Version 12.0

Administrator Help Files

HelpDesk

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The eHD Application

Installing eHD

You should have received your GroupLink *everything* HelpDesk license via email.
The default Username and Password for the Administrator account is

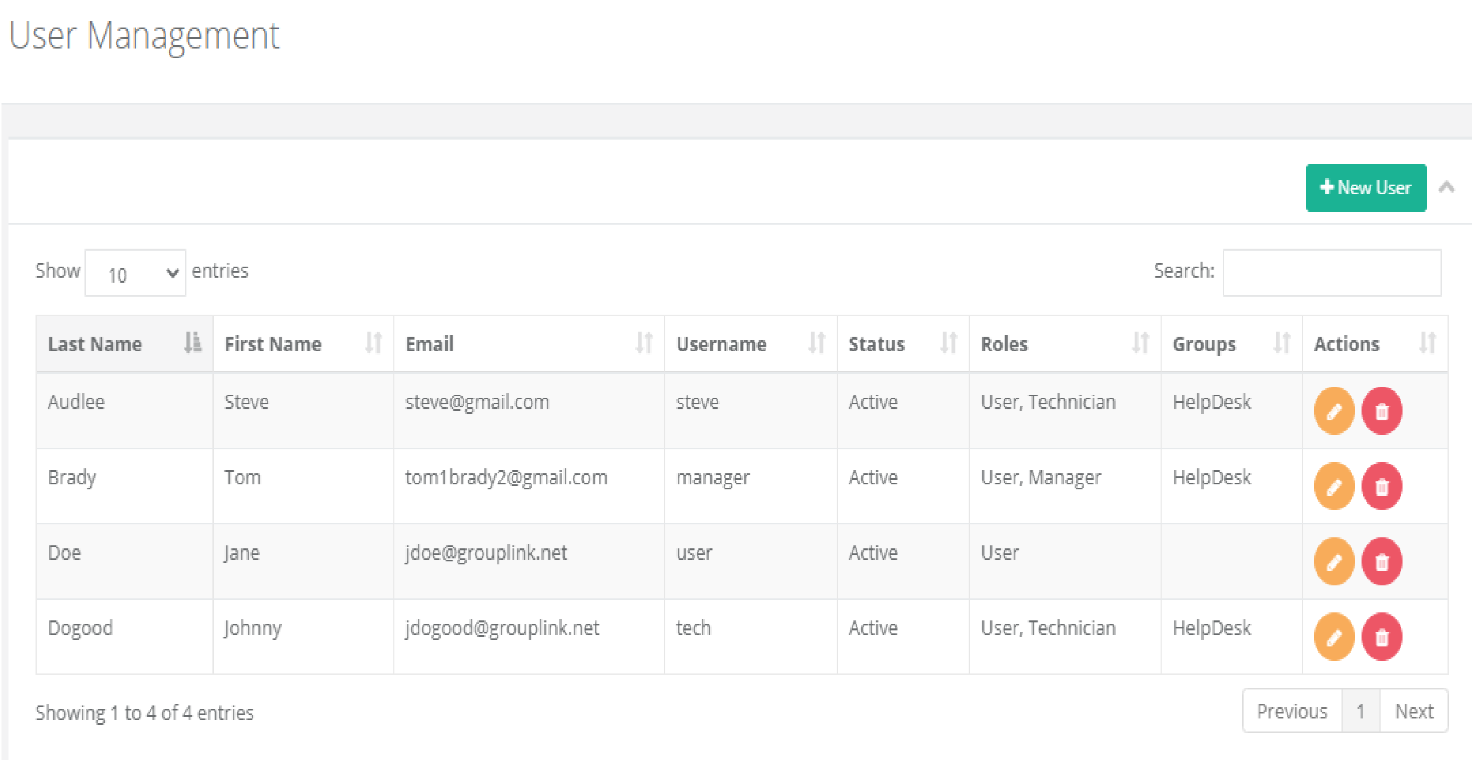
- **Username:** admin
- **Password:** admin

To change the Administrator Username and/or Password, click the SYSTEM ADMIN button in the upper, right-hand corner of the screen to open the User Account window.

User Account

The top left corner of the *e*HD screen will display SYSTEM ADMIN. Below it, are the menu's where you can find GLOBAL under category option of ADMIN, click GLOBAL then click User Accounts, then the window (***Figure 1***) will pop up. This will show the USER MANAGEMENT area.

Figure 1


User Management

+ New User

Show 10 entries Search:

Last Name	First Name	Email	Username	Status	Roles	Groups	Actions
Audlee	Steve	steve@gmail.com	steve	Active	User, Technician	HelpDesk	
Brady	Tom	tom1brady2@gmail.com	manager	Active	User, Manager	HelpDesk	
Doe	Jane	jdoe@grouplink.net	user	Active	User		
Dogood	Johnny	jdogood@grouplink.net	tech	Active	User, Technician	HelpDesk	

Showing 1 to 4 of 4 entries Previous 1 Next

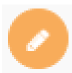
- The first section consists of the Administrator’s display name, email address, and login information. The email address entered here will be the primary email address used in the application. The Admin password can be reset or changed here.

    - Click the Change Password link under Login Id
    - Enter a new password that can easily be remembered by your System Administrator
    - Re-enter the password for security
    - Click the Save Changes button to save the new password

- The Phones section lists all phone numbers associated with the Administrator.

Click to add a phone number


Click to delete a phone number


Click to edit a phone number

- The Addresses section lists all addresses associated with the Administrator.

Click to add an address


Click to delete an address

- The Group Roles section will also be blank as the Administrator will have no other roles within the application.

Logging In

- Go to your support Login page. The URL for this page will vary depending on the web address designated in the HelpDesk system.
- Enter your **Login ID** and **Password**.

Note: If a user does not already have a Login ID and Password, they can click the **New user? Register Here** link on the main screen. However, the New User link will not appear if your organization uses LDAP integration.

- To change your password after initial login, click on your username in the upper right-hand corner of the **HelpDesk** screen. Your user account will pop up with your information.
  Click the Change Password link under Login Id.
  Enter a new password. For security reasons, this password is hidden.
  Click the Save Changes button to save the new password.

- If you have forgotten your password, click the **Forgot your password?** link on the support login page. It will then prompt you to enter the email address you used to set up your **Help-Desk Administrator** account. Enter your email address in the text field and click the **Reset Password** button. An email will be sent to your inbox with a new password. Return to the support login page and enter your username and temporary password. Once you have logged in, click on your username in the upper left-hand corner of the screen and reset your password.

The *e*HD Menu

The *everything* HelpDesk displays a menu on the left side of the application. The following options are shown in the menu:

- **New Ticket** will open a blank ticket for you to fill out. This is discussed in more detail in the **Creating a Ticket** section.
- **Search** will take you to the Ticket Filter screen where you can search tickets by creating a new filter. For more information, see the **Search** section.
- **Filters** will take you to the Filters management page where you can apply, edit, or delete Ticket Filters. For more information, see the **Filters** section.
- **Reports** directs you to the Reports management page where you can view, edit, or delete Reports. For more information, see the **Reports** section.
- **Assets** tab will appear only when you have set up the *e*HD internal Asset Tracker. When clicked, this tab will take you to the **List Assets** page which will be discussed later in the Help Files.
- **Knowledgebase** will take you to the Knowledgebase screen where you can access public Knowledgebase articles on different topics. For more information, see the **Knowledgebase** section.
- **Dashboards** will take you to the Dashboards page where they can be added, modified, or deleted. Further information can be found in the **Dashboards** section.
- **Templates** will take you to the Ticket Templates page. This page is discussed in the **Ticket Templates** section of the Help Files.

At the top of the application is a toolbar for a quick Ticket Search. To find a Ticket, enter the Ticket number, Location, Group, Category, Category Option, Subject, Note, History Subject, or History Note in the text field and click the search icon to the right or simply press enter. This will bring up the desired Ticket(s) to be viewed or modified.
On the far right are four additional buttons:

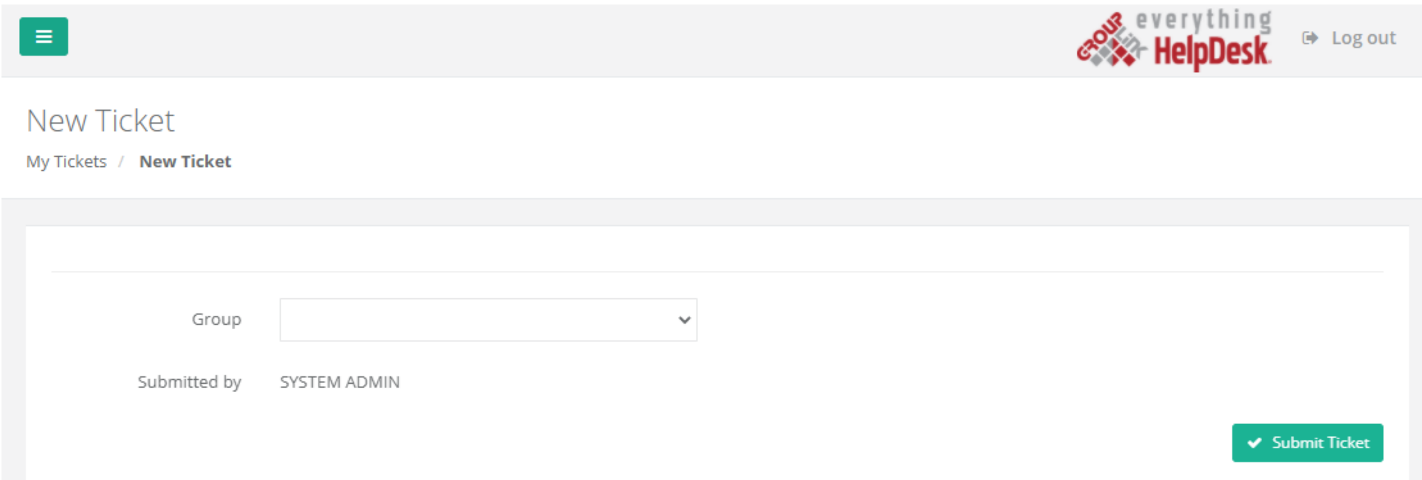
- The **SYSTEM ADMIN** button, when pressed, will open the Admin User Account page. This was discussed in the **User Account** section above.
- The **Help** button will open the Help Files in a PDF format with a navigable Table of Contents.
- The **Settings** button will be used to configure your help desk system.
- The **Sign out** button will sign you out of the *e*HD application and should always be used before you close your web browser.

The current version of *e*HD is displayed when putting your curser over the version number at the bot-tom of the page.

New Ticket

Once you have logged into the *e*HD system, click the **New Ticket** button located in the menu. A New Ticket window will appear. Click the down arrow to select the appropriate group. The New Ticket is broken into three sections: Contact Information, Ticket Info, and Description (***Figure 2***).

Figure 2



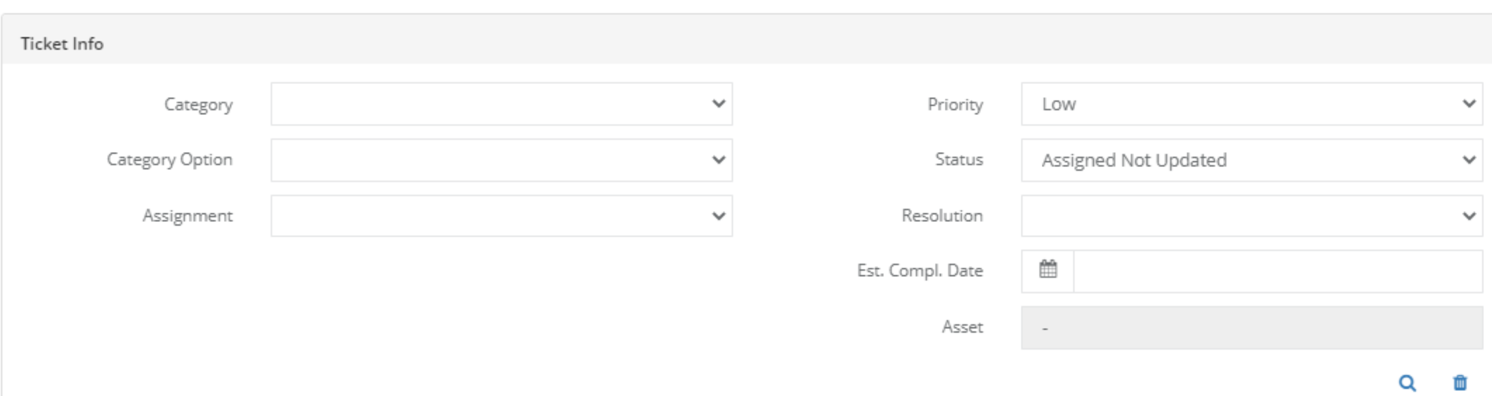
Contact Information

In the New Ticket window, your **Contact Information** is already filled in with the information in your User Account page including an email address link that, when clicked, will open a blank email to the given Contact. If you are submitting the Ticket for another user in your organization, you can select that user from the Contact drop-down list or use the text field as a google-like search to change the Contact.

Ticket Information

You must fill in the Ticket Info (***Figure 3***) in order. Location has now been decoupled from the flow. After Location, the drop-down options for each category pre-determine which option(s) will appear in the drop-down for the next category.

Figure 3

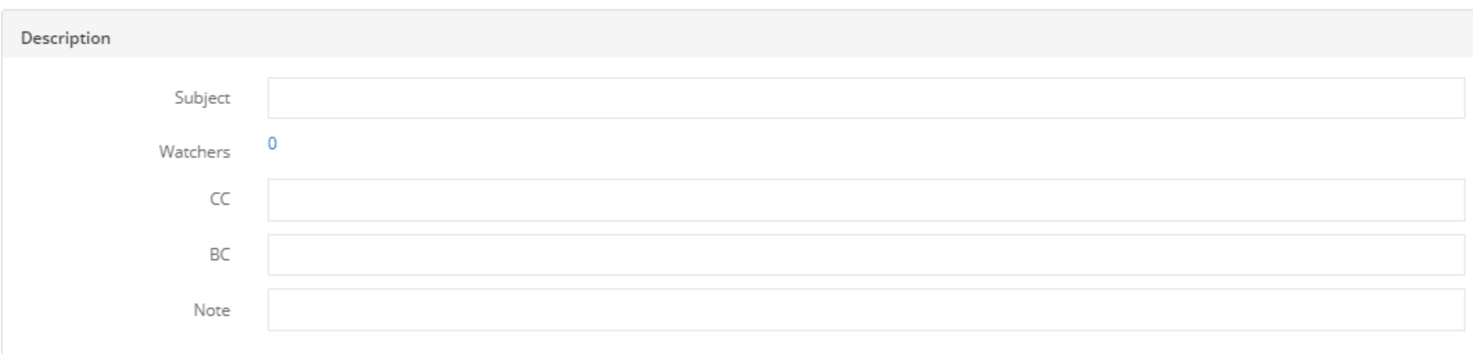


- **Location**: The Location will automatically appear based on the selected Contact's information but can also be changed if needed.
- **Category**, **Category Option**, and **Assignment**: Choose the appropriate options that apply to your problem from the drop-down lists for these three categories. Note that if there is only one option in the drop-down list, the name will be selected automatically for you.
- **Priority**: Give the new ticket a Priority based on the immediacy of the issue. The default Priority is **Low** unless otherwise set in your database.
- **Status**: Select the status of the ticket based on what has or has not been done regarding the issue. The default Status is **Assigned Not Updated** unless otherwise set in your database.
- **Est. Comp. Date**: When this field is clicked, a date picker will appear giving you the option to select a date when you hope to have this issue resolved.
- **Asset:** If the Internal Asset Tracker or ZENworks Asset Tracker are set up for your organization, a search icon will appear to search for assets to be tied to the ticket.
- Other options can be added to the Ticket Info section as they are needed for your company or department. Fill in any other categories that have an asterisk (*) next to their name.

Description

Fill out the **Subject** and **Note** (***Figure 4***) as you would an email. Give a short title to your problem in the Subject line, and then describe your problem in detail in the Note text box.

Figure 4

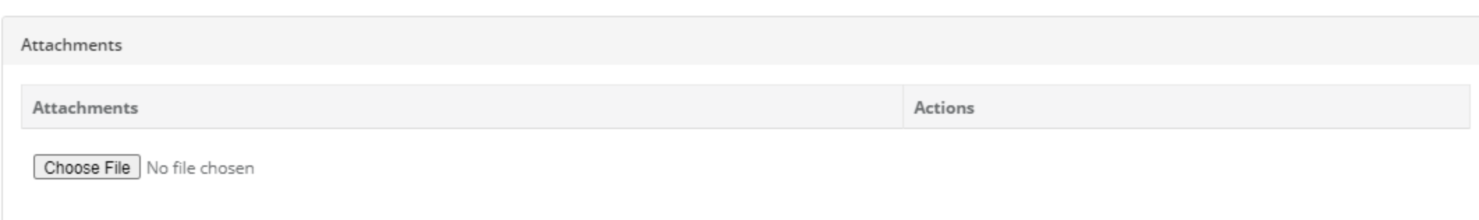


Be sure that you have filled in every required field (*). If required fields are not filled out, the Ticket will not save.

Once you have filled in all the relevant information, click **Submit Ticket**. This will submit your ticket which will now appear in the **Owned by me** tab in the My Tickets screen.

You can attach a relevant file **(*Figure 5)*** to your ticket by clicking **Browse**. Doing this will launch a pop-up window where you can navigate to files on your computer.

Figure 5

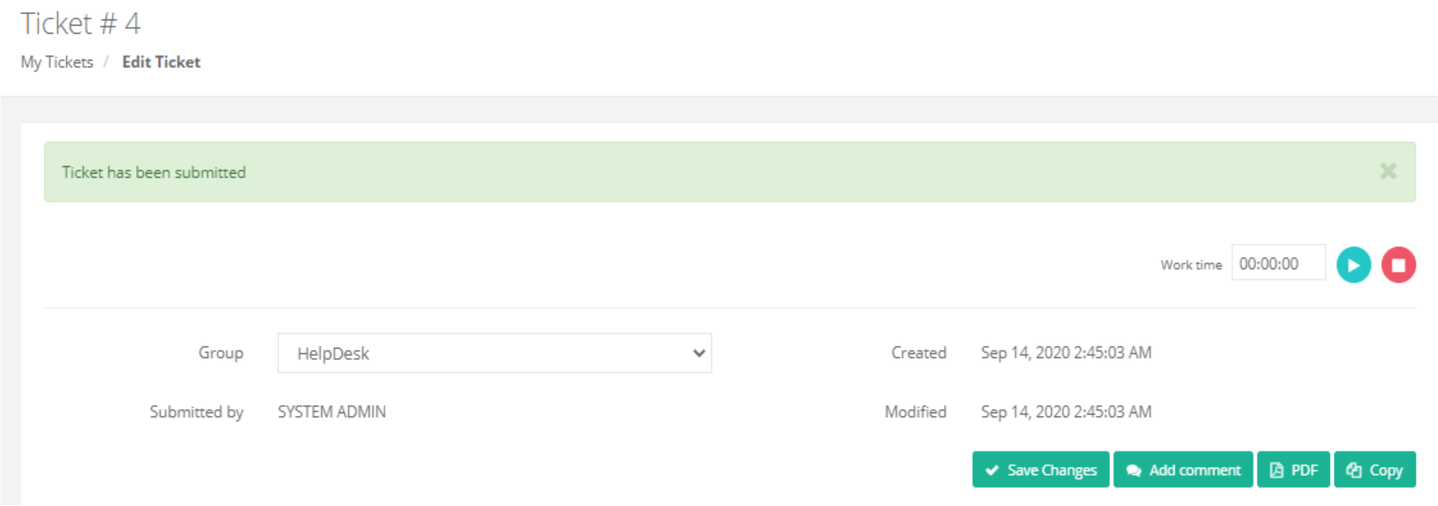


Created Ticket Information

After the Ticket is created and saved, additional information will appear. The following is a brief explanation of the contents of a created ticket.

The top of the Ticket (***Figure 6***) contains information such as the ticket number, when it was created, who submitted the ticket, and when it was last modified. Three buttons also appear in this section.

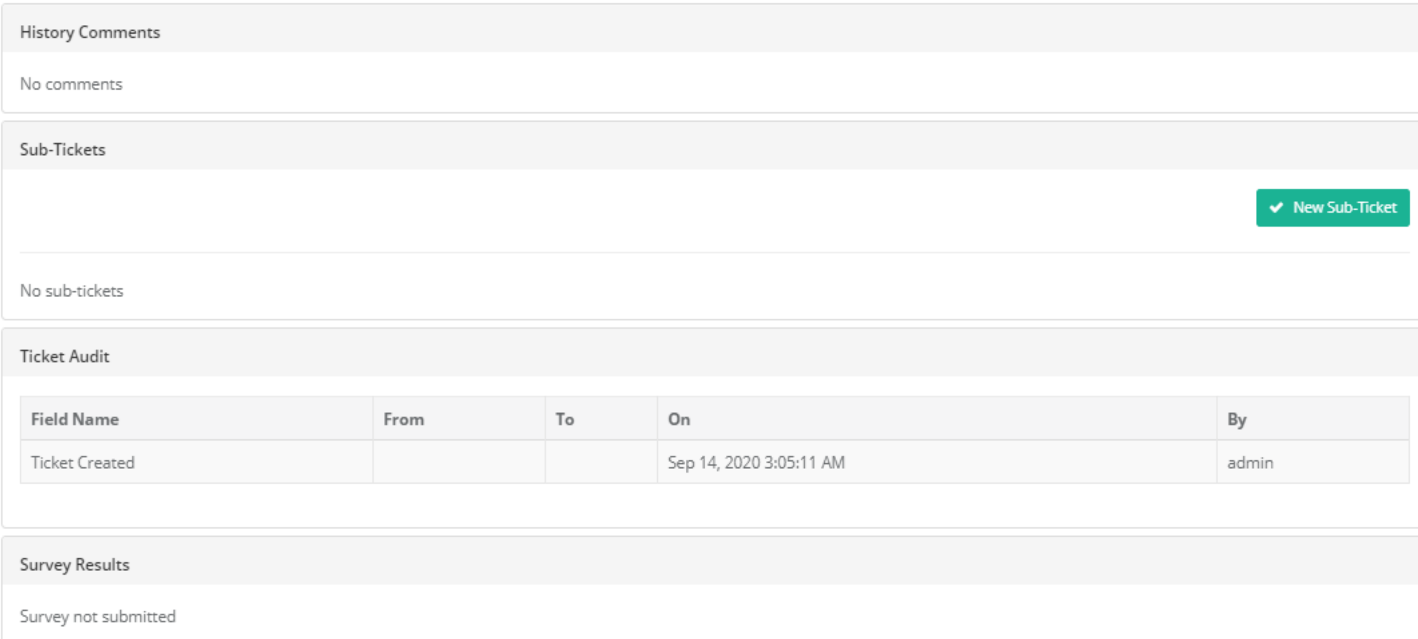
Figure 6



- The **Save Changes** button will save any changes or updates you have made to the ticket.
- The **Add Comment** button will allow you to add a comment to the ticket with any updates that have been made and notify the Technician and/or the User or neither.
- **PDF** button will open the ticket as a PDF document that can be printed, saved, or emailed to another person in your organization
- **Copy** button will copy the ticket and create a new one where information can be changed if needed

Five new sections will be added to the bottom of the Ticket as well (***Figure 7***): **History Comments, Attachments, Sub-tickets**, **Ticket Audit**, and **Survey Results**. These five sections record various status changes and actions that occur after the ticket has been created.

Figure 7



History Comments

Whenever a change is made and saved on a Ticket, the person editing the Ticket is prompted with a Note textbox. The Note textbox is designed to allow the person editing the Ticket to explain and clarify why the Ticket is being changed or notify others about a related issue or problem. Attachments can be added to the note as well. The notes are recorded in the History Comments section where everyone who can view the ticket can see them. In this way, every ticket contains a history of explanations, concerns, etc., that pertain to that ticket.

Sub-tickets

Tickets can be logged in a series of Parent and Child tickets. This feature enables tickets to be organized in a hierarchy. For example, if a ticket is logged concerning a virus that has spread department-wide, it is also very likely that other tickets will be logged that detail specific problems caused by that virus. All of these sub-problems stem from a single problem—the virus that has spread throughout a department. It is possible to create sub-tickets regarding the same problem by opening the existing ticket and clicking **New Sub-Ticket.** This will allow you to create a new ticket as a Child ticket to the initial problem. Once the sub-ticket is saved, it can be accessed under the Sub-Ticket section of the Parent ticket or by searching the Child Ticket number. More information on the Parent/Child Ticket relationship can be found in the **Mass Update** section of the Help Files.

Ticket Audit

On every ticket there is a **Ticket Audit** section. The Ticket Audit is designed to record and time-stamp every change that is made on a ticket.

The Ticket Audit section has five different columns:

- **Field Name**: Records the field or category being changed. For example, if the audit trail is re-cording a change in Status for a ticket, **Status** will appear in the Field Name.
- **From** and **To**: These two columns record the actual change to the ticket—the change from one designation to another. For example, a status can change **from** Awaiting Dispatch **to** Work In Progress.
- **On**: Records the date and time the change was made.
- **By**: Records who made the change.

For example, if technician pparker changes the Status of a ticket **from** Assigned Not Updated **to** Work In Progress on Sep 14, 2020 (3:05:11 AM), the Ticket Audit will record it as shown in ***Figure 8***.

Figure 8

Ticket Audit

Field Name	From	To	On	By
Ticket Created			Sep 14, 2020 3:05:11 AM	admin

Survey Results

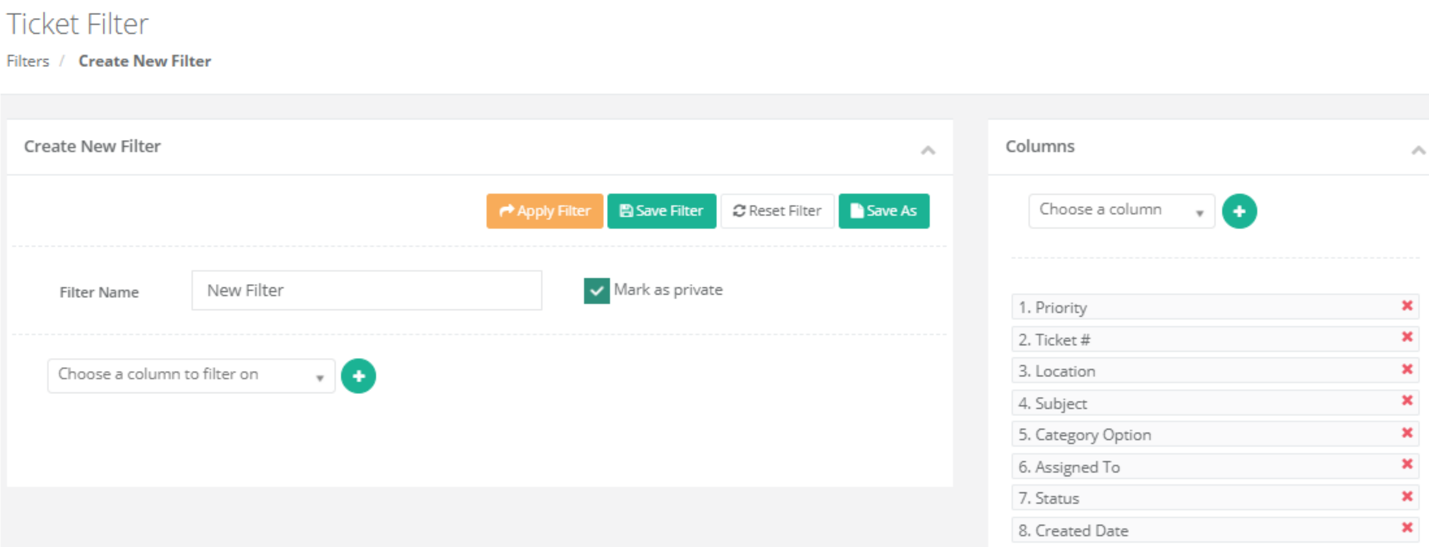
Contacts can be given the opportunity to fill out a survey after the problem described in their ticket is solved. This allows HelpDesk administrators to run reports on customer satisfaction. The results of these surveys are attached to the bottom of the ticket so that, when viewing a ticket and its status changes, you can also view the End User's response to the help desk process. If no survey has been taken for a Ticket, the Survey Results section will read *Survey not submitted*. For more detailed information, see the **Surveys** section of the Help Files.

Ticket Search

The Search is a tool that allows you to define criteria used for individual Ticket Filters. Using this tool you can search for tickets using multiple ticket fields including custom fields created by your organization.

To enter the Search (***Figure 9***), click on the **Search** tab at the top of the page.

Figure 9



Create a Filter

The Ticket Search automatically loads as a new filter. To name your filter, type a new name in the **Filter Name** text field.

You have the option of making the filter private or public. Check the box to **Mark as Private,** uncheck the box to mark **Public**. Filters marked **Private** will only appear under your **My Filters** section of the Ticket Filters page. Leave the check box blank and the filter will appear organization-wide under the Public Filters section of the Ticket Filters Page.

<u>Field Selection Box</u>

Click the down arrow to **Choose a column to filter on**, then click the green plus sign to apply. There are 19 Ticket Filter options (**Ticket Number**, **Subject**, **Contact**, **Created Date**, etc.) by default. (If History Subject and/or Note are selected, the most recent History Subject/Note will be displayed.

