



Service Desk Hands-on Exercise

Service Desk Overview

Service Desk (SD) is intended to provide a central or single point of contact to meet the communication needs of *users* and *IT employees* with respect to some *support issues (tickets)*. We divide users to **end users** who are the actual users of the service and **contacts** who represent end users. We divide IT employees to **admins** who design and maintain service desks and **technicians** who use the service desks. Most communications happen between contact and technicians with respect to tickets.

A **support issue** may be:

- asking a question
- reporting a problem
- requesting for a service
- suggesting a new feature

We refer to support issues as **tickets**.

A **resource pool** is a group of technicians allocated to specific areas of general or specific service. We may refer to resource pools simply as **pools**.

Types of service desks

- **Call center:** A centralized office used for the purpose of receiving and transmitting a large volume of requests by telephone.
- **Contact center:** A facility used by companies to manage all client contact using telephone, fax, letter, e-mail and increasingly, online live chat.
- **Help desk:** An information and assistance resource that troubleshoots problems with computers or similar products via a toll-free number, website, and e-mail.

We focus only on help desks.

Why Kaseya Service Desk?

The Kaseya Service Desk (KSD):

- Keeps track of support issues & responses
- Coordinates all communications
- Provides templates for uniform response
- Provides automated notifications, escalations, and in some cases automated response
- Enables designing service desks based on the requests and resources
- Enables further customization and refinement of service desks based on gradual changes in the requests and resources

Designing Service Desks

As a SD Admin, you are in charge of *designing* and *refining* service desks.

General Guidelines

Simplicity: Make your life easy!

- SD should be designed as simple as possible, while satisfying the communication needs of users and IT employees.

Efficiency: Get the biggest bang for your buck!

- SD should be designed so that the resources are best utilized while the response time meets the designated deadlines.

To design a simplified and efficient desk:

- We must be fully aware of the needs of your users and based on that define the required **ticket properties**, such as, states, priorities, categories, severities, resolutions, etc.
- We must define the ticket life cycle or the **workflow** of your desk using stages, transitions, and their automated behavior.
- We must be fully aware of the skill set and experience of your **resources** to define their roles and associate them to appropriate resource pools.

Background Story

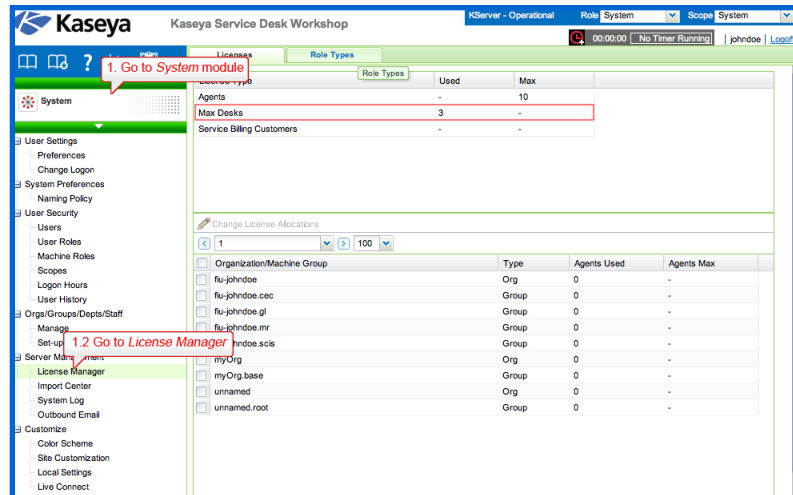
Lately many users complained that the services requested were not completed on time or they never received a response from the IT support staff. Management decided to organize the IT support requests at FIU. To address this concern, they require a system to track the service requests from when a ticket is created to the time it is resolved and completed.

As the head technician, you have decided to use Kaseya Service Desk (KSD) to accomplish these tasks. The Kaseya Service Desk module manages an organization's response to support issues. A support issue may be a question, a problem, a request for service, or a suggestion for a future enhancement.

Part 1

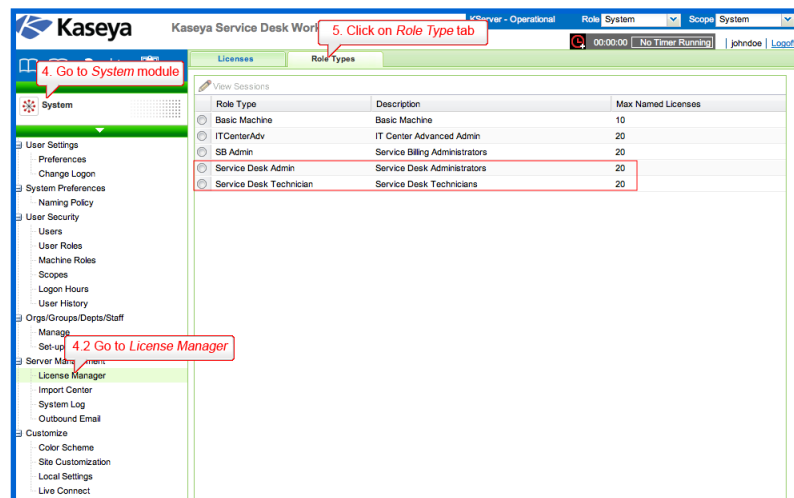
It is always a good practice to check your licenses for desks and users before starting with KSD. To do that we need to go to System module and under License Manager Page we can check the number of licenses available for Service Desk.

1. Go to *System > License Manager*.
2. Select the *Licenses* tab.
3. Check the *Max Desks* row to see how many desk have been used and what is the maximum number of desks that you can create



- Now we are going to check the number of licenses for the users.

4. Go to *System > License Manager*.
5. Select the *Role Type* tab.
6. Check the *Service Desk Admin* row to see the maximum named licenses for SD Admins.
7. Check the *Service Desk Technician* row to see the maximum named licenses for SD technicians.



Part 2

You are going to define a desk using a desk template, instead of creating a service desk from scratch. You can jump start by using desk templates provided. By choosing an appropriate service desk template, you can learn about the best practices in managing tickets, while you still have the opportunity to customize your desk to your needs. There are two ways to create a desk using templates. You can create a desk using *Desk Configuration > Desk Definition* page or you can install a pre-configured desk using *Templates > Desk Templates* pages.

- Create an ITIL Incident service desk named **<USERNAME>_SD**.

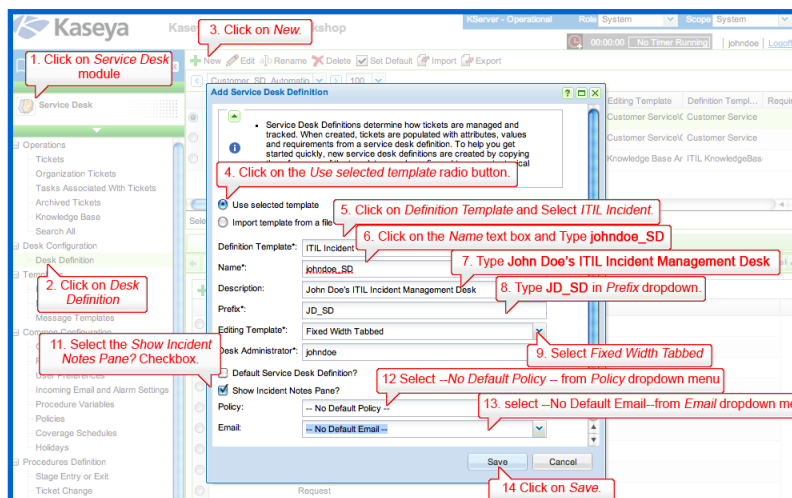
1. Open the *Service Desk* module.

2. Go to *Desk Configuration > Desk Definition*
3. Click on *New*.
4. Click on the *Use selected template* radio button.
5. Select *ITIL Incident* from the *Definition Template* dropdown menu.
6. Type **<USERNAME>_SD** in the *Name* textbox.

Note: When creating a desk name avoid using spaces or special characters.

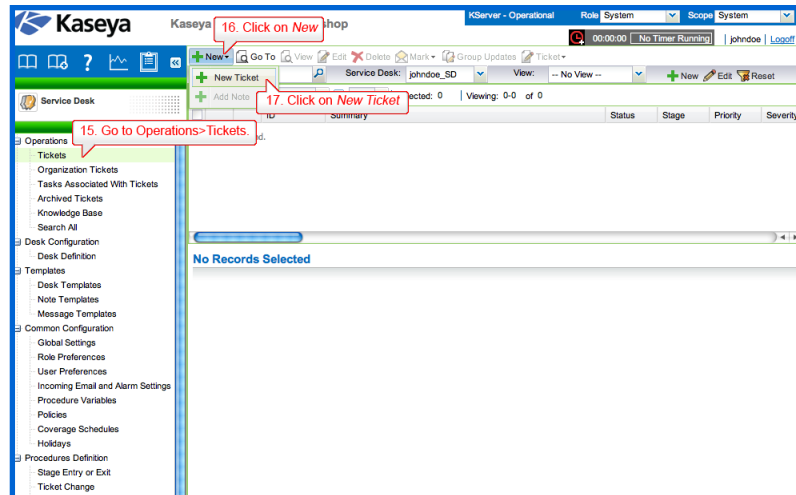


7. Type **<FIRSTLASTNAME>'s ITIL Incident Management** in the *Description* textbox.
8. Type **<INITIALS>_SD** in the *Prefix* textbox.
9. Select *Fixed Width Tabbed* from the *Editing Template* dropdown menu.
10. Select **<USERNAME>** from the *Desk Administrator* dropdown menu.
11. Select the *Show Incident Notes Pane?* Checkbox.
12. Select *-- No Default Policy --* for *Policy*.
13. Select *-- No Default Email --* for the *Email* field.
14. Click on *Save*.

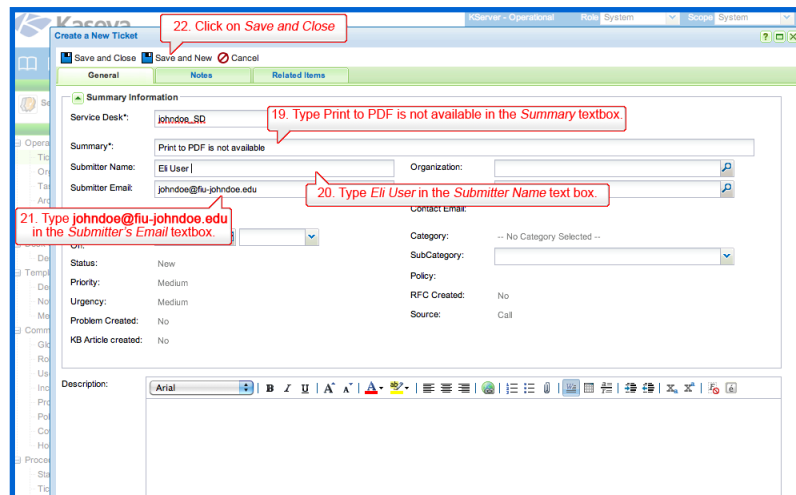


-Create a ticket to test your newly made service desk.

15. Go to *Operations>Tickets*.
16. Select **<USERNAME>_SD**, is selected from the *Service Desk* dropdown box.
17. Click on *New*
18. Select *New Ticket*. A window for creating a new ticket pops up.



19. Type **Print to PDF is not available** in the *Summary* textbox.
20. Type **Eli User** in the *Submitter Name* text box.
21. Type **johndoe@fiu-johndoe.edu** in the *Submitter's Email* textbox.
22. Click on the *Save and Close* button.

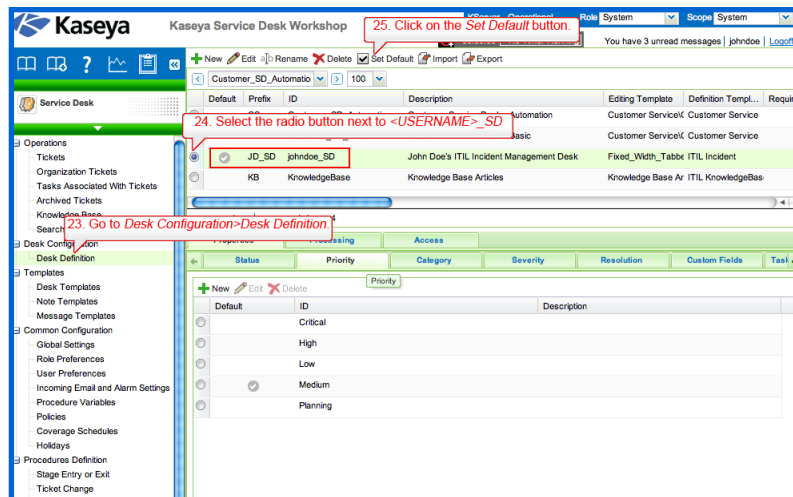


Notes

Note: The format of this form and the fields that appear on this form follow the *Fixed Width Tabbed* editing template that you chose when you created this service desk.

-Set your Service Desk as the default desk.

23. Go to *Desk Configuration>Desk Definition*.
24. Select the radio button next to **<USERNAME>_SD**
25. Click on the *Set Default* button.

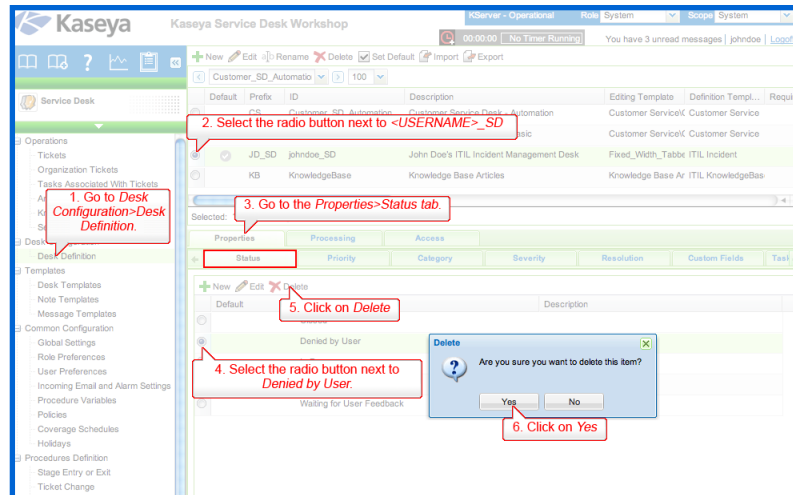


Part 3

Now you want to learn more about the service desk properties and their default selections so that you can customize them to your needs. Based on the needs of your users, the types of requests, and their expectation of your service, you should define appropriate values for your ticket properties. Reviewing the different statuses that were defined in the ITIL Incident desk, you realize that you need the **New**, **In Progress**, **Waiting for User Feedback**, and **Closed** statuses, but as you do not see any need for the **Denied by User** status; therefore, you decide to delete this status to simplify your desk.

-Add **New**, **In Progress**, **Waiting for User Feedback** and **Closed** to your desk status, and then delete **Denied by User** status.

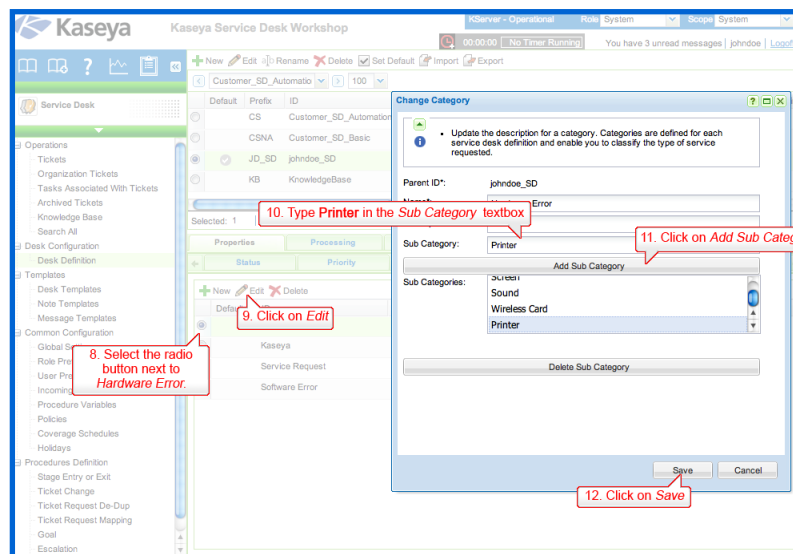
1. Go to *Desk Configuration > Desk Definition*.
2. Select the **<USERNAME>_SD** desk.
3. Go to the *Properties > Status* tab.
4. Select the radio button next to *Denied by User*.
5. Click on *Delete* button.
6. Click on *Yes*.



Now looking at the Categories tab, you realized that **Printer** is missing from **Hardware Error**; the **Sales Related** sub-category in **Service Request** is irrelevant to your desk; the **Request new PC** sub-category should not be under the **Service Request** category; a category for **Purchase with Request for Quote** and **Request for Purchase** sub-categories is missing **PantherSoft**, the student management software used at FIU, is missing from the sub-categories of **Software Error**.

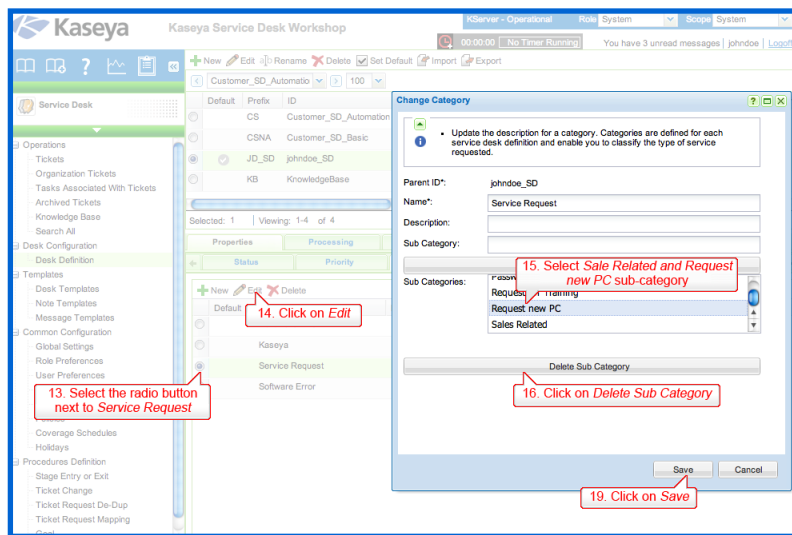
-Add **Printer** as a sub-category for the *Hardware Error* category.

7. Under **Properties** tab click on **Categories**.
8. Select the radio button next to *Hardware Error*.
9. Click on *Edit*.
10. Type **Printer** in the *Sub Category* textbox.
11. Click on the *Add Sub Category* button.
12. Click on the *Save* button.



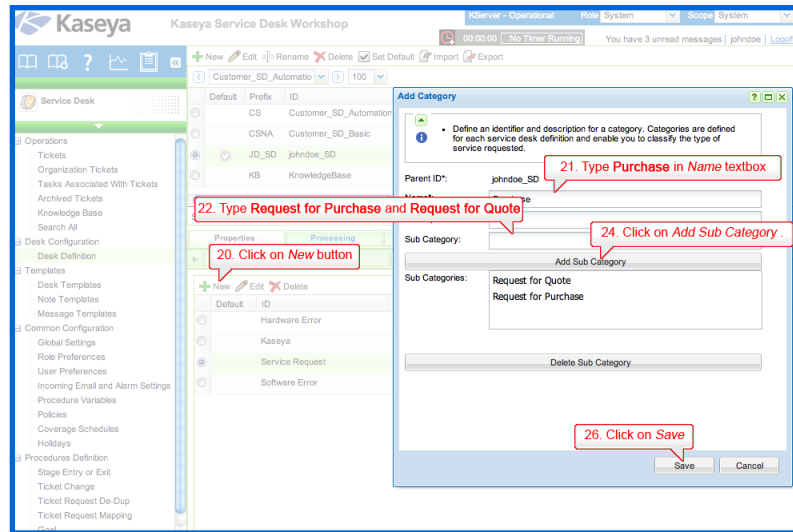
- Delete **Sales Related** and **Request new PC** from the sub-categories of the *Service Request* category.

13. Select the radio button next to *Service Request* category.
14. Click on the *Edit* button.
15. Select the **Sales Related** sub-category in the *Sub-Categories* list box.
16. Click on the *Delete Sub Category* button.
17. Select the **Request new PC** sub-category in the *Sub Categories* list box.
18. Click on the *Delete Sub Category* button.
19. Click on the *Save* button.



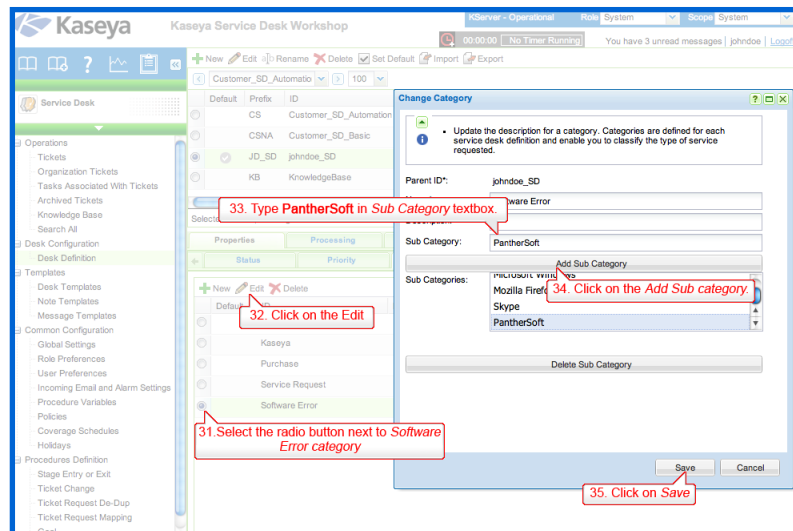
- Add **Purchase** as a new category with **Request for Quote** and **Request for Purchase** as its sub-categories.

20. Click on the *New* button
21. Type **Purchase** in the *Name* textbox.
22. Type **Request for Quote** in the *Sub Category* textbox.
23. Click on the *Add Sub Category* button.
24. Type **Request for Purchase** in the *Sub Category* textbox.
25. Click on the *Add Sub Category* button.
26. Click on the *Save* button.



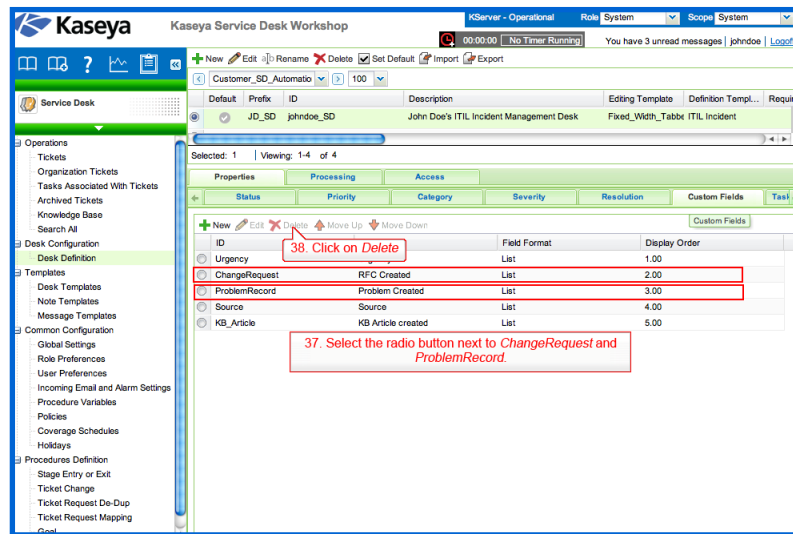
- Add **PantherSoft** as a sub-category for the *Software Error* category.

27. Select the *Software Error* category
28. Click on the *Edit* button.
29. Type **PantherSoft** in the *Sub Category* textbox.
30. Click on the *Add Sub Category* button.
31. Click on the *Save* button.



- Continuing your review of the custom fields, you cannot think of any use for the **ChangeRequest** and **ProblemRecord** custom fields. So you delete these fields.

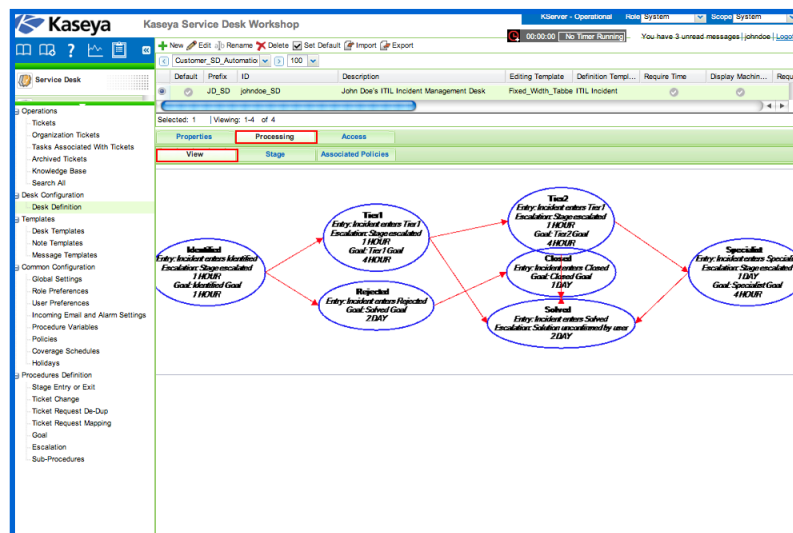
32. Select the radio button next to **ChangeRequest**.
33. Click on *Delete* button.
34. Select the radio button next to **ProblemRecord**.
35. Click on *Delete* button.



Part 4

Now that you have adjusted the service desk properties to your liking, you want to learn more about the service desk processing and its automation settings so that you can customize them to your needs. The sequence of stages is user-defined. It depends on the policies defined by your organization and your judgment. To review the stages and their transitions, you can go to *Processing > View* tab.

1. Go to *Desk Configuration > Desk Definition*.
2. Go to the *Processing > View* tab



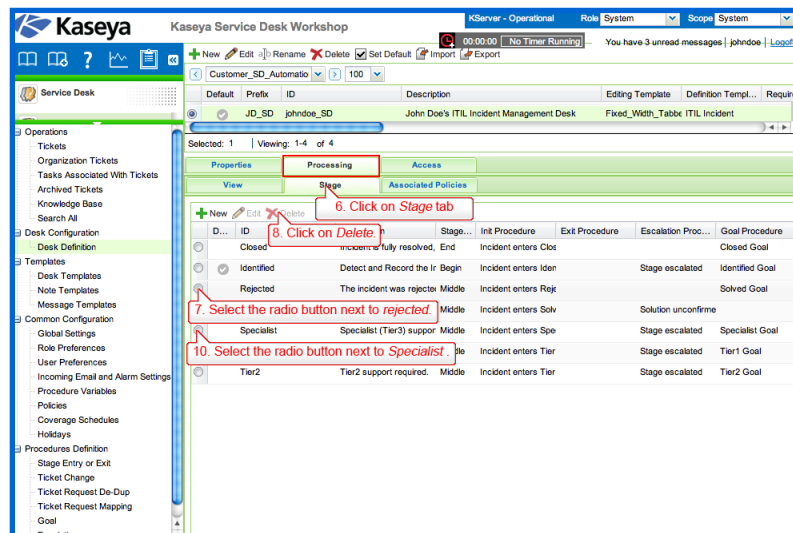
Note: simplicity is the key to success. The simpler your desk, the easier is its management. So, if you really do not need a stage, you should remove it from your desk.

- You notice that you do not need the **Rejected** stage; you can simply merge this stage to the **Closed** stage and reflect the way the ticket was resolved using the **Resolution** property. However you notice that the ticket going to the **Solved** Stage may be reopened; therefore, you need to allow tickets in this stage to be able to go to the **Tier2** stage too. Moreover, based on the volume of the tickets that you have been receiving in the past, and your estimated projection of the future tickets, your resolution goal time, and the number of individuals in your support team and their expertise, you realize that **Specialist** is not yet necessary for

your desk as it just makes things unnecessarily more complex.

-Delete rejected and Specialist stages.

1. Go to *Service Desk > Desk Definition*.
2. Select **<USERNAME>_SD** desk.
3. Click on the *Processing* tab.
4. Click on the *Stage* tab.
5. Select the *Rejected* stage from the list of stages.
6. Click on *Delete*.
7. Click on *Yes*.
8. Select the *Specialist* stage.
9. Click on *Delete*.
10. Click on *Yes*.

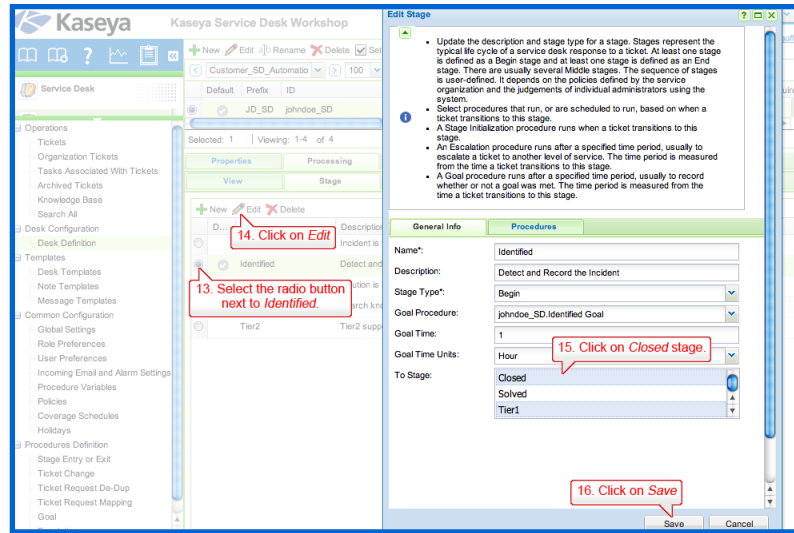


Notes

Note: Before removing a stage from your desk workflow, we suggest studying the settings of the stage and how the other stages may be dependent on this one, so that you can appropriately adjust the remaining stages.

-Connect **Identified** stage to **Closed** stage and connect the **Solved** stage to **Tier2**.

11. Select the *Identified* stage.
12. Click on *Edit*.
13. Hold the *Ctrl* key and click on the *Closed* stage in the *stage* list box.
14. Click on *Save*.

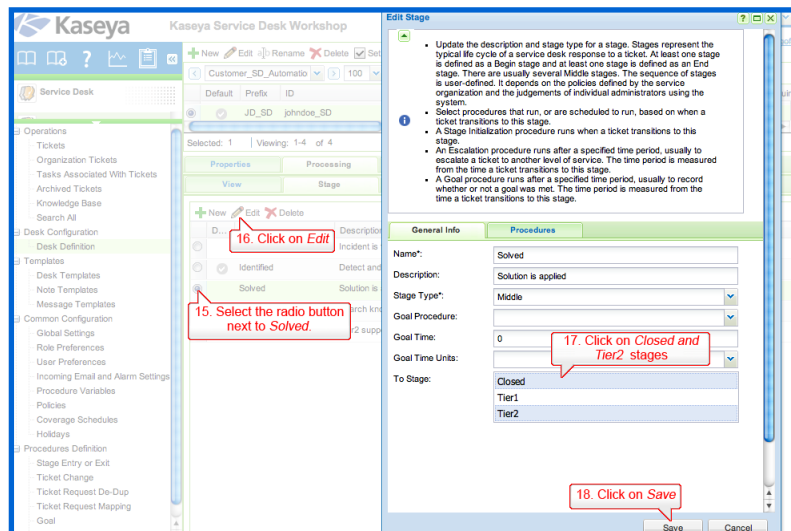


15. Select the *Solved* stage on the lower right pane.

16. Click on *Edit*.

17. Hold the *Ctrl* key and click on the *Tier2* stage in the *To Stage* list box.

18. Click on *Save*.

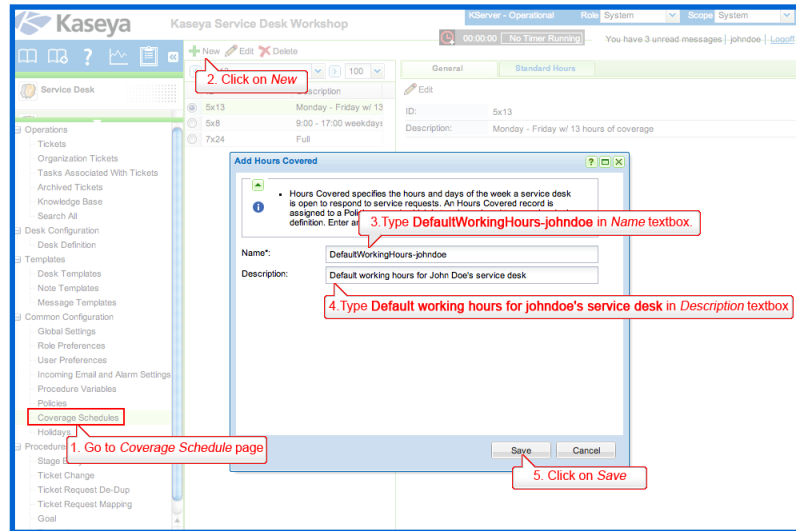


Part 5

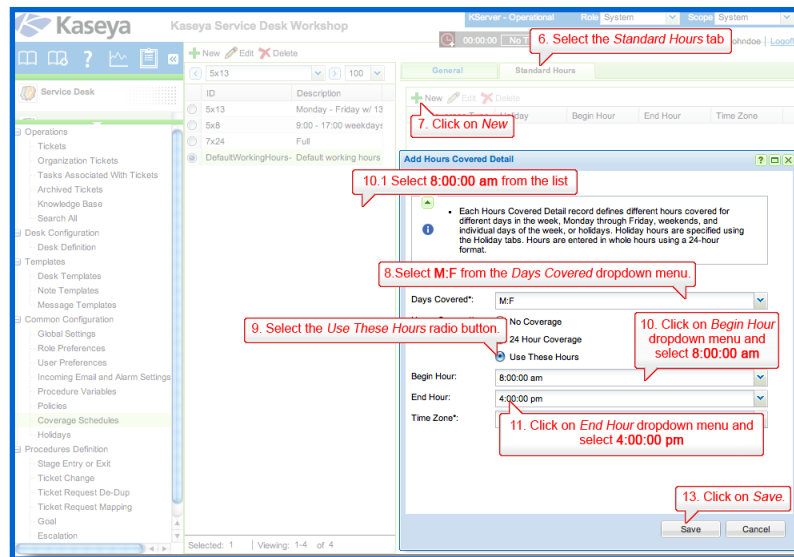
Based on the availability of your team members and the type and urgency of tickets that you may receive, you need to define a *default* policy for your service desk that reflects the coverage hours of operation, holidays, and the method of contact. Your team works on week days, 8 to 4 pm ET. No work on Christmas Day (Dec 25th, New Year Jan 1st, and US Independence Day (July 4th). Method of contact is email and phone.

