



One Identity Manager 9.1.2

Help Desk Module User Guide

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 **WARNING: A WARNING icon highlights a potential risk of bodily injury or property damage, for which industry-standard safety precautions are advised. This icon is often associated with electrical hazards related to hardware.**

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One Identity Manager Help Desk Module User Guide  
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For the most recent documents and product information, see [Online product documentation](#).

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## Help desk

The integrated help desk functionality in One Identity Manager encompasses logging a problem, linking the data and information with employees, devices, and workdesks as well as chronological tracking of the steps and measures taken to work out a solution to the problem. Problems can be forwarded for processing or deferred for resubmitting.

**NOTE:** Prerequisite for the using help desk functionality in One Identity Manager is the installation of the Helpdesk Module. For more information about installing, see the *One Identity Manager Installation Guide*.

One Identity Manager components for report subscription are available when the **Helpdesk** configuration parameter is set.

- In the Designer, check if the configuration parameter is set. Otherwise, set the configuration parameter and compile the database.

If you disable the configuration parameter at a later date, model components and scripts that are not longer required, are disabled. SQL procedures and triggers are still carried out. For more information about the behavior of preprocessor relevant configuration parameters and conditional compiling, see the *One Identity Manager Configuration Guide*.

### Detailed information about this topic

- [Basic data for logging and processing calls](#) on page 5
- [Support staff and teams](#) on page 18
- [Handling calls](#) on page 21
- [Configuration parameters for the Helpdesk Module](#) on page 33

## Basic data for logging and processing calls


Enter basic data for reporting and processing a call in the One Identity Manager.

- Support staff and teams  
For more information, see [Support staff and teams](#) on page 18.
- Type of incoming call  
Define the different possible types of incoming calls, such as telephone, fax, email, post. For more information, see [Incoming calls](#) on page 7.
- Call statuses  
Log the possible call statuses to describe each processing stage of a call. For more information, see [Call status](#) on page 7.
- Call types  
Enter call types if you required further categorization. For more information, see [Call types](#) on page 9.
- Prioritizing  
Enter priorities for calls if you want to grade them in order of importance. For more information, see [Call priorities](#) on page 8.
- Severity codes  
Define severity codes for call in order to grade the level of disturbance to work through an error. For more information, see [Severity codes](#) on page 10.
- Escalation levels  
Enter escalation levels to define handling procedures for incoming calls. For more information, see [Escalation levels](#) on page 11.
- Escalation procedures  
The escalation level helps to define which action should be started for which call event. For more information, see [Escalation procedures](#) on page 12.
- Products  
Calls taken by default in the One Identity Manager are about devices and workdesks. You can define additional products for which calls can be logged. For more information, see [Products](#) on page 16.
- Service agreements  
Service agreements can be used to automatically determine reaction times and solution times for calls. For more information, see [Service agreements](#) on page 13.

# Incoming calls

Enter the different possible methods used to make calls, such as telephone, fax, email, post.

## To create or edit a call method type

1. In the Manager, select the **Help desk > Basic configuration data > Call method types** category.
2. In the result list, select the call method type and run the **Change main data** task.  
- OR -  
Click  in the result list.
3. Edit the main data.

**Table 1: Main data for call method types**


Property	Meaning
Call came in by	Type of incoming call. The call types <b>Telephone call</b> , <b>Fax</b> , <b>Email</b> , <b>Answerphone</b> , <b>SMS</b> , and <b>Letter</b> are predefined.
Description	Text field for additional explanation.
Disabled	Specifies whether the call method type is in use.

4. Save the changes.

# Call status

Log the possible call statuses to describe each processing stage of a call.

## To create or edit a call status

1. In the Manager, select the **Help desk > Basic configuration data > Call status** category.
2. In the result list, select the call status and run the **Change main data** task.  
- OR -  
Click  in the result list.

3. Edit the main data.

**Table 2: Call status main data**


<b>Property</b>	<b>Meaning</b>
Call status	Type of call status The call statuses <b>Investigating</b> , <b>Open</b> , <b>Closed</b> , <b>Customer closed</b> , and <b>Customer response requested</b> are predefined.
Display value	Display value for the call status.
Description	Text field for additional explanation.
Disabled	Specifies whether the call status is in use.
Closed	Calls with this status can no longer be processed.
Placed on hold	This status temporarily stops a call from being processed.