Once you have your Field Boxes added to the Ticket Search, you can define your search criteria. The first drop-down box in each Field box is a list of Boolean Operations that can be used to help define your search criteria. These operation choices are:

- Equals
- Not Equals
- Greater Than
- Less Than
- Contains
- Not Contains
- Starts With
- Ends With

The operations listed depend on the Field Box. Once you have chosen a Boolean Operation from the drop-down you can add your search criteria with text fields, drop-downs, or system searches in the different Field Boxes.

The **Created Date**, **Modified Date**, and **Estimated Completion Date** Field Boxes have search criteria options for Today, This Week, This Month, On, Before, After, Range, Last X Hours, Last X Days, Last X Weeks, Last X Months, and Last X Years. Select the criteria for your search and then enter in the date selection or numerical value and the search will be performed with your desired date criteria. This Week, This Month, Last X Hours, Last X Days, Last X Weeks, Last X Months, and Last X Years will all automatically update with the passing of time. For example, if you filter your search to show all open tickets created in the last 5 hours, this report will automatically update to be exactly 5 hours from the current time on the server.

Custom Field Selection

If your organization has Custom Fields, they will be listed under **Custom Fields** for your selection. Select the field and click to select.

If your organization has multiple Custom Fields with the same Field Label, only one Custom Field box will appear in the Field Selection Box. To distinguish between the different Custom Fields you will need to narrow your search criteria by including Category Option in your search.

Note: To search on checkbox Custom Fields, you must select the Equals or Not Equals option and enter **true** or **false** (not case sensitive). This information must be entered in English, regardless of the language the application is currently running in.

Survey Results Selection

Survey Results are also available to search. The Survey Question Fields available for your search:

- **Please rate your experience on a scale of 1 to 5, 1 being unsatisfactory, 5 being excellent**
- **Was your ticket answered in a timely manner?**
- **Was your ticket answered?**

Search Criteria

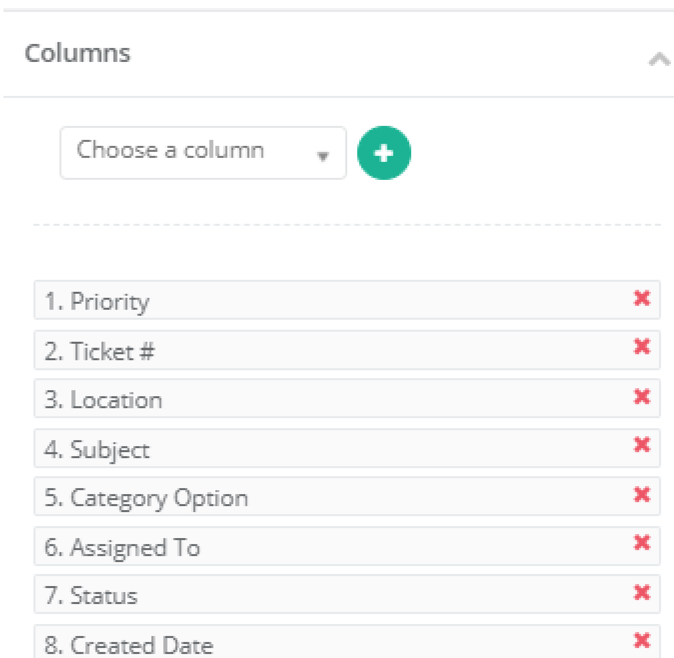
- **Drop-down criteria**: click the drop-down arrow and select the option you would like to search by. Once the option you select fills the drop-down box, click the **green plus sign** located to the right of the item to add it to your search criteria. You can also type in the drop-down box to perform google-like searches in the drop-down options.
- **Text Field criteria**: type in any text field among the search boxes. To add your text as criteria for your filter, click the **green plus sign** located at the end of the text field.
- **System Search criteria**: click on the **magnifying glass** for Category or Category Option to launch a pop-up window that will list these search options in their hierarchical order. There will be a drop-down with two Boolean operation choices, Equals or Not Equals. By default Equals will be the Boolean operation selected in each drop-down. After choosing the Boolean Operation you desire click on the checkbox next to the Category or Category Option you would like to add to as your search criteria. Click **Apply** and the pop-up window will close and add the select-ed search criteria to the Field Box. (Note: the search method for Category and Category Option are presented in a separate pop-up window, allowing you to see the hierarchical order. In other words, you are not only able to see what Categories or Category Options are available. You are able to see what Group each Category belongs to, or see what Category a Category Option belongs to.) You can close this pop-up window at any time by clicking on the circular x icon in the top-left hand corner of the pop-up window.

Click on the **magnifying glass** for ZENworks Assets to launch a pop-up window with three text fields to search for ZENwork's assets: **Asset Name**, **Asset Type**, and **Operating System**. Enter your desired criteria and click on the **Search Button** to pull up specific ZENworks Assets that can be added as your search criteria. If you want to search all assets, you can leave the search boxes blank and click the Search Button. A list of ZENworks Assets that meet search parameters will appear in the pop-up window. The **Glasses Icon** can be clicked on to view the ZENworks Asset Detail Page for that asset. Click on the checkbox next to the ZENworks As-set you would like to add to your search criteria, then click on the **Add Selected Assets to the Search Button**. The pop-up window will close and add the selected search criteria to the Field Box.

To remove any search criteria from a Field Box click on the **red delete sign** located to the right of each option.

Next, define the Column Order for your filter. In the upper right corner of each Field Box there is a check box. Click this **check box** to add the Field Box Label to the **Column Order** box (***Figure 10***). The Column Order box defines how your search results will be displayed and initially sorted, assigning a column to each Field Box Label added. For example, if you add two Groups to your Ticket Filter but do not add the Field Box Label "Group" to the Column order box, the filter will still search for your selected Groups, but the search results will not assign Group its own column.

Figure 10



You can arrange the order of the items listed in the Column Order box by drag-and-drop. To move one item, simply click and drag it to the desired place.

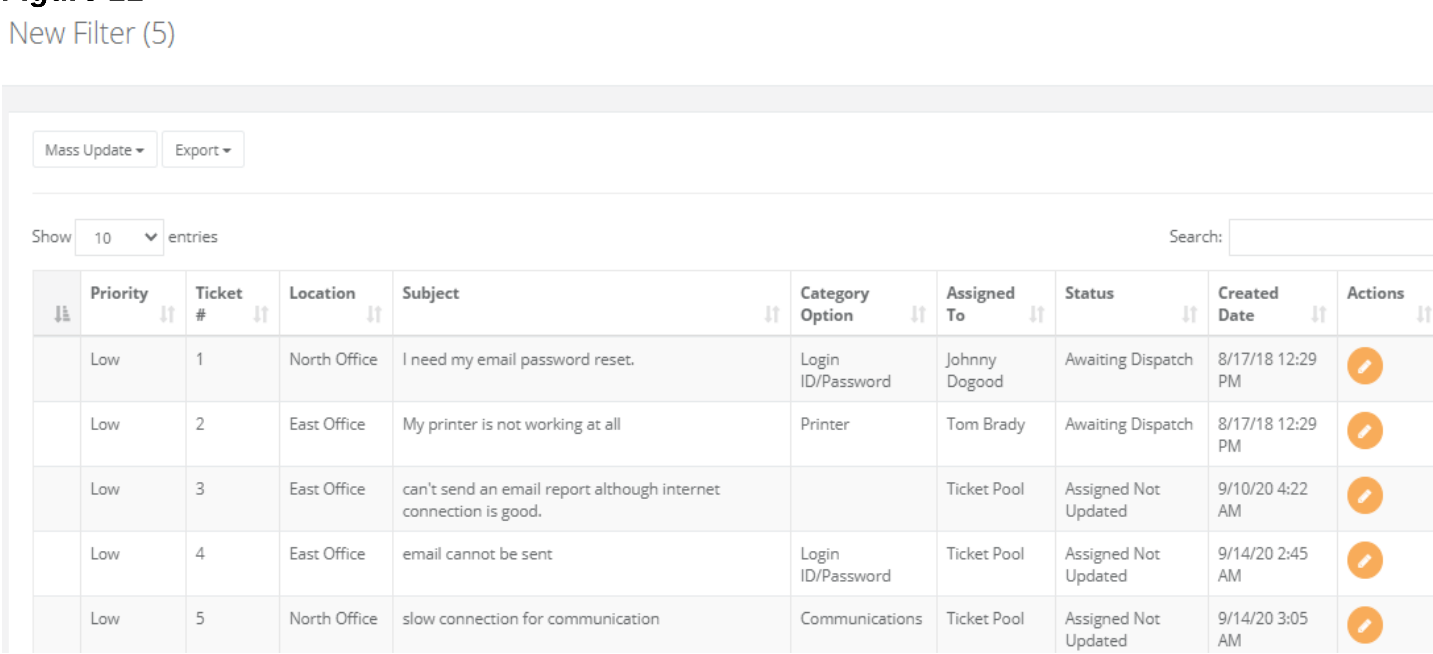
The defaults for the results are Priority, Ticket #, Location, Subject, Category Option, Assigned To, Status and Created Date.
Once you have selected all your search criteria, select one of the following options at the top of the Ticket Filter page:

- The **Apply Filter** button is discussed in the following section.
- **Save Filter**: this button will save the Filter and add it to the Ticket Filter Page, where it can be managed and used for Dashboards, the My Ticket Screen, Graphical Reports, or a Ticket Search.
- **Reset Filter**: Choosing this button will clear any fields you have added and reset the Ticket Search to the default boxes of Priority, Ticket #, Location, Subject, Category Option, Assigned
  To, Status and Created Date.
- **Save As**: This will give you the option to save the filter you have created under a new name. This is useful when modifying an existing filter. You can add or delete fields as desired and save the changes you have made with a new name. This will keep the original filter as it was before.

Apply a Filter

The **Apply Filter** button will open a separate Search Results pop-up window (***Figure 11***) with the results of the filter you created. The order in which the columns are listed will depend on the order you have chosen in the Column Order box in the Ticket Search screen. The results will display in order depending on the first column chosen.

Figure 11



	Priority	Ticket #	Location	Subject	Category Option	Assigned To	Status	Created Date	Actions
	Low	1	North Office	I need my email password reset.	Login ID/Password	Johnny Dogood	Awaiting Dispatch	8/17/18 12:29 PM	
	Low	2	East Office	My printer is not working at all	Printer	Tom Brady	Awaiting Dispatch	8/17/18 12:29 PM	
	Low	3	East Office	can't send an email report although internet connection is good.		Ticket Pool	Assigned Not Updated	9/10/20 4:22 AM	
	Low	4	East Office	email cannot be sent	Login ID/Password	Ticket Pool	Assigned Not Updated	9/14/20 2:45 AM	
	Low	5	North Office	slow connection for communication	Communications	Ticket Pool	Assigned Not Updated	9/14/20 3:05 AM	

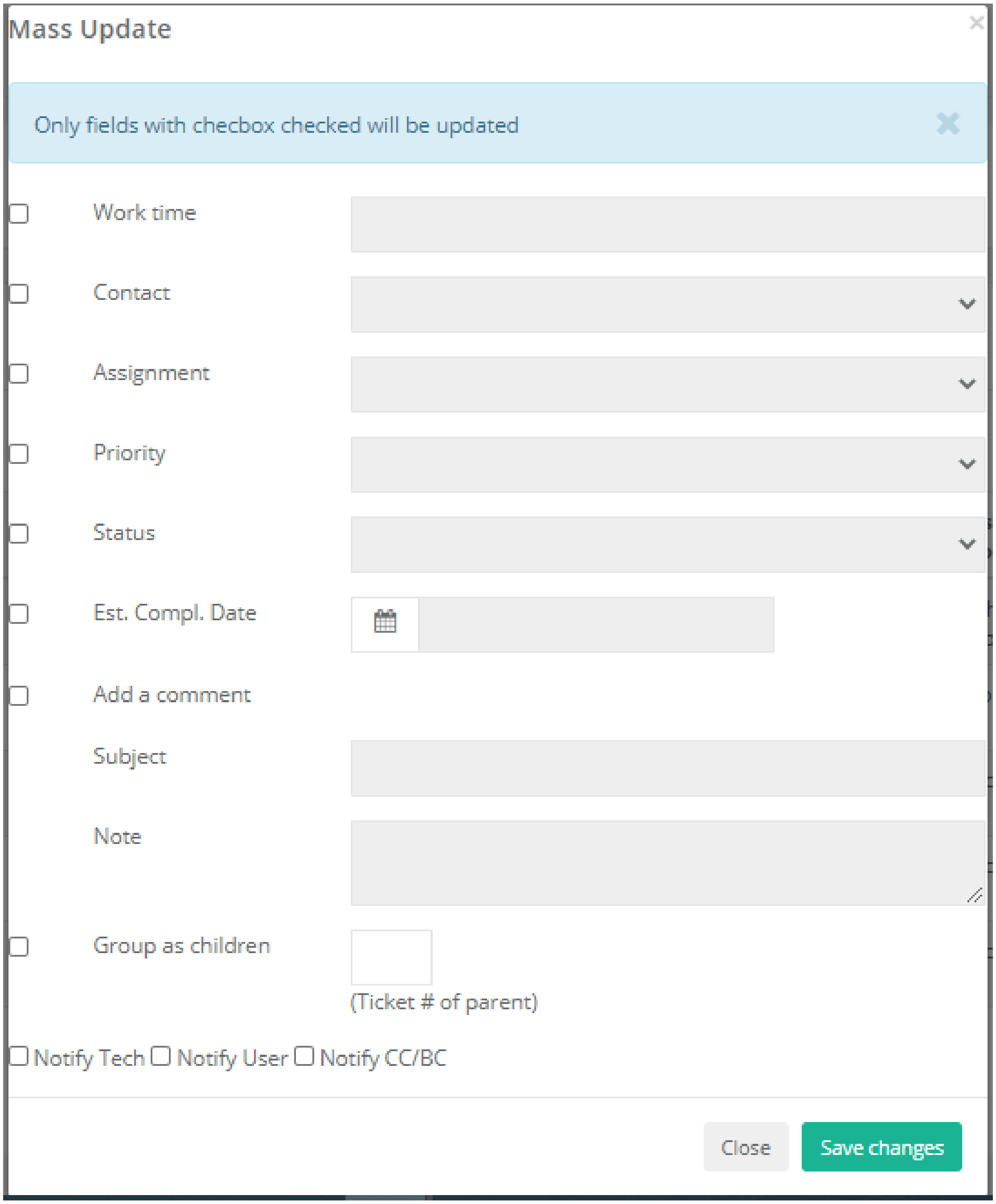
- **Note**: If History Subject and/or Note are selected in the Ticket Search, the most recent History Subject/Note will be displayed on its own line.

Mass Update Tickets

To mass update tickets, use the **Shift** or **Control** key to select which tickets you would like to update and select the **Mass Update** button in the top left-hand corner of the window.

- The Mass Update box will appear as shown in ***Figure 12***.

Figure 12



You have the option to update the

- **Work time**: Format must be in 00:00:00 (hours, minutes, seconds)
- **Contact**: Select a contact from the drop-down list or use the text box as a google-like search
- **Assignment**: Select a contact from the drop-down list or use the text box as a google-like search
- **Priority**: Select a priority from the drop-down list or use the text box as a google-like search
- **Status**: Select a status from the drop-down list or use the text box as a google-like search
- **Estimated Completion Date**: Clicking in the text box will bring up a calendar from which you can choose a date for estimated completion of all selected tickets; format for the date must be MM/DD/YYYY
- **Add a Comment to all selected tickets**: Add a Subject and/or Note in the designated text field to add them to all selected tickets
- **Group as children**: Type the number of a **Parent Ticket** in the text field to tie all selected tickets to that ticket in a Parent/Child relationship

• To select a Mass Update option, click the check box to the left of the desired option and fill in the information necessary for that option. You have the ability to update multiple pieces of information at the same time.
• Once you have selected the update options and filled in the information, click the **Save Changes** button. A message will then appear with the following information:

  - **Successfully saved tickets**: Here will be listed all tickets that were saved with the chosen information successfully
  - **Unsuccessfully saved tickets**: Here will be listed any tickets that were unable to save with the information chosen in the Mass Update

  For example: All selected tickets are updated with a new Assignment. All tickets are successfully updated except one. This ticket may have a Category or Category Option that cannot be worked on by the chosen Technician and, therefore, would not update properly.
• If do not wish to update any tickets, click the **Cancel** button.

Mass Delete Tickets

To delete one or more tickets, select the tickets you wish to delete and select the **Delete** option from the **Mass Update** multi-action drop-down in the top left-hand corner of the Search Results pop-up window.

- To select multiple consecutive tickets, select the first ticket, hold the **Shift** key, and select the last ticket.
- To select multiple tickets that are not listed consecutively, hold the **Control** key and select each ticket.
- When you choose the delete option, a pop-up box will appear asking if you are sure that you want to delete the selected tickets, and will list the selected tickets. If you want to delete them, click on the **OK** button. The window will close and the tickets will be deleted. If you do not want to delete them, click the **Cancel** button.

Export Tickets

You also have the option to Export the Ticket List in either an Excel or PDF format. These documents can be saved, printed, or emailed to anyone in your organization.

Ticket Sorting and View

In the results window you have the following options:

- Sort the tickets by the individual columns. For example, to list the ticket results by number in ascending order, click the Ticket # column header. To reverse the order, click the column header again.
- To view an individual Ticket, double-click the ticket you wish to open. The ticket will open in a separate window.

Ticket Filters

The **Ticket Filters** page is a management page that lists all the **Private Filters** the logged in user has created as well as any **Public Filters** that have been created in the system. It was designed to allow for easy management of your Ticket Filters as they are used for the engine of the My Ticket Screen, Reports, and Ticket Search.

My Filters

The **My Filters** section of the page has a list of Filters that you, the logged in user, have created. These Filters are organized in rows with three columns: **Filter Name**, **Visibility**, and **Actions**.

- The **Filter Name** column lists (in alphabetical order) the ticket filter name that was created by that user.
- The **Visibility** column lists whether a filter is **Public**, indicating the filter is a public filter and therefore visible in the **Public Filters** throughout the application, or **Private**, indicating that the filter is a private filter, only visible to that user in the application.
- The **Actions** column lists three actions that can be taken for that particular Ticket Filter: **Apply**, **Edit**, and **Delete**.

Public Filters

The **Public Filters** section of the page has a list of Filters that are public and visible to everyone throughout the application (based on the user's rights and privileges). These Filters are organized in rows with three columns: **Filter Name**, **Owner**, and **Actions**.

- The **Filter Name** column lists (in alphabetical order) the ticket filter name of that particular filter in the system.
- The **Owner** column lists the name of the individual that created or last updated the Public Filter. If the System Administrator created the Filter, the Owner's Name will be listed as SYSTEM ADMIN.
- The **Actions** column lists three actions that can be taken for that particular Ticket Filter: **Apply**, **Edit**, and **Delete**.

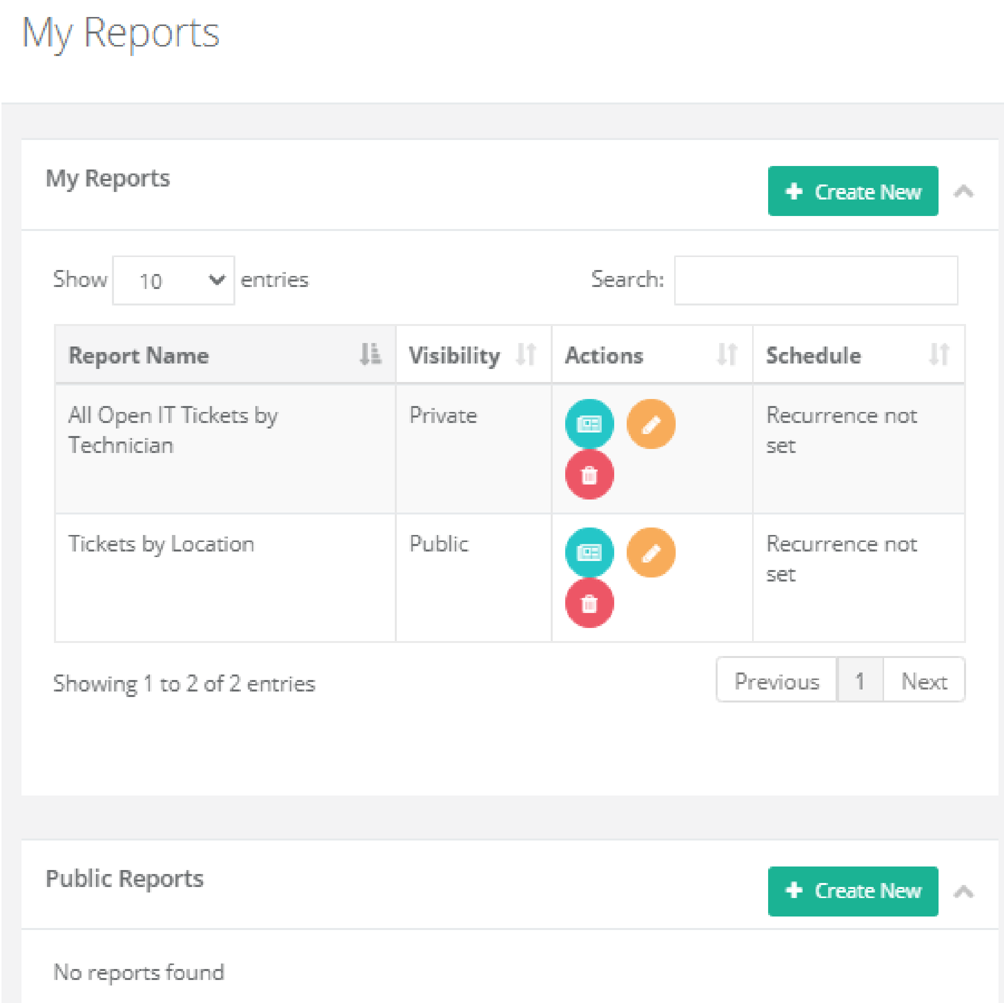
Create New Ticket Filter

To create a new Ticket Filter from the Ticket Filter page, click on the Create New button on the right side of the Ticket Filters page. This will take you to the Ticket Search page. For information on how to navigate the Ticket Search page please see the **Search** section.

Reports

The **Reports Page** (***Figure 13***) is a management page that lists all the **My Reports** (private Reports, the logged in user has created), as well as any **Public Reports** that have been created in the system. It was designed to allow easy management of your graphical reports and the ability to create automatic, scheduled reports. This tool is also the power behind *e*HD's Dashboard feature.

Figure 13



My Reports

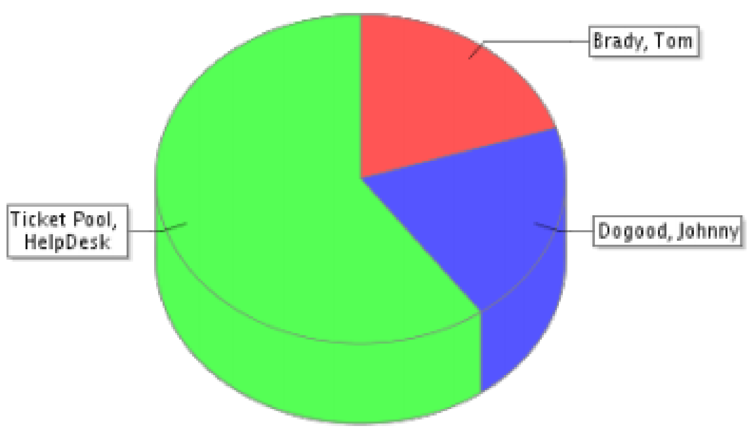
The **My Reports** section of the page has a list of Reports the logged in user has created. These Reports are organized in rows with four columns: **Report Name**, **Visibility**, **Actions**, and **Schedule**.

- The **Report Name** column lists (in alphabetical order) the report name that was created by that user.
- The **Visibility** column lists whether a report is
    - **Public**, indicating the report is a public report and therefore visible in the **Public Reports** throughout the application, or
    - **Private**, indicating the report is private and only visible to that user in the application

- The **Actions** column lists three actions that can be taken for each Report: **View**, **Edit**, and **Delete**.
  - If the **View** icon is clicked, that particular Report will be run and opened in the **Report Results** pop-up window for viewing purposes (***Figure 14***).

Figure 14

			#	%	WorkTime
Brady, Tom			1	20.00 %	00:00:00
Ticket Id:2	Created:Aug 17, 2018 12:29 PM	Modified:Aug 17, 2018 12:30 PM			
Assigned To:Brady, Tom	Contact:Doe, Jane	Worktime:00:00:00			
Dogood, Johnny			1	20.00 %	00:00:00
Ticket Id:1	Created:Aug 17, 2018 12:29 PM	Modified:Aug 17, 2018 12:30 PM			
Assigned To:Dogood,	Contact:Doe, Jane	Worktime:00:00:00			
Ticket Pool, HelpDesk			3	60.00 %	00:00:00
Ticket Id:3	Created:Sep 10, 2020 4:22 AM	Modified:Sep 10, 2020 4:22 AM			
Assigned To:Ticket Pool,	Contact:ADMIN, SYSTEM	Worktime:00:00:00			
Ticket Id:4	Created:Sep 14, 2020 2:45 AM	Modified:Sep 14, 2020 2:45 AM			
Assigned To:Ticket Pool,	Contact:ADMIN, SYSTEM	Worktime:00:00:00			
Ticket Id:5	Created:Sep 14, 2020 3:05 AM	Modified:Sep 14, 2020 3:09 AM			
Assigned To:Ticket Pool,	Contact:ADMIN, SYSTEM	Worktime:00:00:00			
Grand Total:			5		00:00:00



- The **Schedule** column lists the recurrence for that Report in three different ways.

  - If there is not recurrence pattern set for the Report, the column will list **Recurrence not set**.
  - If a recurrence is set and has not yet been started, a Play icon will be shown along with a still half-circle pattern to the right of it. The still half-circle pattern shows that the recurrence pattern is not currently running. To start the set Recurrence Pattern, simply click the play icon. The half-circle icon will begin rotating, indicating the recurrence is running.
  - If a recurrence pattern is set and has been started, a Stop icon will be shown along with a rotating half-circle pattern to the right of it. The rotating half-circle pattern indicates the recurrence pattern is currently running. To stop or pause the Recurrence Pattern, click the stop icon. The rotating half-circle icon will stop indicating the recurrence is no longer running.

Public Reports

The **Public Reports** section of the page has a list of Reports that are public and visible to everyone throughout the application (based on the user's rights and privileges). These Reports are organized in rows with four columns: **Report Name**, **Owner**, **Actions**, and **Schedule**.

- The **Report Name** column lists (in alphabetical order) the name of that particular report in the system.
- The **Owner** column lists the name of the individual that created or last updated the Public Report. If the System Administrator created the Report the Owner's Name will be listed as SYSTEM ADMIN.
- The **Actions** column lists three actions that can be taken for that particular Report: **View**, **Edit**, and **Delete**.

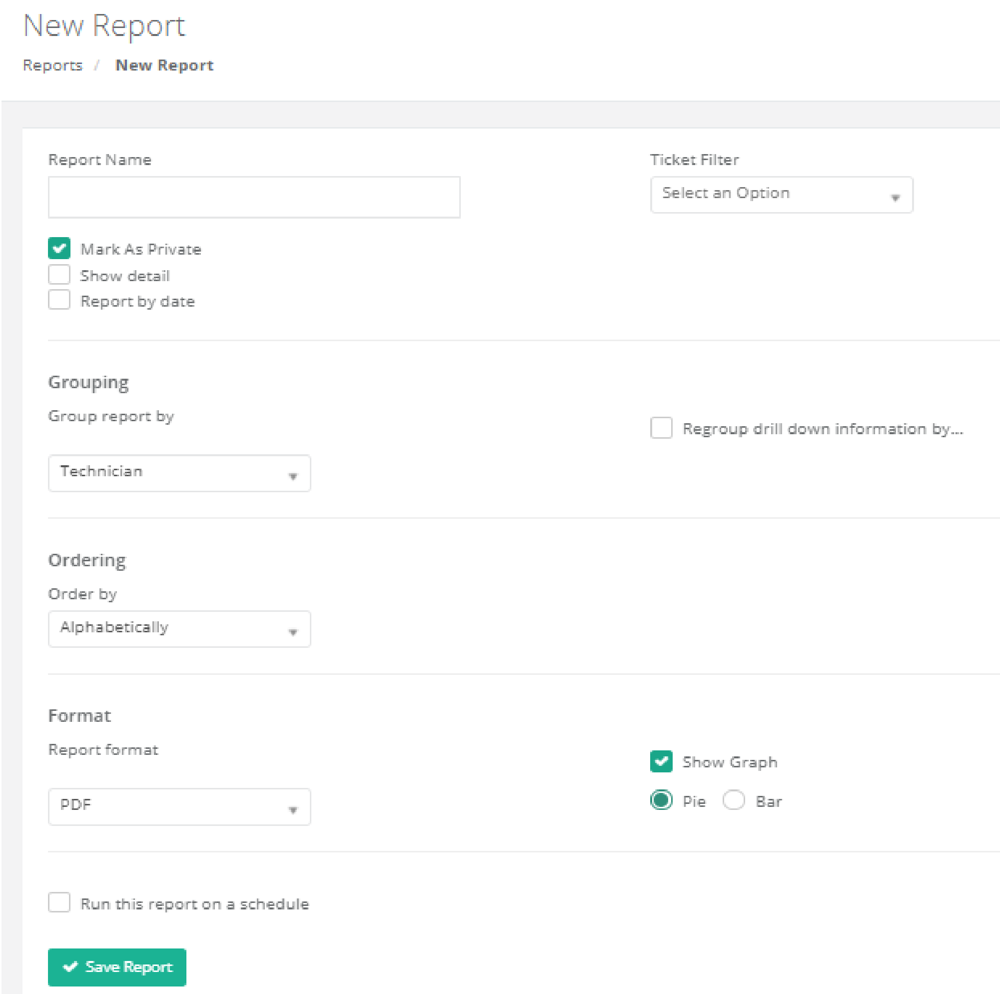
- The **Schedule** column lists the recurrence for that Report in three different ways.