-Define the hours and days of the year a service desk is open to respond to service requests using Coverage Schedules. This includes hours of coverage to standard holidays.

1. Go to *Common Configuration> Coverage Schedules*.
2. Click on *New*.
3. Type *DefaultWorkingHours-<USERNAME>* in the *Name* textbox.
4. Type *Default working hours for <FIRSTLASTNAME>'s service desk* in the *Description* textbox.
5. Click on *Save*.

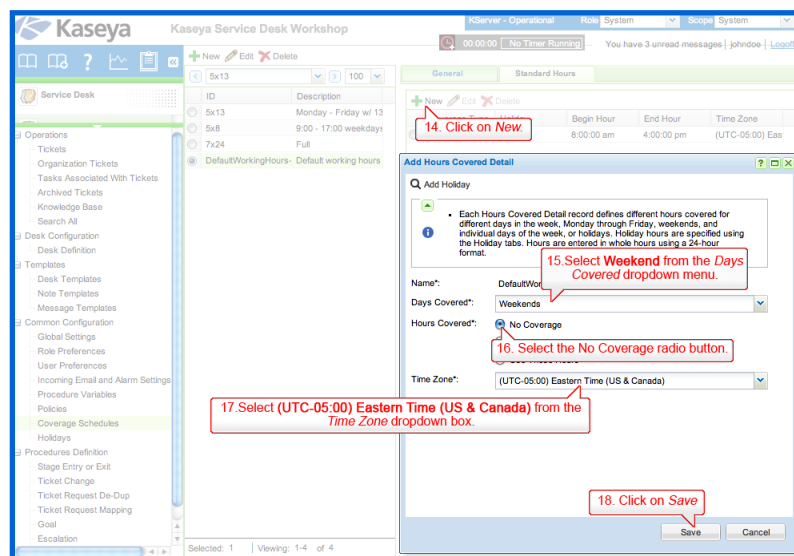


6. Select the *Standard Hours* tab on the upper right pane.
7. Click on *New* on the upper right pane.
8. Select *M:F* from the *Days Covered* dropdown box.
9. Select the *Use These Hours* radio button.
10. Type *8:00:00 am* in the *Begin Hour* textbox.
11. Type *4:00:00 pm* in the *End Hour* textbox.
12. Select *(UTC-05:00) Eastern Time (US & Canada)* from the *Time Zone* dropdown box.
13. Click on *Save*.



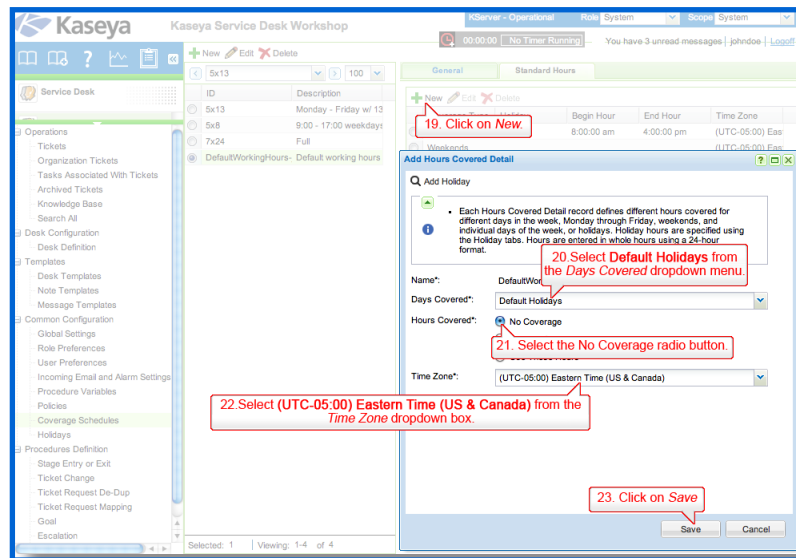
-Set the hours for weekends and holidays.

14. Under *Standard Hours* tab Click on *New*.
15. Select *Weekends* from the *Days Covered* dropdown box.
16. Select the *No Coverage* radio button.
17. Select *(UTC-05:00) Eastern Time (US & Canada)* from the *Time Zone* dropdown box.
18. Click on *Save*.



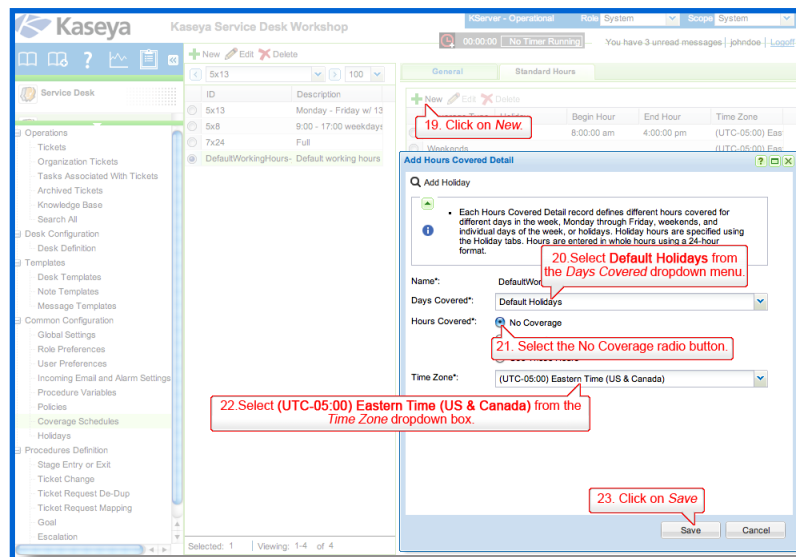
19. Click on *New* again.
20. Select *Default Holidays* from the *Days Covered* dropdown box.
21. Select the *No Coverage* radio button.
22. Select *(UTC-05:00) Eastern Time (US & Canada)* from the *Time Zone* dropdown box.

23. Click on **Save**.



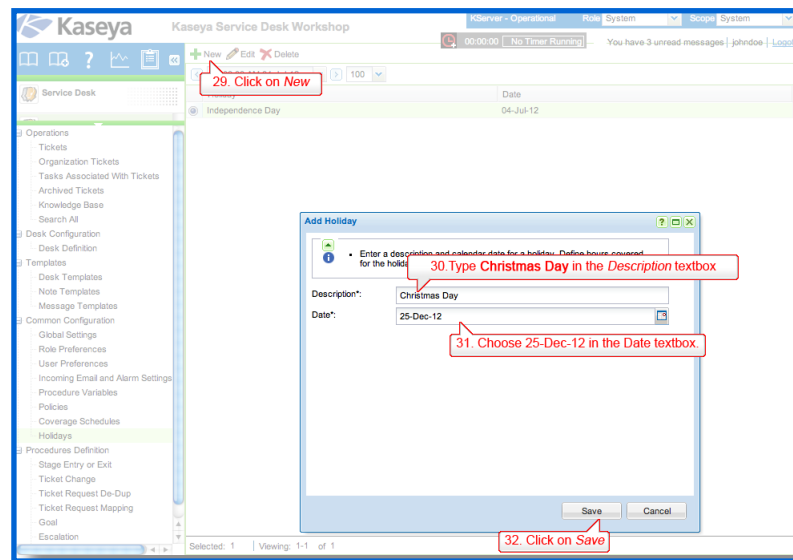
-Define Holidays.

24. Go to *Common Configuration > Holidays*.
25. Click on **New**.
26. Type *Independence Day* in the *Description* textbox.
27. Choose *04-Jul-12* in the *Date* textbox.
28. Click on **Save**.



29. Click on **New**.
30. Type *Christmas Day* in the *Description* textbox.
31. Choose *25-Dec-12* in the *Date* textbox.

32. Click on **Save**.

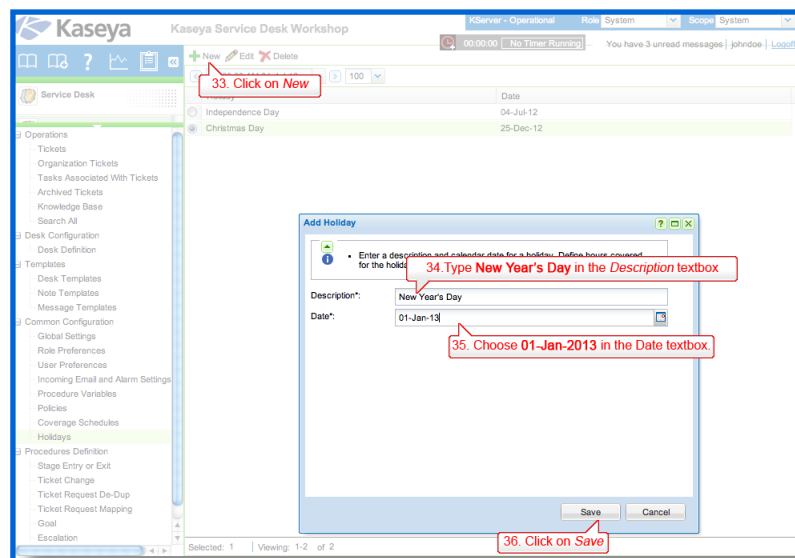


33. Click on **New**.

34. Type **New Year's Day** in the **Description** textbox.

35. Choose **01-Jan-13** in the **Date** textbox.

36. Click on **Save**.



-Define policies regulating how a service desk can be contacted and link the policy to the service desk.

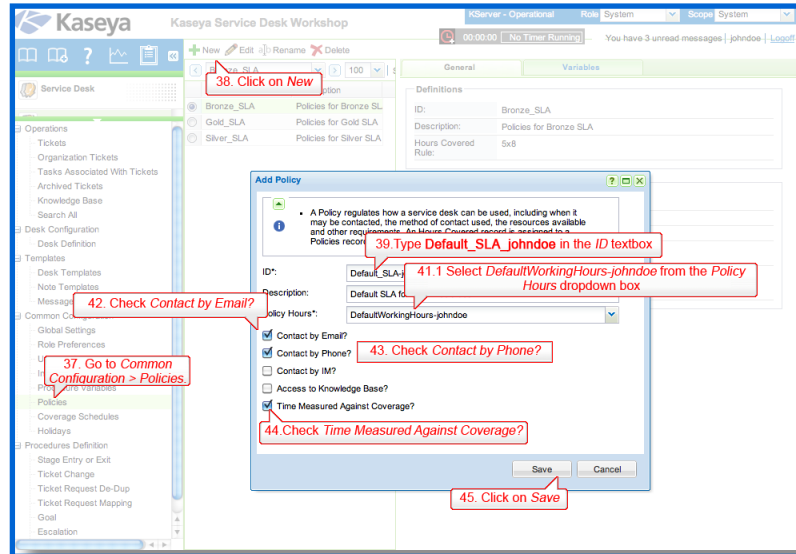
37. Go to **Common Configuration > Policies**.

38. Click on **New**.

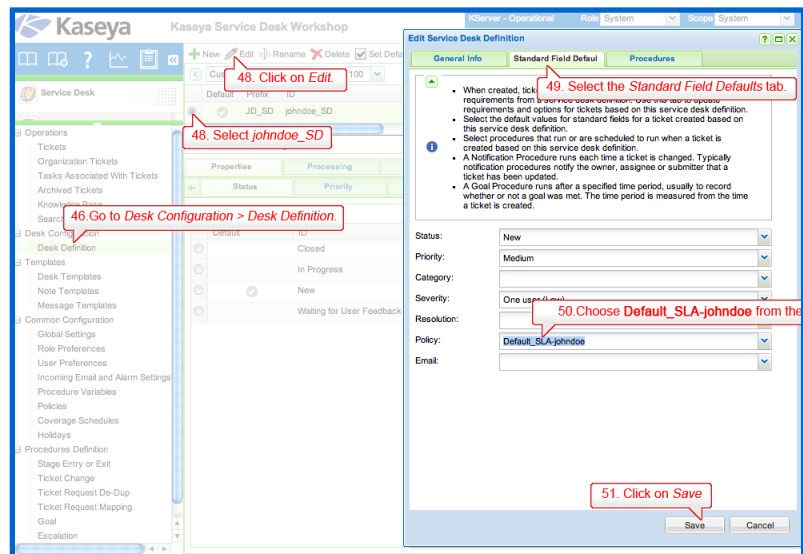
39. Type **Default_SLA-<USERNAME>** in the **ID** textbox.

40. Type **Default SLA for <FIRSTLASTNAME>'s desk** in the **Description** textbox.

41. Choose *DefaultWorkingHours-<USERNAME>* from the *Policy Hours* dropdown box.
42. Check *Contact by Email*?
43. Check *Contact by Phone*?
44. Check *Time Measured Against Coverage*?
45. Click on *Save*.



46. Go to *Desk Configuration > Desk Definition*.
47. Choose your service desk on the upper right pane.
48. Click on *Edit*.
49. Select the *Standard Field Defaults* tab.
50. Choose *Default_SLA-<USERNAME>* from the *Policy* dropdown box.
51. Click on *Save*.

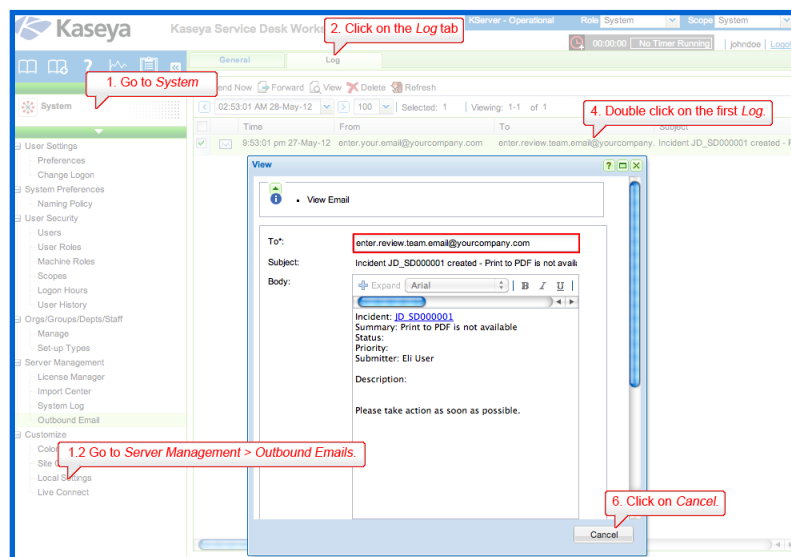


Part 6

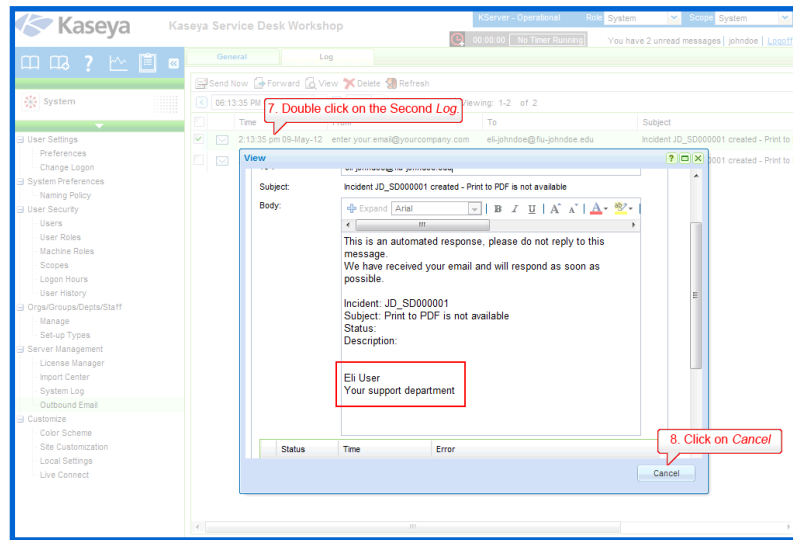
It has come to your attention that email notifications have not been received by members of your team when the new ticket was created by you. Also the end user with the print PDF issue, has informed you that the content of the notifications is too generic, it does not reflect anything about your team at FIU, and he wonders if he replies to that email, how it will be link to the original ticket. To have a better understanding of the situation with regards to the status of email notifications, you visit the *System > Outbound Email* page to review the notification emails sent for the ticket that you created.

-Review outbound Emails.

1. Go to *System > Outbound Emails*.
2. Click on the *Log* tab on the right pane.
3. Find the two emails sent out with `<INITIALS>_SD000001` included in the subject line.
4. Double click on the first one.
5. Observe that the *To* field is set to enter.review.team.email@yourcompany.com, which is not a real email address and obviously would need to be replaced with your review team email.
6. Click on *Cancel*.

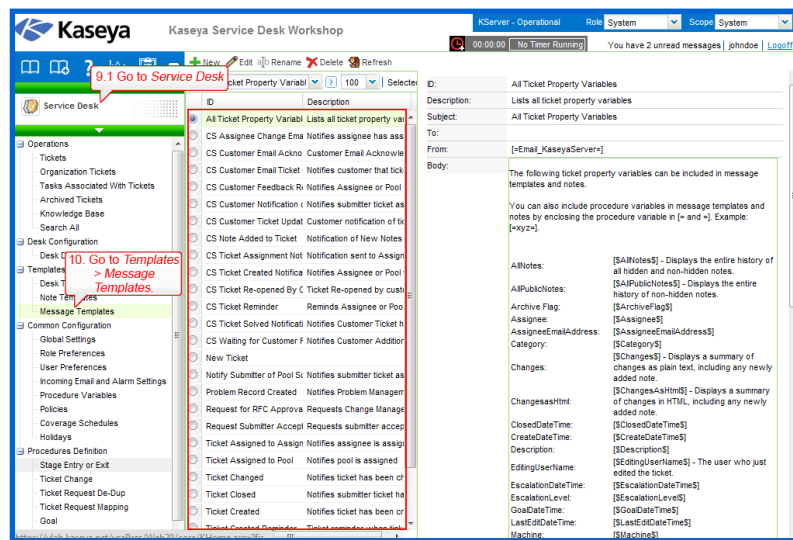


7. Double click on the second email.
8. Observe that this email is signed by *Len User*, which is the submitter of the email, the recipient of this email too, and considered as a member of *Your support department*! So, there are two issues with this notification: you do not want the email to be signed by the submitter and you do want to make the reference to your team more specific. Finally, *~ticipid* should be added to the *Subject*.



- Now you need to review the message templates to find the templates used for these two notifications. Take a quick look at the *Entry* procedure for the *Incident* stage of your desk.

9. Open *Service Desk* module
10. Go to *Templates > Message Templates*.



- You observe that there are so many messages templates; examining all of them may take a long time. So, you decide to go to the *Entry* procedure of the *Incident* stage.

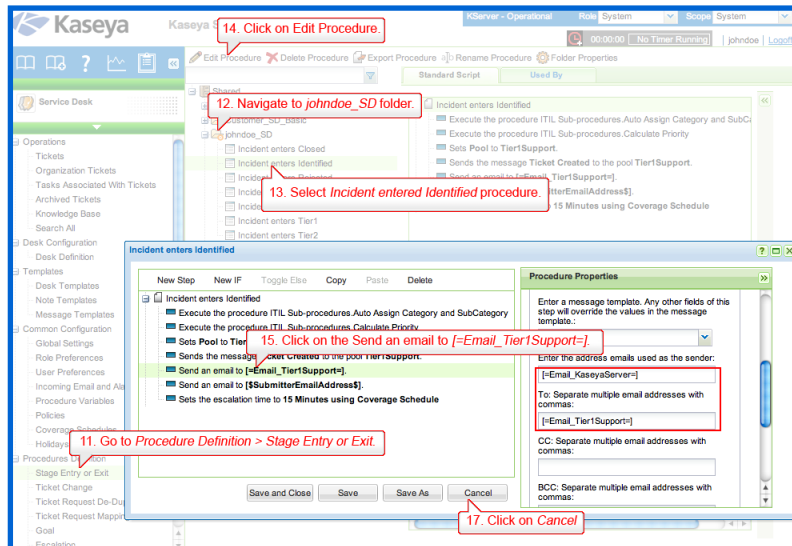
11. Go to *Procedure Definition > Stage Entry or Exit*.
12. Navigate to *<USERNAME>_SD* folder.
13. Click on *Incident entered Identified*.
14. Click on *Edit Procedure*.
15. Click on the *Send an email to [=Email_Tier1Support=]*.

-You see that the *Ticket Created* message template was used, the procedure variable *Email_Tier1Support* was used for the *To* field, and *Email_KaseyaServer* for the *From* field.

16. Click on the *Send an email to [=Submitter_EmailAddress=]*.

-You see that the *Ticket Creation Acknowledgement* message template was used, the procedure variable *Email_Tier1Support* was used for the *To* field, and *Email_KaseyaServer* for the *From* field.

17. Click on *Cancel*.



- Set the value of the following procedure variables as *[=SupportSignature=]* should be set to "**FIU Support Team**" *[=Email_KaseyaServer=]* should be set to *<YOURSUPPORTEMAIL>* *[=Email_Tier1Support=]* should be set to a comma separated email list of your team members in *tier1*.

18. Go to *Templates > Message Template*.

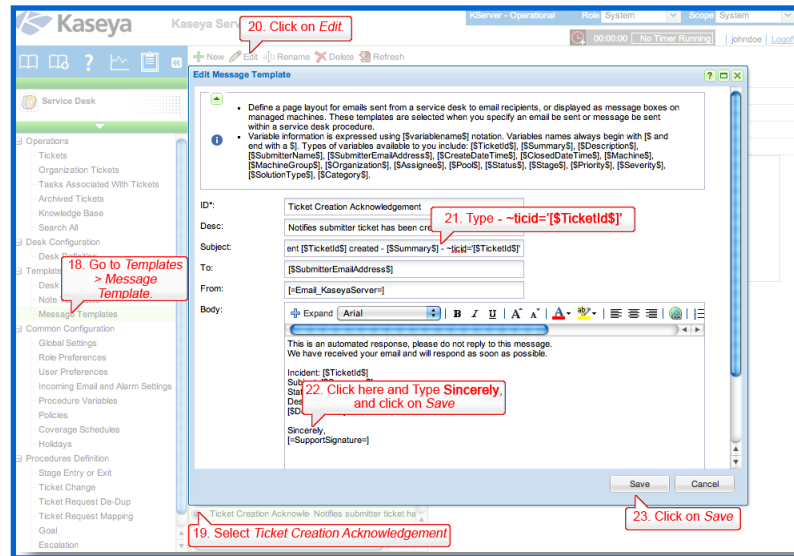
19. Select the *Ticket Creation Acknowledgement* message template from the list in the right pane.

20. Click on *Edit*.

21. In the *Subject* append - *~tictid=[\${TicketId}]*'.

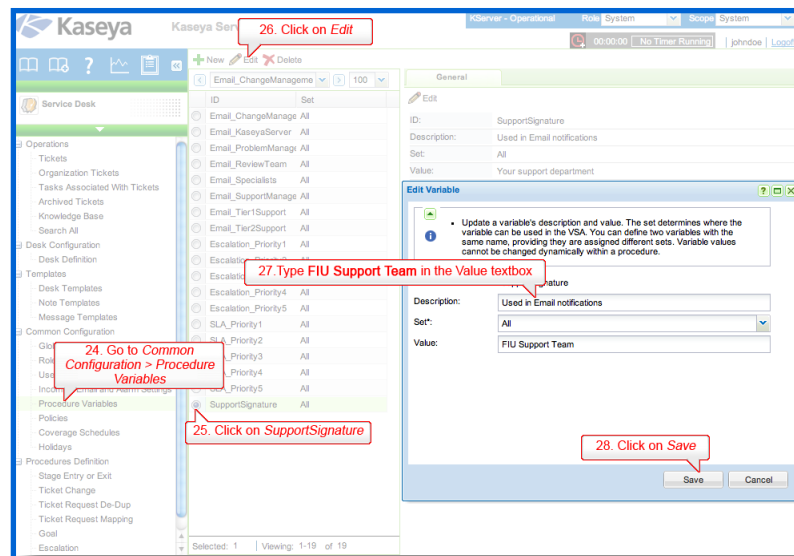
22. In the editor for the body of the message, replace *[\${Submitter_Name\$}]* with "**Sincerely,**"

23. Click on *Save*.

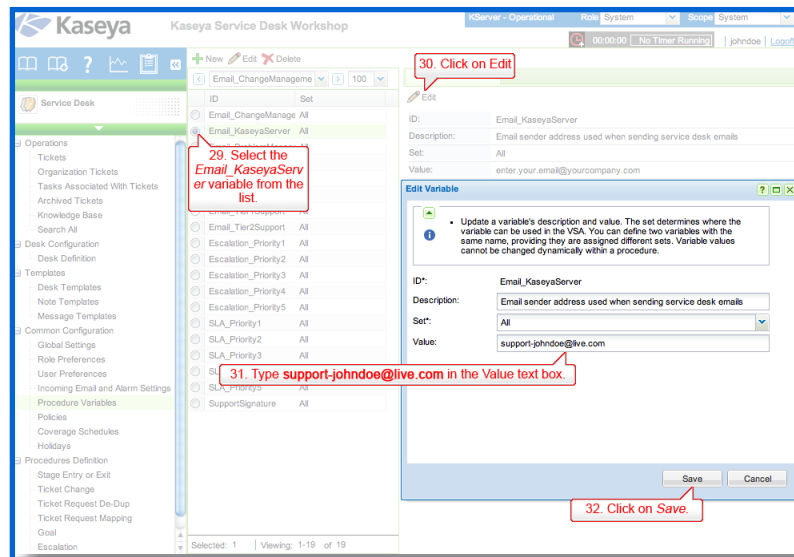


-Now you need to correct the Values of Some Procedure Variables.

24. Go to *Common Configuration > Procedure Variables*.
25. Select the *SupportSignature* variable from the list on the right pane.
26. Click on *Edit*
27. Type *FIU Support Team* in the *Value* text box.
28. Click on *Save*.



29. Select the *Email_KaseyaServer* variable from the list on the right pane.
30. Click on *Edit*
31. Type *<YOURSUPPORTEMAIL>* in the *Value* text box.
32. Click on *Save*.



33. Select the *Email_Tier1Support* variable from the list on the right pane.

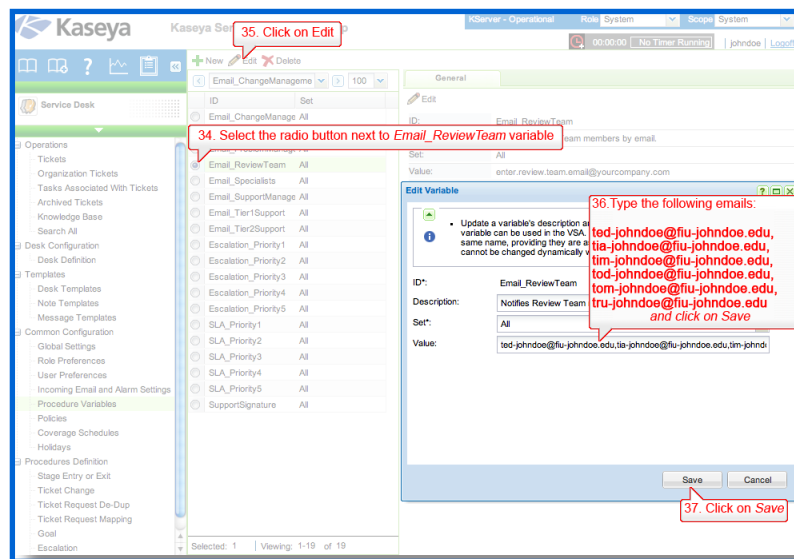
- You observe that the value of this variable is set using yet another procedure variable, namely, *Email_ReviewTeam*. You decide to change that variable instead.

34. Select the *Email_ReviewTeam* variable from the list on the right pane.

35. Click on *Edit*

36. Type **ted-johndoe@fiu-johndoe.edu, tia-johndoe@fiu-johndoe.edu, tim-johndoe@fiu-johndoe.edu, tod-johndoe@fiu-johndoe.edu, tom-johndoe@fiu-johndoe.edu, tru-johndoe@fiu-johndoe.edu** in the *Value* text box.

37. Click on *Save*.

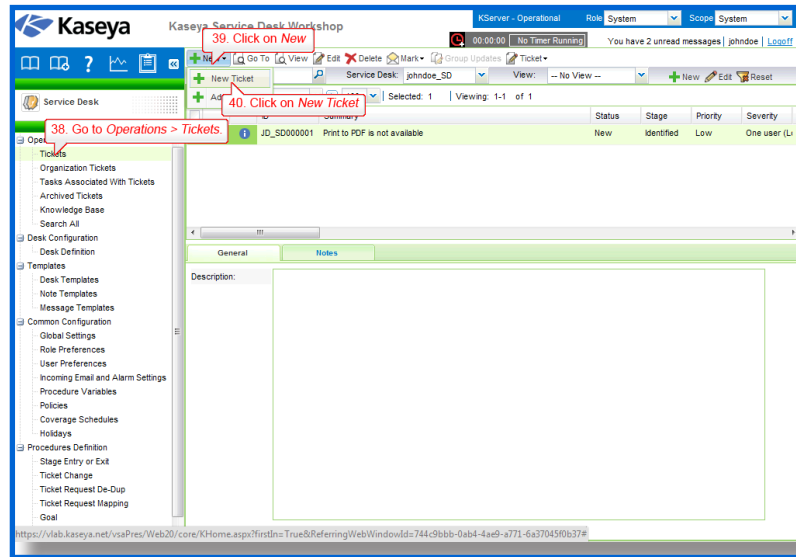


-To verify your changes, you should submit a test ticket to see whether the changes that you have made to the message templates and procedures variables actually work the way you intended.

38. Go to *Operations > Tickets*.

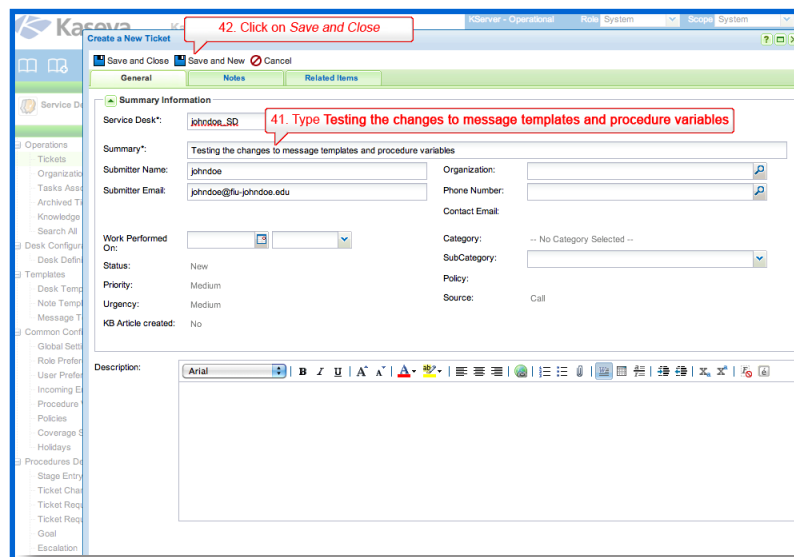
39. Click on *New*

40. Click on *New Ticket*.



41. Type **Testing the changes to message templates and procedure variables**. In the *Summary* text box.

42. Click on *Save and Close*.

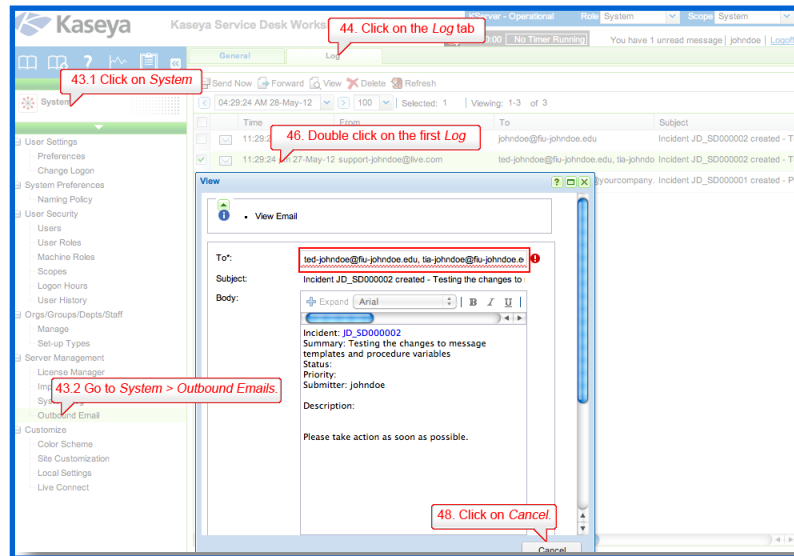


- Review the Outbound Emails.

