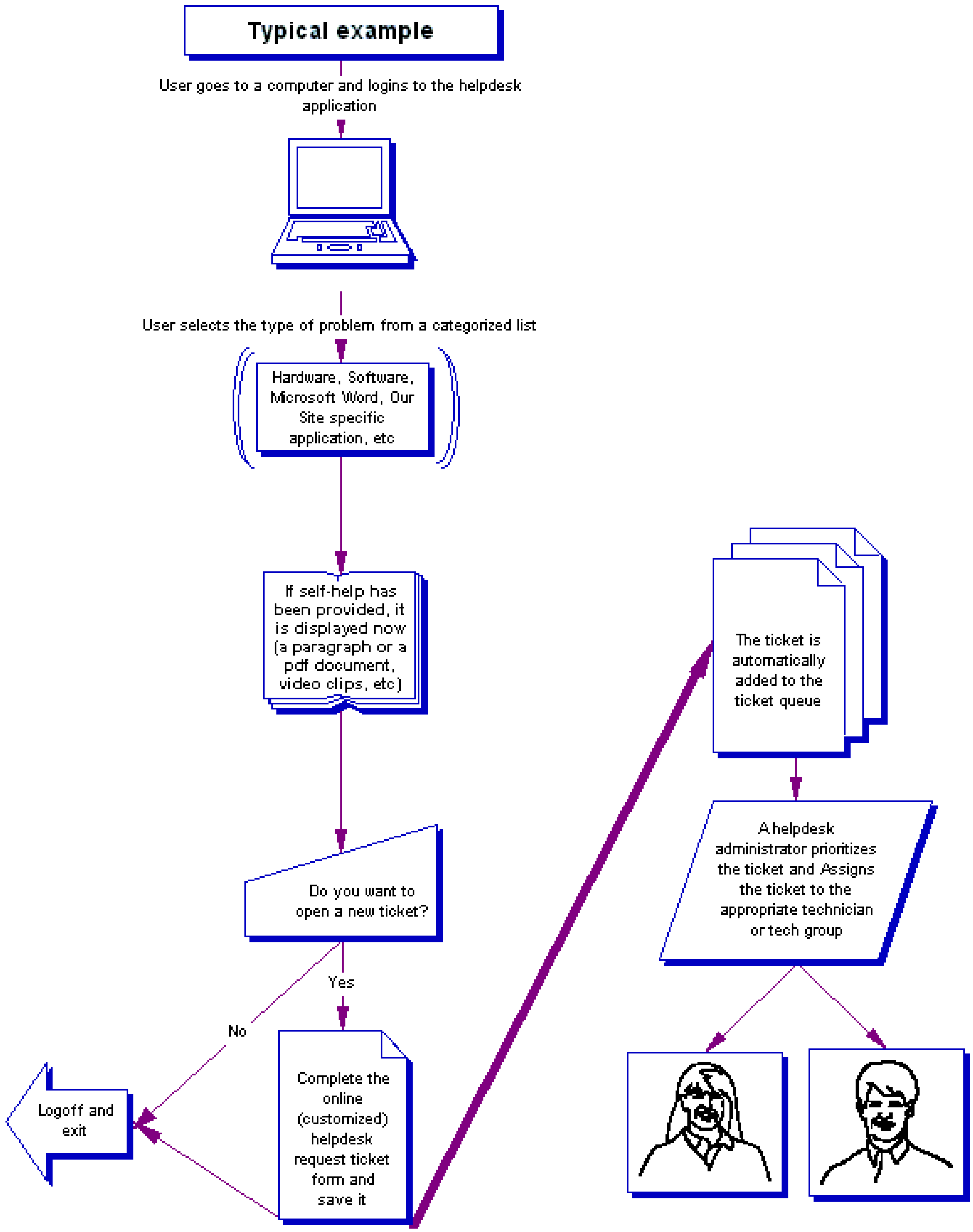
SchoolHelpDesk.net

Administrator's Guide

Overview:


Typical example
User goes to a computer and logins to the helpdesk application
User selects the type of problem from a categorized list
Hardware, Software, Microsoft Word, Our Site specific application, etc
If self-help has been provided, it is displayed now (a paragraph or a pdf document, video clips, etc)
Do you want to open a new ticket?
Yes
No
Logoff and exit
Complete the online (customized) helpdesk request ticket form and save it
The ticket is automatically added to the ticket queue
A helpdesk administrator prioritizes the ticket and Assigns the ticket to the appropriate technician or tech group

What is it:

A helpdesk solution allows a single point of problem tracking. Think of a ticket as a form. You, the administrator, can select what items on the form the user sees. You can also set some basic rules. For example, you can require that they include a description of the problem. Once the user completes a ticket request, it goes into a queue marked as unassigned and not completed. You can assign the ticket to a tech or a tech group and track the progress of all tickets.

You can get reports (either on-demand or on-schedule) that let you know what has been done and what is left to be done.

The helpdesk application organizes the paperwork and work-flow to make you and your users most efficient. You can now concentrate on the priority issues and get to the lesser priorities as time permits. We do not always have enough resources to do everything that is requested, so the program helps you stay focused on the things that are most important.

Administrator – Setup

From the overview (typical example), there are a few key steps.

User logs into the helpdesk: That means the user name must already be in the helpdesk database before they can login. You can either add users manually or you can import the users from your LDAP server. See **How To Add a new user**

User selects the type of problem from a categorized list: To get the most from a self-help system, you need to have the self-help configured. This provides the biggest payback but it also requires time to do it. See **How To Add a new Self Help Item**

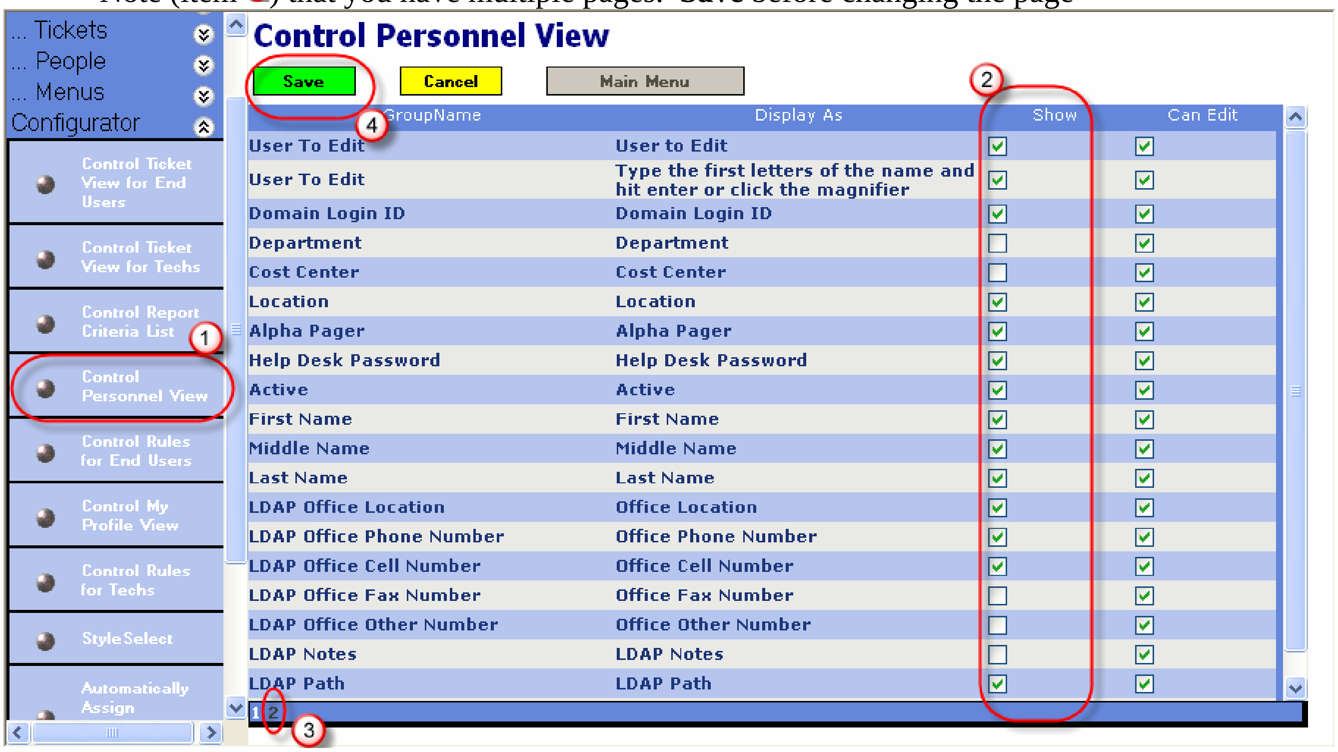
…

How To Add a new user

Determine what items to display on the personnel list

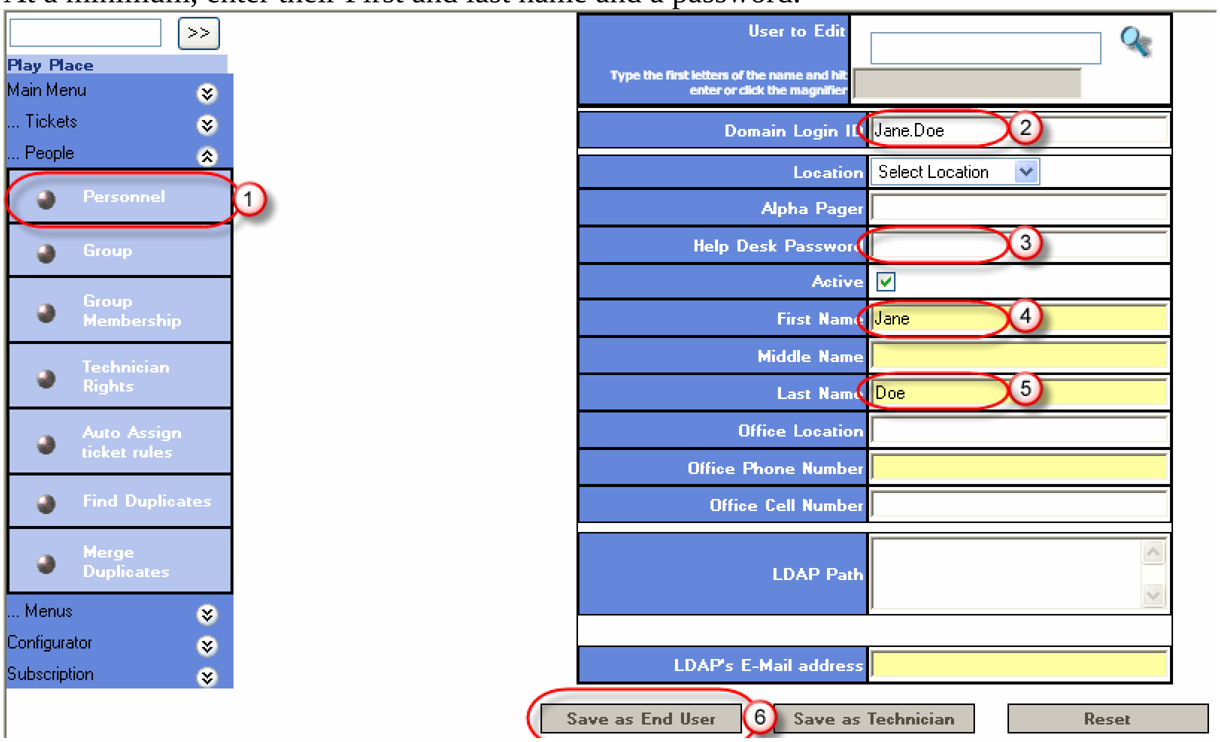
(Normally this is done only once)

- Login as an administrator
- Select the “Configurator” menu group
- Select the “Control Personnel View” menu item
- Check the items that you want to display and click save
- Note (item ③) that you have multiple pages. **Save** before changing the page



Manually add a user.

- Login as an administrator
- Select the "People" menu group
- Select the "Personnel" menu item
- Enter a unique name in the "Domain Login ID" this is the name that the user logins into the helpdesk application with. Typically, this is also the email address if you append your @YourDomain.com extension. However, if this would not be there email address, then you have to enter the complete email address in the "LDAP's E-Mail address" field or we would not be able to send them any emails.
- At a minimum, enter their First and last name and a password.



Add users by syncing with LDAP

From The server:

- Double click the "HelpDeskPatcher" icon from the desktop … or you can use explorer to c:\Program Files\LanWorks\Helpdesk\HelpDeskPatcher.exe
- Confirm "OK" at the application name (probably "Helpdesk")
- Click "Change Basic Configuration"
- Enter the path to your LDAP server as LDAP://123.123.123.123
- For now (1st pass) leave "Bypass LDAP authentication" as true … this is so we can login and change the settings.
- Click OK past the other questions
- Exit the patcher program

From the browser on the Helpdesk server:

- Launch a browser window (Internet Explorer)
- Enter the path to your helpdesk application (example http://MyServer/helpdesk)
- Check the box "By pass LDAP: and login as Admin
- ***Optional if you do not see the menu options:*** you may have to add this site as a trusted site to see the menu .. Tools->Internet Options->Security Tab->Trusted Sites->Sites->Uncheck Require Server Verification Https and click Add. OK out and close the options window and click refresh)
- From the menu select Configurator->Menu Editor-> find the 3 LDAP menu items (2nd page) and check for Admin to see and click save
- Click refresh on your browser and you should see a menu menu group called "LDAP"
- Click LDAP group->System parameters and set the 6 LDAP parameters per the following example:

Item	Value
LDAP Exclusions	OU=XPWorkstations|OU=Students
LDAP Password	Mypassword
LDAP Path	*
LDAP Type	ADS
LDAP User	MyDomain\myADSid
LDAP User Key	cn=

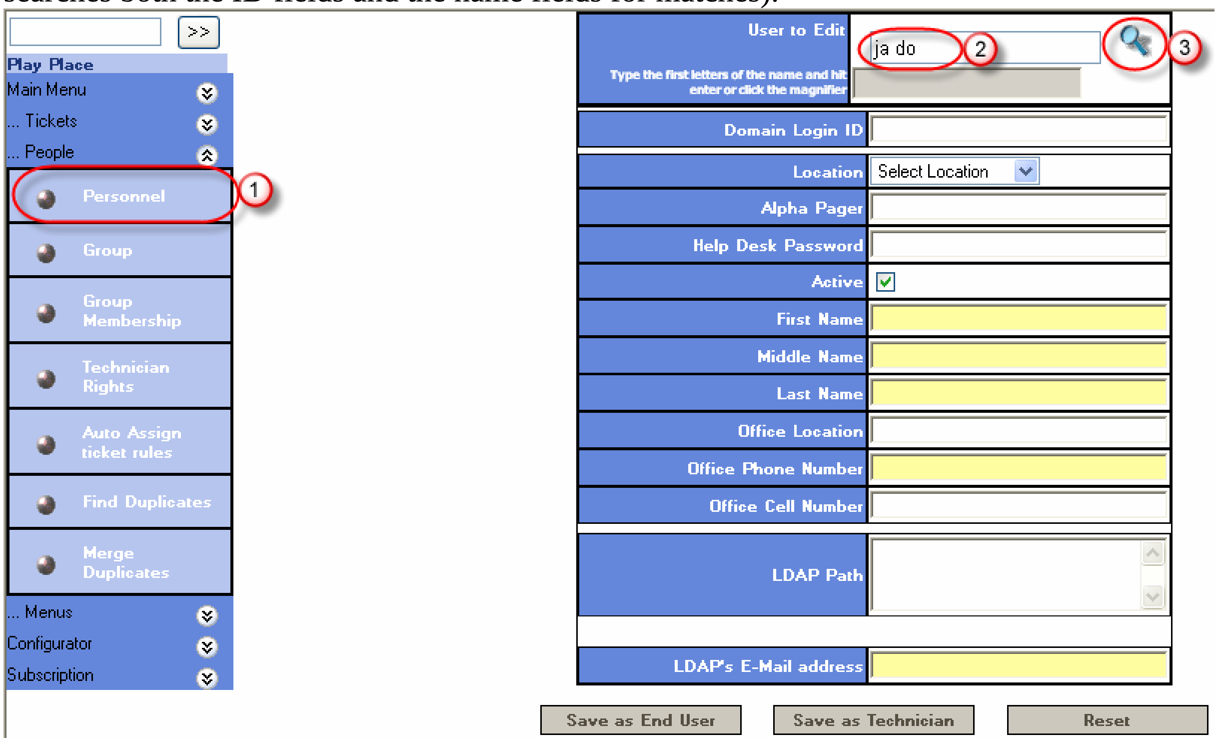
- Click menu item "Manually sync LDAP"
- Click "Full Sync" … make note and fix any issues as listed above "LDAP Sync" (it reads from the top down)
- If your LDAP server is Novel, make sure to change "LDAP Type" to NDS. You will also need to uncheck "TLS to bind for simple password" in Nwadmin/ConsoleOne for the LDAP server group.

