statuses:

- Name: **Waiting on Service Desk Staff**, State: **Stalled**
- Name: **Reopened**, State: **Opened**

Status Values ?	
Name	State
Waiting on end user	Stalled
Waiting on Service Desk Staff	Stalled
Reopened	Opened



Only tickets with an **Opened** State can be escalated. For details, see [Understanding ticket escalation](#), on page 44. Use the other states as you find appropriate.

10. In the **Priority Values** area, create a new **Critical** priority with an escalation time of 30 minutes:

Priority Values ?		
Name	Color	Escalation Time
Critical	Red	30 minutes

11. Change the Escalation Time for **High** priority to 2 hours and the color to a value of your choice.
12. Click the **Save** button at the bottom of the page.

Now that your ticket default values are set, use the instructions in the next section to finish configuring your Service Desk.

Configuring your Service Desk email and ticket settings

This section explains how to set up the email notification strategy described in the [About your own Service Desk](#), on page 11.



In general, the K1000 Management Appliance should never be configured to email itself. For example, if a queue's email address is helpdesk@kace.com, then helpdesk@kace.com address should not be a valid for a category cc nor any of the other several places where email addresses can be specified.

Creating and configuring email accounts for your appliance

Your K1000 Management Appliance is designed to receive email from a POP3 email server. If you do not use a POP3 email server, you can use the built-in SMTP server to accept incoming email messages from your internal email server. However, setting up a K1000 Management Appliance to work with a POP3 server is much easier. If you cannot use the POP3 setup option, see [Appendix A: Configuring your email server](#), starting on page 92.



The K1000 Management Appliance POP3 email server must pass authentication information and the email text itself as clear text.

This section explains how to create and configure the K1000 Management Appliance email accounts for use with the Service Desk users and staff. The two accounts are:

- **Support@mydomain.com.** This email address is used for:
 - Receiving all new tickets when they are created.
 - Users and Service Desk Staff to automatically create and/or modify tickets.
 - The email address that your users can reply to.No human reads email delivered to this address, but your Service Desk Staff are notified of the ticket changes resulting from the email.
- **DefaultTicketOwners@mydomain.com.** This email alias is used:
 - By your Service Desk Staff to communicate with each other.
 - By the K1000 Management Appliance to send automated email notification about new and open tickets.

To set up your Service Desk to process mail using a POP3 server



To perform these steps, be sure to select **System** in the **Organization** drop-down list in the top-right hand corner of the page.

1. Create **Support@mydomain.com** as a valid email address on your POP3 email server.

- Configure **DefaultTicketOwners@mydomain.com** as the Service Desk Staff email alias, and add all of your Service Desk Staff addresses to it.

This is the general-purpose email alias that your Service Desk Staff will use to communicate with each other.

- To enable the Help Desk POP3 server, from the **Organization** drop-down list, select **System**.
- Select **K1000 Settings > Control Panel > Network Settings**.

The K1000 Network Setting page is displayed

K1000 Network Settings

Edit Mode
Read Only Mode

Last Updated: Jan 26 2011, 07:53:07 AM

K1000 DNS Hostname (e.g. kbox):	qak1latest
K1000 Web Server Name:	qak1latest.test.kace.com
Static IP Address:	10.159.17.119
Domain (e.g. kace.com):	test.kace.com
Subnet Mask:	255.255.248.0
Default Gateway:	10.159.16.1
Primary DNS:	10.159.16.100
Secondary DNS:	10.159.16.101
Network Speed:	Auto-negotiate (1000 Mbps full-duplex)

Network Server Options

Use SMTP Server

Use Proxy Server

Enable Service Desk POP3 Server

Service Desk POP3 Server:

Save
Cancel

- Click **Edit Mode**.
- Select **Enable Service Desk POP3 Server**.
The **Service Desk POP3 Server** field is displayed.
- Enter the name of your POP Server.
- Click **Save**.

Continue on with [To do basic queue configuration](#), on page 31.

To do basic queue configuration



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Click **Service Desk > Configuration > Queues**.
The Service Desk Queues page appears.
2. Click the default **The K1000 Help Desk** queue or any queue you wish to modify.
The Service Desk Configuration page appears.
3. Click **Edit Mode**.
4. Provide credentials (a username and password) for the account your users will be sending mail to. This is the same account you created in step 1.

Name	The name of the Service Desk queue. This name is displayed in the From field when users receive emails from the Service Desk.
Email Address	Users typically do not reply to this address. It is a fully qualified email address for the server. If you allow users to reply to K1000 Management Appliance email, specify an email address in the Alt. Email Address field.
Alt. Email Address	Support@mydomain.com The primary email address your users send email to. The K1000 Management Appliance also uses it to send email from the Service Desk. This is a valid email address users can use to reply to when they receive a Service Desk email from the appliance. You created this account in Creating and configuring email accounts for your appliance , on page 29. Confirm that the domain name is correct for your email service. Note that as a valid email address, it is subject to the same spam and security vulnerabilities as any other email address.
Allow all users as submitters	Allows anyone who is a user on the K1000 Management Appliance is allowed to submit tickets through the Service Desk that you are configuring. Typically this is selected.
Restrict Submitters By Label	Visible only when Allow all users as submitters is not selected. This allows you to select submitters by label.
Allow all users as approvers	
Restrict Approvers By Label	Visible only when Allow all users as approvers is not selected. This allows you to select approvers by label.
Ticket Owners By Label	Confirm that All Ticket Owners is the label selected. Designates which users are allowed to own and manage tickets, typically your IT staff. You must have a Ticket Owner; otherwise no one exists to manage tickets through their life cycle.
Accept email from unknown users	Typically, do not select. Selecting allows unrecognized users to create tickets, including spammers.

Allow ticket deletion	Allows ticket owners and administrators to delete tickets. Clearing this check box means no one can delete tickets. If don't want your staff to be able to delete tickets, you can periodically select this check box to clean out old tickets, and then clear it again.
Allow parent ticket to close child tickets	
Grant read/edit permissions to users with an Admin role (admin portal only):	

5. Change the default ticket category to **Please select a category** using the **Category** drop-down list.
6. Confirm that the other Ticket Defaults are set to the default settings:
 - **Status:** New
 - **Impact:** 1 person can't work
 - **Priority:** Medium
7. Click **Save**.

Now that you have created and configured the required email addresses, follow the instructions in the next section to configure email communication on your K1000 Management Appliance.

Configuring the email triggers and email templates

This section explains how to set up triggers that automatically send email from the K1000 Management Appliance and use templates to set the content of those email messages. The **Email on Events** section determines which actions trigger an email to the various K1000 Management Appliance users. The Service Desk Email Customization page allows you to modify the templates used for sending email.

To configure email triggers



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Click **Service Desk > Configuration > Queues**.
The Service Desk Queues page appears.
2. Click the default **The K1000 Help Desk** queue or any queue you wish to modify.
The Service Desk Configuration page appears.
3. In the **Email on Events** section click **Customize Emails**.
4. Configure the email settings as needed.

Each column represents a type of Service Desk user (role) and each row represents an event concerning the ticket.

- **Owner:** The person who is expected to resolve the ticket.
- **Submitter:** The person whose issue is being resolved.
- **Approver:** Allows or rejects the ticket for processing.
- **Ticket CC:** One or more email addresses that are notified of the ticket or changes to the ticket.
- **Category CC:** One or more email addresses that are notified of the ticket or changes to the ticket for a particular category, such as the software category.

When an event occurs, the role for the selected check box receives an email. For example, when the **Any change** box in the **Owner** column is selected, an email is sent to the ticket owner that some kind of change was made to the ticket. However, if the ticket owner does not receive an email when the owner makes a change. The following graphic shows the default settings:

Email on Events: [Customize Emails]					
	Owner	Submitter	Approver	Ticket CC	Category CC
Any Change	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Owner Change	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Status Change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Comment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Approval Change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resolution Change	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Escalation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ticket Closed		<input checked="" type="checkbox"/>			
New Ticket Via Email		<input checked="" type="checkbox"/>			

5. Click **Save**.

To customize the Service Desk email templates



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

The Service Desk Email Customization page contains the email templates that Service Desk uses to generate email messages. You can modify these templates as required.

1. Click **Service Desk > Configuration > Queues**.

The Service Desk Queues page appears.

2. Click the default **The K1000 Help Desk** queue or any queue you wish to modify.

The Service Desk Configuration page appears.

3. In the **Email on Events** section, click **Customize Emails**.

The Service Desk Email Customization page appears.

The following email templates are available:

- **Ticket Escalation**

- **Email Ticket Creation Acknowledgement**
 - **Ticket Change Notification**
 - **Ticket Closed Notification**
 - **Response To Unknown Email Address**
 - **Email Ticket Error**
4. Change these templates as your organization requires.
- You can use any *\$variable* listed in the **Configuration Notes** on the right of the **Service Desk Email Customization** page in these email messages.



You can move, but not change these variables.

5. After making your changes, click **Save**.

For instructions on how to configure your K1000 Management Appliance to use your email system, see [Appendix A: Using an SMTP Email Server](#), starting on page 91.

Renaming your Service Desk

Optionally, you can change the text in many fields in the Service Desk. You can rename:

- Main tab
- Queues
- Tickets
- Processes

You can also select your default queue. (You don't need to configure this queue if you use only the default one.)

To rename Service Desk



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

If you don't want to use the default text, you can change the text on the tabs and the titles of some windows.

1. Click **Service Desk > Configuration > Settings**.

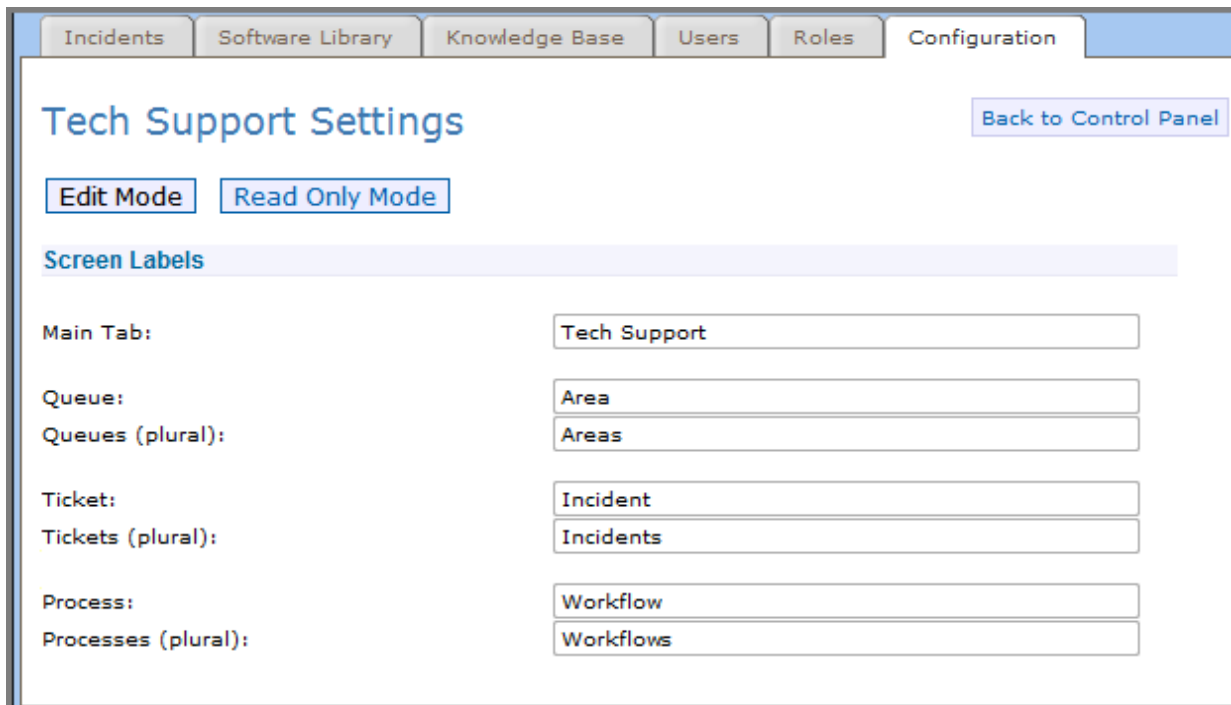
The Service Desk Settings page appears.

2. Click **Edit Mode**.

Main Tab	This is the text that is displayed on the component level. The default is Service Desk .
-----------------	---

Queue Queues	Enter the text that you want to display instead of Queue and Queues .
Ticket Tickets	Enter the text that you want to display instead of Ticket and Tickets .
Process Processes	Enter the text that you want to display instead of Process and Processes .