43. Go to *System > Outbound Emails*.

44. Click on the *Log* tab on the right pane.

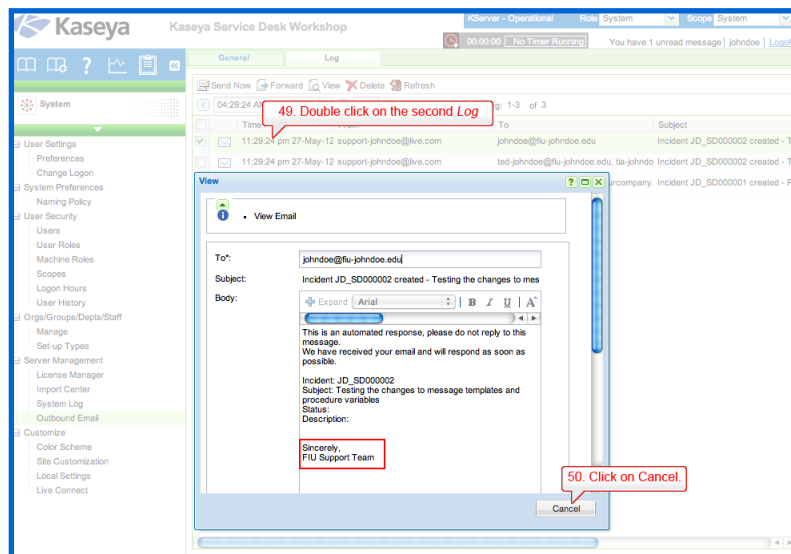
45. Find the two emails sent out with <INITIALS>_SD000002 included in the subject line.
46. Double click on the first one.
47. Observe that the *To* field is set to **ted-johndoe@fiu-johndoe.edu, tia-johndoe@fiu-johndoe.edu, tim-johndoe@fiu-johndoe.edu, tod-johndoe@fiu-johndoe.edu, tom-johndoe@fiu-johndoe.edu, tru-johndoe@fiu-johndoe.edu**.
48. Click on *Cancel*.



49. Double click on the second email.

-Observe ~ticaid in the *Subject* and *Sincerely, FIU Support Team*

50. Click on *Cancel*.



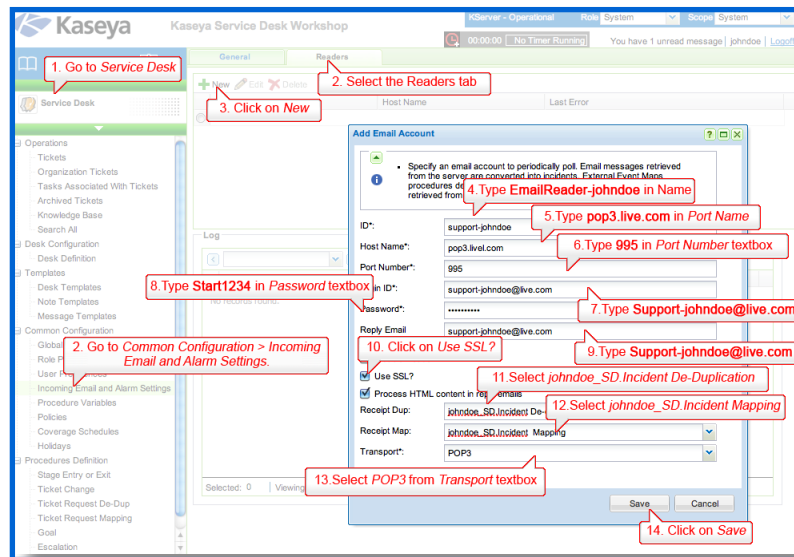
Part 7

Incoming Emails, Alarm Settings, and their linked service desk procedures determine how email requests are processed into tickets, what service desks they belong to, and whether ticket requests are canceled. An email reader acts as a communication hub between end user and your support team. It supports both POP3 and IMAP. It can receive plain or HTML formatted email, with or without attachments, and adds the contents to the ticketing system. RTF formatted emails are not supported.

Now that your service desk has gone through its initial set up, you would like to reduce your team's workload by automatically creating tickets from emails sent by the end users. Also, any follow up emails, replying to the ticket creation acknowledgement should not create a new ticket. It should just be added as a note to the original email. Setup a POP3 or IMAP support email account to receive request from the end users. Then set up your VSA to read the request emails and create tickets correspondingly. Lastly, make sure any follow-up email would not create a new ticket.

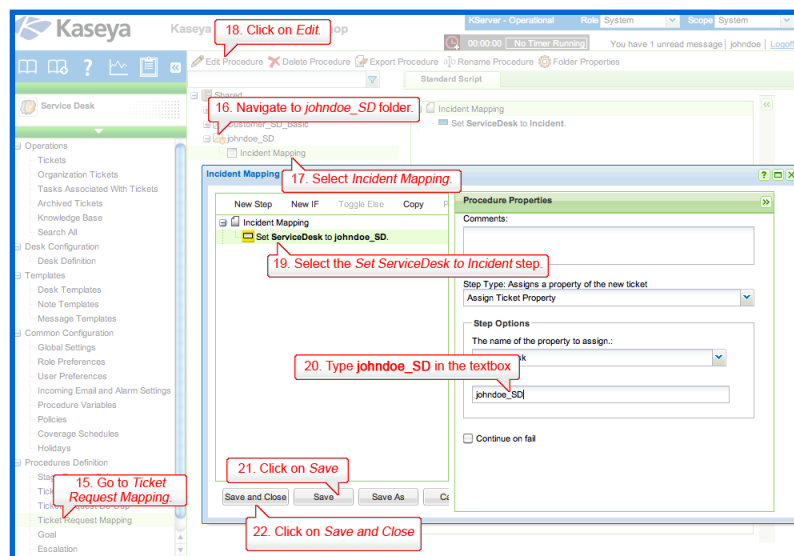
-Setup your Email Reader.

1. Go to *Common Configuration > Incoming Email and Alarm Settings*.
2. Select the *Readers* tab
3. Click on *New*.
4. Type *EmailReader-<USERNAME>* in the *ID* text box.
5. Type the POP3/IMAP server address (e.g., *pop3.live.com* for live accounts) in the *Host Name* text box.
6. Type the port number (e.g., 995 for live with SSL) for your POP3/IMAP server in the *Port Number* text box.
7. Type your email address in the *Login ID* text box.
8. Type your email account password in the *Password* text box.
9. Type your email address in the *Reply Email Address* text box.
10. Select the *Use SSL?* Checkbox, if your email server requires it.
11. Select *<USERNAME>_SD.Incident De-Duplication* for *Receipt Dup*.
12. Select *<USERNAME>_SD.Incident Mapping* for *Receipt Map*.
13. Select *POP3* or *IMAP* for *Transport* protocol.
14. Click on *Save*.



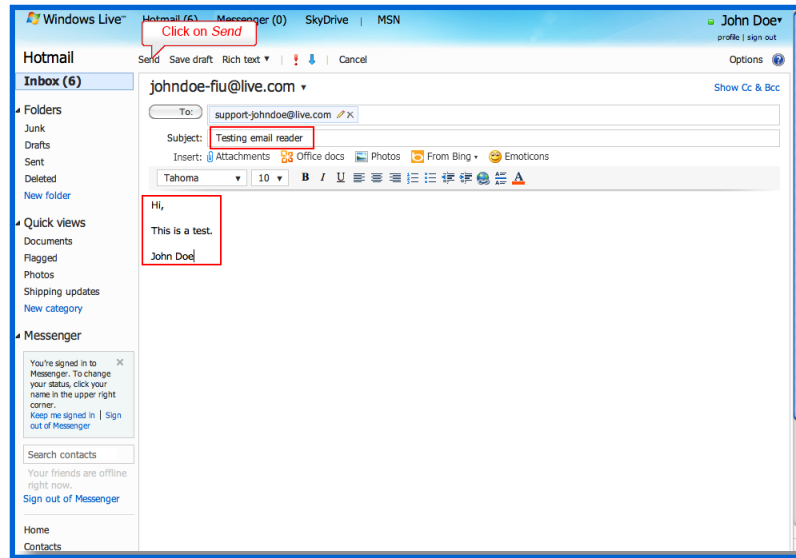
- Set the attributes of a ticket request.

15. Go to *Procedure Definition > Ticket Request Mapping*.
16. Navigate to <USERNAME>_SD folder.
17. Select *Incident Mapping*.
18. Click on *Edit*.
19. Select the *Set ServiceDesk to <USERNAME>_SD* step.
20. Make sure that <USERNAME>_SD is entered in the right pane.
21. Click on *Save*.
22. Click on *Save and Close*.



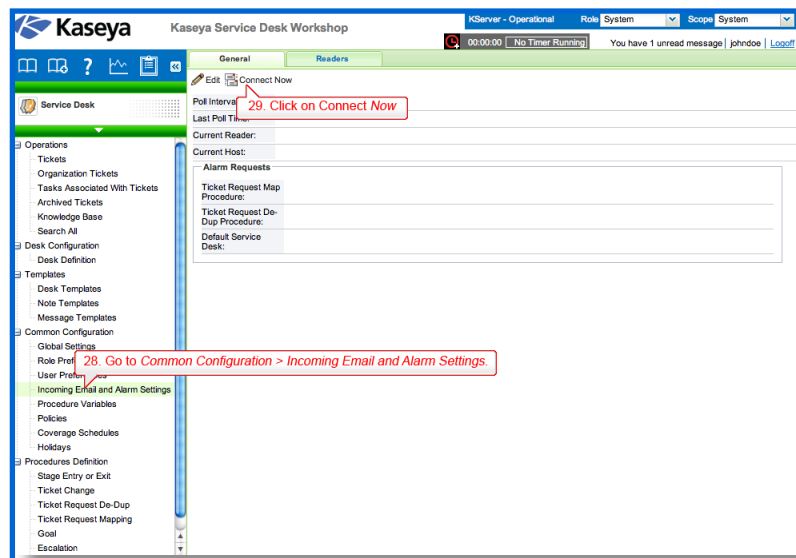
- Now you need to make sure that the newly created email reader works as you intended.

23. Go to your email account
24. Compose a new email.
25. Type the email reader account address in the *To* field
26. Type some meaningful text in the *Subject* and *Body* of your email.
27. Send your email.



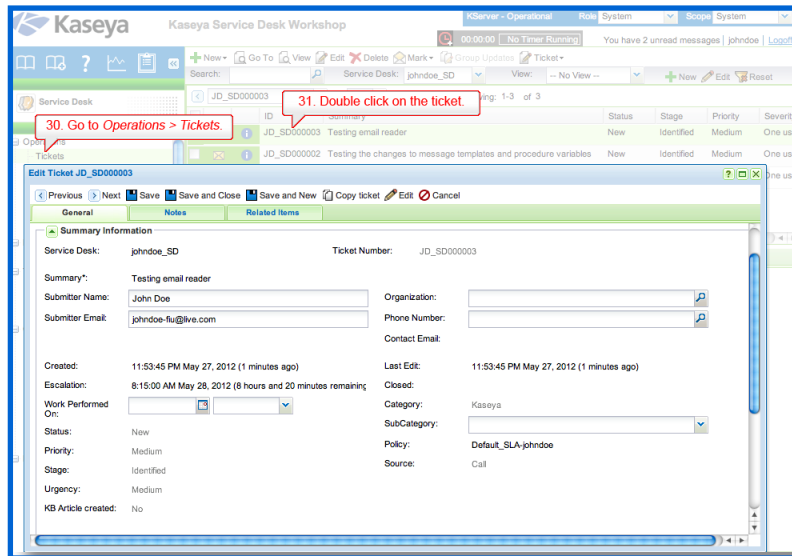
- You can manually force the email reader to check the email readers.

28. Go to *Common Configuration > Incoming Email and Alarm Settings*.
29. Click on the *Connect Now*.



-Verify the Submission of the Ticket Creation Acknowledgement.

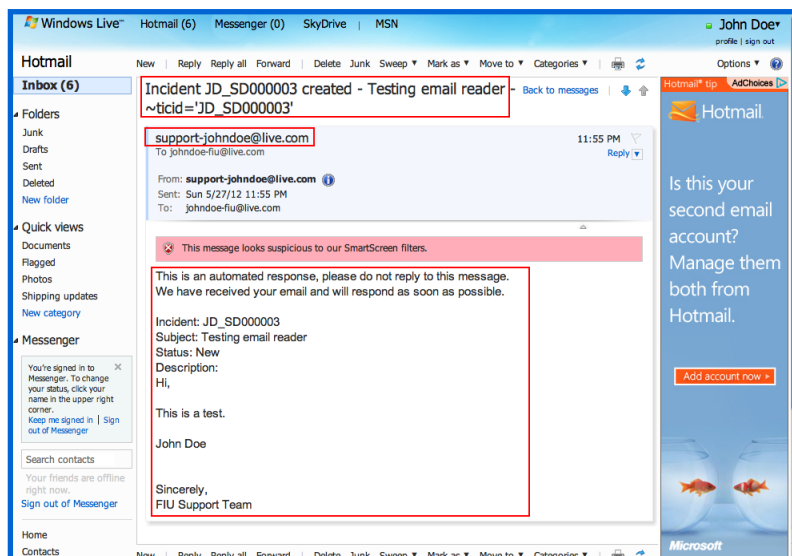
30. Go to *Operations > Tickets*.
31. Find your newly created ticket and double click on it.
32. Review the content of the ticket
33. Click on *Cancel*.



-To check if the ticket creation acknowledgement was sent out.

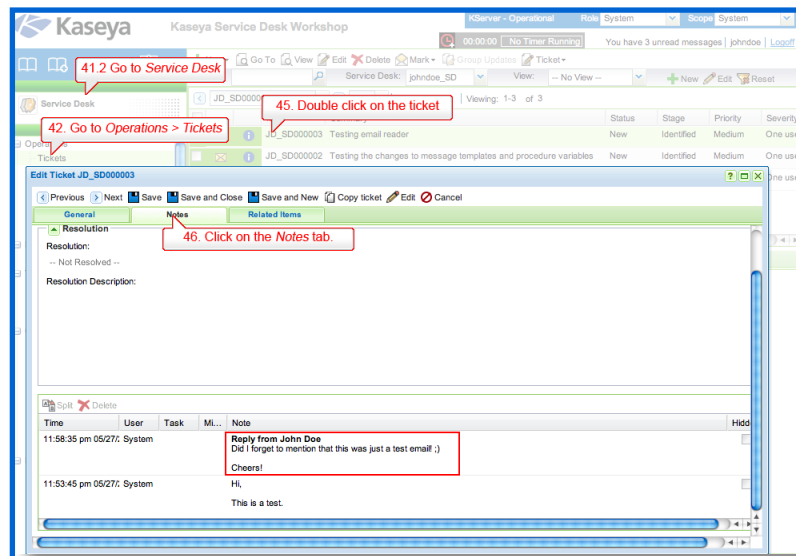
34. Go to *System > Outbound Emails*.
35. Click on the *Log* tab on the right pane.
36. Find the notification emails with subject including your ticket number.
37. Review the contents of the acknowledgement email.
38. Go to your email account and verify the receipt of the ticket creation acknowledgement email.

Fig. 6.9



-Now Send a Follow-Up Email.

39. Go to your email account.
40. Find the ticket creation acknowledgement email for your newly created ticket.
41. Note that *~tictid* is included in the subject.
42. Reply to that email.
43. Go to *Operations > Tickets*.
44. Find the ticket that was automatically created by the email reader.
45. Double click on the ticket.
46. Click on the *Notes* tab.
47. Notice that the contents of the reply email is added as a note to the original email.
48. Click on *Cancel*.

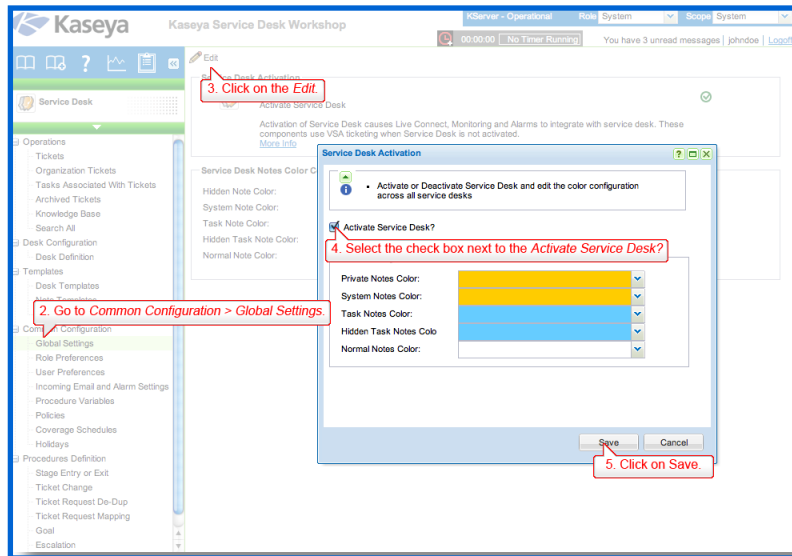


Part 8

You noticed that tickets created by end users using *Live Connect* or *Access Portal* are not received in your newly created service desk. You realized that you have not yet activated your service desk. Now that you are confident about your service desk to work properly as you intended, it is time to activate it so that all the tickets created by end users, *Monitors*, and *Alarms* go to your desk.

1. Open *Service Desk*
2. Go to *Common Configuration > Global Settings*.
3. Click on the *Edit* button on the right pane.
4. Select the check box next to the *Activate Service Desk?*

5. Click on **Save**.
6. Go to **Common Configuration > Incoming Email and Alarm Settings**.
7. Make sure that the **Enable** button on the top of the right pane is grayed out, meaning that is selected.



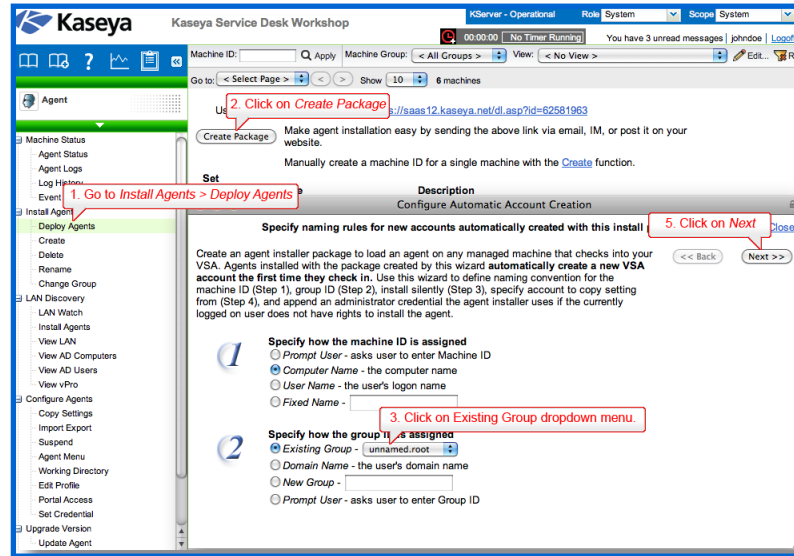
Note: Step 7 is required only for the on-premise KServers.



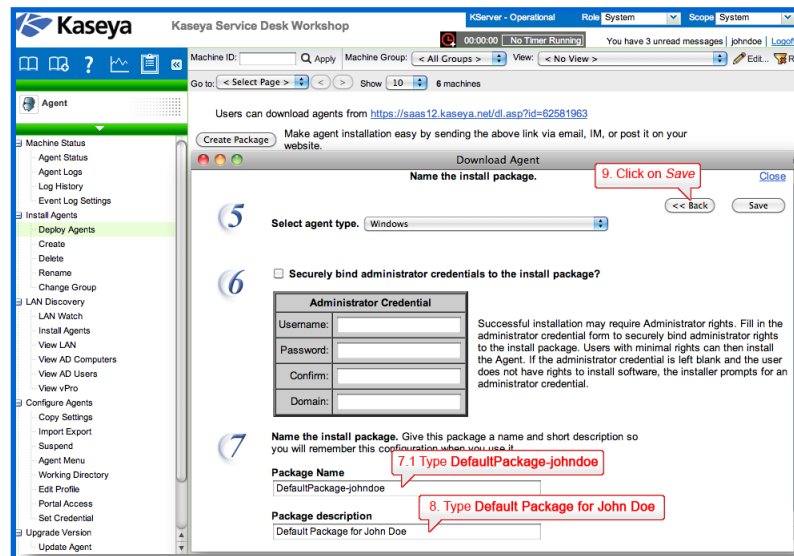
Part 9

Now that your desk is created and activated, it is time to create machine users. To be able to create machine users you first need to deploy agents to the machines being used by the users. Next, you can ask the machine users to enter their profile information; alternatively, you can do this on their behalf.

1. Go to **Install Agents > Deploy Agents**
2. Click on **Create Package**
3. Click on **Existing Group** dropdown menu.
4. Select **FIU-johndoe.mr**.
5. Click on **Next**.



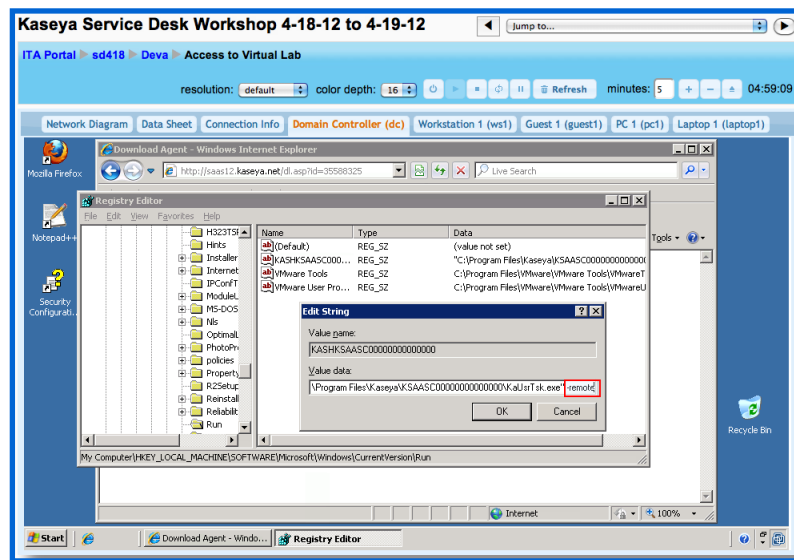
6. Type **DefaultPackage-<USERNAME>** in *Package Name* textbox.
7. Type **Default Package for <FIRSTNAME> <LASTNAME>** in *Package Description* textbox.
8. Click on Save.



9. Remotely login to DC machine.
10. Login to VSA and Click on *DefaultPackage-johndoe*.
11. Click on *DefaultPackage-johndoe* link.
12. Click on Save
13. Open *KcsSetup* file.
14. Run the Setup file.

- Now that we have successfully installed agent on DC machine, we need to change a registry key value in order to have the Kaseya icon showing in the tray

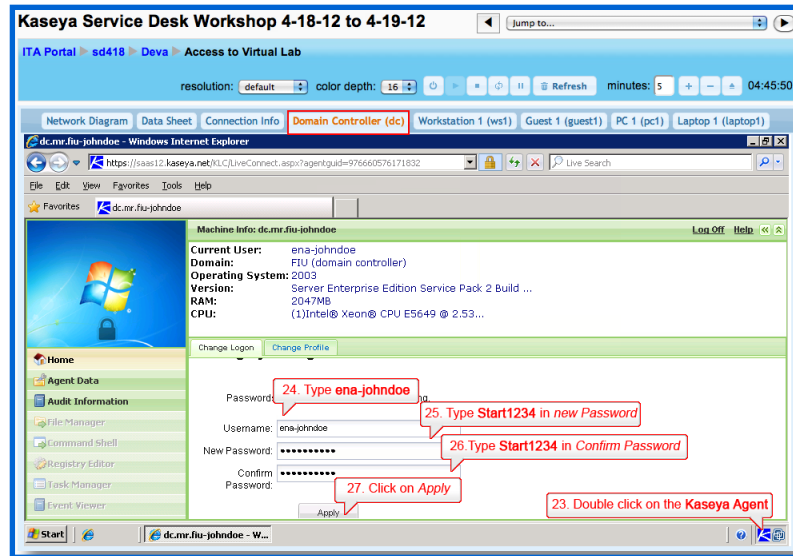
15. Click on **Run** in the start menu of the windows.
16. Type **Regedit** in the *Open* textbox.
17. Click on *OK*.
18. Navigate to *My Computer > HKEY_LOCAL_MACHINE> SOFTWARE > Microsoft > Windows > CurrentVersion > Run*.
19. Double Click on *Kaseya* value.
20. Append - **remote** at the end and click on *OK*.
21. Close out of the *Registry Editor*.



-Repeat the previous steps until you install agents on all of the machines.

- To improve communication, you want to make sure that end users have updated their profile; therefore, you ask them to double click on the Kaseya agent icon in their system tray bar and update their profile. **Eli**, **Ena**, **Eve**, **Evy**, and **Ewa** are the end users of ws1, dc, guest1, pc1, and laptop1, respectively.

22. While remotely logged into the DC machine double click on the Kaseya Agent.
23. Type **ena-johndoe** in the *Username* textbox
24. Type **Start1234** in the *Password* textbox.
25. Type **Start1234** in the *Confirm Password* textbox.
26. Click on *Apply*.
27. Click on *Ok*.



28. Go to *Configure Agents > Edit Profiles*.

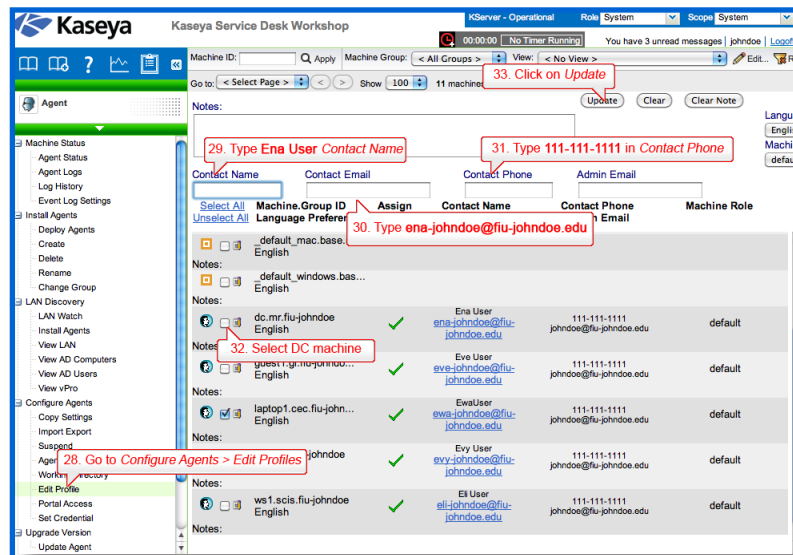
29. Type **Ena User** in the *Contact Name* textbox.

30. Type **ena-johndoe@fiu-johndoe.edu** in *Contact Email* textbox.

31. Type **111-111-1111** in *Contact Phone*.

32. Select DC machine.

33. Click on *Update*.



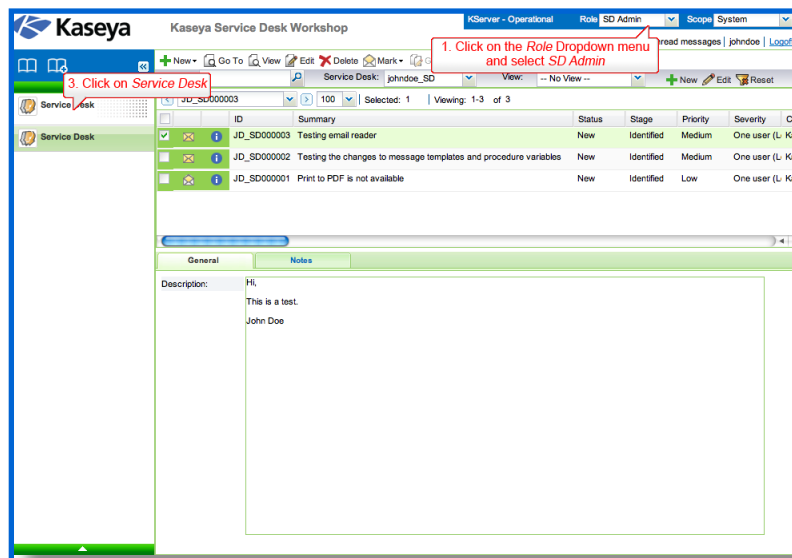
-Repeat the steps from 21 - 32 until you add Contact information for each of the machines.

Part 10

Now that have identified the types of your SD users, it is time to clearly define their access to the VSA functions, tickets, and ticket fields. Also, you need to further divide your SD Techs to different support tiers to better utilize their skill sets.

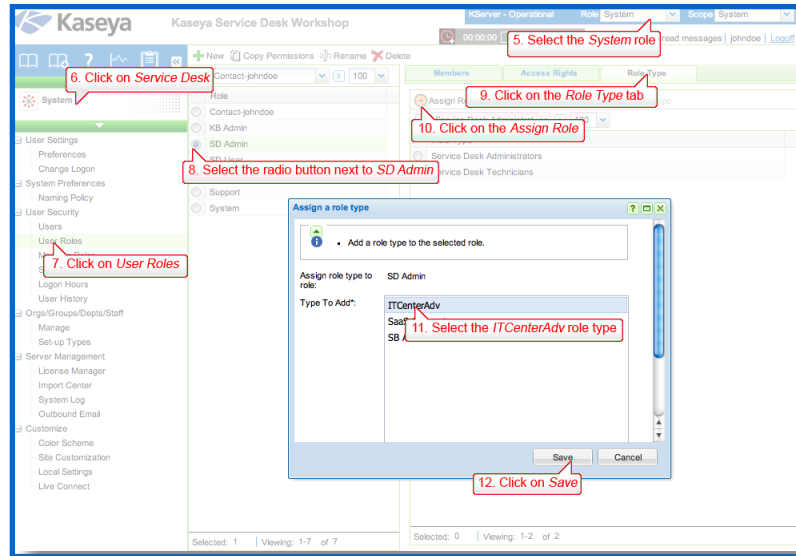
For each of the four SD Users type, you need to clearly define their VSA function access.

1. Click on the *Role* dropdown box.
2. Select the *SD Admin* role.
3. Click on the *Service Desk* module listed in the left pane.
4. Observe that SD admin can only access the *Service Desk* module.



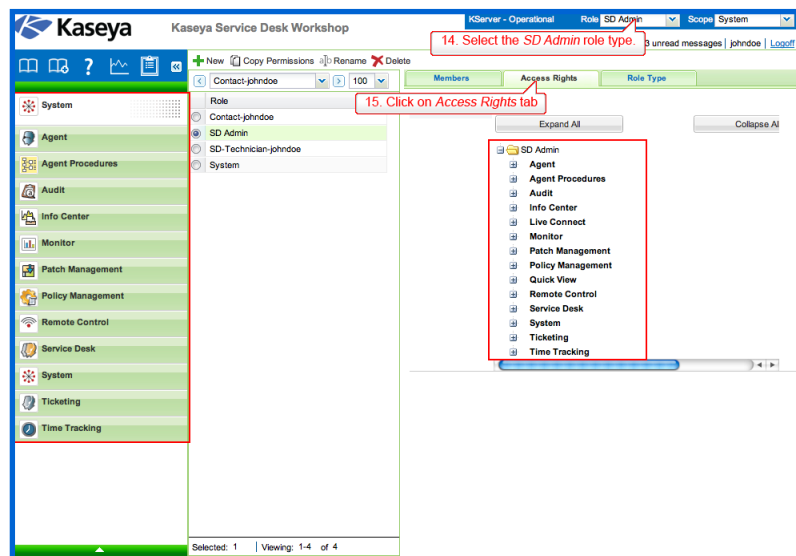
-You would like your SD Admins to be able to have full access to all the functions in your VSA. To grant Master or System access to SD Admins, follow the below steps:

5. Click on the *Role* dropdown box.
6. Select the *System* role (or the *Master* role for on-premise users).
7. Go to *System > User Roles*.
8. Select the *SD Admin* user role in the middle pane.
9. Click on the *Role Type* tab in the right pane.
10. Click on the *Assign Role Type* button.
11. Select the *ITCenterAdv* role type (or *VSA Admin* role type for on-premise users).
12. Click on *Save*.



- Verify Changes to SD Admin.