4. Save the changes.

## Call priorities

Enter priorities for calls if you want to grade them in order of importance.

### ***To create or edit a call priority***

1. In the Manager, select the **Help Desk > Basic configuration data > Priorities** category.
2. In the result list, select the call priority and run the **Change main data** task.  
- OR -  
Click  in the result list.



3. Edit the main data.

**Table 3: Call priorities main data**


<b>Property</b>	<b>Meaning</b>
Priority	Name of the call priority. The following priorities are predefined: <ul style="list-style-type: none"><li>• <b>000</b>: not applicable (other)</li><li>• <b>001</b>: Limited importance</li><li>• <b>002</b>: Minor</li><li>• <b>003</b>: Major</li><li>• <b>004</b>: Very important</li><li>• <b>005</b>: Extremely important</li></ul>
Description	Text field for additional explanation.
Disabled	Specifies whether the call priority is in use.

4. Save the changes.

## Call types

Enter call types if you require further categorization.

### **To create or edit a call type**

1. In the Manager, select the **Help desk > Basic configuration data > Call types** category.
2. In the result list, select the call type and run the **Change main data** task.  
- OR -  
Click  in the result list.

3. Edit the main data.

**Table 4: Call type main data**

<b>Property</b>	<b>Meaning</b>
Call type	Type of call such as, device error, software error or operator error.
Parent call type	By specifying a parent call type, you build a hierarchical structure.
Product	To capture possible error types for a product, assign a product to the call type.
Description	Text field for additional explanation.
Disabled	Specifies whether the call type is in use.

4. Save the changes.


### Related topics

- [Assigning call types to products](#) on page 17

## Severity codes

Define severity for call in order to grade the level of disturbance to work through an error.

### ***To create or edit a severity code***

1. In the Manager, select the **Help Desk > Basic configuration data > Severity** category.
2. In the result list, select the severity and run the **Change main data** task.  
- OR -  
Click  in the result list.

3. Edit the main data.

**Table 5: Main data for a severity code**


Property	Meaning
Severity code	Name of the severity code. The following severity levels are predefined: <ul style="list-style-type: none"> <li>• <b>000, 001, 002</b></li> <li>• <b>Level 1:</b> Critical business impact</li> <li>• <b>Level 2:</b> Significant business impact</li> <li>• <b>Level 3:</b> Minimal business impact</li> <li>• <b>Level 2:</b> Nominal business impact</li> </ul>
Description	Text field for additional explanation.
Disabled	Specifies whether the severity code is used.

4. Save the changes.

## Escalation levels

Enter escalation levels to define handling procedures for incoming calls.

### *To edit or create an escalation level*

1. In the Manager, select the **Help desk > Basic configuration data > Escalation levels** category.
2. In the result list, select the escalation level and run the **Change main data** task.  
- OR -  
Click  in the result list.
3. Edit the escalation level's main data.

**Table 6: Main data for escalation levels**

Property	Meaning
Escalation level	Name of the escalation level.
Description	Text field for additional explanation.
Disabled	Specifies whether the escalation level is in use.


4. Save the changes.

# Escalation procedures

The escalation level helps to define which action should be started for which call event. Actions such as, for example:

- Running CMDs or VB.Net statements
- Running SQL procedures
- Sending emails
- Entering files or logs

## **To edit or create an escalation procedure**

1. In the Manager, select the **Help desk > Basic configuration data > Escalation procedures** category.
2. In the result list, select the escalation procedure and run the **Change main data** task.  
- OR -  
Click  in the result list.
3. Edit the escalation procedure's main data.

**Table 7: Main data for escalation procedures**

<b>Property</b>	<b>Meaning</b>
Escalation procedure	Name of the escalation procedure.
Calls that meet the condition	Condition that triggers the escalation level. The condition has to be entered in SQL syntax for which a wizard is available.
Event to be triggered	The menu offers all events that you defined in the Process Editor in the Designer for the TroubleTicket base object.

4. Save the changes.

### **Example: Escalation procedure**


If the condition specified for a call is `Severity is 2 and priority is 2`, the escalation procedure `Check(Severity, Priority)` is triggered. A schedule checks regularly whether a call has fulfilled the defined condition. If this is the case, the escalation procedure triggers the `CallPrio2` event. This causes an email to be sent to the person dealing with the call.