The following example shows several changes. In particular, notice that **Tech Support Settings** appears as the page title:



The screenshot shows the 'Tech Support Settings' configuration page. At the top, there are navigation tabs: Incidents, Software Library, Knowledge Base, Users, Roles, and Configuration. The page title is 'Tech Support Settings' with a 'Back to Control Panel' button. Below the title are two mode buttons: 'Edit Mode' and 'Read Only Mode'. The 'Screen Labels' section contains the following fields:

- Main Tab: Tech Support
- Queue: Area
- Queues (plural): Areas
- Ticket: Incident
- Tickets (plural): Incidents
- Process: Workflow
- Processes (plural): Workflows

3. Click **Save Settings**.

About the Satisfaction Survey

After a ticket is closed, by default the Service Desk offers the ticket submitter a brief Satisfaction Survey to indicate their level of satisfaction about how the ticket was handled. Submitters can add comments to the survey to further explain their opinions.

When a ticket is closed, a Ticket Closed Notification email message is sent to the submitter mentioning the Satisfaction Survey. By default, the survey is visible to the submitter when they open a closed ticket for the first time, and thereafter until the survey is completed. Once the survey rating and comments are saved, the survey is hidden. Survey scores and comments are stored in the ticket and are not editable by the Service Desk Staff.

You can run a variety of reports to display and analyze survey data using Service Desk Reports.

The example Service Desk you configured in this chapter uses the default Satisfaction Survey behavior. You can also de-emphasize or disable the Satisfaction Survey. For details, see [Changing the Satisfaction Survey default behavior](#), on page 36.

Changing the Satisfaction Survey default behavior

You can choose to make the Satisfaction Survey less prominent by moving the SAT_SURVEY ticket field further down on the ticket layout.

You can also remove the Satisfaction Survey by:

- Editing the Ticket Closed Notification email text to exclude the survey instructions, or disabling this email altogether using the instructions in the [To Enable/Disable the Ticket Closed email](#), on page 36.
- Hiding the SAT_SURVEY ticket field using the instructions in [To Remove the Satisfaction Survey field from tickets](#).

To Remove the Satisfaction Survey field from tickets



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Click **Service Desk > Configuration > Queues**.

The Service Desk Queues page appears.

2. Click the default **The K1000 Help Desk** queue or other queue you wish to modify. The Service Desk Configuration page appears.

3. Click **Customize Fields and Layout**.

The Service Desk Customization page appears.

4. Under **Ticket Layout**, click the  icon for the **SAT_SURVEY** field.

5. Under **Permissions**, select **Hidden** from the drop-down menu.

6. Click the **Save** button to the left of this item.

7. Click the **Save** button at the bottom of the page to make these changes take effect.

The Satisfaction survey is now disabled, and your ticket submitters will no longer be asked to fill it out.

To Enable/Disable the Ticket Closed email



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

You toggle this feature on and off by using the **Ticket Closed/Submitter** email item on the **Service Desk Configuration** page.

1. Click **Service Desk > Configuration**, and click **Queues**.

The Service Desk Queues page appears.

2. Click the default **The K1000 Help Desk** queue or other queue you wish to modify. The Service Desk Configuration page appears.
3. In the **Email on Events** section, click **Customize Emails**.
4. Under **Ticket Closed Notification**:
 - a. Remove any mention of the Satisfaction Survey.
 - b. Enter information appropriate to your company.
5. (Optional) To disable the email that submitters receive when their tickets are closed:
 - a. Return to the Service Desk Configuration page and click **Edit Mode**.
 - b. Clear the check box in the **Ticket Closed** row for the **Submitter**.

Email on Events: [Customize Emails]		
	Owner	Submitter
Any Change	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Owner Change	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Status Change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Comment	<input type="checkbox"/>	<input type="checkbox"/>
Resolution Change	<input type="checkbox"/>	<input type="checkbox"/>
Escalation	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ticket Closed	<input type="checkbox"/>	<input checked="" type="checkbox"/>
New Ticket Via Email	<input type="checkbox"/>	<input checked="" type="checkbox"/>

If the box is selected, the **Ticket Closed Notification** is sent to the submitter when the ticket is closed. If cleared, this email is not sent.

6. Click the **Save** button at the bottom of the page.

What's next

Now that you have configured your Service Desk implementation, it is nearly ready to start accepting new tickets. See [Chapter 2: Managing and Maintaining Your Service Desk](#), starting on page 39, for more information on maintaining, managing, and customizing your Service Desk.

Managing and Maintaining Your Service Desk

This chapter explains the maintenance tasks necessary to keep your Dell KACE K1000 Management Appliance Service Desk up-to-date and describes more Service Desk features that can use to save time for your staff.

This chapter assumes that you completed the instructions in [Chapter 1: Setting up Your K1000 Management Appliance Service Desk](#), starting on page 7, and set up a K1000 Management Appliance Service Desk implementation.

Maintaining your Service Desk

This section explains the general maintenance tasks that most Dell KACE K1000 Management Appliance users perform to keep their Service Desk information accurate.

Scheduling regular user data imports

Now that you've set up LDAP authentication, any user with LDAP credentials can log into the K1000 Management Appliance and submit a ticket using the Service Desk tab. You'll probably want to schedule periodic user data imports to keep this user data current and accurate. Most organizations schedule weekly authentication.

To schedule regular LDAP user data imports




To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

- 1. Click **Settings > Control Panel > User Authentication.****

The K1000 Settings: Authentication page appears.

- 2. Click **Edit Mode.****

- 3. Select the **External LDAP Server Authentication** radio button.**

- 4. Click the alarm clock icon  for a server to schedule an authentication.**

The User Import : Schedule, Choose Attributes to Import (Step 1 of 3) page appears.

- Under **Scheduling** select a time to run the import, and then click **Next**.

The User Import : Schedule, Define mapping between User attributes and LDAP attributes: Step 2 of 3 page is displayed.

- Define the mapping between User attributes and LDAP attributes as described in [To Define the User/LDAP Mapping \(Step 2 of 3\)](#); on page 22, and then click **Next**.

The User Import : Schedule, Import data into the K1000: Step 3 of 3 page is displayed.

- Check the list of Users and make sure the information you intended to import is being displayed, and then click **save**.

Your Service Desk will now import user account information from your LDAP server directory on the schedule you specified.

To add a new member to your Service Desk Staff



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

Perform these steps to add a new user to your Service Desk Staff:

- Add the new user to your **DefaultTicketOwners@mydomain.com** email alias in your email system.
- Add the new user to the Service Desk:
 - Click **Service Desk > Users**.
 - From the **Choose Action menu**, select **Add New Item**.
- In the User : Edit User Detail page, enter necessary user information in the appropriate fields.
- Assign the new user the **All Ticket Owners** label and **Service Desk Staff** role.

The new user now has permission to own, modify, fix, and close tickets, and will automatically get email when new tickets are created.

Managing your Service Desk email

Service Desk systems often generate too much email for their administrators to track. The Service Desk email notification options can help solve this problem. Dell KACE recommends that you set up email notification with these limitations:

- Ticket submitters receive mail when a ticket is modified, escalated, or closed.
- All Service Desk owners receive email when a ticket is created.
- The ticket owner receives email when the ticket is created or escalated.

These settings reflect the default email settings you configured in [Configuring your Service Desk email and ticket settings](#), on page 29.

To change these settings, go to **Service Desk > Configuration > Queues** page, select a queue, and then edit the **Email On Events** section on the Service Desk Configuration page.

Managing Service Desk tickets

After a ticket is submitted to the Service Desk, it is the responsibility of the ticket owner to resolve it. The owner reviews the ticket, adjusts the impact if necessary, and assigns a priority. If the ticket issue is straightforward, the owner might resolve the issue quickly then close the ticket. In more complicated situations however, a ticket may take more time to close, and be assigned to different owners over its lifetime.

If the owner is unable to resolve the ticket within its escalation time limit, escalation email is sent.

Depending on the configuration, the submitter of a ticket might receive a satisfaction survey to gather feedback about the way the ticket was handled, after the ticket is closed. For more information about the satisfaction survey, see [About the Satisfaction Survey](#), on page 35.

Prohibiting administrators and ticket owners from deleting tickets

By default, any Service Desk administrator or ticket owner can delete tickets from a queue. You can toggle this option on and off by using the **Allow Ticket Deletion** check box on the queue's **Service Desk Configuration** page. When this box is clear, no tickets can be deleted within that queue. If checked, any Service Desk administrator can delete tickets.



If you use this option, you can periodically clear the check box to clean out old tickets, and then re-enable again.

Access this page by going to the **Service Desk > Configuration > Queues** page and selecting a queue.

Working with filed tickets

You can work with filed tickets through the **Ticket Actions** link on the ticket.

Stage	Ticket	Title	Queue	Status	Submitter	Owner
1	2	HR paperwork	The KBOX Help Desk	New	User_1	Unassigned
1	3	Set computer	The KBOX Help Desk	New	User_1	Unassigned

Through Ticket Actions you can:

- Delete tickets (if ticket deletion is allowed through the queue).
- Move tickets to another queues (if you use more than one queue).
- Convert the process ticket to a regular ticket (if you select a parent ticket in a process).
- If your ticket is a process ticket, that is displayed on the ticket detail page. For more information on parent and child tickets, see [Setting up parent/child ticket relationships](#), on page 82.

Creating and updating tickets by email

In [Chapter 1: Setting up Your K1000 Management Appliance Service Desk](#), starting on page 7, you configured your K1000 Management Appliance to allow users to create and modify tickets using email. This feature is primarily intended as a time saving tool for your Service Desk Staff, but you may want to offer it to your more sophisticated users as well.

Submitting tickets through email

Any user with permission to submit Service Desk tickets (often all K1000 Management Appliance users) may also submit them by sending email to the Service Desk email address configured in the Service Desk settings. Tickets created from emails receive the default values for Impact, Category, and Priority configured on the **Service Desk Configuration** page. The body of the mail message is added as a comment. The **Submitter**: field is filled in based on the sender's email address.

You set up email ticket creation in [Setting up Your K1000 Management Appliance Service Desk](#), on page 7, with these steps:

- You selected the **Accept email from unknown users**: check box on the **Service Desk > Configuration > Queues > Queue_name > Service Desk Configuration** page.

- You set up a valid email account (**Support@mydomain.com**) for users to send ticket-creation emails to and added this email address to the **Alt. Email Address** field of the Service Desk Configuration page.

Modifying ticket attributes using email

Service Desk users may change certain ticket attributes by email using the email variables (variables with the “@” symbol) at the beginning of an email to the Service Desk. Any text after the last email variable is added to the ticket **Comment** : field.

For example, sending this email text to **Support@mydomain.com** closes the ticket, changes the owner, and adds a comment:

```
@status=closed
@owner=joe
```

```
I fixed that problem. If it happens again, talk to Joe.
```

If you enter invalid fields or field values, an error results.

Errors are emailed back to you using the K1000 Management Appliance Email **Ticket Error Template**. For more information on email templates, see [Configuring your ticket default values](#), on page 26.

Clearing a ticket field using email

You can empty any field with this syntax: `@fieldname=`. For example the following entry empties the due date field:

```
@due_date=
```

Changing ticket fields using email

Users can change the following ticket attributes using an email message if the value of the ticket field is set to User Modify. (For information on changing a ticket field permissions, see [Setting up approvals for tickets](#), on page 87.)

@category	Enter a valid category.
@cc_list	Enter a comma-separated list of email addresses.
@due_date	Enter a date. The date can be in any format. For example, 2/3/2004, Next Friday, or February 3, 2004.
@impact	Enter a valid ticket impact.
@owner	Enter the owner's user name, full name, or email address.
@priority	Enter a valid ticket priority.
@resolution	Enter a resolution.
@status	Enter a valid ticket status.

@submitter	Enter the submitter's user name, full name, or email address. If the specified name does not match an existing user, and if the queue has Accept email from unknown users check box selected, a new user is created. If you think that this might happen, you can include both a full name and an email address. For example, Joe User joeuser@anycompany.com
@title	Enter a title for the ticket.

Changing ticket approval fields using email

A user designated as a ticket approver can also change these ticket fields using an email message:

@approval	Can be one of: Approved, Rejected, None, or More Information Needed.
@approver	Changes the ticket approver. Enter a username from your ticket approval label. For instructions on setting up the label of approvers, see Setting up approvals for tickets , on page 87.
@approval_note	Enter a comment.

For information on setting up ticket approvals, see [Setting up approvals for tickets](#), on page 87.

Setting or changing custom fields using email

You can also set any custom fields in your email using the same syntax:

@custom_fieldname=newvalue.

The custom field cannot include empty spaces. Use an underscore between words; for example, **new_value**.

You can also use:

- **@priority = high**
- **@priority = very urgent**

If you put a bad value into a select or multiselect custom field, an error results. Use a comma-separated list of values for multiselect custom fields.

Understanding ticket escalation

The escalation process is a mechanism for alerting your Service Desk Staff and/or their supervisors when a ticket is ignored for a specified time limit. When a ticket meets certain criteria, email is sent to a group that you specify alerting them with an email message that you configure. This gives you a way to monitor service level agreements, and allows you to automatically notify a larger or different group when a ticket hasn't been handled properly.