After testing and the initial sync is done. From The server:

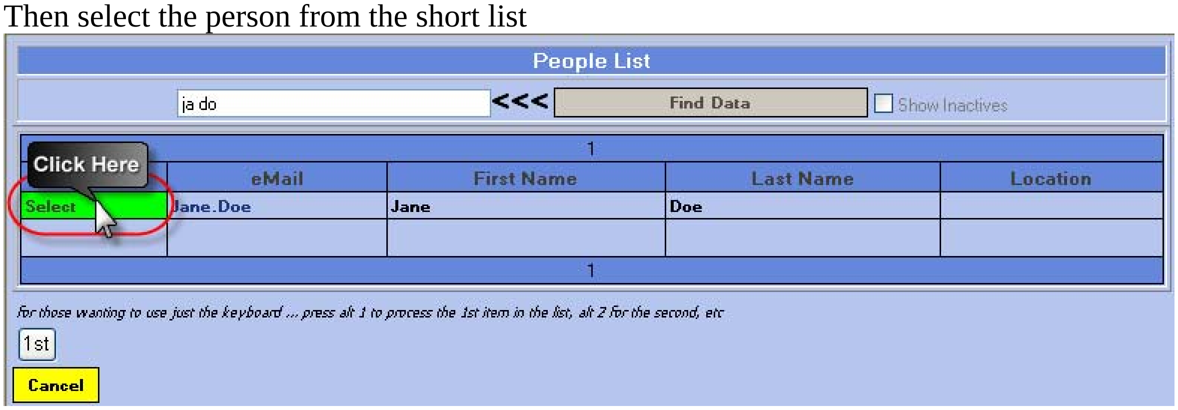
- Double click the "HelpDeskPatcher" icon from the desktop … or you can use explorer to c:\Program Files\LanWorks\Helpdesk\HelpDeskPatcher.exe
- Confirm "OK" at the application name (probably "Helpdesk")
- Click "Change Basic Configuration"
- Confirm the path to your LDAP server as LDAP://123.123.123.123
- **Change "Bypass LDAP authentication" to blank … else users can login without a password)**
- Click OK past the other questions
- Exit the patcher program

How To make a user a technician

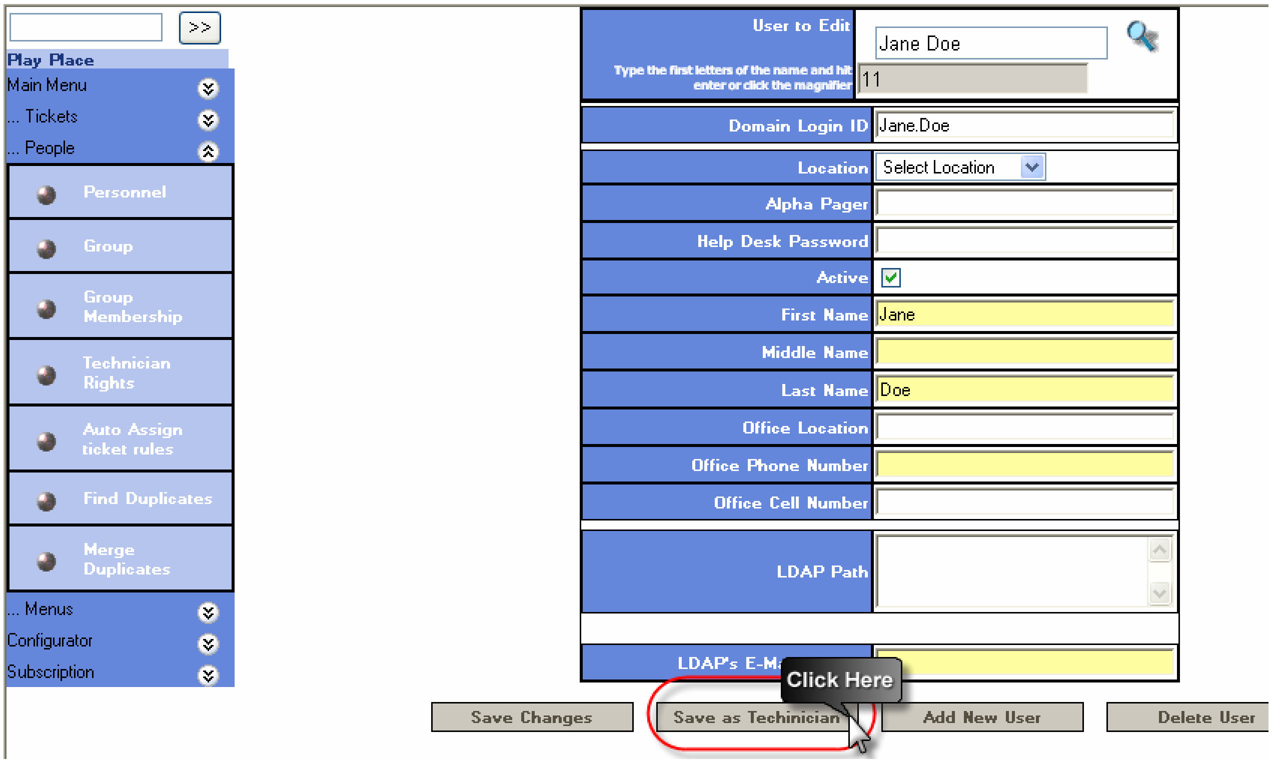
- Login as an administrator
- Select the “People” menu group
- Select the “Personnel” menu item
- Enter the first few letters of the name in the “User to Edit” box and click the magnifying glass (note that you can use a space as a wild card … example: if you are looking for Jane Doe, you can use the 1st 2 letters of the first name and the last 2 letters of the last name and the program searches both the ID fields and the name fields for matches).



- Then select the person from the short list

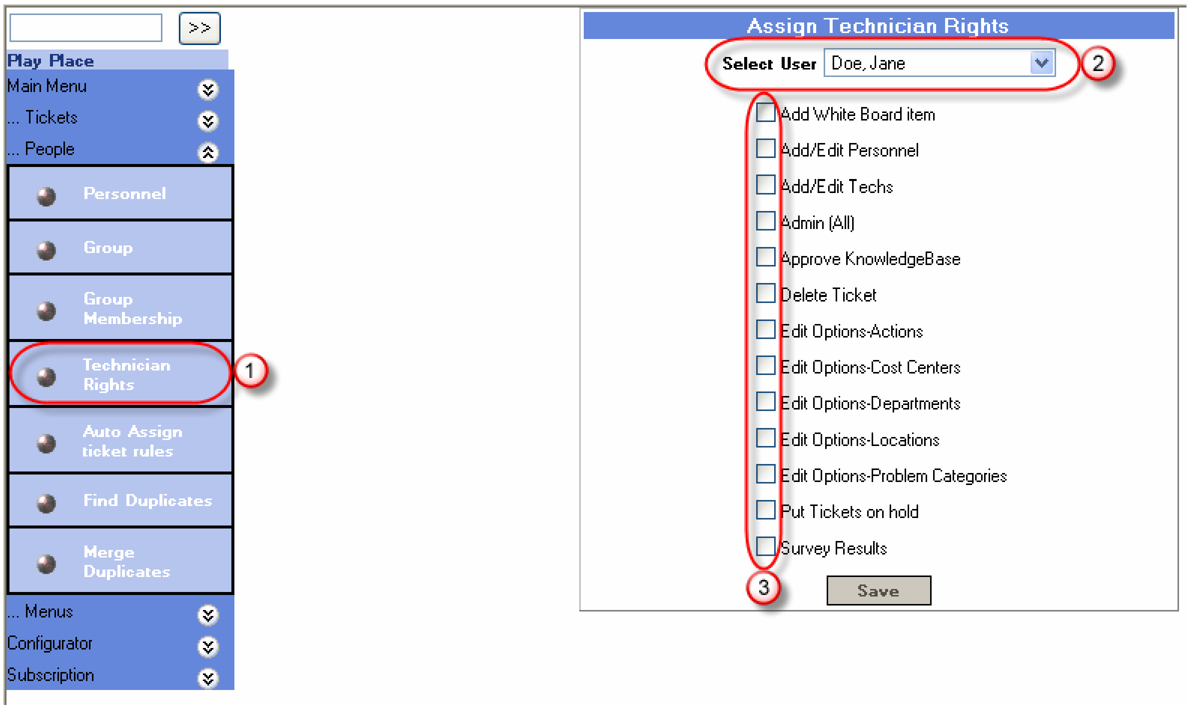


- Then click Save as Technician



How To Give rights to a technician

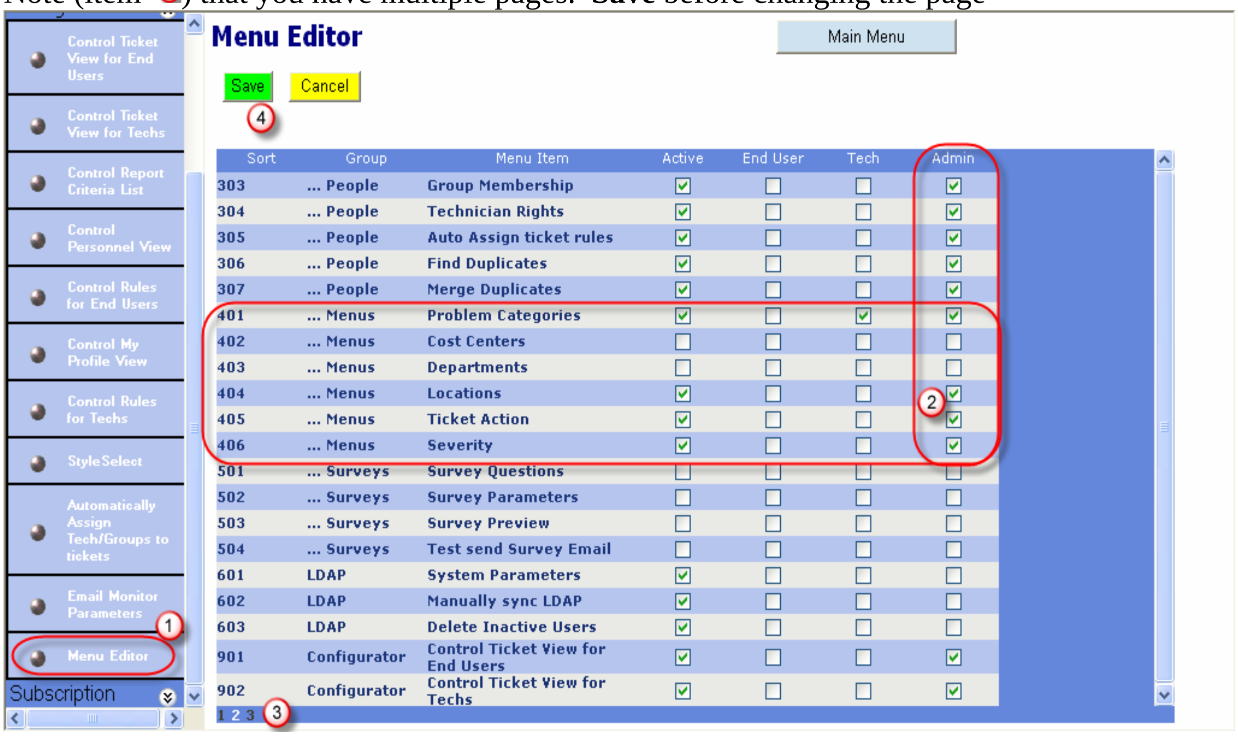
- Login as an administrator
- Select the “People” menu group
- Select the “Technician Rights” menu item
- Select the technician’s name from the drop down list
- Check the items that you want them to have. If you want them to be an administrator, then check “Admin (All)”
- Click SAVE



How To Add a new drop down option

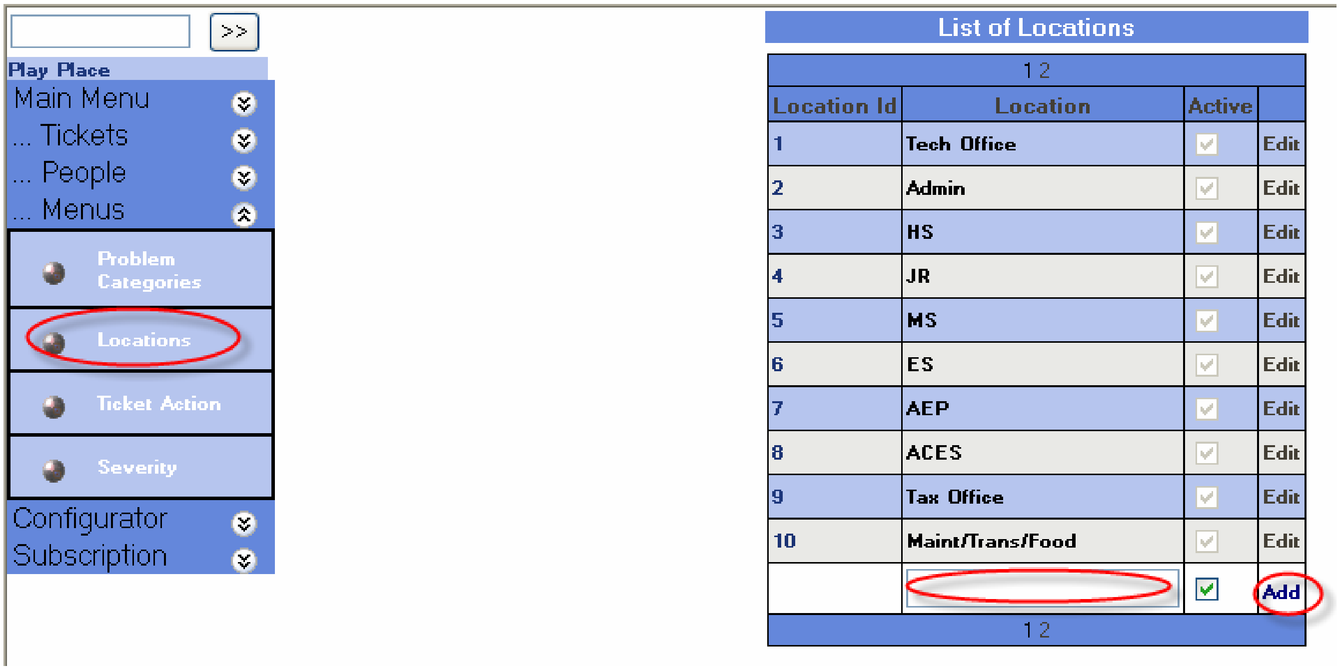
You can control if you display cost center, department, location, Ticket Action and Severity items and what items to display in those lists.

How to add/remove an item to the menu:

- Login as an administrator
- Select the “Configurator” menu group
- Select the “Control Personnel View” menu item
- Check the items that you want to display and click save
- Note (item 3) that you have multiple pages. **Save** before changing the page
- 

To add an option to the dropdown:

- Login as an administrator
- Select the “Menus” menu group
- Select the “Locations” menu item (or the item you wish to change)
- Enter a description in the last blank text box and click add



How To Add a new Self Help Item

You and your team should know what kind of problems that the user can (or should) be able to solve on their own. As an example, they might ask “how to do I add a student to our grade book application”? The categorized list is three tiered: System, category detail. As an example, “Grade book” would be the system. “How to” would be the category and “Add a student” would be the detail. You can then provide a detailed step-by-step instruction on how to do this. You can also attach a PDF or add a hyperlink to another web site that describes how to do it as well.

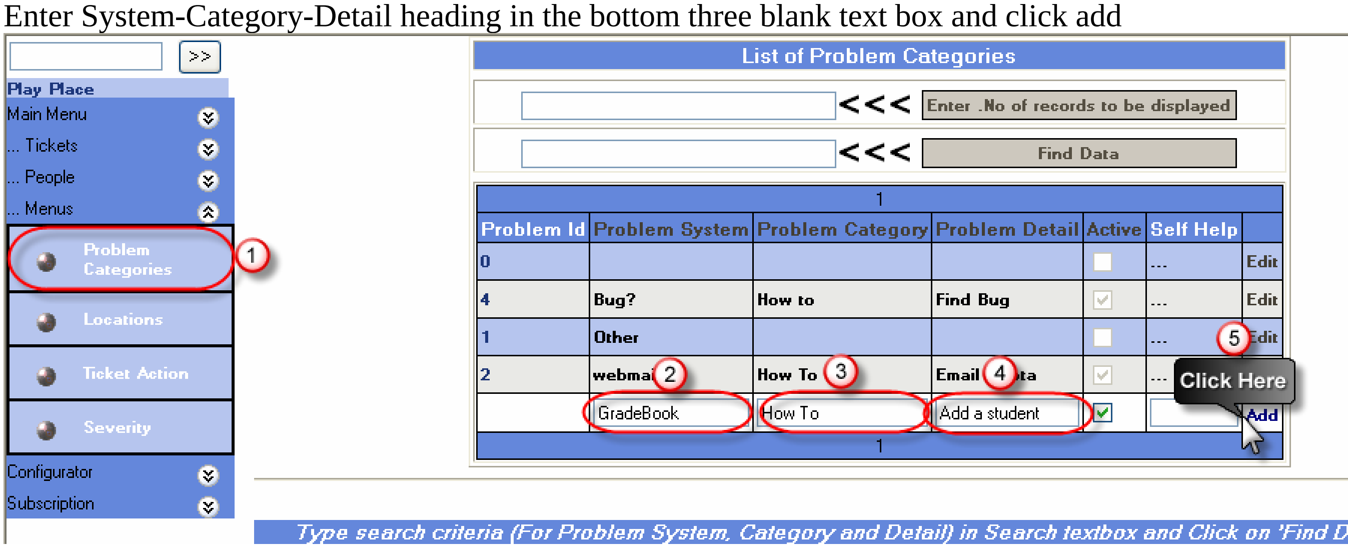
But what if the problem was a broken mouse? Obviously the user cannot solve this on their own, but you want them to make the request in such a way that the tech knows before he goes on site what he needs to bring. As an example, “Computer” would be the system. “Mouse” would be the category and “sticky” would be the detail.

The self-help system is tailored to your environment because you maintain its layout and content. So planning is important, but it is more important to at least start with your most frequent questions that will have the highest chance of the users helping themselves.

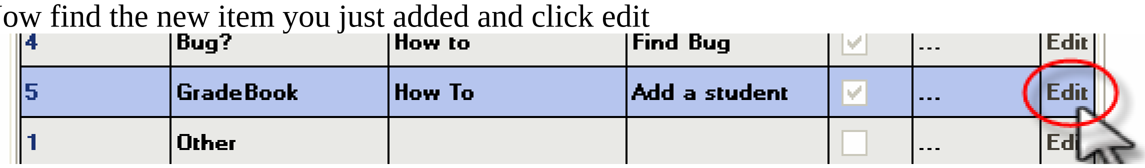
You will likely continue to tweak and improve the logical hierarchy of self help options, so do not worry that your design is not complete. We suggest categorizing your problems in a terminology that your users can understand. For instance, hardware vs. software may be logical to us techs, but the user will gain more if you specify Computer, grade book, email, Microsoft Office, etc.