Escalation procedure	Check(severity, priority)
Calls that meet the condition	ID_TroubleSeverity = '2' and ID_TroublePriority = '2'
Event to be triggered	CallPrio2

## Service agreements

A service agreement link is integrated into the help desk function that can be attached to departments, cost centers, locations, business roles, devices, and products. This allows call reaction and solution times to be determined automatically and escalation procedures that are connected to the service agreement to be triggered.

### To create or edit a service agreements

1. In the Manager, select the **Help Desk > Basic configuration data > Service agreements** category.
2. In the result list, select the service agreement and run the **Change main data** task.  
- OR -  
Click  in the result list.
3. Edit the main data.

**Table 8: Main data for service agreements**

Property	Meaning
Service agreement	Name of the service agreement.
Manager or supervisor	Employee responsible for the service agreement.
Start date	Date from which the service agreement applies.
End date	Date until which the service agreement applies.
Response time [min]	Reaction time in minutes after the call is received.
Solution time [h]	Solution time for the call in hours.
Disabled	Specifies whether the service agreement is in use.
Description	Description of the service agreement.

4. Save the changes.

## Related topics

- [Assigning products to service agreements](#) on page 14
- [Assigning departments, cost centers, and locations to service agreements](#) on page 14
- [Assigning business roles to service agreements](#) on page 15
- [Assigning escalation procedures to service agreements](#) on page 15
- [Assigning devices to service agreements](#) on page 16


# Assigning products to service agreements

## *To assign products to a service agreement*

1. In the Manager, select the **Help Desk > Basic configuration data > Service agreements** category.
2. Select the service agreement in the result list.
3. Select the **Assign products** task.
4. In the **Add assignments** pane, assign the products.

**TIP:** In the **Remove assignments** pane, you can remove product assignments.

### **To remove an assignment**

- Select the product and double-click .
5. Save the changes.

# Assigning departments, cost centers, and locations to service agreements

## *To assign departments, cost centers, and locations to a service agreement*

1. In the Manager, select the **Help Desk > Basic configuration data > Service agreements** category.
2. Select the service agreement in the result list.
3. Select the **Assign organizations** task.

In the **Add assignments** pane, assign the organizations:

- On the **Departments** tab, assign departments.
- On the **Locations** tab, assign locations.
- On the **Cost centers** tab, assign cost centers.

**TIP:** In the **Remove assignments** pane, you can remove assigned organizations.

### **To remove an assignment**

- Select the organization and double-click ✓.
4. Save the changes.

## Assigning business roles to service agreements

**NOTE:** This function is only available if the Business Roles Module is installed.

### **To assign business roles to a service agreement**

1. In the Manager, select the **Help Desk > Basic configuration data > Service agreements** category.
2. Select the service agreement in the result list.
3. Select the **Assign business roles** task.

In the **Add assignments** pane, select the role class and assign business roles.

**TIP:** In the **Remove assignments** pane, you can remove assigned business roles.

### **To remove an assignment**

- Select the business role and double-click ✓.
4. Save the changes.

## Assigning escalation procedures to service agreements

### **To assign escalation procedures to a service agreement**

1. In the Manager, select the **Help Desk > Basic configuration data > Service agreements** category.
2. Select the service agreement in the result list.
3. Select the **Assign escalation procedures** task.
4. In the **Add assignments** pane, assign the escalation procedures.

**TIP:** In the **Remove assignments** pane, you can remove the escalation procedure assignments.

### **To remove an assignment**

- Select the escalation procedure and double-click ✓.
5. Save the changes.


# Assigning devices to service agreements

## *To assign a device to a service agreement*

1. In the Manager, select the **Help Desk > Basic configuration data > Service agreements** category.
2. Select the service agreement in the result list.
3. Select the **Assign devices** task.
4. In the **Add assignments** pane, assign the devices.

**TIP:** In the **Remove assignments** pane, you can remove the device assignments.


### **To remove an assignment**

- Select the device and double-click .
5. Save the changes.

## Products

Calls taken by default in the One Identity Manager are about devices and workdesks. You can set up products to, for example, enter calls for software, resources, and also departments, cost centers, locations.