Escalation email is sent at the end of the escalation time limit for tickets with:

- A Status corresponding to a State of **Opened**.

- A Priority that includes an Escalation Time.

The example below shows the default ticket statuses and priorities with the escalation settings circled. These settings direct the appliance to send escalation email for tickets with a Status and State of **Opened** and a Priority of **High**, after 30 minutes of inactivity.

You can:

- Configure escalation email for tickets with other priorities.
- Change the escalation time limits.
- Determine who receives escalation email.
- Customize the email form to meet your company's needs.

Status Values ?		
Name	State	
New	Stalled	
Opened	Opened	
Closed	Closed	
Need More Info	Stalled	
Priority Values ?		
Name	Color	Escalation Time
High	Red	30 minutes
Medium	Black	none
Low	Gray	none

Understanding ticket states

The Service Desk ticket escalation process is the only K1000 Management Appliance behavior that requires you consider Service Desk ticket *State*. The three states are: **Opened**, **Stalled**, and **Closed**. **Opened** is the only ticket state that allows a ticket to be escalated. This is a non-configurable condition, which is important to remember when you are creating custom Status values.



Using the default settings, ticket owners must change **High** Priority tickets from a **New** Status to an **Opened** Status before they are eligible for escalation. The **Opened** Status gives tickets the corresponding required State of **Opened**.

Understanding the escalation time limit

Once a ticket with a State of **Opened** is created, its escalation time starts running. Any change to the ticket resets the time limit to 0. If the escalation time runs out, escalation email is sent and the timer starts again. If no changes are made to the ticket, the time limit keeps

resetting and escalation mail is sent each time the limit is reached. By default, escalation mail is sent every 30 minutes until the ticket is changed.

Understanding escalation email

You determine who receives the escalation emails using the **Email on Events** area of the **Service Desk Configuration** page and/or the **Category CC** list on each ticket. You can choose to send the escalation email to any of the following:

- The ticket owner.
- The submitter.
- The people with the technical skills to resolve the issue.
- The people with the authority to dedicate more resources to the problem.

This is the default Ticket Escalation message:

The screenshot shows a web interface for 'Service Desk Email Customization'. The navigation bar includes Home, Inventory, Virtual Containers, Asset, Distribution, Scripting, and Settings. The main menu has Tickets, Software Library, Knowledge Base, Users, Roles, and Configuration. The 'Ticket Escalation' section is active, showing a form with the following content:

Subject:

Body:

See [Configuring your Service Desk email and ticket settings](#), on page 29, for details on changing this form.

Changing the Ticket Escalation settings

The Service Desk implementation you created in [Chapter 1: Setting up Your K1000 Management Appliance Service Desk](#), starting on page 7, is configured to send escalation email to ticket owners and any users in the Category CC list (none by default) of each ticket. Escalation email is sent for tickets with a Priority of **High** that have been moved from a **New** to **Opened** Status, and then not worked for a period of 30 minutes. You can change any of these escalation email characteristics.

Making tickets eligible for escalation

If you are using the default settings, change the ticket Status from **New** to **Opened**.

If you have changed the default settings, make sure at least one of your Statuses has a State of **Opened**, and give the ticket that Status.

You may want to give your tickets a Status with an **Opened** state by default, or create a policy that ticket owners change tickets status as soon as they take ownership.

See [Configuring your ticket default values](#), on page 26, for details on creating or changing statuses and their states.

To change the list of escalation email recipients



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Click **Service Desk > Configuration > Queues**.

The Service Desk Queues page appears.

2. Click one of the following:

- The default **The K1000 Help Desk** queue.
- Another queue if you define more than one (most implementations do not).

The Service Desk Configuration page appears.

3. Click **Edit Mode**,

4. Select the appropriate check boxes to add users as escalation email recipients.

If the **Category CC** box is checked, you can add more individual email recipients to individual tickets.


Email on Events:	Owner	Submitter	Approver	Ticket CC	Category CC
Any Change	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Owner Change	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Status Change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Comment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Approval Change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resolution Change	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Escalation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ticket Closed		<input checked="" type="checkbox"/>			
New Ticket Via Email		<input checked="" type="checkbox"/>			

5. Click **Save**.

To change the escalation time limits



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Go to **Service Desk > Configuration > Queues**.
The Service Desk Queues page appears.
2. Click one of the following:
 - The default **The K1000 Help Desk** queue.
 - Another queue if you define more than one (most implementations do not).The Service Desk Configuration page appears.
3. Click **Ticket Defaults [Customize These Values]**.
The Service Desk Customization page appears.
4. Click the  icon for each row under **Priority Values** to receive a new or changed escalation time limit.
5. Click **Save**.

To change the default escalation email message



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Click **Service Desk > Configuration > Queues**.
The Service Desk Queues page appears.
2. Click one of the following:
 - The default **The K1000 Help Desk** queue.
 - Another queue if you define more than one (most implementations do not).The Service Desk Configuration page appears.
3. In the **Email on Events** section, click the **Customize Emails** link.
The Help Desk Email Customization page appears.
4. Make any changes to the **Ticket Escalation** form that your organization requires.
5. Click **Save**.

Adding owner-only comments to a ticket

You can add comments to a ticket that only ticket owners can see by using the **Owners-only** check box on the each ticket's detail page. However, this option can be turned off at any time using the same check box. Other ticket owners have permission to clear this box and may not read the comments before doing so. So Dell advises that you:

- Always use discretion in these comments.
- Have a clear, well documented policy for changing this setting.

Using a custom view

A Custom View can help you restrict the type or number of tickets displayed by the **Tickets** tab so that you see more of the tickets you are interested in. A Custom View offers you a wide variety of criteria and operators to use to filter your view.

To create a custom view for critical tickets



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

This section creates a filter called **All Open Critical** that displays only open tickets owned by **Service Desk Team** with a priority of **Critical**.

1. Go to **Service Desk > Tickets** tab.
The Tickets page appears displaying all open tickets.
2. Select the **Custom View** tab the right side of the page.
The Custom View page appears.
3. Select a Priority from the drop-down list in the upper left box as the first criteria for your custom view.
4. Continue adding criteria to your view to specify a user name of **Service Desk Team** and a priority of **Critical** and a **Status of Not Closed**:

	Owner User name	=	Service Desk Team
AND	Priority	=	Critical
AND	Status	=	Not Closed

5. Enter a name of **All Open Critical** in the **Filter Name** field.
For example:

Custom View

To create a custom view, enter the search criteria and view name:

	[and/or] Owner User Name	▼	contains	▼	Service Desk Staff
AND	Status	▼	=	▼	Not Closed
AND	Priority	▼	=	▼	Critical
	CC List	▼	contains	▼	

Filter Name:

6. Click the **Test View** button to confirm the results.
7. If the Custom View returns the data you want, click the **Create View** button to save it.
If not, continue editing the Custom View until it displays the data you want.

Using the Software Library to distribute software and information

The **Service Desk Software Library** is a forum to for you to distribute software, scripts, or other self-help files and tools files to your users. It is intended for items that you frequently need to include in Service Desk tickets.

- [About the Software Library](#), on page 50
- [Creating Software Library items](#), on page 50
- [Using the Knowledge Base](#), on page 53

About the Software Library

You post software executables, scripts, other miscellaneous files to the **Service Desk > Software Library** to make them available to your users to download. There are two ways to distribute Software Library items:

- Service Desk personnel and administrators can attach Software Library items to Service Desk tickets for users to execute on their systems. Used this way it is a valuable resource for distributing your most needed software or scripts.
- Your users can use it as a “self service” tab and download Software Library items to their own systems.

You specify instructions for each Software Library item separately. You can for example, direct the software to execute or the scripts to run automatically.

You can limit user access to **Software Library** items using filters.

Like the other **Service Desk** features, you must first create and store user accounts on your appliance before your users can access the Software Library. As long as they have an account on the appliance, users can view the Software Library without a K1000 Management Appliance Agent installed on their machine. However, they can not be able to run installations or scripts.

You create or delete Software Library items from the **Software Library** tab.

Creating Software Library items

The **Software Library** tab allows you to make software packages available to your end users. You can also post cost information, documentation, or instructions for your users. Any notifications that you have configured are mailed at the time of user download.

The Software Library does not allow you to upload software or author scripts. Any software or scripts that you want to include in a software library must already exist in **Software Inventory** or **Scripting** tabs.

To create a Software Library item



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Go to **Service Desk > Software Library**.
2. In the **Choose action** menu, click **Add New Item**.
The Software Library : Edit Detail page appears.
3. Select or clear the **Enabled** check box.
Select this box to make the software library visible to users on the User Portal.
4. Select one of these **Package Types** to install.

Download	Select to create an item that downloads documentation, files, or other software that does not automatically install.
Install	To create an item that executes a software program on the user node. You choose from the programs available on the Inventory > Software tab. The user must have the agent installed to run installations.
Script	To create an item that runs a script on the user node. You choose from the scripts available on the Scripting > Scripts tab. The user must have the agent installed to run scripts.
Virtual Kontainer	Selecting this option introduces the VK Distribution Set drop-down menu. Use this to specify the Virtual Kontainer distribution set for installation.

5. If you selected the **Install** package type in step 4, enter the command line to run the installation, including any necessary install switches or parameters.
6. Specify the information to include with your package under the **User Portal Page Details** section:

Installation Instructions	Specify the installation instructions. Any defined instructions, legal policy, cost information, and so on, are posted along with the portal package for user visibility.
Product Key	Enter the product key. (See the Asset > Assets tab for Asset Detail license information).
E-mail Product Key to User	Select this option to send download instructions at the time of user download.
Request Manager Notification	Select this option to require users to enter their manager's mail address for notification before downloading or installing the software.
Additional Notes	(Optional) Enter any additional information.
Corporate License Text	(Optional) Enter any Corporate License text.
Vendor License Text	(Optional) Enter any Vendor License text.
Unit Cost	(Optional) Enter a cost per unit.
Documentation File	(Optional) Browse a documentation file to include. The Documentation File size is displayed after the file is selected.

7. Specify any distribution restrictions in the **Access Control** section:

Limit Access To User Labels	(Optional) Click Edit to select a label from the Limit Access To User Labels list to limit software library deployment to specific users.
Also Restrict By Machine Label	(Optional) Click the Also Restrict By Machine Label check box to restrict software library deployment by machine label.

8. Click **Save**.

To apply a label to a Software Library item



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Click **Service Desk > Software Library**.
2. Select the check box for the Software Library item to apply a label to.
3. In the **Choose Action** menu, click **Apply Label** and the label.
4. Click **Save**.

The label is listed next to the Software Library item in brackets.

To remove a label from a Software Library item



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Click **Service Desk > Software Library**.
2. Select the check box for the Software Library item to remove the label from.
3. In the **Choose Action** menu, click **Remove Label**.

To delete a Software Library item



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Click **Service Desk > Software Library**.
2. Click the check box for the Software Library item to delete.
3. In the **Choose Action** menu, click **Delete Selected Item(s)**.
4. Click **OK** to confirm deletion.

Using the Knowledge Base

The Service Desk **Knowledge Base** tab allows you to provide documentation, FAQs, or other self-help information for your users. You can also use the Knowledge base as a library of instructions for commonly-encountered problems, or answers to commonly-asked questions. You can insert Knowledge Base article text into tickets by using the **Find Related Articles** link on each ticket page.

Users can view the Knowledge Base articles through the User Interface and sort them by Article ID, Title, Category, Platform, or Importance. They can search article contents by using keywords.

To add Knowledge Base articles



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

Knowledge base articles are published to the K1000 Management Appliance Service Desk where users can search and sort articles to locate the information they require.

1. Click **Service Desk > Knowledge Base**.
2. In the **Choose Action** menu, click **Add New Item**.

The Knowledge Base: Edit Article page appears.

3. Enter the following article information:

Title	A specific description of the issue covered in the article. Make the title as descriptive as possible and use common terms so it is easy for a user to locate information.
Category	A general description of the type of issue. For example, “printing” or “network access.”
Platform	The operating systems to which this article applies.
Importance	The relative relevance of the article’s contents. (For example, “reference” or “low”; or “critical” or “high.”)
Use Markdown	<p>Select this box to allow both markdown and full HTML text.</p> <p>Markdown is a plain text formatting syntax, and a software tool, written in Perl, that converts plain text formatting to HTML. Markdown is a text-to-HTML filter; it translates an easy-to-read/easy-to-write structured text format into HTML. Markdown's text format is most similar to that of plain text email, and supports features such as headers, <i>*emphasis*</i>, code blocks, block quotes, and links.</p> <p>Examples of sample formatting if the Use Markdown check box is selected:</p> <p><i>*normal emphasis with asterisks*</i> = <i>normal emphasis with asterisks</i></p> <p>**strong emphasis with asterisks** = strong emphasis with asterisks</p> <p>For more information about markdown, see http://daringfireball.net/projects/markdown/</p>

Limit Access To User Labels	If you want to limit access to the article to specific sets of users, select the appropriate user labels from the list. If you leave this field empty, all users who have access to the User Interface will see this article.
Article Text	Enter any text about the article. Note: You can include external links to web pages by using href for that link. For example, <code>Visit Dell KACE!</code> You can include images by using src. For example, <code></code>

4. (Optional) Click **Browse** to add an attachment.
5. Click **Save**.