  - If there is not recurrence pattern set for the Report, the column will list **Recurrence not set**.
  - If a recurrence is set and has not yet been started, a Play icon will be shown along with a still half-circle pattern to the right of it. The still half-circle pattern shows that the recurrence pattern is not currently running. To start the set Recurrence Pattern, simply click the play icon. The half-circle icon will begin rotating, indicating the recurrence is running.
  - If a recurrence pattern is set and has been started, a Stop icon will be shown along with a rotating half-circle pattern to the right of it. The rotating half-circle pattern indicates the recurrence pattern is currently running. To stop or pause the Recurrence Pattern, click the stop icon. The rotating half-circle icon will stop indicating the recurrence is no longer running.

Create New Report

To create a new Report from the **Reports** page click on the Create New button on the right side of each column. This will take you to the **New Report** page (***Figure 15)***.

Figure 15



Fill out the information on the New Report page

- **Report Name**: Give a name that will properly reflect the Report.
- **Ticket Filter**: Select the Ticket Filter you would like to create the Report from.
- **Report by date**: If you would like to Report on tickets for a certain period of time, be sure this box is checked. A drop-down will appear on the right side of the screen in the same row with the choices to **Order by** the **Day**, **Week**, **Month** (default), or **Year**. If you wish to show all tickets, leave this box unchecked.
- If the Report by date option is not selected, you have the option to run the report grouped by a specific criteria by clicking the **Group report by** drop-down and selecting one of the following options:

- **Group**
- **Location**
- **Category**
- **Technician**
- **Priority**
- **Status**
- **ZENworks 10 Asset**

- You can then regroup the report results after you have drilled down into a grouped report by clicking on the **Regroup drill down information?** checkbox. Clicking this checkbox will load another drop-down box titled By. This drop-down has the same possible options as the **Group report by** options listed above.

- For example, if you want to show all tickets that belong to your IT Group and organize them by technician, then by priority, open the **Ticket Search**, click in the **Group** field box's drop-down and select the IT. Click on the **green plus sign** to add it to the search criteria for the Group field box. Next, click on the checkbox in the top right corner of the Group field box to make that a column that appears in the **Column Order** of the report. Save the Filter under the name IT Group.
- Click the Reports icon at the top of the screen to be taken to the Reports Management page. Click the circular Green Plus icon at the top of the page to navigate to the New Report screen and add a new report.
- Name your report and select the IT Group ticket filter from the **Ticket Filter** drop-down. Select Technician from the **Group report by** drop-down and check the **Regroup drill down information** checkbox. When the By drop-down appears, select Priority from the list. Next, select the Bar graph radio button and check the **Show Graph** checkbox. From the **Report format** drop-down select PDF and Alphabetically from the **Order by** drop-down.
- Once you have defined your report, click the **Save Changes** button in the top-right corner of the Reports screen. This will take you back to the Reports Management page where you can choose to View, Edit, or Delete your new report. Click the View icon and the Report will open in a new window and will be grouped by technician, showing the total number of tickets assigned to the technician, the percentage of all the Group's tickets that it represents, and the ticket's work times. You can click on a technician's name to drill-down and regroup that technician's ticket by priority. To see the tickets in each priority for that technician, click one of the priorities and the ticket details will appear, allowing you to pull up the ticket from the Ticket ID or email the technician it is assigned to by clicking on the Assigned to name.

- **Show Graph**: If you would like to show a graph of the selected ticket template, check this box. Then select whether you want the results displayed in a Pie chart or a Bar graph.
- **Report format**: Select from the drop-down menu which format you would like the report results displayed in. The following options are available for reporting:

- **PDF**: This option will allow for the report to be emailed to a boss, saved on a computer or network, or be printed.
- **HTML**: This is simply a text format.
- **Excel** spreadsheet: This will open the report in Excel and allow you to change and modify the report according to the rules and capabilities of the program.
- **CSV** file: This format will open as an Excel CSV and will show the tickets' column titles in columns and rows for modification.

- **Order by**: Select how you want the tickets ordered in your report. The following options are available:

- **Alphabetically**: The results will be listed by technician in alphabetical order.
- **Greatest # of Tickets**: The technician with the greatest number of tickets will be listed first followed by the next highest and so on **Configure Scheduler for this report**: When this box is checked, a Scheduler box will appear.

  This is a powerful tool that will allow you to run Reports on a specific schedule without having to manually run the report every time. You can set the following to occur for your report.

  - **Recurrence Pattern**: If you would like to create a Recurrence Pattern for your Report that will automatically launch the Report, select the radio button for the option to run the Report
    - **Daily**: Set your Report to Recur Ever (X) Day(s)
    - **Weekly**: Set your Report to Recur Every (X) Week(s) on any certain day of the week
    - **Monthly**: Set your Report to run on a certain day of every (X) month(s) OR the First, Second, Third, Fourth, or Fifth (Day of the Week) of every (X) month(s)
    - **Yearly**: Set your Report to run on any certain day of a certain month OR the First, Second, Third, Fourth, or Fifth (Day of the Week) of a certain month every year
  - **Range of Recurrence**: In the **Start** text box, state when you would like your report recurrence pattern to begin. Then select whether you want it to **End After** a certain number of occurrences, **End By** a certain date, or **End Never**.
  - **Email Message to be sent**: If you would like to send the report to certain people in your organization, add their email addresses in the **To** text field. Add a **Subject** and/or **Body** for your email. The report will be added to the email as an attachment.
  - **Example**: You can set a report to run from the **Open IT Tickets** Ticket Filter every Monday morning and be sent to the IT Department Manager for analysis. To do this, you would
    - Select the Open IT Tickets filter from the **Ticket Filter** drop-down menu
    - Check the Configure Scheduler for this report checkbox
    - Select the **Weekly** radio button under Recurrence Pattern
    - Set it to **Recur Every 1 Week** and select the **Monday** checkbox
    - Set the **Range of Recurrence** to **Start** the same day you set up the Scheduler and select the **End Never** radio button
    - In the **Email Message to be sent** section, enter the IT Department Manager's email address (**To**) along with a **Subject** and/or message (**Body**)
    - The Report will be sent in an email every Monday morning as an attachment to the email you provided.

  Note: Scheduled Reports will be sent at 2:30 a.m. the day it is scheduled to be released.

When you have finished filling out all the desired information, click the **Save Changes** button. This will save your Report in the Reports page under your My Reports section where you have View, Edit, or Delete the report.

eHD Internal Asset Tracker

everything HelpDesk allows you to have your groups' assets managed by *e*HD's internal asset tracker, ZENworks' asset tracker, or no asset tracker at all. Note that Novell ZENworks is an option, but must be configured to select. See the **ZENworks 11 Assets Tracker** section for details. Locate the Asset Tracker window:

- Click on the **Settings** button
- Click on under **System,** select **ZENworks Configuration** (***Figure 16***)

Figure 16

Select the box to enable ZENworks Integration.

Click the **Save Changes** button before exiting.

*e*HD Asset Tracker - Settings

Asset Types

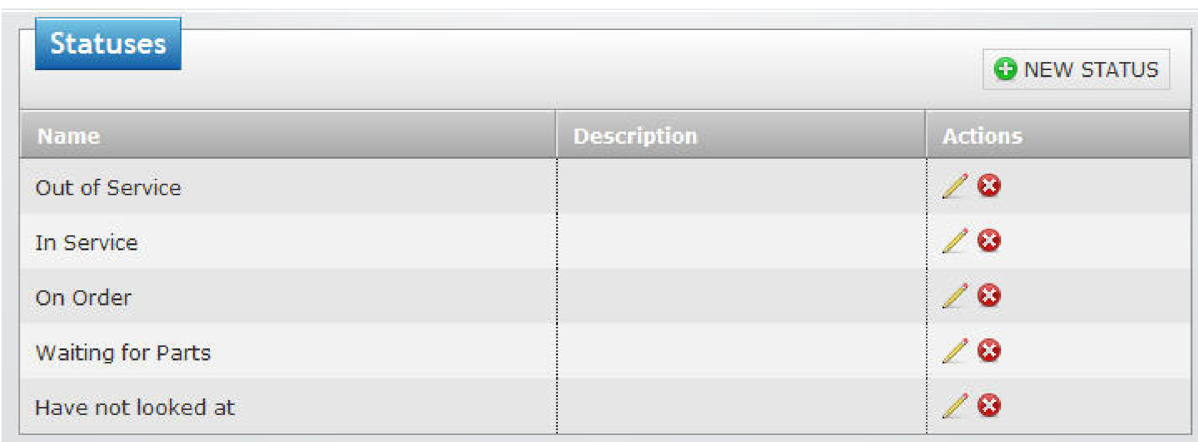
Once you have accessed the Asset Tracker management page, click on **Settings** and then **Asset Types**. Every asset entered will need to be categorized by a type. Some examples of these are: Lap-top, Desktop, Furniture, & Landline Phone.

- To add an Asset Type, click on **New Asset Type.** Name is the only required field.
- After entering a name, and description if desired, click **Save Changes**. The **Asset Type** is now displayed.
- You can edit the Asset Types by clicking the edit icon at the end of the desired asset's row.
- You can delete an Asset Type by clicking the are not allowed to delete an **Asset Type** that is being used by an **Asset**.

Statuses

Click on **Statuses**. Here you have the opportunity to give each asset a status (***Figure 21***). Some examples of these are: Out of Service, In Service, and On Order.

Figure 21



- To add a **Status**, click Name is the only required field.
- After entering a name, and description if desired, click **Save**. The **Status** is now displayed.
- At the end of each row are two icons: The first to edit the status and the second to delete it . You are not allowed to delete a **Status** that is being used by an Asset.

Field Groups

Click on Field Groups. An explanation of what a Field Group is appears on the page. It reads:

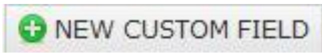
Field Groups

An Asset Field Group contains a group of custom fields and shows up as a tab on the Asset Details page. A Field Group may be associated with multiple Asset Types, and an Asset Type may contain multiple Field Groups.

- To add a **Field Group**, click Name is the only required field.

- The **Asset Types** you have entered also appear on this page. The field group is available to any asset that has the same **Asset Type** that is selected here.
- If no **Asset Type** is selected here, the field group, and corresponding **Custom Fields**, will not be shown for any **Assets**.
- After entering a name, a description (if desired), and **Asset type**(s), click **Save**. The **Field Group** is now displayed.
- At the end of each row are two icons: The first to edit the status and the second to delete it

Custom Fields
Click on Custom Fields. You can add **Custom Fields** to all **Field Groups** added.

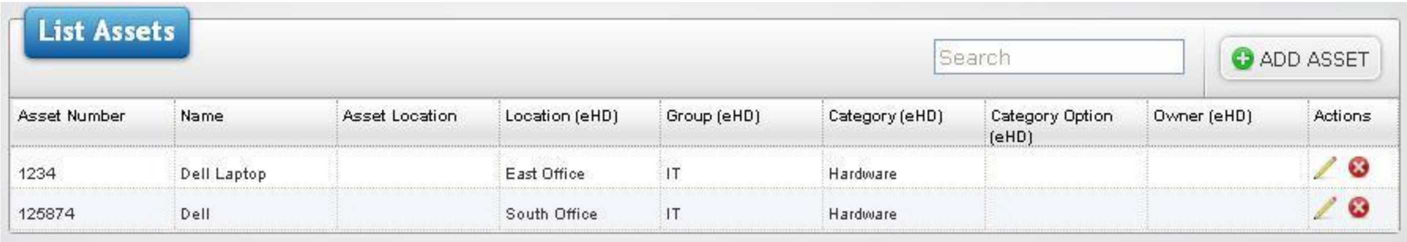
- To add a **Custom Field** select the **Field Group** tab you want, then click 

Name and Type are the only required fields.
- You can also add a description, make it a required field, and determine what order the field is displayed.
- After filling out the fields click Save. The Custom Field is now displayed.
- At the end of each row are two icons: The first to edit the status and the second to delete it

Managing *e*HD Assets

Locate the **List Assets** link on the left navigation pane in the Asset Tracker window under **Assets**. Clicking on the **List Assets** link opens up a list of all the assets in the application (***Figure 22***). Note that the icon for the Asset Tracker window only appears if *e*HD's Asset Tracker has been configured. See the section **Asset Tracker - Settings** for details.

Figure 22



Filtering Assets

- To sort the asset list in the List Assets window, click on the column names in the top row of the list. The column will sort alphabetically or numerically (depending on the column) in ascending order. Clicking the same column name will sort the information in descending order.
- To filter the assets in the Asset List, click on the **Search Assets** link. Clicking on this link opens filter text boxes underneath the column names in the top row of the list (***Figure 23***). Type in the desired search text in each of the columns.

Figure 23

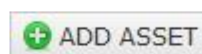
Hide Filters

Asset Number	Asset Name	Location	Asset Location	Group	Category	Category Option
0001	Dell Computer	District Offices	Main Office	IT	Network	Configure
321456789	Personal Computer 1	High School	Room #238	IT	Hardware	Keyboard
213567984562	Personal Computer 2	District Offices	Room 410	Facilities	Grounds	Lawn
87958566	Power Edge T1000	High School	Teacher's Lounge	IT	Hardware	Keyboard
5529946	Rack R280	District Offices	Room 100	IT	Network	Configure

- Example: If you want to run an inventory to check for each Asset Location in the HelpDesk, click on the **Show Filters** link and then type in the text box under the **Location** column the name of a location—e.g., Mount Jasper High School—and press **enter**.
- The filter will only display assets that have Mount Jasper High School as the Asset Location.

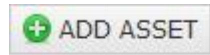
- This same method can be followed to filter on any of the other column names. You can also type part of the word and press enter and it will pull up a list of closest matches (like 'Mount' for 'Mount Jasper High School').

Add, Edit and Delete Assets

- To add an asset from the List Assets screen simply click on the 

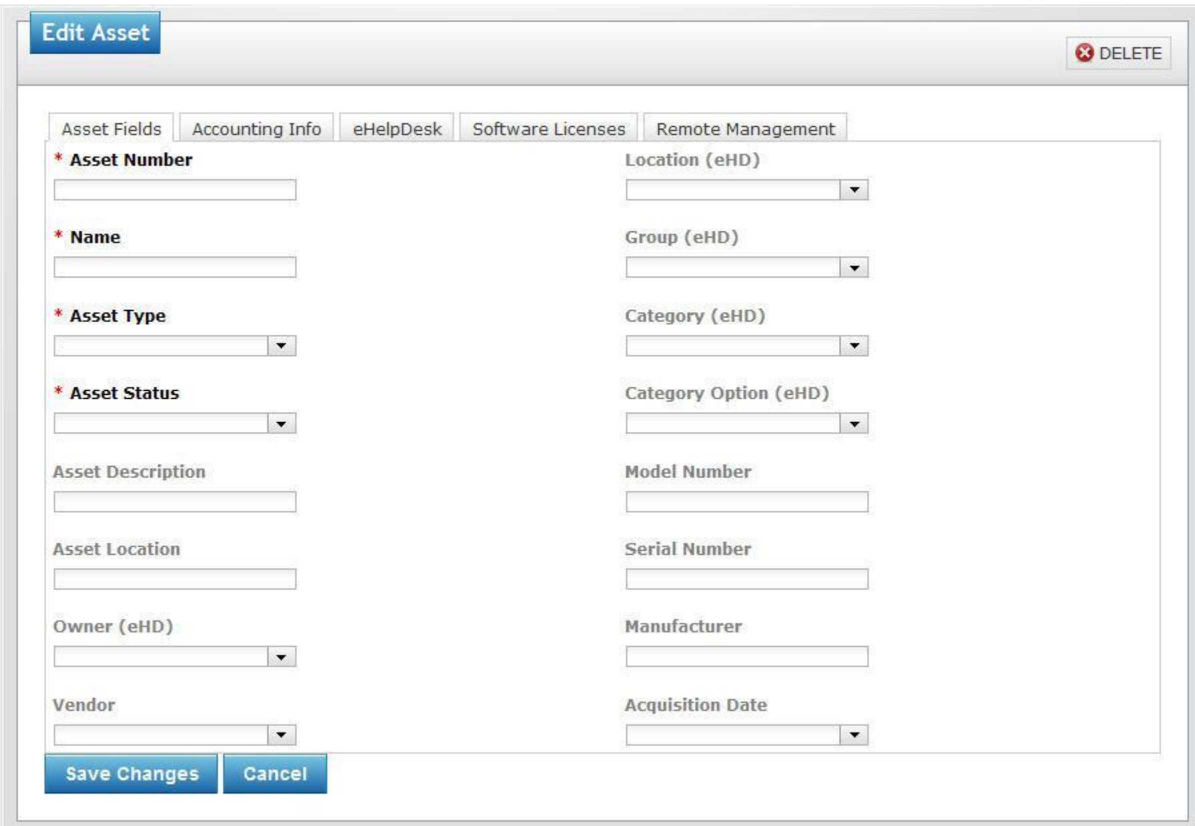
in the top right hand of the screen. See the section **Add an Asset** for more details.
- Click on any of the assets in the Asset List to pull up the Field Groups associated with that asset as well as all other relevant asset information. You can change and modify the asset's information and save the changes from this page.
- You can also delete the asset by clicking on the delete icon  which appears at the top of the page.

Add an Asset

- Locate the **Add Asset** link on the left navigation pane or the 

at the top of the List Assets screen. Clicking either of these links will pull up the Field Groups (represented by tabs at the top of the screen) that contain information for that Asset. The default tabs are: **Asset Fields**, **Accounting Info**, ***e*HelpDesk**, and **Software Licenses**. Any additional Field Groups that are added will also appear as tabs on this page.
- The **Asset Fields** tab (***Figure 23***) has four fields that are required (*) in order to save the asset: **Asset Number**, **Asset Name**, **Asset Type**, and **Asset Status**. The rest of the fields in the Asset Field's tab are optional. Fields that are determined by the *everything* HelpDesk setup are marked as '*e*HD.

Figure 23



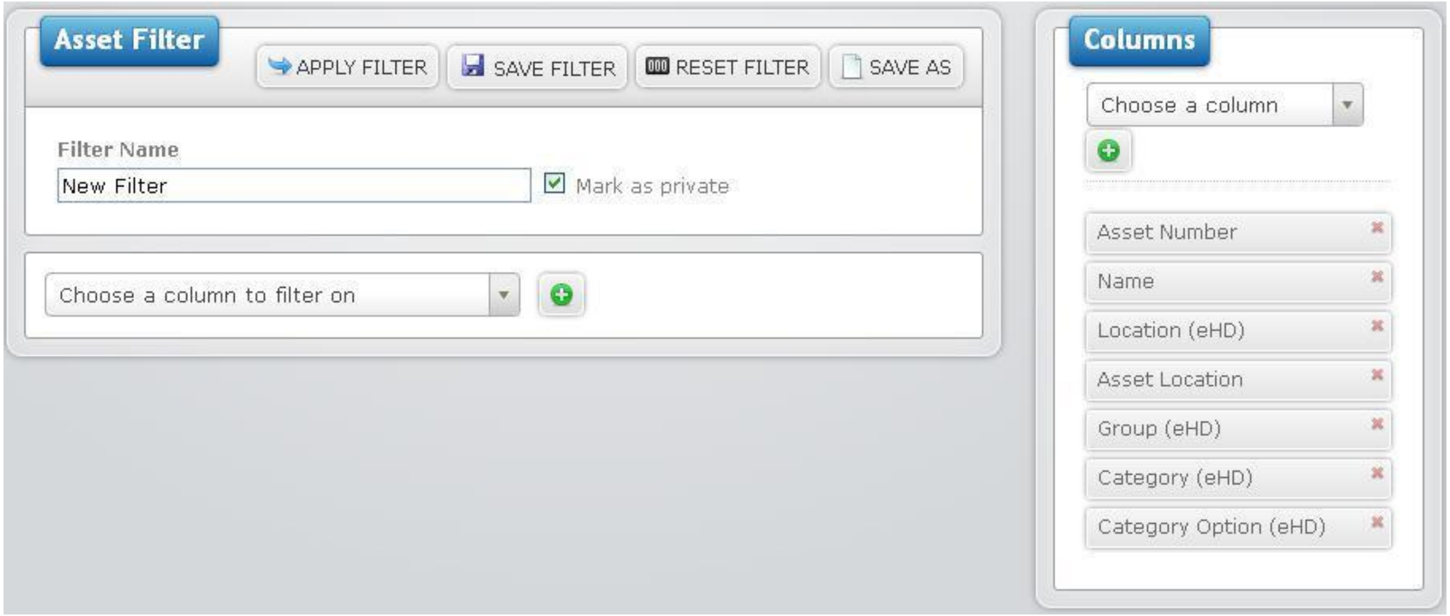
- The **Accounting Info** tab contains fields that deal with the financial information for the asset.
- The ***e*HelpDesk** tab shows tickets that the asset is tied to. The tickets are shown in rows with columns for the # (ticket number), **Group, Subject**, and **Status**. Clicking on a ticket row pulls the actual ticket to allow comments or updates to be made to the tickets. Hovering over the subject of the ticket will pull up a text bubble that will display the subject of the ticket in its entirety.
- The **Software Licenses** tab shows all the software that is associated with that asset. You can add software to the asset by clicking in the dropdown box in the upper left-hand corner of the screen, selecting the software you want to tie to the ticket, and clicking the add icon. Clicking the add icon will add that software license to the asset. All software licenses tied to the ticket ap-pear in rows with columns titled **Product Name** and **Product Version**. The product name and product version, as well as the software selections that populate the dropdown, can be created on the **Software Licenses** page.

- After entering the desired information for the Asset, click **Save Changes**. Clicking **Save Chang-es** pulls up the **List Assets** page with the new asset. To cancel anything that has been entered for an asset, but not yet saved, click on the **Cancel** button. Clicking on the **Cancel** button deletes any entered data and takes you back to the **List Assets** page.

Search Assets

- Locate the **Search Assets** link on the left navigation pane under Assets. Clicking on the **Search Assets** link pulls up the asset fields that are searchable (***Figure 24***).
- The asset search allows you to create and save filters and return the results as a list of assets or as a report. Each field that is used to describe an asset can be searched from here. click the dropdown box to choose option from a list, then click the green plus sign to select. Additional information can be added below to complete the search.
- Other fields have magnifying lenses next to the field name. When clicked, a list of hierarchically formatted options is opened.

Figure 24



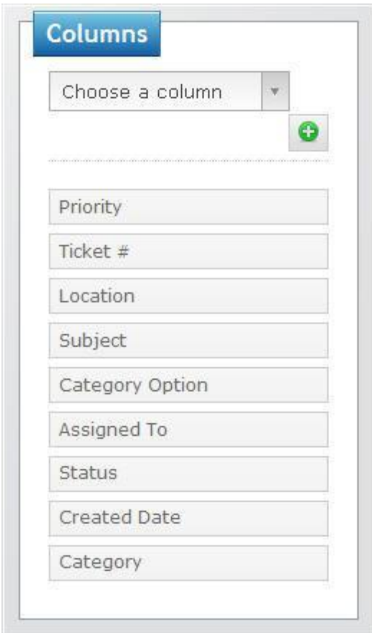
- **Category** is an example of one of these fields. Clicking on the magnifying lens next to **Category** will open a list of all the Groups in the HelpDesk that assets can be tied to.
- Clicking on the Group name causes the Categories for that Group to appear below the Group name. The Categories have check boxes next to their names so you can select which ones you want to search by checking the check boxes next to them. You can also click the check box named **Select All** to select all the Categories for that Group. When you have

  selected all of the relevant Categories, click the **Apply** button  and your selected Categories will be added to the Category field.

- Each tab from the **Add Asset** section appears in the Asset Filter as its own section. The sections provided by default are **Asset Fields** and **Accounting Info**. The **HelpDesk** tab does not appear here - to search that information, use the **Ticket Search**. Any **Field Groups** and their Custom Fields will also appear here as their own section. You can collapse and expand the sections by clicking on the section header.

- The last section in the Asset Filter is **Column Order** (***Figure 25***). This section allows you to customize the result set of the search. Whatever fields you put in the **Column Order** list will be the columns that appear in the search results.

Figure 25



You are able to move fields up and down to order them however you like. You can move multiple fields in order by clicking the top field and, while holding the **Shift Key**, clicking on the last field you want to select. When your choices are selected, drag the selection over to the **Column Order** list. You can select multiple fields out of order by holding the **Ctrl Key** and clicking on the fields you would like to drag to the **Column Order** list.

- When you have all the fields and criteria selected and the **Column Order** list filled as desired, click on the apply filter button. The **Asset Filter** section will collapse and the search results will appear.
- To delete any of the assets retrieved in the search results, click the checkbox on the left side of each asset and then click the **Delete Selected Assets** button. If you would like to delete all the assets retrieved in the search results, click on the checkbox on the left side of the Name column header, and then click on the **Delete Selected Assets** button.
- You can sort the results list by clicking on the column names in the column header. They will sort according to the type of field, either numerically or alphabetically. You can also choose how many asset rows per page to display by clicking on the **Row/Page** dropdown in the bottom right-hand corner of the Assets Section.
- You can turn your search results into a graphical report by clicking on the **Create a Graphical Report** checkbox before you apply the Asset Filter. Clicking on this checkbox will open a section of the Asset Filter that will ask you to select the Report Format

The possible report formats are PDF, Excel, and CSV. Click in the **Report Format** dropdown and select the format you desire. Next, click on the **Group Report By** dropdown and select how you want to group the results: by Asset Type, Asset Status, Location (*e* HD), Group (*e*HD), Category (*e*HD), Category Option (*e*HD), and Owner (*e*HD User). Click on the **apply filter icon** after you have finished selecting your options to view your new report.

- The PDF version of the Graphical Report can be saved on your computer or emailed to a recipient. Excel and CSV format will open (modified) in their respective applications.

- An Asset filter can be named and saved, giving you the ability to easily report on the same criteria multiple times a year. To name a filter click in the **Filter Name** text area at the top left corner of the screen and type your filter name. You can then either save the filter as a private filter (only you can see it in the **Asset Filter** dropdown box) or a public filter (everyone can see in the **Asset Filter** dropdown box). To make it a private filter, leave the **Mark as private** checkbox checked, which is its default state. If you want to save the filter as a public filter, click on the
Mark as private checkbox to uncheck it. Once you have decided if the filter is public or private, click on the save filter icon . Your saved filter is accessible in one of two sections of the drop down: either the **My Filters** section or the **Public Filters** section.
- To delete a saved filter click on the delete filter icon .

Tying a Ticket to an Asset

After you have set up the Internal Asset Tracker, *e*HD users will have the ability to tie assets to the ticket. The Asset field and icon will not appear until a group has been selected. Depending on the group selected, it will be determined what assets are searchable and can be tied to the ticket. If you are unsure of the asset ID, but would still like to search for the asset, click on the Magnifying Glass Icon , which will open the Asset Search pop up window (***Figure 27***).

Figure 27

*e*HD's VNC Remote Control of Internal Assets

Once an asset is tied to a ticket and you have enabled *e*HD's VNC Client, the ticket will have a **Remote Control Icon** next to the asset. When the icon is clicked the application will launch the VNC Client for Remote Control. This will open as a pop-up window that will ask for a **VNC Client Password**; enter the VNC Password and the remote control session will begin. Clicking the **Remote Control Icon** will create a History Comment in the History Comment Section of the ticket saying that a remote control session was requested by a technician, including the technician's name, the date, and
the time when the session was requested.

Vendors

The **Vendors** link in the left navigation pane will pull up a page with a list of vendors associated with your assets (***Figure 28***).

Figure 28

Vendors

Name	Primary Phone	Email
Dell	526-321-6598	dellsupply@dell.com
GroupLink	8013350700	info@grouplink.net
GWAVA	5057215536	info@gwava.com
Microsoft	629-547-9866	Products@microsoft.com
Microsoft	7125553214	help@msn.com
Novell	8015697411	help@novell.com

Vendors are listed in rows with columns titled **Name**, **Primary Phone**, and **Email**. The vendors added in this section populate the Vendor dropdown in the **Asset Fields** tab for each asset.