### *To create or edit a product*

1. In the Manager, select the category **Help desk > Basic configuration data > Products**.
2. In the result list, select the product and run the **Change main data** task.  
- OR -  
Click  in the result list.



3. Edit the main data.

**Table 9: Product main**

<b>Property</b>	<b>Meaning</b>
Product	Name of the product.
Request level	Claim that the product makes on the call processing, as a numerical value.
Product manager	Employee responsible for the product.
Description	Text field for additional explanation.
Disabled	Specifies whether the product is in use.
Spare option no. 01-Spare option no. 05	You can use the options to define other proprietary product labels.

4. Save the changes.

### Related topics

- [Assigning call types to products](#) on page 17
- [Assigning service agreements to product](#) on page 18


## Assigning call types to products

### *To assign call types to a product*

1. In the Manager, select the category **Help desk > Basic configuration data > Products**.
2. Select an object in the result list.
3. Select the **Assign call types** task.
4. In the **Add assignments** pane, assign call types.

**TIP:** In the **Remove assignments** pane, you can remove call type assignments.

#### **To remove an assignment**

- Select the call type and double-click .
5. Save the changes.

### Related topics

- [Call types](#) on page 9


# Assigning service agreements to product

## *To assign service agreements to a product*

1. In the Manager, select the category **Help desk > Basic configuration data > Products**.
2. Select an object in the result list.
3. Select the **Assign service agreements** task.
4. In the **Add Assignments** pane, assign the service agreements.

**TIP:** In the **Remove assignments** pane, you can remove service agreements assignments.

### **To remove an assignment**

- Select the service agreement and double-click .
5. Save the changes.

## **Related topics**

- [Assigning products to service agreements](#) on page 14

# Support staff and teams

Set up the support staff and support teams that require permissions from the help desk to create and edit calls. Support teams should be seen as virtual help desk support that is available for responding to calls. Assign the staff to the support teams. Membership in support teams determines the calls displayed for the currently logged in help desk staff member. All the calls that a staff member has processed, and the calls that other members of their support team have processed, are displayed.

The help desk login has to take place through an employee related authentication module. Thus support staff who are going work on the help desk are issued with a system user. **viHelpdesk** is supplied as the default system user. This system user has the necessary permissions and the user interface to use the Manager to access the help desk resources in the One Identity Manager database.

## **Detailed information about this topic**

- [Setting up support staff](#) on page 19
- [Creating and editing support teams](#) on page 19
- [Adding staff to support teams](#) on page 21

# Setting up support staff

## *To edit support staff main data*

1. In the Manager, select the **Employees > Employees** category.
2. Select an employee in the result list and run the **Change main data** task.
3. Change to the **Miscellaneous** tab.
  - a. Set the **Help desk employee** option.
  - b. In the **System user** menu, select the **viHelpdesk** option.
  - c. Check the **Default email address**.
4. Save the changes.


**NOTE:** Each employee is shown in the **Help Desk > Basic configuration data > Staff** category and can be edited there.

## Related topics

- [Adding staff to support teams](#) on page 21

# Creating and editing support teams

## *To create and edit a support team*

1. In the Manager, select the **Help desk > Basic configuration data > Support team** category.
2. In the result list, select the support team and run the **Change main data** task.  
- OR -  
Click  in the result list.
3. Enter the required data on the main data form.
4. Save the changes.

## Detailed information about this topic

- [General main data for support teams](#) on page 20
- [Organizational main data for support teams](#) on page 20
- [Custom main data for support teams](#) on page 20
- [Adding staff to support teams](#) on page 21

## General main data for support teams

Enter the following data on the **General** tab.

**Table 10: General main data of a support team**

Property	Description
Display name	Name for displaying the group in the user interface of One Identity Manager tools.
Email address	Support team's email address.
group	Name of the group.
Description	Text field for additional explanation.
Deactivated	Specifies whether the support team in is use. Set this option if you want to block usage by this support team.

## Organizational main data for support teams

Enter the following main data on the **Organizational** tab.

**Table 11: Organizational main data of a support team**

Property	Description
Department	Department to which the team is assigned.
Location	Location to which the team is assigned.
Cost center	Cost center to which the team is assigned.
Office mailbox	Office mailbox.

