



One Identity Manager 9.3

Help Desk Module User Guide

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Legend

 **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.

 **CAUTION:** A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.

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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 identities, 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 no 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 tickets](#) on page 6
- [Support staff and teams](#) on page 19
- [Handling tickets](#) on page 22
- [Configuration parameters for the Helpdesk Module](#) on page 34

Basic data for logging and processing tickets


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

- Support staff and teams
Set up the support staff and support teams who are given access by the help desk to create and edit tickets. For more information, see [Support staff and teams](#) on page 19.
- Type of incoming ticket
Select the different possible types of incoming tickets, such as phone, fax, email, or letter. For more information, see [Ticket input types](#) on page 7.
- Ticket statuses
Log the possible ticket statuses to describe each processing stage of a ticket. For more information, see [Ticket status](#) on page 7.
- Ticket types
Enter ticket types if you required further categorization. For more information, see [Ticket types](#) on page 9.
- Prioritizing
Enter priorities for tickets if you want to grade them in order of importance. For more information, see [Ticket priorities](#) on page 8.
- Severity codes
Define severity codes for ticket in order to grade the level of disturbance to work through an error. For more information, see [Severity codes](#) on page 11.
- Escalation levels
Enter escalation levels to define handling procedures for incoming tickets. For more information, see [Escalation levels](#) on page 12.
- Escalation procedures
The escalation level helps to define which action should be started for which ticket event. For more information, see [Escalation procedures](#) on page 12.
- Products
Tickets taken by default in the One Identity Manager are about devices and workdesks. You can define additional products for which tickets can be logged. For more information, see [Products](#) on page 17.
- Service agreements
Service agreements can be used to automatically determine reaction times and solution times for tickets. For more information, see [Service agreements](#) on page 13.

Ticket input types

Select the different possible types of incoming tickets, such as phone, fax, email, or letter.

To create or edit a ticket input type

1. In the Manager, select the **Help desk > Basic configuration data > Ticket input type** category.
2. In the result list, select the ticket input type and run the **Change main data** task.
- OR -
Click  in the result list.
3. Edit the main data.
4. Save the changes.

Enter the following data for a ticket input type.


Table 1: Main data for ticket input types

Property	Meaning
Ticket input type	Type of ticket input type. The ticket input types Phone, Fax, Email, Answerphone, SMS, Letter are predefined.
Description	Text field for additional explanation.
Disabled	Specifies whether the ticket input type is used or disabled.

Ticket status

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

To create or edit a ticket status

1. In the Manager, select the **Help desk > Basic configuration data > Ticket status** category.
2. In the result list, select the ticket status and run the **Change main data** task.
- OR -
Click  in the result list.
3. Edit the main data.
4. Save the changes.

Enter the following main data for a ticket status.


Table 2: Ticket status main data

Property	Meaning
Ticket status	Type of ticket status The ticket statuses Investigating , Open , Closed , Customer closed , and Customer response requested are predefined.
Display value	Display value for the ticket status.
Description	Text field for additional explanation.
Disabled	Specifies whether the ticket status is used or disabled.
Closed	Specifies whether the ticket is closed. Closed tickets can no longer be processed.
Placed on hold	Specifies whether the ticket is temporarily on hold. This status temporarily stops a ticket from being processed.

Ticket priorities

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

To create or edit a ticket priority

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

Enter the following data for a ticket priority.

Table 3: Ticket priorities main data


Property	Meaning
Priority	Name of the ticket priority. The following priorities are predefined: <ul style="list-style-type: none">• 000: not applicable (other)• 001: Limited importance• 002: Minor• 003: Major

Property	Meaning
	<ul style="list-style-type: none"> • 004: Very important • 005: Extremely important
Description	Text field for additional explanation.
Disabled	Specifies whether the ticket priority is used or disabled.

Ticket types

Enter ticket types if you require further categorization.

To create or edit a ticket type

1. In the Manager, select the **Help desk > Basic configuration data > Ticket type** category.
2. In the result list, select the ticket type and run the **Change main data** task.
- OR -
Click  in the result list.
3. Edit the main data.
4. Save the changes.