Add a new item

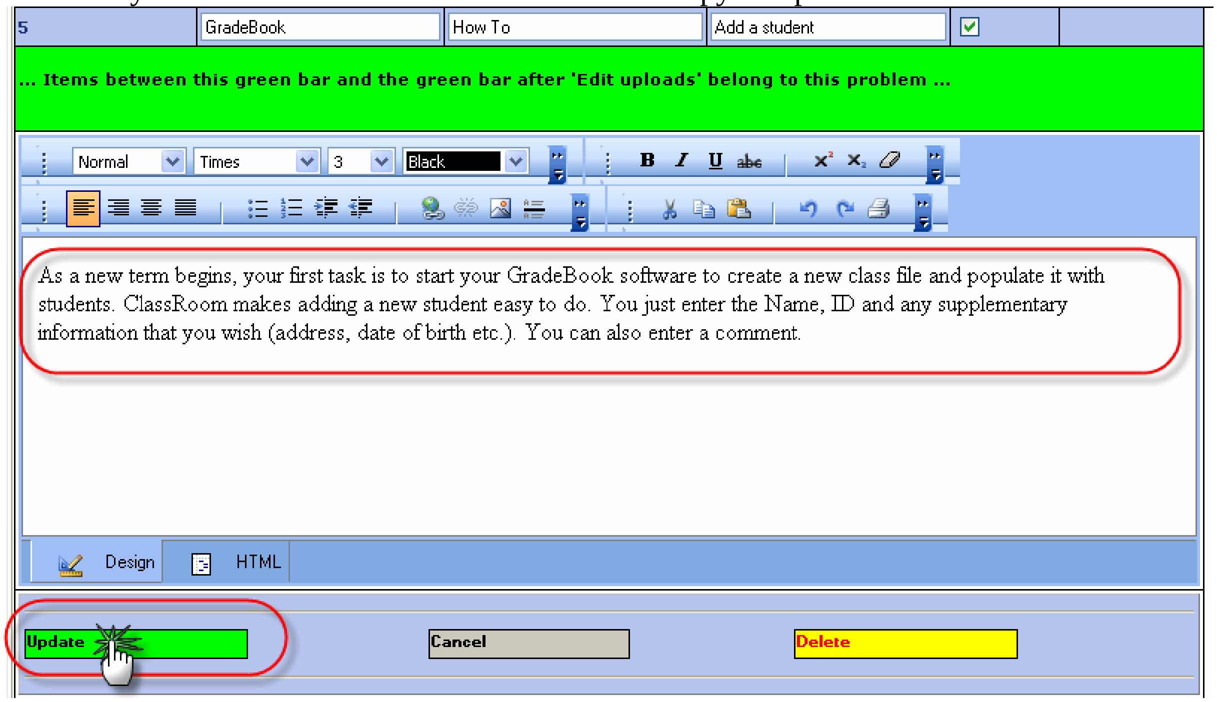
- Login as an administrator
- Select the “Menus” menu group
- Select the “Problem Categories” menu item
- Enter System-Category-Detail heading in the bottom three blank text box and click add



- Now find the new item you just added and click edit



- Type some meaningful help and click update. Note that this is an HTML text editor so you can format as you wish. But most users find it easier to copy and paste from an online reference



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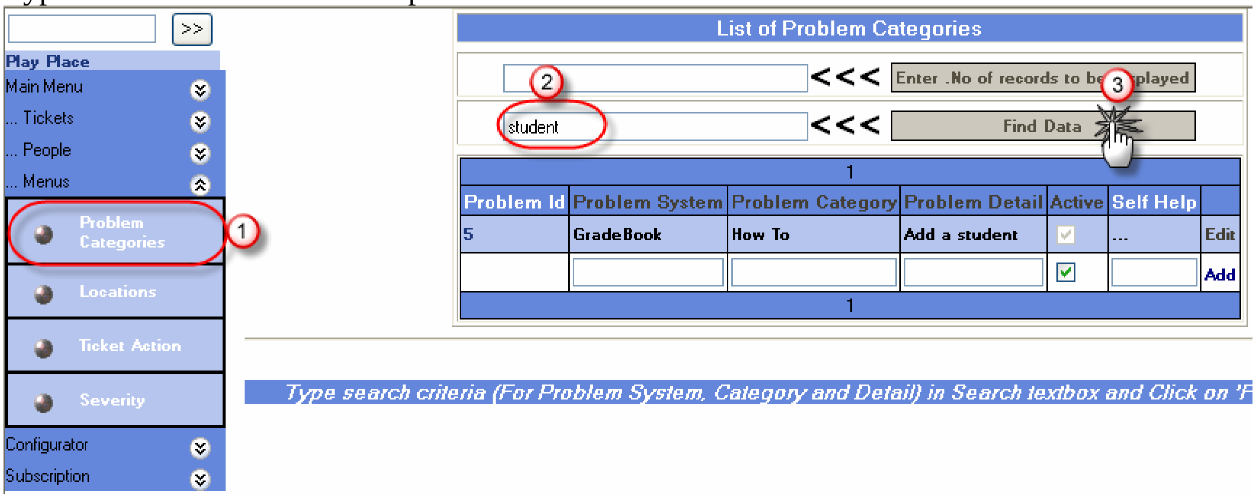
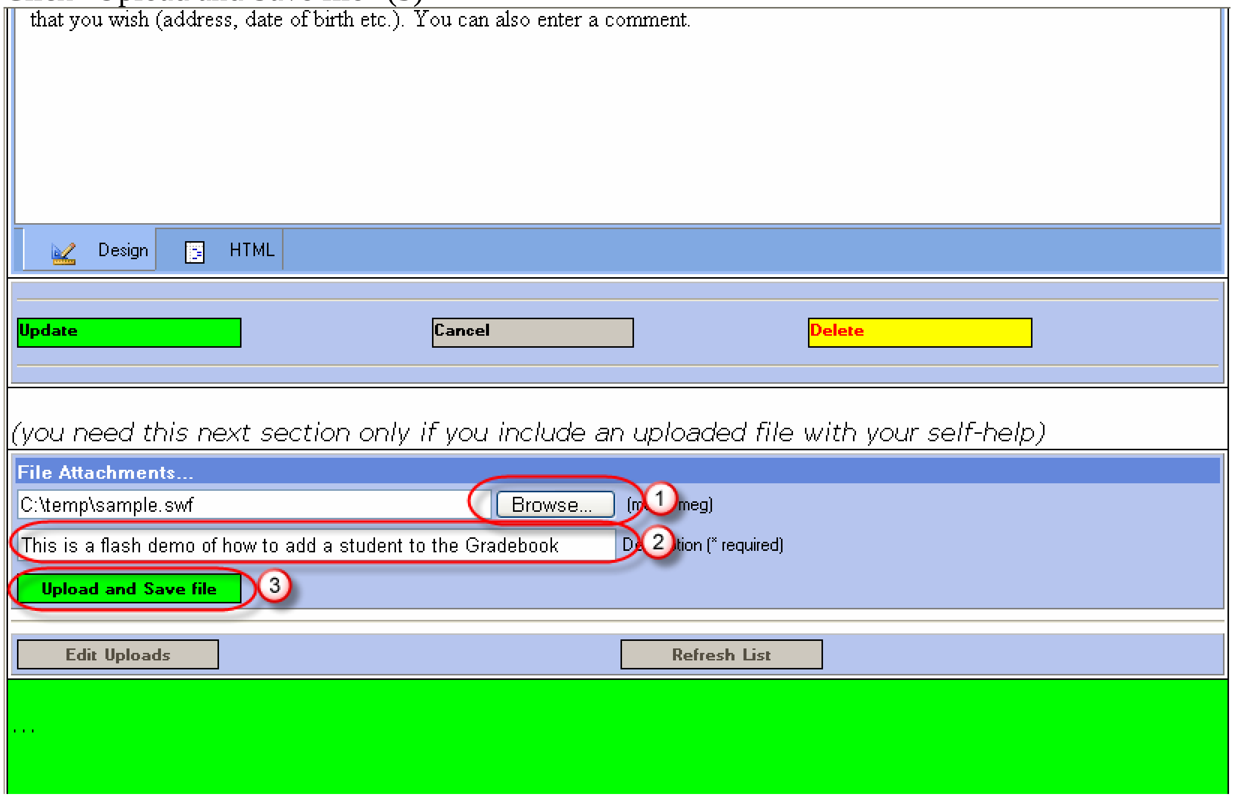
Make sure to click Update!

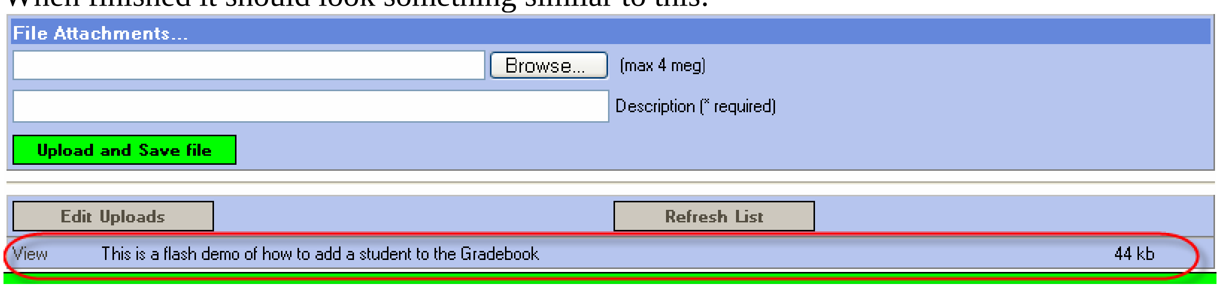
Add an attachment to a self-help item

- Login as an administrator
- Select the “Menus” menu group
- Select the “Problem Categories” menu item
- Type the first few letters of the problem into the “Find data” text field and click “Find Data”



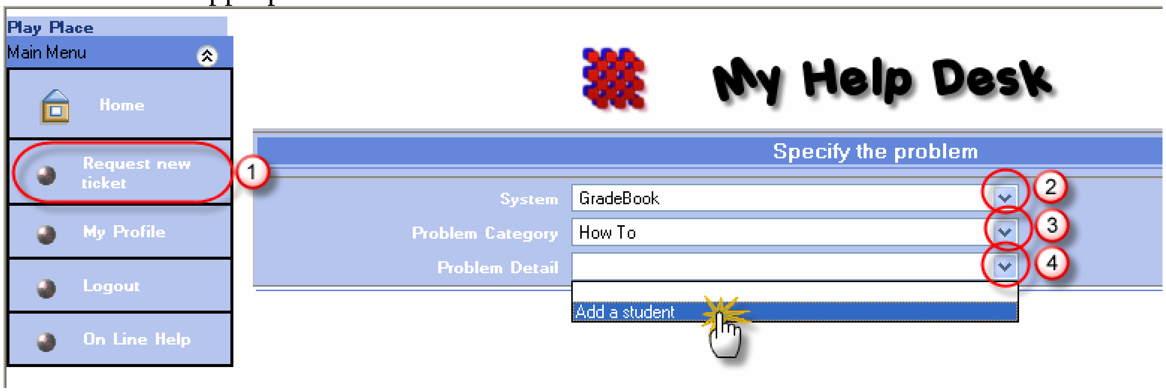
- Click edit for that item

- Look under the heading called “File attachments” and click “Browse” and use the pop-up to locate the file you want to upload.(1)
- Add a description (2)
- Click “Upload and Save file” (3)
- 

- When finished it should look something similar to this:
- 

How to view a self help

- Login as any user, tech or administrator
- The "Main Menu" should already be selected when you login
- Select the "Request new ticket" menu item
- Select System (2)
- Category (3)
- Detail (4)
- And select the appropriate item



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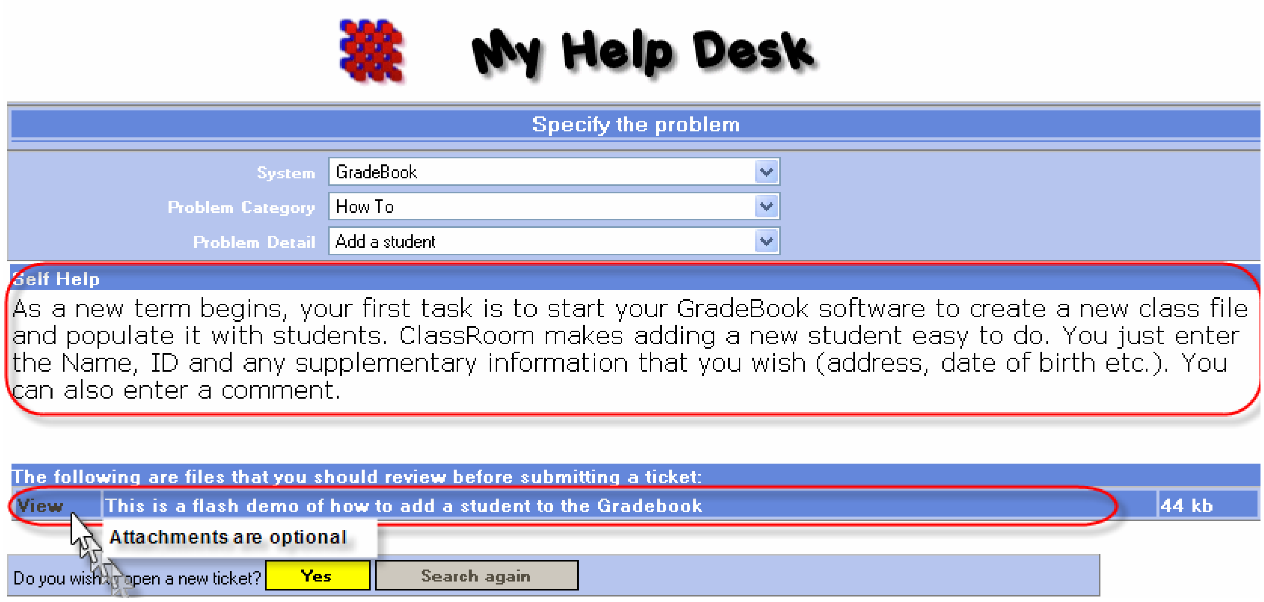
- The user is then displayed anything that you typed in the self-help and (if included) they can click and view the attachments.



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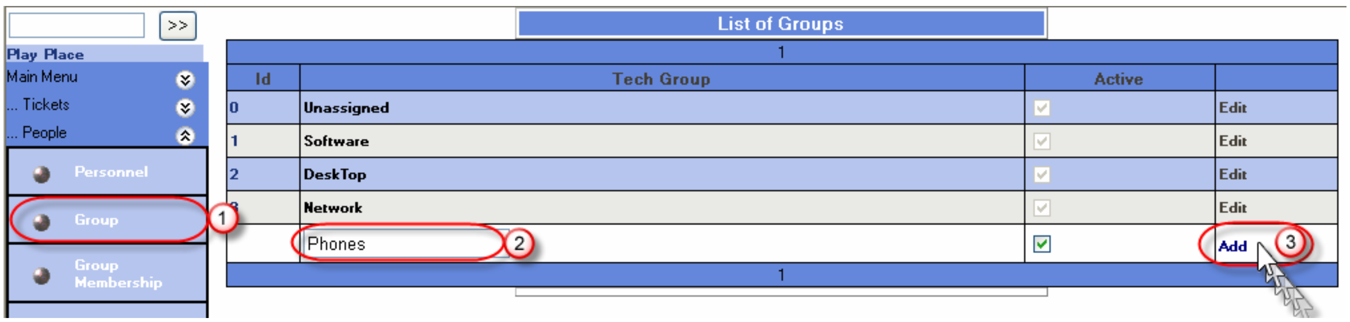
How To Add a new tech group

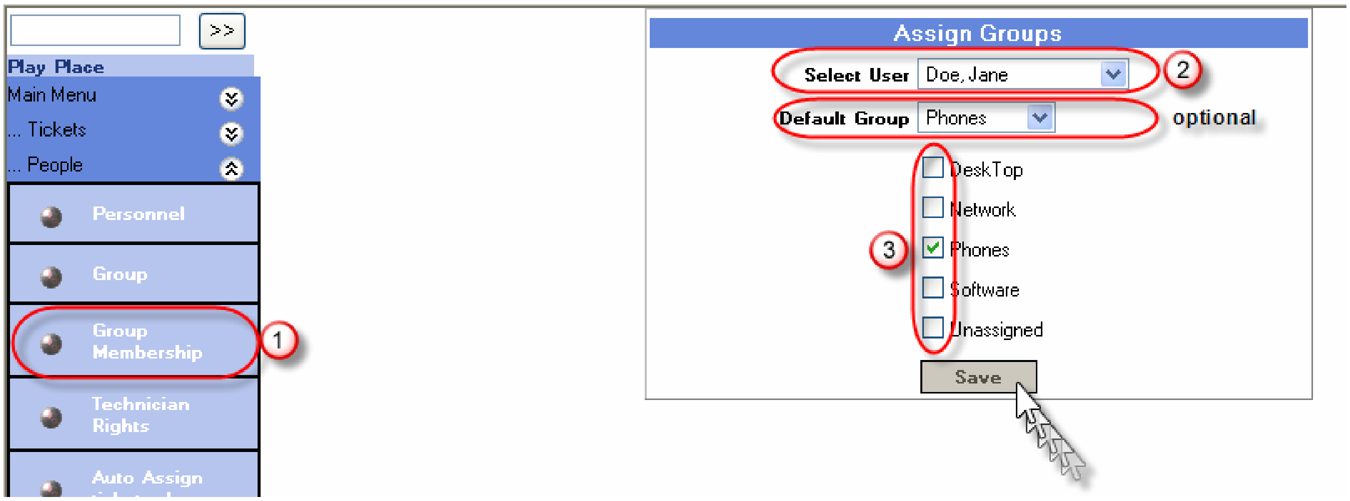
- Login as an administrator
- Select the “People” menu group
- Select the “Group” menu item (1)
- Enter a new group (example “Phones”) (2)
- Click Add (3)



How To Add a technician to a tech group

Groups are important because when the technician logs in, they can see all tickets assigned directly to him AND any ticket assigned to a group he belongs to. For instance you could have a group called "Admin building" and add both the "Admin building" techs to this group. Then when either of the 2 techs login, they see all tickets assigned to the group "Admin building"

- Login as an administrator
- Select the "People" menu group
- Select the "Group Membership" menu item (1)
- Select the tech from the drop down
- Optional, select their default group
- Check all groups that you want then to see tickets for
- Click SAVE!!



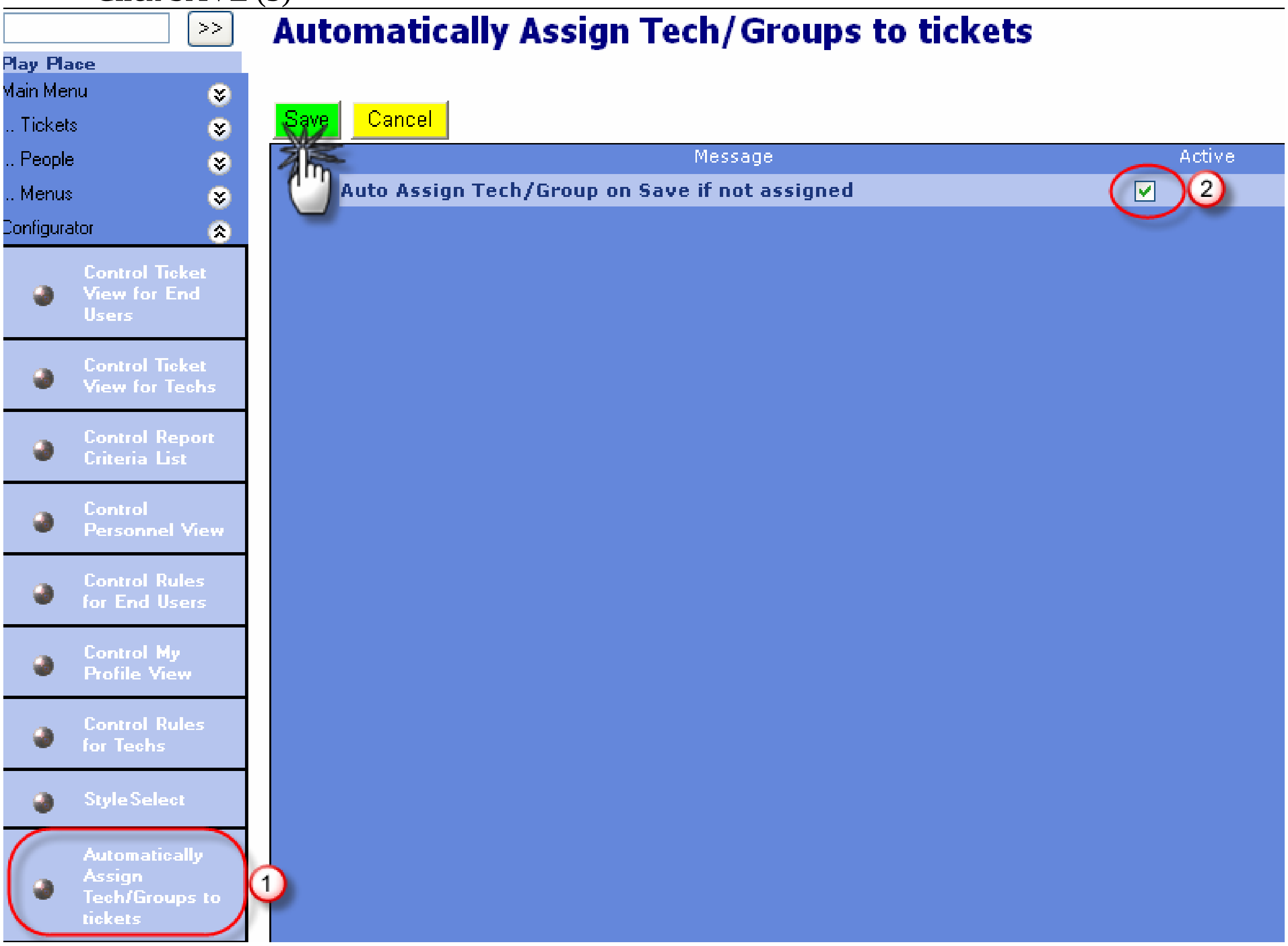
Remember: Once a ticket is assigned to an individual, it is no longer visible to the "group"

How Auto Assign tickets

It is a 2-step process. First you have to turn on the rule to-do the auto assign, and then you have to make the rules.