The K1000 Management Appliance assigns the article an Article ID and displays it on the Knowledge Base Articles List page.



You can also create a new Knowledge Base article from the comments in a Ticket by clicking the **Create KB article** button on the Ticket Detail page.



To see how the article appears to your users on the Service Desk, click on the article's title, and then click the User URL on the Edit Article page.

Editing and deleting Knowledge Base articles

You edit or delete articles from the **Knowledge Base** tab.

To edit an existing Knowledge Base article



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Click **Service Desk > Knowledge Base** tab.
2. Select the linked article title.
The Knowledge Base: Edit Article page appears.
3. Click the **Edit** link to update the article details.
4. Modify article details, and then click **Save**.

To delete a Knowledge Base article



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Click **Knowledge Base**, or click **Service Desk > Knowledge Base**.

2. Select the check box beside the article, and in the **Choose Action** menu, click **Delete Selected Item(s)**.
3. Click **OK** to confirm.

You can also delete articles from the **Edit Article** page.

Extending the Service Desk session timeout period

By default, the K1000 Management Appliance logs out all users after one hour of inactivity (*Session Timeout*). This time period is restarted every time you direct the appliance to interact with its server, such as reloading the current page, saving changes, or moving to a new page. If the Session Timeout period expires, any unsaved changes are lost, and you are presented with the K1000 Management Appliance login screen again.

The Session Timeout period applies to all K1000 Management Appliance interface screens. However, only the Service Desk screens have countdown timers to remind users of the time limit.

The K1000 Management Appliance **General Settings: Session Timeout** option controls this time period. See the *Administrator Guide* for instructions on changing this setting.

Creating Service Desk processes

Processes track major tasks that require multiple tickets to complete. If you have repeated major tasks or processes of this nature, you can save the process to use as a template. For example, a new hire process might require the following tickets:

- Facilities determines an office space and provides furniture.
- IT sets up phone service.
- IT acquires a computer and the appropriate software.
- IT sets up a network connection and provides a user name.
- Human Resources handles employment paperwork.

The child tickets in a process don't have to have the same owner, category, or due date. You can make specific selections for each task instead of one value that is best for most of the tickets in a process.

When you want to create a parent/child ticket relationship for a specific issue, see [Setting up parent/child ticket relationships](#), on page 82.

To add a new process



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Go to **Service Desk > Configuration > Processes**.

The Processes page appears.

2. Select **Choose Action >Add New Item** from the menu.

The queue's Service Desk Configuration page appears.

3. Specify the following information:

Name	Enter a name that describes the overall process, for example, New Hire, Employee Termination, Office Move.
Description	A description of the overall process.
Display to all Users	If you want to allow all of your users to see this process, leave selected. If you want to only let particular users to see it, clear the check box.
Enable	Click this check box to enable the process.

4. Click **Save**.



You need to create the parent ticket before you enable the process.

5. Click **Create Parent...** to create the parent ticket for the process.

6. If you have created queues, select the appropriate queue.

You can use different queues for the parent and child tickets.

If you don't have multiple queues, this selection isn't offered. If you are interested in dividing work into queues, see [Expanding your Service Desk by adding ticket queues](#), on page 59.

7. Complete the parent ticket on the New: Parent Ticket page.

Most entries are similar to regular tickets. You don't have to use the same category, owner, and so on with the parent as you use for the child tickets.

The **Due Date Offset** reflects when you need to have all related tasks completed, but this offset is not enforced on the child tickets.

8. If an Approver has been enabled on your Service Desk, you can require approval to open or close a ticket.

For information on requiring approvals, see [Requiring ticket approvers](#), on page 86.

The screenshot shows the 'Edit: Parent Ticket' form in the Service Desk interface. The form is titled 'Edit: Parent Ticket' and is part of the 'Service Desk' configuration. The 'Process' is set to 'New Hire'. The 'Title' field is 'New Hire' and is marked as '(required)'. The 'Impact' is '1 person can't work', 'Category' is 'Other', 'Status' is 'New', and 'Priority' is 'Medium'. The 'Owner' is 'Requisitions Team (Ticket C)' with a filter count of (5). The 'Machine' is 'Unassigned' with a filter count of (2). The 'Asset' is 'Unassigned' with a filter count of (20/418). The 'VIP?' is 'No'. The 'Location' is 'Mountain view' and is marked as '(required)'. The 'Call Back Number' is '650-555-5555' and is marked as '(required)'. The 'Due Date' is 'No Due Date'. The 'CC List' is 'None' and the 'Submitter' is 'Unassigned'. There is a checkbox for 'Owners only' which is currently unchecked. The 'KB article lookup' is 'Select article to append...' with a filter count of (1).

9. Click **Save & Create Child**.

10. On **Edit: Child Ticket** page, enter a title for the child ticket.

11. Leave **Stage** as 1.

If you create additional child tickets that need to be handled sequentially, you can change the **Stage** value on any ticket.

12. Continue making selections for the child ticket. The **Category**, **Owner**, and **Due Dates**, for example, can differ from the parent ticket.

13. Click **Save** or click **Save & Create Child** to create more child tickets.

To enable the process



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. When you have created the necessary child tickets, on the New Child Ticket page, click **Save and Process**.

You can also select the process by going to **Service Desk > Configuration > Processes**, and selecting the process name.

2. The **Process Configuration** page appears.
3. Click **Edit Mode** and click **Enabled**.
4. Click **Save**.

To delete a process



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.


1. Click **Service Desk > Configuration**.
2. On the Service Desk Settings: Control Panel page, select **Processes**.
3. On the Processes page, select the name of the process.
The Process Configuration page appears.
4. Click **Edit Mode**, and click **Delete**.
5. Click **OK** in the confirmation window.

To use a process



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

If processes are not already setup, add them. See [To add a new process](#), on page 55.

1. Go to **Service Desk > Tickets**, and click the  icon on the Tickets page.
2. On the New page, select a process.
3. Select the appropriate details and the date for your situation.

If the process has more than one stage, tickets at later stages are not created till the tickets at earlier stages are completed.

4. Click **Save**.

When a user files a ticket for a process, you can see the parent/child relationship in the ticket list:

<input type="checkbox"/>	Time Open	Title	Priority	Status	Submitter
<input type="checkbox"/>	3h 44m	New Hire Request Shirley Wright (parent)	Medium	New	User_1
<input type="checkbox"/>	3h 44m	HR paperwork (child)	Medium	New	User_1
<input type="checkbox"/>	3h 44m	Set computer (child)	Medium	New	User_1

Expanding your Service Desk by adding ticket queues

The steps you followed in [Chapter 1: Setting up Your K1000 Management Appliance Service Desk](#), starting on page 7, and [Chapter 2: Managing and Maintaining Your Service Desk](#), starting on page 39, created a single ticket *queue* in your Service Desk. Queues are listed on the **Service Desk Queues** page. Each queue is a self-contained set of Service Desk tickets, each with its own unique set of characteristics and settings, such as statuses, categories, and so on. In many cases, a single queue is all an organization requires to function effectively. Because queues cannot be copied or cloned, every queue requires additional administrative overhead. Two queues require twice the administration effort that one does.

You only need to add new queues of Service Desk tickets if:

- You have different sets of tickets with completely different needs. For example, if you use tickets for typical Service Desk tasks such as fixing computer problems, and you also use tickets to keep track of problems with your organization's fleet of automobiles. The data recorded and staff skills required for those two sets of tickets are different enough that you probably want to use separate queues for them.
- If your service desk staff are only assigned to a specific set of tickets. For example, if your organization has offices in different cities, and each location has a Service Desk Staff dedicated *solely* to that location, the administrative overhead of adding additional queues for each location may be worth it. If your Service Desk Staff works across those locations however, a single queue is probably sufficient.

You can add as many additional queues as your organization requires. For details on adding a queue, see [To set the default Service Desk queue](#), on page 61.

Managing multiple queues

You can choose to view all tickets in all of your queues. For details, see [To set the default Service Desk queue](#), on page 61.

You can move Service Desk tickets from one queue to another. For details, see [Moving Service Desk tickets from one queue to another](#), on page 63.



Queues cannot be copied.

To add a new queue



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.



If you expect to move Service Desk tickets from one queue to another, be sure to set up the queues with the same values (especially the CUSTOM fields). Otherwise, data from the old queue is altered to match the new queue.

1. Go to **Service Desk Configuration > Queues**.

The Service Desk Queues page appears.

2. Select **Choose Action Add New Item** from the menu.

The **New Queue** page appears.

3. Fill in the **Name**, **Email Address**, and **Alt. Email Address** for the new queue. See [Creating and configuring email accounts for your appliance](#), on page 29, for information on the email addresses to use.



Each new queue must use its own unique email addresses. The K1000 Management Appliance confirms this before allowing you to save the new queue.

4. You now need to setup your new queue the way you did during initial Service Desk setup in [Chapter 1: Setting up Your K1000 Management Appliance Service Desk](#), starting on page 7. This includes:
 - Picking a new group to own these tickets.
 - Creating new roles for the ticket owners.
 - Creating a new label for the ticket owners.
 - Configuring your ticket default settings, new fields, and email messages.

See [Chapter 1: Setting up Your K1000 Management Appliance Service Desk](#), starting on page 7 for details.

To delete a queue



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.



Be sure you want to delete the data in a queue, including associated tickets and processes, before you delete the queue. This action cannot be undone.

1. Click **Service Desk > Configuration > Queues**.
The Service Desk Queues page appears.
2. Click a queue name.
3. On the Service Desk Configuration page for the queue, click **Edit Mode**.
4. Click **Delete**.
5. In the confirmation window, click **OK**.

To set the default Service Desk queue



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

You must have more than one queue to set the default queue.

1. Click **Service Desk > Configuration > Settings**.
The Service Desk Settings page appears.
2. Click **Edit Mode**.
3. From the **Default Queue for All Queues View Field Labels** menu, select the queue that you want to be the default.
4. Click **Save Settings**.

To view tickets across all queues

1. Click **Service Desk > Tickets**.

The Service Desk Tickets page appears.

2. In the **View by** menu, click **All Queues**.

All tickets from all queues that you have permission to view appear in the Tickets page. To change layout of the fields, see [Chapter 3: Creating a custom ticket layout](#), starting on page 77.



The **Choose Action** and **View By** menus revert to their defaults. Any customizations that appear in individual queues are not available in the **All Queues** view.

To change the All Queues fields



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Click **Service Desk > Configuration**, and click **Settings**.

2. Click **Customize List Layout for All Queues View**.

The All Queues List Layout page appears.

You can add; delete; rename; reorder; and change the field width, that is, set the number of characters allotted for display.

3. Edit with the following options:

- Click to add a field.
- Click to change the field name or the amount of space allowed (in characters).
Service Desk doesn't check that the number of characters you enter is practical.
- Click to move the field up.
- Click to delete the field.

4. For each field you edit, click **Save** at the end of the row.

5. Click **Save** at the bottom of the page to make these changes take effect.

Moving Service Desk tickets from one queue to another



You can move a ticket from one queue to another, but if the two queues do not share settings and custom field values, the ticket content is altered to match the new queue.

If the ticket being moved has a status, impact, priority, or category setting that does not exist in the new queue, it gets the new queue's default values for those settings, and the original value is overwritten. The original values are, however, stored in the ticket change history.

If the ticket uses a custom field value that is not already defined in the new queue, the appliance adds it to the new queue's custom field list, which can cause confusion. For example, if:

- The CUSTOM_1 field in the ticket being moved lists the root cause of the problem as **Pilot Error**, and
- The CUSTOM_1 field in the target queue lists locations, such as **Tampa, Los Angeles, and Denver**,

The new CUSTOM_1 value is added to the list, which now includes: **Tampa, Los Angeles, Denver, and Pilot Error**.

To move a ticket from one queue to another



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Go to **Service Desk > Tickets**.
The Tickets page appears.
2. Select the check boxes for the tickets to move.
3. From the **Choose Action** menu, choose **Move to queue: newqueue**.
Your tickets now appear in the list of tickets for the *newqueue* that you selected.

Service Desk ticket rules

Ticket Rules allow you to run queries on your Service Desk tickets and act on the list of tickets returned. Your K1000 Management Appliance comes with four system ticket rules by default. You can add as many custom ticket rules as your organization requires.

Using and reconfiguring the system ticket rules

The system ticket rules are displayed on the **Service Desk > Configuration > Queues > queue_name > Service Desk Configuration** page.