Enter the following main data for a ticket type.

Table 4: Ticket type main data

Property	Meaning
Ticket type	Type of ticket such as, device error, software error or operator error.
Parent ticket type	By specifying a parent ticket type, you build a hierarchical structure.
Product	To enter possible ticket types for a product, assign a product to the ticket type.
Description	Text field for additional explanation.
Disabled	Specifies whether the ticket type is used or disabled.

Related topics

- [Assigning permitted products to ticket types](#) on page 10
- [Assigning knowledge base items to tickets types](#) on page 10

Assigning permitted products to ticket types


Specify which products the ticket types can be used with.

To assign products to a ticket type

1. In the Manager, select the **Help desk > Basic configuration data > Ticket type** category.
2. Select the ticket type in the result list.
3. Select the **Assign permitted 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.

Related topics

- [Products](#) on page 17
- [Assigning permitted ticket types to products](#) on page 18

Assigning knowledge base items to tickets types


Specify which ticket types to assign the knowledge base items to.

To assign items to a ticket type

1. In the Manager, select the **Help desk > Basic configuration data > Ticket type** category.
2. Select the ticket type in the result list.
3. Select the **Assign thesaurus** task.
4. In the **Add assignments** pane, assign the knowledge base items.

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

To remove an assignment

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


Related topics

- [Creating a knowledge base](#) on page 29
- [Assigning ticket types to knowledge base items](#) on page 29

Severity codes

Define severity for ticket 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.
4. Save the changes.

Enter the following main data for a severity code.


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">• 000, 001, 002• Level 1: Critical business impact• Level 2: Significant business impact• Level 3: Minimal business impact• Level 2: Nominal business impact
Description	Text field for additional explanation.
Disabled	Specifies whether the severity level is used or disabled.

Escalation levels

Enter escalation levels to define handling procedures for incoming tickets.

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.
4. Save the changes.

Enter the following main data for an escalation level.

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 used or disabled.

Escalation procedures

The escalation level helps to define which action should be started for which ticket 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.
4. Save the changes.

Enter the following main data for an escalation procedure.

Table 7: Main data for escalation procedures

Property	Meaning
Escalation procedure	Name of the escalation procedure.
Tickets 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 drop-down offers all events that you defined in the Process Editor in the Designer for the TroubleTicket base object.

Example: Escalation procedure

If the condition specified for a ticket is `Severity is 2 and priority is 2`, the escalation procedure `Check(Severity, Priority)` is triggered. A schedule checks regularly whether a ticket 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 staff member dealing with the ticket.

Escalation procedure	<code>Check(severity, priority)</code>
Tickets that meet the condition	<code>ID_TroubleSeverity = '2' and ID_TroublePriority = '2'</code>
Event to be triggered	<code>CallPrio2</code>


Related topics

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

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 ticket 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.
4. Save the changes.

Enter the following main data for a service agreement.

Table 8: Main data for service agreements

Property	Meaning
Service agreement	Name of the service agreement.
Manager or supervisor	Identity 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 ticket is received.
Solution time [h]	Solution time for the ticket in hours.
Disabled	Specifies whether the service agreement is in use.
Description	Description of the service agreement.

Related topics

- [Assigning escalation procedures to service agreements](#) on page 14
- [Assigning products to service agreements](#) on page 15
- [Assigning departments, cost centers, and locations to service agreements](#) on page 16
- [Assigning business roles to service agreements](#) on page 16
- [Assigning devices to service agreements](#) on page 17

Assigning escalation procedures to service agreements


You can assign escalation procedures that will be applied 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.

Related topics

- [Escalation procedures](#) on page 12

Assigning products to service agreements


Assign service agreements to products to determine ticket reaction and solution times.

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.

Related topics

- [Calculating reaction and solution times of tickets](#) on page 30

Assigning departments, cost centers, and locations to service agreements


Assign service agreements to departments, cost centers, and locations to determine ticket reaction and solution times.