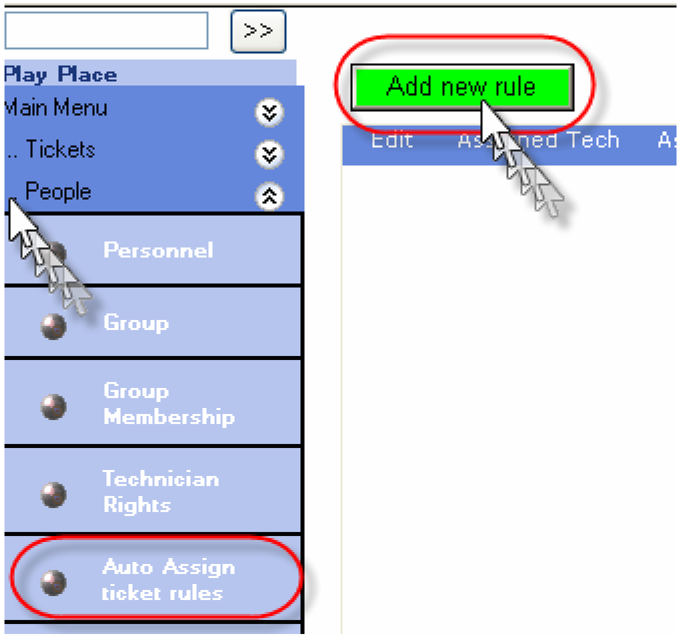
Turn on Auto Assign:

- Login as an administrator
- Select the "Configurator" menu group
- Select the "Automatically assign Tech/Groups to tickets" menu item (1)
- Check the "auto Assign" line item (2)
- Click SAVE (3)

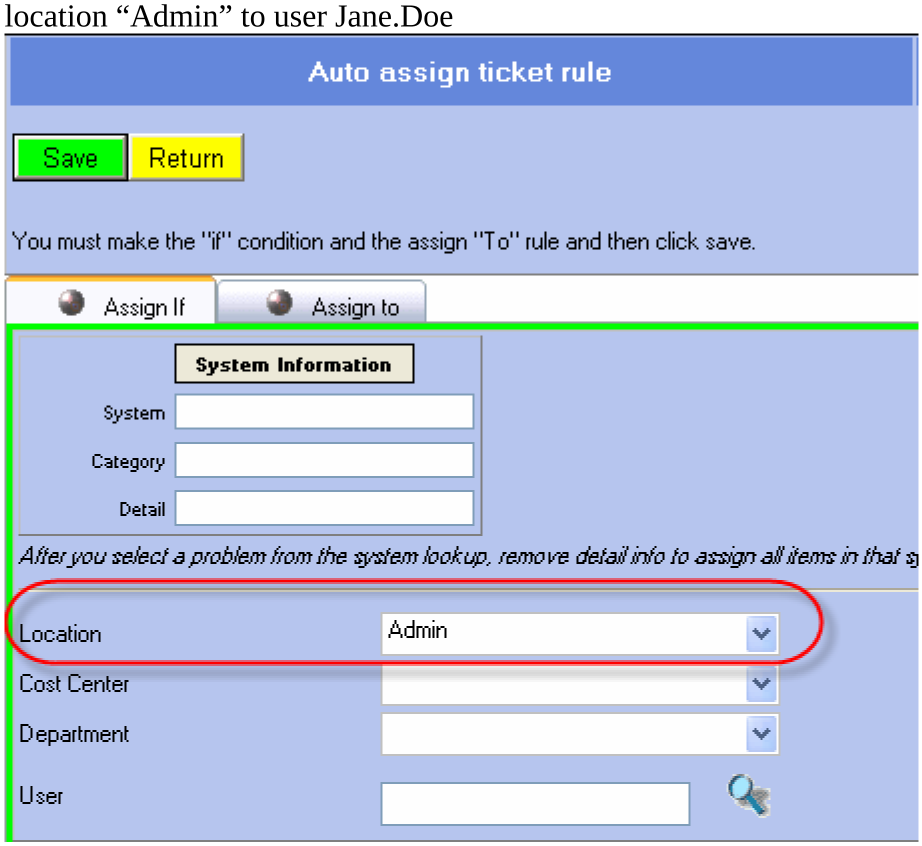


Make the auto-assign Rules:

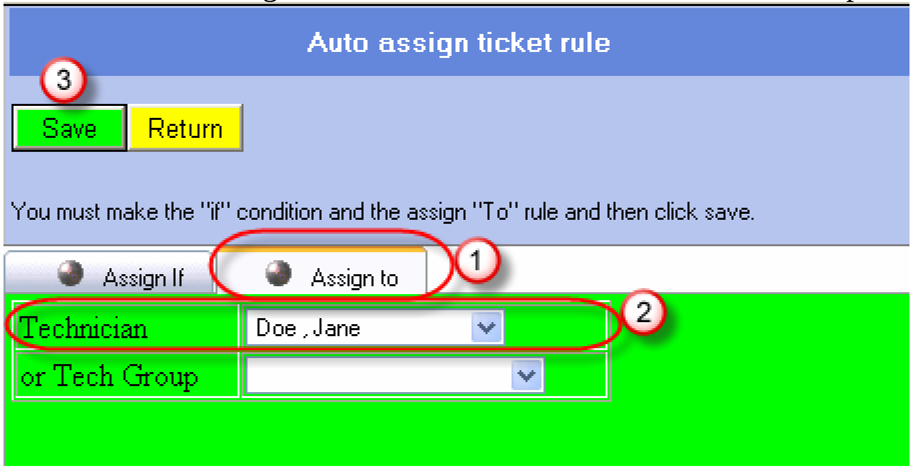
- Login as an administrator
- Select the "People" menu group
- Select "Auto Assign ticket rules"
- Click "Add new rule"



- Then select the "if" condition. For example, lets say we want to assign all tickets that come from location "Admin" to user Jane.Doe



- Now click the “Assign to” tab and select “Jane Doe” from the drop down … and click SAVE!!



-
- Click SAVE and then click RETURN

Final result:

Add new rule

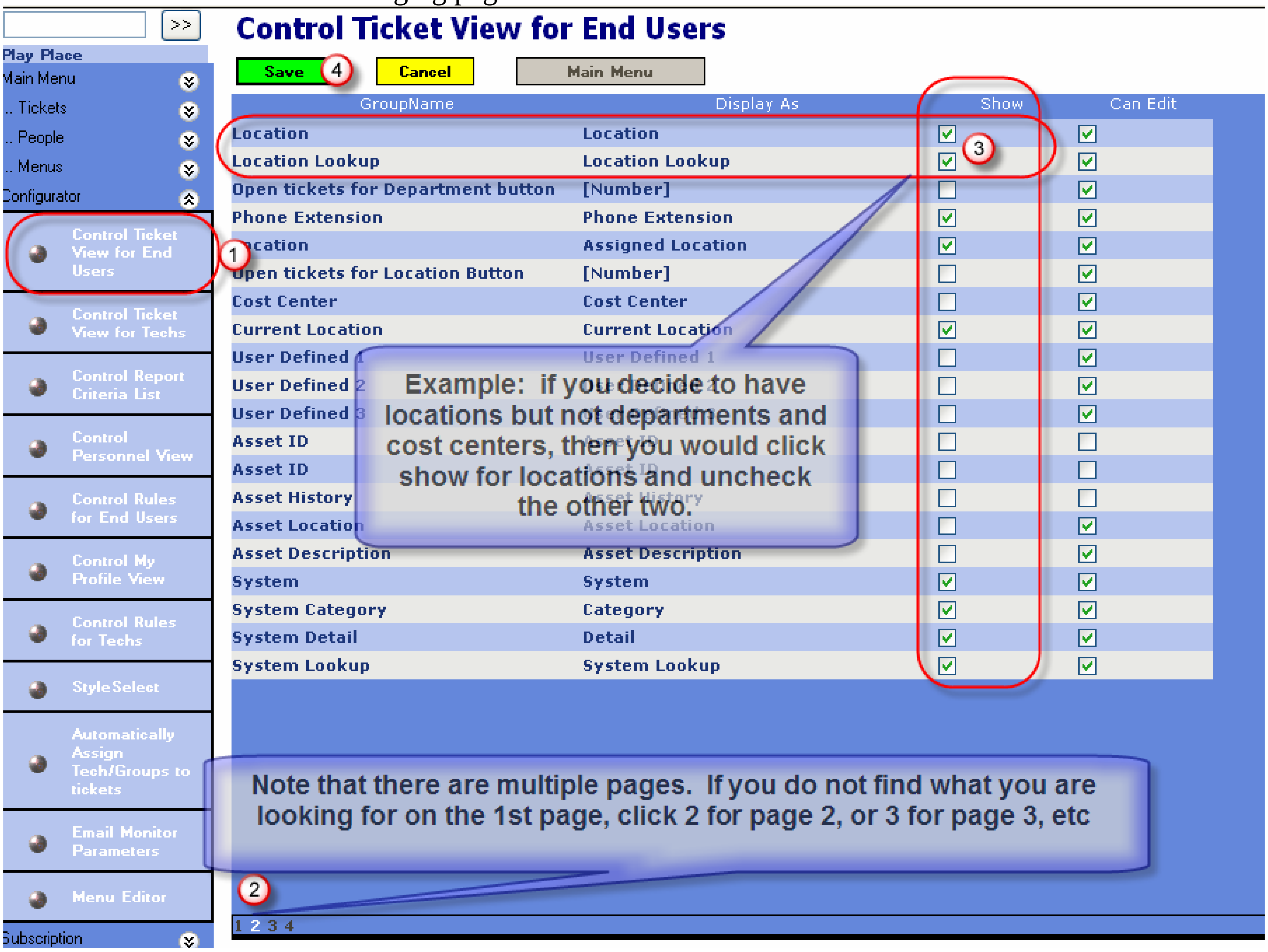
Edit	Assigned Tech	Assigned Group	System	Category	Detail	Location	Department	Cost Center	UserName	UserID	TechID
Edit	Doe, Jane	Phones				Admin					11

Note that because we assigned Jane to “Phones” group as her default hence it is listed here.

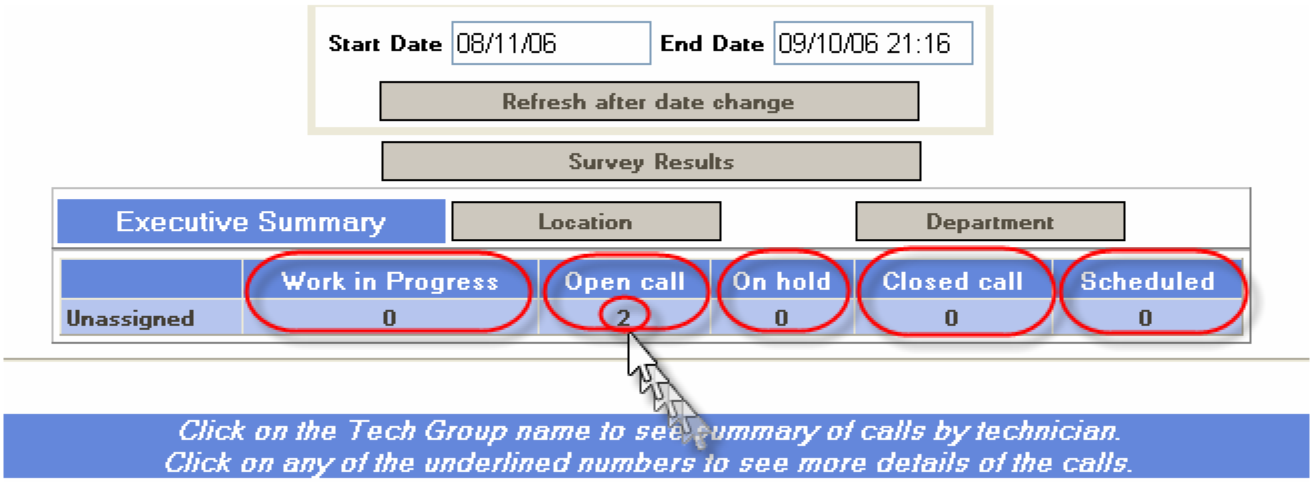
How To add/remove items from the ticket view

There are 3 types of users in the helpdesk system: End users, Techs and Administrators. Techs and Administrators share the same ticket "view". End users have their own "view". You control what each sees based on the multiple page configuration sheets under configurator. The following will show you how to change the view for Users. The same instructions apply to techs, just select "Control tickets View for techs" instead.

- Login as an administrator
- Select the "Configurator" menu group
- Select the "Control Ticket View for End Users" (1)
- Select the page that the item is on (2)
- Check or Un-check the items you want the user to see/not see. (3)
- Click SAVE before changing pages!!!



How To manage tickets



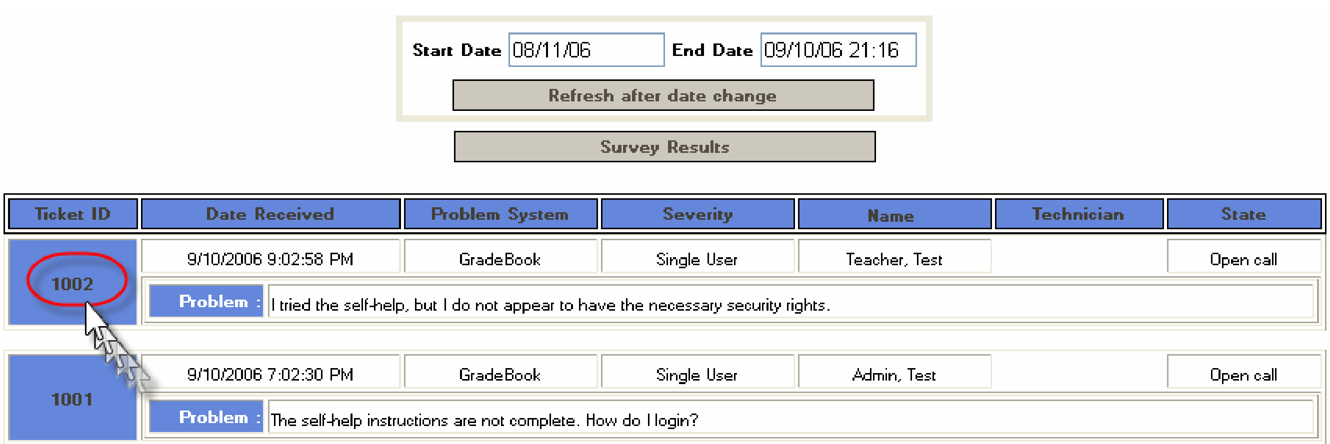
The Management, or “Executive Summary”, gives you, the administrator a bird’s eye view of the status of your helpdesk tickets.

Tickets have 5 states:

- Work in progress
- Open call
- On Hold
- Closed call
- Scheduled

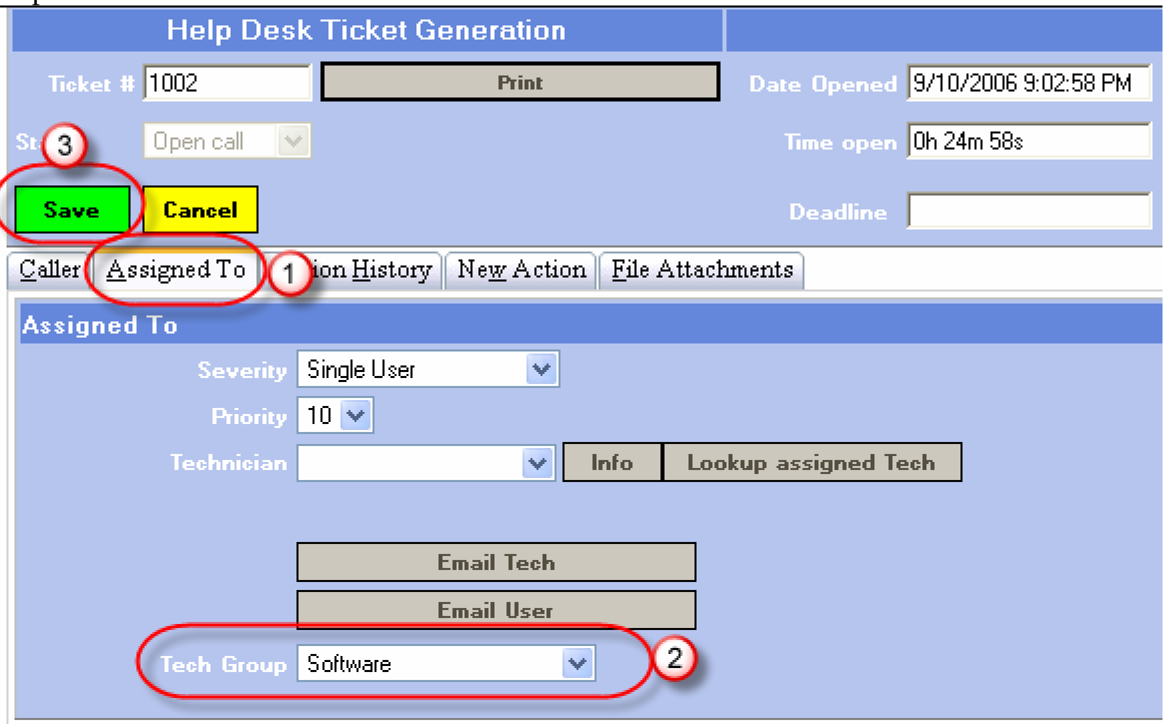
Closed calls only show up if it is between the Start and end date (at the top of the form). All open calls, regardless of date, shows in the list.