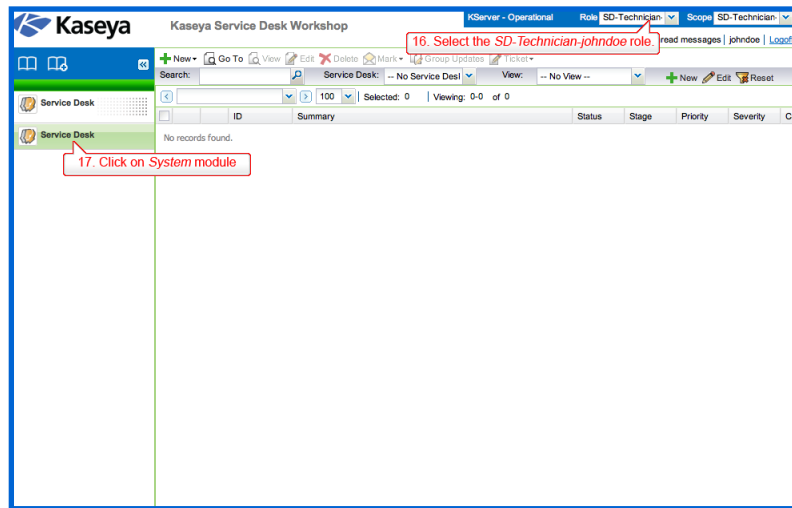
13. Click on the *Role* dropdown box.
14. Select the *SD Admin* role type.
15. Click on the *Access Rights* tab on the left side of the *Role Type* tab.
16. Make sure that all the modules are included in the list.
17. Click on the *System* menu item in the left pane.
18. Make sure that all the modules are included in the list.



- Check the functions a SD technician has access to.

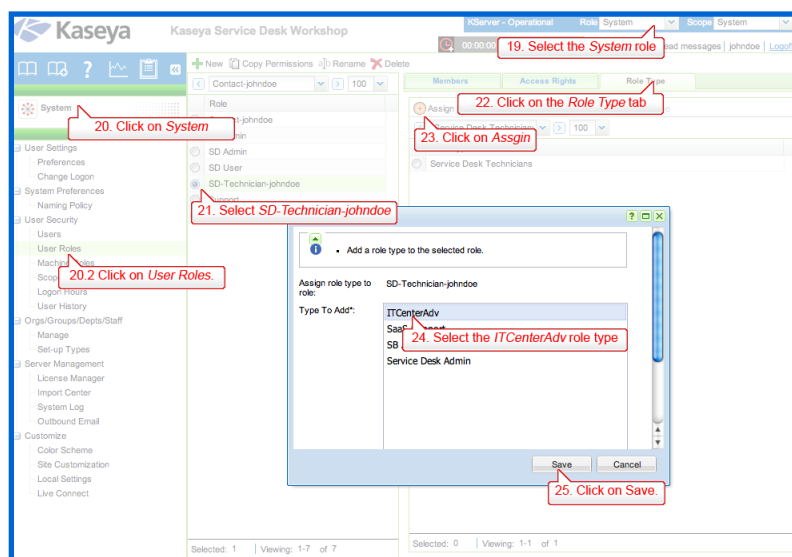
19. Click on the *Role* dropdown box.
20. Select the *SD-Technician-<USERNAME>* role.

21. Click on the *Service Desk* module listed in the left pane.
22. Observe SD technician can only access the *Service Desk* module



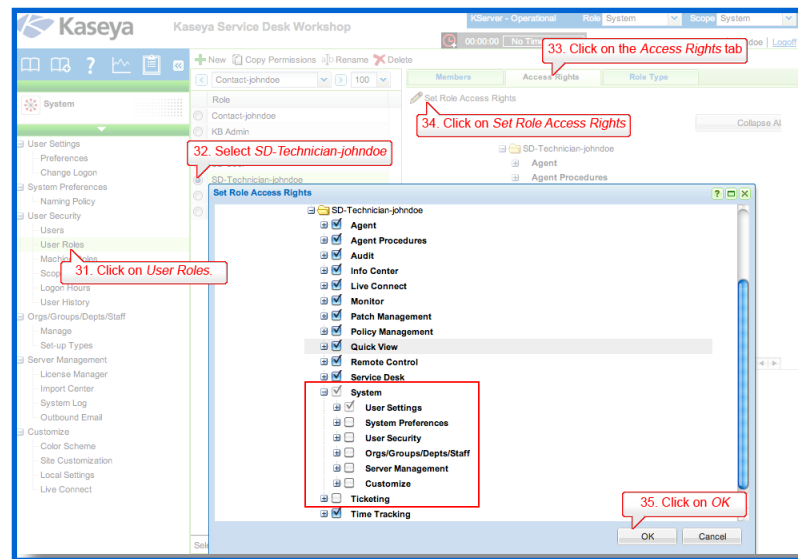
- You would like your SD technicians to be able to have access to most of the functions in your VSA. To grant access to different VSA modules to SD technicians, follow the below steps:

23. Click on the *Role* dropdown box.
24. Select the *System* role (or the *Master* role for on-premise users).
25. Go to *System > User Roles*.
26. Select the *SD-Technician-<USERNAME>* user role in the middle pane.
27. Click on the *Role Type* tab in the right pane.
28. Click on the *Assign Role Type* button.
29. Select the *ITCenterAdv* role type (or the *VSA Admin* role type for on-premise users).
30. Click on *Save*.



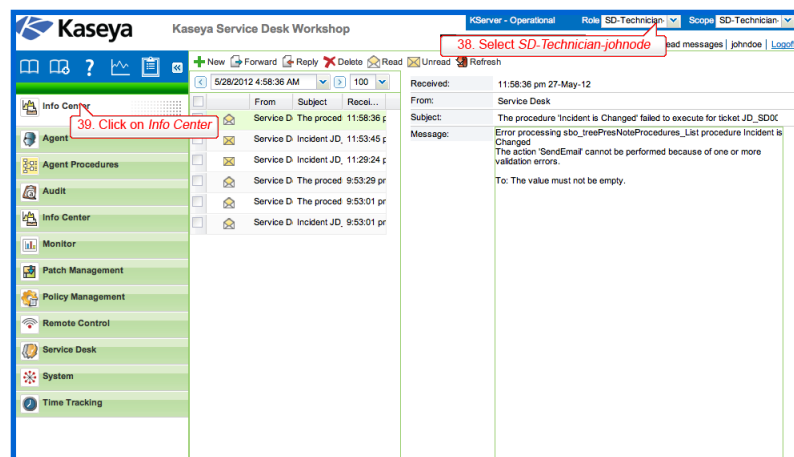
Unlike SD Admins who should be able to access all the VSA functions, you do not want your SD technicians to access System and Ticketing functions.

31. Go to *System > User Roles*.
32. Select the *SD-Technician-<USERNAME>* user role in the middle pane.
33. Click on the *Access Rights* tab in the right pane.
34. Click on the *Set Role Access Rights* button.
35. Uncheck the *Ticketing* and most of the *System* functions, except for *System > User Settings*.
36. Click OK.

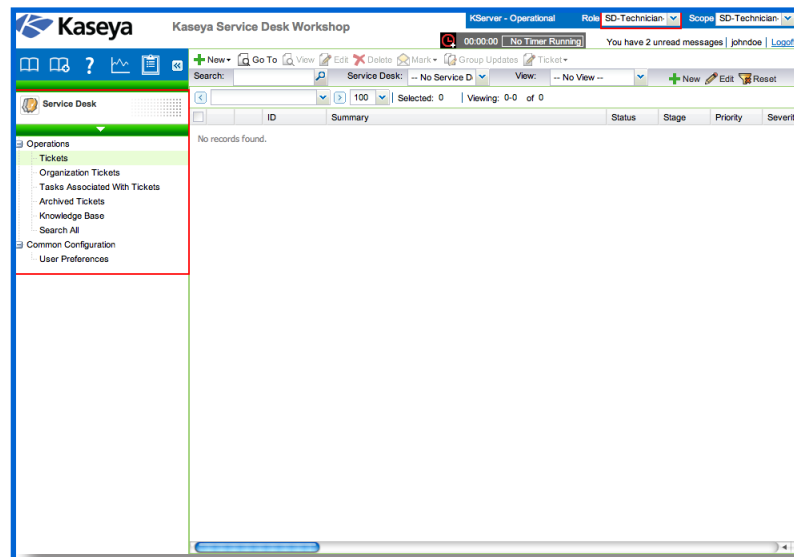


- To verify that your SD technician can access the VSA functions that you intended, follow the below steps:

37. Click on the *Role* dropdown box.
38. Select the *SD-Technician-<USERNAME>* role type.
39. Click on the *Info Center* menu item in the left pane.
40. Make sure that all the modules that you intended are included in the list; Note that *Ticketing* is not included.



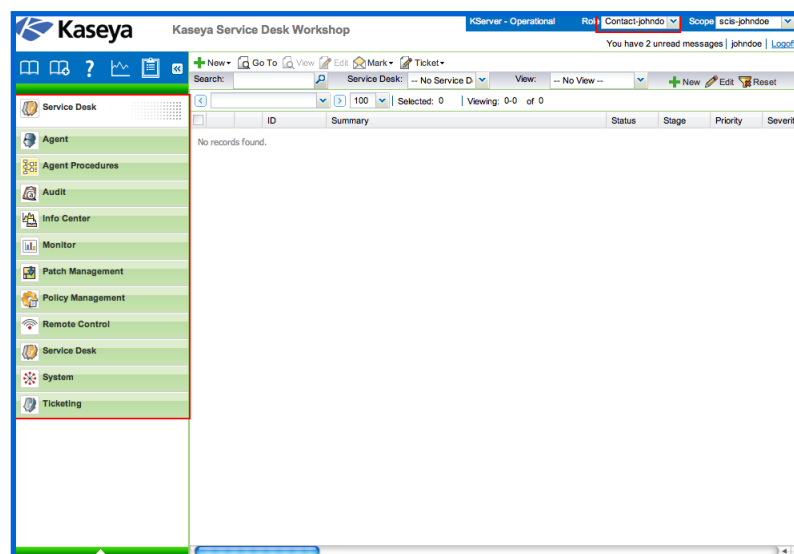
41. Next, click on the *System* module.
42. Note that only *User Settings* is available.



43. Next, go to the *Service Desk* module.
44. Note that none of the *SD Admin* functions are available.

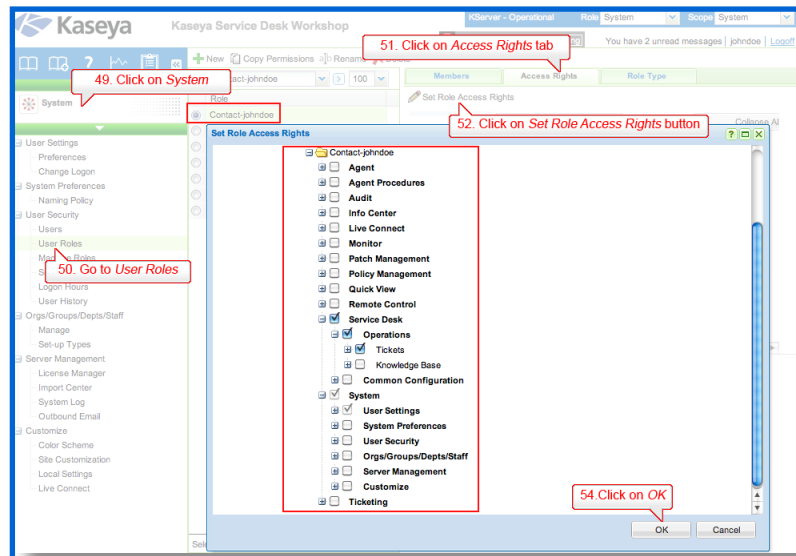
- To check the functions that an end user contact has access to, you can either login to VSA using an end user contact username, or you can simply change your role, using the *Role* dropdown box located on the top-right corner of all VSA pages.

45. Click on the *Role* dropdown box.
46. Select the *Contact-<USERNAME>* role.
47. Click on the *Service Desk* module listed in the left pane.
48. Observe that an end user contact has too much access to the VSA functions.



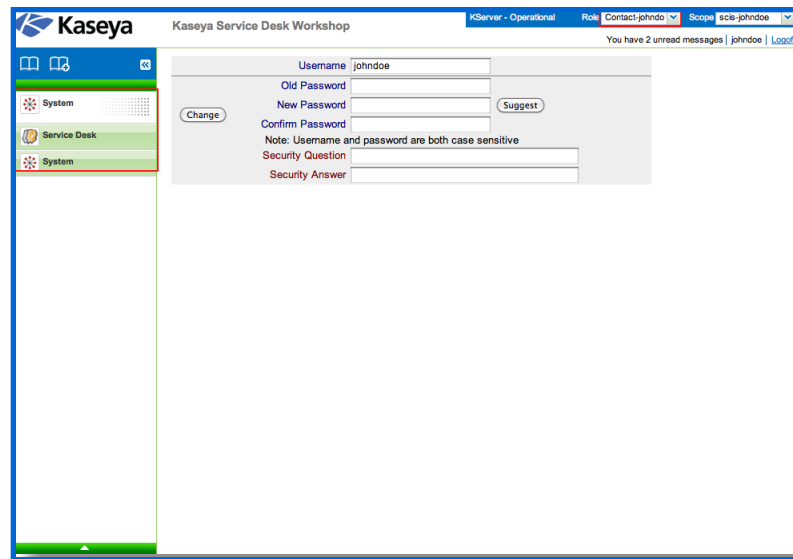
Unlike SD Admins and technicians, end user contacts should have access only to the tickets.

49. Go *System > User Roles*.
50. Select the *System Contact-<USERNAME>* user role in the middle pane.
51. Click on the *Access Rights* tab in the right pane.
52. Click on the *Set Role Access Rights* button.
53. Uncheck everything, except for the *Service Desk > Tickets* and *System > User Settings*.
54. Click OK.

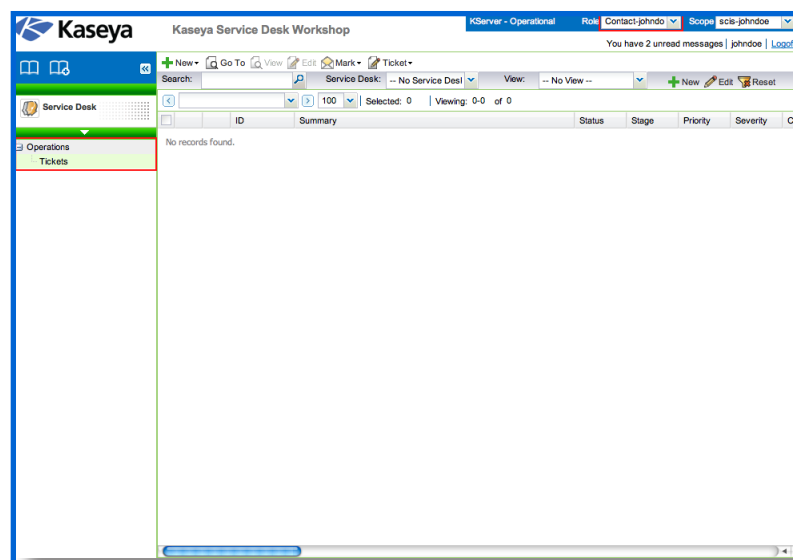


To verify that your end user contacts can access the limited VSA functions that you intended, follow the below steps.

55. Click on the *Role* dropdown box.
56. Select the *Contact-<USERNAME>* role type.
57. Click on the *System* menu item in the left pane.
58. Make sure that only *System* and *Service Desk* are included in the list.



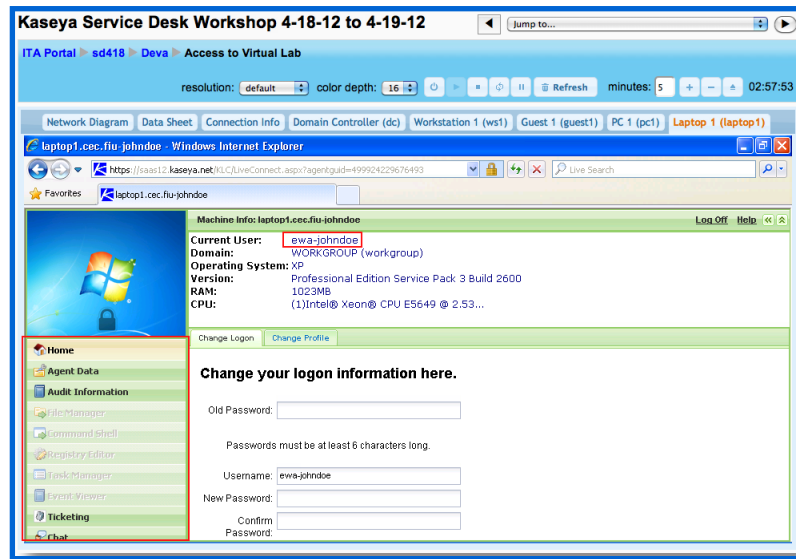
59. Next, click on the *System* module.
60. Note that only *User Settings* and *Database Views* are available.
61. Next, go to the *Service Desk* module.
62. Note that only *Tickets* function is available.



By default all machines are members of the *default* machine role. You can set machine users' access to VSA functions via Access Portal by modifying the access right for the *default* machine role. To check what functions a machine user has access to, you can either login to VSA using an end user contact username, or you can simply remote login to one of an end user's machine and double click on the Kaseya agent icon in the system tray

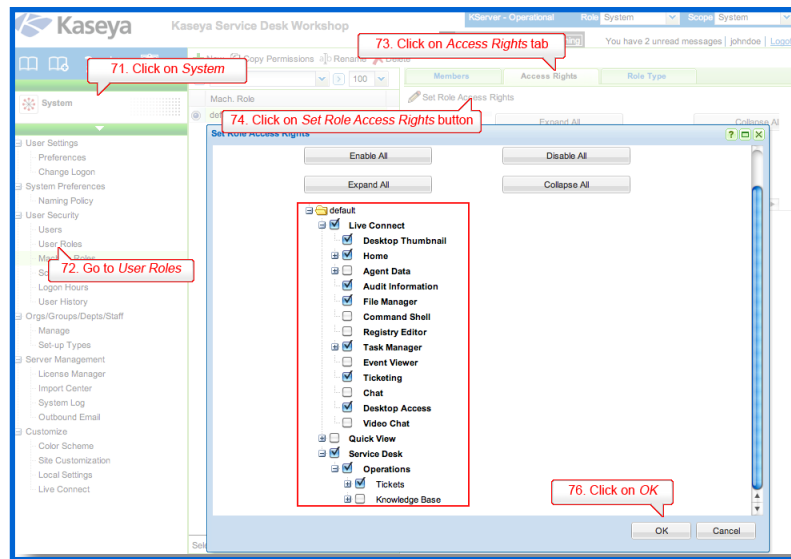
63. Open an IE browser.
64. Go to your Kaseya server.

65. Login to VSA using the *laptop1* machine user credentials (i.e., *ewa-<USERNAME>*).
66. Note that too many functions are available to the machine user.
67. Alternatively, remote login to *laptop1*.
68. Double click on the Kaseya agent icon in the system tray.
69. Note that there are too many functions available to the machine user. Some functions such as *Desktop Access* are grays out as it does not make sense to use them while logged in to the machine.
70. Observe that a machine user has too much access to the VSA functions by default.



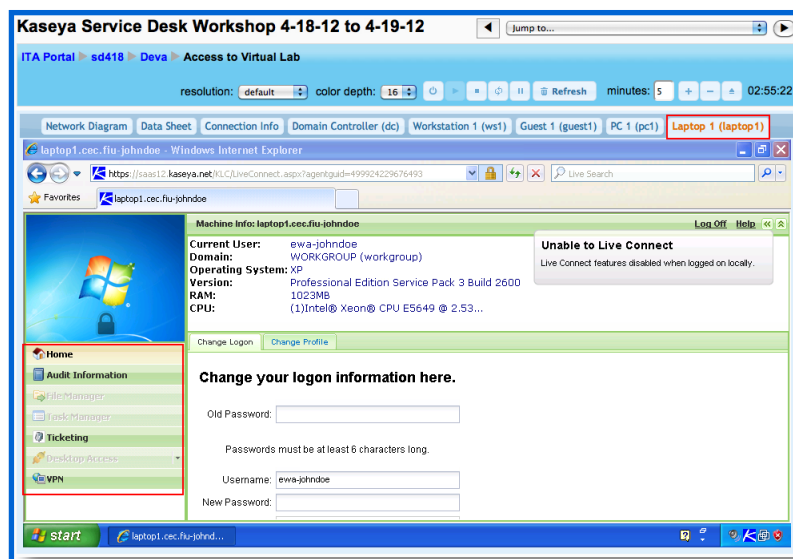
Unlike SD Admins and technicians, machine users should have access only to a limited number of functions on VSA.

71. Go to *System > Machine Roles*.
72. Select the *default* user role in the middle pane.
73. Click on the *Access Rights* tab in the right pane.
74. Click on the *Set Role Access Rights* button.
75. Uncheck everything, except for *Service Desk > Tickets* and some useful functions appropriate for the machine user under *Live Connect*.
76. Click *OK*.



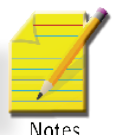
To verify that your machine users can access the limited VSA functions that you intended, follow the below steps.

77. Remote login to *laptop1*.
78. Double click on the Kaseya agent icon in the system tray.
79. Make sure that only the intended functions are available.



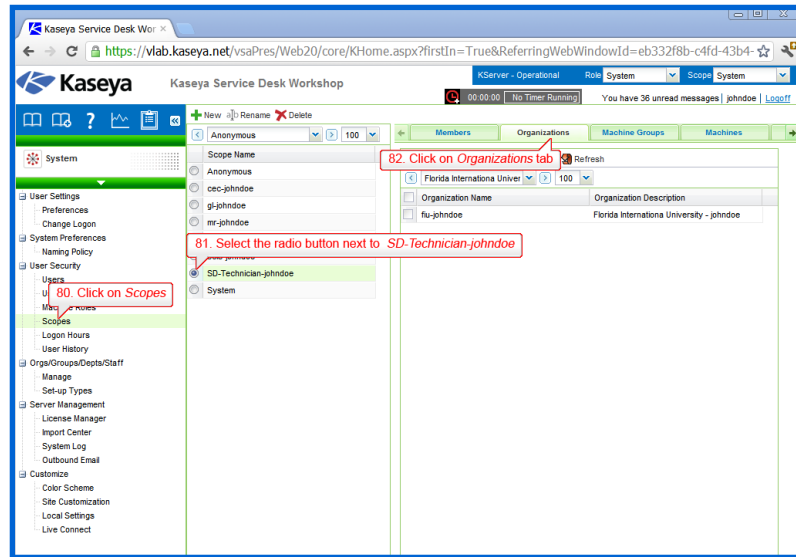
For each of the four SD Users type, you need to clearly define their scopes. You decide to give your SD Admins Master / System scope.

Note: Master / System scopes are predefined in VSA. Therefore, there is no need for creating a new scope for SD Admins.



Your service desk technicians would need to have access to all the objects in the *FIU-<USERNAME>* organization.

80. Go to *User Security > Scopes*.
81. Select the radio button next to *SD-Technician-johndoe*.
82. Click on *Organizations* tab.



Notes

Note: For your convenience, the required scope has already been created for you and the FIU-johndoe organization has already been assigned to it.

Verify that your service desk end user contacts from SCIS, MR, GL, and CEC have access to all the machines in their respective departments.

83. Select the radio button next to *scis-johndoe*.
84. Click on *Machine Groups* tab.
85. Select the radio button next to *mr-johndoe*.
86. Select the radio button next to *gl-johndoe*.
87. Select the radio button next to *cec-johndoe*.



Notes

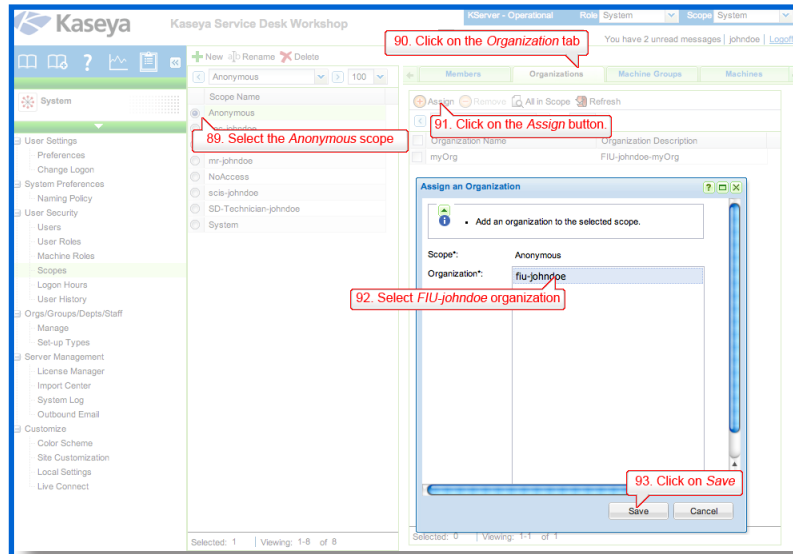
Note: For your convenience, the required scopes have already been created for you and the corresponding machine groups have already been assigned to them.

By default all machine users use the *Anonymous* scope when using Access Portal. Assign the organization and/or Machine Groups that you want to give access to your machine users. Without this setting machine users will not be able to edit their own tickets. Note that you must assign all organizations to this scope in order for the machine users to view tickets via Access Portal.

88. Go to *System > Scopes*.
89. Select the *Anonymous* scope in the middle pane.
90. Click on the *Organization* tab in the right pane.
91. Click on the *Assign* button.

92. Select the *FIU-<USERNAME>* organization.

93. Click on **Save**.



Associate the scopes to your service desk.

94. Go to **System > Scopes**.

95. Select the *SD-Technician-<USERNAME>* scope in the middle pane.

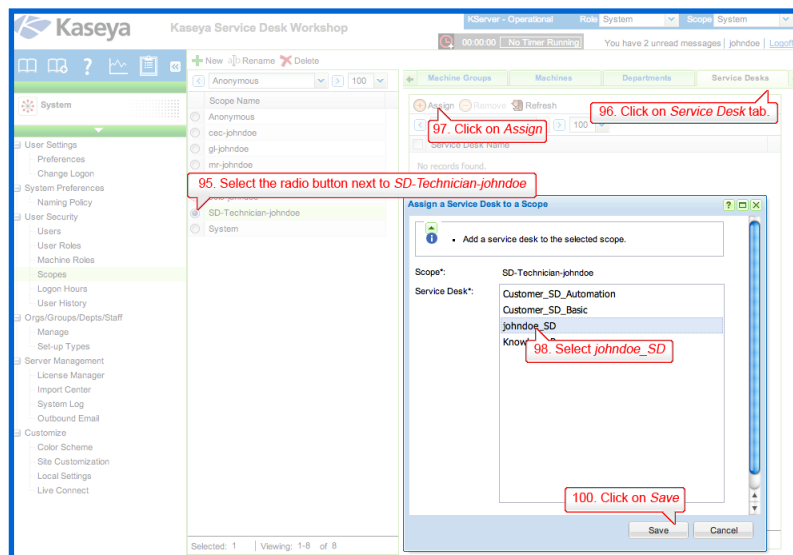
96. Click on the **Service Desk** tab in the right pane.

97. Click on the **Assign** button.

98. Select the *FIU-<USERNAME>* organization.

99. Click on **Save**.

100. Repeat steps 95 to 100 for the *scis-<USERNAME>*, *mr-<USERNAME>*, *gl-<USERNAME>*, *cec-<USERNAME>*, and *Anonymous*.





Notes

You need to assign the actual members of each of the SD users' types to their corresponding scopes.

Note: You have already assigned the actual users to their corresponding scopes. In the next steps, we just verify the assignments.

101. Select the radio button next to *System* scope.
102. Click on *Members* tab.
103. Select the radio button next to *SD-Technician-johndoe*.
104. Select the radio button next to *scis-johndoe*.
105. Select the radio button next to *mr-johndoe*.
106. Select the radio button next to *gl-johndoe*.
107. Select the radio button next to *cec-johndoe*.



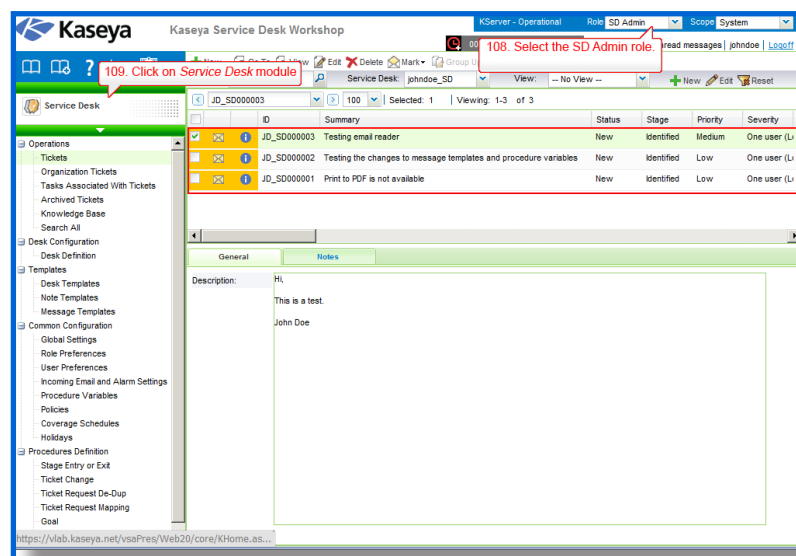
Notes

Note: The SD ticket access for machine users is determined by the Anonymous scope, which is predefined in VSA.

Now that all the required scopes are defined, associated to your desk, and assigned to the designated user types, it is time to verify that your SD users can access only the tickets related to them. For this, we use the tickets that have already been created in your desk. We start with SD Admins, then SD techs, then contacts, and finally the machine users.

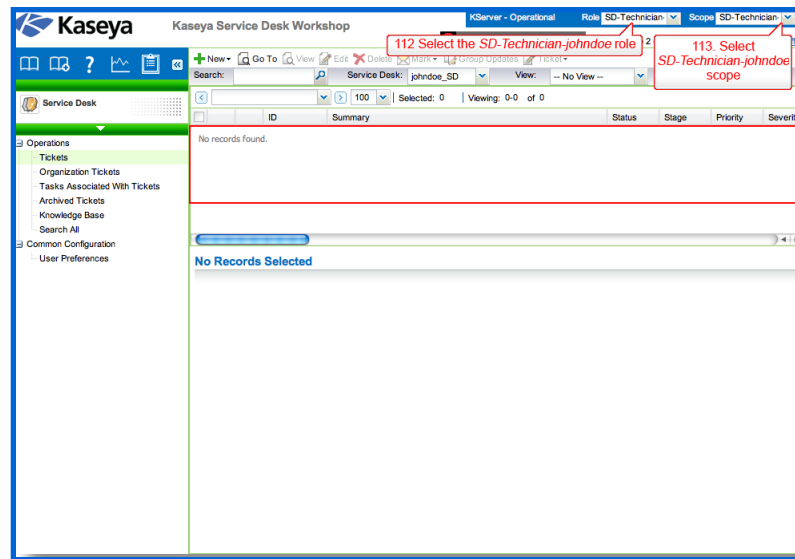
Verify the SD admins' ticket access.

108. Select the *SD Admin* role.
109. Select the *System/Master* scope.
110. Go to *Service Desk > Tickets*.
111. Observe that you can see all three tickets previously created in your desk.



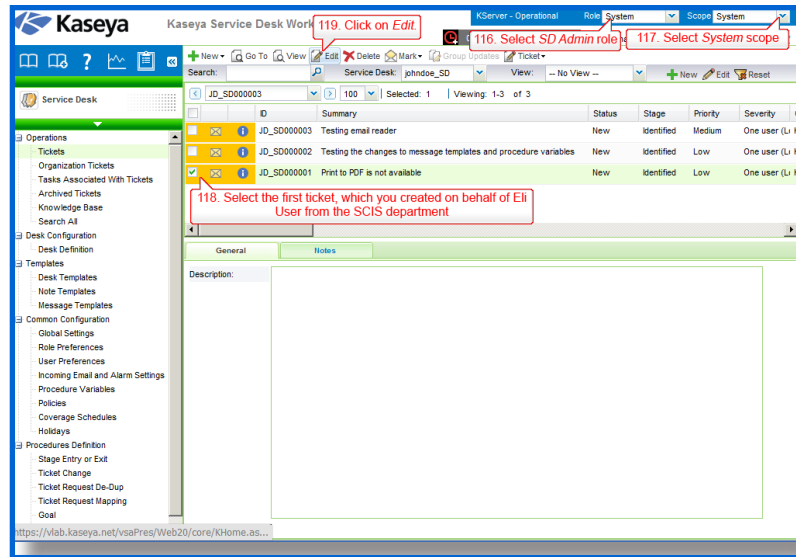
Verify the SD techs' ticket access.

112. Select the *SD-Technician-<USERNAME>* role.
113. Select the *SD-Technician-<USERNAME>* scope.
114. Go to *Service Desk > Tickets*.
115. Observe that you cannot see any of the three tickets previously created in your desk by the SD admin!