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.
4. 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 .
5. Save the changes.

Related topics

- [Calculating reaction and solution times of tickets](#) on page 30

Assigning business roles to service agreements

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


Assign service agreements to business roles to determine ticket reaction and solution times.

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.
4. 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 .
5. Save the changes.

Related topics

- [Calculating reaction and solution times of tickets](#) on page 30

Assigning devices to service agreements


Assign service agreements to devices to determine ticket reaction and solution times.

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.


Related topics

- [Calculating reaction and solution times of tickets](#) on page 30

Products

Tickets taken by default in the One Identity Manager are about devices and workdesks. You can set up products to, for example, enter tickets 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.
4. Save the changes.

Edit the following main data for a product.

Table 9: Product main

Property	Meaning
Product	Name of the product.
Request level	Demand that the product makes on ticket processing, as a numerical value.
Product manager	Identity 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. Use the Designer to customize the display names to meet your requirements.

Related topics

- [Assigning permitted ticket types to products](#) on page 18
- [Assigning service agreements to product](#) on page 19

Assigning permitted ticket types to products


Define which ticket types can be used for a product.

To assign ticket 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 ticket types** task.
4. In the **Add assignments** pane, assign ticket types.

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

To remove an assignment

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

Related topics

- [Ticket types](#) on page 9
- [Assigning permitted products to ticket types](#) on page 10

Assigning service agreements to product


Assign service agreements to products to determine ticket reaction and solution times.

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 15

Support staff and teams

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

The help desk login has to take place through an identity related authentication module. Thus identities 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.

Detailed information about this topic

- [Setting up support staff](#) on page 20
- [Creating and editing support teams](#) on page 20
- [Adding staff to support teams](#) on page 22

Setting up support staff

Set up the staff who are given access by the help desk to create and edit tickets.

To edit the main data of a member of the support staff

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

NOTE: Each identity 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 22

Creating and editing support teams

Set up the support teams who are given access by the help desk to create and edit tickets.

To create and edit a support team

1. In the Manager, select the **Help desk > Basic configuration data > Support teams** 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 21
- [Organizational main data for support teams](#) on page 21
- [Custom main data for support teams](#) on page 22
- [Adding staff to support teams](#) on page 22

General main data for support teams

Enter the following general main data.

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 is used or disabled. Set this option if you want to block usage by this support team.

Organizational main data for support teams

Enter the following organizational main data.

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

Enter any custom master data. Use the Designer to customize display names, formats, and templates for the input fields.

Table 12: Custom main data for a support team

Property	Description
Spare field no. 01 ... Spare field no. 10	Additional company-specific information.

Adding staff to support teams


Assign the staff to the support teams. Membership in support teams determines the tickets displayed for the currently logged in help desk staff member. All the tickets that a staff member has processed, and the tickets that other members of their support team have processed, are displayed.

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 identities** task.
In the **Add assignments** pane, add identities.

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

To remove an assignment

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

Related topics

- [Setting up support staff](#) on page 20
- [Creating and editing support teams](#) on page 20

Handling tickets

Tickets can be added for:

- The identity that reports the problem
- Products that have contract conditions specified

- Device that caused the problem
- Workdesk that caused the problem

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

There are also filters defined that trigger particular actions when they come into effect, for example, checking ticket activity. If the specified time limit is exceeded, the ticket 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 tickets](#) on page 23
- [Creating ticket attachments](#) on page 28
- [Creating and displaying ticket history](#) on page 28
- [Creating a knowledge base](#) on page 29
- [Calculating reaction and solution times of tickets](#) on page 30
- [Determining time and effort for tickets](#) on page 32
- [Basic data for logging and processing tickets](#) on page 6

Entering and editing tickets

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

NOTE: Closed tickets can no longer be processed.

To create a ticket

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 ticket

1. In the Manager, select the **Helpdesk** category and choose a filter.
2. In the result list, select the ticket 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 tickets](#) on page 24
- [Solution descriptions for tickets](#) on page 26
- [Contact partner for tickets](#) on page 27
- [Custom main data for tickets](#) on page 27

General main data for tickets

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

Enter the following general main data.