## Custom main data for support teams

**Table 12: Custom main data for a support team**

Property	Description
Spare field no. 01 ... Spare field no. 10	Additional company-specific information. Use the Designer to customize display names, formats, and templates for the input fields.


# Adding staff to support teams

## *To add staff to a support team*

1. In the Manager, select the **Help desk > Basic configuration data > Support team** category.
2. Select the support team in the result list and run the **Assign employees** task. In the **Add assignments** pane, add employees.

**TIP:** In the **Remove assignments** pane, you can remove assigned employees.

### *To remove an assignment*

- Select the employee and double-click .
3. Save the changes.

## Related topics

- [Setting up support staff](#) on page 19
- [Creating and editing support teams](#) on page 19

# Handling calls

Calls can be added for:

- Employees that reports the problem
- Products that have contract conditions specified
- Device that caused the problem
- Workdesk that caused the problem

In the Manager, calls are filtered in the **Helpdesk** category according to different criteria. The logged in support team member views all the calls they have to process and as well as the calls of their support team.

There are also filters defined that trigger particular actions when they come into effect, for example, checking call activity. If the specified time limit is exceeded, the call wanders from the **In limit** filter to the **At the limit** filter and so on. You can implement company-specific filters. These do not have a time limit but can refer to priorities, status, products, problem type or a member of support.


## Detailed information about this topic

- [Entering and editing calls](#) on page 22
- [Creating call attachments](#) on page 26
- [Creating and displaying call history](#) on page 27

- [Creating a knowledge base on page 27](#)
- [Calculating reaction and solution times of calls on page 29](#)
- [Determining time and effort for calls on page 30](#)
- [Basic data for logging and processing calls on page 5](#)

## Entering and editing calls

### **To create a call**

1. In the Manager, select the **Helpdesk** category and choose a filter.
2. Click  in the result list.
3. Edit the main data.
4. Save the changes.

### **To edit a call**

1. In the Manager, select the **Helpdesk** category and choose a filter.
2. In the result list, select the call and run the **Change main data** task.
3. Edit the main data.
4. Save the changes.

### **Detailed information about this topic**

- [General main data for calls on page 22](#)
- [Solution descriptions for calls on page 24](#)
- [Contact partner for calls on page 25](#)
- [Custom main data for calls on page 26](#)

## General main data for calls

**NOTE:** When a call is added an internal call number is issued. A display name is created from the call number and the name of the employee that logged the call. The call can be found in the different user interface filters by using this name.

Enter the following data on the **General** tab.

**Table 13: General main data of a call**

Property	Description
Date	Time when the call was logged. The date that the call was entered is the

Property	Description
	current date.
Reported by	Employee that reported the problem.
Phone	Employee's telephone number.
product	Product for which the call was logged.
Staff	Support. The employee that is currently logged in is entered as help desk support for this call. This however, can be changed.  <b>NOTE:</b> If the support is deleted from the database at a later date, then a backup of the calls for this support is shown. The calls can no longer be processed.
Call status	Status of the call. The call statuses <b>Investigating, Open, Closed, Customer closed,</b> and <b>Customer response requested</b> are predefined.
Calls received	Type of call received. The call types <b>Telephone call, Fax, Email, Answerphone, SMS,</b> and <b>Letter</b> are predefined.
To solve by	Time by which to resolve the call.
Respond by	Time by which to respond to the call.
Description	Problem description.
Measure	Measures put in place.
Call type	Type of call such as, device error, software error or operator error.
Workdesk	Workdesk that caused the problem.
Device	Device that caused the problem.
Cost center	Cost center for booking.
External escalation level	Name of the escalation level.
Internal escalation level	Name of the escalation level.
Severity	Name of the severity code. The following severity levels are predefined: <ul style="list-style-type: none"> <li>• <b>000, 001, 002</b></li> <li>• <b>Level 1:</b> Critical business impact</li> <li>• <b>Level 2:</b> Significant business impact</li> <li>• <b>Level 3:</b> Minimal business impact</li> <li>• <b>Level 2:</b> Nominal business impact</li> </ul>

Property	Description
Priority	Name of the call priority. The following priorities are predefined: <ul style="list-style-type: none"> <li>• <b>000</b>: not applicable (other)</li> <li>• <b>001</b>: Limited importance</li> <li>• <b>002</b>: Minor</li> <li>• <b>003</b>: Major</li> <li>• <b>004</b>: Very important</li> <li>• <b>005</b>: Extremely important</li> </ul>
Placed on hold on	Date on which the call was put on hold.
Max. on hold [days]	Maximum number of days a call can remain in hold status.
Call added to thesaurus	Specifies whether the call was added to the knowledge base.
Main call active	Main call for this call.
Main call	Specifies whether this call the main call. You can reference all other calls the main call.