- The first way to add a vendor is to click the New Vendor button NEW VENDOR on the top right corner of the screen. A page will appear with information fields for the vendor. **Name** is the only required field to save the vendor's information. After entering a name and any other desired in formation, click the **Save** button. Clicking on the **Save** button will close that screen and take you back to the **Vendors** page where the new vendor will be displayed.
- The second way to add vendors is to click the **Import Vendors** button. This will open the Import Vendors page (***Figure 29***)

Figure 29

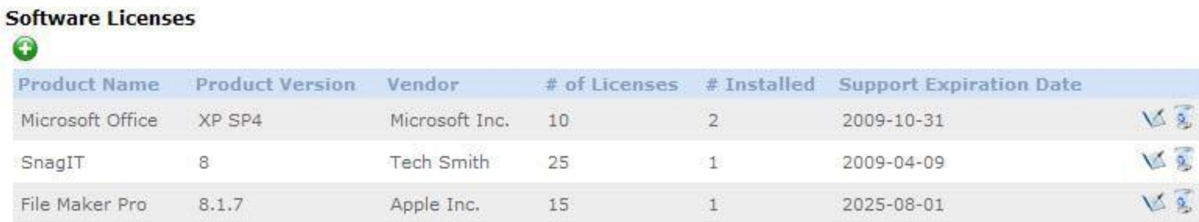
- Select the CSV file of vendors you would like to import
- Select the radio button for the CSV file type you are importing
- If the first line in your file is a row of labels, select the **Is the first line a row of labels?** check box
- Click the **Load File** button to import the list of vendors

- At the end of each vendor row are two icons, one to edit the vendor and one to delete it Clicking on the edit icon pulls up the vendor information page and allows you to change and modify the information. It is important to note that you are not allowed to delete a Vendor that is being used by an asset.

Software Licenses

The **Software Licenses** link on the left navigation pane will pull up a page with a list of software licenses (***Figure 30***).

Figure 30



Software Licenses

Product Name	Product Version	Vendor	# of Licenses	# Installed	Support Expiration Date
Microsoft Office	XP SP4	Microsoft Inc.	10	2	2009-10-31
SnagIT	8	Tech Smith	25	1	2009-04-09
File Maker Pro	8.1.7	Apple Inc.	15	1	2025-08-01

Software licenses are listed alphabetically in rows with columns titled **Product Name**, **Product Version**, **Vendor**, **# of Licenses**, **# Installed**, and **Support Expiration Date**. The software licenses added in this section populate the Software Licenses dropdown in the Software Licenses tab for each asset.

- To add a software license click on the NEW SOFTWARE LICENSE in the top right corner of the screen. A page will appear with information fields for the software license.

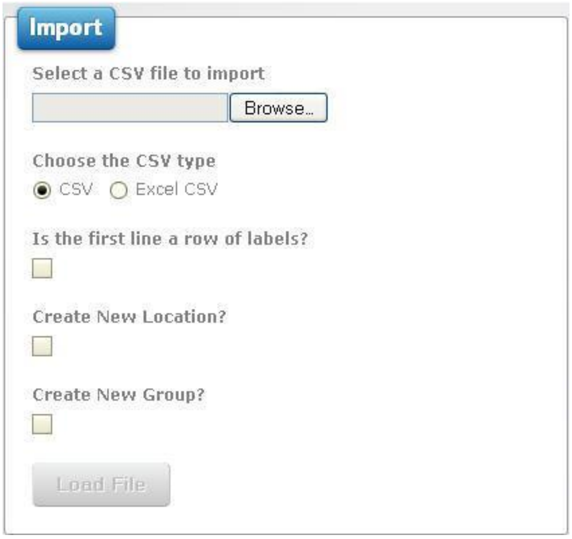
  - **Product Name** is the only required field to save the software license's information.
  - At the bottom of the screen is a line titled **# Installed**. The initial number is zero. After you save the software license and then associate it with an asset the number will change to reflect how many licenses are installed and associated with an asset. These numbers will automatically update on the Software Licenses information page as well as the Software Licenses list page.
  - After entering a product's information, click **Save**. Clicking on the **Save** button will close that screen and take you back to the Software Licenses information page with the new software license displayed.

- At the end of each software license row are two icons, one to edit the software license and one to delete it. Clicking on the edit icon will pull up the software license information page and allow you to change and modify the information.

Import

Locate and click on the **Import** link in the left navigation pane to pull up a page that will allow you to import your assets (***Figure 31***).

Figure 31



For an import to be successful, the same four fields as in adding an Asset (Asset Name, Number, Type, and Status) are required. In order to import assets into the Asset Tracker the assets need to be in a CSV file. Note that a CSV file that has blank cells will not import correctly.

- To find the CSV file that is stored on your computer or network, click **Choose File**. Go through your network layout and find your CSV file. Double click on the file to pull it into the Asset Tracker's Import section.
- Next, click on the radio button that pertains to the type of CSV file you have. Click **CSV** if you have a CSV or click **Excel CSV** if you have an Excel CSV.
- If your CSV file has labels in the first row, click the **Is the first line a row of labels?** checkbox. If your CSV file does not have labels in the first row, do not check the check box.

  - It is important to note that the fields in your CSV document must match your existing asset fields exactly, including spelling. Otherwise, the import will create new Categories, Category Options, Statuses, and Priorities. Verify that everything is spelled correctly or configure your Asset Tracker beforehand.
  - To Import custom fields, the CSV file and the custom fields have to have the same possible values and the fields need to be created before the import process can begin. If not, you do not want a custom field, the custom information will have to be mapped to a predefined field in the Asset Tracker. See the Custom Fields section below for more details.

- Create New Location? and Create New Group? check boxes have been added to allow for new Locations and Groups to be created within the help desk from your CSV file. If you would like either of these events to occur, simply check the corresponding check box. If the Location and/or Group for your assets already exists within the help desk, leave these boxes unchecked.

- Click the **Load File** button.
    - If your CSV file has labels in the first row, the labels will be pulled into the mapping screen that allows you to map your CSV fields with select fields in the Asset Tracker. If your CSV file does not have labels in the first row, the column numbers will appear on the mapping screen allowing you to map those columns with select fields in the Asset Tracker
    - Note that if assets being imported have the same asset number as an asset already in the asset tracker, the import utility will update the information of that particular asset.
- Click on the drop-down box next to each column name on the mapping screen and a list of all possible fields in the Asset Tracker will appear. Click on the Asset Tracker field that you want to map your column to and continue to the next row. It is important to note that any custom information will have to have a custom field created for it in the Asset Tracker before you run the import.
- When you are finished mapping the columns to fields in the Asset Tracker, click on the **Import** button. Your screen will reset and your assets will be imported and listed under the List Assets link in the left navigation pane.

Custom Fields

- To import into a checkbox, the custom field needs to have a name. In the CSV you have to use True or False. True will mean that the checkbox gets checked, False will mean that the check-box is left unchecked.
    - An example of this is if you want to know if an asset is leased or not.
    - Name the custom field Leased and, in the CSV, create a column header titled Leased.
    - For each cell in that column put a False or True for whether or not it is leased. A true value will check the checkbox and a False value will leave the checkbox unchecked.
- To import into a date field, the CSV file date column must be formatted as mm/dd/yyyy. If not, the date will not appear in the Asset Tracker custom date field. An example of this is if you want to create a leased date field.
- To import into a custom radio button, the custom field needs to have a name and the possible options for the radio buttons must also be named. The CSV column needs to have the same name as the custom radio button field with the values in the column’s cells matching the possible options for the radio button.
    - An example of this is if you want to know if an asset is leased or not.
    - Create a custom radio button field named **Leased?**
    - Next, create the two possible options for the radio buttons: a Yes radio button and a No radio button.
    - In the CSV file, name the column Leased? and make sure the values in the column’s cells are either Yes, if the asset is leased, or No if the asset is not leased. If the value in the cell is **Yes**, that asset will have the Yes radio button checked.
- To import into a custom dropdown field, the custom field needs to have a name and the possible options in the dropdown need to be named. The CSV column needs to have the same name as the custom dropdown field with the values in the column’s cells matching the possible options in the dropdown.

- An example of this is if you want to know the year an asset was leased but you don't need a specific date.
- Create a custom dropdown field named Year Leased
- Create the possible options for the dropdown: a 2008 date, a 2007 date, and a 2006 date field.

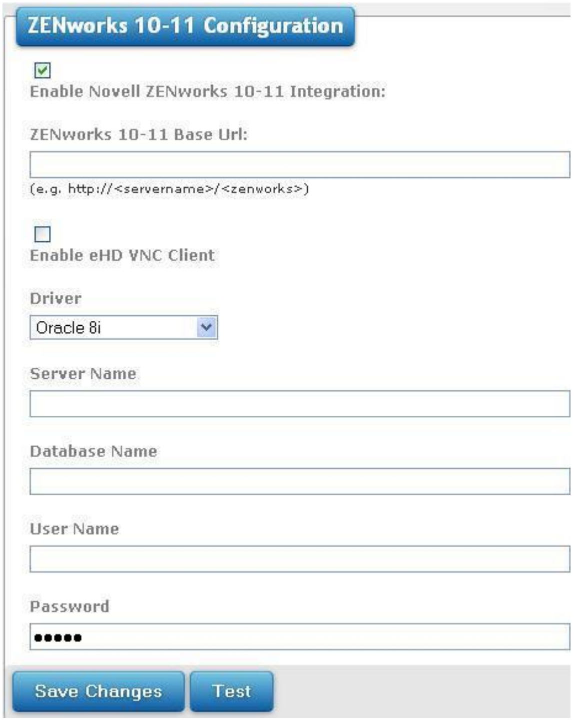
• In the CSV file you would name the column Year Leased and make sure that the values in the column's cells are either 2008, 2007, or 2006. Whatever value the column's cell has will be the option that is in the custom dropdown field for the asset.To import into a custom text field, the custom field needs to be named and the CSV column needs to have the same name as the custom text field. Whatever value is put in the column's cells will be the text that appears in the custom text field. The text field has a standard width of about 25 characters, but can hold up to 256 characters.
• To import into a custom text area, the custom field needs to be named and the CSV column needs to have the same name as the custom text area field. Whatever value is put in the column's cells will be the text that appears in the custom text area field. The text area will size to fit the characters typed in the area.
• To import Custom Fields, click the **Settings** menu bar in the left navigation pane and click the **Custom Field Setup** link. This will open up the Custom Fields page which will show the Custom
Field Groups that custom fields can be added to. (See Field Groups page to learn how to set up Field Groups.)

Reports

• Locate the **Reports** link on the left navigation pane. Clicking on the **Reports** link pulls up a page with six canned reports. The reports are: **Assets by Owner**, **Assets by Group**, **Assets by Type**, **Lease Expiration Report**, **Warranty Expiration Report**, and **Purchase Report**. To view a desired report, click on the report name and a PDF version of the report will appear with pulled information from your database. This report can be saved and emailed.

ZENworks Asset Tracker

In order for the ZENworks option to be available under the Group Configuration link you must first set up the ZENworks Configuration by clicking the link under the Settings button, then click **ZENworks Configuration** (***Figure 33***).



You will be given the option to **Enable Novell ZENworks Integration**. Upon doing so, you will need to fill out the **Base URL**, indicate whether or not you wish to **Enable eHD's VNC Client**, choose the **Driver**, write the **Server Name**, write the **Database Name**, and write the **User Name**. If you have chosen to use the embedded
Sybase ODBC drive, list the ODBC Data Source Name (for more info. see KB article 128). You may then test the connection, and click Save Changes. You will then need to log out and log back in to apply the changes.
After configuring your ZENworks return to the **Asset Track Group Configuration** as outlined in the **eHD Internal Asset Tracker** section, select the **Novell ZENworks** radio button, and click **Save Changes**.

Tying a Ticket to an Asset

After the system administrator has completed the ZENworks configuration page they may activate ZENworks Asset Tracker, allowing you to tie ZENworks assets to the ticket. The Asset field and icon will not appear until a group has been selected. Depending on the group selected, it will be deter-mined what assets are searchable and can be tied to the ticket. If the selected group's assets are managed by ZEN, then the assets will be pulled from the ZENworks DB. If the assets are managed by *e*HD, they will be pulled from *e*HD's DB. If you are unsure of the asset ID, but would still like to search for the asset, click on the **Magnifying Glass Icon**, which will take you to the ZENworks Asset Search Page.

Asset Search Page

The ZENworks Asset Search Page (***Figure 34***) allows you to search ZENworks's DB for existing assets. If your system is integrated with eDirectory or Active Directory, this page will automatically populate with the assets tagged as the Contact's Primary Assets and all Assets the Contact has Logged Into, starting with the most logged into by time, from greatest to lowest number.

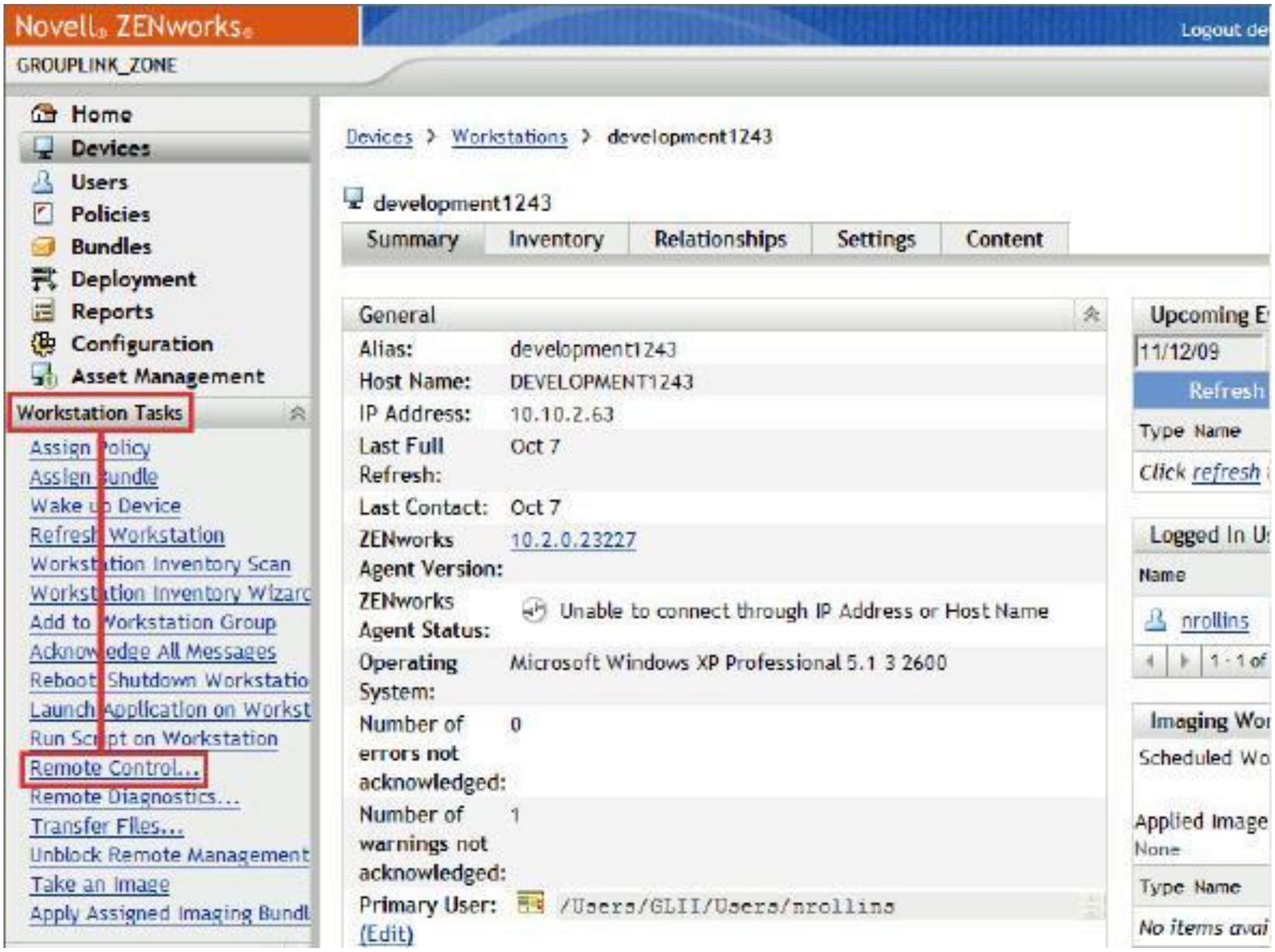
Figure 34

- If you want to search for assets other than the assets suggested you can use the text areas Asset Name, Asset Type, and Operating System.
- By clicking the Search button, a new list of assets begins to compile based on your search criteria. The new results will appear in the same window as the old ones.
- If you want to go back to the original suggested results, click on the Reset button.
- If you want to see all tickets already tied to an asset, click the Ticket Icon and a new popup window will appear with tickets that are already tied to the asset.
- Click the **Glasses Icon** to view a comprehensive description of the asset in the ZENworks Asset Detail Page.
- To tie the asset to the ticket and close the ZENworks Asset Search Page, click on the **Green plus Icon**. When a ZENworks asset is selected and tied to the ticket and the ticket is submit-ted, the asset name will be displayed as a link. When this link is clicked, the application will take you to the ZENworks Asset Detail Page.

ZENworks Remote Control

To remote control an asset using the **ZENworks Remote Control Piece** you will need to click on the **Glasses Icon** to pull up the ZENworks Asset Detail Page (***Figure 65***). You will then click on the Remote Control Link on the left-hand side of that page, below Workstation Tasks. This will enable you to use the ZENworks built-in remote-control piece; however, it will not log anything into the His-tory Comment Section of the ticket.

Figure 35



*e*HD's VNC Remote Control of ZENworks Assets

Once an asset is tied to a ticket and you have enabled *e*HD's VNC Client, the ticket will have a **Remote Control Icon** next to the asset. When the icon is clicked the application will launch the VNC Client for Remote Control. This will open as a pop-up window that will ask for a **VNC Client Password**; enter the VNC Password and the remote control session will begin. Clicking the **Remote Control Icon** will create a History Comment in the History Comment Section of the ticket saying that a remote control session was requested by a technician, including the technician's name, the date, and the time when the session was requested.

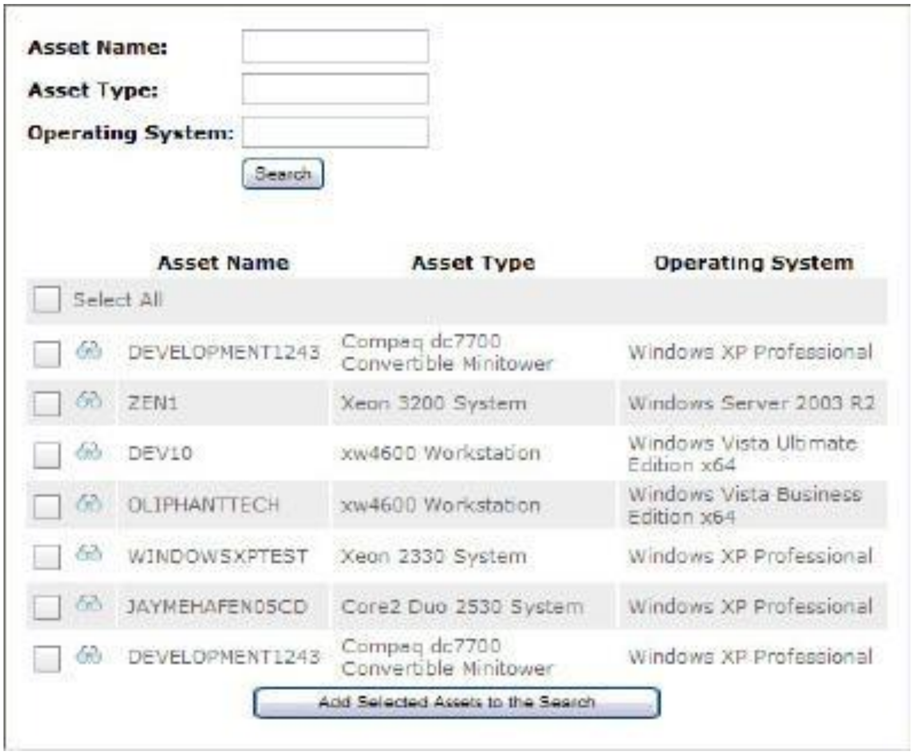
- Note: ZENworks' remote management policies must be configured to use password based authentication in order to work with *e*HD's VNC client. ZENworks version 10.1.2 needs to be installed for the VNC session to work with a regular VNC viewer. Also, you must have the Java plug-in installed for your browser to use the *e*HD VNC client. You can go to http://www.java.com to verify that you have it.

Reporting

To run reports on tickets associated with ZENworks assets, go to the ticket search.

- There is a Search Box at the bottom right of the Ticket Search that will allow you to type in the **ZENworks Asset Name** and add it to the search.
- You can also click on the **Magnifying Glass Icon** and it will pull up a **Search Dialogue Box** (***Figure 35***).

Figure 35



- The dialogue box has three text fields to search for assets: **Asset Name**, **Asset Type**, and **Operating System**. A list that meets search parameters will begin to compile. The **Glasses Icon** can also be clicked to view the asset's details.
- Once the desired asset is found, click on the **checkbox** and the **Add Selected Assets to the Search icon** and it will add the asset(s) to the bottom search area of the box.

  - If you want to search all assets, you can leave the search boxes blank and click on **Search**, click on the select all checkbox, and then add selected assets to the search.

- Once the search criteria have been selected, you will click the **Apply Filter icon** and the result will come in with the tickets that are tied to that ZENworks asset. The ZENworks Asset will act as a criteria item that the report can be grouped or regrouped by in the graphical reports section of the ticket search.

  - Note that the search box only has ZEN assets that have been tied to tickets.

ZENworks Reporting Enhancement

The order of ZENworks groups can also group and regroup in order to show searches with the top 10, 25, 50, 75, and 100 groups or regroups.

- An example of this would be to have the list show all closed tickets grouped by ZENworks Assets, showing only the top 25 selected.

These lists can be ordered by the greatest number of closed tickets tied to the asset, or can be ordered by the smallest number of closed tickets tied to the asset. This feature will make it so that Bar or Pie charts are succinct and proficient.

Knowledgebase

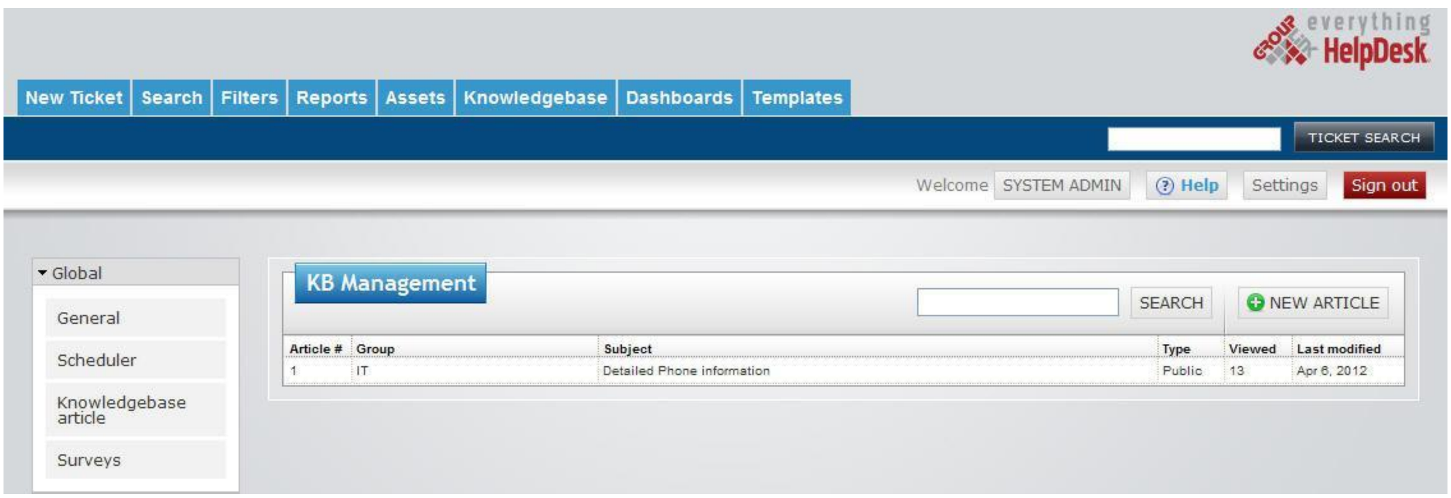
Knowledgebase (KB) articles are available on multiple subjects and offer additional information on subjects that pertain to your organization. These articles are created by Administrators, Managers, and Technicians as they see the need for the information.

Create a New Article

Locate the **Knowledgebase Article** window (***Figure 36***):

- Click on the Knowledgebase tab, then click the button or
- Click on the Settings button in the upper right corner, then **Knowledgebase Article** under **Global**

Figure 36



To create a new article:

- The **New Article** button will appear in the upper right corner of the page.
- Click **New Article** and you will be taken to a WYSIWYG page where you can create a new article. In the WYSIWYG editor, you can format text and attach files.

You can also create a new article from an existing Ticket.

- When a Ticket concerning a particular issue of interest is closed, a Convert to KB article button will appear (***Figure 37***)

Figure 37

- Click the Convert to KB article button and you will be taken to the same WYSIWYG page (***Figure 38***) to edit the Ticket Article.

Figure 38

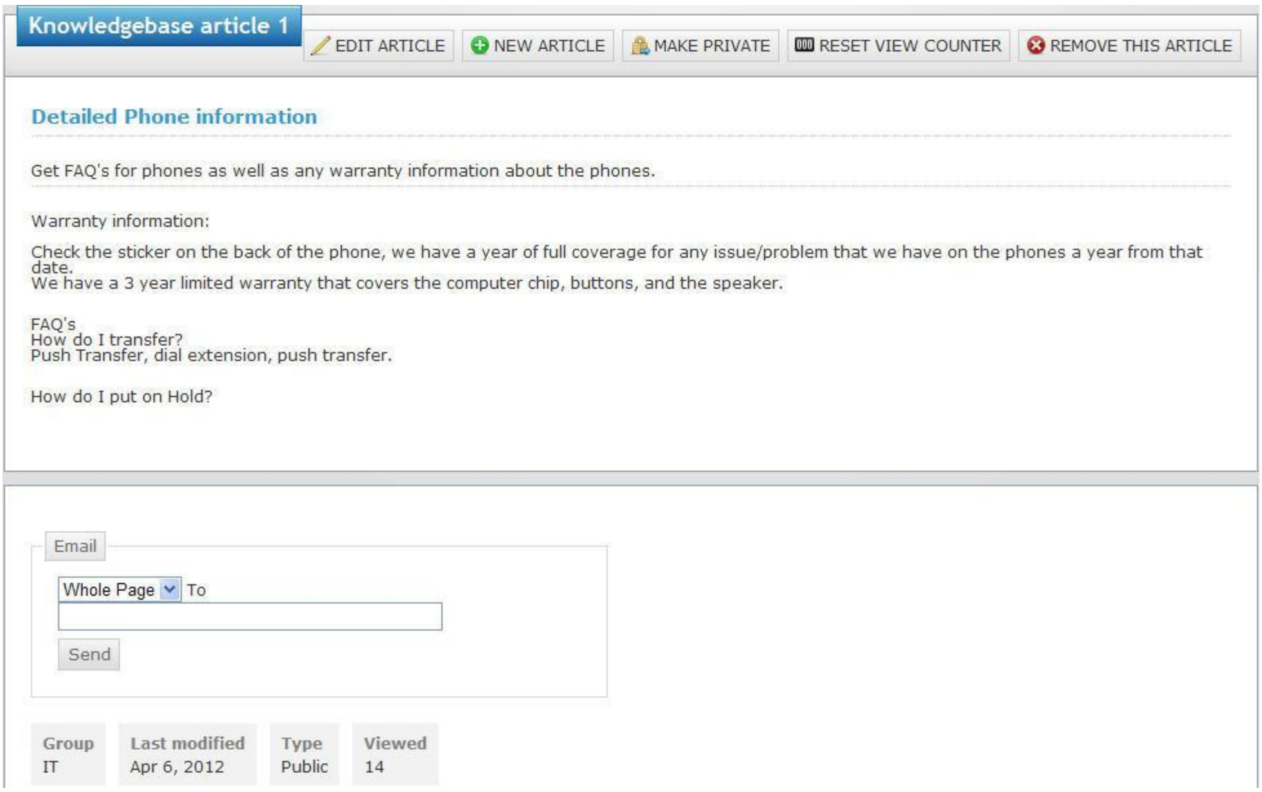
- Next, you have the option to make the article Private. To make the article private, select the check box next to the **Private** option. Once the article is made Private, only technicians and managers belonging to the designated group will be able to view the article.
- Assign the article to a group by selecting one from the **Group** drop-down.
- Once you have added the text for the article, click **Save & View**.

  - Note that you can click the Knowledgebase icon at any time to return to the Main/Search Results page.

Edit a Knowledgebase Article

- Locate the **Knowledgebase Article** window as directed above.
- Click anywhere on the row of the article you wish to edit.
- Once viewing an article (***Figure 39***), click **Edit article** in the top left corner of the article pane.

Figure 39



- The Edit article link will take you to a WYSIWYG page where you can make edits to the article. In the
  WSIWYG editor, you have the tools to format text and attach files.
- Click **Save & View** to save your changes and view your results.

Delete a Knowledgebase Article

- To delete the knowledgebase article, click **Remove this article** on the top right side of the article pane.
  - **Note**: The system will not ask you if you are sure you would like to delete the article. Removing the article will not allow you to retrieve it later.
- Click the Knowledgebase icon at any time to return to the Main/Search Results page.

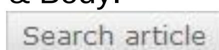
Make an Article Private

- Locate the **Knowledgebase Article** window as directed above. Edit the article, check the Mark as private box

Search for Articles

You can search for articles from the main page of the Knowledgebase screen. To locate this screen, click on the Knowledgebase tab on the menu. In this screen you will automatically see the top 10 viewed public articles. To view more articles, you may either navigate to the next set by clicking the next page in the bottom left corner or change the number of articles viewed per page in the bottom right corner. Once you have changed the number of articles viewed, the system will remember the number you have chosen next time you log in.