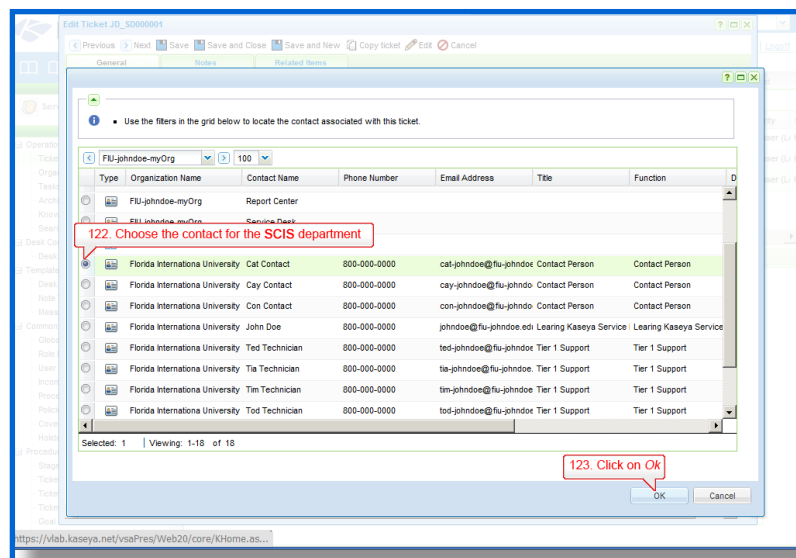


Add the organization and contact to your first ticket.

116. Select the *SD Admin* role.
117. Select the *System/Master* scope.
118. Go to *Service Desk > Tickets*.
119. Select the first ticket, which you created on behalf of Eli User from the SCIS department, in the right pane.
120. Click on *Edit*.

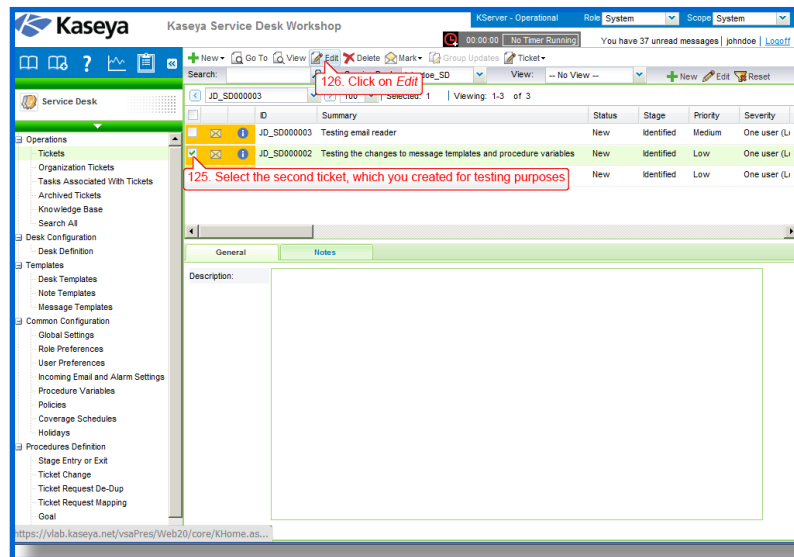


121. Click on the magnifying glass next to the *Organization* field.
122. Choose the contact for the SCIS department, namely, *Cat Contact*.
123. Click on *OK*.
124. Click on *Save and Close*.



Add the organization and contact to your second ticket.

125. Select the second ticket, which you created for testing purposes, in the right pane.
126. Click on *Edit*.

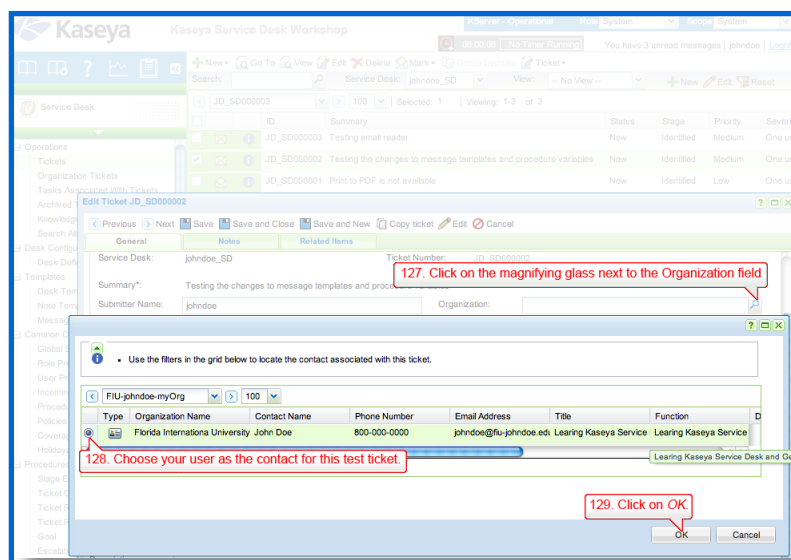


127. Click on the magnifying glass next to the *Organization* field.

128. Choose your user as the contact for this test ticket.

129. Click on OK.

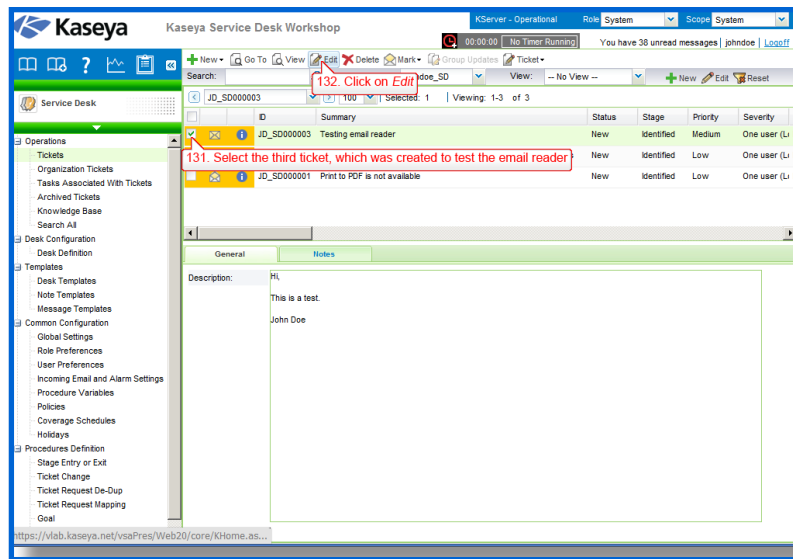
130. Click on *Save and Close*.



Add the organization and contact to your third ticket.

131. Select the third ticket, which was created to test the email reader, in the right pane.

132. Click on *Edit*.

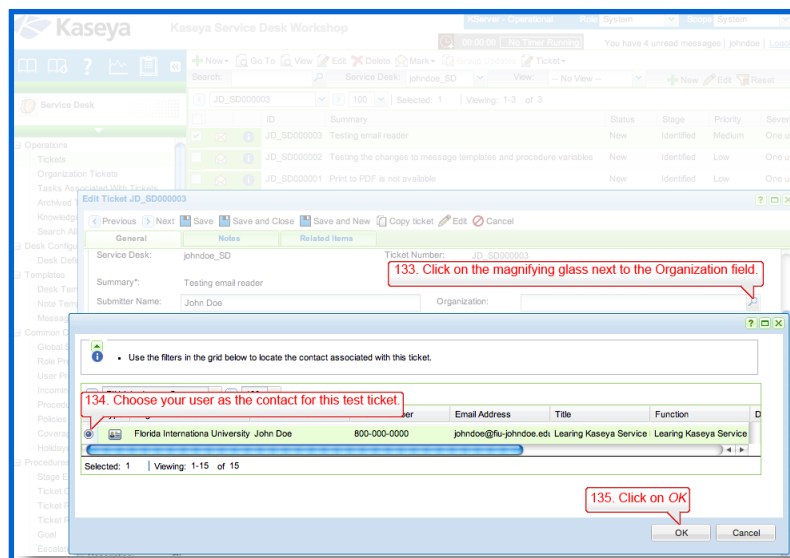


133. Click on the magnifying glass next to the *Organization* field.

134. Choose your user as the contact for this test ticket.

135. Click on *OK*.

136. Click on *Save and Close*.



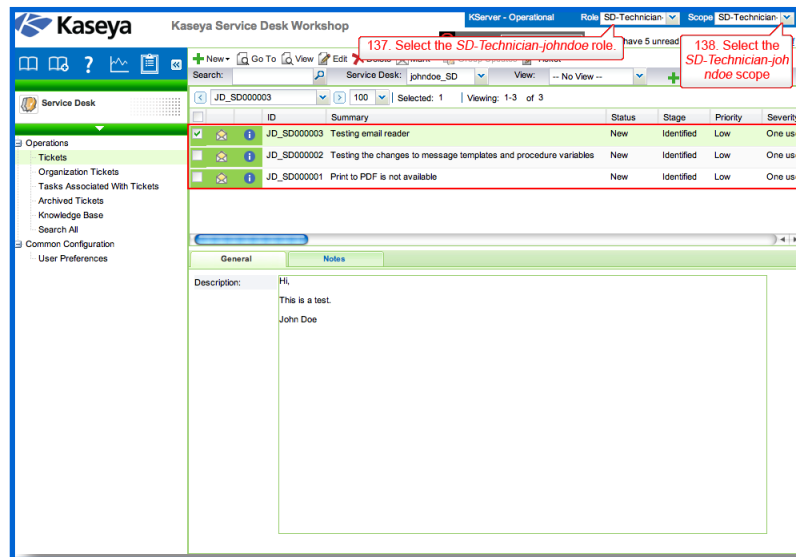
Verify the SD techs' ticket access.

137. Select the *SD-Technician-<USERNAME>* role.

138. Select the *SD-Technician-<USERNAME>* scope.

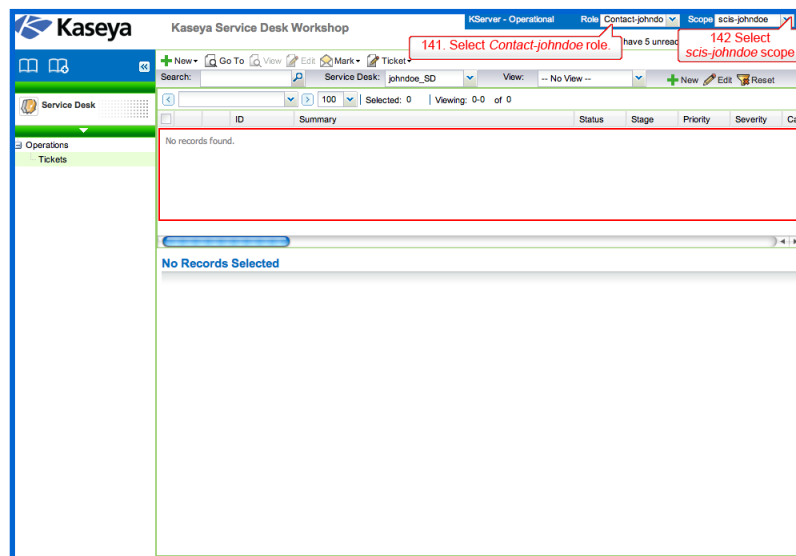
139. Go to *Service Desk > Tickets*.

140. Observe that now a SD tech can see all three tickets previously created in your desk by the SD admin. As all these three tickets are now associated with the *fiu-<USERNAME>* organization, therefore they are all accessible by the SD techs.



Verify the contacts' ticket access.

141. Select the *Contact-<USERNAME>* role.
142. Select the *scis-<USERNAME>* scope.
143. Go to *Service Desk > Tickets*.
144. Observe that the SCIS contact is not able to see any of the three previously created tickets, not even the one created on behalf of Eli, who is an end user from SCIS.

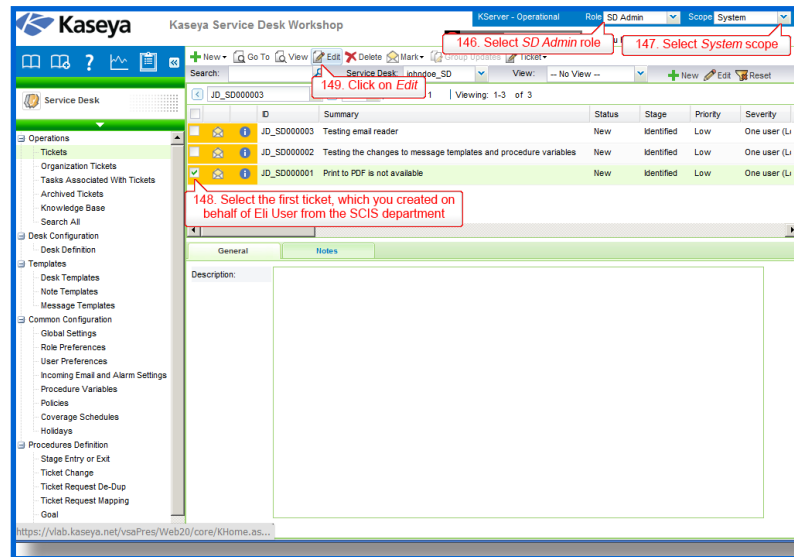


You remember that when you created the ticket on Eli's behalf, you did not specify that the machine belongs to the SCIS department. Specify the machine group in your first ticket.

145. Select the *SD Admin* role.
146. Select the *System/Master* scope.
147. Go to *Service Desk > Tickets*.

148. Select the first ticket, which you created on behalf of Eli User from the SCIS department, in the right pane.

149. Click on *Edit*.

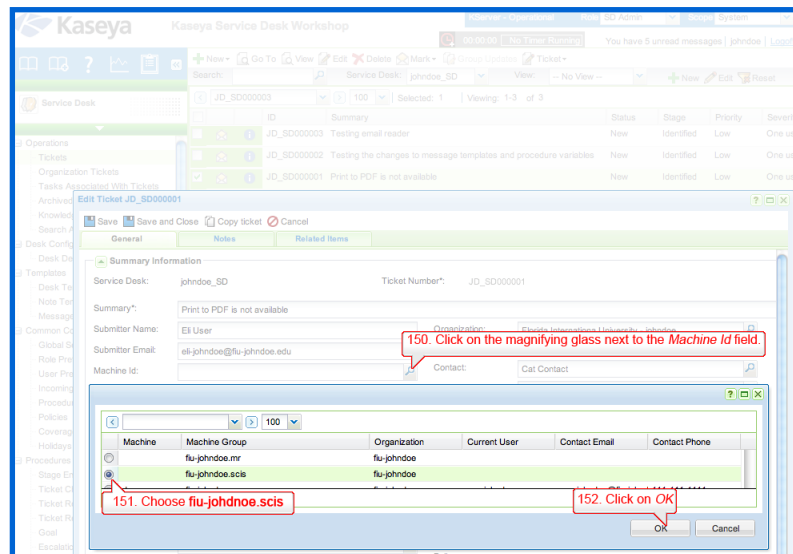


150. Click on the magnifying glass next to the *Machine Id* field.

151. Choose the SCIS machine group, namely, *flu-<USERNAME>.scis*.

152. Click on OK.

153. Click on *Save and Close*.



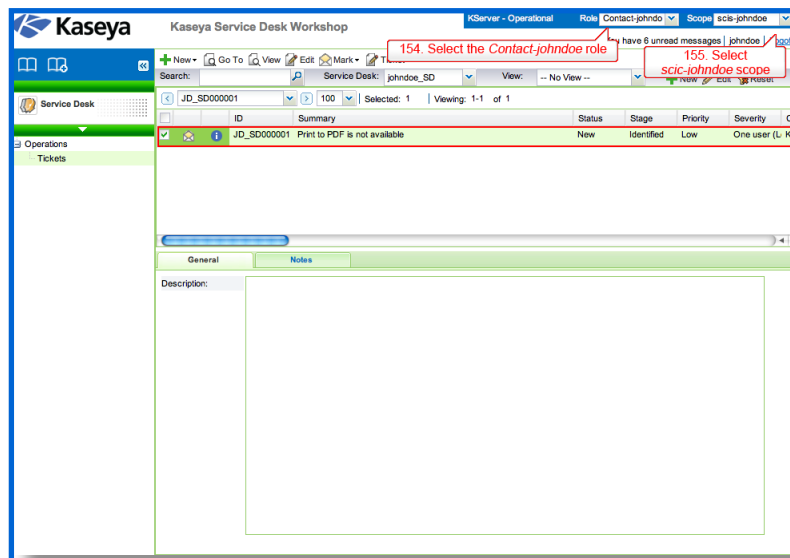
Verify the contacts' ticket access.

154. Select the *Contact-<USERNAME>* role.

155. Select the *scis-<USERNAME>* scope.

156. Go to *Service Desk > Tickets*.

157. Observe that the SCIS contact is now able to see the first ticket that was created on a SCIS end user's behalf.



Verify the machine users' ticket access.

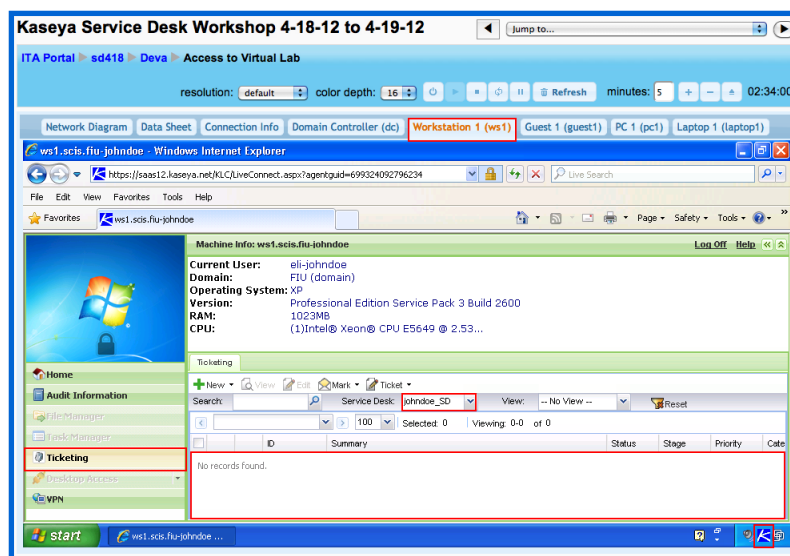
158. Remote login to *ws1*.

159. Double click on the Kaseya icon in the system tray.

160. Click on *Ticketing* in the left pane.

161. Make sure that the *<USERNAME>_SD* is selected for the *Service Desk* dropdown box in the bottom right pane.

162. Observe that the *ws1* machine user is not able to see the ticket that was created on his behalf.



You realized that you specified the machine group of the machine with the issue, but you did not exactly specify which machine. Specify the machine id in your first ticket.

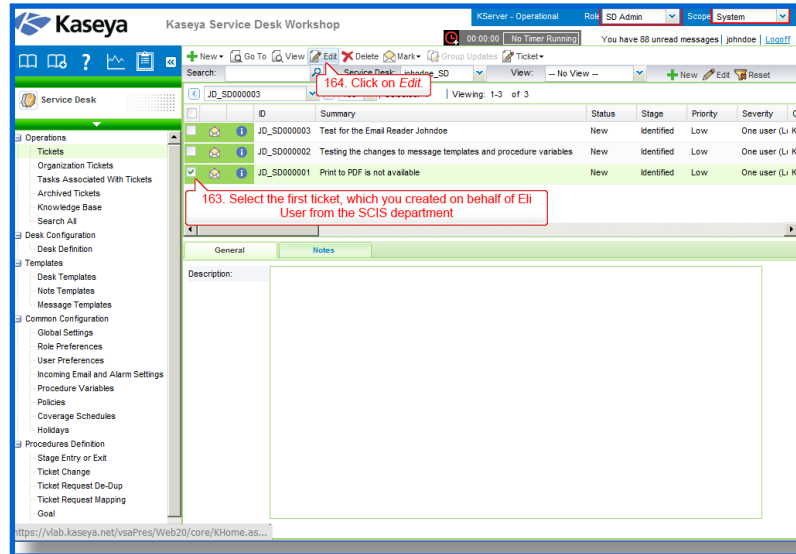
163. Select the *SD Admin* role.

164. Select the *System* scope.

165. Go to *Service Desk > Tickets*.

166. Select the first ticket, which you created on behalf of Eli User from the SCIS department, in the right pane.

167. Click on *Edit*.

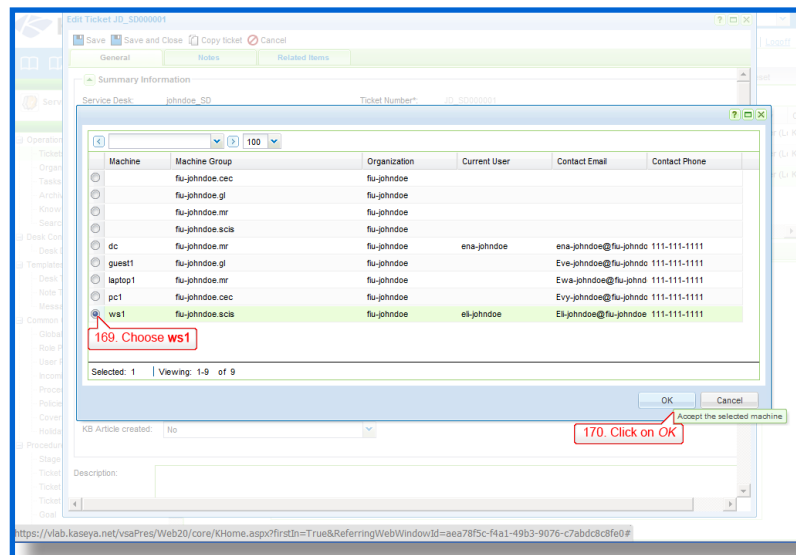


168. Click on the magnifying glass next to the *Machine Id* field.

169. Choose *ws1*.

170. Click on *OK*.

171. Click on *Save and Close*.

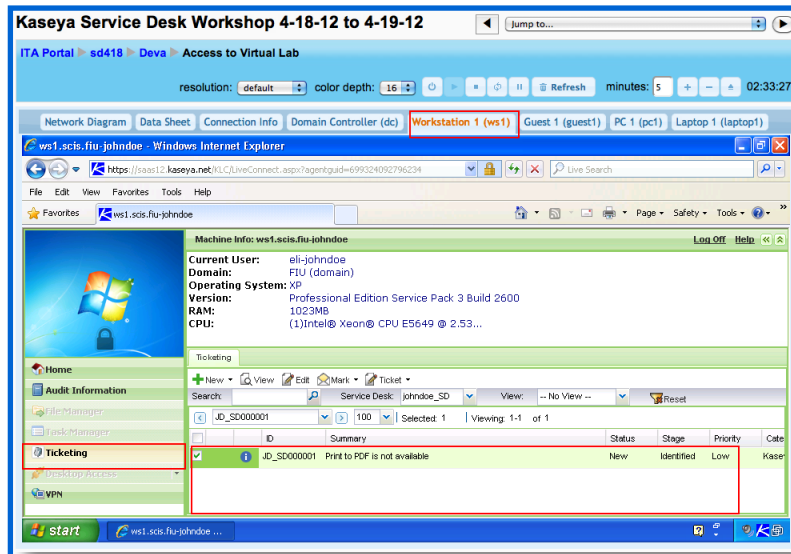


Verify the machine users' ticket access.

172. Remote login to *ws1*.

173. Double click on the Kaseya icon in the system tray.

174. Click on *Ticketing* in the left pane.
175. Make sure that the `<USERNAME>_SD` is selected for the *Service Desk* dropdown box in the bottom right pane.
176. Observe that the ws1 machine user is now able to see the ticket that was created on his behalf.



You need to make sure different SD user types would be able to **view only** and **edit** the fields that they are supposed to. Also, when a SD user creates a new ticket, it should be clear what fields are **required** to be entered or must be **hidden**.

As the admin of the service desk, you are supposed not only to be exposed to any field, but also you should be able to edit any field. However, there are certain fields that you do not want to edit them by mistake; so, for such fields, you should set their access as view only. Let's first look at the field access set initially for SD admin.

To review the SD Admin field access to your desk, you can either change your user role and scope to that of SD Admin, or just login using the credentials of one of your SD Admins. Here, we simply select the former approach.

177. Select the *SD Admin* user role from the *Role* dropdown box on the upper right corner of your VSA page.
178. Select the *Master* (or *System*, if on SaaS) scope from the *Scope* dropdown box. Recall that you previously decided to assign the *Master* (or *System*) scope to your SD admins.
179. Go to *Service Desk > Tickets*.
180. Click on the *New > New Ticket* button in the right pane.
181. Observe which fields are view only, editable, required, and hidden

Review and change the editing template and field access for SD Admin.

182. Go to *Service Desk > Role Preferences*.
183. Select the *SD Admin* role type from the middle pane.
184. Click on the *Service Desks* tab in the right pane.
185. Select your desk, *<USERNAME>_SD*.
186. Click on *Change*.
187. Observe which fields are, views only, editable, required, and hidden.

As you are happy with the default edit template and field access settings for SD Admin, you do not make any changes. As in your desk, you are the only SD Admin, and you typically use your default *Master / System* role, it is convenient if you do not have to change your role when manipulating your service desk. Therefore, you decide to review the edit template and field access for the *Master / System* role too.

Review the *Master / System* field access to your desk.

188. Select the *Master / System* user role from the *Role* dropdown box.

189. Select the *Master / System* scope from the *Scope* dropdown box.

190. Go to *Service Desk > Tickets*.

191. Click on the *New > New Ticket* button in the right pane.

192. Observe which fields are, view only, editable, required, and hidden.

Change the edit template and field access to your desk for *Master/System*.

193. Go to *Service Desk > Role Preferences*.

194. Select the *Master/System* role from the middle pane.

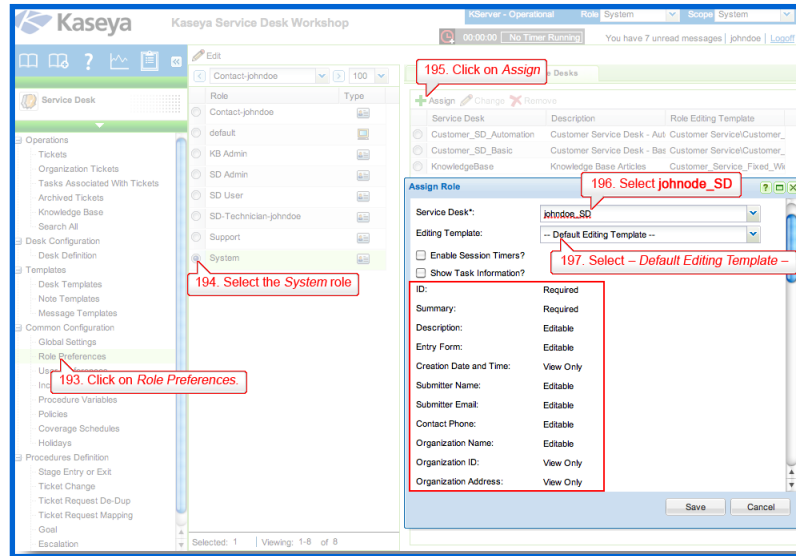
195. Click on the *Service Desks* tab in the right pane. You notice that your desk, *<USERNAME>_SD*, is not listed.

196. Click on *Assign*.

197. Select your desk, *<USERNAME>_SD*, from the *Service Desk* dropdown box.

198. Select – *Default Editing Template* – from the *Editing Template* dropdown box.

199. Observe which fields are, view only, editable, required, and hidden by default.



You are happy with the default selection, which is exactly the same as that of the *SD Admin* field access settings.

200. Click on **Save**.

Verify that your changes to the *Master / System* field access; have been applied as you intended.

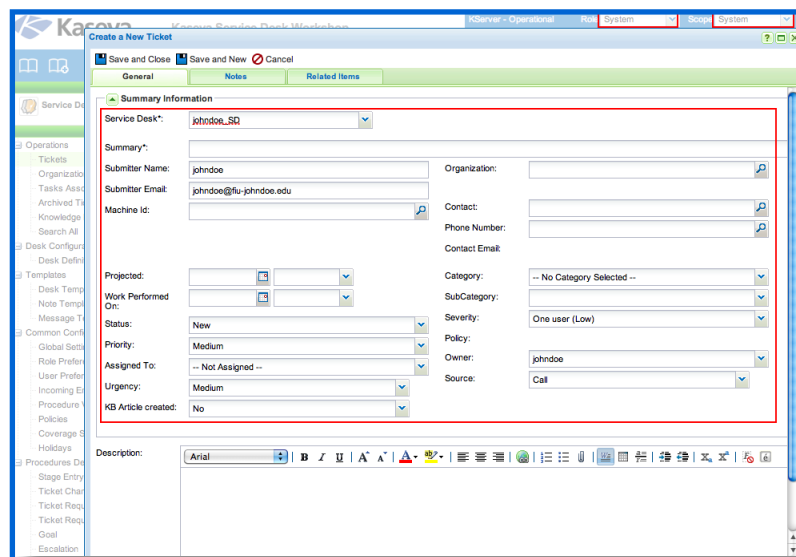
201. Select the *Master / System* user role from the *Role* dropdown box.

202. Select the *Master / System* scope from the *Scope* dropdown box.

203. Go to *Service Desk > Tickets*.

204. Click on the *New > New Ticket* button in the right pane.

205. Observe which fields are view only, editable, required, and hidden.



You would like all the SD technicians to be **required** to enter the following fields: **Summary**, **Submitter**

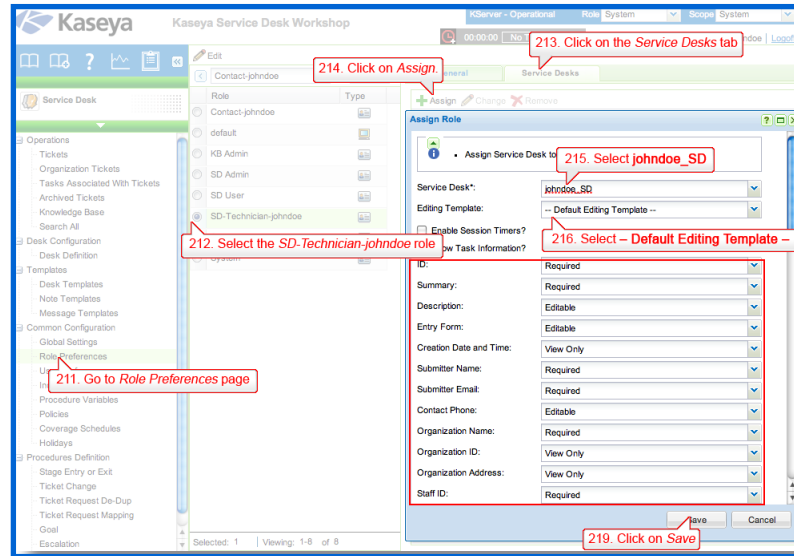
Name, Submitter Email, Organization Name, and Staff ID.

Unlike the SD Admins, SD techs must not be able to edit some fields, but should be able to **view** their values. Set the following field as view only: **Creation Date and Time, Closed Date and Time, Due Date and Time, Actual Completed Date, Organization ID, Organization Address, Contact Email, Escalation, Stage Goal, Priority, and Stage**

206. Select the *SD-Technician-<USERNAME>* user role from the *Role* dropdown box.
207. Select the *SD-Technician-<USERNAME>* scope from the *Scope* dropdown box.
208. Go to *Service Desk > Tickets*.
209. Click on the *New > New Ticket* button in the right pane.
210. Observe which fields are, view only, editable, required, and hidden.

Change the SD Tech Field Access.

211. Go to *Service Desk > Role Preferences*.
212. Select the *SD-Technician-<USERNAME>* role.
213. Click on the *Service Desks* tab in the right pane. You notice that your desk, *<USERNAME>_SD*, is not listed.
214. Click on *Assign*.
215. Select your desk, *<USERNAME>_SD*, from the *Service Desk* dropdown box.
216. Select – *Default Editing Template* – from the *Editing Template* dropdown box.
217. Make sure that the following fields are **required**: *Summary, Submitter Name, Submitter Email, Organization Name, and Staff ID*.
218. Make sure that the following fields are **view only**: *Escalation, Stage Goal, Priority, and Stage*.
219. Click on *Save*.