### Related topics

- [Calculating reaction and solution times of calls](#) on page 29
- [Creating a knowledge base](#) on page 27
- [Basic data for logging and processing calls](#) on page 5

## Solution descriptions for calls

Enter the following data on the **Solution** tab.

**Table 14: Main data for solution description**

Property	Description
Problem solution	Description of the solution to the problem.
Employees on-site	Employee who can provide on-site support.
Closed by	Employee who closed the call.



Property	Description
Closed on	Date on which the call was closed.
Short call	Specifies whether the call being dealt with is short. If the solution time for a call is less than 5 minutes, it can be classified as a short call. This call is therefore considered to be closed.
Invoiced	Specifies whether the call is invoiced.
Placed on hold	Specifies whether the call is on hold. This option is set if the call is given the corresponding processing status.
Closed	Specifies whether the call is closed. This option is set if the call is given the corresponding processing status.
Archived	Specifies whether the call is archived. This option is set by the <b>Mark help desk calls as history</b> schedule. The task checks the date of closed calls at regular intervals. All calls that have been closed for more than a year are archived.
Program error	Specifies whether the call deals with a program issue.
Process errors	Specifies whether the call deals with a process error.
Operating error	Specifies whether the call deals with an operating error.
Manufacturer error	Specifies whether the call deals with a manufacturer error.

## Contact partner for calls

Enter the following main data on the **Contacts** tab.

**NOTE:** The personal data for the contact person are taken from the employee and cannot be changed.

**Table 15: Contact**

Property	Description
Reported by	Employee that reported the problem.
First name	Employee's first name.
Phone	Employee's telephone number.
Last name	Employee's last name.
Fax	Employee's fax number.
Description	Text field for additional explanation.

Property	Description
Mobile phone	Employee's mobile number.
Additional staff	Additional staff to used as a contact.
First name	Employee's first name.
Phone	Employee's telephone number.
Last name	Employee's last name.
Fax	Employee's fax number.
Description	Text field for additional explanation.
Mobile phone	Employee's mobile number.
Location description	Detailed description of the location.

## Custom main data for calls

**Table 16: User-defined main data**

Property	Description
Spare field no. 01 ... Spare field no. 10	Additional company-specific information. Use the Designer to customize display names, formats, and templates for the input fields.

## Creating call attachments

**Table 17: Configuration parameter for call attachments**

Configuration parameter	Meaning
Helpdesk   Attachment   CreatePathScript	Script for creating the attachments directory. An example implementation is in the VI_AE_CreateAttachmentPath script.
Helpdesk   Attachment   DialogScript	Script for generating the directory path for calls repository. An example implementation is in the VI_AE_GetAttachmentPath script.
Helpdesk   Attachment   RootPath	Root path for call attachments, such as \\SERV01\Attachments.

You can store attachments with a call. Specify the path to the attachments directory in the **Helpdesk | Attachment | RootPath** configuration parameter. When a call is saved, a directory is added that is named by the internal call number.

Edit the configuration parameters in the Designer.

### **To edit an attachment**

1. In the Manager, select the **Help desk** category and select a filter.
2. Select the call in the result list and run the **Attachments** task.  
This opens the attachment directory. You can add, show, and edit files in this directory.
3. Save the changes.

## Creating and displaying call history

In order to follow through incoming calls, a history is available which shows each step in the help desk procedure and the measures that were taken.

### **Prerequisite**

- In the Designer, set the **Helpdesk | TroubleHistory** configuration parameter.  
The call history is written only if this configuration parameter is set. An entry is created in the call history for each action.


### **To display the call history**

1. In the Manager, select the **Helpdesk** category and choose a filter.
2. Select the call in the result list and run the **History** task.  
You can view detailed information for each entry, the support team member and the measures taken for the call.