You can search for articles on specific subjects by using the search tools at the top of the KB screen.

- Select which group pertains to the articles you would like to find from the **Group** drop-down menu. If you would like to search all group articles, leave the group setting as **All**.
- Use the **Search** text box as a Google-type search, entering key words in the article you are searching for.
- Using the **in** drop-down menu, select whether you want the key words found in the Subject, Body, or both Subject & Body.
- Click the Search article button 

 to find the desired article(s).
- Once you have found the desired article, simply click on the article to bring it to full view. In full view, you have the option to **Email** the Whole Page or the Article Link to any email address for easy future access.

Dashboards

Dashboards are designed to harness the power of your saved Reports from the **Reports page** and display them visually using eight different types of Widgets (visual dials or charts used in your Dashboard). Before you start to create your dashboard, it is imperative that you create the Report in the **Reports page** that you want to have visually represented in a Dashboard.

- Examples of Reports are: All Open Tickets, Tickets by Location, or All Today's Modified Tickets Grouped by Category and Regrouped by Priority. For help creating Reports please see the **Re-ports** section of the help files.

Dashboard Management Page

The Dashboard Management Page is populated with the list of all the Dashboards that have been created in the system. If no Dashboards are listed and you would like to create one, click the NEW DASHBOARD in the top-right corner of the Dashboard Management Page. If Dashboards are listed in the Dashboard Management Page you will see, to the right of each dashboard, under **Action**, four icons. In order, they are **Launch**, **Edit**, **Copy**, and **Delete**.

- Clicking on the **Launch Icon** will start the download of a Java swing applet that opens up in a separate, resizable window for your dashboard viewing.
- Clicking on the **Edit Icon** will take you to the Edit Dashboard Page, allowing you to edit and resave your dashboard.
- Clicking on the **Copy Icon** will add a copy of that Dashboard to the Dashboard Management Page, allowing you to launch, edit, copy, or delete the copied Dashboard.
- Clicking the **Delete Icon** will bring up a prompt to confirm the deletion of that dashboard.

Dashboard Detail Page

To navigate to the Dashboard Detail Page, use one of the following steps:

- To create a new Dashboard, click the 

, enter a name for your Dash board, and click the **Save Changes** button. This will save the Dashboard's name and allow you to add Widgets (the visual dials or charts used in your Dashboard) to your Dashboard. (Clicking the **Cancel** button will take you back to the Dashboard Management Page.)
- If you click the **Edit Icon** to pull up a select Dashboard from the Dashboard Management Page, the Dashboard Detail Page (***Figure 40***) pulls up with a list of the individual Widgets being used in that dashboard. You have the ability to edit the dashboard's name as well as add, edit, or delete widgets in that Dashboard.

Figure 40

The Widgets are displayed in rows with column headers titled: **Widget Name**, **Row and Column Lo-cation** (which gives you the row and column location for that widget in the dashboard), **Column Span and Row Span** (which tells you how many rows and columns that widgets span in the dashboards grid), and **Action** (which has icons to edit and delete the widget). From here, you can do any of the following:

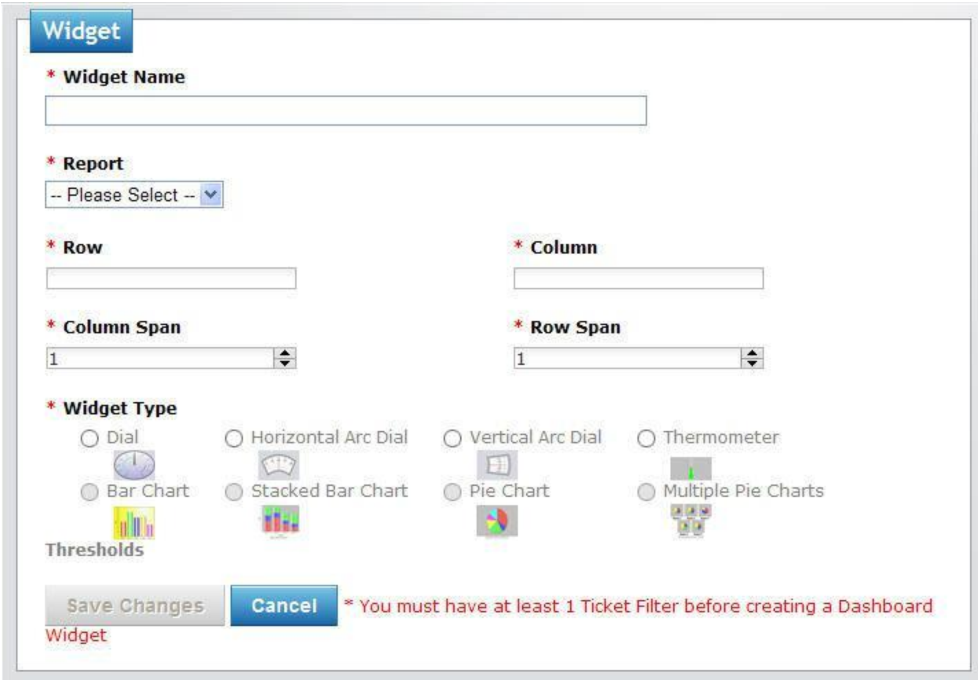
- To add a new Widget, click in the top right-hand corner of the page will take you to the Widget Creation Page where widgets can be created, saved, or edited. (See below section for details.)
- Click the **Edit Icon** for any Widget and you will be directed to the Widget Creation Page, where you can edit that Widget in the dashboard.
- If the **Delete Icon** is clicked, it will bring up a prompt to confirm the deletion of that widget.

At the bottom-left of the page is a **Save Changes** button which, when clicked, will save the dash-board and take you back to the Dashboard Management Page. Clicking the **Cancel** button will take you back to the Dashboard Management Page without saving any changes.

Widget Creation Page

If you are creating a new Widget, the Widget Creation Page (***Figure 41***) will pull up giving you the ability to name and create your Widget.

Figure 41



- Give your widget a name (or edit existing name)
- Once you have your widget named, select a Report from the **Report** drop-down list.
- Next, enter in the Widget's location in the Dashboard by **Row** and by **Column**.
- Select the **Column Span** and **Row Span** by using the up or down arrows to the right.

  • If you are making a Dashboard with only one widget then put 1 and 1 in the **Row and Column** boxes. If you are creating a Dashboard with four Widgets you will enter each Widget's location to be 4 different cells of a table: Row 1 Column 1, Row 1 Column 2, Row 2 Column
  1, and Row 2 Column 2.

- The next step in creating your Widget is to select the **Widget Type** you want to use to display your selected Ticket Filter's information. Hovering over the thumbnails of the different **Widget Types** will bring up a stored snap-shot of what that Widget looks like.

  • Note that some charts may be grayed-out if they are not compatible with the Ticket Filter you have selected.
  • Ticket Filters that are created to return simple ticket counts, like All Open Tickets, can only be displayed using the **Dial**, **Horizontal Arc Dial**, **Vertical Arc Dial**, or the **Thermometer**.
  • Ticket Filters that are created using the **Group Report By** option in the Create a graphical report of the Ticket Search, like All Open Tickets Grouped by Location, can be displayed using the **Bar Chart** and the **Pie Chart** Widgets.
  • Ticket Filters that are created using the **Group Report By** option and the **Regroup drill down information** by in the **Create a graphical report** of the **Ticket Search**, like Today's Modified Tickets Grouped by Category and Regrouped by Priority, can be displayed using

- After the **Widget Type** has been selected, the particular type will have a given set of **Thresholds** that need to be selected. These will appear under the **Thresholds** portion of the page after the **Widget Type** has been selected.

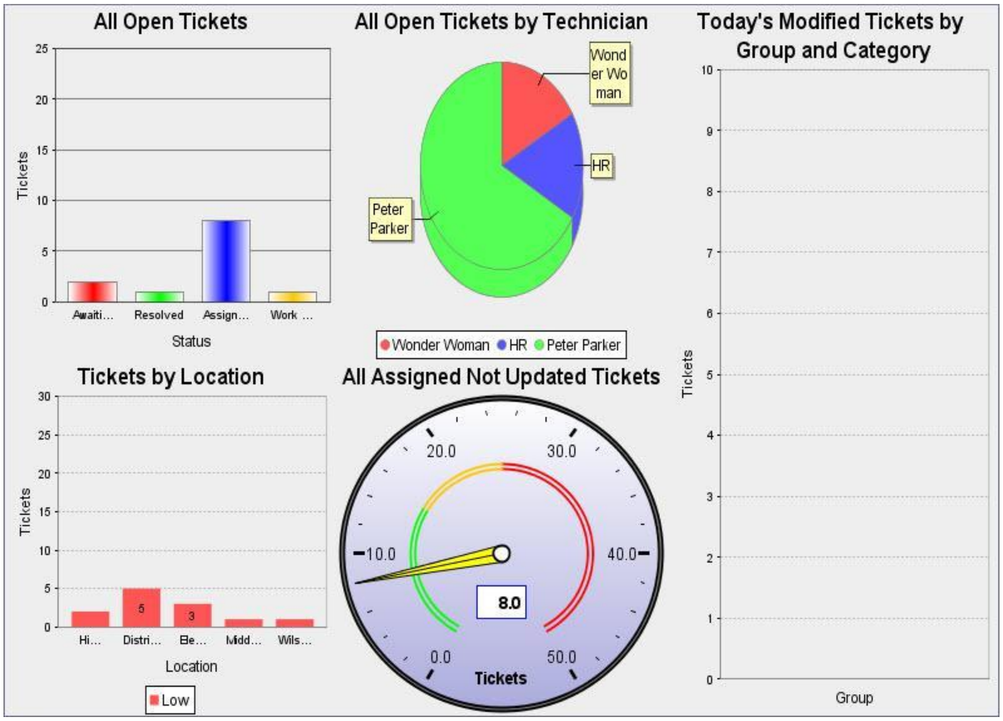
  - The threshold **Minimum Value** and **Maximum Value** must be entered, as well as the sub-parameters, depending on the **Widget Type**.
  - The **Dial** Widget has green, yellow, and red section of the dial that can have different thresholds. Example: green can indicate the okay range for open tickets and can be 0 – 25; yellow can indicate a warning level that open tickets are filling up in the system and can be 25 – 40; red can indicate a critical level and can be 40 – 60.
  - The **Thermometer** has the same green, yellow, and red levels; however, it also has a critical level that can be set at whatever level is needed. These are the Thresholds that need to be set depending on your company's needs and procedures.

- Once the **Thresholds** are set, click the **Save Changes** button to close the Widget Creation Page, adding that widget to the Dashboard Detail Page. The **Cancel** button will close the Widget Creation Page and return you to the Dashboard Detail Page without saving the Widget.

Launching your Dashboard

- To launch the Dashboard, click on the Dashboard tab. This will pull up the Dashboard Management Page with a list of all your system's Dashboards.
- In each Dashboard's row is a launch icon. Click this icon to launch that particular Dashboard. The application will automatically  start to download the Java swing applet.
- Once it is downloaded click on the **Run** button and the Dashboard will open in a separate, resizable window (***Figure 42***) that will update live every 20 – 40 seconds. This window can be maximized on a 60-inch screen or on a personal desktop.

Figure 42



- It is important to note that end users will be able to launch Dashboards; however, they will only be able to see the Tickets in that Dashboard they are the Contact for or those they have submitted. It is all based on the same rights and privileges as the **Ticket Search**.

Ticket Templates

Ticket Templates were designed to help implement your business processes, routine tasks, and requests directly in the application. You can create the template once and manually launch the Ticket(s) at any time, or you can set the Ticket Template to be launched on a specific day, week, month or year using the Recurrence function under the **Recurrence Tab**. You can also create a Ticket Template with multiple Ticket layers (Child Tickets) that can be launched automatically based on predefined Workflow. This gives you the ability to have the next Ticket or Tickets in the Template launch when the previous Ticket or Tickets has its status changed to the predefined status. This can be done in the **Workflow Tab**.

Ticket Template Management Page

The Ticket Template Management Page is populated with the all your system's Groups represented by Tabs (***Figure 43***). Each Group Tab is populated with a list of all the Ticket Templates created for that Group. Here they will be listed in alphabetical order. You can click on each Tab to see the different Ticket Templates for each Group.

Figure 43


IT | Maintenance/Facilities

Name	Structure	Action	Schedule
Phone Issues	1 Child Tickets		Recurrence not set

If you would like to create a Ticket Template, click on the NEW TICKET TEMPLATE in the top-right corner of the Ticket Template Management Page and you will be taken to the Ticket Template Detail Page.

If Ticket Templates are listed in the Ticket Template Management Page, you will see to the right of each, under **Action**, are four icons. In order, they are **Launch**, **Edit**, **Copy**, and **Delete** (Managers and Admin only).

Note: Only the Launch Icon will appear for Technicians and End Users.

- Clicking on the **Launch Icon** will redirect you to the **Pre-launch Page** where you can change any information in the Ticket Template's Tickets before launching them.
- Clicking on the **Edit Icon** will take you to the Ticket Template Detail Page, allowing you to edit and resave your Ticket Template and its Recurrence Pattern or Workflow.
- Clicking on the **Copy Icon** will add a copy of that Ticket Template to the Ticket Template Management Page, allowing you to launch, edit, copy, or delete the copied Ticket Template.
- Clicking the **Delete Icon** will bring up a prompt to confirm the deletion of that Ticket Template. Any Ticket Template can be deleted regardless of it being launched or not.

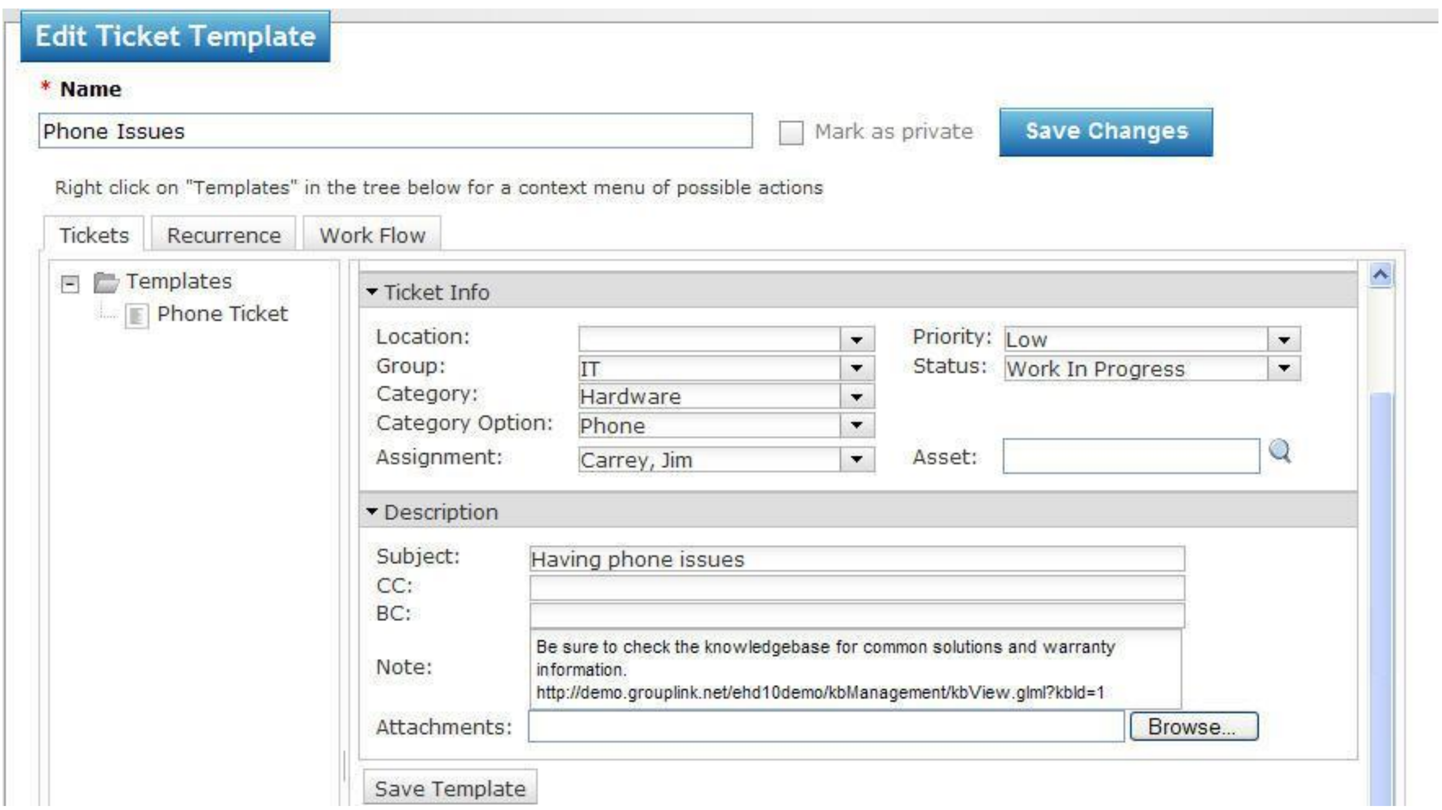
If a Recurrence Pattern is saved for a Ticket Template, a **Play Icon** will appear to the right under **Schedule.** To Play the Recurrence Pattern, click on the **Play Icon** and a **Circular in Motion Icon** will start playing. To Pause the Recurrence Pattern, click on the **Pause Icon** and the **Circular in Motion Icon** will stop playing and your Recurrence Pattern will be paused. If that Ticket Template has no Recurrence Pattern set, under **Schedule** it will say **Recurrence not set**.

Ticket Template Detail Page

If you are creating a new Ticket Template, the Ticket Template Detail Page (***Figure 44***) will pull up with a text field for your Ticket Template's name.

- Enter a name for your Ticket Template
- Decide if you want your Ticket Template to be **Private** (only the **Admin**, **Managers**, and **Technicians** will be able to launch it) or if you want to make it **Public** (**End Users** will be able to launch it). The **Mark as Private** checkbox will be checked by default, but may be unchecked to make the Ticket Template **Public**.
- Click the Save Changes button. Once the template is saved, three Tabs in the top left-hand side of the screen will appear: **Tickets**, **Recurrence**, and **Work Flow Tab**.

Figure 44



Tickets Tab

The **Tickets Tab** will be selected by default and the screen will be split into two sides. In the left-hand side of the screen there will be the start of a Tree-Diagram, or the hierarchical flow of the Ticket Template.

- To add a top tier Ticket to the Tree, right-click on **Templates** in the Tree-Diagram. This will reveal a menu with the options to **Add a New Template**. Clicking this option will pull up a pop-up window that asks you to name your Template.
- Give the Template a name and click the **Save Changes** Button or click the X in the upper, right corner to exit the pop-up without adding a New Template.
- After you've clicked the **Save Changes** Button the pop-up window will close and the Ticket name will be added in the Tree-Diagram.

Clicking on the Ticket name in the Tree-Diagram will populate the right side of the screen with a blank Ticket. This blank Ticket can be filled out so that, when it is launched, all the information entered and saved will be in the Ticket. The flow of the Ticket Template works the same way as filling out a normal Ticket. You can enter the Contact and Location and all other information as you would when filling out a new Ticket. If you want Custom Fields on the Ticket, they will appear based on the Category Option you select. You can tie an Asset to the Ticket. You can also add attachments to the Ticket in the Template or any detailed instructions that are necessary. (Attachments can be deleted from Ticket Templates by clicking on the Delete button next to the attachment in the Ticket.)

When you are done filling out the information for that Ticket, click the **Save Template** button at the bottom of the screen.

The next step in filling out the Ticket Template is to decide the different steps you want in your Ticket Template.

- To add another Ticket to the Template at the same level as your first, right-click on the head Template in the Tree-Diagram and click on **Add a New Template**.
- If you would like to add a Sub-Ticket to one of your Tickets in the Ticket Template, right-click on the Ticket and a menu will appear with the option to **Add a New Template**. Clicking on this will add a new Ticket beneath the previous Template, making it a Sub-Ticket.

    • Also, in the menu are to other options: **Rename This Template** and **Delete This Template**. Clicking on **Rename This Template** will pull up the **Template Name** box allowing you to change the name. Clicking on **Delete This Template** will pull up a **Confirmation** box asking you if you are sure you want to delete the template. If you want to delete the Ticket click **OK** and the box will close and the Ticket will be deleted from the Template. If you click **Cancel**, the box will close and nothing will take place. This is the process you follow to create a Ticket Template.

An example of a Ticket Template is that of a New Hire Process.

- The first Ticket could be Setup Workstation, this Ticket would have information necessary to setup the new hire's workstation: desktop computer, laptop, cell phone, etc. This Ticket would be sent to a Technician in the I.T. department. However, the application allows for Ticket Templates to be sent to different departments in the organization allowing you to truly implement your business processes.

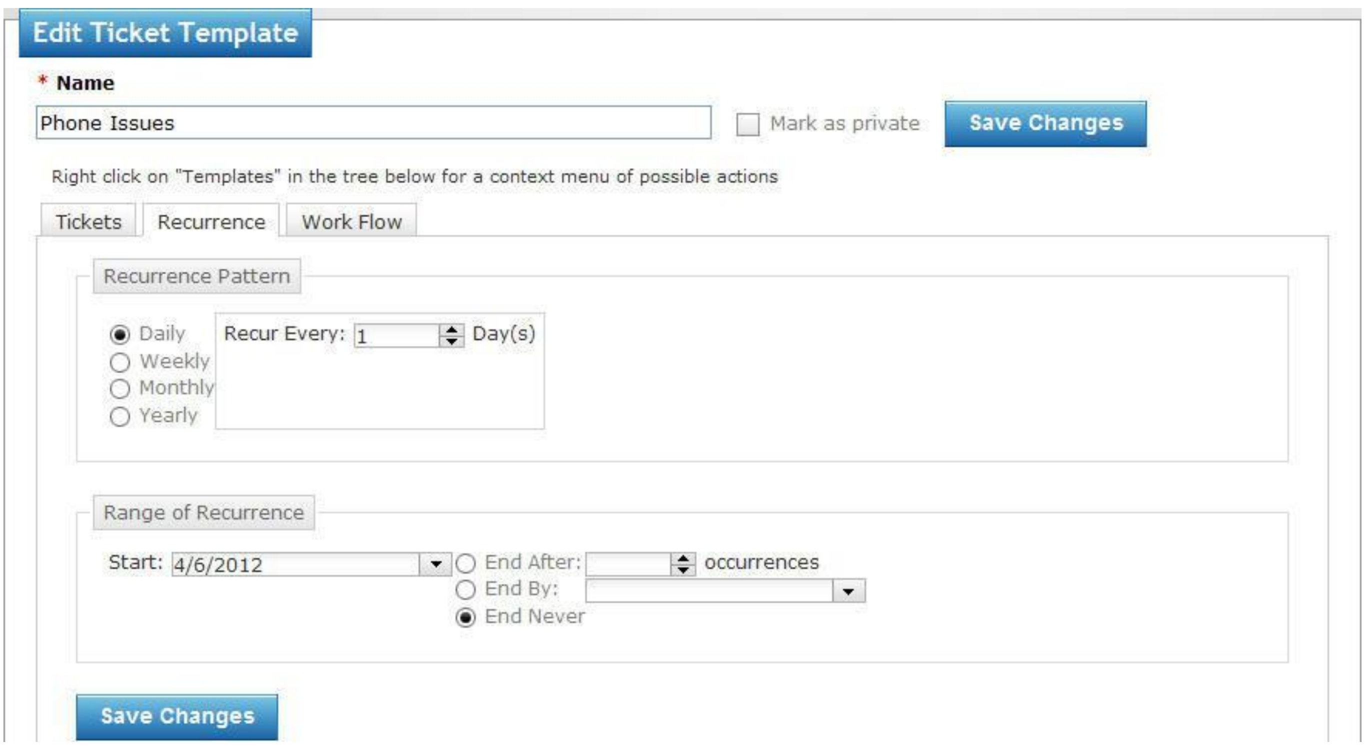
- The next Ticket can be Setup Software. This Ticket would have information necessary to setup the user email client and any internet rights and so forth that the new hire would have.
- The next Ticket would be Train on Policies followed by the last Ticket, Manager's Final Approval.

If you are editing a Ticket Template's information, you can simply walk through the Tree-Diagram on the left-hand side of the screen and add, delete, or rename Tickets in the Template. You can also click on each Ticket to pull up the Ticket in the right-hand side of the screen to edit any of the Ticket's information. Be sure to save any changes to each Ticket by clicking on the **Save Template** Button at the bottom of the Ticket.

Recurrence Tab

If you would like to create a Recurrence Pattern for your Ticket Template that will automatically launch the Ticket Template, click on the **Recurrence Tab**. Clicking the **Recurrence Tab** will fill the screen with the Recurrence Pattern options (***Figure 45***). You can set a **Recurrence Pattern** as a **Daily**, **Weekly**, **Monthly**, or **Yearly** occurrence, by clicking on the Radio Button next to the **Daily**, **Weekly**, **Monthly**, or **Yearly** options.

Figure 45



- Clicking on the **Daily** Radio Button will allow you to select the Ticket Template to recur every 1, 2, up to every 365 days.
- Clicking on the **Weekly** Radio Button will allow you to select the Ticket Template to recur every 1, 2, 15, or as high as 365 weeks, on any day or days of the week. The days of the week can be selected by checking the checkboxes next to the day or days of the weeks you would like the Ticket Template to be automatically launched.
- Clicking on the **Monthly** Radio Button allows you to automatically launch the Ticket Template in one of two ways.
  - You can launch the Ticket Template on Day 1, 2, or 31st of every 1, 2, or 50th month. This can be done by clicking the Radio Button next to this option.

- Clicking on the **Yearly** Radio Button allows you to automatically launch the Ticket Template in one of two ways.

    - You can launch the Ticket Template on day 1 – 31 of months January – December. This can be done by clicking the Radio Button next to this option.
    - You can also launch the Ticket Template on the First – Fifth, Sunday – Saturday of the months January–December. This can be done by clicking the Radio Button next to this option.

You can set the **Range of Recurrence** for your Ticket Template's **Recurrence Pattern** to start on any date you want by clicking on the **Start** field and pulling up the Date Picker Calendar. You can have the range end in one of three ways:

- It can end after 1-999 occurrences, which can be selected by clicking on the **End After** Radio Button
- It can end after a selected date by clicking on the **End by** Radio Button and picking a date from the Date Picker Calendar
- It can end never, by clicking on the **End Never** Radio Button

When you are done setting your **Recurrence Pattern** and **Range of Recurrence** the application will run from to automatically launch the Ticket Template, you can save it by clicking on the **Save Changes** button. At any time, you can navigate away from the page and your changes will not be saved.

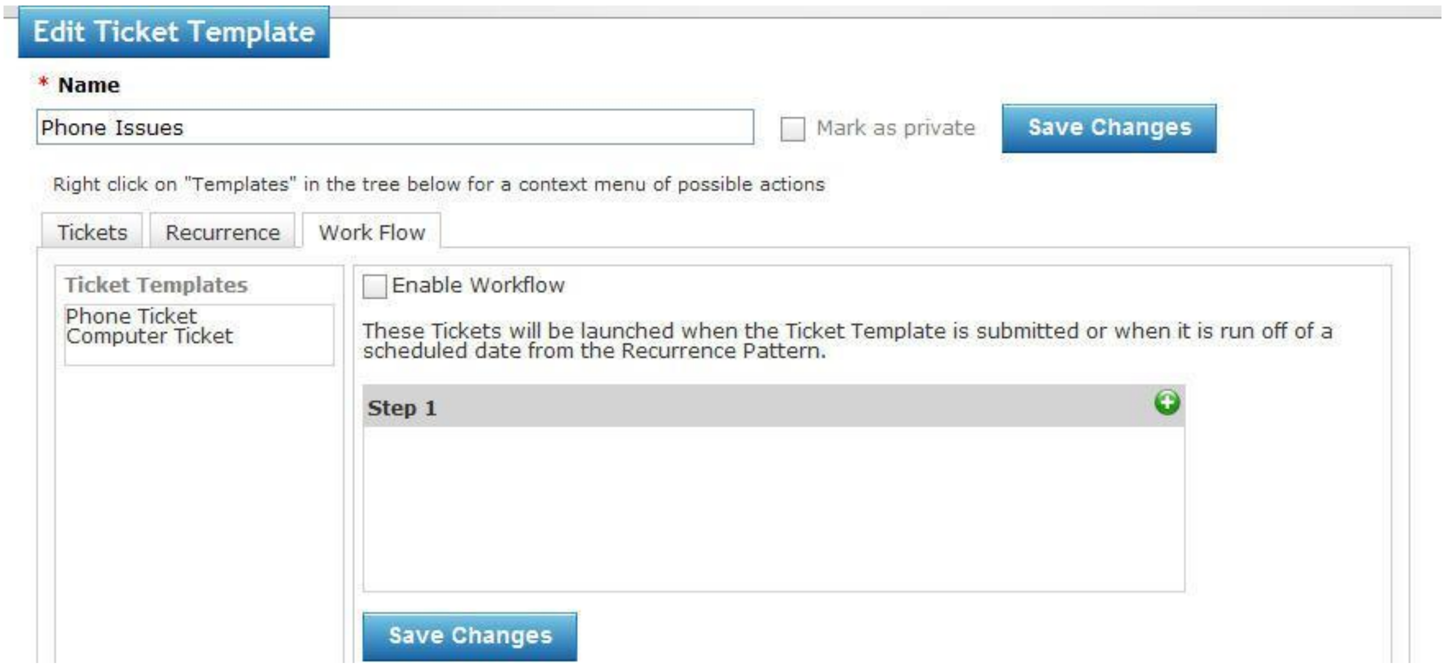
An example of the Recurrence Pattern would be to set your Preventive Maintenance Ticket Templates for each building on a Recurrence Pattern that will automatically launch the Ticket Template on the First day of January every year, starting with January 1, 2012 and ending never.