The vast majority of your attention will be toward the “Open call” tickets. Depending on your environment, you will typically want to assign all tickets to an appropriate group. For instance, in the above screen shot, we have 2 “Unassigned” tickets in the “Open” queue.
Click the number “2” which will bring you to this screen:

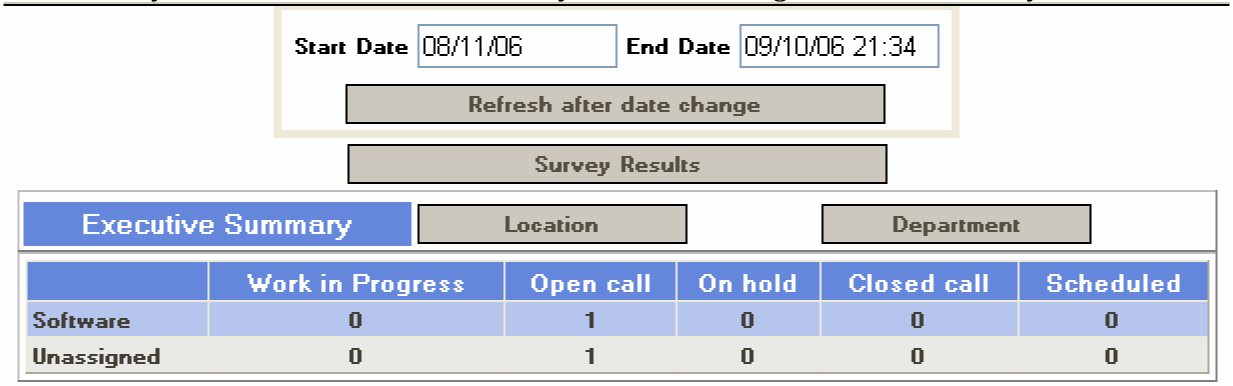


Click ticket # 1002

When the ticket opens, click the “Assigned to” tab and assign it to the software group. Note that you can assign it to individual technician, but then if he if out, no one will see that there is an open ticket. If you assign it to a group, then everyone in that group sees the ticket. But each situation is different so you have the choice. If you do assign it to an individual, then you can send an email or text message to his phone.



Now when you view the executive summary from the Management menu item, you see this:



	Work in Progress	Open call	On hold	Closed call	Scheduled
Software	0	1	0	0	0
Unassigned	0	1	0	0	0

Note you still have 2 tickets, but only 1 is unassigned.

User

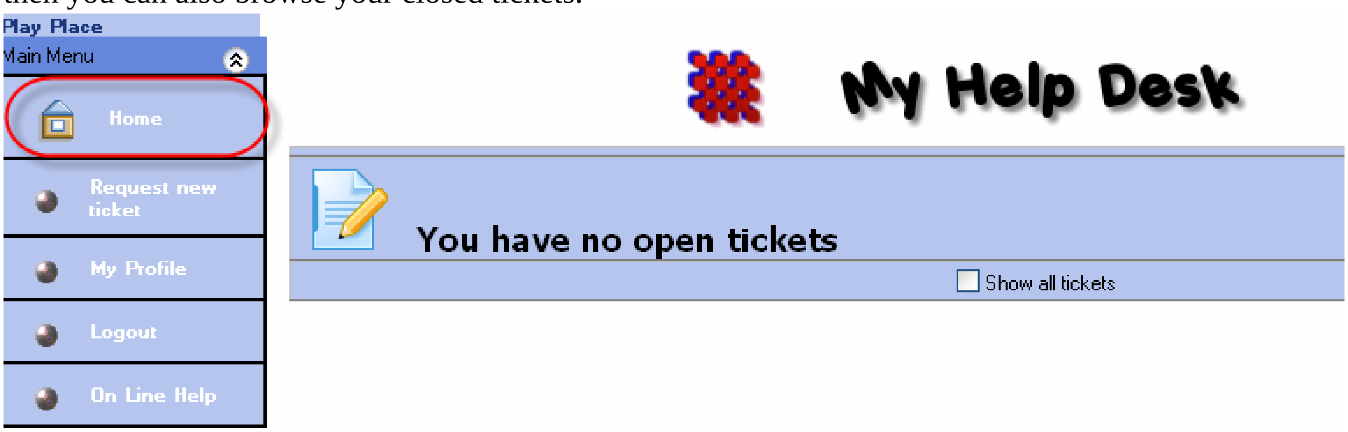
You will be assigned a Login ID and a password for the helpdesk. Although the logo and the button name will be different, the process is the same: enter you login ID and password and click the button.

Depending on your location's configuration, you can see different buttons. But the 3 key ones are:

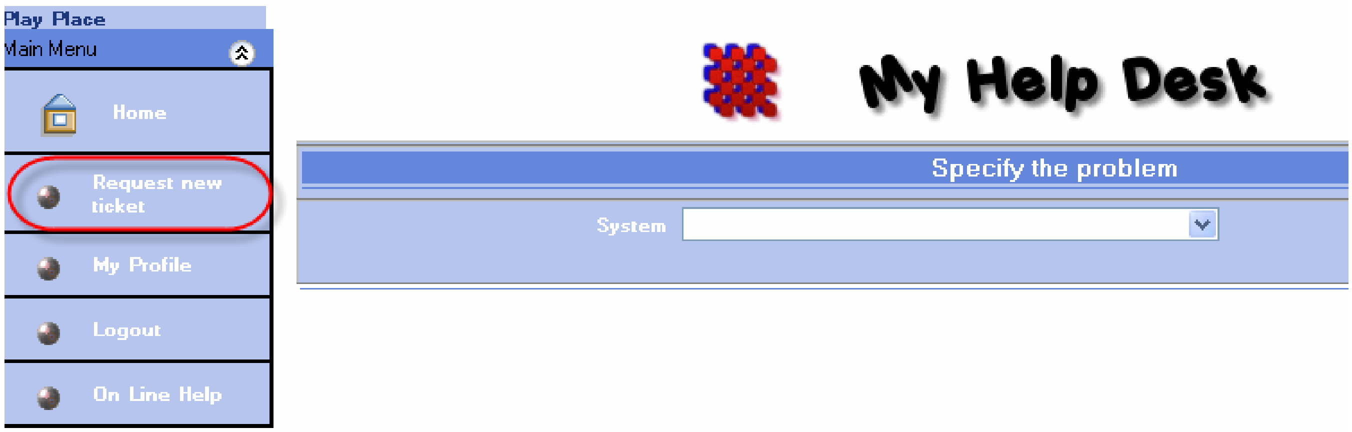
- Home
- Request new ticket
- Logout

Home

This is where you can view the status of all open tickets. If you click the check box "Show all tickets", then you can also browse your closed tickets.

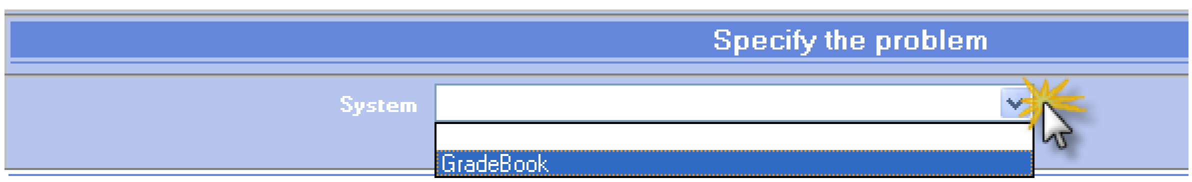


Request new ticket

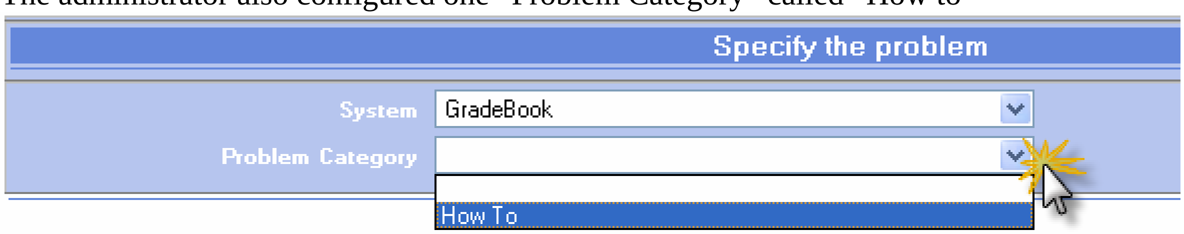


Select the type of problem

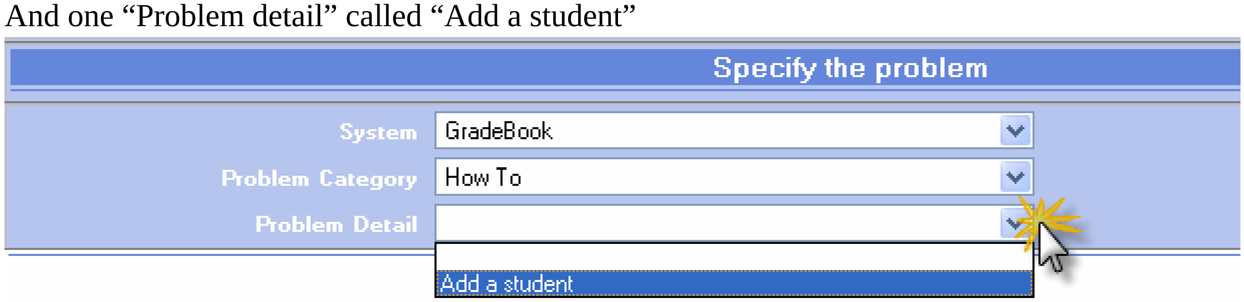
Your options depend on how your administrator configured the three-tiered categories. In an over-simplified example, lets assume your administrator has only setup one type of “system”
Click the drop down arrow and the list is presented for you to select the type of “system” your problem refers to. In this example we only have “GradeBook”



The administrator also configured one “Problem Category” called “How to”



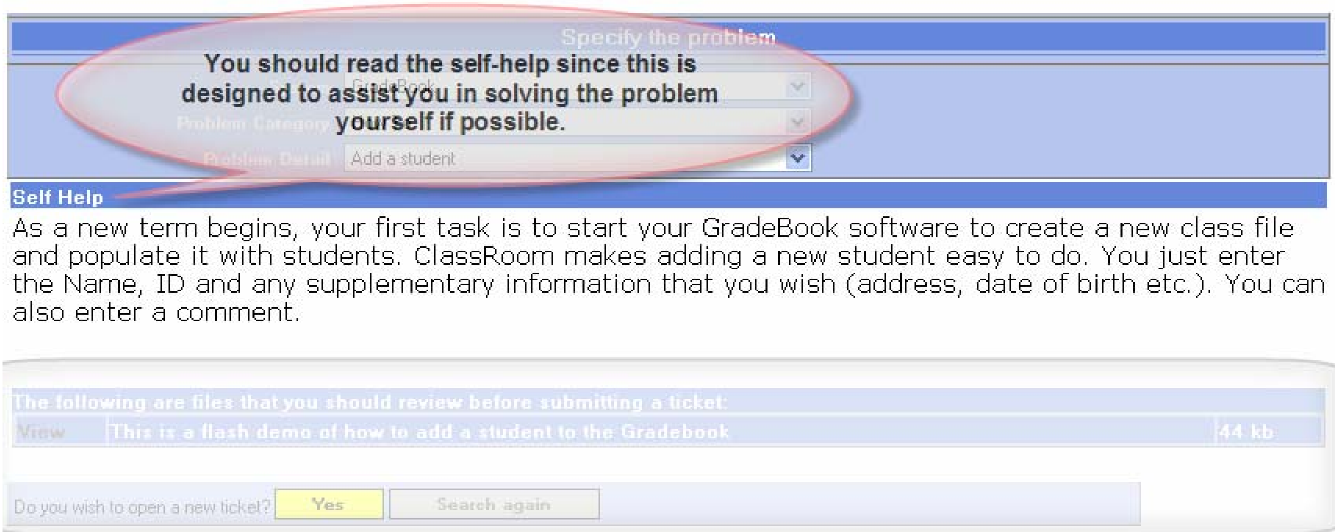
And one “Problem detail” called “Add a student”



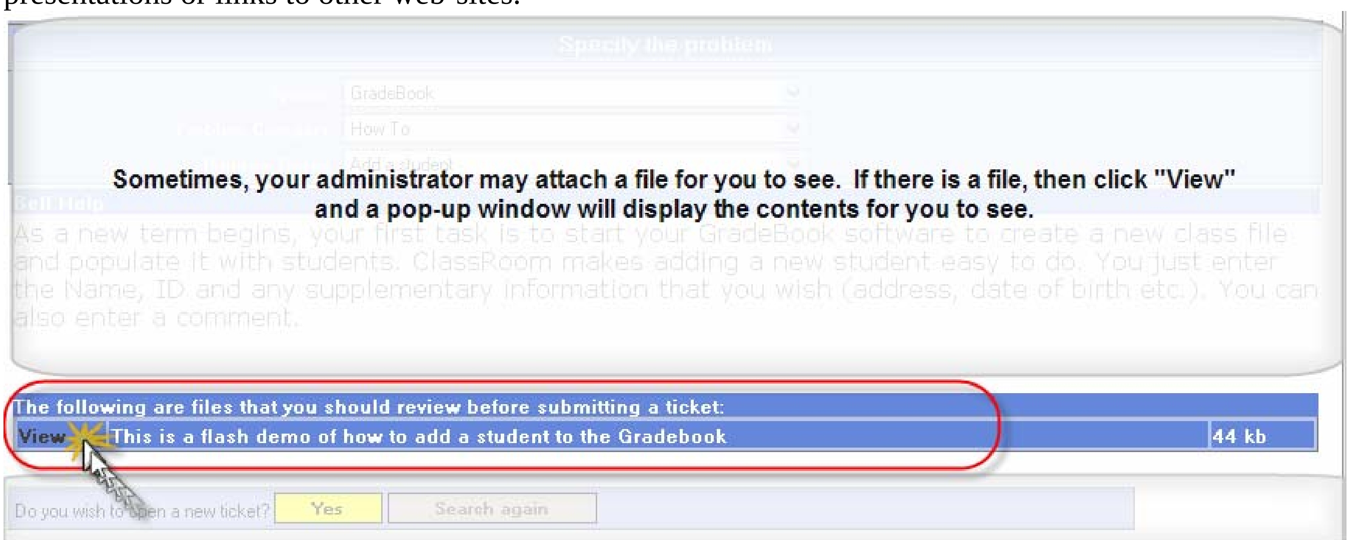
So in summary, you have selected GradeBook->How To->Add a student.

Read and use the Self-help if available

If self-help has been added for this type of problem detail, then you should read and use the instructions as provided.



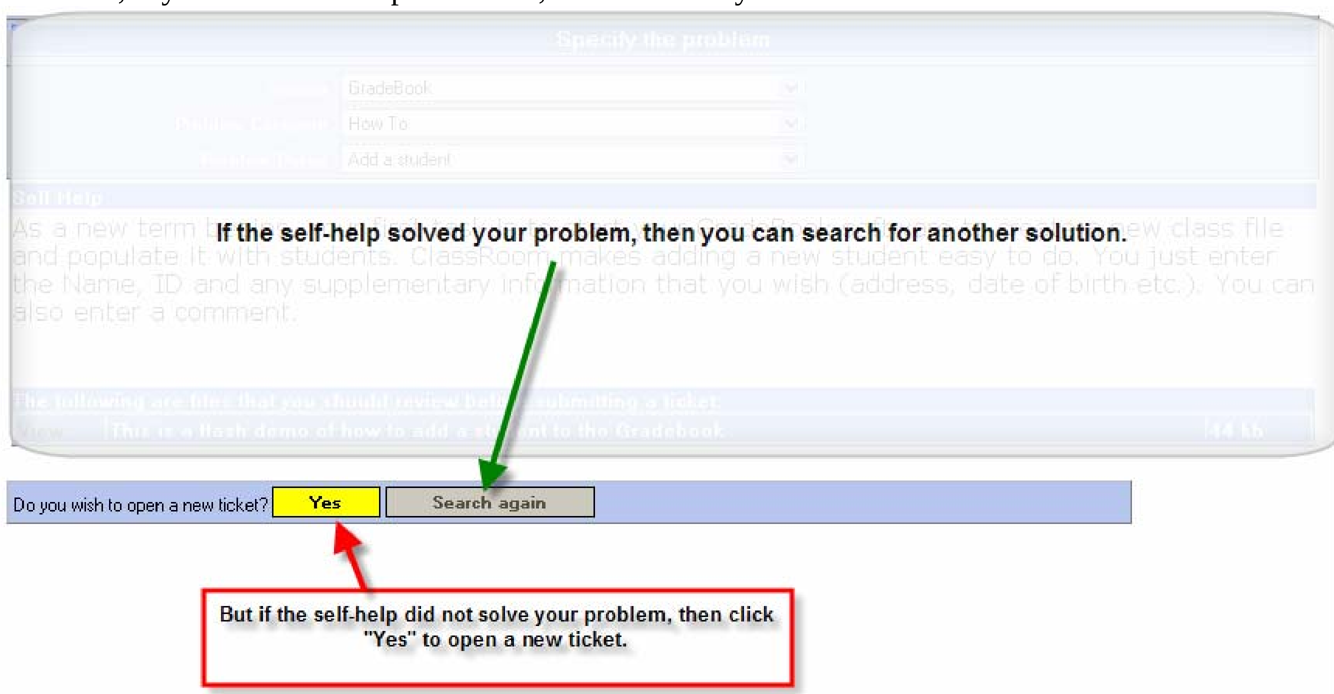
Sometimes, your administrator may attach a file for you to view. These files can be documents, flash presentations or links to other web-sites.



Open a new ticket if required

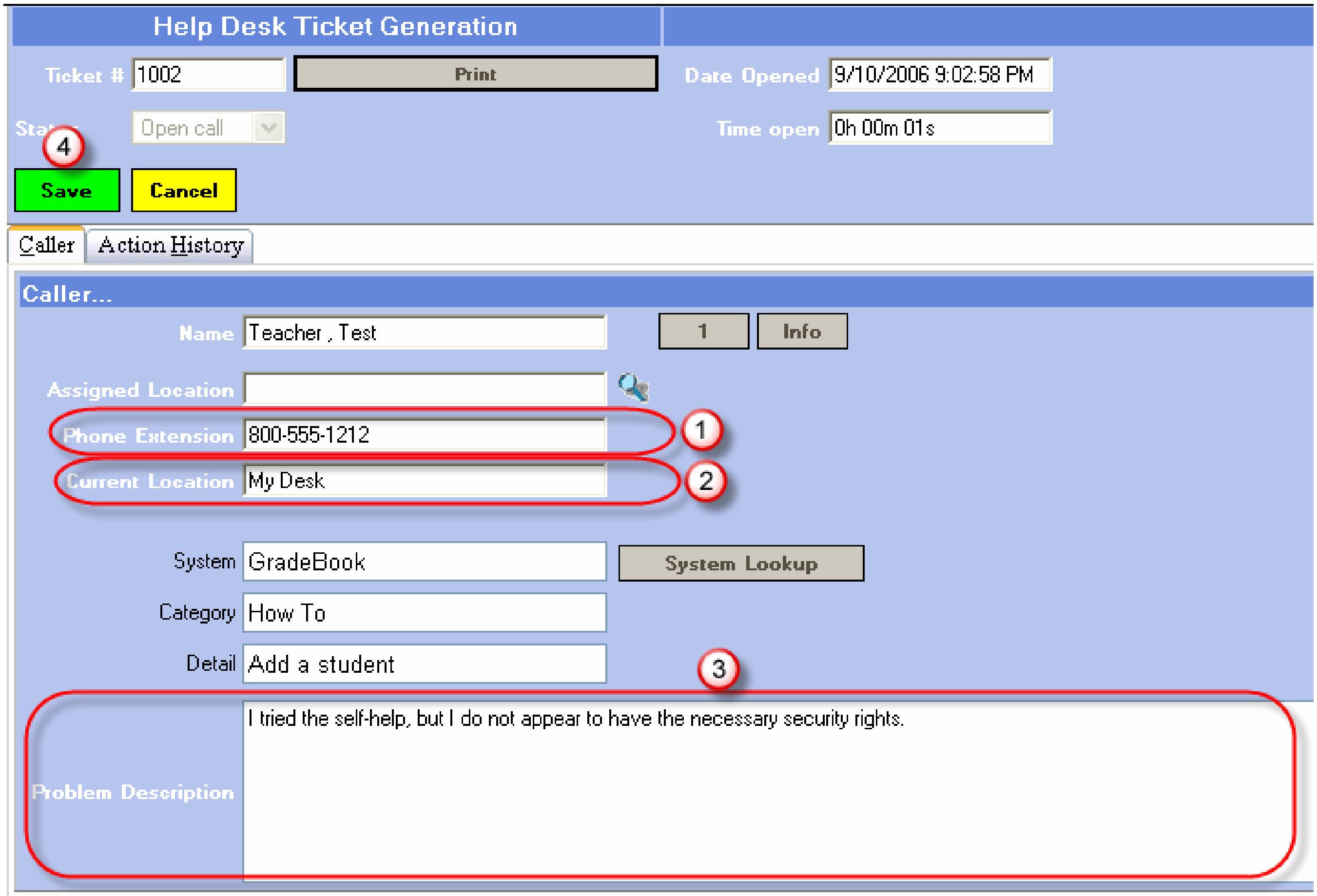
Now you must decide: if the self-help allowed you to solve the problem yourself, then you are finished.