System ticket rules are disabled by default:

System Ticket Rules:		
Rule	Description	Enabled
WaitingOverdue	Moves ticket into an overdue status when it has been waiting on a customer action for a period of time	no
OverdueClose	Closes ticket that has been in the overdue status with no response for a period of time	no
EmailOnClose	Emails customer when ticket is closed, reminding them that they only need to respond to reopen their ticket	no
CustomerResponded	Moves ticket to a responded status when customer responds to a ticket that was waiting customer action	no
ReopenTicket	Reopens closed ticket if someone other than the owner responds to it	no

Custom Ticket Rules: [\[Customize\]](#)

You can:

- Enable and use these rules as they are. To enable a rule, select it, and select the **Enabled** check box. Click **Save** at the bottom of the page.
- Select the **Custom Ticket Rules: Customize** link and reconfigure these rules as needed.
- Copy rules and modify them. To copy a rule, select it, and then select the **Duplicate** button at the bottom of the Rule Detail page that appears.
- Create your own completely new custom ticket rules. For instructions, see [To create a new custom ticket rule](#), on page 65.

Understanding and customizing the system ticket rules

This table lists the system ticket rules, lists their default behavior, and explains what else you can use them for:

Ticket Rule	Default Behavior	Can be copied and used to...
WaitingOverdue	Moves tickets that have been dormant for seven days to an Overdue status.	Change a ticket status after waiting for a configurable time period. You can also send an email message when the status change happens.
OverdueClose	Closes tickets that have been Overdue with no action for seven days.	
EmailOnClose	Sends an email message to the ticket submitter when their ticket is closed, reminding them that they only need to respond to reopen their ticket	Send an email message when a ticket is closed.
CustomerResponded	Moves ticket to a Responded status when a user responds to a ticket that has been waiting for customer action.	Change an open ticket's status and send an email message if it is updated.
ReopenTicket	Reopens a closed ticket if someone other than the owner responds to it.	If a closed ticket is reopened, this rule can change its status, and send an email message.

You can use the default tickets as they are, or duplicate and change them to meet your organization's needs. For information on duplicating ticket rules, see [To create a new custom ticket rule](#), on page 65. If you need entirely different behavior, see [To create a new custom ticket rule](#), on page 65.

Managing custom ticket rules

You can create, duplicate, and delete custom ticket rules.

To create a new custom ticket rule



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Go to **Service Desk > Configuration > Queues.**

The Service Desk Queues page appears.

2. Click:

- The default **The K1000 Help Desk** queue.
- Another queue if you define more than one (most implementations do not).

The Service Desk Configuration page appears.

3. Click the **Customize Ticket Rules: [Customize] link at the bottom of the page.**

The Ticket Rules page appears.

4. Select **Choose Action > Add Ticket Rule from the menu.**

The Ticket Rule page appears. The queue name is displayed in parentheses.

5. Enter criteria to choose the tickets to be affected.

6. Under **Define Ticket Rule, select an attribute from the drop-down list. For example, **Priority**.**

7. Select a condition from the drop-down list. For example, =.

8. Specify the attribute value. For example, **Medium.**

In the above example, tickets with medium priority will be searched.

Note: You can add more than one criteria.

9. Select the Conjunction Operator from the drop-down list to add more criteria. For example, **AND.**

10. Click **Test.**

The search results are displayed below.

11. Click **Next.**

12. Choose the values to change.

13. Under **Define Ticket Rule, select an attribute whose value you want to change, from the drop-down list. For example, **Priority**.**

14. Specify the new attribute value. For example, **High**.

The Priority of the tickets that were searched, will now be changed to high.

15. Click **Done**.

The Ticket Rule: Edit Detail page appears. You can configure settings for running the SQL query periodically and work with the resulting list of tickets.

16. Specify the following information:

Record Created	(Read only) The date and time when the Rule was first created.
Record Last Modified	(Read only) The date and time when the Rule was last modified.
Title	A name for the rule.
Order	A number specifying the evaluation order level. The rule is executed according to the evaluation order specified.
Queue	(Read only) The name of the queue the ticket belongs to.
Notes	Enter any notes about this rule.
Frequency	Select the appropriate frequency from the drop-down list. The rule is run based on the selected frequency.
Next Run	(Read only) The date and time when the rule is run next time.
Current Server Time	Displays the current server time.
Enabled	Click the check box to enable the ticket rule. Unless enabled, the ticket does not run.
Select Query	This SQL is generated by the Ticket Rule wizard from the inputs that you specified while searching for Tickets in the Ticket Rule page. This is a SQL SELECT statement that will return a set of ticket IDs to operate on. This query will be run based on the Frequency selected above. Select the View Ticket Search Results link to view the search results. Note: Do not manually edit the SQL statements generated by the Ticket Rule Wizard, without fully understanding the ramifications of doing so. You can easily write SQL that degrades the performance of your appliance.
Send query results to someone	Click this check box to send the results of the Select Query to email addresses that you specify. All columns returned by the Select Query are included in the email. Enter the email addresses in the Email text area using a comma-separated list.
Results are tickets, add a comment to each one	Click this check box to add a comment to each ticket returned by the Select Query. This is useful because the Update Query specified later may update a Ticket without logging that information. For example, add a message like Ticket Rule: Increase Priority to High triggered . This gives you an indication of what tickets have been changed. Enter your comments in the Comment text area.

<p>Send an email for each result row</p>	<p>Click this check box to send text to the email addresses returned by the Select Query. An email is sent to each email address returned by the Select Statement in the Email Column.</p> <p>Variables are evaluated in the subject line or body of the email. Strings such as \$title and \$due_date are replaced by the values in the TITLE and DUE_DATE columns respectively. Any column returned by the select statement can be replaced in that way.</p> <p>The SQL generated by the Ticket Rule Wizard supplies OWNER_EMAIL, SUBMITTER_EMAIL, and CC_LIST as possible values.</p> <p>Enter the subject in the Subject text field.</p> <p>Enter the email column name in the Email Column text field. For example, OWNER_EMAIL. Email is sent to each email address returned by the Select Statement in this Email Column.</p> <p>Enter an email message in the Email Body text area.</p>
<p>Run an update query, using the results from the one above</p>	<p>Click this check box to run a second database query using the results from Update Query field as input.</p> <p>Use this field to run an additional SQL UPDATE statement using the comma-separated list of tickets returned by the Select Query as input. Such that "update HD_TICKET set TITLE = 'changed' where HD_TICKET.ID in (<TICKET_IDS>)" turns into "update HD_TICKET set TITLE = 'changed' where HD_TICKET.ID in (1,2,3)"</p> <p>This SQL is generated by the Ticket Rule wizard from the input that you specified while changing the attribute values in the Ticket Rule page.</p> <p>Note: The Run Log will show a count of the changed rows. This may differ from the selected rows if the data was already set to the requested values. The update SQL generated by the Ticket Rule wizard does not update the ticket row if an incorrect value is entered for fields like Priority or Submitter.</p>
<p>Update Query</p>	<p>Use this field to update your query as needed.</p>
<p>Run Log</p>	<p>Each time the rule runs, the run log is updated with the last results of that execution. Any failures or errors are displayed.</p>

17. Click **Run Now** to immediately run the ticket rule.

18. Click **Save**.

To duplicate a custom ticket rule



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Go to **Service Desk > Configuration > Queues**.

The **Service Desk Queues** page appears.

2. Click one:

- The default **The K1000 Help Desk** queue.

- Another queue if you define more than one (most implementations do not).

The Service Desk Configuration page appears.

3. Select **Customize Ticket Rules: [Customize]** link at the bottom of the page.

The Ticket Rules page appears.

4. Select a ticket rule to open it.

5. Click the **Duplicate** button at the bottom of the page.

The Ticket Rules page appears, with the new rule listed. The default name is **Copy of original_rule**.

You can now make any necessary changes to the new rule. You will probably want to rename it to something more meaningful. For details on the various rule fields, see [To create a new custom ticket rule](#), on page 65.

To delete a custom ticket rule



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. To delete ticket rules, do one of the following:
 - From the Ticket rule List view, click the check box beside the ticket rule, then select **Delete Selected Item(s)** from the **Choose Action** menu.
 - From the **Ticket Rule : Edit Detail** page, click **Delete**.
2. Click **OK** to confirm.

To move a ticket rule from one queue to another



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

Available when you have more than one queue. If you want the rule in both queues, make a copy as in [To duplicate a custom ticket rule](#), on page 67.

1. Go to **Service Desk > Configuration > Queues**.
The Service Desk Queues page appears.
2. Click the queue that includes the rule you want to move.
The Service Desk Configuration page appears.
3. Click the **Customize Ticket Rules: [Customize]** link.
The Ticket Rules page appears.



Once you are on the Ticket Rules page, you can switch between queues with the **View By** menu.

4. Select the check box for the rule.

5. In the **Choose Action** menu, click **Move to Queue** and your queue.

The rule no longer appears for in the list of rules for the queue.

Running Service Desk reports

The K1000 Management Appliance provides a set of default reports you can run against Service Desk data. Each report is available in HTML, PDF, CSV, TXT, and XLS formats.

To view the list of reports, go to the **Reporting** component, and in the **View by** menu, click **HelpDesk**. The default K1000 Management Appliance Service Desk reports:

The screenshot shows the 'K1000 Reports' page in the Reporting component. The 'View by' dropdown is set to 'HelpDesk'. A 'Choose Action' dropdown is set to 'Found 22 reports.' The table below lists the reports and their available export formats.

Report	Generate Report	Category
<input type="checkbox"/> Closed Satisfaction Survey last 31 days by Owner	HTML PDF CSV TXT XLS	HelpDesk
<input type="checkbox"/> Closed Ticket Resolutions last 31 days by Owner	HTML PDF CSV TXT XLS	HelpDesk
<input type="checkbox"/> Closed Ticket Resolutions last 7 days by Owner	HTML PDF CSV TXT XLS	HelpDesk
<input type="checkbox"/> Closed Tickets last 31 days by Category	HTML PDF CSV TXT XLS	HelpDesk
<input type="checkbox"/> Closed Tickets last 31 days by Owner	HTML PDF CSV TXT XLS	HelpDesk
<input type="checkbox"/> Closed Tickets last 7 days by Owner	HTML PDF CSV TXT XLS	HelpDesk
<input type="checkbox"/> Escalated/Open Tickets by Owner	HTML PDF CSV TXT XLS	HelpDesk
<input type="checkbox"/> Open Tickets by Category	HTML PDF CSV TXT XLS	HelpDesk
<input type="checkbox"/> Open Tickets by Owner	HTML PDF CSV TXT XLS	HelpDesk
<input type="checkbox"/> Open Tickets last 7 days by Owner	HTML PDF CSV TXT XLS	HelpDesk
<input type="checkbox"/> Stalled Tickets by Owner	HTML PDF CSV TXT XLS	HelpDesk
<input type="checkbox"/> Stalled/Open Tickets by Category	HTML PDF CSV TXT XLS	HelpDesk
<input type="checkbox"/> Stalled/Open Tickets by Impact	HTML PDF CSV TXT XLS	HelpDesk
<input type="checkbox"/> Stalled/Open Tickets by Owner	HTML PDF CSV TXT XLS	HelpDesk
<input type="checkbox"/> Stalled/Open Tickets by Priority	HTML PDF CSV TXT XLS	HelpDesk
<input type="checkbox"/> Stalled/Open Tickets by Status	HTML PDF CSV TXT XLS	HelpDesk
<input type="checkbox"/> Stalled/Open Tickets with Due Date by Owner Only reports those tickets that have a due date set	HTML PDF CSV TXT XLS	HelpDesk
<input type="checkbox"/> Work Report Date Range - Long Notes Display Displays date, ticket #, technician and hours worked as a header above the Notes for a Work entry for 2006-04-01 thru 2006-07-01	HTML PDF CSV TXT XLS	HelpDesk
<input type="checkbox"/> Work Report last 31 days Reports all tickets with work logged on them for the last 31 days.	HTML PDF CSV TXT XLS	HelpDesk
<input type="checkbox"/> Work Report last 31 days - Customize Reports all tickets with work logged on them for the last 31 days. Example of filtering just those with a custom field set on them.	HTML PDF CSV TXT XLS	HelpDesk
<input type="checkbox"/> Work Report last 31 days - Long Notes Display Displays date, ticket #, technician and hours worked as a header above the Notes for a Work entry.	HTML PDF CSV TXT XLS	HelpDesk
<input type="checkbox"/> Work Report last 31 days by person Reports all people who logged work during the last 31 days. Display by person, then ticket and time.	HTML PDF CSV TXT XLS	HelpDesk

To run Service Desk reports



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

The Service Desk reports are under the name **HelpDesk**.

1. Click **Reporting**.

The K1000 Management Appliance Reports page appears.

2. In the **View by** menu, click **HelpDesk**.
3. Click the format type for the report you want to view.



If you need to create custom reports, see the *Administrator Guide* for information on using the Report Wizard.

Customizing Service Desk Tickets

This section explains how to customize the Service Desk tickets, including specifying new fields and settings, and configuring the 15 custom fields.