You would like the end user contacts to be **required** to enter the following fields: **Summary, Submitter Name, Submitter Email, Organization Name, and Staff ID**

The following fields should be **view only**: **Creation Date and Time, Closed Date and Time, Due Date and Time, Actual Completed Date, Organization ID, Organization Address, Contact Email, Promise Date and Time, Source Type, Status, Resolution, and Source.**

The following fields should be **hidden** for the end user contacts: **Hidden Note Option, Suppress Notification Option, Note Template, Billable Option, Hidden Notes, Standard Rate, Override Rate, Owner, Locked By, Modified On, Escalation, Stage Goal, Priority, Stage, Locked On, Assignee, and KB Article Created.**

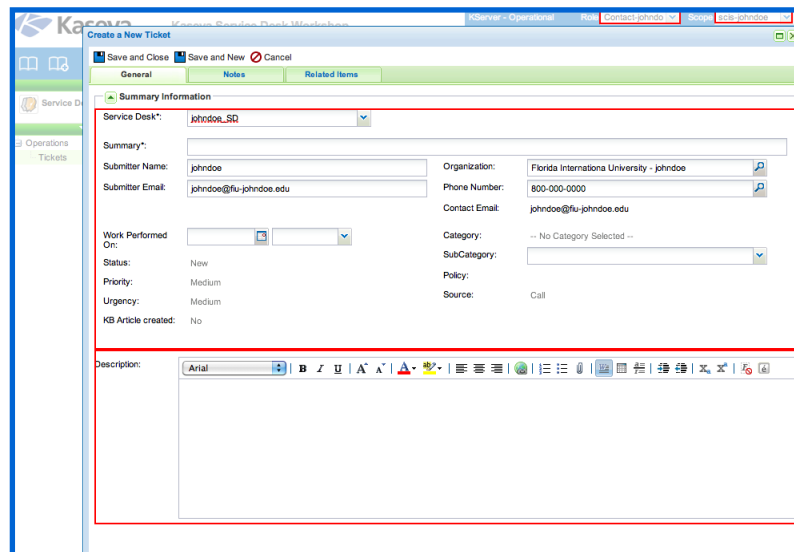
220. Select the *Contact-<USERNAME>* user role from the *Role* dropdown box

221. Select the *scis-<USERNAME>* scope from the *Scope* dropdown box.

222. Go to *Service Desk > Tickets*.

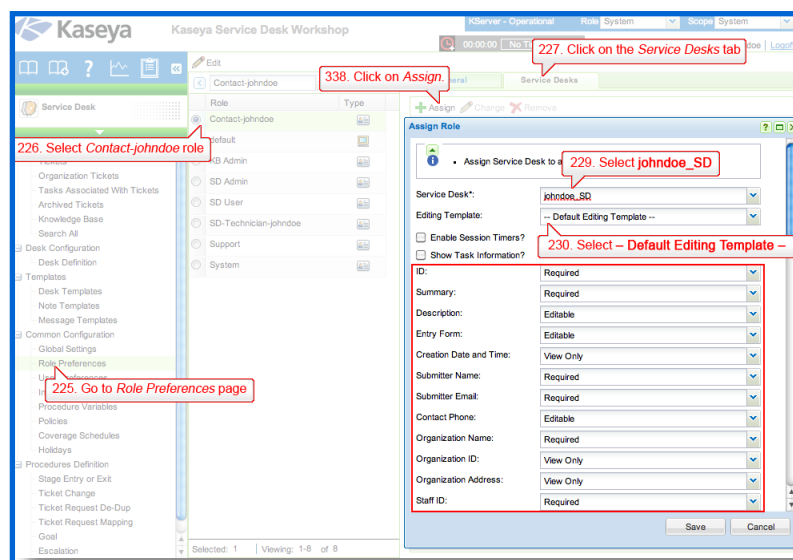
223. Click on the *New > New Ticket* button in the right pane.

224. Observe which fields are, view only, editable, required, and hidden.



Change the Contact Field Access.

225. Go to *Service Desk > Role Preferences*.
226. Select the *Contact-<USERNAME>* role.
227. Click on the *Service Desks* tab in the right pane. You notice that your desk, *<USERNAME>_SD*, is not listed.
228. Click on *Assign*.
229. Select your desk, *<USERNAME>_SD*, from the *Service Desk* dropdown box.
230. Select – *Default Editing Template* – from the *Editing Template* dropdown box.
231. Make sure that the following fields are **required**: *Summary*, *Submitter Name*, *Submitter Email*, *Organization Name*, and *Staff ID*.
232. Make sure that the following fields are **view only**: *Creation Date and Time*, *Closed Date and Time*, *Due Date and Time*, *Actual Completed Date*, *Organization ID*, *Organization Address*, *Contact Email*, *Promise Date and Time*, *Source Type*, *Status*, *Resolution*, and *Source*.
233. Make sure that the following fields are **hidden**: *Hidden Note Option*, *Suppress Notification Option*, *Note Template*, *Billable Option*, *Hidden Notes*, *Standard Rate*, *Override Rate*, *Owner*, *Locked By*, *Modified On*, *Escalation*, *Stage Goal*, *Priority*, *Stage*, *Locked On*, *Assignee*, and *KB Article Created*.
234. Click on *Save*.



You would like the machine users to have almost the same field access as the contacts, but a bit more restricted and the editing template should be the one more appropriate for Live Connect (Access Portal).

You would like the end user contacts to be **required** to enter the following fields: **Summary**, **Submitter Name**, **Submitter Email**, **Organization Name**, and **Staff ID**.

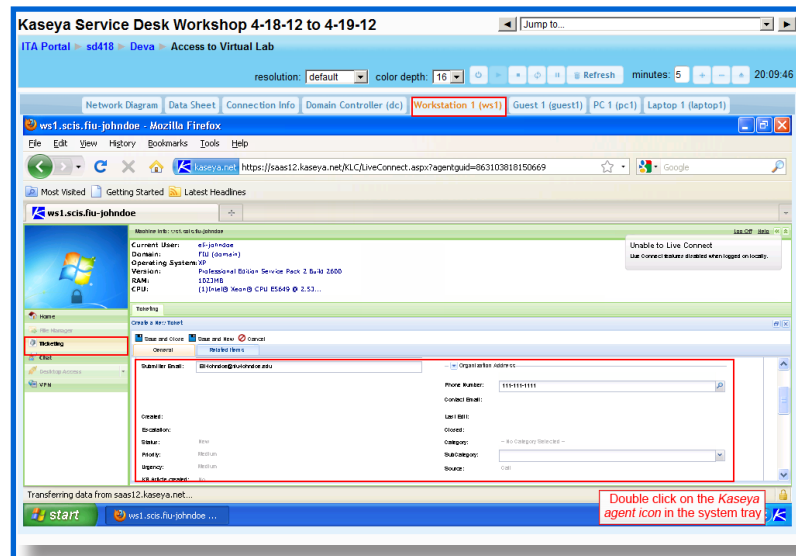
The following fields should be **view only**: **Creation Date and Time**, **Closed Date and Time**, **Due Date and Time**, **Actual Completed Date**, **Organization ID**, **Organization Address**, **Contact Email**, **Promise Date and Time**, **Note time**, **Source Type**, **Status**, **Resolution**, and **Source**.

The following fields should be **hidden** for the end user contacts: **Hidden Note Option**, **Suppress Noti-**

ification Option, Note Template, Billable Option, Hidden Notes, Standard Rate, Override Rate, Owner, Locked By, Modified On, Escalation, Activity, Work Order, Resource Type, Stage Goal, Priority, Stage, Locked On, Assignee, and KB Article Created.

The following fields should be **editable** for the end user contacts: **Category, Note, Severity, and Urgency.**

235. Remote login to ws1.
236. Double click on the Kaseya icon agent in the system tray.
237. Click on *Ticketing*.
238. Click on the *New > New Ticket* button in the right pane.
239. Observe which fields are, view only, editable, required, and hidden.



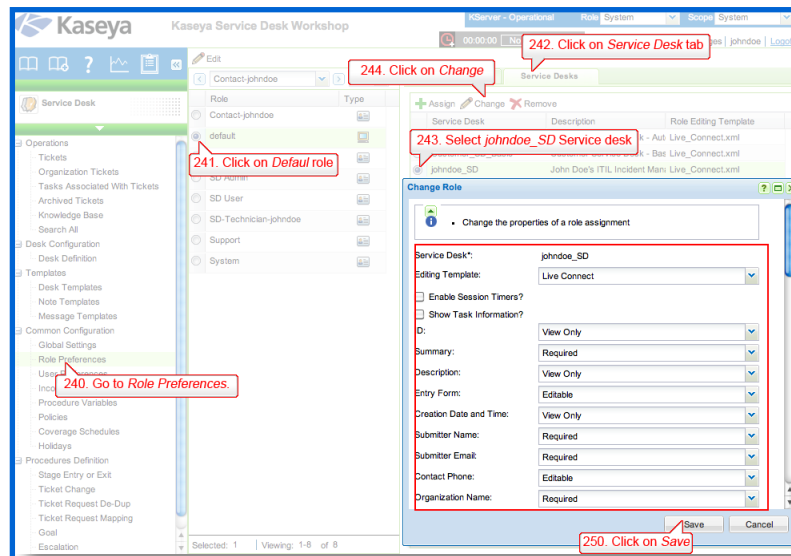
- Change the Machine User Field Access.

240. Go to *Service Desk > Role Preferences*.
241. Select the *default* role.
242. Click on the *Service Desks* tab in the right pane.
243. Select your desk, *<USERNAME>_SD*, from the listed.
244. Click on *Change*.
245. Select *Live Connect* from the *Editing Template* dropdown box.
246. Make sure that the following fields are **required**: **Summary, Submitter Name, Submitter Email, Organization Name, and Staff ID.**
247. Make sure that the following fields are **view only**: **Creation Date and Time, Closed Date and Time, Due Date and Time, Actual Completed Date, Organization ID, Organization Address, Contact Email, Promise Date and Time, Note time, Source Type, Status, Resolution, and Source.**
248. Make sure that the following fields are **hidden**: **Hidden Note Option, Suppress Notification Op-**

tion, Note Template, Billable Option, Hidden Notes, Standard Rate, Override Rate, Owner, Locked By, Modified On, Escalation, Activity, Work Order, Resource Type, Stage Goal, Priority, Stage, Locked On, Assignee, and KB Article Created.

249. Make sure that the following fields are **editable**: **Category, Note, Severity, and Urgency**.

250. Click on **Save**.



Note: Under the *Service Desk > User Preferences* each user has their own User Preferences settings. However it cannot overwrite restrictions applied by the Role Preferences.



To utilize your resources efficiently, you need to learn about the skill set of each and every one of your team members, and accordingly assign them to appropriate resource pools. This way, you can best utilize their time and experience.

Based on the skill set and experience of your support team member, you decide to divide them into two resource pools. You also decide to define a resource pool for the support management.

- Delete Tier3 Support pool, and then add Ted, Tia, Tim, and Tud to Tier1 Support pool; and Tom and Tru to Tier2 Support pool.

251. Go to *Service Desk > Desk Definition*.

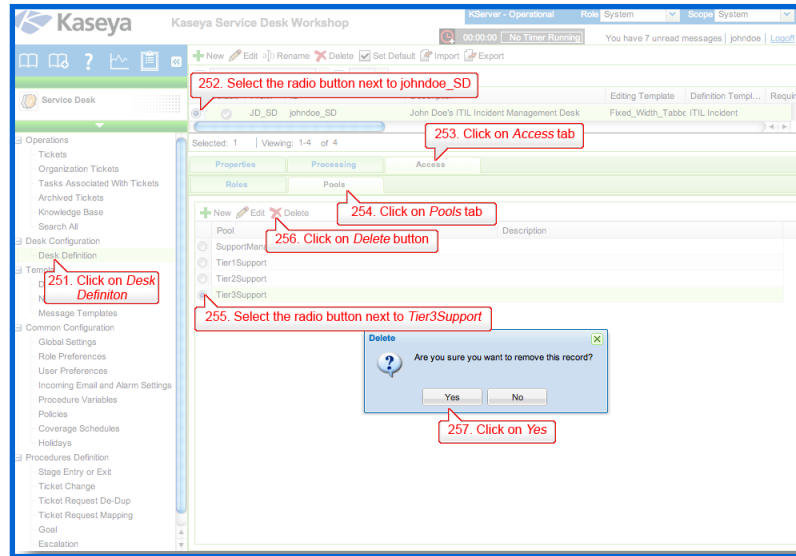
252. Select your desk, *<USERNAME>_SD* from the list in the top right pane.

253. Navigate to *Access > Pools* tab in the bottom right pane. Observe that 4 resource pools have already been defined for your desk.

254. Select *Tier3Support* from the list.

255. Click on *Delete*.

256. Click on *Yes*.



- Adding SD Techs to Tier 1 Support Pool

257. Go to *Service Desk > Desk Definition*.

258. Select your desk, *<USERNAME>_SD* from the list in the top right pane.

259. Navigate to *Access > Pools* tab in the bottom right pane.

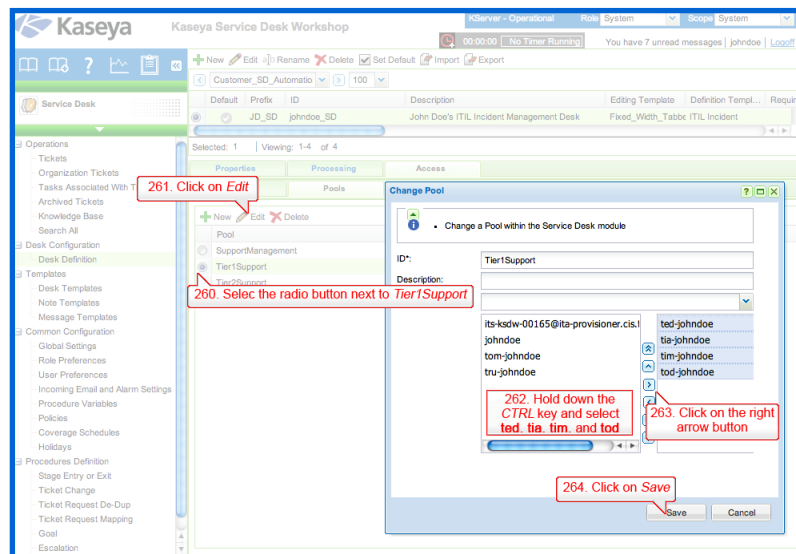
260. Select *Tier1Support* from the list.

261. Click on *Edit*.

262. Using the *Shift* and *Ctrl* keys, select all the technicians that you intend to assign to this pool from the left list. The usernames are Ted-*<USERNAME>*, Tia-*<USERNAME>*, Tim-*<USERNAME>*, and Tud-*<USERNAME>*.

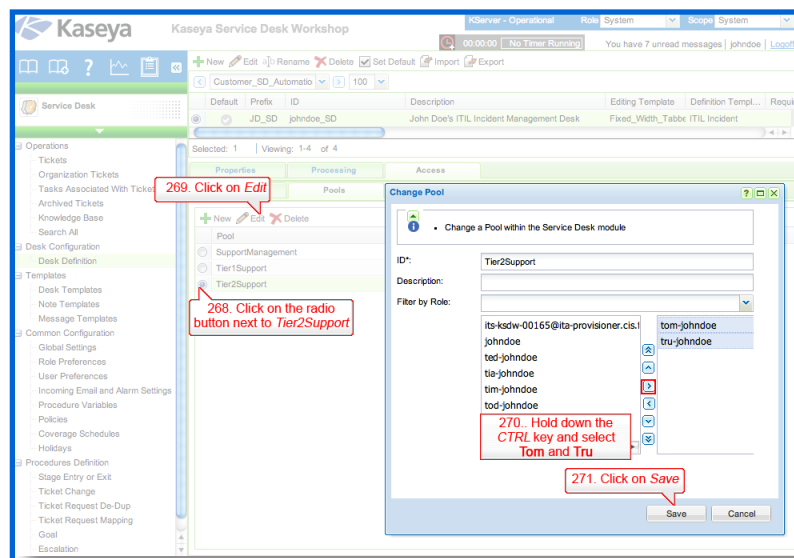
263. Click on the right arrow button to move the selected technicians to the right list.

264. Click on *Save*.



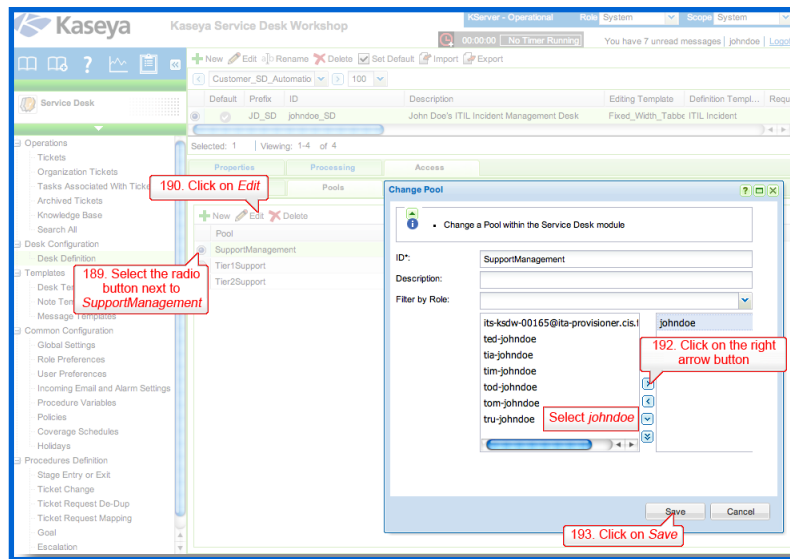
- Adding SD Techs to Tier 2 Support Pool

265. Go to *Service Desk > Desk Definition*.
266. Select your desk, <USERNAME>_SD from the list in the top right pane.
267. Navigate to *Access > Pools* tab in the bottom right pane.
268. Select *Tier2Support* from the list.
269. Click on *Edit*.
270. Using the *Shift* and *Ctrl* keys, select all the technicians that you intend to assign to this pool from the left list. The usernames are Tom-<USERNAME> and Tru-<USERNAME>.
271. Click on the right arrow button to move the selected technicians to the right list.
272. Click on *Save*.



- Adding SD Admins to Support Management

273. Go to *Service Desk > Desk Definition*.
274. Select your desk, <USERNAME>_SD from the list in the top right pane.
275. Navigate to *Access > Pools* tab in the bottom right pane.
276. Select *SupportManagement* from the list.
277. Click on *Edit*.
278. Using the *Shift* and *Ctrl* keys, select all the SD Admins that you intend to assign to this pool from the left list. The only SD admin in your desk is your own username, <USERNAME>.
279. Click on the right arrow button to move the selected technicians to the right list.
280. Click on *Save*.



Automatic processing of tickets in Service Desk can be triggered by

- The creation of the ticket
 - Begin Stage Entry Procedure
 - Ticket Request Mapping/De-Dup Procedures
- the transition from one stage to another
 - Stage Entry or Exit Procedures
- any changes to the ticket
 - Ticket Change Procedure
- a ticket remaining in a stage or not closed beyond some time
 - Goal and Escalation Procedures

Note: Service procedures can call/execute sub-procedures, enabling code reuse and modular automation. Service procedures can also trigger the running of an agent procedure on a managed machine using the Schedule Procedure step.

To modify the automation in your desk, you need to follow these steps:

- Specify the Required Behavior
- Identify the Affected Procedures
- Adjust the Procedures
- Verify the Changes

Automatic Categorization

When a new ticket is created by a user, if the category is not set, set it as follows:

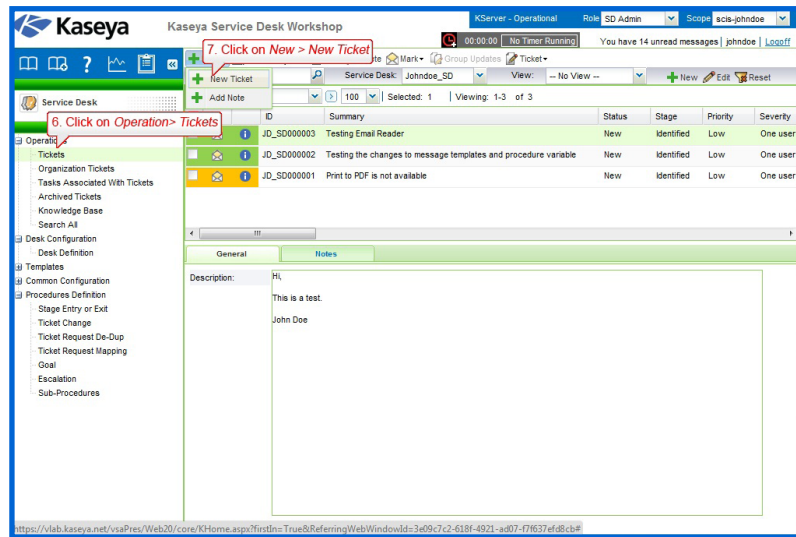
- If the summary includes “Panther”, set the category to “Software Error” and sub-category to “PantherSoft”.
- Otherwise, if includes “Print”, the category is “Hardware Error” and sub is “Printer”.
- Otherwise, if includes “Purchase”, the category is “Purchase”, sub is “Request for Purchase”.
- Otherwise, if includes “Quote”, the category is “Purchase”, sub is “Request for Quote”.

To verify the changes to the sub-procedure, you create 5 tickets to test its new behavior as follows:

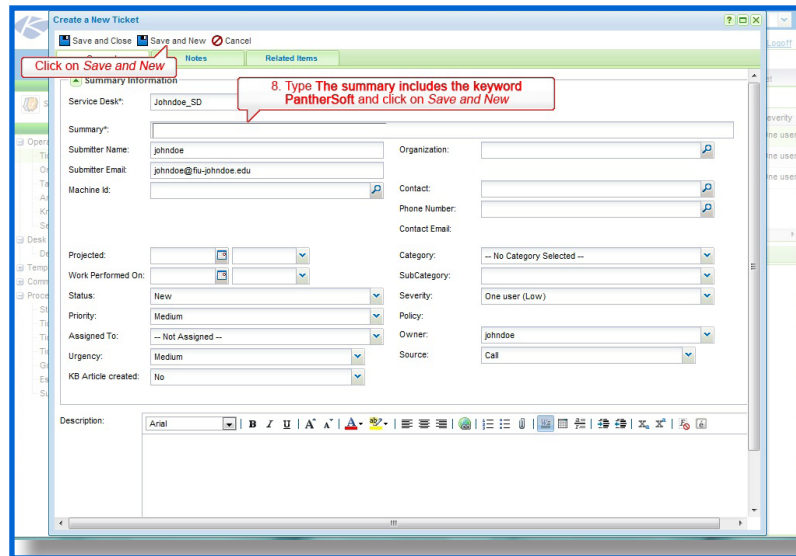
- Summary includes “PantherSoft”.
- Summary includes “PantherSoft”, but it is already categorized to “Service Request”.
- Summary includes “Printer”.
- Summary includes “purchase”.
- Summary includes “quote”.

6. Click on *Operation > Tickets*.

7. Click on *New > New Ticket*



8. Type **The Summary includes PantherSoft** in the *Summary* textbox and click on *Save and New*.



9. Type **The summary includes the keyword PantherSoft**, but is categorized in the *Summary* textbox.
10. Click on *Category* dropdown menu and select *Service Request*.
11. Click on *SubCategory* dropdown menu and Select *Guidance Question*.
12. Click on *Save and New*.

12. Click on Save and New

9.1 Type The summary includes the keyword PantherSoft, but is categorized

10. Click on Category dropdown menu and Select Service Request

11. Click on SubCategory dropdown menu and Select Guidance Question

Repeat the above steps for the rest of the tickets.

ID	Summary	Status	Stage	Priority	Severity
JD_SD000008	the summary includes the keyword quote!	New	Identified	Low	One ui
JD_SD000007	the summary includes the keyword purchase!	New	Identified	Low	One ui
JD_SD000006	The summary includes the keyword Printer	New	Identified	Low	One ui
JD_SD000005	The summary includes the keyword PantherSoft, but is categorized	New	Identified	Low	One ui
JD_SD000004	The Summary includes the keywords PantherSoft	New	Identified	Low	One ui

When a new ticket is created, the priority of the ticket must be calculated based on the severity and urgency of the ticket. Accordingly to the calculated priority, the escalation, stage goal, and ticket due times must be set. The submitter and tier1 team must be notified.

Priority must have one of the five possible values, namely, *Critical*, *High*, *Medium*, *Low*, and *Planning*. The priority levels must be defined as follows.

- *Critical* is *Priority 1*
- *High* is *Priority 2*
- *Medium* is *Priority 3*
- *Low* is *Priority 4*
- *Planning* is *Priority 5*

Priority level must be calculated based on Severity and Urgency as follows.

Severity/Urgency	High	Medium	Low
High	Priority 1	Priority 2	Priority 3
Medium	Priority 2	Priority 3	Priority 4
Low	Priority 3	Priority 4	Priority 5

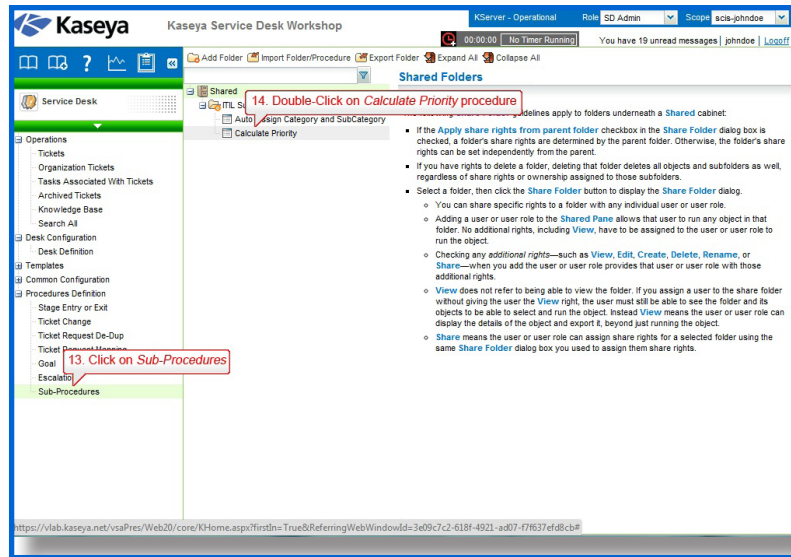
Escalation Time, Stage Goal Time, and Ticket Goal Time must be set as follows. Values in the table are in hours.

Priority	Default_SLA		
	Escalation Time	Stage Goal Time	Ticket Goal Time
Priority 1	4	9	36
Priority 2	8	17	68
Priority 3	16	33	132
Priority 4	32	65	260
Priority 5	64	129	516

Note: You may have noticed that the stage goal times for different priorities allows for two stage escalations. Also, the ticket goal times for different priorities are 4 times the corresponding stage goal times, counting for the *Identified*, *Tier1*, *Tier2*, and *Solved* stage goal times. This is just one way of coming up with the related values for stage and ticket goal times; your desk may be very different.

Adjust Calculate Priority; make sure that all the steps setting the escalation and goal times are eliminated. Next, you need to create three procedures that separately set the escalation time, stage goal time, and ticket goal time, based on the calculated priority. Also, you need to fix the values for the existing procedure variables, and add new variable, if need be.

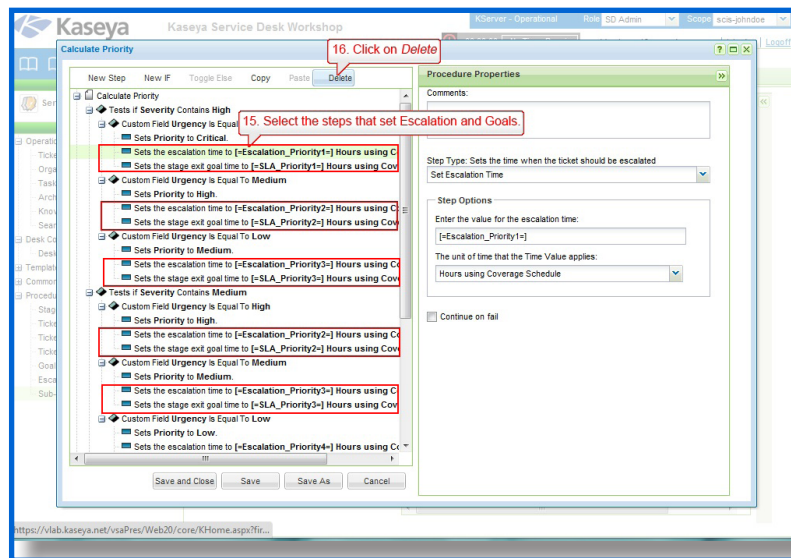
13. Go to *Sub-Procedure* page.
14. Double-Click on *Calculate Priority* procedure.



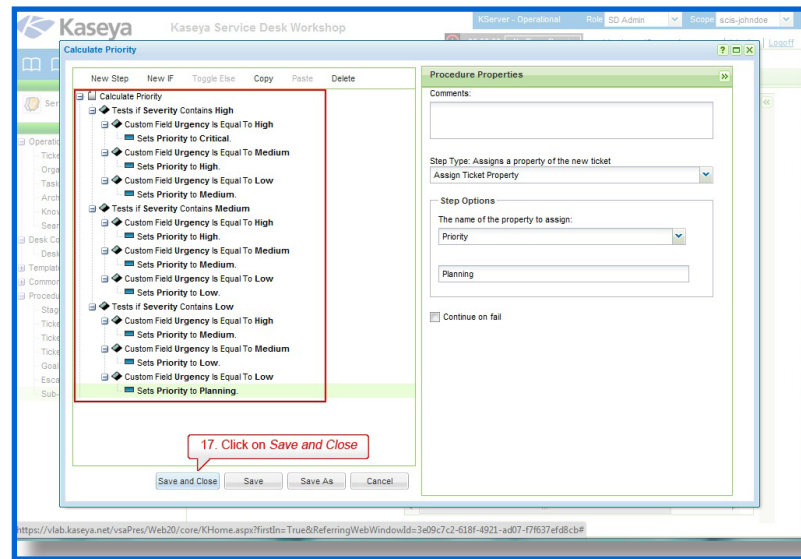
15. Select the steps that set Escalations and goals.

16. Click on *Delete* button.

Repeat the steps for every step that sets Escalation and Goal.



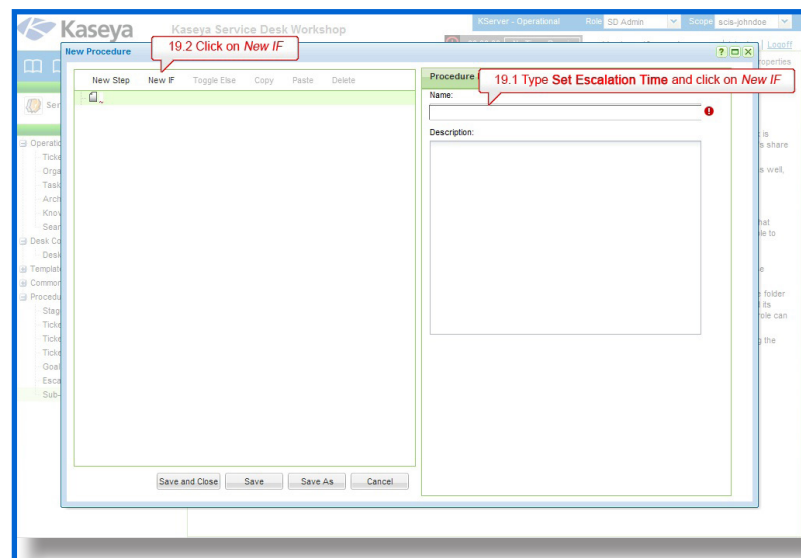
17. Click on *Save and Close*.



- Now, you need to create sub-procedure to set the *Escalation Time*.

18. Click on *New Procedure*.

19. Type **Set Escalation Time** in the *Name* textbox and click on *New IF*.

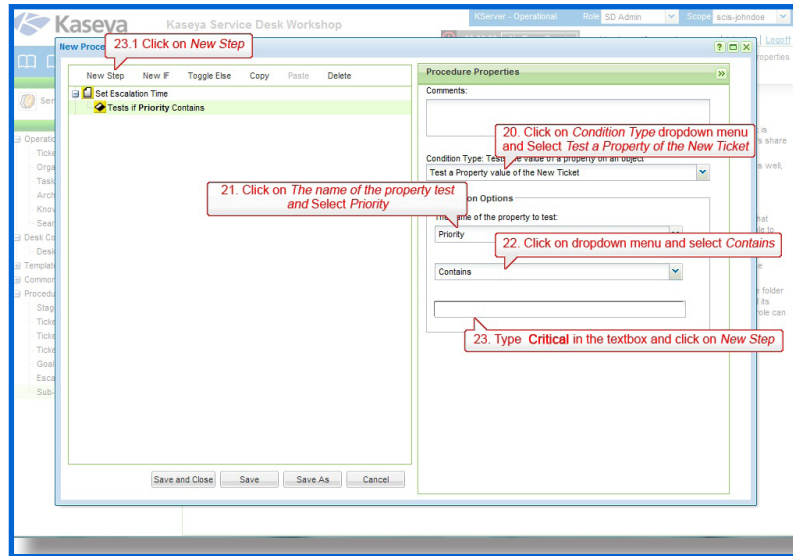


20. Click on *Condition Type* and select

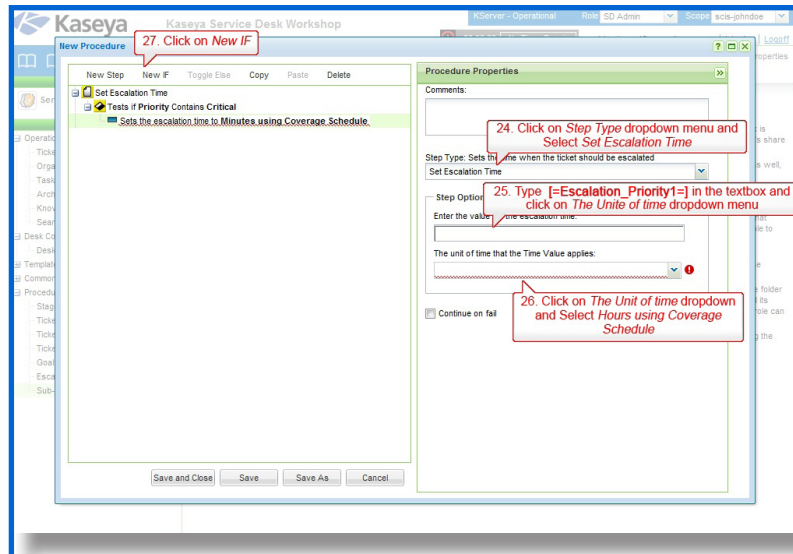
21. Click on *The Name of the property test* and select *Priority*.