Table 13: General main data of a ticket

Property	Description
Date	Time when the ticket was logged. The date that the ticket was entered is the current date.
Reported by	Identity that reported the problem.
Phone	Identity's telephone number.
Product	Product for which the ticket was logged.
Staff	Support. The identity that is currently logged in is entered as help desk support for this ticket. This however, can be changed. NOTE: If the support is deleted from the database at a later date, then a backup of the tickets for this support is shown. The tickets can no longer be processed.
Ticket status	Status of the ticket. The ticket statuses Investigating , Open , Closed , Customer closed , and Customer response requested are predefined.
Ticket input type	Type of ticket input. The ticket input types Phone , Fax , Email , Answerphone , SMS , Letter are predefined.
To solve by	Time by which to resolve the ticket.
Respond by	Time by which to respond to the ticket.
Description	Problem description.
Measure	Measures put in place.
Ticket type	Type of ticket such as, device error, software error or operator error.

Property	Description
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"> • 000, 001, 002 • Level 1: Critical business impact • Level 2: Significant business impact • Level 3: Minimal business impact • Level 2: Nominal business impact
Priority	Name of the ticket priority. The following priorities are predefined: <ul style="list-style-type: none"> • 000: not applicable (other) • 001: Limited importance • 002: Minor • 003: Major • 004: Very important • 005: Extremely important
Placed on hold on	Date on which the ticket was put on hold.
Max. on hold [days]	Maximum number of days a ticket can remain in hold status.
Ticket added to thesaurus	Specifies whether the ticket was added to the knowledge base.
Main tickets active	Main ticket for this ticket.
Main ticket	Specifies whether this ticket the main ticket. You can reference this main ticket in subsequent tickets.

Related topics

- [Calculating reaction and solution times of tickets](#) on page 30
- [Creating a knowledge base](#) on page 29
- [Basic data for logging and processing tickets](#) on page 6

Solution descriptions for tickets

Enter the following for the solution description.

Table 14: Main data for solution description

Property	Description
Problem solution	Description of the solution to the problem.
On site contact	Identity or support team that can provide on-site support.
Closed by	Identity that closed the ticket.
Closed on	Date on which the ticket was closed.
Short ticket	Specifies whether the ticket being dealt with is short. If the solution time for a ticket is less than 5 minutes, it can be classified as a short call. This ticket is therefore considered closed.
Invoiced	Specifies whether the ticket is invoiced.
Placed on hold	Specifies whether the ticket is on hold. This option is set if the ticket is given the corresponding processing status.
Closed	Specifies whether the ticket is closed. This option is set if the ticket is given the corresponding processing status.
Archived	Specifies whether the ticket is archived. This option is set by the Mark help desk tickets as history schedule. The task checks the date of closed tickets at regular intervals. All tickets 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 tickets

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

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

Table 15: Contact

Property	Description
Reported by	Identity that reported the problem.
First name	Identity's first name.
Phone	Identity's telephone number.
Last name	Identity's last name.
Fax	Identity's fax number.
Description	Text field for additional explanation.
Mobile phone	Identity's mobile number.
Additional staff	Additional member of staff to deal with this ticket.
First name	Identity's first name.
Phone	Identity's telephone number.
Last name	Identity's last name.
Fax	Identity's fax number.
Description	Text field for additional explanation.
Mobile phone	Identity's mobile number.
Location description	Detailed description of the location.

Custom main data for tickets

Enter any custom master data. Use the Designer to customize display names, formats, and templates for the input fields.

Table 16: Customized main data

Property	Description
Spare field no. 01 ... Spare field no. 10	Additional company-specific information.

Creating ticket attachments

Table 17: Configuration parameters for ticket 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 tickets repository. An example implementation is in the VI_AE_GetAttachmentPath script.
Helpdesk Attachment RootPath	Root path for ticket attachments, such as \\SERV01\Attachments.