This chapter assumes that you followed the instructions in the previous chapters and have a Service Desk implementation up and running.

About Customizing Service Desk Tickets

This section explains the appliance tools used to customize your Service Desk tickets and explains how you can use them to meet your company's needs.



If you intend to move tickets from one queue to another, be sure to give all queues the same ticket customizations to avoid confusing or lost data. For details, see [Managing multiple queues](#), on page 59.

You use the Service Desk Customization page to specify:

- Service Desk ticket values, including Categories, Statuses, Priorities, and Impacts.
- Service Desk ticket field characteristics in the **Ticket Layout** section, including:
 - Field name.
 - Order displayed on the ticket.
 - Whether the field is required or not.
 - Who has permission to change the field.
- Custom field definitions in the **Custom Fields** section, including:
 - The field type (text, single select, or multi-select)
 - (If needed) define the acceptable values for the field.
 - Specify the default value for the field.

Creating and Changing Ticket Categories, Statuses, States, and Priorities



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

You can create or modify ticket Categories, Statuses, States, and Priorities using the **Service Desk Customization** page.

1. Click **Service Desk > Configuration > Queues.**

The Service Desk Queues page appears.

2. Click one:

- The default **The K1000 Help Desk** queue.
- Another queue if you define more than one (most implementations do not).

The Service Desk Configuration page appears.

3. In the **Ticket Defaults section, click **Customize These Values.****

The Service Desk Customization page appears:

Service Desk Customization

Category Values Displays/hides online help

Name	Default Owner	CC List	User Settable	
Software	Unassigned	none	true	[Pencil] [Trash]
Hardware	Unassigned	none	true	[Pencil] [Trash] [Add]
Network	Unassigned	none	true	[Pencil] [Trash] [Add]
Other	Unassigned	none	true	[Pencil] [Add]

Status Values

Name	State	
New	Stalled	[Pencil] [Trash] [Add]
Opened	Opened	[Pencil] [Trash] [Add]
Closed	Closed	[Pencil] [Trash] [Add]
Need More Info	Stalled	[Pencil] [Trash] [Add]

Add a new Value
 Reposition a Value
 Modify a Value
 Delete a Value

Creating new ticket categories

Your company probably requires more ticket categories and subcategories than the defaults provided. You add new ticket categories from the Service Desk Configuration page, in the **Ticket Defaults : [Customize These Values]** section.

Example ticket categories and their name syntax:

Example Ticket Category/ subcategory Name	Category Name Syntax
Hardware/Monitor/	Hardware :: Monitor
Hardware/Monitor/AceElectronics/V4500	Hardware :: Monitor :: AceElectronics :: V4500
Hardware/Monitor/AceElectronics/V4600	Hardware :: Monitor :: AceElectronics :: V4600
Software/Office	Software :: Office
Software/email	Software :: email

You can add as many new categories as you need, each with one or more optional sub-categories. Most customers use a two-tiered approach to categories by creating:

- Simple list that users can set. For example:
 - Hardware – Monitor
 - Software – Office
 - Software – email
- Detailed list that only Service Desk Staff can use. For example:
 - Hardware – Monitor – AceElectronics – V4500
 - Hardware – Monitor – AceElectronics – V4600

Each category has a **User Settable** check box. Click the box allows users to change the corresponding category. Clear the box to reserve it for your Service Desk Staff only. Your users will see these categories if selected by the Service Desk Team, even if they cannot set or change them.

To create new ticket categories and sub-categories



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Click Service Desk > Configuration > Queues.

The Service Desk Queues page appears.

2. Click one:



- The default **The K1000 Help Desk** queue.
- Another queue if you define more than one (most implementations do not).

The Service Desk Configuration page appears.

3. In the Ticket Defaults section, click Customize These Values.


4. In the Category Values area, click the + icon.

Editable fields appear for the new value.

Category Values 				
Name	Default Owner	CC List	User Settable	
Software	Unassigned	none	true	
Hardware	Unassigned	none	true	
Network	Unassigned	none	true	
Other	Unassigned	none	true	
<input type="text"/>	Unassigned 	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="button" value="Save"/> <input type="button" value="Cancel"/>

5. To create your new category, enter the following:

Name	Enter a name for your new category with the syntax: <i>Categoryname :: subcategory1 :: subcategory2 :: subcategory3</i> The subcategories are optional.
Default Owner	DefaultTicketOwners The ticket owner is automatically populated from the Category during ticket creation. However, it will not change thereafter. Therefore, if you switch an existing ticket to another Category with a different default owner, the owner of the ticket does not automatically switch.
CC List	Leave this blank. The CC List is not visible on a ticket; it is a behind-the-scenes value. Because DefaultTicketOwners is the default owner, all potential ticket owners will get email when a ticket is created.
User Settable	Select this check box so users see this category. Each category has a User Settable check box, which allows users to change this category. Clear the box to reserve it for your Service Desk Staff only. Your users see these categories even if they cannot change them.

6. (As needed) Use the  icon to change the order that categories are displayed in your list.

As needed: The  icon removes Category values.

You cannot remove Category values being used as the default ticket Category.



You also cannot remove Category values that are in use. Add a new Category first, then move tickets with the old Category to the new Category. Once the old Category is not being used, the trash can icon appears next to it and you can delete it.

7. Click **Save** to apply your changes.

To customize status values



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

To add, edit, or remove status values:

1. Click **Service Desk > Configuration > Queues**.

The Service Desk Queues page appears.

2. Click one:

- The default **The K1000 Help Desk** queue.
- Another queue if you define more than one (most implementations do not).

The Service Desk Configuration page appears.

3. In the **Ticket Defaults** section, click **Customize these Values**.

4. In the **Status Values** area, click the  icon beside a category value to modify it.

Editable fields appear for that value.

5. Edit the Status Values field:

Name	Enter the name for the value.
State	Indicates whether the ticket is open, closed, or stalled. <ul style="list-style-type: none"> • Opened - The ticket is active. Only this State can be escalated. See Understanding ticket escalation, on page 44, for details. • Closed - The ticket has been resolved • Stalled - The ticket is open past its due date, but is not in escalation.

6. Click **Save**.

7. As needed, click the  icon to remove a Status value.

You cannot remove Status values being used as the default Status value.



You also cannot remove Status values that are in use. Add a new Status first, then move tickets with the old Status to the new Status. Once the old Status is not being used, the trash can icon appears next to it and you can delete it.

To customize ticket priorities



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

Follow these steps to add, change, or remove Priorities:


1. Click **Service Desk > Configuration > Queues**.

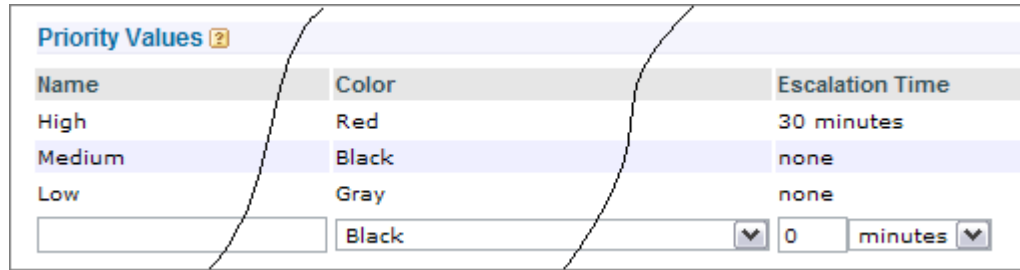
The Service Desk Queues page appears.

2. Click one:

- The default **The K1000 Help Desk** queue.
- Another queue if you define more than one (most implementations do not).

The Service Desk Configuration page appears.

- In the Ticket Defaults section, click **Customize these Values**.
The Service Desk Customization page appears.
- In the **Priority Values** area, click the  icon beside a category value to modify it.
Editable fields appear for that value:



Name	Color	Escalation Time
High	Red	30 minutes
Medium	Black	none
Low	Gray	none
<input type="text"/>	Black	<input type="text"/> 0 minutes

- Fill in the Priority Values fields:

Name	Enter a name for the custom field.
Color	(Optional) Select a color to use for this status on the ticket list pages.
Escalation Time	(Optional) Enter a time limit, after which an open ticket of this priority is escalated. Enter a time integer and a unit from the drop-down list. See Understanding ticket escalation for details.

You cannot remove Priority values being used as the default ticket Priority.



You also cannot remove Priority values that are in use. Add a new Priority first, then move tickets with the old Priority to the new Priority. Once the old Priority is not being used, the trash can icon appears next to it, and you can delete it.

- Click **Save**.
- As needed: Click the  icon to remove a Priority value.

To customize ticket impacts



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

Only ticket owners can categorize tickets using the Category and Priority values fields. Ticket submitters can make this type of assessment in the ticket Impacts field. You can change the default choices or create your own set of custom Impact values that ticket submitters can use to help assess a ticket's significance.

To add, change, or remove ticket impacts as required by your company:



- Click **Service Desk > Configuration > Queues**.
The Service Desk Queues page appears.
- Click one:

- The default **The K1000 Help Desk** queue.
- Another queue if you define more than one (most implementations do not).

The Service Desk Configuration page appears.

3. In the **Ticket Defaults** section, click **Customize These Values**.

The Service Desk Customization page appears.

4. In the **Impact Values** area, click the  icon beside an Impact value to modify it. Editable fields appear for that value.
5. Modify the **Name** field as desired.
6. Click **Save** to apply your changes.
7. As needed: Click the  icon to remove an Impact value.

You cannot remove Impact values being used as the default ticket Impact value.



You also cannot remove Impact values that are in use. Add a new Impact first, then move tickets with the old Impact to the new Impact. Once the old Impact is not being used, the trash can icon appears next to it and you can delete it.

Creating a custom ticket layout

You use the **Ticket Layout** section of the **Service Desk Customization** page to customize the way tickets are displayed in the Tickets tab for each queue. You can:






- Rearrange the order of the default fields or hide them.
- Use up to 15 custom fields for whatever your organization requires. You can specify static values for these fields, or pull the values out of a database dynamically using a database query.
- Tailor different ticket views and read/write access for users, ticket owners, and administrators. This includes the ability to hide, view, view but not change, or change individual ticket fields for each of these roles.
- Set up parent/child ticket relationships between tickets and either prohibit the parent from closing until all the child tickets are closed, or allow the parent ticket to close all the child tickets. For details, see [Setting up parent/child ticket relationships](#), on page 82.
- Prohibit a ticket from opening and closing without the approval of a designated approver. You can also require approval only at ticket closure. For details, see [Requiring ticket approvers](#), on page 86.

You make these changes by queue.



Changing field characteristics

You specify these ticket field characteristics using the **Service Desk > Configuration > queueName > Ticket Defaults : Customize These Values** selection:


- The name of the field.
- View order of the field.
- Whether the field is required for a ticket.
- Who can view and or change this field.

Ticket Layout 				
Name	Label	Required	Permissions	
SAT_SURVEY	Please tell us about your recent help desk experience...	Not Required	User Create	
TITLE	Title	Not Required	User Create	 
IMPACT	Impact	Not Required	User Create	 
CATEGORY	Category	Not Required	User Create	 

Click the:

-  icon to change the order in which a field appears on the ticket list.
-  icon to change the field characteristics, including hiding the field by setting the **Required** permission to **Hidden**.

Changing a field name (label)

You can rename the default or custom fields meet your organization's need by selecting the  icon and entering the new name in the Label column.



Remember that the changes you make here are automatically propagated to all existing tickets for this queue.

Requiring a field on all tickets

You have these options under the **Required** column for each field:

- Not Required.
- Always Required. Fields with this option must be filled out before a ticket can be saved and submitted.
- Required on Close. Fields with this option must be filled out before a ticket can be closed.

Setting permissions for creating and changing field values

The settings for limiting the types of users who are allowed to read, create, or edit a field are:

Fields with This Permission:	Can be Viewed by:	Can be Changed by:	Can be Created by:
Hidden	No one	No one	No one
Read Only	Users, Ticket Owners, Administrators*	No one	No one
Owners Only - Hidden from Users	Ticket Owners, Administrators*	Ticket Owners, Administrators*	Ticket Owners, Administrators*
Owners Only - Visible to Users	Users, Ticket Owners, Administrators*	Ticket Owners, Administrators*	Ticket Owners, Administrators*
User Create	Users, Ticket Owners, Administrators*	Ticket Owners, Administrators*	Users, Ticket Owners, Administrators*
User Modify	Users, Ticket Owners, Administrators*	Users, Ticket Owners, Administrators*	Users, Ticket Owners, Administrators*

*By default. If you clear the **Grant read/edit permissions to users with an Admin role (admin portal only)** box on the **Service Desk Configuration** page, Administrators do not have these permissions.



The Satisfaction Survey has slightly different meanings for these permissions. For details, see [About the Satisfaction Survey](#), on page 35.