22. Click on the next dropdown menu and select *Contains*.

23. Type *Critical* the textbox and click on *New Step*.

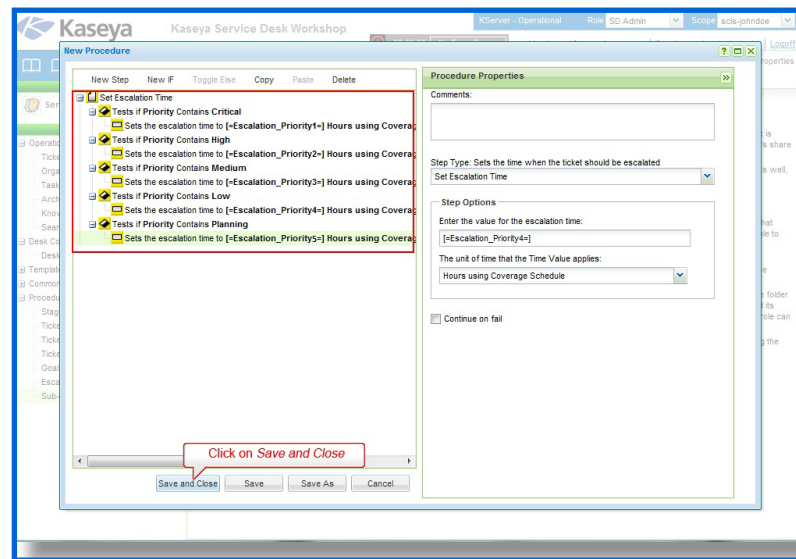


24. Click on *Step Type* dropdown menu and select *Set Escalation Time*.
25. Type `[=Escalation_Priority1=]` in the textbox
26. Click on *The Unit of time* dropdown and select *Hours using Coverage Schedule*.
27. Click on *New IF*.



Repeat the above steps for all 5 Escalation Priorities and click on *Save and Close*.

Priority	Escalation Time
Critical	Escalation_Priority1
High	Escalation_Priority2
Medium	Escalation_Priority3
Low	Escalation_Priority4
Planning	Escalation_Priority5



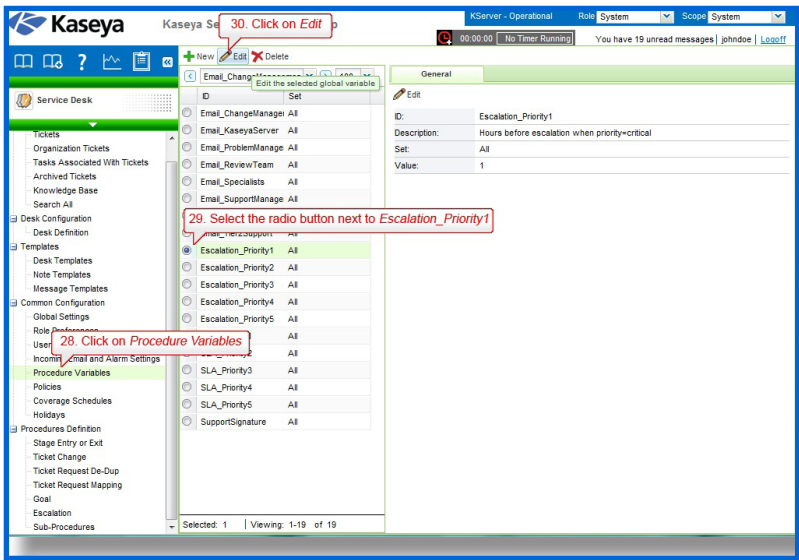
- Next, you need to create set the procedure variables corresponding to the Escalation times with respect to the five different priorities in your desk according to the below table.

Priority	Escalation Time (h)
Priority 1	4
Priority 2	8
Priority 3	16
Priority 4	32
Priority 5	64

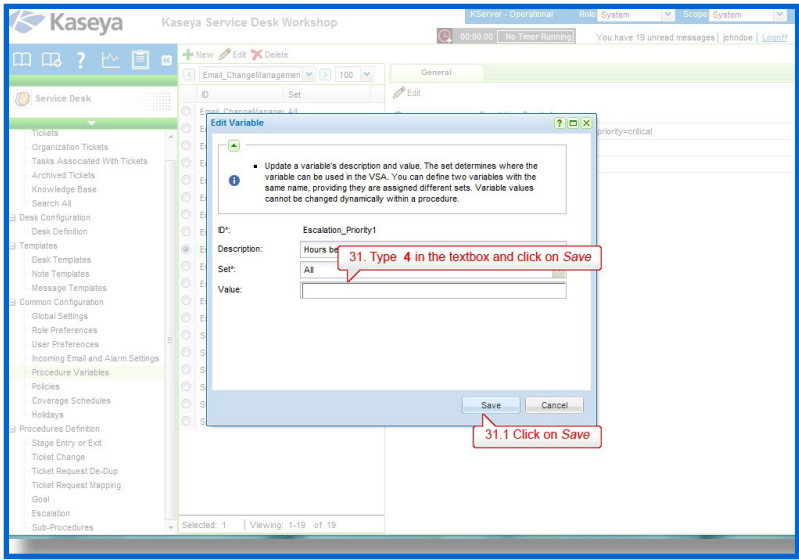
28. Go to *Procedure Variable*.

29. Select the radio button next to *Escalation_Priority1*.

30. Click on *Edit*.



31. Type 4 in the value textbox and click on Save.

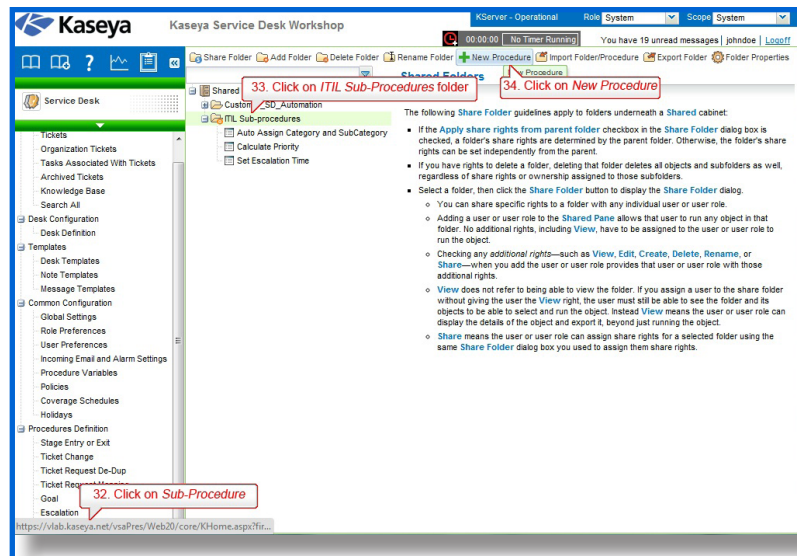


Repeat the above steps for all of the Escalation Priority and set the value according to the table.

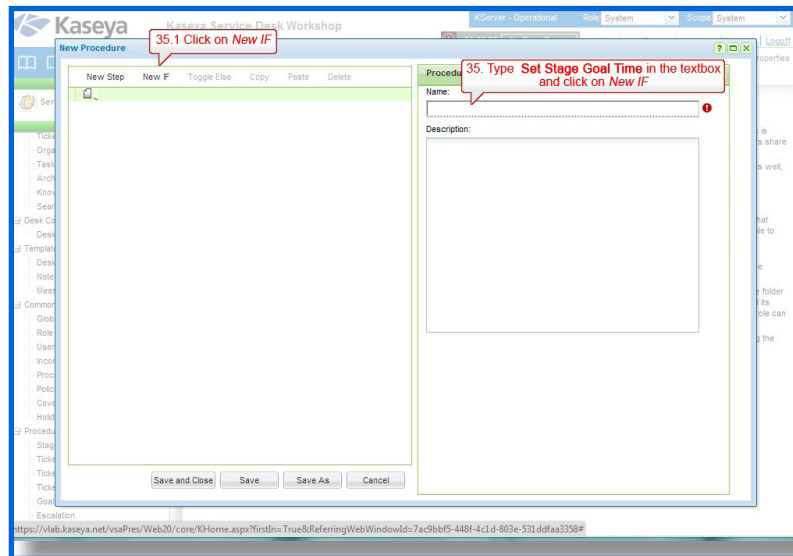
- Next, you need to create sub-procedure to set the *Stage Goal Time* using the below table.

Priority	Stage Goal Time
Critical	SLA_Priority1
High	SLA_Priority2
Medium	SLA_Priority3
Low	SLA_Priority4
Planning	SLA_Priority5

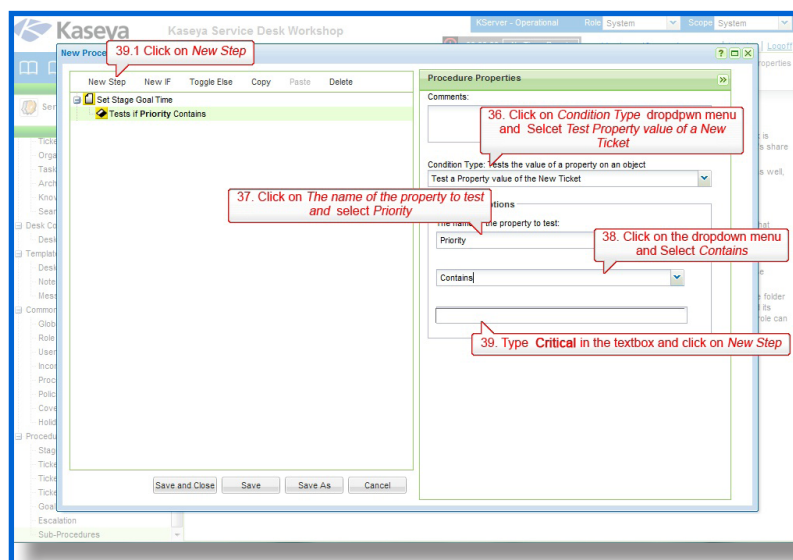
32. Go to *Sub-Procedure* page.
33. Click on *ITIL Sub-Procedures* folder.
34. Click on *New Procedure*.



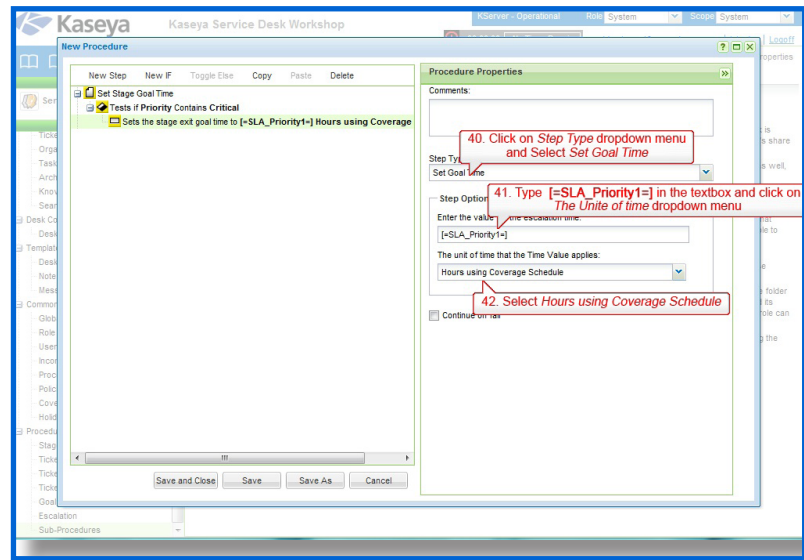
35. Type **Set Stage Goal Time** in the *Name* textbox and click on *New IF*.



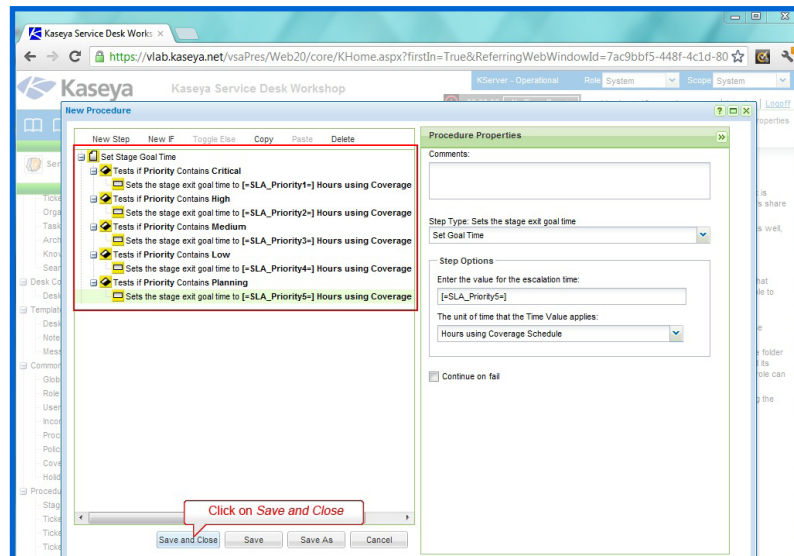
36. Click on *Condition Type* dropdown menu and select *Test Property value of a New Ticket*.
37. Click on *The Name of the property to test* dropdown menu and select *Priority*.
38. Click on the next dropdown menu and select *Contains*.
39. Type **Critical** in the textbox and click on *New Step*.



40. Click on *Step Type* dropdown menu and *Select Set Goal Time*.
41. Type **[=SLA_Priority1=]** in the textbox and click on *The Unite of time* dropdown menu
42. Select *Hours Using Coverage Schedule*.



Repeat the above steps for all of the SLA Priorities and click on *Save and Close*.



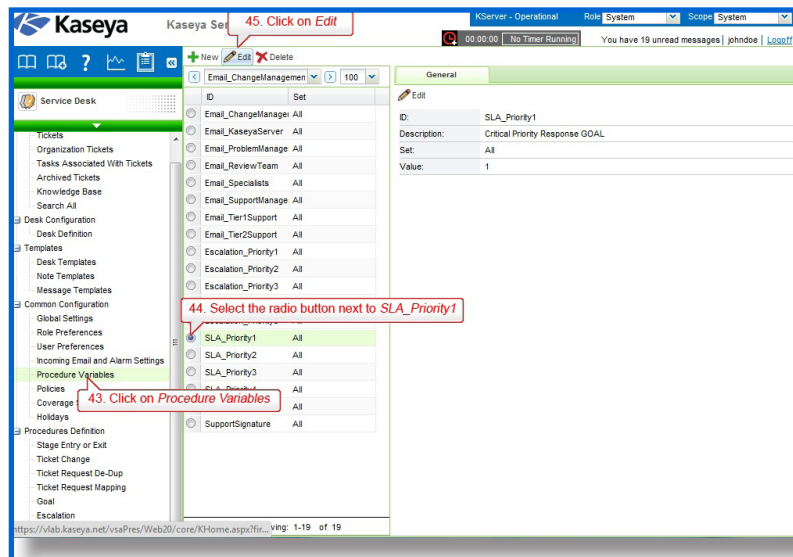
- Next, you need to create set the procedure variables corresponding to the stage goal times with respect to the five different priorities in your desk according to the below table.

Priority	Stage Goal Time (h)
Priority 1	9
Priority 2	17
Priority 3	33
Priority 4	65
Priority 5	129

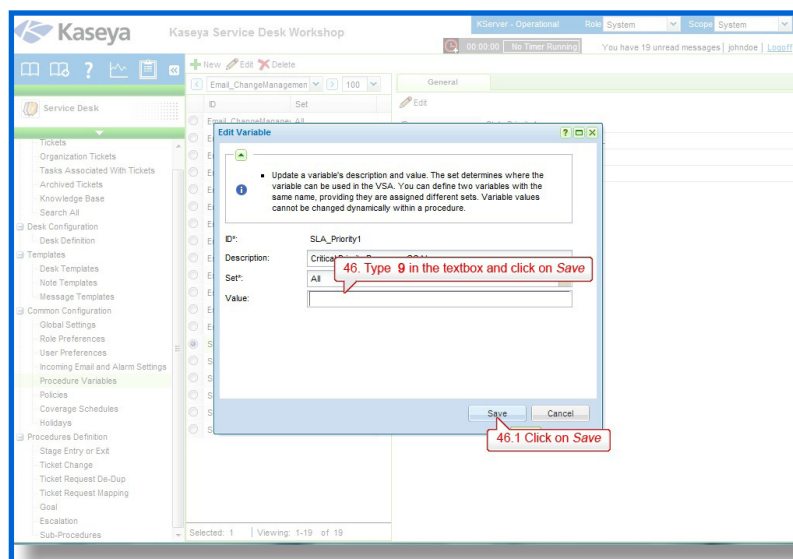
43. Go to *Procedure Variables* page.

44. Select the radio button next to *SLA_Priority1*.

45. Click on *Edit*.



46. Type **9** in the value textbox and click on *Save*



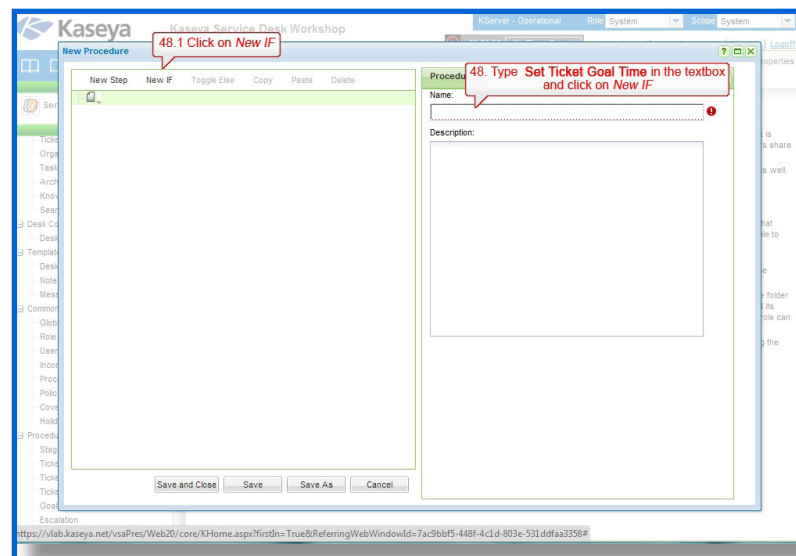
Repeat the steps above for all 5 priorities.

- Next, you need to create sub-procedure to set the *Ticket Goal Time*.

Priority	Ticket Goal Time
Critical	Goal_Priority1
High	Goal_Priority2
Medium	Goal_Priority3
Low	Goal_Priority4
Planning	Goal_Priority5

47. Go to *Sub-Procedure* page and click on *New Procedure*.

48. Type **Set Ticket Goal Time** in the *Name* textbox and click on *New IF*.

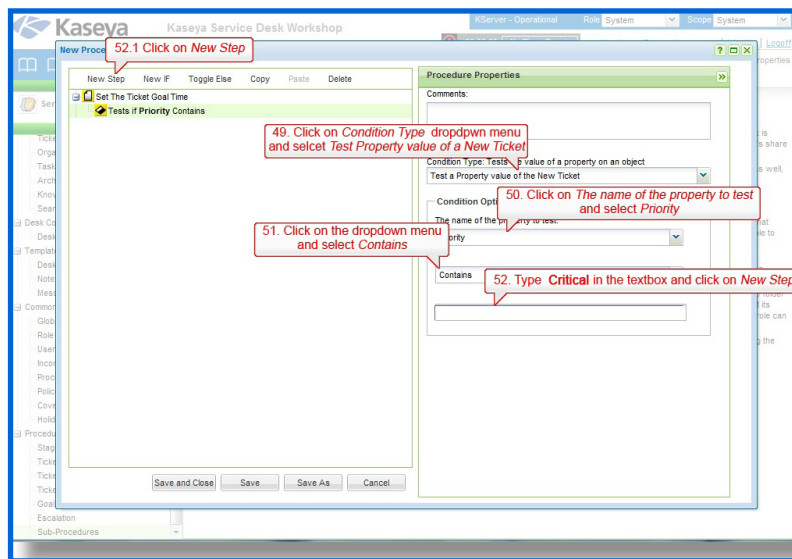


49. Click on *Condition Type* dropdown menu and select *Test Property value of a New Ticket*.

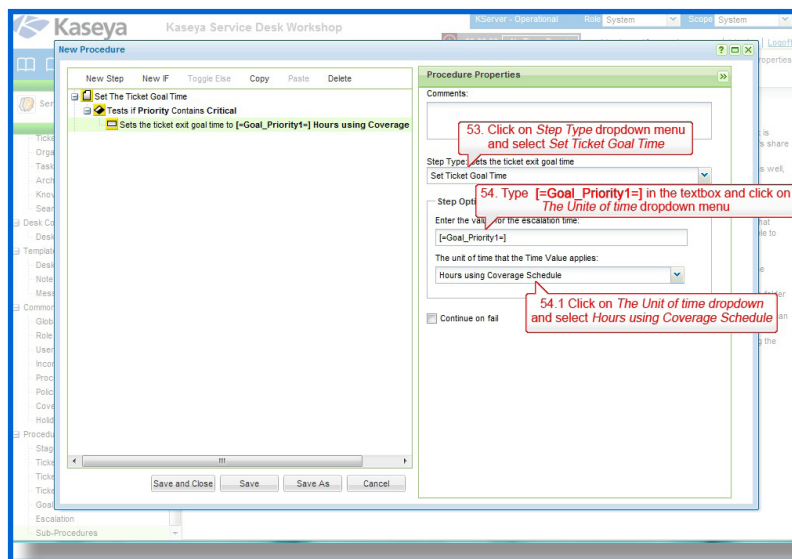
50. Click on *The name of the property to test* dropdown menu and select *Priority*.

51. Click on the next dropdown menu and select *Contains*.

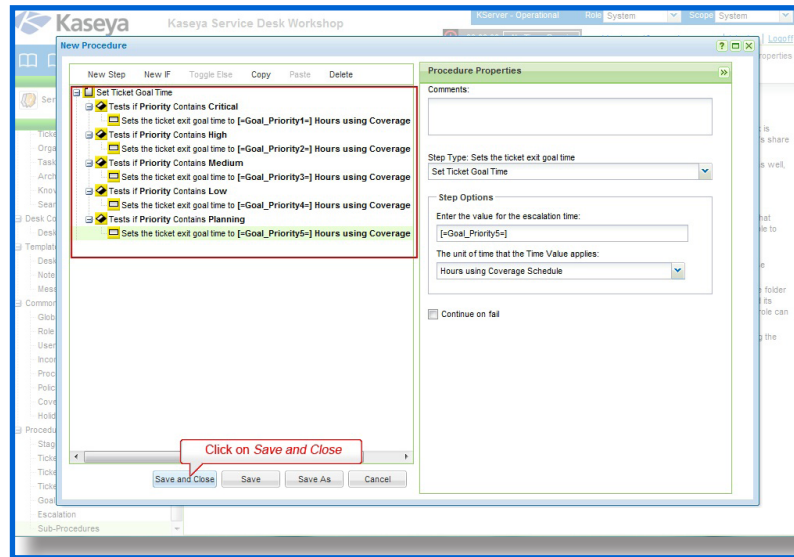
52. Type **Critical** in the textbox and click on *New Step*.



53. Click on Step Type dropdown menu and select Set Ticket Goal Time.
54. Type [=Goal_Priority1=] in the textbox and click on The Unit of time dropdown menu.
55. Select Hours using Coverage Schedule from the list.



Repeat the above step for all of the Goal Priorities and click on *Save and Close*

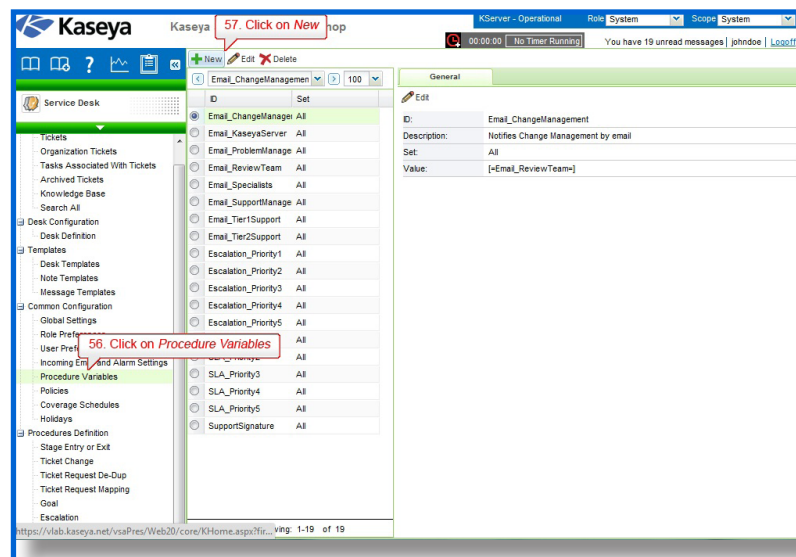


- Finally, you need to add more procedure variables corresponding to the ticket goal times with respect to the five different priorities in your desk according to below table.

Priority	Ticket Goal Time (h)
Priority 1	36
Priority 2	68
Priority 3	132
Priority 4	260
Priority 5	516

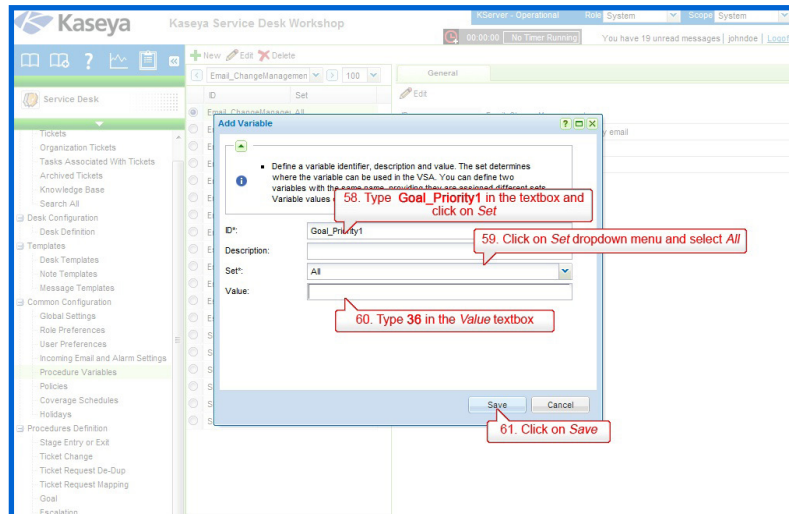
56. Go to *Procedure Variable* page

57. Click on *New*.



<https://slab.kaseya.net/vsaPres/Web20/core/KHome.aspx?fr...> vng: 1-19 of 19

58. Type **Goal_Priority1** in the *Name* textbox.
59. Click on *Set* dropdown menu and select *All*.
60. Type **36** in the *Value* textbox.
61. Click on *Save*.

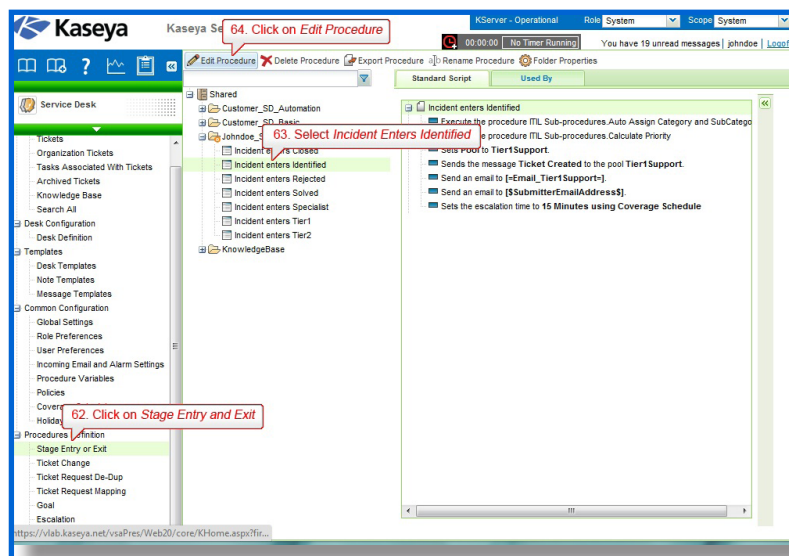


Repeat the above steps for all 5 Goal Priorities according to the table.

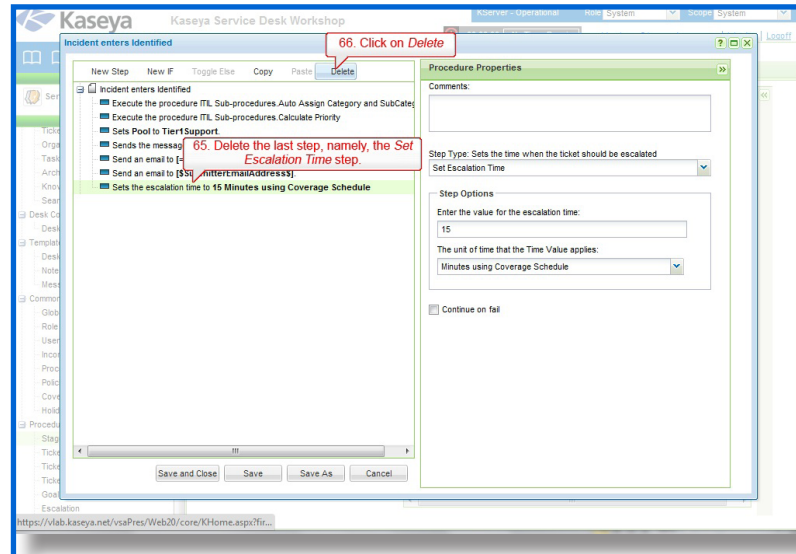
To adjust *Incident enters Identified*, you need to call the three new procedures right after *Calculate Priority* is called. You notice the use of *Email_Tier1Support* for referring to *Tier1Support* pool, which introduce inconsistency to your desk. To address this issue, instead of *Email_Tier1Support* use *Pool*. Remove the *Set Escalation Time* step.

- Adjust the *Incident enters Identified* procedure

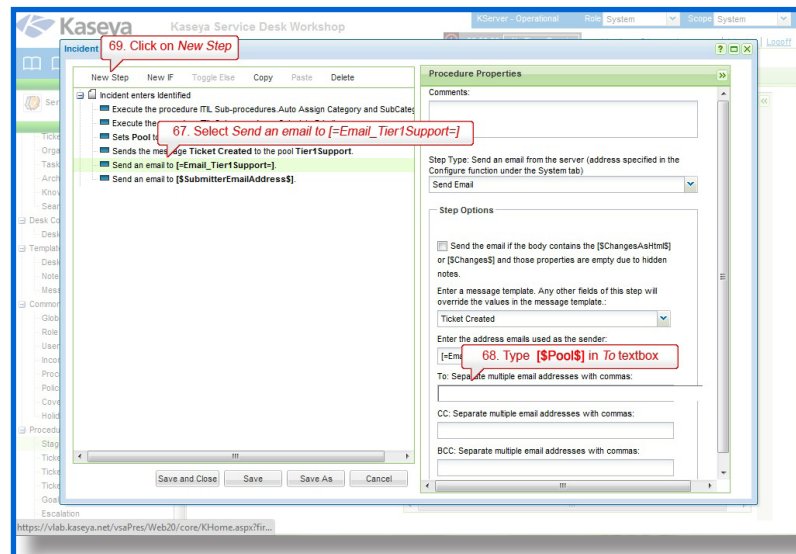
62. Go to *Stage Entry and Exit* page.
63. Select *Incident Enters Identified* procedure.
64. Click on *Edit Procedure*.



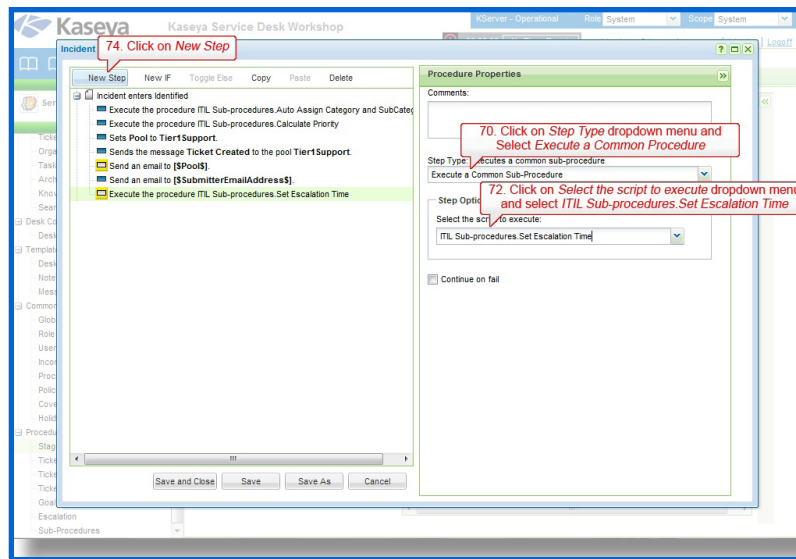
65. Select the last step, namely, the *Set Escalation Time* step.
66. Click on *Delete*.