If you are editing a Ticket Template's Recurrence Pattern you can click on the tab and make any changes you would like. You can save your changes by clicking on the **Save Changes** button. If you don't want to save any of your changes, simply navigate away from the page.

Note: Ticket Templates running on a **Recurrence Pattern** will launch at 2:01 a.m. the morning of the date selected.

Workflow Tab
If you would like to add Workflow to your Ticket Template that will automate your process click on the **Work Flow Tab**. The left-hand side of the screen will populate with all the Tickets in the Ticket Template. The right-hand side will populate with a page containing an **Enable Workflow** Checkbox and **Step 1** of your workflow process (***Figure 46***).

Figure 46



- If you would like to enable the Workflow you create for your Ticket Template you can check the checkbox by clicking on it. Once you have enabled Workflow each Ticket from the left-hand side of the screen can be clicked and dragged over into a Step on the right-hand side of the screen.
  You can disable the Workflow for a Ticket Template at any time, without having to erase it, simply by unchecking the checkbox.
- By default, there is only one Step on the screen. To add another step, click on the **Add** icon . This will add **Step 2** to your workflow and cause a **Step Completed Status** Dropdown to appear under **Step 1**. You can have as many Steps as you would like. You can also delete your Steps by clicking on the Delete icon
- Drag the Tickets from your Ticket Template that you want to be part of the first step. These Tickets will be launched when the Ticket Template is manually launched or when it is run off of a scheduled date from the Recurrence Pattern.

  - You can multi-select how many Tickets you can drag at a time by using the Shift or Control Key on your keyboard.
  - If you accidentally dragged a ticket that should not be in that Step, simply drag it back over to the left side of the screen.

- Next, choose which **Step Completed Status** you would like all the Tickets in **Step 1** to be changed to. Do this by clicking the dropdown box and click the Status you would like to choose. When all tickets in **Step 1** have reached this Status, the Tickets in **Step 2** can be automatically launched.
- Next drag over all the Tickets that you would like to have launched in **Step 2**. Continue to add as many Steps to your Workflow pattern as needed.
- When you are done created your workflow for the Tickets in your Ticket Template click on the **Save Changes** button at the bottom of the page.

An example of a workflow pattern can be that of a New Hire.

- The first step in the New Hire process, Setup Workstation, can be launched in the first Step.
- When that Ticket's Status is changed to Resolved it will launch the Setup Software Ticket in Step 2.
- When the Setup Software Ticket is changed to Resolved it will launch the Train on Policies Ticket.

  • You could also have the Setup Software Ticket and the Train on Policies Ticket launched at the same time in Step 2.

- When the Train on Policies Ticket is changed to Resolved it will launch the last Step, which is Manager Approval.

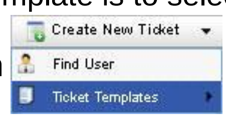
You can edit the Workflow of any Ticket Template by clicking on the **Workflow Tab** and editing which Tickets are launched in which steps are adding or deleting steps from the process. When you have finished making your edits, click the **Save Changes** button. If you don't want to save any of your changes, simply navigate away from the page.

Once you have created, or edited, your Ticket Template and added any desired Recurrence Pattern and Workflow you can save the whole Ticket Template in the **Ticket Template Detail Page** by clicking on the **Save Changes** button.

Pre-Launch Page

Ticket Templates will be automatically launched from the application if they have a Recurrence Pat-tern created and saved. But Ticket Templates can also be manually launched in two ways.

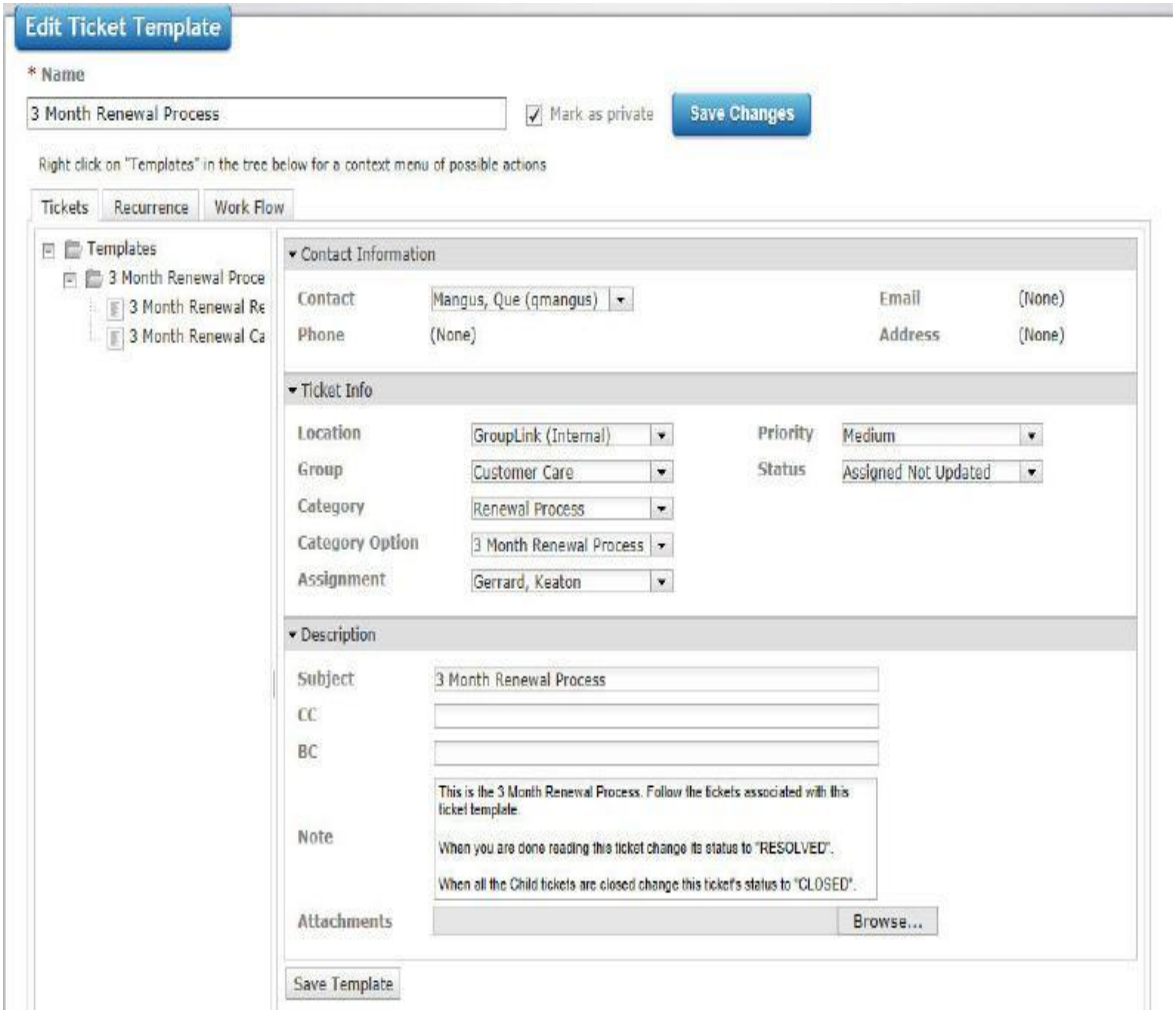
- The first way to manually launch a Ticket Template is to select the **Ticket Template** option

under the Create New Ticket multi-action button 

on the top left-hand side of the My Ticket Screen.

  • Hover over the arrow on the **Ticket Template** option to reveal all the groups that have Ticket Templates created for them. Hover over a Group in the dropdown and it will reveal the Ticket Templates that have been created for that Group. They will be listed in alphabetical order.
  • Click on the Ticket Template you desire to launch and that Ticket Template will appear in the Ticket Template Pre-Launch Page.

For each Ticket Template, under **Action**, there is a **Launch Icon**  . When the icon is clicked, that Ticket Template will open in the **Ticket Template Pre-Launch Page** (***Figure 75***). Note that you will not have access to the Recurrence Tab or the Workflow Tab in the Ticket Template Pre-Launch Page.



When Managers navigate the Ticket Template Management Page, they will be able add, edit, copy, and delete Ticket Templates as well as launch them. Technicians will only be able to launch Ticket Templates from this page. An End User will only be able to see and launch Ticket Templates that have been marked Public.

Ticket Template Launch

Once the Ticket Template has been opened in the Ticket Template Pre-Launch Page, the head Ticket in the Template will be opened on the right-hand side of the screen with the Tree-Diagram on the left-hand side of the screen.

- If the contact information of the Tickets in the Ticket Template is empty, they will automatically fill with your information. You may change the contact information if you are launching the Ticket Template for another user.
- Navigate through the Tickets in the Ticket Template and make any changes that are desired to the Template including adding comments, new contacts, or tying assets. Be sure to save all the changes to each Ticket before you navigate to another Ticket in the Template. In the head Ticket of the Template you will see a **Copy this Contact to all sub tickets** icon next to the **Contact** field. This allows you to apply the change in the Contact name to all the Tickets in the Ticket Template. To do this, simply change the Contact in the head Ticket Template and click the **Apply to all Icon**.
  - There are also Edit User and User Accounts icons which can be used for the same purposes as the same icons on a regular Ticket. For more information about these icons, see the **Creating a Ticket** section.
- When you are done making changes to the Ticket Template, click the **Launch Button** in the top right-hand corner of the screen. Clicking on the **Launch Button** will launch the Ticket Template and give you a visible confirmation (Tickets Launched Successfully). For the launch to be successful, all of the fields that are required to submit a Ticket must be filled out in every
Ticket of the Template.
- If you decide not to launch the Ticket Template simply click on the **Abort Button**. Clicking on the **Abort Button** will pull up a **Confirmation** box asking you if you really want to abort the launch. If you want to abort the launch click **OK**. You will then be taken back to the Ticket Template Management Page. If you don't want to abort the launch, click the **Cancel** button.
  - It is important to note that all Tickets in the **Ticket Template Launch Page** will become rogue Tickets if they are not launched or aborted from the Ticket Template Launch Page. These rogue Tickets will only take up space in your Database. They will not show up in the system or affect any reporting.

Global

Locate the **Settings** window

- Log in under the Administrator account
- Click on the **Settings** button in the upper, right-hand corner (***Figure 47***)

Figure 47

Under the Global section of the left-hand menu are the following options:

- User Accounts
- Scheduler
- Knowledgebase article
- Surveys

User Accounts

Under the User Accounts section New Users can be added or existing user can be edited.

- To **setup** a new user, click the **New User** button in the upper right corner.
- To **edit** an existing user, click the under Actions
- To **delete** a user, click the under Actions

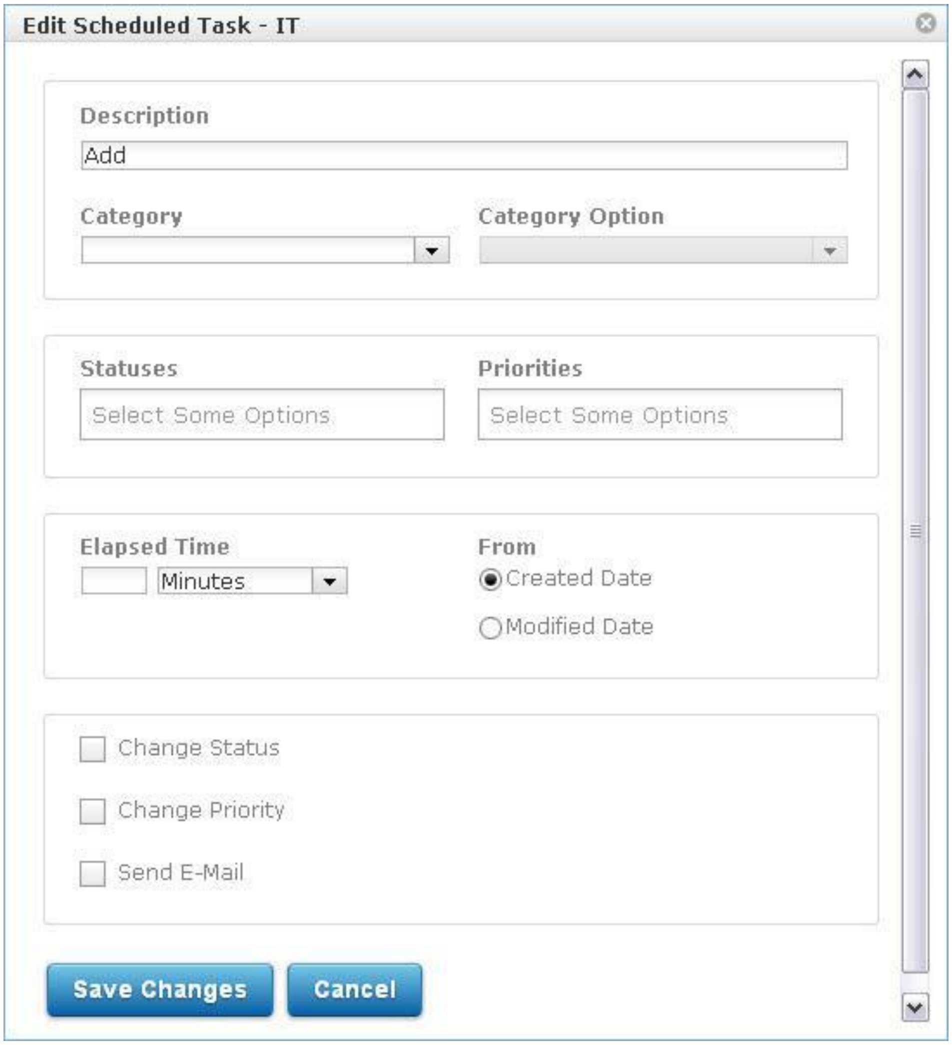
Scheduler

The Scheduler tool is used for processes that are done in your organization over and over again. It uses the power of a specified schedule to assign tasks necessary for the organization to function properly.

Create a New Scheduled Task

- Select the Add Schedule button on the Scheduler screen to open the Add Scheduled Task pop-up window.

Figure 48



- Enter a task description in the **Description** field.
- Select a Status or Statuses from the **Status** drop-down list. This is the status of the ticket that you are creating a scheduled task for.
  - You can select multiple statuses by using the Shift or Control key on your keyboard.
- Select a Priority or Priorities from the **Priority** drop-down list. This is the priority of the ticket that you are creating a scheduled task for.
  - You can select multiple priorities by using the Shift and Control keys on your keyboard.
- Enter a number in the **Elapsed Time** field. This will specify when the task will start running. You can select minutes, hours, days or weeks from the drop-down list.
- Select the radio button corresponding to either the **Created Date** or **Modified Date**. This option will specify when the task will start running based on the Elapsed Time field.
  - For example, if you put 1 day in the Elapsed Time field, then select **From Modified Date**, the scheduled task will start running 1 day after the ticket is last modified.

- Finally, select an **Action**. This is what you want to happen after the scheduler starts running. It is possible to select more than one action for the scheduler to complete.
    - If you select **Change Status**, select a status from the drop-down list.
    - If you select **Change Priority**, select a priority from the drop-down list.
    - If you select **Send Email**, fill out the appropriate fields based on what you would like to happen. You can edit the subject and message fields with customized information. You can also pull fields from the ticket that you would like to have go out in the email from the Scheduler including the option of a **Show Ticket** link.
        - Insert the field code into the Subject Line or Message. The field codes can be found by clicking on the grey **Show Tags** link under the email message box.
        - Find the field you want pulled from the ticket and copy and paste the field code into either the subject or the message of the email.
        - After entering the email details, select a frequency. The frequency specifies how often the email will get sent.
- The scheduler will allow you to schedule automatic updates based on ticket status, priority, or elapsed time. You can set up an action such as send email, change status or change priority based on your specifications.
    - For example, you can have a reminder email sent to a Technician if their ticket has been open for 2 days with status “Assigned-Not Updated.”

Knowledgebase article

The Knowledgebase article button will take you to the KB Management page which is described in the **Knowledgebase** section of the Help Files.

Surveys

Surveys are designed to gauge and track the efficiency of your team’s ability to resolve the issues being tracked through the *e*HD application and your customer’s satisfaction in this process. Whenever a ticket is closed (under a Group, Category, or Category Option that has an activated or enabled sur-vey) an email will be sent out to the contact on the ticket. The email says:

“Thank you for using the HelpDesk system. In order to improve performance and user satisfaction we would like you to complete a short survey at:

User Survey

“Thank you for your time.”

User Survey is a link to the Survey. One important thing to note is that the link is based on the **Base URL** in the **Application Configuration Tab** under **General Link**, so make sure that it has the URL you want to use.

- Clicking on the **User Survey** link will open the browser (or a new tab in the browser), and the survey will contain the following three questions:

- **Was your ticket answered? No Yes**
- **Was your ticket answered in a timely manner? No Yes**
- **Please rate your experience on a scale of 1 to 5, 1 being unsatisfactory, and 5 being excellent: 1 2 3 4 5**

- The contact will enter their responses and click **Submit**. The page will then display a thank you message.

  - If the user (contact) answered No to the question, **was your ticket answered?** An email will be sent to the Manager of the Group and to the Technician the ticket is assigned to telling them the user stated that his or her ticket was not answered. This will give the manager and the technician the opportunity to quickly correct the issue.

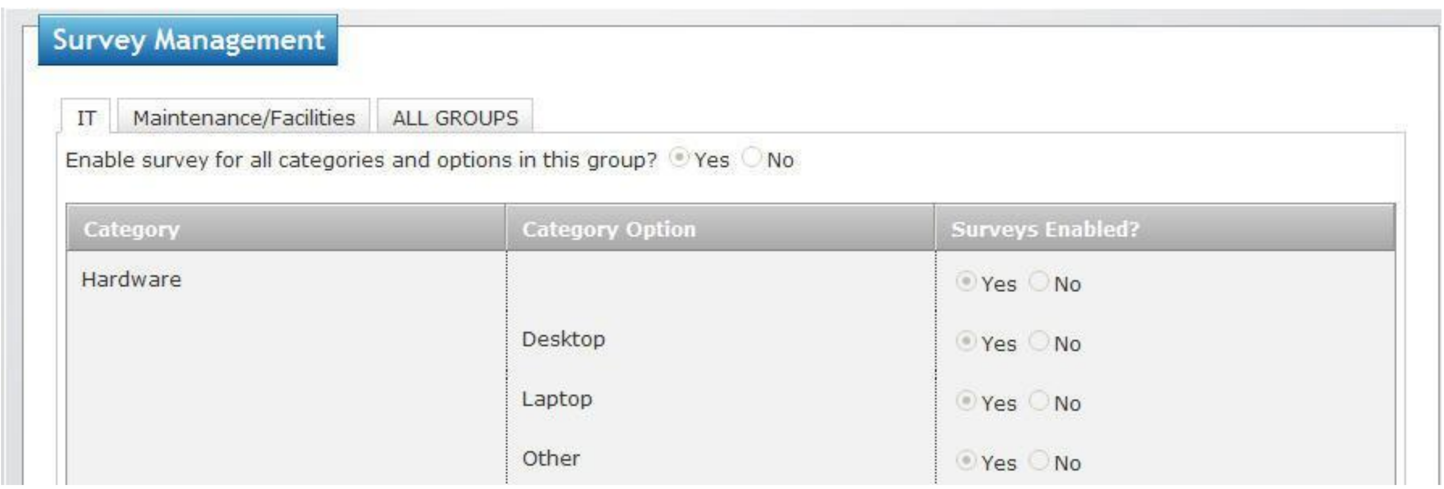
- All survey results are available to search in the new ticket search.

  - For example, you can search to see which tickets were given a 5 rating, or which tickets were not answered in a timely manner.

Enabling Surveys for all Groups, Categories and Category Options

- Click the settings button, under **Global,** and select the **Surveys** link. Doing this will bring up the Surveys page (***Figure 49***).

Figure 49



- The top of the page has tabs that represent the different Groups for which you can activate Surveys. By default, the far-right tab, **All Groups**, will be selected and a question will be visible under the tabs that reads, **Enable survey for all groups, categories and options?**
- On the right of this question are two radio buttons. If you want to enable surveys for all of your groups, categories and options, click on the **Yes** radio button.
- If you do not want to enable surveys for all Groups, Categories, and Options, click on the **No** radio button.

Enabling Surveys for Specific Groups, Categories and Category Options

- If you wish to enable surveys for a specific Group only, be sure the No radio button is selected in the All Groups tab.
- Click the **Group** tab for the group you wish to enable surveys for. Doing this will bring up all the Categories and Category Options pertaining to the selected Group.
- There will be a question asking if you want to **Enable survey for all categories and options in this group?** On the right of this question will be two radio buttons.
    - If you wish to enable the surveys for all of the categories and category options in the selected group, click on the **Yes** radio button.
    - If you don't want to enable surveys for all of the Categories and Category Options in this Group, leave the **No** radio button selected. The No radio button is the default for surveys in the application.
- If you want to enable surveys for specific Categories or Category Options, click the **Yes** radio button next to the name of the desired Category or Category Option. Each Category and Category Option can be independently selected, which gives you the option of enabling surveys for some or none of the Categories and Category Options.
- When you have clicked on the **Yes** radio buttons next to the Categories and Category Options you wish to enable surveys for, click on the **Activate Selected Surveys** button.
- Clicking this button will bring up a confirmation stating that **Surveys have been successfully activated for selected groups, categories and options**.
- Once you have enabled surveys for all the Groups, Categories, and Category Options you want, you can exit the surveys page by clicking on one of the eight tabs in the left corner of the *e*HD window.

System

Locate the **Settings** window

- Log in under the Administrator account
- Click on the **Settings** button in the upper, right-hand corner

Under the System section of the left-hand menu are the following options:

- Global
  - User Accounts
  - Scheduler
  - Knowledgebase Article
  - Surveys
- System
  - General
  - LDAP
  - Mail
  - Collaboration
  - ZENworks 10-11 Configuration
  - Database Connection
  - Licensing
- Ticket
  - Locations
  - Groups
  - Assignments
  - Custom Field Setup
  - Statuses
  - Priorities
- Permissions
  - Global Permissions
  - Permission Models

Everything but the User Accounts section will be set up using the ICA Guide.

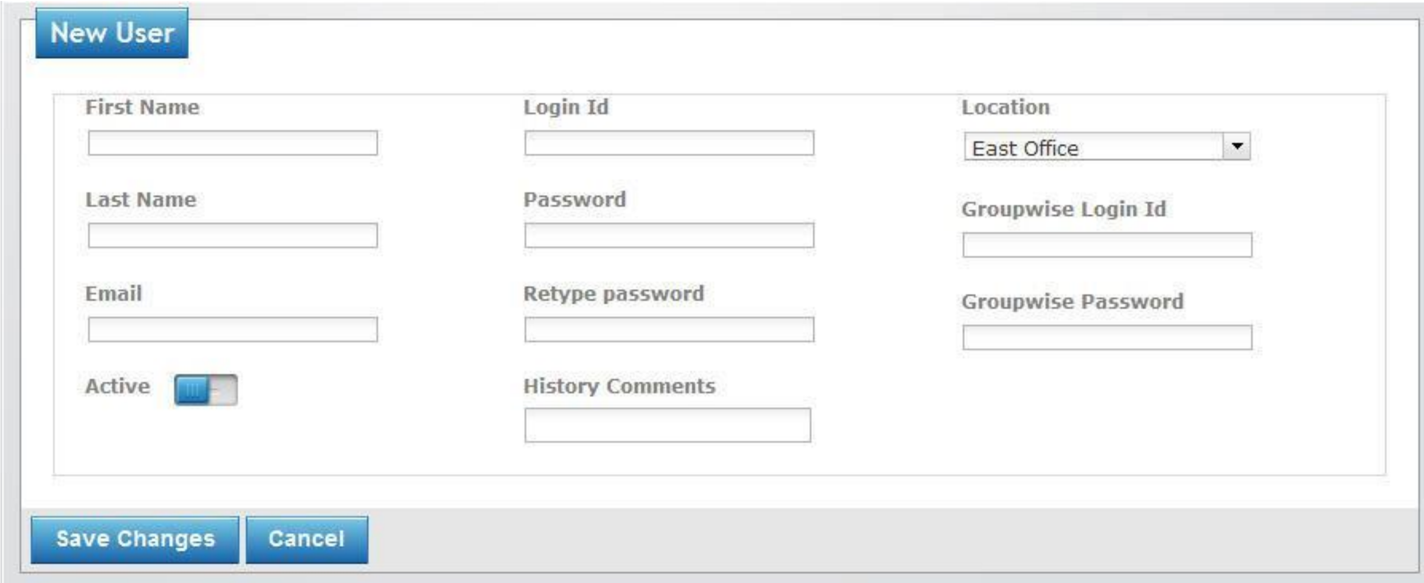
User Accounts

The User Accounts section is where you will find the list of all users in your organization's *e*HD database.

To search your User Accounts, click in the Search box at the top of your User Accounts list and use it as a Google-like search to find any account. You can also sort your User Accounts in ascending or descending order by clicking the header of the column which you would like to sort by.

Create a New User
To add a user, click the **New User** button at the top of the User Accounts list. A new user form (***Figure 50***) will pop up.

Figure 50



Fill out the user form with all of the new user's information. When you are done, click **Save Changes**.

For more detailed information, see the **Understanding User Roles** section of the Help

Files. **Edit a User's Information**

To edit a user's information, click the  icon under Actions. A user form similar to ***Figure 36*** will pop up with all of the user's information.

- Edit this form as desired, and then click **Save Changes**.

Delete a User
In the User Accounts window, you will see a list of users.

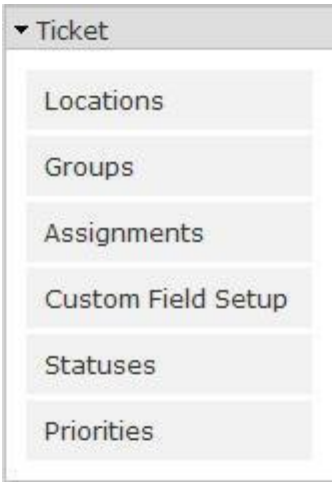
- Click the  and a confirmation screen will appear, asking you: "**Are you sure you want to delete this item?**"
- Click **OK** to delete the User or **Cancel** to go back to the User Account window.

Ticket Management

Locate the **Settings** window

- Log in under the Administrator account
- Click on the **Settings** button in the right menu (***Figure 51***)

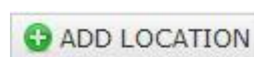
Figure 51



Under the Ticket section of the left-hand menu are the following options:

- Locations
- Groups
- Assignments
- Custom Field Setup
- Statuses
- Priorities

Add a Location

- To add a Location, click the Location button under Ticket and then the 

above the Location List pane. A popup screen will appear with two fields: **Name** and **Comments**.
- Name your Location in the **Name** text field. The name will appear in the far-left column of the Location List.
- In the **Comments** text field, you may write a brief description of the Location you are creating. The description will appear in the middle column of the Location List. Note that the Comments text field is not a required field.
    - An example of a Location would be a group of satellite offices or buildings such as District Offices, Elementary School, Middle School, or High School.
- When you've entered the information for the new Location, click the **Save Changes** button. This will add your Location to the Location List.

Edit a Location

- To edit a Location, click the edit icon at the far right of each row. The edit window will pop up with the Name and Comments fields. Change either of these fields as desired.
- Click **Save Changes** to save your changes or click **Cancel** to go back to the Group Settings window.

Delete a Location

- To delete a Location, click the delete icon at the far right of each row. A window will pop up asking “Are you sure you want to delete this item?”
- Click **Yes** to delete the Location that you have selected or **Cancel** to make no changes and go back to the Group Settings page.

Add a Group

- To add a Group, click **Groups,** then in the right corner. A popup screen will appear with two fields: **Name** and **Description**.
- Name your Group in the **Group Name** text field. This is the name that will appear in the far-left column of the Group List.
- In the **Comments** text field, you may write a brief description of the Group you are creating. This will appear in the middle column of the Group List. Note that the Comments text field is not a required field.

    • An example of a group may be the IT department in your company. The Name would be IT and Information Technology would be the Comment.

- When you’ve entered the information for the new Group, click the **Save Changes** button. This will add your Group to the Group List. Click **Cancel** if you do not wish to save the group.

Edit a Group

- To edit a Group, click the edit icon at the far right of each row. The edit window will pop up with the Name and Description fields, Categories and Category Options as well as Group
  Roles. Change any of these fields as desired.
- Click **Save Changes** to save your changes or click **Cancel** to go back to the Group Settings window.