## Creating a knowledge base

You have the option to build up a knowledge base of reported calls. The thesaurus serves as a catalog where calls are combined under a particular term. The terms that are used do not have to be included in the call description.

### **To define an item for the knowledge base**

1. In the Manager, select the **Help desk > Basic configuration data > Thesaurus** category.
2. Click  in the result list.
3. Enter an item in the thesaurus.
4. Save the changes.

### ***To display the knowledge base***

- In the Manager, select the **Help Desk > Knowledge base** category. Here you can see the calls that are assigned to an item.

### **Related topics**

- [Assigning items to calls](#) on page 28
- [Assigning call types to items](#) on page 28


## **Assigning call types to items**

### ***To assign call types to an item***

1. In the Manager, select the **Help desk > Basic configuration data > Thesaurus** category.
2. Select the item in the result list.
3. Select the **Assign call types** task.
4. In the **Add assignments** pane, assign call types.

**TIP:** In the **Remove assignments** pane, you can remove call type assignments.

#### ***To remove an assignment***

- Select the call type and double-click .
5. Save the changes.

### **Related topics**

- [Call types](#) on page 9

## **Assigning items to calls**


**NOTE:** Calls that are added to the thesaurus are labeled **Call accepted in Thesaurus**.

### ***To assign items to calls***

1. In the Manager, select the **Help desk** category and select a filter.
2. Select the item in the result list.
3. Select the **Thesaurus** task.
4. In the **Add assignments** pane, assign the items.

**TIP:** In the **Remove assignments** pane, you can remove item assignments.

### **To remove an assignment**

- Select the item and double-click .

1. Save the changes.

### **Related topics**

- [Entering and editing calls](#) on page 22

## **Calculating reaction and solution times of calls**

The following information is used to determine reaction times and solution times:

- Service agreements from the employee's cost center
- Service agreements through the employee's department
- Service agreements through the employee's business roles
- Service agreements for the product
- Default settings from configuration parameters

The **Helpdesk | ReactionTime** configuration parameter contains the default time in minutes in which a reaction should take place. The default value is 10 minutes.

The **Helpdesk | SolutionTime** configuration parameter contains the default time in hours in which the issue must be solved. The default value is 48 hours.

In the Designer, you can modify the configuration parameter as required.

Minimum reaction and solution times are determined from all these agreements. Subsequently all the data that has been determined is rounded up to the next working day. The working day is determined by taking the employee's public holidays into account. Public holiday are entered by state (county) in the One Identity Manager. You can add separate public holidays for states. For more information, see the *One Identity Manager Configuration Guide*.

Take into the account the following variations in order of priority to find out to which state the employee is assigned.

- Priority 1: The employee is assigned directly to a state.
- Priority 2: The employee's location is assigned to a state.
- Priority 3: The employee's business role is assigned to a state. If there are several business roles with different states they are sorted alphabetically and the first state is taken.

Employees that come into consideration:

- The employee that logged the call
- Help desk support that logged the call

Because different states could be determined for these employees, processing is controlled by the **Helpdesk | HoliDayRule** configuration parameter. In the Designer, you can modify the configuration parameter as required.

**Table 18: Values of Helpdesk | HoliDayRule configuration parameter**

Value	Meaning
0	With this option, working hours are 24 hours from Monday to Friday. Saturday and Sunday are counted strictly as weekend. Public holidays are not taken into account.
1	With this option, the caller's location determines working hours, weekends, and public holidays.
2	With this option, the help desk staffer's location determines working hours, weekends, and public holidays.
3	With this option, the caller's and the help desk staffer's local working hours, weekends, and public holidays are calculated respectively and the maximum taken from both.
4	With this option, the caller's and the help desk staffer's local working hours, weekends, and public holidays are calculated respectively and the minimum taken from both.

When the working hours are calculated, the following configuration parameters are also observed:

- To exclude public holidays from the working hours calculation, in the Designer set the **QBM | WorkingHours | IgnoreHoliday** configuration parameter.
- To exclude weekends from the working hours calculation, in the Designer, set the **QBM | WorkingHours | IgnoreWeekend** configuration parameter.