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

In order to follow through incoming tickets, 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 ticket history is written only if this configuration parameter is set. An entry is created in the ticket history for each action.

To display a ticket's history


1. In the Manager, select the **Helpdesk** category and choose a filter.
2. Select the ticket in the result list and run the **Attachments** 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 tickets. The thesaurus serves as a catalog where tickets are combined under a particular term. The terms that are used do not have to be included in the ticket 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 tickets that are assigned to an item.

Related topics

- [Assigning knowledge base items to tickets](#) on page 30
- [Assigning ticket types to knowledge base items](#) on page 29
- [Assigning knowledge base items to tickets types](#) on page 10

Assigning ticket types to knowledge base items

Specify which ticket types to assign the knowledge base items to.

To assign ticket 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 ticket type** task.
4. In the **Add assignments** pane, assign ticket types.
| **TIP:** In the **Remove assignments** pane, you can remove ticket type assignments.

To remove an assignment

- Select the ticket type and double-click .

5. Save the changes.

Related topics

- [Ticket types](#) on page 9
- [Assigning knowledge base items to tickets types](#) on page 10

Assigning knowledge base items to tickets


NOTE: Tickets that are added to the thesaurus are labeled **Ticket accepted in Thesaurus**.

To assign items to tickets

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 tickets](#) on page 23

Calculating reaction and solution times of tickets

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

- Service agreements from the identity's cost center
- Service agreements from the identity's department
- Service agreements through the identity'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 to the ticket 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 identity'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 identity is assigned.

- Priority 1: The identity is assigned directly to a state.
- Priority 2: The identity's location is assigned to a state.
- Priority 3: The identity'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.

Identities that come into consideration:

- The identity that logged the ticket
- The help desk staff members who accepted the ticket

Because different states could be determined for these identities, 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.

Value	Meaning
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 tickets

You can enter the time taken for processing automatically or manually. The total time and effort is calculated from the all the processing times. This shows you an overview of the total processing time required for a ticket and detailed information about the processing time required for each individual ticket.

To display a ticket's processing time

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

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

- **Billable effort [min]**: Processing times in minutes that are not labeled with the **Internal** option.
- **Internal effort [min]**: Processing times in minutes that are labeled with the **Internal** option.
- **Time and Effort Summary**: Summary of time and effort taken individually.

Related topics

- [Logging processing times automatically](#) on page 33
- [Entering processing time manually](#) on page 33

Logging processing times automatically

To log processing times automatically, in the Designer, set the **Helpdesk | AutomatedTroubleWorkTimes** configuration parameter.

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

Related topics


- [Entering processing time manually](#) on page 33

Entering processing time manually

| NOTE: Closed tickets can no longer be processed.

If you do not enter the processing times automatically, you can enter them manually.

To enter processing times manually

1. In the Manager, select the **Helpdesk** category and choose a filter.
2. Select the ticket 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.
 - **Date:** Date of processing.
 - **Duration:** Time it took in minutes to process the call.
 - **Internal:** Specifies whether the processing time was spent internally.
 - **Remarks:** Remarks about processing time.
5. Save the changes.

Related topics

- [Logging processing times automatically](#) on page 33

Configuration parameters for the Helpdesk Module

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

Table 19: 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 no 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 ticket 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 tickets repository. An example implementation is in the VI_AE_GetAttachmentPath script.
Helpdesk Attachment RootPath	Root path for ticket attachments, such as \\SERV01\Attachments.
Helpdesk AutomatedTroubleWorkTimes	Specifies how to record the ticket processing times. If the parameter is set, the time from opening the ticket

Configuration parameter	Description
	to saving the ticket is measured and entered as ticket 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 identity reporting the issues can be changed.
Helpdesk ReactionTime	Default time in minutes in which a reaction to the ticket capture must take place.
Helpdesk SolutionTime	Default time in hours in which the issue must be solved.
Helpdesk TroubleHistory	Specifies whether a ticket history is logged. An entry is created in the ticket 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
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product

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