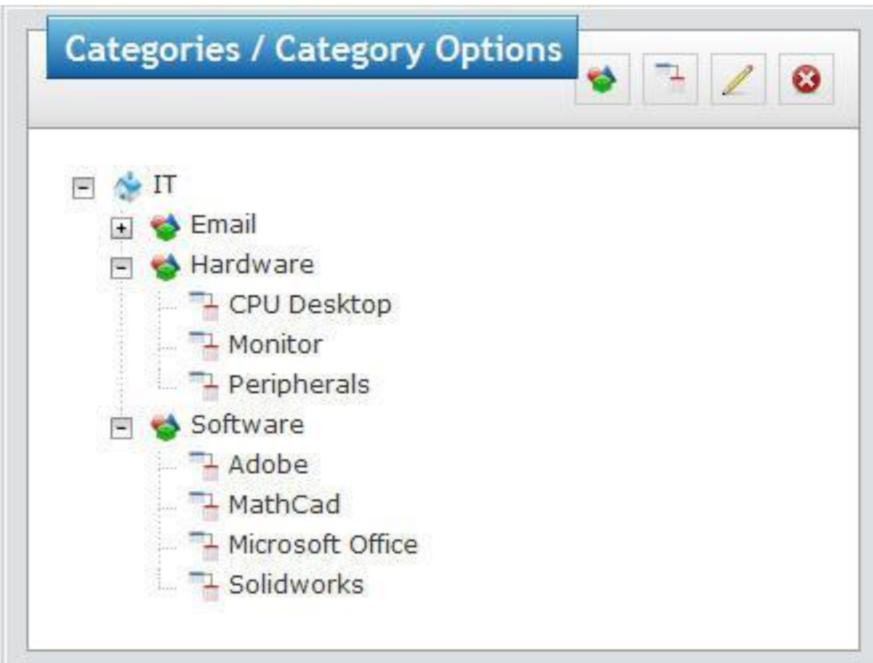
Delete a Group

- To delete a Group, click the delete icon at the far right of each row. A window will pop up asking “Are you sure you want to delete this item?”
- Click **Ok** to delete the Group you have selected or **Cancel** to make no changes and go back to the Group Settings page.

Create a New Category

- A Category must be assigned to a Group. First, select a Group from the Group list for which you would like to add a new Category.
- Next, click the edit icon under Actions. A new Ticket Settings pop-up window will appear

Figure 52



- Click the New Category icon and enter the name of the New Category.
- Click **Save Changes** to finish creating your new Category or **Cancel** to return to the **Ticket Settings** window.
- Your new Category will now appear under the **Category/Category** O**ptions** window.

Change a Category's Name

- If you want to change the name of a category, click on the category name.
- Once you have clicked the desired category, click on the edit icon next to the **Category/ Category Options** heading. A new Ticket Settings pop-up window will appear.
- Type in the new category name and click **Save Changes** or **Cancel** to return to the **Ticket Settings** window.

Delete a Category

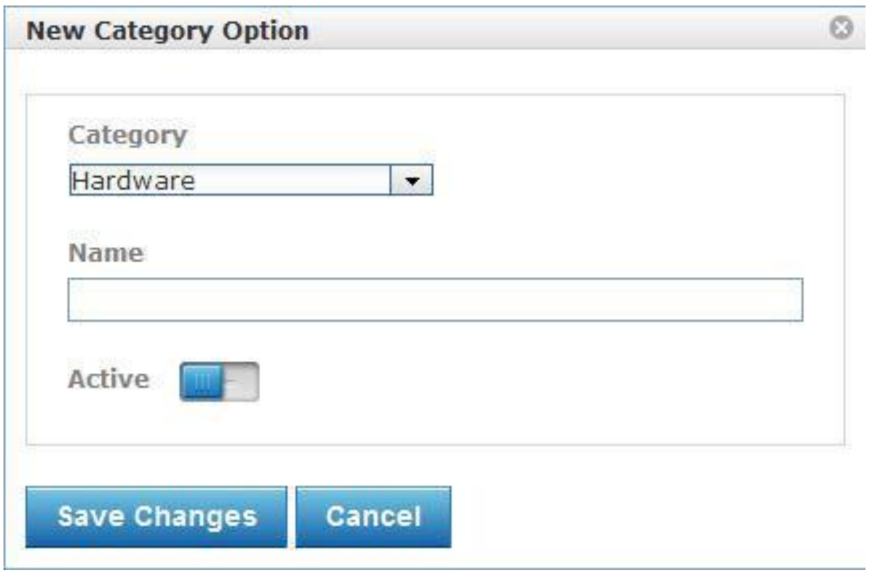
- Click on the category you want to delete in the **Category/Category Options** window.
- Next, click the delete icon next to the **Category/Category Options** window.
- A pop up will appear asking “Are you sure you want to delete this item?” Select **OK** to delete it or **Cancel** to return to the **Ticket Settings** window.
- After deleting the Category, it should no longer appear in the **Category Window**.

Add a Category Option

A category must have a category option in order to assign a technician to it.

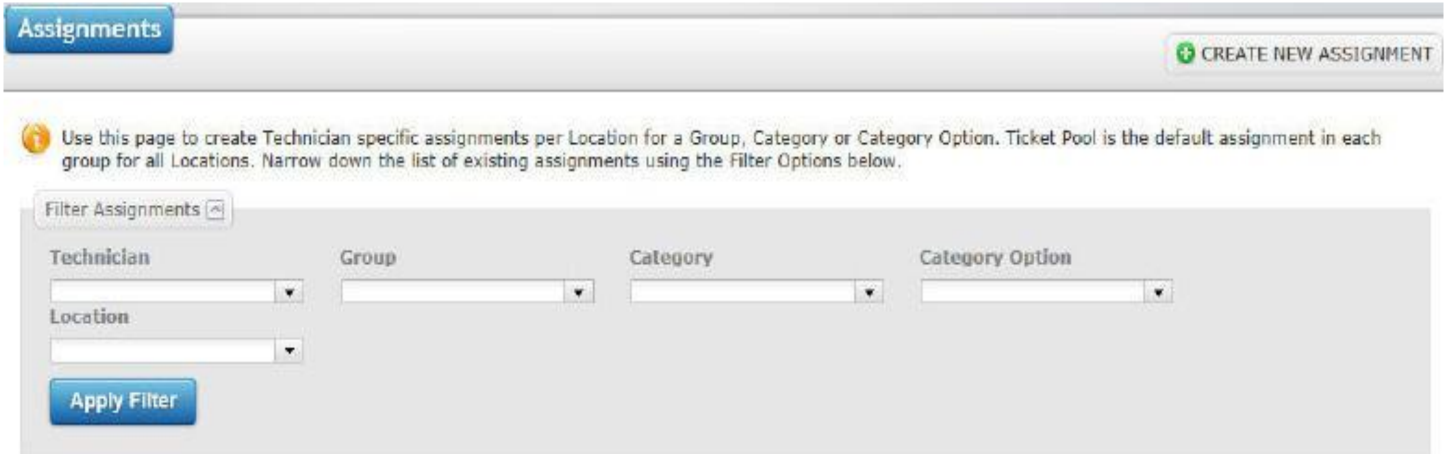
- Click on the Category you want to add a Category Option to.
- Click on **Add Category Option Icon** next to the **Category/Category Options** heading the following pop-up window will appear (***Figure 53***).

Figure 53



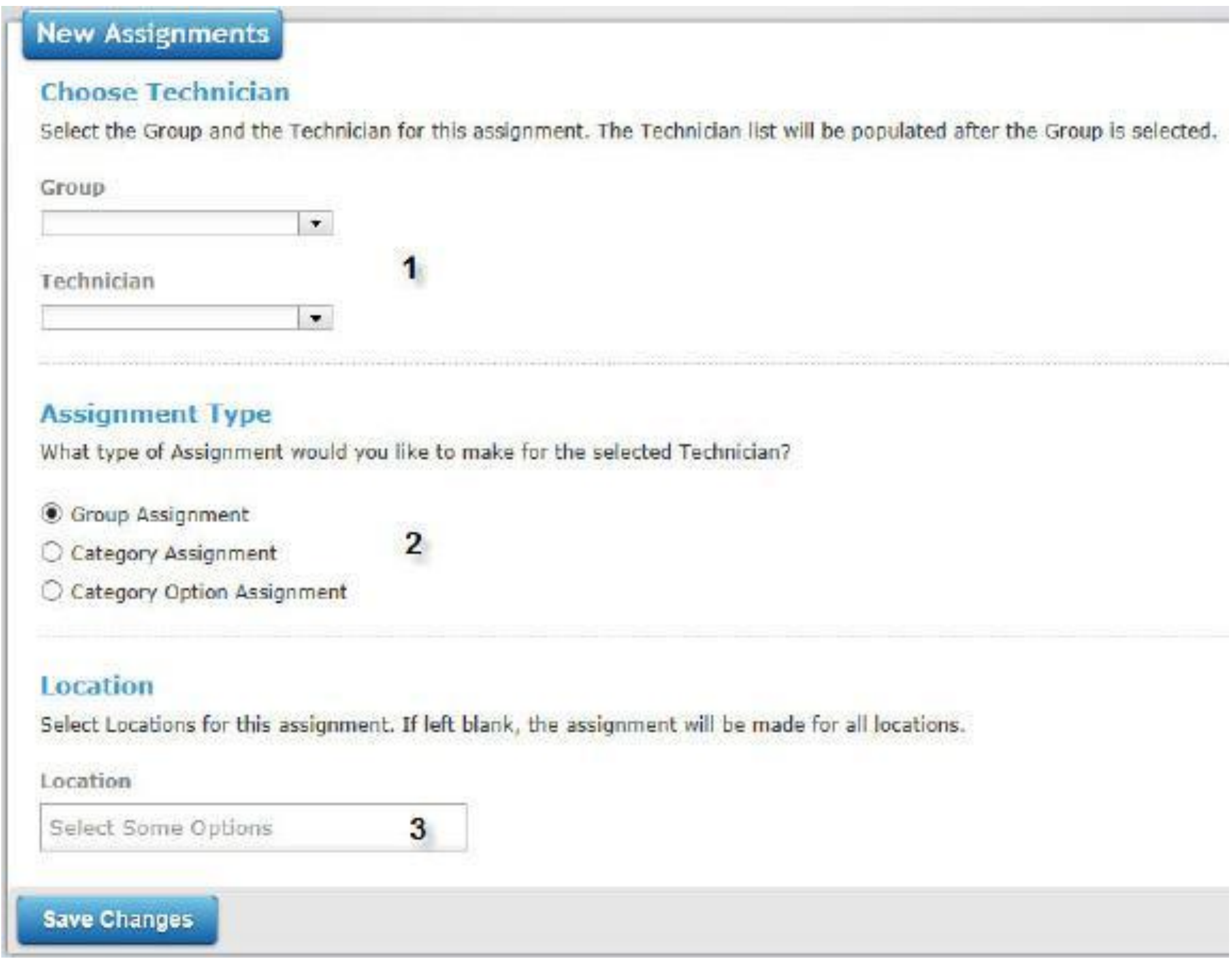
- Enter the name of the Category Option in the box provided and click **Save Changes** or click **Cancel** to return to the **Ticket Settings** window.
- If you wish to add the Category Option to a different Category than you originally selected, use the Category Dropdown list to select a new one.

Figure 54



Create an Assignment

Use this page to create Technician specific assignments. The Ticket Pool is the default assignment in each group for all Locations. Narrow down the list of existing assignments using the Filter Options of Technician, Group, Category, Category Option and Location. Click the down arrow on any field to make selection then click Apply Filter to view results.



Create an Assignment cont.

1. Choose a **Group** and a **Technician**. The Technician list will populate after the Group has been selected.
2. **Assignment Type**:
   Group Assignment - The selected Technician will appear as the Assignment for each ticket entered into the Group selected.
   Category Assignment - The selected Technician will appear as the Assignment for all Categories selected.
   Category Option Assignment - The selected Technician will appear as the Assignment for all Category Options selected.
3. **Location**: The selected Technician will appear as the Assignment for each Location selected. To select more than one, click in the empty space in the box, a drop down will appear and select.

Assignments can be made with any of the above options. The *helpdesk* will choose the most specific assignment when the ticket is entered.

Deleting Assignments

To delete an assignment, click the red X in the column on the right.

Add a New Technician

- If you would like to add a new user, click the **User Accounts** link. This will bring up a New User window. Fill in the information and click the **Save Changes** button. Using the edit user screen, you can add group roles to that user.
  - Note that the new user will not appear in the **User** drop-down box until you exit the **Add new technician** box and click the link again.
- In the **Role** drop-down box, select the appropriate role for that user.
- Click **Save Changes** or **Cancel** if you want to start over.
- The Users you added should now appear in the **Technicians** list for that group.

Edit an Existing Technician

- To edit a Technician's information, click User Accounts and then the edit icon at the end of the row for that technician.
  The edit user form pop-up window will appear (***Figure 55***).

- In this window, you can edit the Name, Email Address, Login ID or Password for the Technician.
- To make the Technician inactive, click the Active box, it will now be white.
- Phones, Addresses and Group Roles can also be added.
- **Edit** or **Delete** the Technician's Role(s) by selecting the edit or delete icons next to that Technician's list of Groups and respective Roles.
- The **Notification Assistant** icon will open the User Settings pop-up window when clicked. This window can be used to set assignments while the Technician is out of office. For more information about the Notification Assistant icon, see the **User Account** section of the Help Files.
- When you are done, click **Save Changes** to update the Technician's information. Then exit the pop-up window.

Delete a Technician

- To delete a technician, click the red X at the end of the row for that technician.
- A pop-up will appear asking "Are you sure you want to delete this item?" Select **OK** to delete it or **Cancel** to return to the **Ticket Settings** window.
- After deleting a technician, that technician will no longer appear in the **Technician** list pane.

Create a Custom Field for all Categories and Category Options in a Group

Locate the **Custom Field Setup** window:

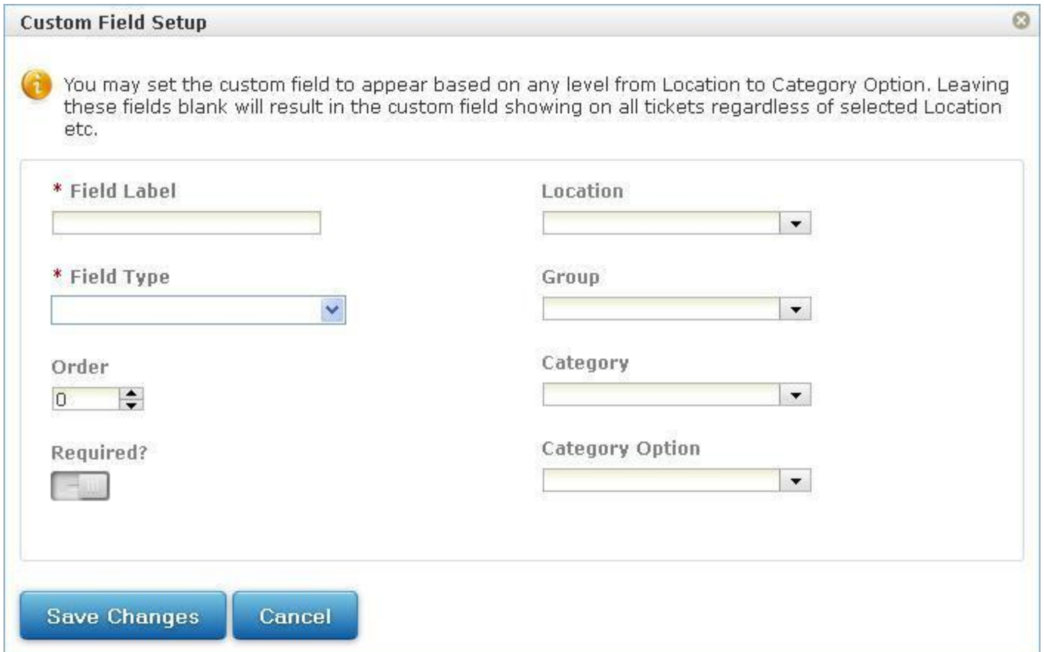
- Locate the Settings
- Click on **Ticket**
- Click on **Custom Field Setup**

A **Custom Field** can be set up for all Categories and Category Options within each Group, for a specific Category, or Category Option within a Group.

Custom Field Setup Box

- Click the **Add Custom Field** button to open a Custom Field Setup box (***Figure 56***). This box lists the Group, Category, and Category Options that the Custom Field is being created for.

Figure 56



- Enter the desired name into the **Field Label** text box. This will be the name that will appear next to the Custom Field on the **Create New Ticket** screen.
- Next select the **Field Type**. This can either be a text field, text area, radio button, check box, or drop-down, date field, or number text field.
- When a radio button or a drop-down is selected an option will appear titled **Custom Field Options**.
  - Type the name of the Custom Field Option in that box. If more than one option is necessary, click the green plus icon to add different options that a user can select for a radio button or a drop-down.
    - o An example would be that of a radio button. If someone has a computer problem that they are reporting, you can label a Field Type as Critical with two radio buttons, one for **Yes** and one for **No**.
- When a drop-down is being created, you can label the different types of options that a user will be able to select in the drop-down box.
- Once the Field Type and its Options are selected, there is an **Order** box. Type in the order that you want your particular Custom Field to appear in on the **Create New Ticket** screen. This option only applies if you have created more than one Custom Field for that Group's Category or
  Category Options. If there is only one Custom Field, simply type 0.
- To have the Custom Field be mandatory before a user's ticket can be submitted, click the **Required** checkbox. If this Custom Field is not necessary, leave this box unchecked.

- Once you have created your Custom Field, click the **Save Changes** button at the bottom of the **Custom Field Setup Box**. This will save the Custom Field you have created and close the Custom Field Setup Box.

- Once the **Custom Field Setup Box** has closed you will be taken back to **Custom Field Setup Window**. This window will refresh, listing all of the Custom Fields that have been created. Each Custom Field will show on a line with the Field Name, Field Type, Category or Category Option, if its required or not, and the order it will be displayed in.

Create a Custom Field for selected Categories and Category Options in a Group

- To create a Custom Field for a specific Category, click the drop-down arrow in the **All Categories** box. This will bring up a list of all the Categories for which a Custom Field can be created.
- Click on the desired Category to bring up another box on the right of the **All Categories** box titled **All Category Options**.

  - To create a Custom Field for all the Category Options under the selected Category, click on the **Create New Custom Field** button.
  - To create a Custom Field for a specific Category Option under the selected Category, click on the drop-down arrow in the **All Category Options** box. Clicking on this arrow brings up a list of all the Category Options, for which a Custom Field can be created. Click on the desired Category Option, then the **Create New Custom Field** button.

- The Custom Field Setup box will then appear. Follow the same steps as above to create the Custom Field(s).

Edit a Custom Field

- Click anywhere in the row of the Custom Field you would like to edit. Doing this will bring up the Custom Field Setup Window.
- Make any changes you would like and click the **Save Changes** button.

Delete a Custom Field

- Click the checkbox on the left side of the Custom Field you would like to delete.

  - Here, you can select multiple Custom Fields to delete them all at once.

- Once you have selected all the Custom Fields you would like to delete, click the red X 
- A window will pop up asking “Are you sure you want to delete the selected Custom Field(s)?” Click **Yes** to delete the Custom Field(s) or **Cancel** to exit the window without deleting the fields.

Customize a Status

Locate the **Customization** window:

- Log in under the Administrator account
- Click on **Ticket**
- Click on **Statuses**

Status Customization: This section allows you to add to, delete or change statuses. The default statuses are: **Assigned Not Updated**, **Awaiting Dispatch**, **Approved**, **Awaiting User Feedback**, **Work In Progress**, **On Hold**, **Resolved**, and **Closed**. Note that you have the option to change the Order in which the Statuses appear in the drop-down on the ticket. The lowest number will be the top of the list.

The Status Customization section is organized by:

- **Initial Status**: This is the default status for any ticket that is assigned to a technician or man-ager. Initial Status cannot be deleted.
- **Ticket Pool Initial Status**: This is the default status for all tickets assigned to the Ticket Pool. Ticket Pool Initial Status cannot be deleted.
- **Custom Status**: This is where you may add or delete statuses as needed.
- **Closed Status**: This is the status that will close the ticket. A closed ticket will not appear on the My Tickets screen unless the **Show Closed** is checked. Closed Status cannot be deleted.

Add a Status

- Enter the order and name you would like in the yellow text fields. To add the new status, click the Add Status button.

Edit a Status

- Click in any of the text fields of a completed status. You can type in a different **Order** or **Status** in these text fields. Click **Save** to save changes.

Delete a Status

- Click on the red X to the right of the Status you wish to delete. A window will appear asking if you are sure you want to delete that status. Click **OK** if you are sure. You cannot delete any status that is currently being used on a ticket.

Customize a Priority

Locate the **Priorities** window:

- Log in under the Administrator account
- Click on **Ticket**
- Click on **Priorities**

Priority Customization: The last section of the Customization window allows you to add, delete, or change priorities. The default Priorities are **Low**, **Medium**, and **High**.

- You have the option to change the **Order** in which the Priorities appear in the drop-down box on the ticket. The lowest number will be the top of the list. The lowest number is also the **Default Priority** for all tickets created.
- The **Icon** is how the priority is represented on the My Tickets screen. The text option will show the name of the priority.

Add a priority

- Click Add Priority, enter the name and color you would like in the text fields. Then click save. Your new priority will appear in the priority list above.

Edit a priority

- Click in any of the text fields of a completed priority. You can type in a different or new **Order**, **Priority**, and you can click the color drop-down box to select a new color. Click **Save** to save changes.

Delete a priority

- Click on the red X A window will appear asking if you are sure you want to delete that priority. Click **OK** if you are sure. Note that you cannot delete any priority that is currently being used on a ticket.

User Management

User Roles

There are different roles within *everything* HelpDesk which include End Users, Technicians, Managers, and a System Administrator. Each role has certain abilities and functions which are as follows.

End User

An End User has the ability to create and submit Tickets on critical issues. They are, however, limited on the information they can enter on each Ticket to the following:

- **Location**
- **Group**
- **Category**
- **Category Option**
- **Assignment+**
- Any **Custom Fields** that may be set up by the organization
- Ticket Description (**Subject**, **CC**, **BC**, **Note**, **Attachments**)

Note: End Users cannot select a Priority, Status, or Estimated Completion Date for Tickets they create. End Users also have the following capabilities within the application:

- View and edit Tickets they have created or are the Contact for
- Use the Ticket Search to view their Tickets in mass and create tabs for the My Tickets screen
- View Reports and Dashboards on the Tickets they have created or are the Contact for
- Launch public Ticket Templates that are filled out with all required information
- View public Knowledgebase articles on common issues

Technician

A Technician has the same abilities as an End User with more capability and rights. They have the following Ticket abilities:

- Create Tickets for themselves or on others' behalf
- Assign Tickets to themselves (or other Technicians in the Groups they are part of)
- View all Tickets for the Group they are assigned to
- Look up an individual End User and view Tickets created by or assigned to that User

Technicians can use the Ticket Search to:

- View, edit, and mass update Tickets they have created, or are the Contact for
- View, edit, and mass update Group Tickets
- Create Filters to use for My Ticket Tabs and Reports including scheduled automatic Reports

Technicians are also allowed to use the following features of *everything* HelpDesk:

- **Asset Tracker** (view, add, and edit assets in the *e*HD database)
- **Knowledgebase** (create, view, edit, and delete public and private articles for Groups they have access to)
- **Dashboards** (view own and group tickets in real-time performance)

- **Ticket Templates** (launch templates created by a Manager or the System Administrator)
- **PDA Access** (view and update Tickets from *e*HD support PDAs including the iPhone)

Member:

There are no default settings in the Permission Model for the Member Role. The Member Role is used to group Users together and then grant permission to all Users at once.

Manager

A Manager has all the rights a Technician does with added capabilities including the ability to see all group tickets for the group(s) they manage. They also have the following rights with the Ticket Settings portion of the application.

- Create, edit, and delete categories, assignments, Technicians, and custom fields for their Groups
- Create, edit, and delete scheduled tasks for their Groups

Managers are also allowed the following in *everything* HelpDesk.

- Create and view Dashboards for their Groups
- Create, launch, edit, copy, and delete Ticket Templates for their Groups

Administrator

The System Administrator has all the rights a Manager does with added capabilities including creating Tickets and Assignments. However, the Admin account does not have access to the My Tickets screen. Administrators can view their Tickets by searching for Tickets they have created or are the contact of in the Ticket Search.

Additional System Settings

Change your Base URL

Locate the **General** settings window:

- Log in under the Administrator account
- Click on **Settings**
- Click on **General** (***Figure 57***)
- The Base URL that you enter is the location that people will type into the browser address bar to access the helpdesk (e.g., http://localhost:8081/ehelpdesk) You can change the Base URL if your server IP address or DNS name changes. The Base URL is also the address for the view ticket link in emails sent from the application the default URL for *e*HD is http//www.grouplink.net
- To configure your **Max Upload Size** in MB, use the field provided on this page.

  • Note that the size must correspond with the max packet limit of your database.

- Once you have entered your new Base URL and chosen your maximum upload size, click **Save Changes**.

Figure 57

System Message Text

- Enter a message you would like displayed to users using eHelpDesk.
- Click on the Save Changes button when finished.

Session Timeout Length

- Click in the text box to enter the timeout length. Remember, the timeout length is measured in minutes. The application has the timeout feature for security purposes. A warning box will ap pear 5 minutes before the timeout length is up.

***Note: You must enter a positive value for the Session Timeout Length. DO NOT enter a zero.

Set up a New Database on your Server

Locate the **Database Connection** window:

- Log in under the Administrator account
- Click on **Settings**
- Click on **Database Connection** (***Figure 58***)

From the Database Connection, you will be able to set up the database on the server that you'll be connecting to.

1. **Driver**: Select the type of database you are using from this drop-down box.
2. **Server Name**: Enter the IP address or DNS name of the server hosting the database. (This will be "localhost" if you are running the database locally.)
3. **Change Password**: Enter a password that helpdesk will use to connect to the helpdesk data-base.
4. Click **Save Changes** to save changes. Remember to restart the application and **Tomcat** for database changes to take effect.

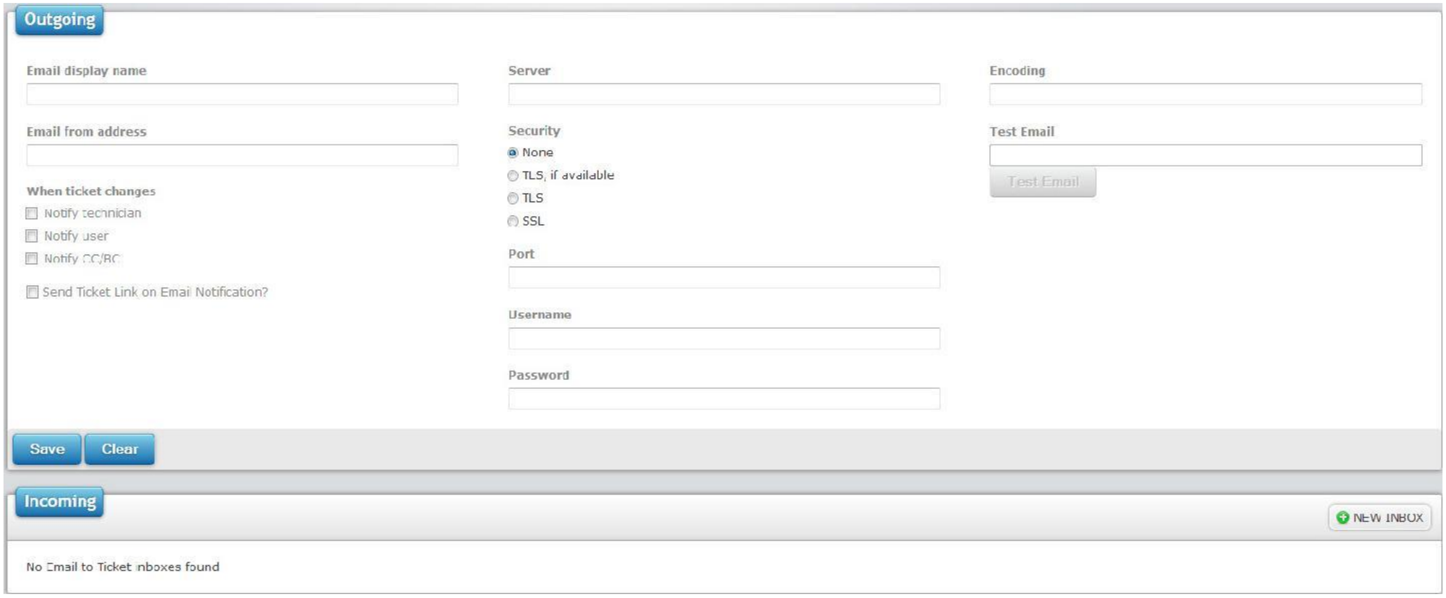
Figure 58

Set up Outgoing Mail

Locate the **Mail** window:

- Log in under the Administrator account
- Click on **Settings**
- Click on **Mail** (***Figure 59***)

Figure 59



Outgoing: This section sets up all emails sent from *everything* HelpDesk®. Each field in the Outgoing section of Mail must be filled in with the appropriate information, as defined below:

- **Email display name**: The name entered here acts as the name of the email account. For example, “Matt” for the address mattjensen@grouplink.net.
- **Email from address**: Enter the address that will be used to send all emails.
- **When Ticket changes:** Checking this box will make the check box on each ticket checked. Leaving this check box blank will leave the check box on the ticket blank, leaving the notifications up to the technician or user.

  Notify technician
  Notify user
  Notify CC/BC - By checking this box, any address that is entered in the CC/BC field on the ticket will be notified with each comment or update.

  Send Ticket Link on Email Notification? Checking this box determines whether or not a link to the ticket will be sent in the email notifying the technician or the user. Checking this box means the link is included in the email and will allow the Ticket to be opened from the email by clicking the link. If you are not logged into the application, clicking the link will lead you to the HelpDesk login screen. After entering your Username and Password, the Ticket window will ap-pear.