Defining Custom Ticket Fields

You can add up to 15 custom fields to your Service Desk tickets. Add any new fields that your organization requires. Your Service Desk Staff is a good source for suggestions for additional information to help them to do their jobs.

Creating a custom field involves two areas of the Service Desk Customization page:

- The custom field characteristics using the **Custom Field** area.
- The custom field behavior in the **Ticket Layout**.

To create or modify a custom ticket field



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Click **Service Desk > Configuration > Queues**.

The Service Desk Queues page appears.

2. Click one:

- The default **The K1000 Help Desk** queue.
- Another queue if you define more than one (most implementations do not).

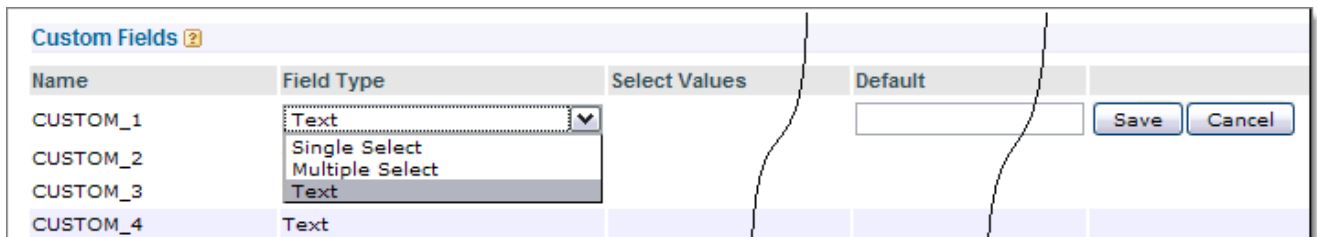
The Service Desk Configuration page appears.

3. Click **Customize Fields and Layout.**

The Service Desk Customization page appears.

4. In the **Custom Fields area, click the  icon to edit or create a field.**

The editable fields appear:

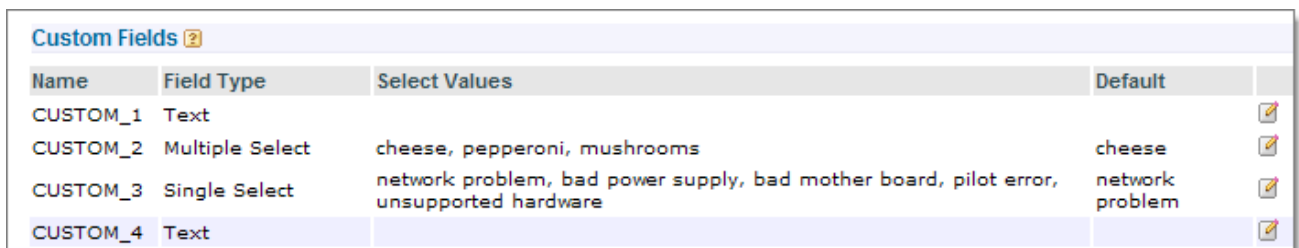


5. Select the field type from the **Field Type list.**

What kind of field type (text entry, or single or multiple select) to use in each field?

6. Fill in the **Select Values field with a list of allowed values.**

Select Values are used for custom fields with Field Type of Single Select or Multiple Select. Enter multiple values as comma-separated strings. For example:





You can use a database query to specify values for this field with the syntax:

query:*query_instructions*. Select the question mark icon next to **Custom Fields** to view an example.

7. Fill in a default value in the **Default field.**

This value is filled in by default when the ticket is created.

-  If you *remove* the name of a custom field, values for that field are removed from all tickets.
-  If you *rename* a custom field, values for that custom field are be retained.

You can use a database query to specify values for this field with the syntax:

query:*query_instructions*. Click the question mark icon next to **Custom Fields** to view an example.

8. Scroll up to the **Ticket Layout** area, and click the  icon next to the custom field you just configured.

The custom field behavior options become editable:

CUSTOM_1	<input type="text" value="none"/>	Not Required	Hidden
CUSTOM_2	<input type="text" value="none"/>	Not Required	Hidden
CUSTOM_3	<input type="text" value="none"/>	Not Required	Read Only
CUSTOM_4	<input type="text" value="none"/>	Not Required	Owners Only - Hidden from Users
CUSTOM_5	<input type="text" value="none"/>	Not Required	Owners Only - Visible to Users
			User Create
			User Modify

9. Enter a name in the **Label** field.
10. Set the required level in the **Required** field.

The options are:

- **Always Required.** The field must be filled in before the ticket can be saved.
- **Not Required.**
- **Required on Close.** The field must be filled in before the ticket can be closed.

11. Set permissions in the **Permissions** field.

The options are:

- **Hidden.**
- **Read Only.**
- **Owners Only – Hidden from Users.**
- **Owners Only – Visible to Users.**
- **User Create.** This also allows ticket owners to create or modify the field.
- **User Modify.** This also allows ticket owners to create or modify the field.

12. (Optional) Use the up arrow icon  to change the field location on the page.

13. Click **Save** for the custom field to save your **Ticket Layout** changes.

14. Scroll to the bottom of the page, and click **Save** to apply your changes to this page.

Your custom ticket changes are now available to your users and ticket owners.

Specifying the Ticket List Column Layout

Use the **Ticket Layout** section of the Service Desk Customization page to specify the names, view order (from left to right), and the ticket field widths for the list of tickets.

To change the ticket list or the layout



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Click **Service Desk > Configuration > Queues**.

The Service Desk Queues page appears.

2. Click one:





- The default **The K1000 Help Desk** queue.
- Another queue if you define more than one (most implementations do not).

The Service Desk Configuration page appears.

3. Click **Customize Fields and Layout**.

The Service Desk Customization page appears.

4. Customize the page using:

-  icon to change the order in which a fields appears.
-  icon to change the field to display, and the width allowed for the column.
-  icon to remove the field from the ticket list.
-  icon to add a new ticket field to the ticket layout.

5. Click the **Save** button at the bottom of the page.

Setting up parent/child ticket relationships

You can set up any Service Desk ticket as a *parent* ticket and assign *child* tickets to it. There are two ways to use the Dell KACE K1000 Management Appliance parent/child relationship: not allowing the parent to close unless all the child tickets are closed, and closing all child tickets by closing the parent.

- The first strategy uses the parent ticket as a sort of global todo list, and each child ticket as a separate task on the list. Once all the tasks are complete and the child tickets closed, then the parent can be closed.
- The second strategy uses the parent as the main collection point for duplicate problems. For example, if a server crashed and many users filed tickets about lost the server functionality. These child tickets are duplicates of the same problem and should all be closed as soon as the server is back online. In this case, designate all the tickets as child tickets of a single parent. When the problem is fixed, the ticket owner only needs to close the parent to close all of the child tickets.

Regardless of the strategy you choose, child tickets cannot be orphaned. That is, you cannot close the parent ticket before closing the child tickets.



You can create many levels of parent/child ticket relationships, but closing child tickets by closing their parent ticket only works for one parent/child level.

Enabling parent/child ticket relationships

This feature is disabled by default. To enable this feature, expose the PARENT_INFO ticket field, and make it writable by administrators. If you want to allow parents to close all child tickets, you also need to click the **Allow parents to close child tickets** check box in the queue configuration settings. Details on changing these settings are below:

To enable parent/child ticket relationships for a queue

1. Click **Service Desk > Configuration > Queues.**

The Service Desk Queues page appears.


2. Click one:

- The default **The K1000 Help Desk** queue.
- Another queue if you define more than one (most implementations do not).

The Service Desk Configuration page appears.

3. In the **Ticket Defaults section, click **Customize These Values.****

The Service Desk Customization page appears.

4. Scroll down to the **Ticket Layout section and select the  icon for the **PARENT_INFO** field to make changes to that field's settings.**

5. Select one of the **Owners Only permission settings:**

SUBMITTER	Submitter	Not Required	User Create	
APPROVAL_INFO	Approver	Not Required	Hidden	
PARENT_INFO	<input type="text" value="Parent Ticket"/>	Not Required	<div style="border: 1px solid black; padding: 2px;"> Hidden Hidden Read Only Owners Only - Hidden from Users Owners Only - Visible to Users User Create User Modify </div>	<input type="button" value="Save"/>
SEE_ALSO	See Also	Not Required		
REFERRERS	Referrers	Not Required		
RESOLUTION	Resolution	Not Required		

6. Click **Save next to the permissions field.**

7. Click **Save at the bottom of the page to make your change take effect.**

When you save these changes, ticket owners and administrators (by default) are able to make any ticket a child or parent.

To enable parent tickets to close child tickets



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

1. Click **Service Desk > Configuration > Queues.**

The Service Desk Queues page appears.

2. Click:

- The default **The K1000 Help Desk** queue, or
- Another queue if you define more than one (most implementations do not).

The Service Desk Configuration page appears.

3. Scroll to the bottom of the page and click **Edit mode.**

The page reappears with settings available to change.

4. Select the **Allow parent tickets to close child tickets** check box.
5. Scroll to the bottom of the page and click **Save**.

The change takes effect, and afterward when you attempt to close a parent ticket the appliance prompts you to first close any of its open child tickets.

To add a parent to a child ticket



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

Now that you have enabled tickets to become parents, you can set up parent/child relationships between tickets. You need to designate parent tickets before they can be associated with child tickets.

Each ticket now has a **Parent Ticket** field:

The screenshot shows the 'New Ticket' form in the Service Desk interface. The form is titled 'New Ticket' and 'The K1000 Service Desk'. It contains several fields: Title (Server is Down Again), Impact (1 person can't work), Category (Other), Status (New), Priority (Medium), Owner (Unassigned), Machine (Unassigned), Asset (Unassigned), Due Date (None), CC List (None), Submitter (admin), and Parent Ticket (Unassigned). The 'Parent Ticket' field is circled in red.

1. Click **Service Desk > Tickets**.
2. Click the **New** button.
The New Ticket page appears.
3. Click next to **Parent Ticket** to make the **Allow this to be a parent** check box visible.
4. Select the **Allow this to be a parent** check box to make this ticket a parent.
5. Click **Save & Create Child** at the bottom of the page to save the parent and automatically bring up a ticket template for the first child.

After you create the first child, the button changes to **Save & Create Another Child** for all subsequent child tickets. Use this button to create as many child tickets as required.

Once created, child tickets are visible from the parent ticket drop-down list on the parent ticket:

Submitter: admin

Parent Ticket: Unassigned Filter: (5)

- Unassigned
- TICK:0001 - Parent - Server is down
- TICK:0002 - Parent - Server is Down Again
- TICK:0006 - Parent - New Employee
- TICK:0007 - Set up Machine
- TICK:0010 - Parent - New Employee - John Doe

Status	Submitter	Owner
New	admin	Unassigned

Child tickets also display their parents in the **Parent Ticket:** field:

Created: May 29 2009 03:27:04 PM

Modified: May 29 2009 03:27:25 PM

Submitter: admin

Parent Ticket: TICK:0002 - Parent Ticket #1

See Also: None

Referrers: None

Resolution: None

Using a parent ticket as a todo list

The Service Desk parent/child ticket relationships work well in situations where you want to use the parent as a collection point for a variety of tasks to be performed by different people. For example, the setup tasks for a new employee. (If you anticipate a multi-phase task being a regularly repeated, consider making a process ticket. See [Creating Service Desk processes](#), on page 55.) Grouping all the necessary tasks under one parent ticket allow you to keep track of them from one point. To do this:

- Open a ticket to serve as the parent. Give it a title that is easy to identify and groups these tickets together. In this example: Parent - New Employee - John Doe.
- Open tickets for each of the tasks required for the list. For example, a list for new employee tasks:

Parent Ticket: Unassigned

Parent ticket with 3 child tickets.

[Show child tickets](#)

Ticket #	Title	Status	Submitter	Owner
TICK:0007	Set up Machine	New	admin	Unassigned
TICK:0008	Set up Phone	New	admin	Unassigned
TICK:0009	Set up HR Appt	New	admin	Unassigned

- The **Show child tickets** list shows you the status of all the tasks required. When the last task is close, you are prompted to close the parent ticket.



You must follow the instructions in the [Enabling parent/child ticket relationships](#), on page 82, and [To enable parent tickets to close child tickets](#), on page 83, to set up parent/child relationships.

To use parents to organize duplicate tickets



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

The Service Desk parent/child ticket relationship can help resolve multiple tickets filed for the same problem. For example, a server crash can trigger multiple tickets for the same problem. In such a case:

1. Make sure that the ticket queue in question allows parents to close child tickets.
For details, see [To enable parent tickets to close child tickets](#), on page 83.
2. Designate one of the tickets as a parent.
3. Make the rest of the duplicate tickets child tickets:
 - a. Click **Service Desk > Tickets**.
 - b. Select all of the tickets you want to make child tickets
 - c. In the **Choose Action** menu, click **Add to Parent**.
4. Once the problem is corrected, close the parent ticket (which automatically closes the child tickets).