However, if you still need to open a ticket, then click the yellow “Yes”.



Complete the ticket

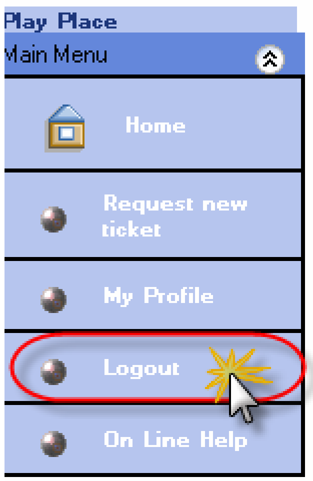
Make sure your telephone and current location are correct and then provide a detailed description of the problem. Statements such as “It’s broke” and “Help” do not provide enough information.



Very important … **click SAVE when done**.

Logout

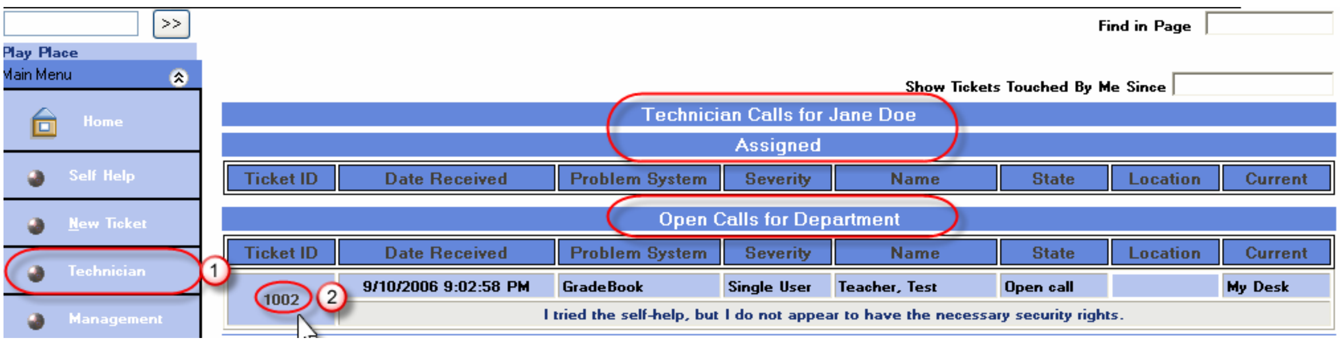
When you are finished, you can logout or simply close your browser.



Technician

Your administrator would have assigned you to a group. When you first login, your default opening page is the technician screen. Here you see only "open" tickets that have been assigned directly to you or tickets that have been assigned to the departments that you belong to.

In this example, there is only one open ticket. There are 2 ways to get a ticket off this list: you or someone must resolve it or the ticket must be assigned to someone else. Please check with your administrator before you do any re-assigning.

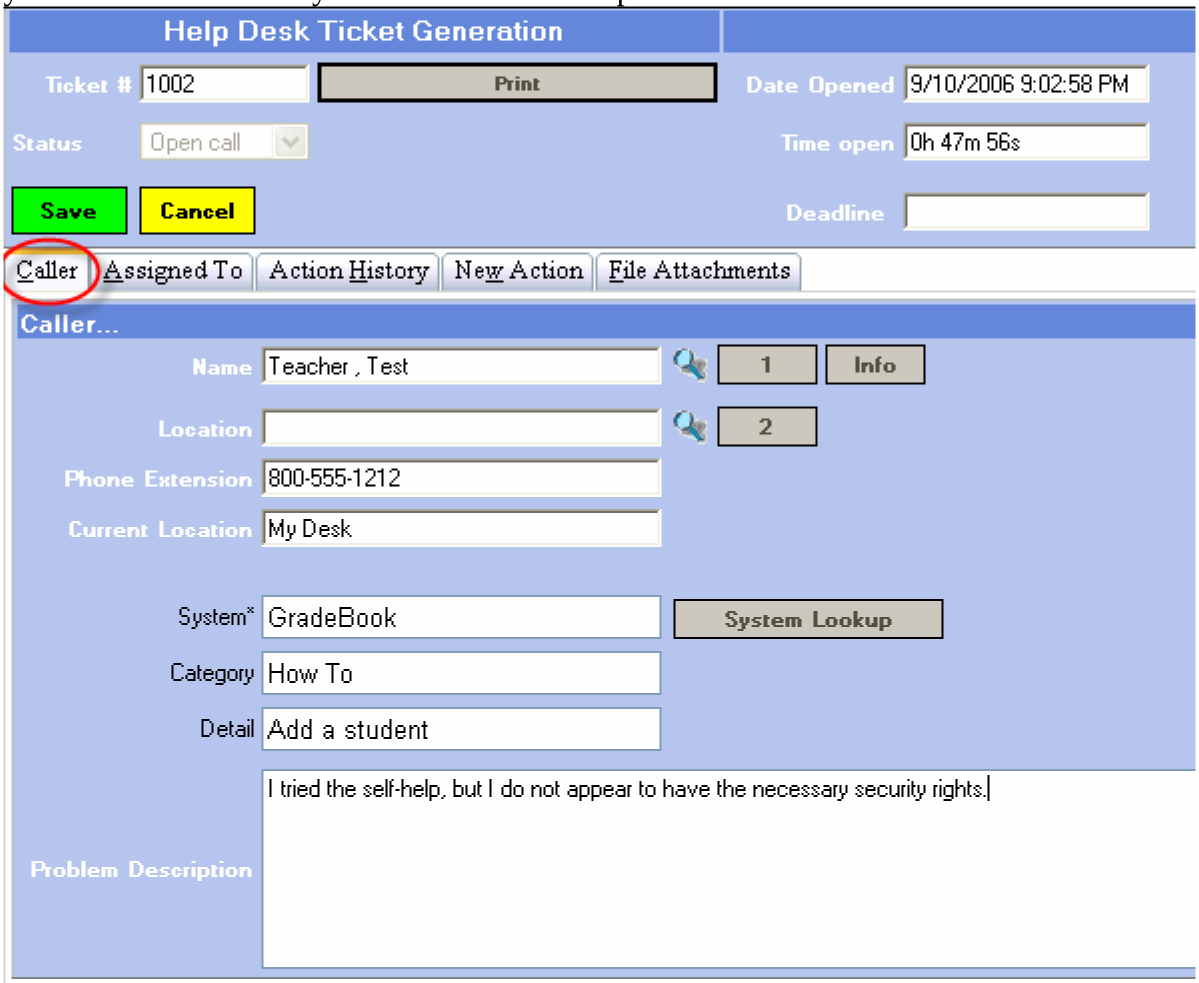


How To update a ticket

First you must select the ticket that you want to work with. Using the example from above, click the ticket number (in this example it is ticket 1002).

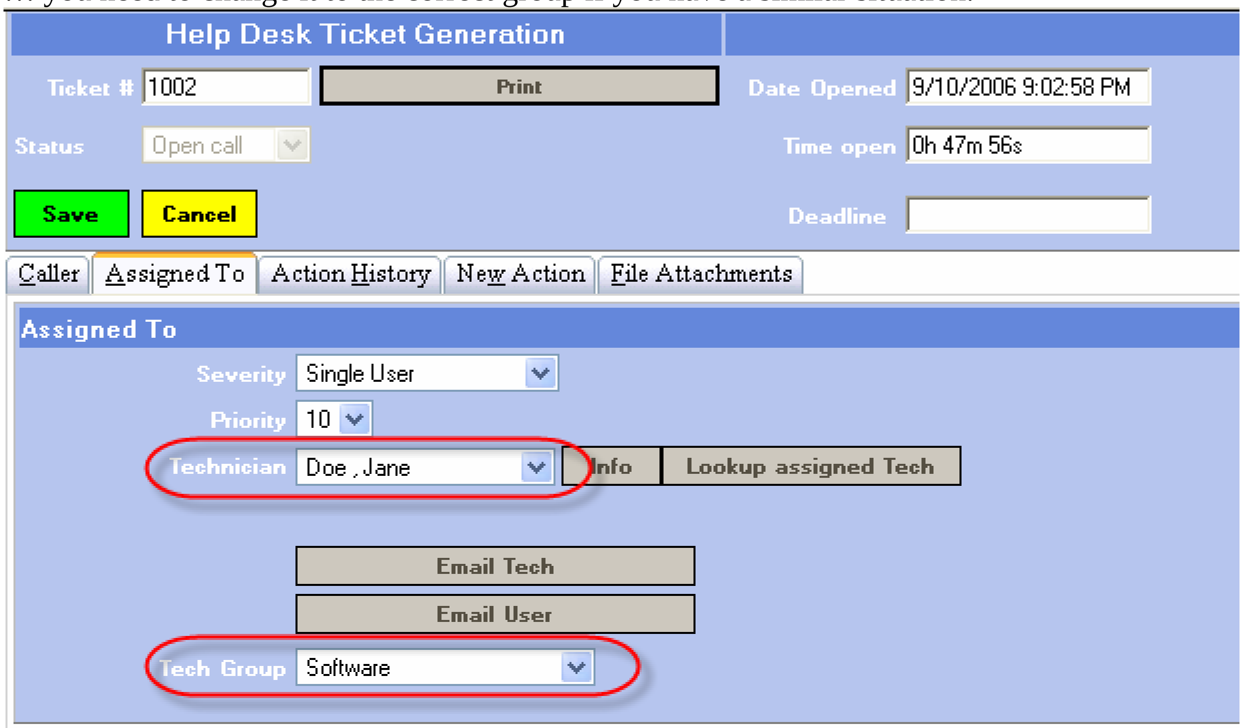
Caller tab:

This is normally completed by the user and has his contact info and hopefully enough information for you to know what tools you need to resolve the problem.



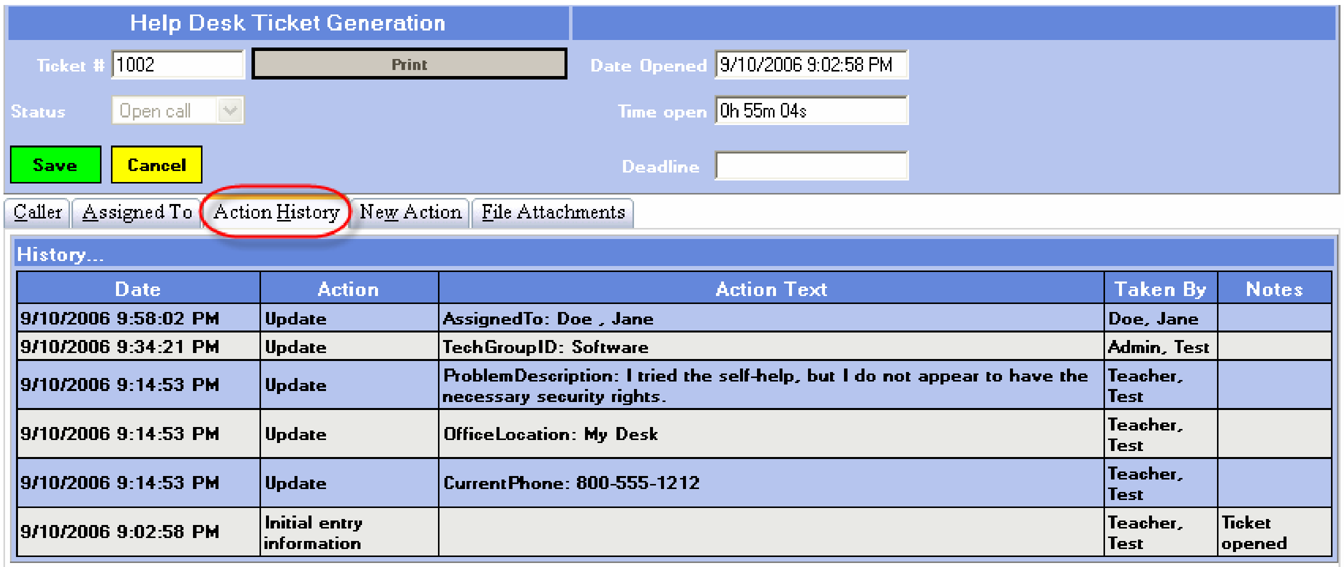
Assigned to Tab:

This is where you take ownership of the ticket. Make sure however that the tech group is the correct one. In this example, Jane Doe's belongs to both the software and phones group, but her default group is phones. So when Jane is selected from the drop down, it automatically changes the group to Phones … you need to change it to the correct group if you have a similar situation.



Action History tab:

You can perform no functions on this tab, but this shows you any changes done on the ticket and who did it. (Note that you have to click the green SAVE before it actually shows up here)


Help Desk Ticket Generation

Ticket # 1002 Print

Date Opened 9/10/2006 9:02:58 PM

Status Open call

Time open 0h 55m 04s

Save Cancel

Deadline

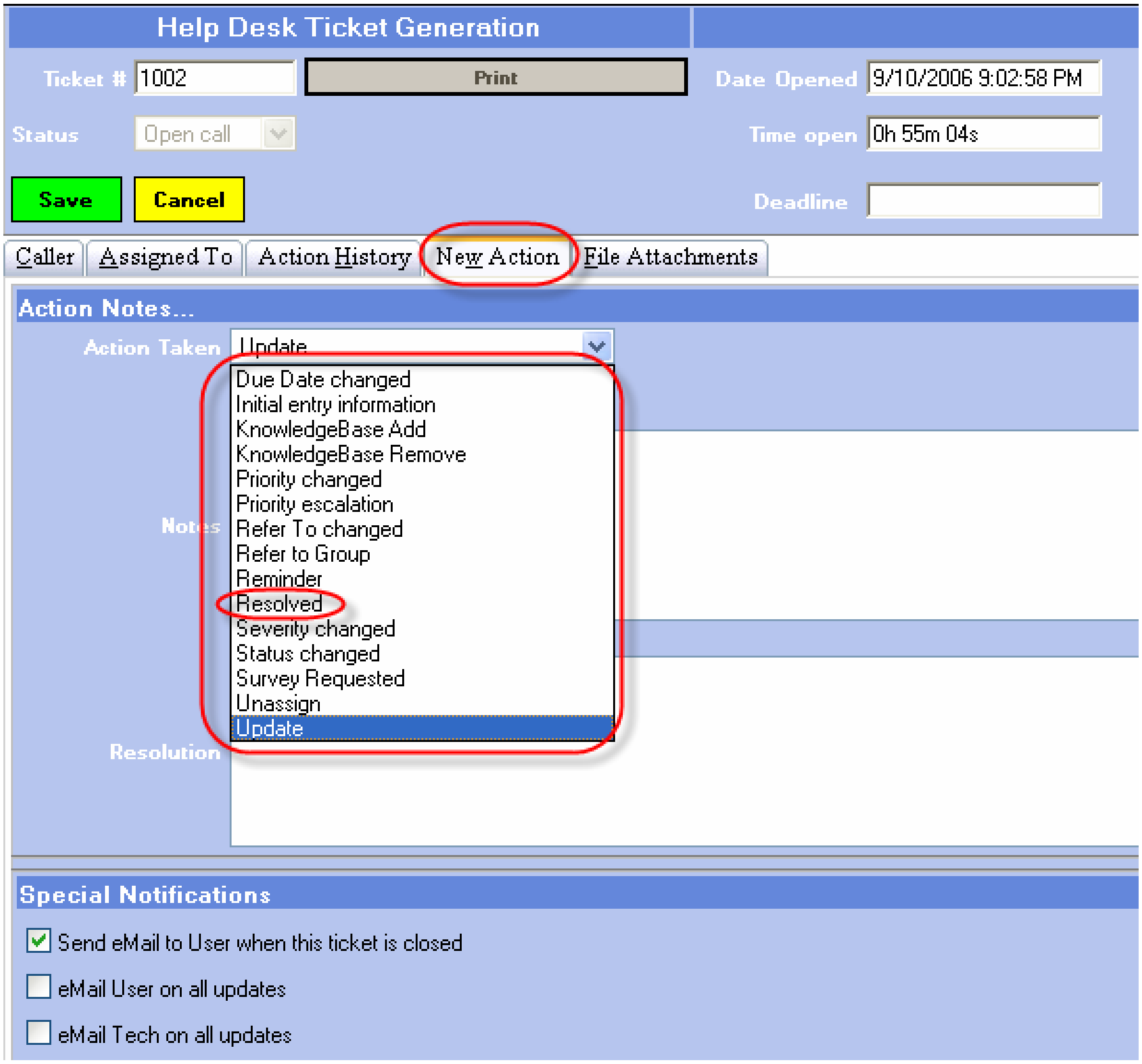
Caller | Assigned To | Action History | New Action | File Attachments

History...

Date	Action	Action Text	Taken By	Notes
9/10/2006 9:58:02 PM	Update	AssignedTo: Doe , Jane	Doe, Jane	
9/10/2006 9:34:21 PM	Update	TechGroupID: Software	Admin, Test	
9/10/2006 9:14:53 PM	Update	ProblemDescription: I tried the self-help, but I do not appear to have the necessary security rights.	Teacher, Test	
9/10/2006 9:14:53 PM	Update	OfficeLocation: My Desk	Teacher, Test	
9/10/2006 9:14:53 PM	Update	CurrentPhone: 800-555-1212	Teacher, Test	
9/10/2006 9:02:58 PM	Initial entry information		Teacher, Test	Ticket opened

New Action

This is where you perform most of your actions on a ticket:
See the screen print for the list of actions, but 90% of the things you do will be either "update" or "Resolved"



- If you select **update** from the action taken drop down, then you should add a description in the "Notes" section.
- If you select **resolved** from the list, you must include a description in the "Resolution" section. *You should make extra effort to include very detailed resolution information for those unique one off problems … because when it happens again, you can do a search for how you fixed it the last time*

Make sure to click **"Save"** when done.