  Leaving this check box blank means the link will not be included in the emails.

- **Server**: Enter the name of your mail server.
- **Security**: The system will support different types of cryptographic protocols. When configuring your SMTP connection on your outgoing SMTP server, you have the ability to choose from the following security options:

- **None**
- **TLS, if available**
- **TLS**
- **SSL**

- **Port**: When the **TLS, if available** or the **TLS** radio button is selected the port will default to 587. If the **SSL** radio button is selected then the port will default to 465; however, this is customizable to fit your needs.
- **Username**: Some mail servers require a username. If your mail server requires a Username, enter it here.
- **Password**: If your mail server requires a username it will, most likely, require a password. Enter it here.
- **Encoding**: This is mainly for using different languages. Enter the same encoding that you are using on your mail server. An example of encoding is UTF-8.

After entering the necessary information, click the **Save** button.

- **Test Email**: Enter in a valid email address and then click the **Test Email** button. An email will be sent to that account, confirming that the system is working.

Setup the Email to Ticket Feature

Locate the **Mail** window:

- Log in under the Administrator account
- Click on **Settings**
- Click on **Mail**

Incoming: This section is to set up an inbox that will turn the emails sent into tickets. This is known as our **Email to Ticket** feature.

Set up new Inbox: Clicking on this link will open a window for the Email to Ticket Configuration. Required fields are marked with an *. To setup the Email to Ticket feature, fill in each of the fields, which are explained below:

- **Server**: Enter your Server IP address.
- **Server Type**: Pick whether you are using IMAP or POP
- **IMAP Folder**: If using IMAP, enter the name of the folder. If you are using POP, this field will not appear.
- **Security**: The system will support different types of cryptographic protocols. When configuring your incoming Mail server, you have the ability to choose from the following security options:

  - **None**
  - **TLS, if available**
  - **TLS**
  - **SSL**

- **Port**: When the **TLS, if available** or the **TLS** radio button is selected the default port for IMAP will be 143 and the default port for POP will be 110. If the **SSL** radio button is selected then the default port for IMAP will be 993 and the default port for POP will be 995. However, the ports are customizable to fit your needs.

- **Username**: Enter the Username for the email account you are using.
- **Password**: Enter the Password for the Username chosen above.
- **Re-Type Password**: Just to make sure we have the right information, enter the password one more time. You cannot continue if the passwords do not match.
- **Emails from non-users**: You can now select how the application handles emails from anonymous email accounts. Choose whether you want to **Reject Mail**, use an **Anonymous Account**, or **Create** an **Account** from the new user's email address.
- **Reply Name**: Just like the email display name from the Outgoing section, the name entered here acts as the name of the email account. For example, "Matt", for the address mattjensen@grouplink.net Note: This is not a required field.
- **Reply Address**: The address entered here has two functions. First, it is the email address of the inbox where the emails that are to be tickets are sent. Second, any emails that come from the *everything* HelpDesk® system, in regards to the tickets created by this feature, will use this address. It is possible to update an existing ticket, one already created by this feature, by replying to the email, as long as you keep the subject line the same. When you are using the Email to Ticket feature, this reply address takes the place of the **Outgoing** reply address for the group picked below.
- **Location**: The ticket created will be assigned to this location
- **Group**: The ticket created will be assigned to this group.
- **Priority**: The ticket created will be assigned this priority.
- **Locale**: Gives you the option of choosing the language for the email to ticket feature.
- **Send default mail notification**: Here, you can choose whether or not the person who sent the email/created the Ticket will receive an email notification of the Ticket creation. If you do not wish to have the person notified, leave the box unchecked. If you wish to have the person notified with the Ticket Number, check this box.
- After filling in the necessary information, click the **Test** button. You will receive a message in your email inbox informing you that everything worked. Click the **Save** button when you are finished, or click **Cancel** to start over.

You will see a circular icon next to your inbox, letting you know that the Email to Ticket feature is running for this inbox.

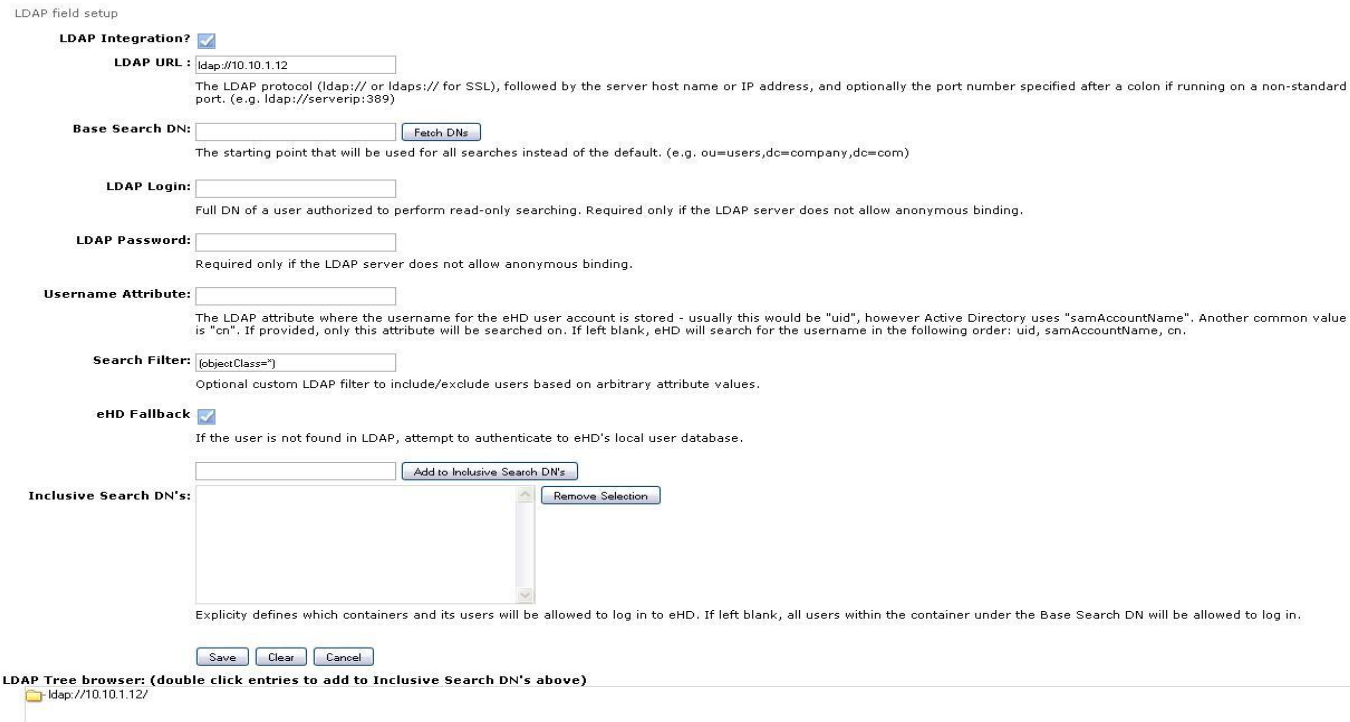
Note: Once the email to ticket feature is running, emails that have been turned into tickets will be deleted from your inbox.

Integrate with LDAP

Note: Before you proceed with your LDAP import, we recommend you make a backup of your database.

- Log in under the Administrator account
- From side menu, select **Settings** and click on the **LDAP** link (***Figure 60***)

Figure 60



- Clicking the link will open the LDAP configuration page which contains two sections:

  - Above is LDAP integration fields that need to be filled out completely for the integration
  - Below is the LDAP browser window

- Begin integration by checking the LDAP Integration checkbox as demonstrated above

  - Unchecking the checkbox will prevent LDAP integration, leaving only the *e*HD database to authenticate users

- Enter the LDAP URL: ldap:// (<IP address or DNS name> of your LDAP server)

  - If you are running a secure LDAP, you need to run and install an SSL certificate. See our Knowledgebase article at http://support.grouplink.net/ehelpdesk/kb/kbView.glml?kbId=71 or contact Grouplink Support (support@grouplink.net).
  - Once you have setup the SSL certificate, enter the LDAP URL ldaps://<IP address or DNS Name> of your LDAP server.

- In a large LDAP Tree, a Base Search DN can be defined to determine where *e*HD begins searching for users. Note that any users above this base search level will be excluded from *e*HD's LDAP search.
- If you are using Novell's eDirectory, a Base Search DN is not required. If integrating with Micro-soft Active Directory, you must enter a Base Search DN.

    - The first way to enter this information is to enter it manually using a Distinguished Name format.
    - The second way is to click on the Fetch DNs button 

      to pull up a selection list of your available DN. Double-click on the preferred DN and it will be populated in the Base
      Search DN field.

- The LDAP Login field can be left blank if your LDAP allows for anonymous bind requests; otherwise, enter the fully distinguished name of the administrator or any other user that has full read-only privileges to your entire tree.
- Next, enter the user's LDAP password
- The Username Attribute field is where you will enter the LDAP attribute where the username for the *e*HD user account is stored. Usually this would be "uid", however, Active Directory uses "sa-mAccountName". Another common value is "cn". If provided, only this attribute will be searched. If left blank, *e*HD will search for the username in the following order: uid, samAccountName, cn.
- Click the Save button at the bottom of the LDAP Integration section - this will connect *e*HD to your LDAP tree and display it in the LDAP Tree browser located at the bottom of the window.
- The Search Filter field is an optional field where LDAP results can be filtered for a specific type of object or data subset. This is advantageous if you have an especially large LDAP tree.

    - For example, to filter LDAP search results to only return User objects, enter: objectClass=user

- If the eHD Fallback checkbox is checked, everything HelpDesk will attempt to authenticate to eHD's local user database in the case that a user is not found in LDAP.
- The Inclusive Search DN's field lets you define which container and it can log into the help desk. If left blank, all users within the container under the Basic Search DN will be allowed to log in. There are two ways to enter this information:

    - You may enter the distinguished name (DN) in the text field above the Inclusive Search DN's window and click the Add to Inclusive Search DN's button
    - The second way is to find the DN in the LDAP tree below and double-click its name to add it over to the Inclusive Search DN's window
    - Note that only the DNs and the users they contain will be able to log into the help desk
    - Leaving the Inclusive Search DNs blank will ensure that everyone in your LDAP tree will be able to log into the help desk

- If you would like to remove an DN from the Inclusive Search DN's field, highlight it and click the Remove Selection button.

LDAP Field Setup

- In the LDAP field setup window, you can decide which LDAP attributes you would like to have displayed on the Ticket, in the User's Account page, or both
- Click on the LDAP field setup link at the top of the LDAP configuration page - this will bring up the LDAP field setup window

- Enter the fully distinguished name of the administrator or user that has access to all LDAP fields you wish to display from LDAP (minus the LDAP Base search if you have one defined) and click the Submit button
- Clicking the Submit button will generate a list of available LDAP attributes for the selected user in the bottom window.

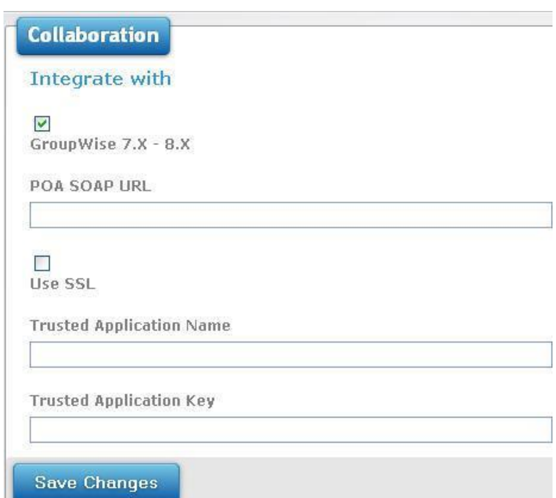
  • You can add the attributes to the LDAP field list by clicking the green plus sign 
  • Enter a Display name for the LDAP attribute that will be used as the field label on the ticket and User Account page
  • If you wish to display these fields on Tickets under the Contact Information section, click the Show Field on Ticket checkbox next to the desired field; if not, the added LDAP attribute will only be displayed on the User's account page
  • To remove an attribute from the Ticket and/or the User Account page, click the red X  at the end of that attribute's row

- When you are finished selecting attributes, exit out of the LDAP field setup window by clicking the X in the upper right-hand corner

Integrate with GroupWise

- Log in under the Administrator account
- Click on **Settings**
- Click on **Collaboration** (***Figure 61***)

Figure 61



  • You can integrate with GroupWise by creating a trusted application, by using a SOAP port to connect to the GroupWise server, or by using Active X controls.

o Creating a trusted application is compatible with GroupWise version 6.X, 7.X, or 8.X o Using the SOAP port to connect with the GroupWise server is also compatible with

GroupWise version 6.X, 7.X, or 8.X. Note that this option is only available on Linux and Windows. You must also make sure that SOAP is enabled on your GroupWise server. The POA SOAP URL should be in the following format: 10.10.22.156:7191. After entering the SOAP information, all users who wish to integrate with GroupWise need to log in to their account and click on their name in the top left corner. They must type in their Group Wise login ID and password, and then click **Save Changes**. This will allow integration to occur.

o Once the Collaboration is set up, edit the Group that would like to utilize the feature. Click the box to Enable GroupWise Integration. Save Changes.

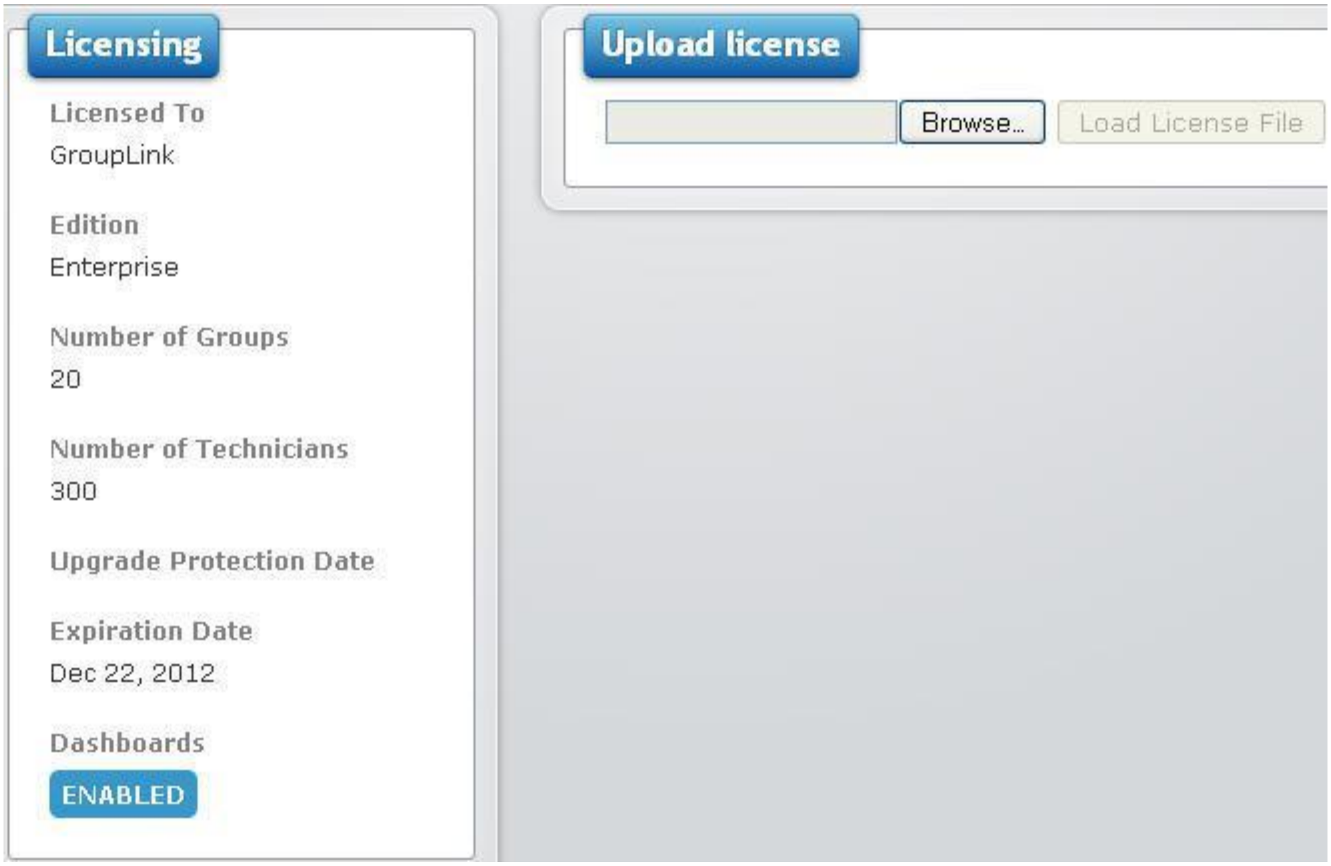
- Once integration has been established the **Add Comment Button** on a created ticket will have multiple options such as **Schedule a Task** or **Schedule an Appointment**. Clicking on these options opens up a page that allows you to create appointments and tasks that will be posted on your GroupWise calendar. You can also perform a busy search from the integration interface for scheduling a task and scheduling an appointment.

  - Note that once the integration with GroupWise has been established, it will connect and dis connect on demand when you create an appointment or task. It will not remain connected the entire time you are logged into the Help Desk.

Reload your License Agreement

Locate the **Licensing** window:

- Log in under the Administrator account
- Click on **Settings**
- Click on **Licensing** (***Figure 62***)



The Licensing screen contains your license agreement and information.

- If you need to reload the license file, click the **Browse** button. Your Windows, Linux or Mac OSX will prompt you to locate your license file on the computer.
- Select the license file (this will be a **.zlx** file) and click **Open**.
- Next, click **Load License File** to update your license.

Upgrade to the Latest Version of *e*HD

Be sure to know the location of your license file when upgrading *everything* HelpDesk.

The latest version of *e*HD can be downloaded at http://downloads.grouplink.net. If you are upgrading from 9.1 or newer and initially used the all-inclusive installer, your settings from your previous installation will be remembered. Simply hit next at the Custom or Express installation. To upgrade your existing installation (9.X to 11.X), we recommend you remove your existing version as well as Tomcat and use the eHD Installer which comes bundled with its own customized version of Apache Tomcat. This will NOT affect your data as all the data is stored in the database. If you are reinstalling fresh on a new server, we also recommend you use the bundled version of MySQL as your database.

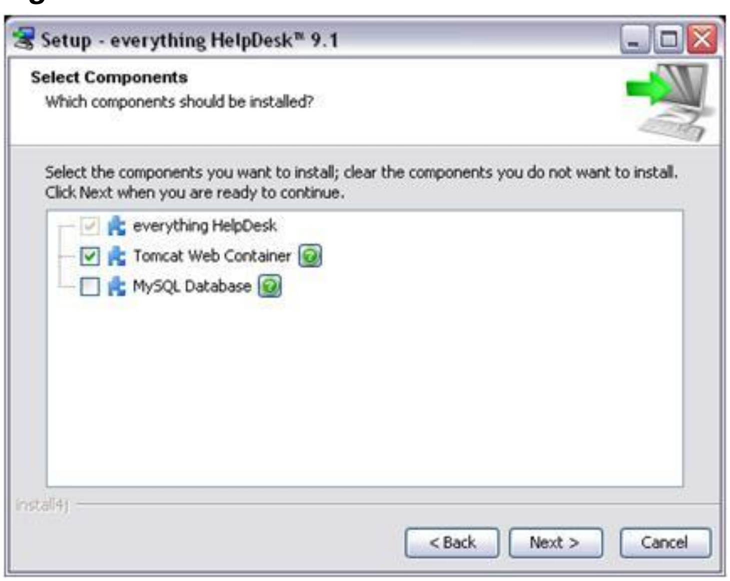
After you have removed your existing installation, run the appropriate installer for your platform (Linux/Windows 32/64 bit).

Continue through the installer until you are presented with the Select Installation Type screen. If you have an existing database, select the **Custom Installation** radio button. Otherwise, select the **Ex-press** Installation radio button and click **Next**.

Custom Installation

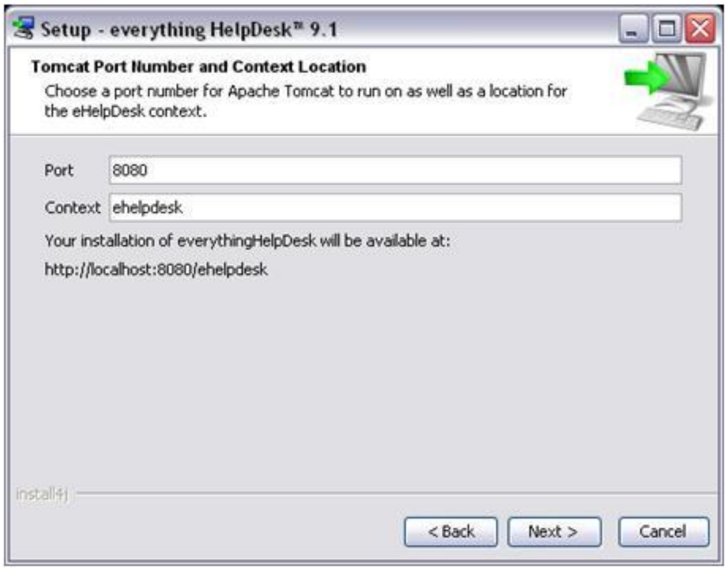
In a custom installation, you will be asked which components to install (***Figure 63***). Choose **everything HelpDesk** (automatically chosen for you) and **Tomcat Web Container**.

Figure 63



You will be asked to select the folder where you would like *e*HD installed. The next screen will present you with Tomcat's Port Number and Context Location configuration screen (***Figure 64***).

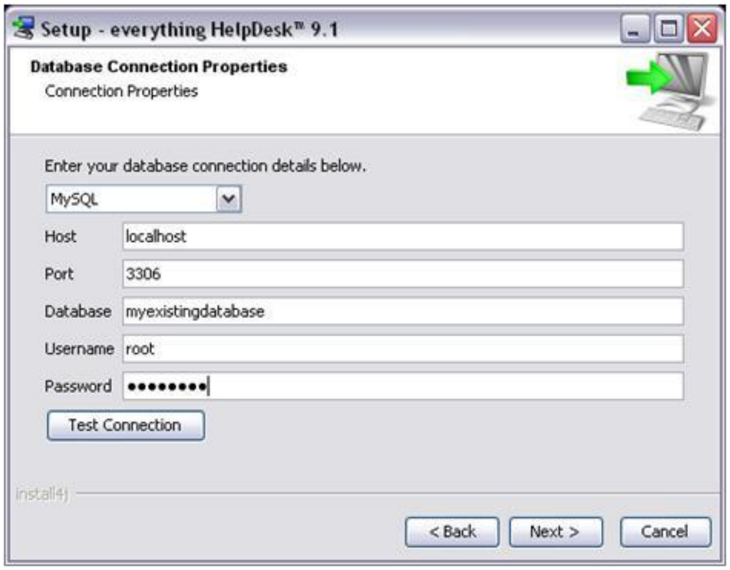
Figure 64



Note: In Linux, ports lower than 1024 are Privileged ports and will require the application to be executed as "root" to run. Also, pointing a browser to the base context will automatically redirect to the *e*HD context.

For an existing database custom upgrade, you will be asked to provide your database connection in-formation (***Figure 65***). You must press the **Test Connection** button and successfully connect to your database before you can proceed with the installation.

Figure 65



Once installation is completed, the *e*HD Tomcat service will automatically start. You can the open a web and navigate to *everything* HelpDesk. **You will need to log in as ADMIN and upload your license file before you can start using the application**.

For more detailed information, see Knowledgebase Article #52 on GroupLink's support site.

iOS/Android App

everything HelpDesk App can be downloaded and installed from the app store. This feature was added for the benefit of Technicians and Managers who are constantly away from their computer.

Once the app is downloaded and installed, edit the settings. Enter the URL of your helpdesk followed by **/api/.** Below is an example:

http://support.companyname.com/api/

Sorting Tickets

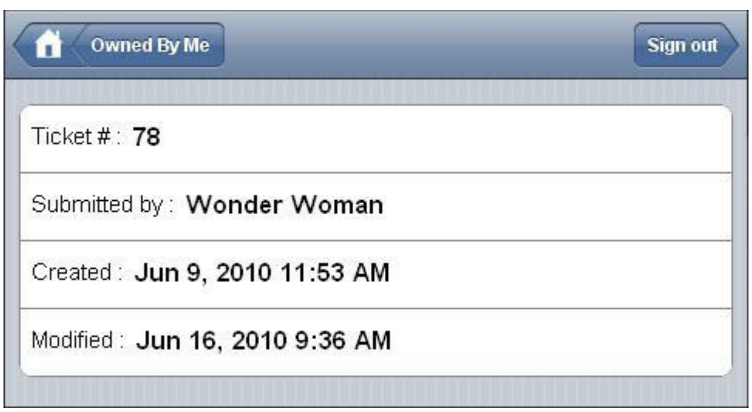
At the very top you can choose to sort the tickets by

- **Priority**
- **Id**
- **Contact**
- **Created Date**
- **Modified Date**
- **Location**

Accessing Tickets

To view an individual Ticket, simply touch the ticket you would like to view. The ticket will be pulled up (***Figure 70***) and can be viewed by scrolling through the different sections.

Figure 70



- The top section lists the Ticket #, who submitted the ticket, the created date and when it was last modified.
- The Contact Information section lists the name and contact information for the user who is the contact for the ticket. Directly from this section, you have the ability to send an email to or call the contact for the ticket.
- The Ticket Info section lists, in order,

  - **Priority**
  - **Status**
  - **Est. Compl. Date**
  - **Location**
  - **Group**
  - **Category**
  - **Category Option**
  - **Assignment**
  - **Any Custom Fields**
  - **Subject**: To scroll through an entire Subject, touch the Subject to enter edit mode, touch and hold in the text box until the magnifying bubble appears and move your finger slowly to the right or left.
  - **Note**: To scroll through an entire Note, use two fingers and drag the note upward to view the lower end.

Below this information is the Save Changes button. When you have made any desired changes to the ticket, press this button and the changes will be saved.

The History Comments button is at the bottom of the page. To view the History Comments, press the button and you will be directed to a separate page for the History Comments. From this page, press the Add comment button to pull up a list of the following History Comment template options:

- **Add comment**: This option will pull up a new blank History Comment which you can fill out, choose to notify the Technician and/or user, and save.
- **Received a phone call**: This will automatically fill the Subject line with the Date and Time and show that a phone call was received about the Ticket.
- **Placed a phone call**: When a phone call is placed about the Ticket, this option will automatically fill the Subject of the History Comment with the date and time the phone call was placed.
- **Schedule an appointment**: This selection will open an appointment for the contact of the ticket.

  - Add people in your organization to the appointment as well as CC or BC anyone in the organization.
  - Enter the Place where the appointment will be held.
  - Select a Start Date from the scrolling calendar that pulls up with this option.
  - Select the Start Time for the appointment.
  - Select the Duration for however long you need the appointment to last.
  - Mark the calendars of the people involved with the appointment as Free, Tentative, Busy, or Out of Office.
  - Add a Subject and/or Note as desired.
  - You can choose whether or not to notify the Technician and/or User of the Ticket.

When you have filled out the information, press the Save Changes button to post the appointment.

- **Schedule a task**: This screen is similar to the screen of the Schedule an Appointment option. Fill out the fields in the screen and push the Save Changes button at the bottom to post the task.
- **Cancel**: Selecting the Cancel button will cancel the Add History Comment action.

Create a New Ticket

To create a new Ticket using the iPhone or Android, press the Create New Ticket icon  next to the home icon in the top left corner of the screen. The new Ticket will display on the screen with the following information:

- **Ticket #**: It will be listed as New Ticket.
- **Submitted by**: The information here will belong to the logged in user.
- **Created**: This will list the created date.
- **Modified**: Because this is a new ticket, the Modified date will be the same as the Created date.
- **Contact Information**: The Contact Information listed in this section will belong to the logged in user. This can be changed by touching the down arrow at the end of the row and selecting a new Contact from the list.
- **Ticket Info**:

  - **Priority**: To change the Priority of the Ticket, touch the down arrow at the end of the Priority row and select a new Priority.
  - **Status**: To change the Status of the Ticket, touch the down arrow at the end of the Status row and select a new Status.
  - **Est. Compl. Date**: This field will auto-fill with the current date. To change the date, touch the over arrow at the end of the row and a scrolling calendar will appear. Select the desired Year, Month, and Day and touch the Done button.
  - **Location**: Touch the down arrow at the end of the row, select your Location from the list that appears, and touch the Done button.
  - **Group**: Select the Group that is relevant to your Ticket and touch the Done button.
  - **Category**: Select the Category that is relevant to your Ticket and touch the Done button.
  - **Category Option**: Select the Category Option that is relevant to your Ticket and touch the Done button.
  - **Assignment**: Select the Assignment that is relevant to your Ticket and touch the Done but-ton.
  - **Custom Fields**: Fill in any other Custom Fields set by your organization and touch the Done button.
  - **Subject**: Enter a Subject as you would in a Ticket on your computer and touch the Done button.
  - **Note**: Enter a Note as you would in a Ticket on your computer and touch the Done button.

Once all of this information is filled out, touch the Save Changes button. A Save successful message will appear at the top of the screen.

Sign Out

To sign out of the application, press the **Sign Out** button 

in the top right corner of the screen.