You must follow the instructions in [Enabling parent/child ticket relationships](#), on page 82, and [To enable parent tickets to close child tickets](#), on page 83, to set up parent/child relationships.

Requiring ticket approvers

You can require that a person or group approve a ticket before it can be opened and closed. You can also require approvers only to close a ticket. You set up the approval mechanism by:

- Creating a label to specify approvers.
- Adding users (approvers) to the label.
- Configuring the APPROVAL_INFO ticket field to require this feature.

You choose approvers from the list of *all* users regardless of queue, so they are not limited to a single queue.

Your approvers only have access to the **Approval:** and **Approval Note:** fields on a ticket:

Submitter: Unassigned
 Approver: Unassigned Filter: (11)
 Approval required before:
 Resolution: None
 Owners only:

The **Approval** field offers approvers these options:

- Approved
- Rejected
- More Information Needed

Once set up, ticket approvers are offered **Approval** and **Approval Note** fields on each ticket. The **Approval:** field must be set before the ticket can be opened or closed. The **Approval Note:** field is optional.

Approvers can see all of the tickets they need to approve by navigating to the **Service Desk > Tickets** page, and clicking **View By > Owner**.

The **Approval:** field offers these options:

Approver: admin - Approval required before Close (required)
 Approval:
 Approval Note:

Setting up approvals for tickets

This section assumes that you already followed the instructions in [Chapter 1: Setting up Your K1000 Management Appliance Service Desk](#), starting on page 7, and have a Service Desk implementation set up and working.



The default Service Desk approval mechanism defines whether an approver is required for a ticket. The approver is not required to act on the ticket by default.

Follow these steps to:

- Create a label that offers a list of approvers for each ticket. You can then add or remove users from the label to grant or withhold permission for them to act as approvers.
- Require that an approver be specified before a ticket can be closed.

To require approvals



To perform these steps, be sure to select your organization in the **Organization** drop-down list in the top-right hand corner of the page.

You can add new users and new labels on the **Service Desk > Users** tab.

1. Click **Service Desk > Users**.
The Users page appears showing your users.
2. Click the check boxes for the user names you want to add.
3. In the **Choose Action** menu, click **Add Label**.
4. In the Add Label window, enter a name for the label, for example, **Ticket Approvers**, and click **Save**.




Avoid using a backslash (\) in Label names. If used, be sure to escape the backslash with another backslash.

Example of user with labels:

Users	
Choose action...	Found 2 users.
<input type="checkbox"/> User Name ↓	Full Name
<input type="checkbox"/> admin	admin
<input type="checkbox"/> RayJ [Ticket Approvers]	Ray Johnson

5. Click **Service Desk > Configuration > Queues**.
The Service Desk Queues page appears.
6. Click one:
 - The default **The K1000 Help Desk** queue.
 - Another queue if you define more than one (most implementations do not).
 The Service Desk Configuration page appears.
7. Confirm that the **Allow all users as approvers** check box is *cleared*.
If it is selected:
 - a. Scroll to the bottom of the page.
 - b. Click **Edit Mode**, and clear this box.
 - c. Click **Save**.
8. In the Ticket Defaults section, click **Customize These Values**.
The Service Desk Customization page appears.

9. Scroll down to the **Ticket Layout** section.
10. Click the  icon for the **APPROVAL_INFO** field.

The editable **APPROVAL_INFO** fields appear:

SUBMITTER	Submitter	Not Required	User Create
APPROVAL_INFO	Approver	Not Required	Hidden
PARENT_INFO	Parent Ticket	Not Required	Owners Only - Visible to Users
SEE_ALSO	See Also	Required on Close	Owners Only - Hidden from Users

11. In the **Label** field, enter the name of the label you created for approvers in step 4.
12. Select **Required on close** in the **Required** column.

Selecting **Required on close** or **Always Required** “turns on” the approval requirement for all tickets in this queue. Once one of these is set, a ticket must have an approver specified before it can be worked on or closed, depending on the option you choose.

13. Select an option in the Permission column.

Owners Only - Hidden from Users option is common, but pick the option that your organization requires. The options are:

SUBMITTER	Submitter	Not Required	User Create
APPROVAL_INFO	Approver	Not Required	Hidden
PARENT_INFO	Parent Ticket	Not Required	Hidden
SEE_ALSO	See Also	Not Required	Read Only
REFERRERS	Referrers	Not Required	Owners Only - Hidden from Users
RESOLUTION	Resolution	Not Required	Owners Only - Visible to Users
			User Create
			User Modify

14. Click the **Save** button opposite the **APPROVAL_INFO** field.
15. Scroll to the bottom of the page, and click **Save**.

The Approval feature is now turned on, and the approval options you selected apply to this queue.

Approving tickets by email

Once ticket approval is configured, the designated ticket approver can use an email message to approve a ticket, add an approval note, or designate a different approver. For details on changing tickets by email, see [Creating and updating tickets by email](#), on page 42. For a list of the fields used to change the approval fields, see [Changing ticket approval fields using email](#), on page 44.

Using an SMTP Email Server

The instructions in [Chapter 1: Setting up Your K1000 Management Appliance Service Desk](#), starting on page 7 explain how to set up a K1000 Management Appliance Service Desk that uses a POP3 email server to exchange email with your users. This appendix explains how to configure your Service Desk to exchange email using an SMTP email server. This appendix provides specific instructions for configuring a Microsoft® Exchange Email Server®, and general guidance for other email servers.

This appendix assumes that you have already followed the instructions in [Chapter 1: Setting up Your K1000 Management Appliance Service Desk](#), starting on page 7 and are ready to configure your system's email.

Sending email to the K1000 Management Appliance

This section explains the steps necessary for your Service Desk to receive email from and SMTP email server.

Connect the SMTP server to your email server

The process for doing this depends entirely upon your company's email configuration. If you are using Microsoft Exchange Server 2007, also refer to the Microsoft documentation on transport rules. The steps for other email servers are similar.

1. Open the Exchange Server Manager.
2. If necessary, create a Virtual SMTP server.
This is not necessary if you have an SMTP server.
3. Create a Virtual SMTP Connector called **K1000_HelpDesk**.
See your Microsoft Exchange Server documentation for instructions.
4. Click **Administrative Groups > Connectors > K1000_HelpDesk**.
The **K1000_HelpDesk Properties** window appears. The interface might vary depending on your implementation.
5. Click the **General** tab.
6. Click **Use DNS to route each address space on this connector**.
The **Local Bridgeheads** section becomes available.

7. Complete the **Local Bridgeheads** section:

Server	Virtual Server
<i>your_exchange_servername</i>	Default SMTP Virtual Server

8. Click the **Address Space** tab.
9. Click **Add** to add a new address space for the K1000 Management Appliance SMTP server. Use these settings:
- Type:** SMTP
- Address:** Enter the fully qualified K1000 Management Appliance server name. The syntax is `k1000.mydomain.com`
- Cost:** Set this to one level above the other connectors. That way, K1000 Management Appliance mail is filtered first, and no K1000 Management Appliance mail inadvertently leaves the network.
10. Under **Connector scope**, click **Entire organization**.
11. Leave **Allow messages to be relayed to these domains** turned off.
12. Click **OK** to save and close the K1000_HelpDesk Properties window.

The K1000 Management Appliance SMTP server is now connected to your email server. Follow the instructions in the next section to set up the email as trusted.

Configuring your email server

Follow the steps in this section to finish setting up email communication with your K1000 Management Appliance Service Desk.

Deciding whether to use the internal SMTP server

Your K1000 Management Appliance comes with an internal SMTP server, which you have the option to use. Whether to use it is a decision that your staff email authority must answer based on how the rest of your email system is set up.

If all of your mail must go through a specific server, direct the K1000 Management Appliance to use it. If most of the email traffic is from and to your Service Desk Staff, then it might make sense to use the K1000 Management Appliance server.

Both procedures are explained below. Pick one and follow those instructions to complete the Service Desk setup

To use an external SMTP server

Perform either this procedure or [Using the internal SMTP server](#), on page 93.

Configure your SMTP server's anonymous relay to connect to the K1000 Management Appliance.

1. Confirm that your external router and firewall allow the K1000 Management Appliance to use port 25 to send mail.

2. Click **Organization: System > Settings > Network Settings**.
The K1000 Network Settings page appears.
3. Click **Edit Mode**.
4. In the Network Server Options section, select the **Use SMTP server** check box.
The **SMTP Server** box appears.
5. Enter the IP address or name of the external SMTP sever to use.
6. Click **Save**.
7. Reboot your K1000 Management Appliance to make the changes take effect.
When you next start the K1000 Management Appliance, it is ready to forward email to the designated SMTP server.

Using the internal SMTP server

Perform either this procedure or [To use an external SMTP server](#), on page 92.

Your K1000 Management Appliance is set by default to use its internal SMTP email server. The SMTP server is always on and listening, by default. To confirm that the **SMTP Server** check box (for an external server) is cleared, follow these steps:

1. Click **Organization: System > Settings > Network Settings**.
The K1000 Network Settings page appears.
2. Click **Edit Mode**.
3. In the Network Server Options section, clear the **Use SMTP Server** check box.
This setting refers to an *external* SMTP server.
4. Click **Save**.
5. Reboot your K1000 Management Appliance to make the changes take effect.

When you next start the K1000 Management Appliance, the internal SMTP server is set to process outgoing email.

Testing and Troubleshooting Email Communication

The steps in this appendix explain how to ensure that your Service Desk email communication is working correctly.

This appendix assumes that you have followed the instructions in [Chapter 1: Setting up Your K1000 Management Appliance Service Desk](#), starting on page 7 and have set up a Service Desk that uses a POP3 email server to communicate with the K1000 Management Appliance.

Testing outgoing email

1. Depending on your appliance model, go to the Administrator Interface and click



The K1000 Settings: Dell KACE Support window appears.

2. Click **Troubleshooting Tools**.

The troubleshooting page appears.

3. Click **Edit Mode**.

4. In Network Utilities, select **email sending** and enter a valid email address.

A log of the email's path is displayed.

5. Check the log file carefully for errors.

If no errors are reported, the outgoing email was successfully sent and you are finished.

In the event of an error:

- Check your mail and spam filters.
- Check your K1000 Management Appliance network settings. If you are using your own SMTP server, the K1000 Management Appliance will be relaying mail through it. Many SMTP servers require specific permission to do this. Add your K1000 Management Appliance IP address to the list of acceptable servers.
- Check your router settings. Make sure the K1000 Management Appliance can use the SMTP port (25).
- Check your firewall settings. Make sure the K1000 Management Appliance can use the SMTP port (25).
- Call Support if you still cannot resolve the problem.

To test incoming email

The simplest test is to:

1. Log on to your SMTP server, and send the K1000 Management Appliance email creating a new Service Desk ticket.
2. Click **Service Desk > Tickets**, and confirm that a new ticket appears.

As long as you send mail from a valid K1000 Management Appliance account, a ticket is created automatically.

To debug incoming email

You can use **telnet** communicate with the K1000 Management Appliance SMTP server and send a test mail.

1. Enter the following commands.

(These start communication, tell the server who the received message is from, tell the server who the message is to, prepare to send data, and quit **telnet**.)

```
>telnet k1000.mydomain.com 25
>EHLO mydomain.com
>MAIL FROM:<admin@mydomain.com>
>RCPT TO:<helpdesk@k1000.mydomain.com
>DATA
>Test data here
>QUIT
.
```

2. Check the Service Desk mail box to confirm that you have received email from **admin@mydomain.com**.

To read the logs for error information

1. In Microsoft Exchange Server, open the SMTP Virtual Server Properties window.
2. On the **General** tab, make sure that the Enable Logging box is checked.
If not, click this box, and send some test email to the K1000 Management Appliance.
3. Go to the K1000 Management Appliance Administrator Interface **Organizations : System**.

4. Click the  icon.

5. Click **Logs**.

The K1000 Server Logs page appears.

6. Select a log from the **Current log:** drop-down list.
7. Examine the `exim_mainlong_*` and `exim_paniclog_*` files for problems such as:

- Errors and unsuccessful steps.
 - Hostnames and other variables not fully resolved.
8. Examine the `Debug_*` log for any other exim problems such as runaway exim processes.
 9. These other logs may also provide useful clues to the problem:
 - `Kkhelpdeskmailhandler_output`
 - `khelpdeskmailnotifier_error`
 - `khelpdeskmailnotifier_output`
 10. Examine the Microsoft Exchange SMTP service logs in `C:\windows\system32\oLogFiles*SMTP` for problems.

Typical Email Errors and Solutions

These are typical email errors and solutions for you to try:

Error: **550 Unknown user**

Fixes:

- Make sure that the address is spelled correctly.
- The address matches the address used by Service Desk.
- Try turning off the external SMTP server and remove the address from the network settings. Reboot. Then restore the address. Reboot again. This is surprisingly successful.

Error: **451 error - unable to verify sender**

Fixes:

- Check your DNS settings.

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