Self-Serve

Self-help OR Self-serve: we have a feature that allows your users to submit tickets by email. The helpdesk was originally designed to be self-help driven. But we have found some prefer a self-serve instead. To do this, your users simply send an email to a special email account that you setup. You then run a scheduled task every 1 to 5 minutes that checks this special email account and adds the user (if new) and the ticket to the database and then sends an email to the user with a password and instructions to update their profile. This is easy on every-one but you do loose the self-help feature since the users can (but do not have to) submit tickets by email. To set this up you 1) must have an email account dedicated to this 2) do the program configuration settings and 3) Configure a scheduled task on the server.

Setup a dedicated email account

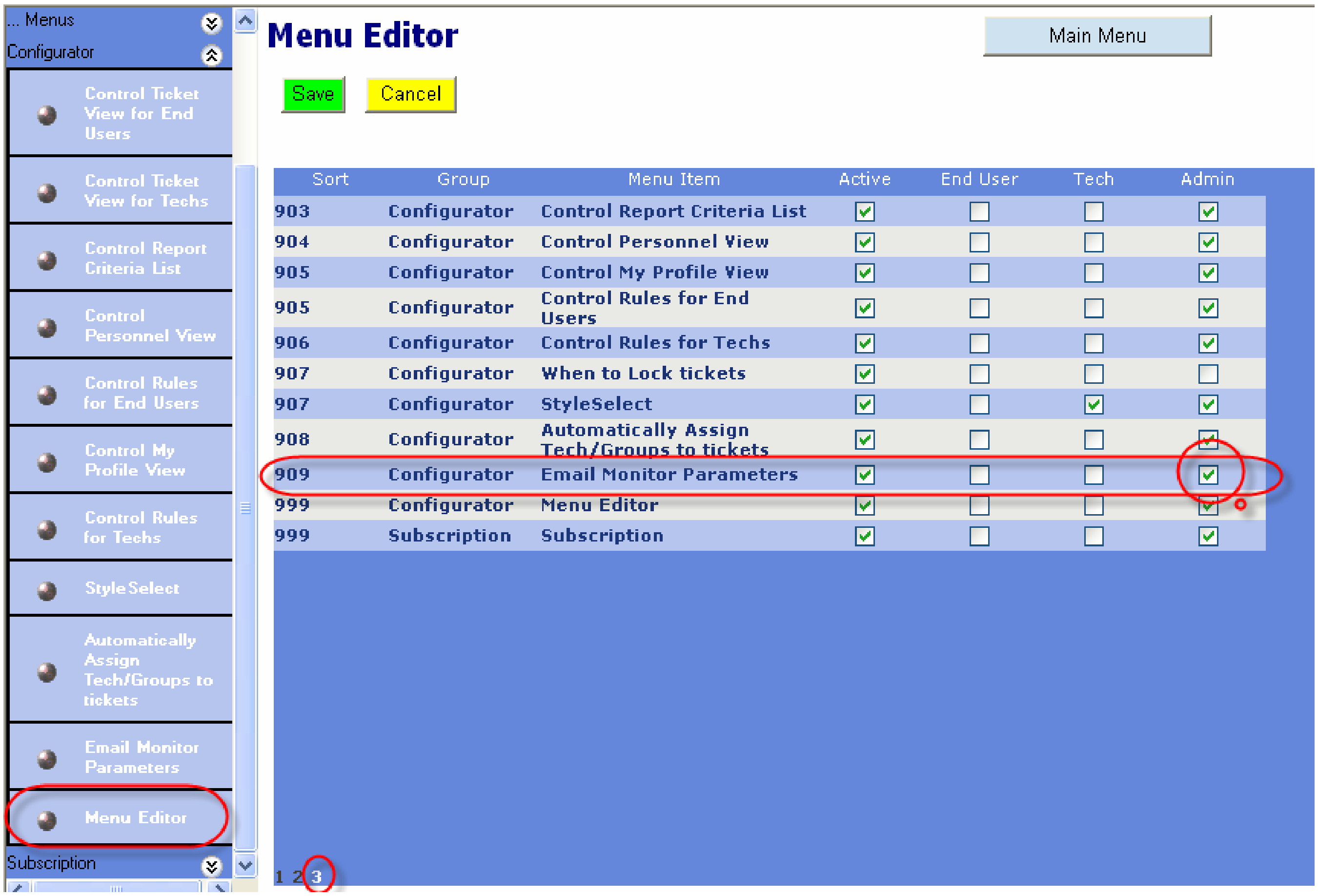
We recommend something like EmailHelp@YourDomain.com. Any emails received into this account are processed and deleted by simple POP3 protocol.

Program configurations

This is a two-step process. You need to add the menu items for the administrator and then you have to change the parameters

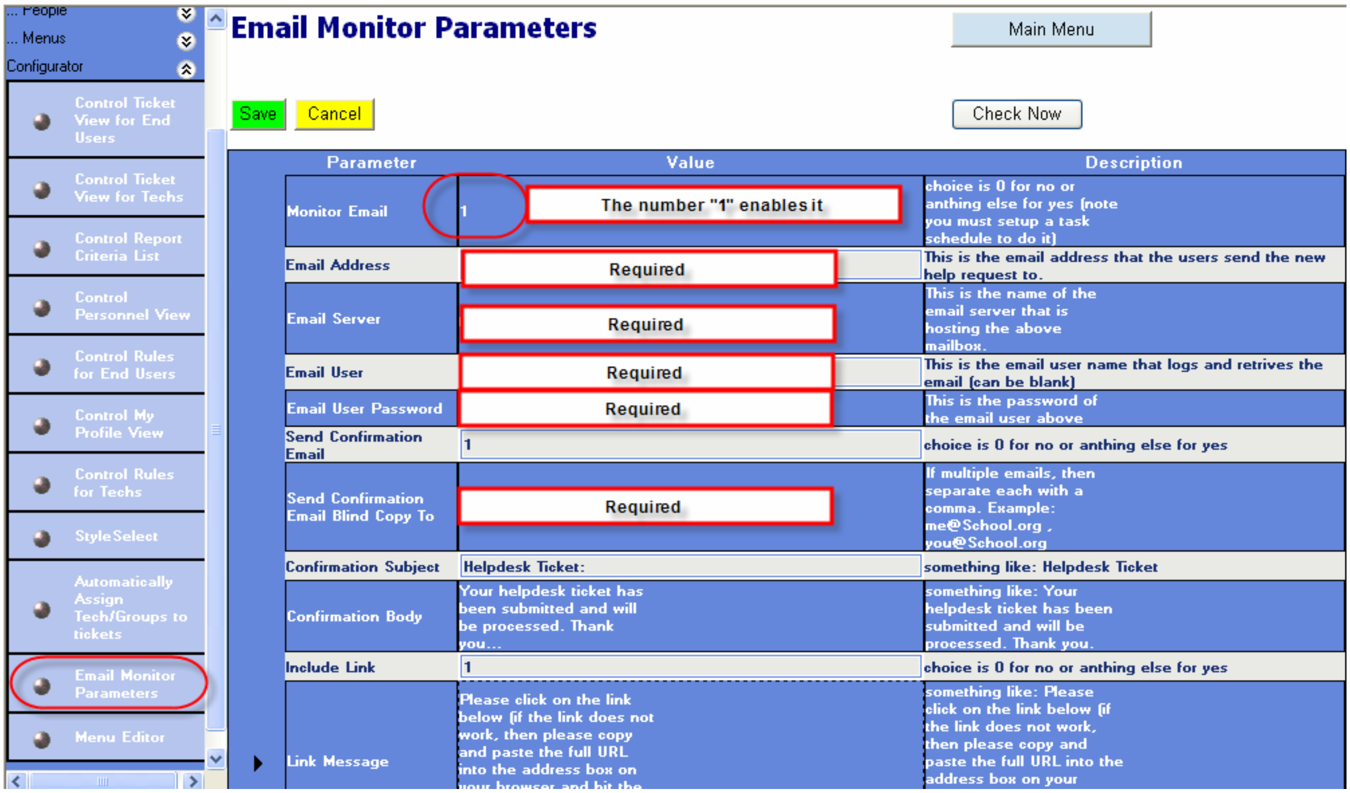
Add menu items

- Login as an administrator
- Select the “Configurator” menu group
- Select the “Menu Editor” menu item
- Select the page that the item (3)
- Check the mark for admin for “Email Monitor Parameters”
- Click SAVE!!!



Change parameters

- Login as an administrator
- Select the “Configurator” menu group
- Select the “Email Monitor Parameters” menu item
- Select the page that the item (3)
- Check the mark for admin for “Email Monitor Parameters”
- Click SAVE!!!

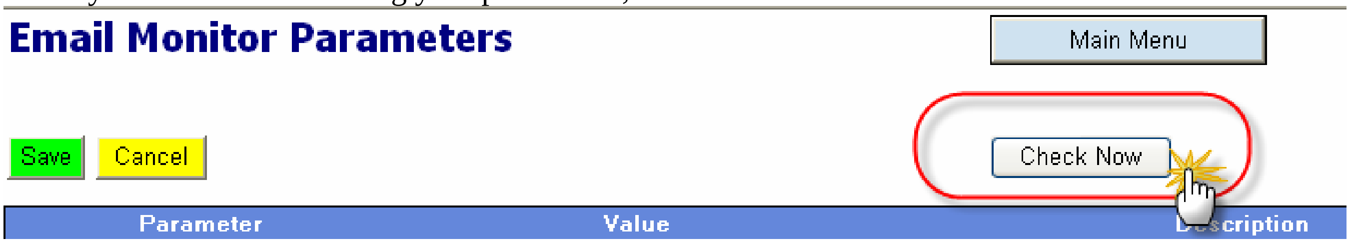


All parameters:

Parameter	Default Value	Description
Monitor Email	0	Choice is 0 for no or anything else for yes (note you must setup a task schedule to do it)
Email Address		This is the email address that the users send the new help request to.
Email Server		This is the name of the email server that is hosting the above mailbox.
Email User		This is the email user name that logs and retrieves the email (can be blank)
Email User Password		This is the password of the email user above
Send Confirmation Email	1	Choice is 0 for no or anything else for yes
Send Confirmation Email Blind Copy To		If multiple emails, then separate each with a comma. Example: me@MyCompany.org , you@ MyCompany.org
Confirmation Subject	Helpdesk Ticket:	Something like: Helpdesk Ticket
Confirmation Body	Your helpdesk ticket has been submitted and will be processed. Thank you.	Something like: Your helpdesk ticket has been submitted and will be processed. Thank you.
Include Link	1	Choice is 0 for no or anything else for yes
Link Message	Please click on the link below (if the link does not work, then please copy and paste the full URL into the address box on your browser and hit the [Enter] key on your keyboard):	Something like: Please click on the link below (if the link does not work, then please copy and paste the full URL into the address box on your browser and hit the [Enter] key on your keyboard).
Include Random Password If New User	1	Choice is 0 for no or anything else for yes
New User Password Message	Below is your username and password required to login and maintain your profile:	Something like: Below is your username and password required to login and maintain your profile.
Include Password Request Link	1	Choice is 0 for no or anything else for yes
Password Request Message	Click here to request your password.	Something like: Click here to request your password.
Allow Attachments	1	Choice is 0 for no or anything else for yes

Test it:

When you have finished saving your parameters, click the "Check Now" to test it:



Configure schedule task

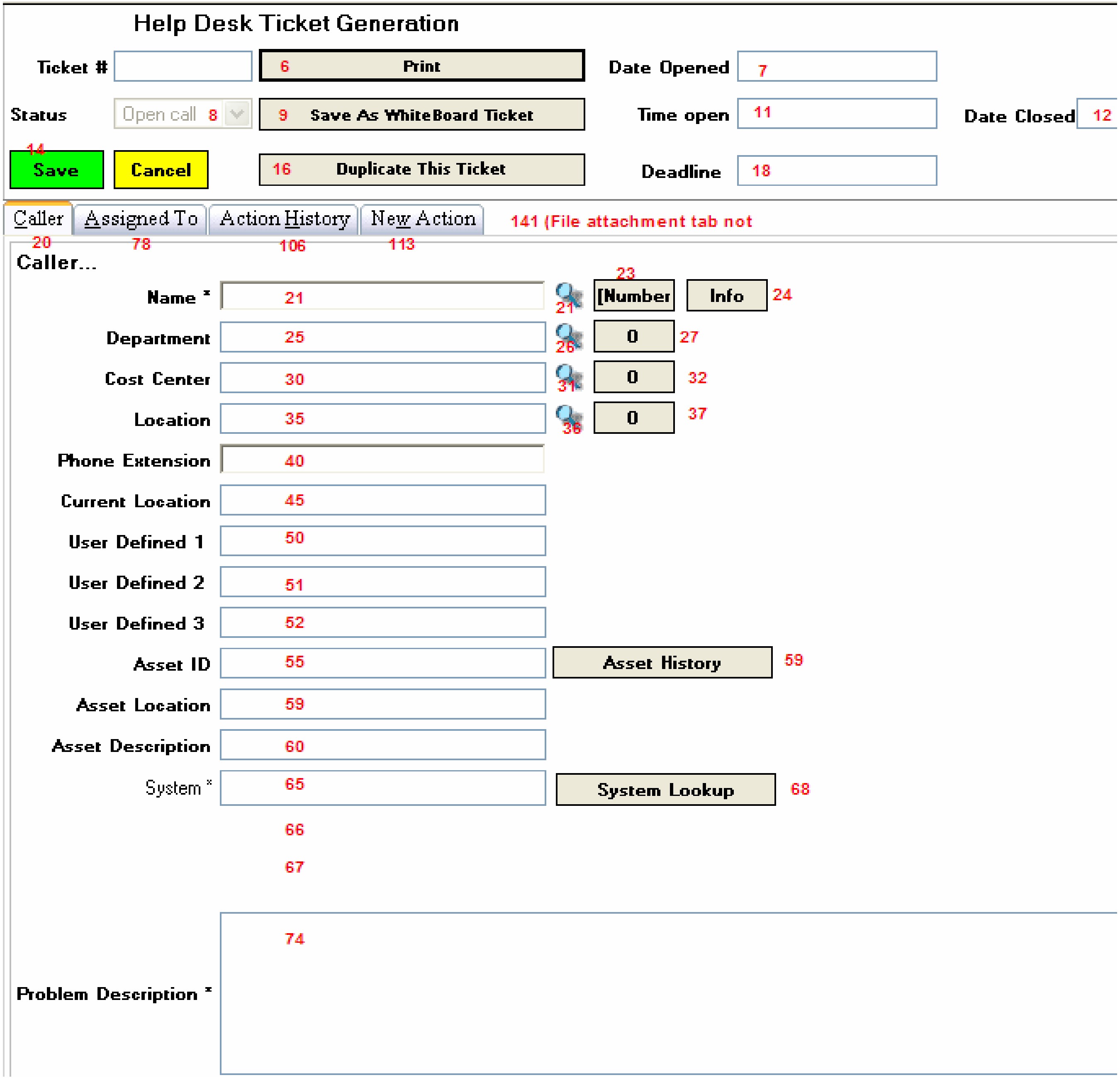
- From the web server
- Create a new Task Schedule
- Click till you can BROWSE to
    - *(After you have tested it, it gives the path you need to browse to)*
    - Something like c:\inetpub\wwwroot\Helpdesk\bin\EmailMonitor.exe
- 'Check' perform the task daily
- Pick a start time (6:00am)
- Provide an local administrator login ID and password
- 'Check' open advanced properties
- In the properties window, click the 'Schedule' tab
- Click advanced
- Click repeat task
- Change the 'every time' (to something like every 5 minutes)
- Change 'duration' from 1 hour to 24 hours (that way it checks around the clock).

Control Ticket view

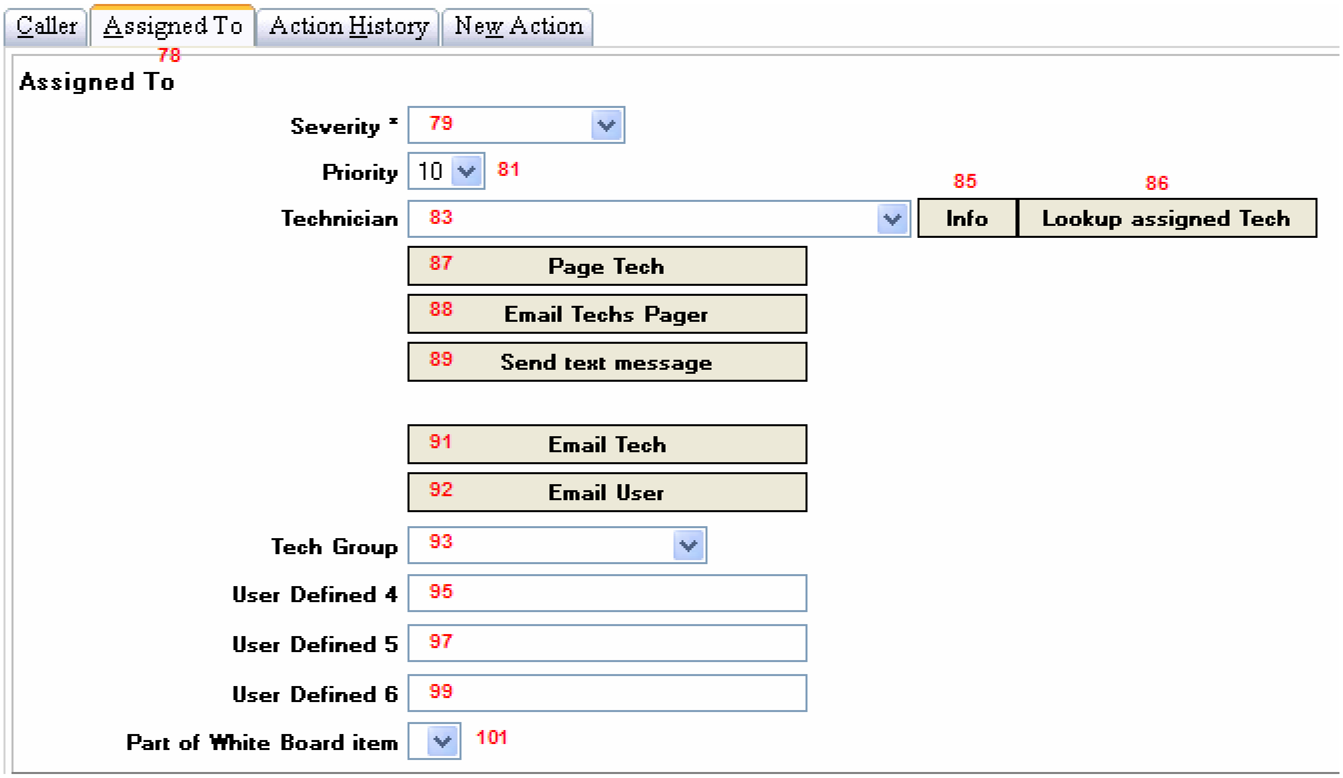
The red letters on the following screen shots show the ID of the control that you can turn on or off. See below the screen shots for a listing of the name of that control.