### Related topics

- [Service agreements](#) on page 13

## Determining time and effort for calls

The total time and effort is calculated by totaling all processing times. Internal overheads are calculated from processing times that are marked with the **internal** option. The remaining call processing times make up billable overheads.

### *To display a call's processing time*

1. In the Manager, select the **Helpdesk** category and choose a filter.
2. Select the call in the result list and run the **Time and effort** task.

This shows you an overview of the total processing time required for a call and detailed information about the processing time required for each individual call.

## Related topics

- [Logging processing times automatically](#) on page 31
- [Entering processing time manually](#) on page 31

## Logging processing times automatically

### *To log processing time automatically*

- In the Designer, set the **Helpdesk | AutomatedTroubleWorkTimes** configuration parameter.


If the configuration parameter is set, the time from opening the call to saving the call is measured and entered as call processing time. If the configuration parameter is not set, processing times have to be entered manually.

## Related topics

- [Entering processing time manually](#) on page 31

## Entering processing time manually

### *To enter processing times manually*

1. In the Manager, select the **Helpdesk** category and choose a filter.
2. Select the call in the result list and run the **Time and effort** task.
3. Use the  button to the call processing time dialog.
4. Enter the required data:

**Table 19: Call processing time**

Property	Meaning
Date	Date of the call.
Duration	Time it took in minutes to process the call.
Internal	Specifies whether the processing was spent internally.
Remarks	Comments on processing time.

5. Save the changes.

## Related topics

- [Logging processing times automatically](#) on page 31



## Configuration parameters for the Helpdesk Module

The following configuration parameters are additionally available in One Identity Manager after the module has been installed.

**Table 20: Configuration parameters for the Helpdesk Module**

Configuration parameter	Description
Help desk	<p>Preprocessor relevant configuration parameter to control the component parts for the Helpdesk Module. If the parameter is set, the help desk components are available. Changes to this parameter require the database to be recompiled.</p> <p>If you disable the configuration parameter at a later date, model components and scripts that are not longer required, are disabled. SQL procedures and triggers are still carried out. For more information about the behavior of preprocessor relevant configuration parameters and conditional compiling, see the <i>One Identity Manager Configuration Guide</i>.</p>
Helpdesk   Attachment	Specifies whether information about attachments to a call is provided.
Helpdesk   Attachment   CreatePathScript	Script for creating the attachments directory. An example implementation is in the VI_AE_CreateAttachmentPath script.
Helpdesk   Attachment   DialogScript	Script for generating the directory path for calls repository. An example implementation is in the VI_AE_GetAttachmentPath script.
Helpdesk   Attachment   RootPath	Root path for call attachments, such as \\SERV01\Attachments.
Helpdesk   AutomatedTroubleWorkTimes	Specifies how to record the call processing times. If the parameter is set, the time from opening the call to

Configuration parameter	Description
	saving the call is measured and entered as call processing time. If the parameter is not set, processing times have to entered manually.
Helpdesk   ExcludeColumns	List (comma delimited) of TroubleTicket table columns excluded by the blocking logic of IsClosed and IsHistory.
Helpdesk   HoliDayRule	Rules for working hours, weekends, and public holidays in the help desk. These are taken into account when calculating reaction and solution times.
Helpdesk   PersonInTroubleChangeable	Specifies whether the person reporting the issues can be changed.
Helpdesk   ReactionTime	Default time in minutes in which a reaction must take place.
Helpdesk   SolutionTime	Default time in hours in which the issue must be solved.
Helpdesk   TroubleHistory	Specifies whether a call history is logged. An entry is created in the call history for each action.

One Identity solutions eliminate the complexities and time-consuming processes often required to govern identities, manage privileged accounts and control access. Our solutions enhance business agility while addressing your IAM challenges with on-premises, cloud and hybrid environments.

## Contacting us

For sales and other inquiries, such as licensing, support, and renewals, visit <https://www.oneidentity.com/company/contact-us.aspx>.

## Technical support resources

Technical support is available to One Identity customers with a valid maintenance contract and customers who have trial versions. You can access the Support Portal at <https://support.oneidentity.com/>.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

- Submit and manage a Service Request
- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to videos at [www.YouTube.com/OneIdentity](http://www.YouTube.com/OneIdentity)
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product

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