- Login as an administrator
- Select the “Configurator” menu group
- Select either “Control Ticket View for End Users” or “Techs view”
- Note that you can also change the label name. For instance: if you wanted to collect info for what anti-virus program was installed on the computer, you could change “User Defined 1” label to “Anti-Virus program” and then display it to either the tech or the user or both

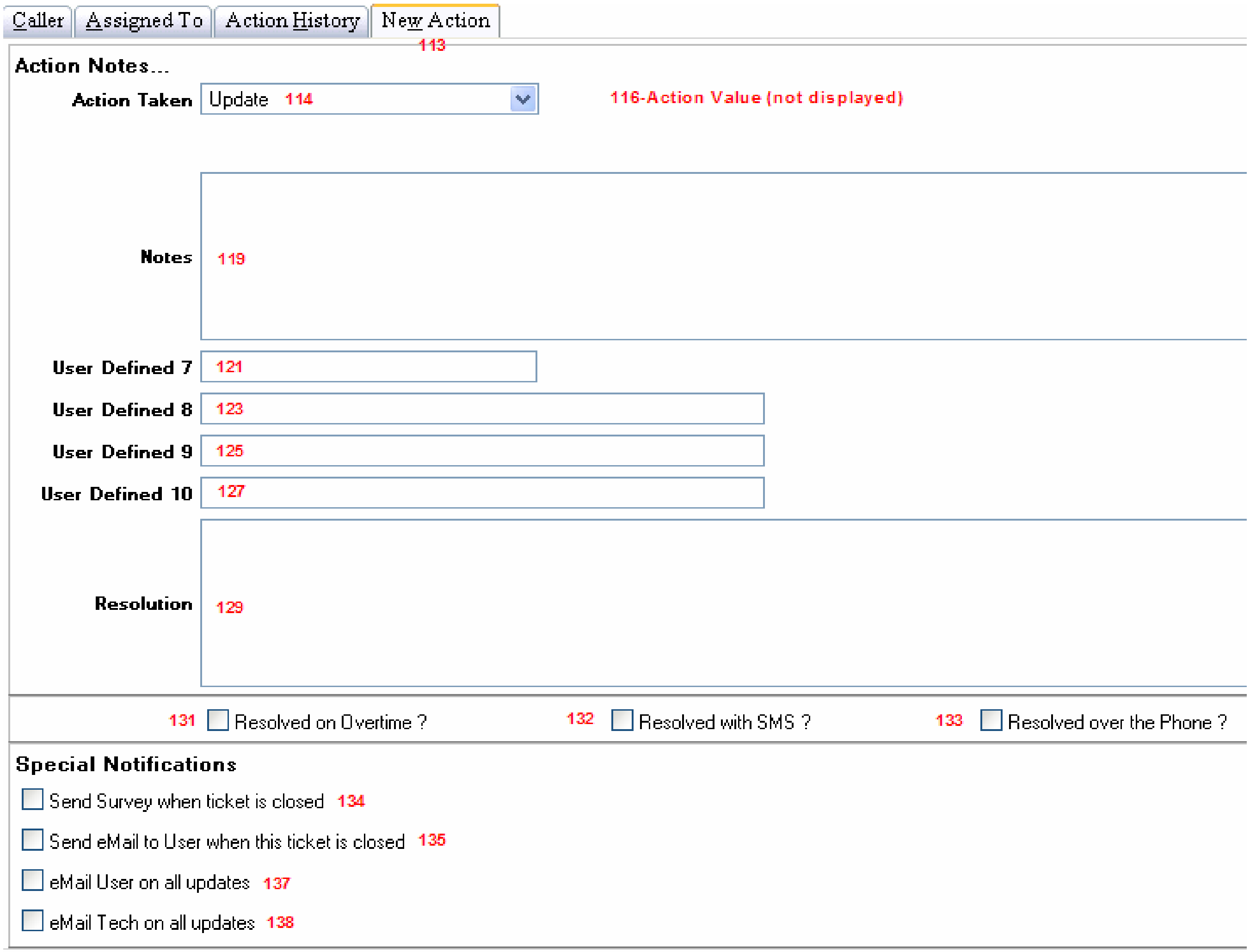
Header and Caller tab



Assigned To Tab



New Action Tab



Control Names and IDs

ID	Group Name	Label Name
	Header information	
6	Print	Print
7	Date Opened	Date Opened
8	Status	Status
9	Save As WhiteBoard Ticket	Save As WhiteBoard Ticket
11	Time open	Time open
12	Date Closed	Date Closed
13	Remove WhiteBoard Ticket	Remove WhiteBoard Ticket
14	Save	Save
16	Duplicate This Ticket	Duplicate This Ticket
18	Deadline	Deadline
20	Caller Tab	Caller
21	Caller Name	Name *
22	Caller Name Lookup	Caller Name Lookup
23	Caller Name Lookup Button	[Number]
24	Caller Info Button	Info
25	Department	Department
26	Department Lookup	Department Lookup
27	Ticket open for Department Button	[Number]
30	Cost Center	Cost Center
31	Cost Center Lookup	Cost Center Lookup
32	Cost Center Count	[Number]
35	Location	Location
36	Location Lookup	Location Lookup
37	Ticket open for Location button	[Number]
40	Phone Extension	Phone Extension
45	Current Location	Current Location
50	User Defined 1	User Defined 1
51	User Defined 2	User Defined 2
52	User Defined 3	User Defined 3
55	Asset ID	Asset ID
58	Asset History	Asset History
59	Asset Location	Asset Location
60	Asset Description	Asset Description
65	System	System *
66	System Category	Category
67	System Detail	Detail
68	System Lookup	System Lookup
74	Problem Description	Problem Description *
78	Assigned To Tab	Assigned To
79	Severity	Severity *
81	Priority	Priority
83	Technician	Technician
85	Technician Info Button	Info
86	Technician Lookup button	Lookup assigned Tech

87	Page Tech	Page Tech
88	Email Techs Pager	Email Techs Pager
89	Send text to Cell	Send text message
91	Email Tech Button	Email Tech
92	Email User Button	Email User
93	Tech Group	Tech Group
95	User Defined 4	User Defined 4
97	User Defined 5	User Defined 5
99	User Defined 6	User Defined 6
101	Part of White Board item	Part of White Board item
106	History Tab	History
	(Nothing to configure)	
113	Action Tab	Action Notes
114	Action Taken	Action Taken
116	Action Value	Action Value
119	Action Notes	Notes
121	User Defined 7	User Defined 7
123	User Defined 8	User Defined 8
125	User Defined 9	User Defined 9
127	User Defined 10	User Defined 10
129	Resolution	Resolution
131	Resolved on Overtime ?	Resolved on Overtime ?
132	Resolved with SMS ?	Resolved with SMS ?
133	Resolved over the Phone ?	Resolved over the Phone ?
135	Send Survey when ticket is closed	Send Survey when ticket is closed
137	eMail User on all updates	eMail User on all updates
138	eMail Tech on all updates	eMail Tech on all updates
141	FileAttachments Tab	File Attachments.
144	FileAttachments Upload	Description (* required)
147	FileAttachments Edit	FileAttachments Edit

Advanced:

Schedule LDAP sync:

From the server:

- Create a new Task Schedule
- Point to Iexplore
- C:\PROGRA~1\INTERN~1\iexplore.exehttp://*ServerName*/*HelpDeskPath*/LDAP/Syncer.aspx?SYNC=YES&Type=1
- 'Check' perform the task daily
- Pick a start time (6:00am)
- Provide an local administrator login ID and password

If you have other databases:
*C:\PROGRA~1\INTERN~1\iexplore.exehttp://*ServerName*/*HelpDeskPath*/LDAP/Syncer.aspx?SYNC=YES&Type=2*
*C:\PROGRA~1\INTERN~1\iexplore.exehttp://*ServerName*/*HelpDeskPath*/LDAP/Syncer.aspx?SYNC=YES&Type=3*
*C:\PROGRA~1\INTERN~1\iexplore.exehttp://*ServerName*/*HelpDeskPath*/LDAP/Syncer.aspx?SYNC=YES&Type=4*
*C:\PROGRA~1\INTERN~1\iexplore.exehttp://*ServerName*/*HelpDeskPath*/LDAP/Syncer.aspx?SYNC=YES&Type=5*

Power user Shortcuts:

KEYBOARD SHORTCUTS (when the tabbed ticket is viewable):

1) Change tabs:
<alt>S for the search (Where you can enter a ticket # and hit enter)
<alt>C for caller tab
<alt>A for Assigned to tab
<alt>H for History tab
<alt>W for New Action
<alt>F for File attachments tab

2) On caller tab
<alt>1 for Name lookup
<alt>4 for location lookup
<alt>L for system lookup

3) On any ticket view tab
<alt>V for Save
<alt>N for New Ticket

3) When in the Name or system Lookup "pop-up" window, after you enter the first few letters of the name you want and hit enter, the list should be fairly short. If you see the name as item #1, hit <alt>1 ... If the item is #2, hit <alt>2, etc

Asset-Tracking

The asset-tracking module allows you to keep track of purchase orders and assets. You can also do hardware and software auditing of windows based machines.

People tend to make better decisions if they have better information. The asset-tracking module gives you, the tech director/manager visibility into where your assets are and it gives your techs access to important information about the machines they are working on.

The life cycle of your assets start with a purchase order. You receive items (categorized as either asset or expense) and then you tag the assets. You can change owners and move the equipment around and do inventory checks to confirm the data. And finally you can dispose of the assets.

A separate process is asset auditing where you can extract machine specific information with the software installed. So when your techs work on a machine they have good information available to them.

As part of the asset tracking, you can specify on your helpdesk tickets what parts got replaced. So at the end of the day you can report on hard drives purchased (expensed) and hard drives installed.

The basics to get started are as follows:

1. Enter Purchase order (header information)
2. Enter line item information for each item ordered (coded as either asset or expense).
3. Receive items
4. Assign Asset Tags to the new assets just received (this is the best place to also associate the item with a computer name (if it is a computer) or the computer that it is associated to (example a monitor may have an asset tag, but it's parent asset is the computer it is attached to)
5. Add a script file to the login scripts for your computers to update their information.
6. Add "Replace" items to your choices of "Action taken" on a ticket (example: "Replace Hard drive", "Replace Mother Board", etc)
7. Add ticket actions to future tickets to specify when you replace expense items.

With the above steps in place, you can now enter a helpdesk ticket and when you include an asset tag, you can view purchase information as well as current configurations and any software installed. You can then do a data extract to show how many hard drives you have replaced in the last 6 months.

What about my existing equipment?

How you do it depends on how much work you are willing to invest into it. There is no easy way to do a one for one match. However, you can create a dummy Purchase Order called "Balance Forward". Then create one line item for each type of asset you want to track. Say, for example, you have 1000 computers and 1000 monitors and 50 printers. You could create something like the following:

Line item 1.	250	XP – 3 GHz computers
Line item 2.	250	XP – 2 GHz computers
Line item 3.	250	Win 2000- 1.5 GHz computers
Line item 4.	250	Win 98 – 700 MHz computers

Line item 5.	500	15” monitors
Line item 6.	300	17” monitors
Line item 7.	200	17” flat panel monitors
Line item 8.	25	HP 5000 LaserJet
Line item 9.	25	HP V LaserJet

You would then receive them, assign them to the appropriate departments and then issue them dummy Asset Tags.

Before you start

Before you can use the Asset-tracking features you must include them as a menu option. By default, administrators have this enabled, but you must specifically enable this for the techs:

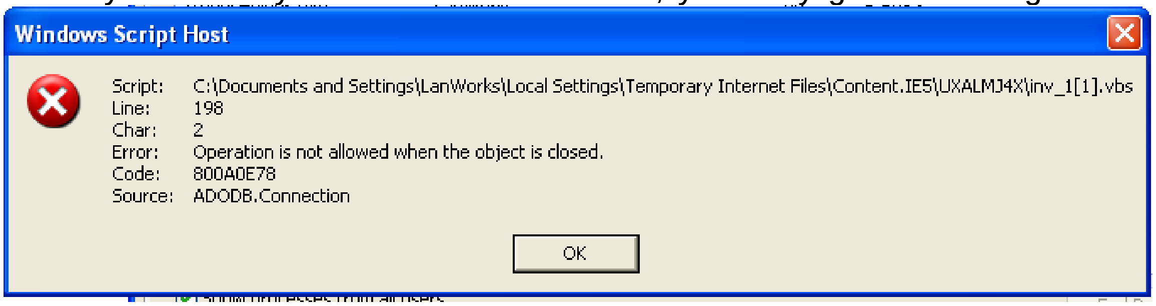
- Login as an administrator
- Select the "Configurator" menu group
- Select the "Menu Editor
- Find the 2 groups items under "Assets" (ID 701 and 702)
- Check for Admin and Techs (not End User)
- Click save
- Find the menu item "Asset Manage rights" (ID 304.5) and make sure Admin is checked
- Click save
- Click refresh on your browser and you should see the new items

Now you have to grant specific rights to specific techs to be able to do anything in the Asset package:

- Login as an administrator
- Select the "People" menu group
- Select the "Asset Manage rights"
- (Administrators automatically have full access so you do not have to assign rights to Administrators … only techs)
- Select a technician from the drop down list
- Check each function you want them to have
- Click Save
- Repeat for any other techs that need this access

How to configure SQL Server 2005 to allow remote connections

When you first try to run a manual audit, you may get a message similar to this:



To fix this is a 3 part process:

1. Enable remote connections on the instance of SQL Server that you want to connect to from a remote computer.
2. Turn on the SQL Server Browser service.
3. Configure the firewall to allow network traffic that is related to SQL Server and to the SQL Server Browser service.

Step 1: Enable remote connections for SQL Server 2005 Express

1. Click Start, point to Programs, point to Microsoft SQL Server 2005, point to Configuration Tools, and then click SQL Server Surface Area Configuration.
2. On the SQL Server 2005 Surface Area Configuration page, click Surface Area Configuration for Services and Connections.
3. On the Surface Area Configuration for Services and Connections page, expand Database Engine, click Remote Connections, click Local and remote connections, click the appropriate protocol to enable for your environment, and then click Apply.
4. On the Surface Area Configuration for Services and Connections page, expand Database Engine, click Service, click Stop, wait until the MSSQLSERVER service stops, and then click Start to restart the MSSQLSERVER service.

Step 2: Enable the SQL Server Browser service

1. Click Start, point to Programs, point to Microsoft SQL Server 2005, point to Configuration Tools, and then click SQL Server Surface Area Configuration.
2. On the SQL Server 2005 Surface Area Configuration page, click Surface Area Configuration for Services and Connections.
3. On the Surface Area Configuration for Services and Connections page, click SQL Server Browser, click Automatic for Startup type, and then click Apply.
4. Click Start, and then click OK.

Step 3: Create exceptions in Windows Firewall (only if enabled)

These steps apply to the version of Windows Firewall that is included in Windows XP Service Pack 2 (SP2) and in Windows Server 2003. If you are using a different firewall system, see your firewall documentation for more information.

If you are running a firewall on the computer that is running SQL Server 2005, external connections to SQL Server 2005 will be blocked unless SQL Server 2005 and the SQL Server Browser service can communicate through the firewall. You must create an exception for each instance of SQL Server 2005 that you want to accept remote connections and an exception for the SQL Server Browser service.

SQL Server 2005 uses an instance ID as part of the path when you install its program files. To create an exception for each instance of SQL Server, you must identify the correct instance ID. To obtain an instance ID, follow these steps:

1. Click Start, point to Programs, point to Microsoft SQL Server 2005, point to Configuration Tools, and then click SQL Server Configuration Manager.
2. In SQL Server Configuration Manager, click the SQL Server Browser service in the right pane, right-click the instance name in the main window, and then click Properties.
3. On the SQL Server Browser Properties page, click the Advanced tab, locate the instance ID in the property list, and then click OK.

To open Windows Firewall, click Start, click Run, type firewall.cpl, and then click OK.
Create an exception for SQL Server 2005 in Windows Firewall
To create an exception for SQL Server 2005 in Windows Firewall, follow these steps:

1. In Windows Firewall, click the Exceptions tab, and then click Add Program.
2. In the Add a Program window, click Browse.
3. Click the C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Binn\sqlservr.exe executable program, click Open, and then click OK.

Note The path may be different depending on where SQL Server 2005 is installed. MSSQL.1 is a placeholder for the instance ID that you obtained in step 3 of the previous procedure.
4. Repeat steps 1 through 3 for each instance of SQL Server 2005 that needs an exception.

Create an exception for the SQL Server Browser service in Windows Firewall
To create an exception for the SQL Server Browser service in Windows Firewall, follow these steps:

1. In Windows Firewall, click the Exceptions tab, and then click Add Program.
2. In the Add a Program window, click Browse.
3. Click the C:\Program Files\Microsoft SQL Server\90\Shared\sqlbrowser.exe executable program, click Open, and then click OK.

You must also add SQL browser service executable to the exception list as it listens on UDP port 1434.

WMI troubleshooting:

Q: Why I can't get information from a PC with Windows 2003?
A: In Windows XP and earlier, the WMI Windows Installer Provider is installed by default. In Windows 2003 the WMI Windows Installer Provider is an optional component. To install this provider, open the Control Panel Add/Remove Programs applet and click Add/Remove Windows Components. Select the Management and Monitoring Tools check box, then click Details. Select the WMI Windows Installer Provider check box, and click OK.

Q: Why I can't get information from a user PC with Windows 95/98?
A: You must install the WMI core. You can download it from www.microsoft.com

Q: I have installed WMI core on PCs with Windows 95/98, but can't get information from them.
A: The Windows Management service starts automatically on computers running Microsoft® Windows NT®/Microsoft® Windows® 2000, but not on computers running Windows 95/98. To set up the Windows Management service to start automatically on a Windows 95/98 system, you must make the following changes to the operating system registry. To set up the Windows Management service to run automatically on a computer running Windows 95/98

1. In the registry, navigate to the value named EnableRemoteConnect.
2. Under the key HKLM\SOFTWARE\MICROSOFT\OLE, set EnableDCOM to "Y" if it is not set to "Y" already. "Y" is the default setting.
3. In the registry under the key HKLM\SOFTWARE\MICROSOFT\OLE, set EnableRemoteConnect to "Y". The default setting for the EnableRemoteConnect value is "N" for Windows 95/98 systems.
4. Place the following entry in the registry to enable the WMI automatic start feature: \HKLM\SOFTWARE\Microsoft\wbem\cimom - AutostartWin9X
5. Set the AutostartWin9X value to either "1" or "2". The following table lists possible values for AutostartWin9X and their meanings.

Value	Meaning
"0"	Manual Use this setting when you do not need the service running continuously. When a local request comes in, WMI starts to service the request. If you later restart the computer, the computer will start in manual mode (WMI will not start automatically). Note that remote startup requests are only supported on Windows NT/Windows 2000. Remote startup requests are not supported by COM on Windows 95/98.
"1"	Automatic if the computer system needs to reload Use this setting if you would normally have active event consumers. If WMI has active event consumers and the system (any system that supports WMI) needs to be restarted, WMI starts automatically after the system starts.

"2"	Automatic Windows Management service always starts automatically.

6. Add the file Winmgmt.exe to the computer's Startup directory. You can find this file in the \Windows\WBEM directory.
7. Under the key \HKLM\SOFTWARE\Microsoft\wbem\cimom set EnableAnonConnections to "1".