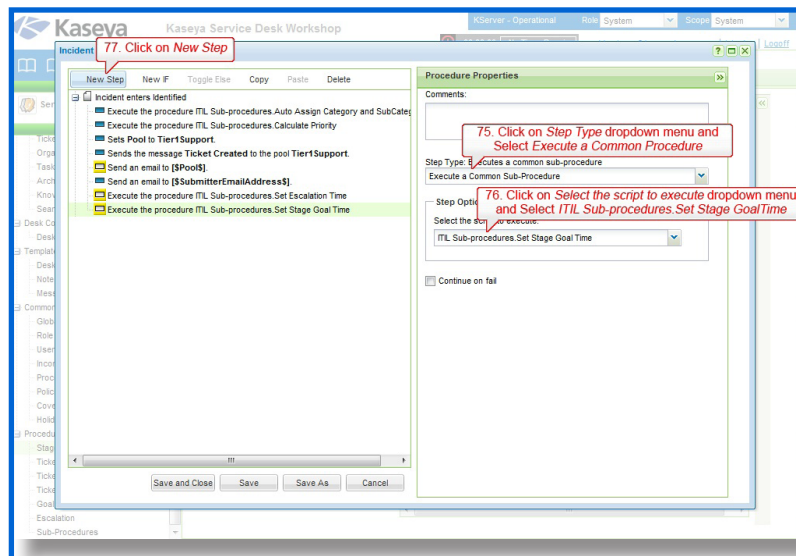
67. Select Send an email to [=Email_Tier1Support=] step.
68. Type [=Email_Tier1Support=] in To: textbox.
69. Click on *New Step*.



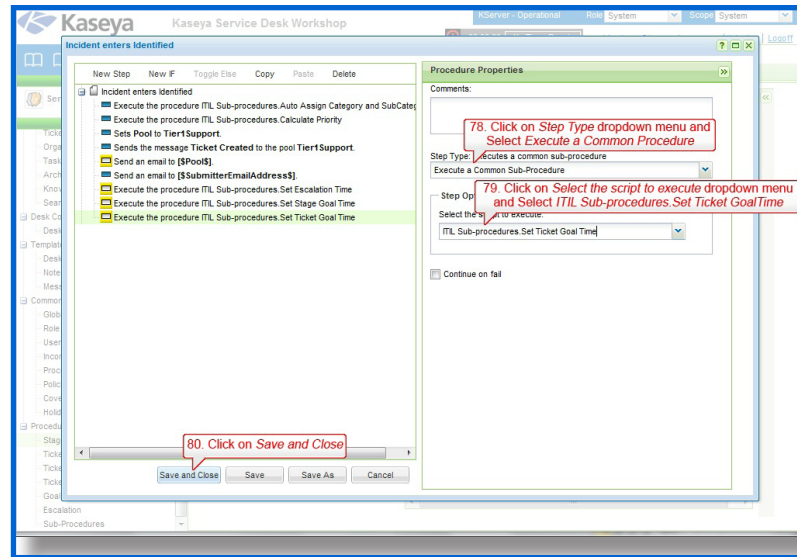
70. Click on *Step Type* dropdown menu
71. Select *Execute a Common Procedure*.
72. Click on *Select the script to execute* dropdown menu
73. Select *ITIL Sub-procedures.Set Escalation Time*.
74. Click on *New Step*.



75. Click on Step Type dropdown menu and Select *Execute a Common Procedure*.
76. Click on *Select the script to execute* dropdown menu and select *ITIL Sub-procedures.Set Stage GoalTime*.
77. Click on *New Step*.

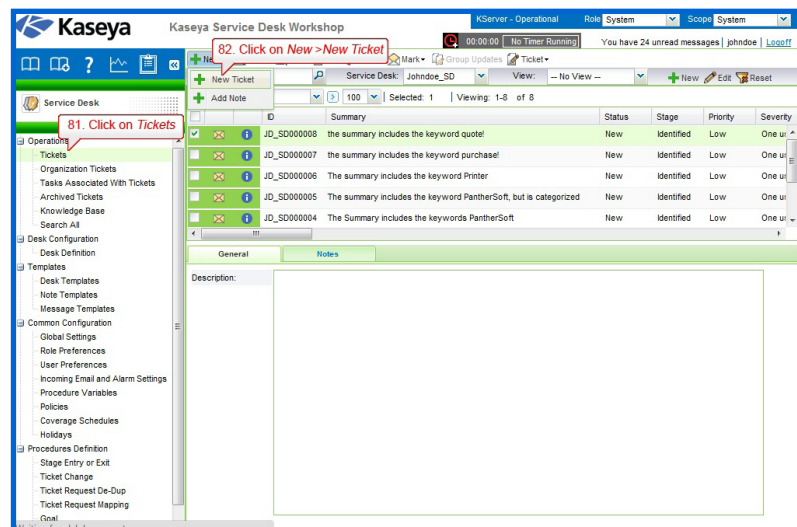


78. Click on Step Type dropdown menu and select *Execute a Common Procedure*.
79. Click on *Select the script to execute* dropdown menu and select *ITIL Sub-procedures.Set Ticket GoalTime*.
80. Click on *Save and Close*.



To verify the changes to the *Incident enters Identified* procedure and its *Calculate Priority* sub-procedures. Create 9 tickets that include all the 9 combinations of different *Severity* and *Urgency* values. Verify the calculated *Priority*. Based on the ticket creation times, calculated priorities, and default SLA coverage schedule, verify the escalation and goal times.

81. Go to *Operations > Tickets* and click on *New > New Ticket*.



82. Type **Test#1** in the Summary textbox.
83. Click on *Urgency* dropdown menu and Select *High*.
84. Click on *Severity* dropdown menu and Select *Whole Company(High)*

Repeat the above steps for other 8 tickets using combination of different Severity and Urgency.

Summary	St...	Priority	Severity	Created	Due	Escalation	Stage Goal	Urgency	Source
Test#9	New	Planning	One user (Low)	8:41:27 pm 11-Jul-12	12:00:00 pm 10-Oct-12	4:00:00 pm 23-Jul-12	9:00:00 am 03-Aug-12	Low	Call
Test#8	New	Low	Multiple users (Medium)	8:40:59 pm 11-Jul-12	12:00:00 pm 27-Aug-12	4:00:00 pm 17-Jul-12	9:00:00 am 24-Jul-12	Low	Call
Test#7	New	Medium	Whole Company (High)	8:40:31 pm 11-Jul-12	12:00:00 pm 03-Aug-12	9:00:00 am 12-Jul-12	9:00:00 am 16-Jul-12	Low	Call
Test#6	New	Low	One user (Low)	8:40:06 pm 11-Jul-12	12:00:00 pm 27-Aug-12	4:00:00 pm 17-Jul-12	9:00:00 am 24-Jul-12	Medium	Call
Test#5	New	Medium	Multiple users (Medium)	8:39:42 pm 11-Jul-12	12:00:00 pm 03-Aug-12	9:00:00 am 12-Jul-12	9:00:00 am 16-Jul-12	Medium	Call
Test#4	New	High	Whole Company (High)	8:39:15 pm 11-Jul-12	12:00:00 pm 24-Jul-12	4:00:00 pm 12-Jul-12	9:00:00 am 16-Jul-12	Medium	Call
Test#3	New	Medium	One user (Low)	8:38:43 pm 11-Jul-12	12:00:00 pm 03-Aug-12	9:00:00 am 12-Jul-12	9:00:00 am 16-Jul-12	High	Call
Test#2	New	High	Multiple users (Medium)	8:38:17 pm 11-Jul-12	12:00:00 pm 24-Jul-12	4:00:00 pm 12-Jul-12	9:00:00 am 16-Jul-12	High	Call
Test#1	New	Critical	Whole Company (High)	8:35:19 pm 11-Jul-12	4:00:00 pm 13-Jul-12	12:00:00 pm 12-Jul-12	9:00:00 am 13-Jul-12	High	Call

1. Ticket enters Tier1

When a ticket enters Tier1, do the following

If the ticket has already been assigned to an individual, make that individual to be the owner of the ticket. The owner of a ticket is the person who is ultimately responsible for resolving the ticket.

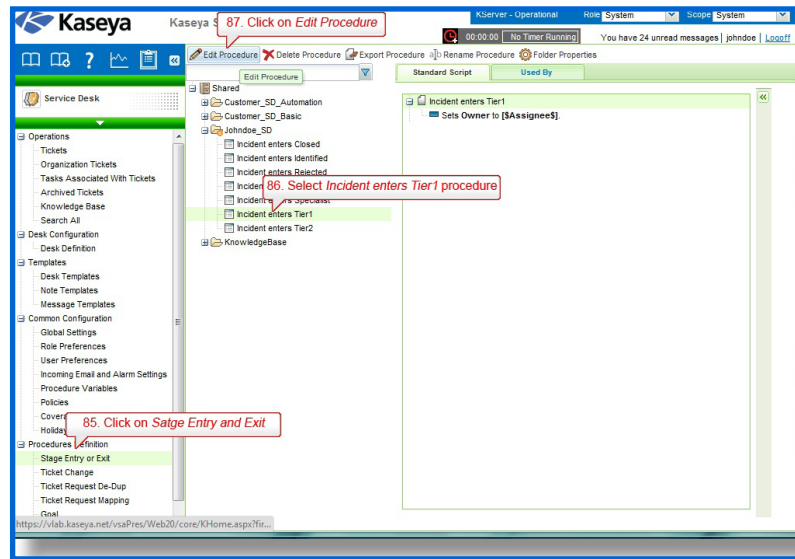
The stage escalation and goal times must be reset based on the freshly calculated priority.

The status of the ticket should reflect that it is in progress. The stage escalation and goal times must be reset based on the freshly calculated priority.

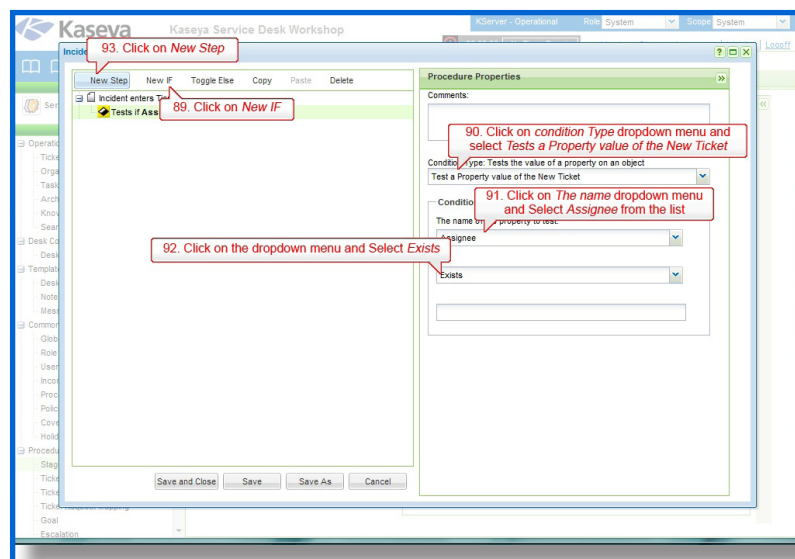
85. Go to *Stage Entry and Exit* page.

86. Select *Incident enters Tier1* procedure.

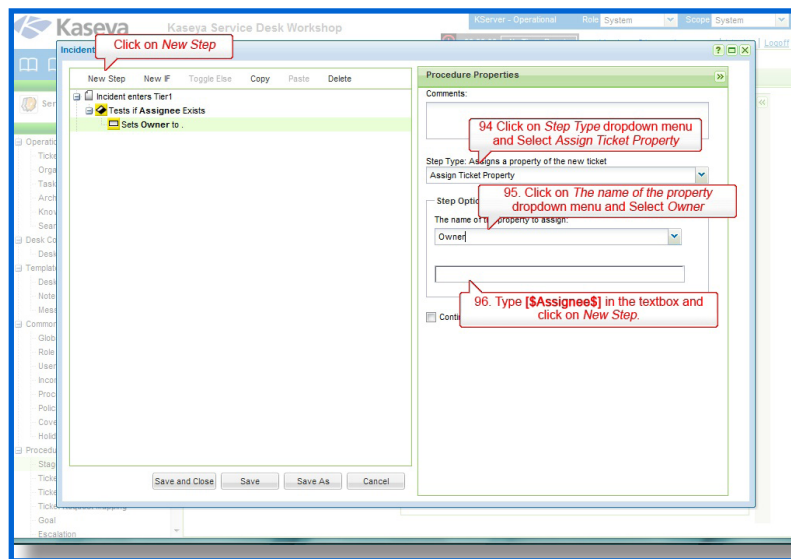
87. Click on *Edit Procedure*.



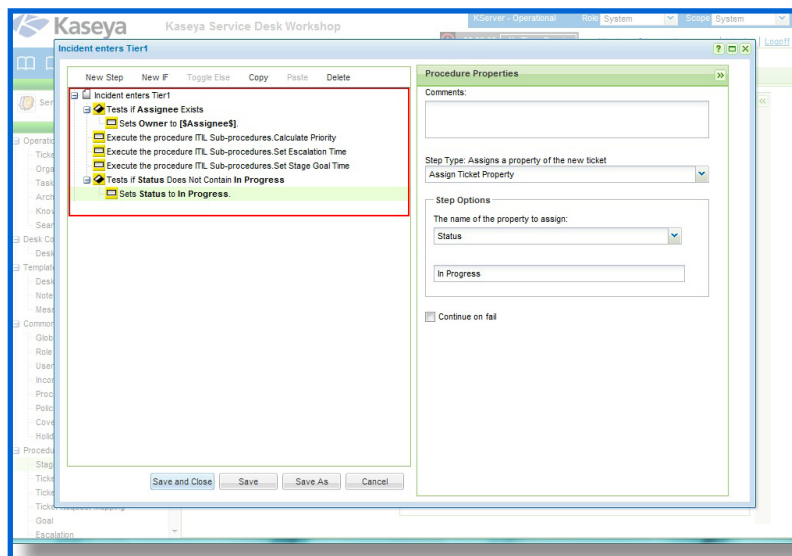
88. Click on *Sets Owner to [\$Assignee\$]* step and click on *Delete*.
89. Click on *New IF*.
90. Click on *Condition Type* dropdown menu and select *Tests a Property value of the New Ticket*.
91. Click on *The name of the property test* dropdown menu and Select *Assignee* from the list.
92. Click on the dropdown menu and Select *Exists*.
93. Click on *New Step*.



94. Click on *Step Type* dropdown menu and Select *Assign Ticket Property*.
95. Click on *The name of the property* dropdown menu and Select *Owner*.
96. Type **[\$Assignee\$]** in the textbox and click on *New Step*.



Repeat the above steps.



Note: When a VSA user sets the *Assigned To* field (in the ticket editing form) to a specific SD technician, the *Assignee* ticket property is set to the SD technician and the *Pool* ticket property does not exist anymore. Vice versa, when a VSA user sets the *Assigned To* field (in the ticket editing form) to a specific pool, the *Pool* ticket property is set to the pool and the *Assignee* ticket property does not exist anymore.

Note: When a ticket transits to a new stage, the *Escalation Level* is reset to 0, and the *Escalation Time* and *Stage Goal Time* are reset to the values defined in the stage. If you want to set the *Escalation Time* and *Stage Goal Time* based on the calculated *Priority* of the ticket, you need to set them using the *Set Escalation Time* and *Set Goal Time* commands.

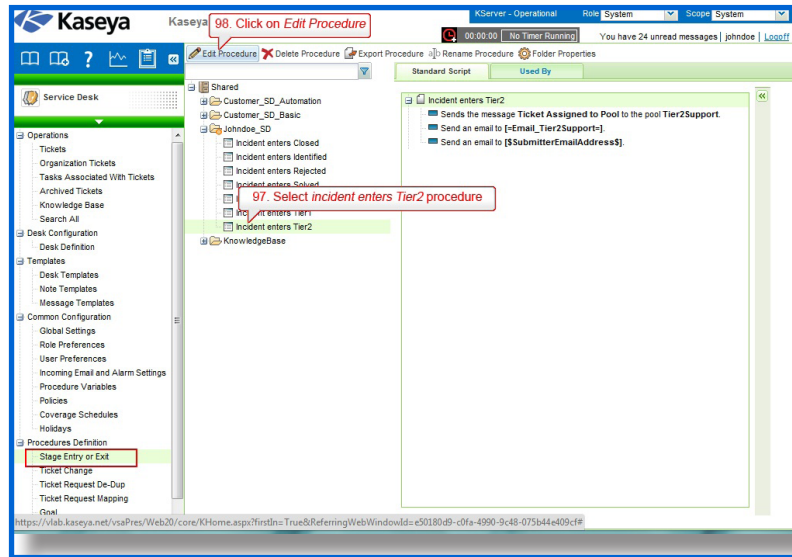
2. Ticket enters Tier2

No matter who is the *Assignee* of the ticket, when ticket transits to *Tier2*, it must be assigned to *Tier2Support* pool. Notify the tier2 members by VSA message and tier2 and submitter by email. The *Escalation Time* and *Stage Goal Time* must be reset based on the freshly calculated *Priority*. The *Status* must be *In Progress*.

You need to set the *Pool* to *Tier2Support* pool. You need to use *Pool* instead of *Email_Tier2Support* to address the inconsistency issue. You need to call the sub-procedures for calculating the priority and for setting the escalation and stage goal times. You need to make sure that *Status* is *In Progress*.

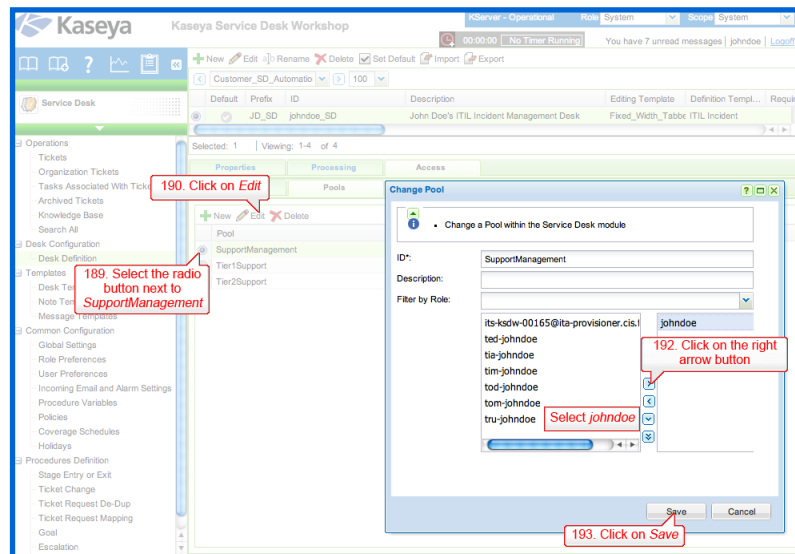
97. Select *Incident enters Tier2* procedure.

98. Click on *Edit Procedure*.



99. Select *Send an email* Step.

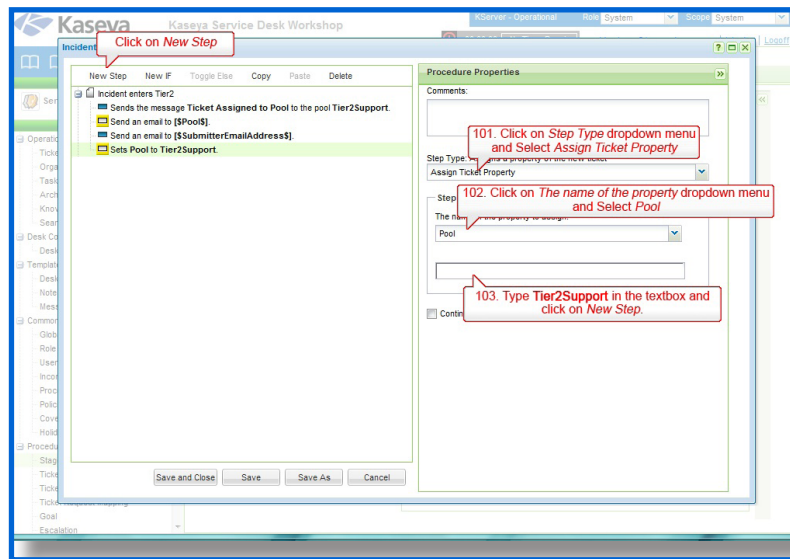
100. Type **[\$Pool\$]** in the *To* textbox and click on *New Step*.



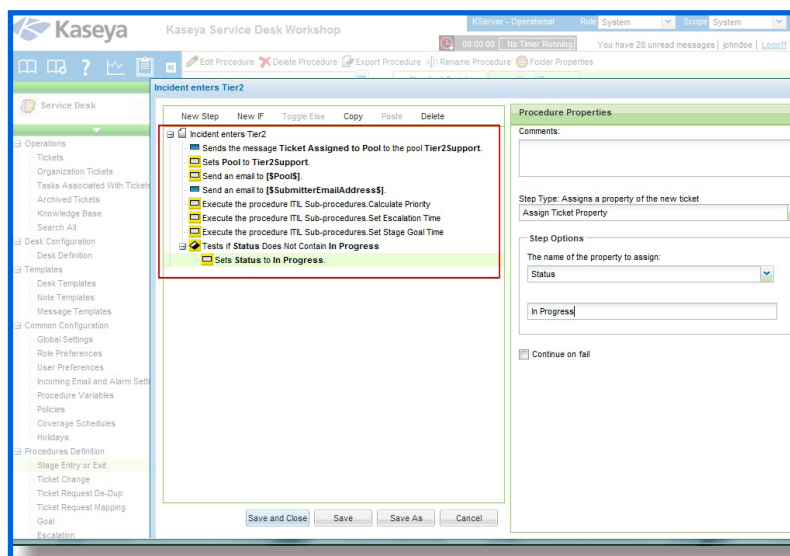
101. Click on *Step Type* dropdown menu and Select *Assign Ticket Property*.

102. Click on *The name of the property* dropdown menu and Select *Pool*.

103. Type **Tier2Support** in the textbox and click on *New Step*.



Repeat the above steps.



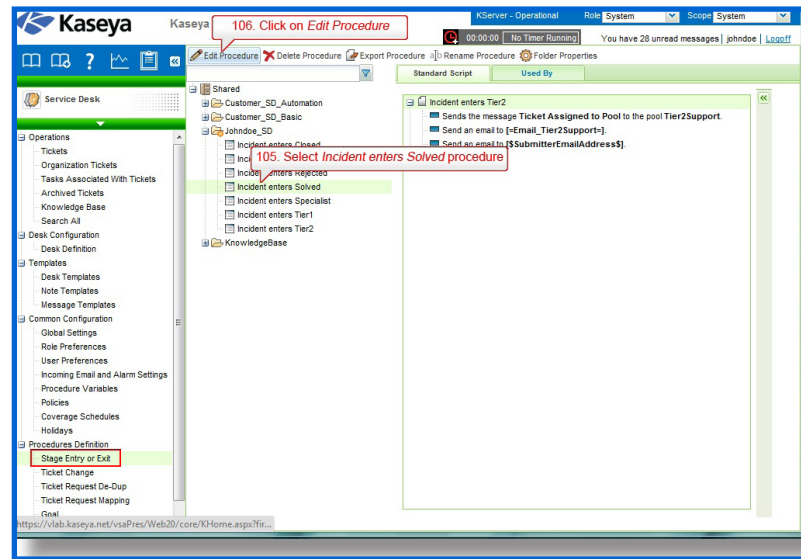
3. Ticket enters Solved

Notify the submitter by email. The *Escalation Time* and *Stage Goal Time* must be reset based on the freshly calculated *Priority*. *Status* must be *Solved*.

104. Then

105. Select *Incident enters Solved* procedure.

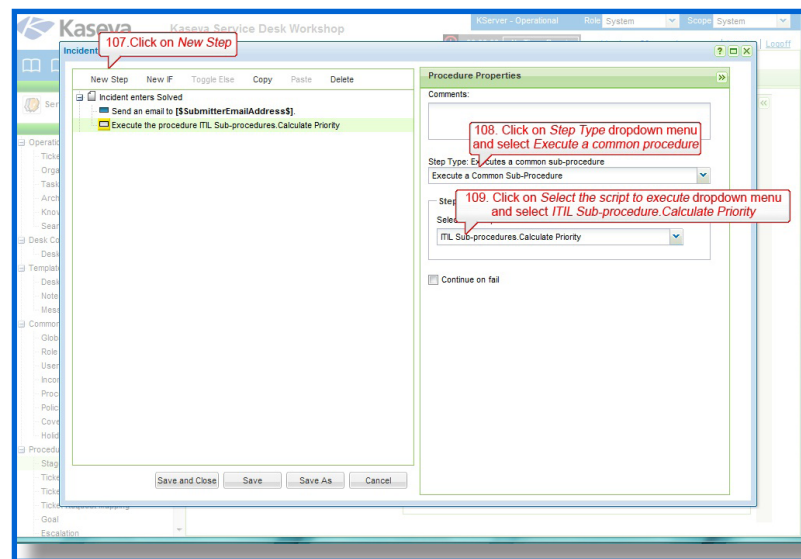
106. Click on *Edit Procedure*.



107. Click on *New Step*.

108. Click on *Step Type* dropdown menu and select *Execute a common procedure*.

109. Click on *Select the script to execute* dropdown menu and select *ITIL Sub-procedure. Calculate Priority*.



4. Ticket enters Closed

Notify the submitter by email. *Status* must be *Closed*. To adjust the procedure.

110. Double-click on *Incident enters Closed* procedure.

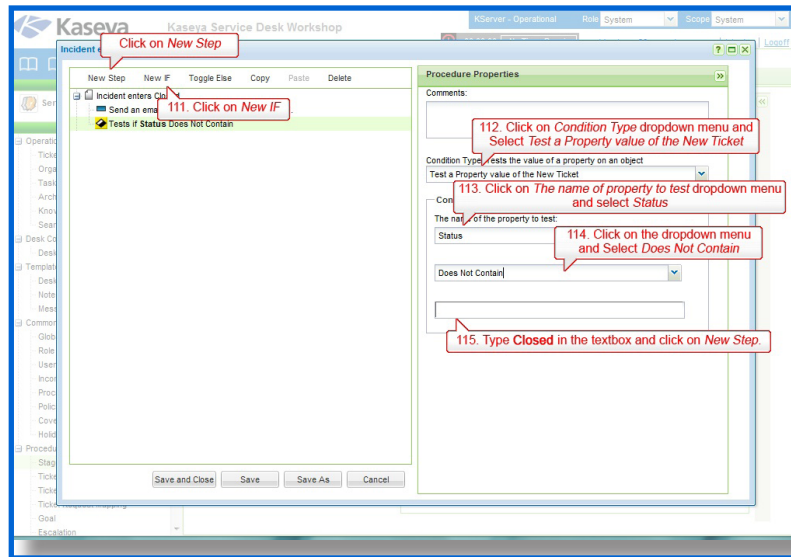
111. Click on *New IF*.

112. Click on *Condition Type* dropdown menu and Select *Test a Property value of the New Ticket*.

113. Click on *The name of property to test* dropdown menu and select *Status*.

114. Click on the dropdown menu and Select *Does Not Contain*.

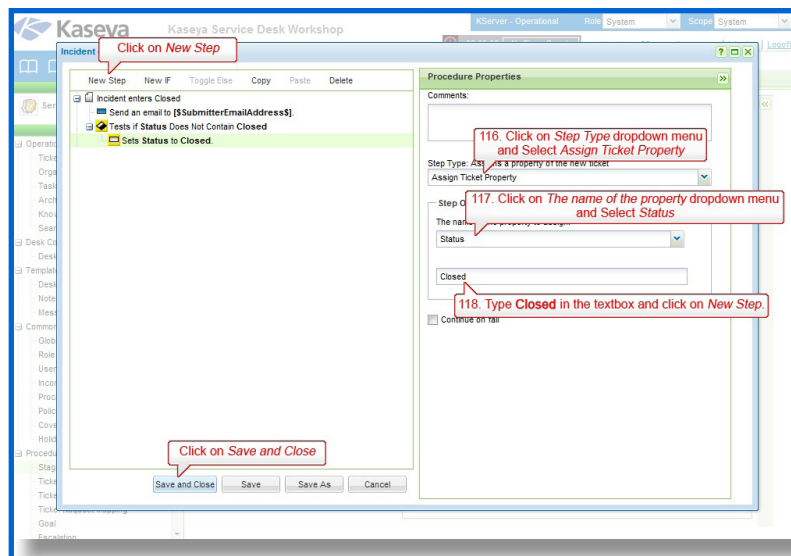
115. Type **Closed** in the textbox and click on **New Step**.



116. Click on **Step Type** dropdown menu and Select **Assign Ticket Property**.

117. Click on **The name of the property** dropdown menu and Select **Status**.

118. Type **Closed** in the textbox and click on **New Step** then click on **Save and Close**.



5. Stage escalated

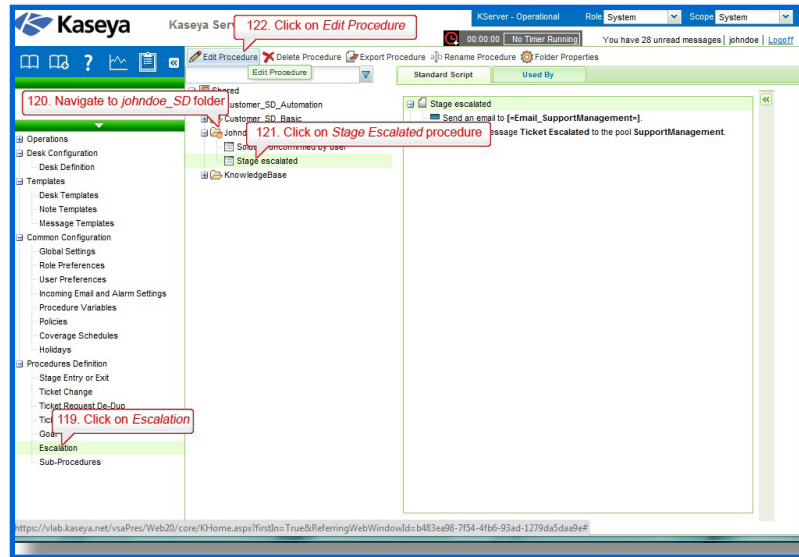
For the *Identified*, *Tier1*, and *Tier2* stages:

- If the ticket has been assigned to an individual, notify the individual by email.
- Make sure that the ticket is assigned properly to the pool associated with the stage and then notify the pool by email.
- Ticket should be escalated at most twice in a stage.

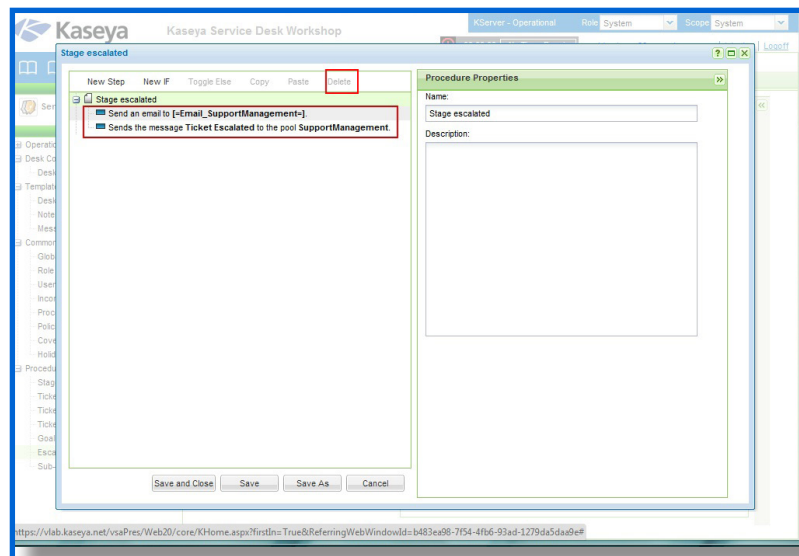
If *Assignee* exists, notify by email. Set *Pool* to *Tier1Support*, if in *Identified* or *Tier1* stage; Set *Pool* to *Tier2Support*, if in *Tier2* stage. Notify the pool by email. If *Escalation Level* is equal to one, then call *Set*

Escalation Time sub-procedure.

119. Go to *Escalation* page.
120. Navigate to <USERNAME>_SD folder.
121. Click on *Stage Escalated* procedure.
122. Click on *Edit* procedure.

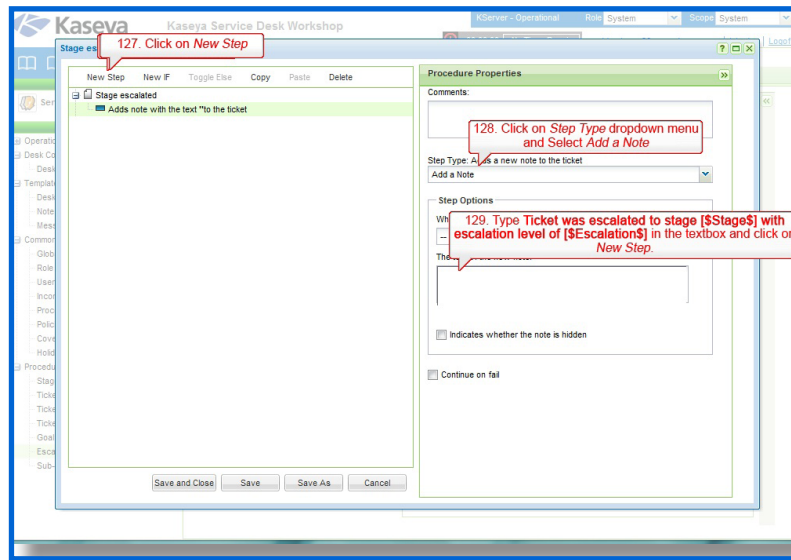


123. Select *Send an email to* Step.
124. Click on *Delete* button.
125. Select *Sends the message* Step.
126. Click on *Delete* button.

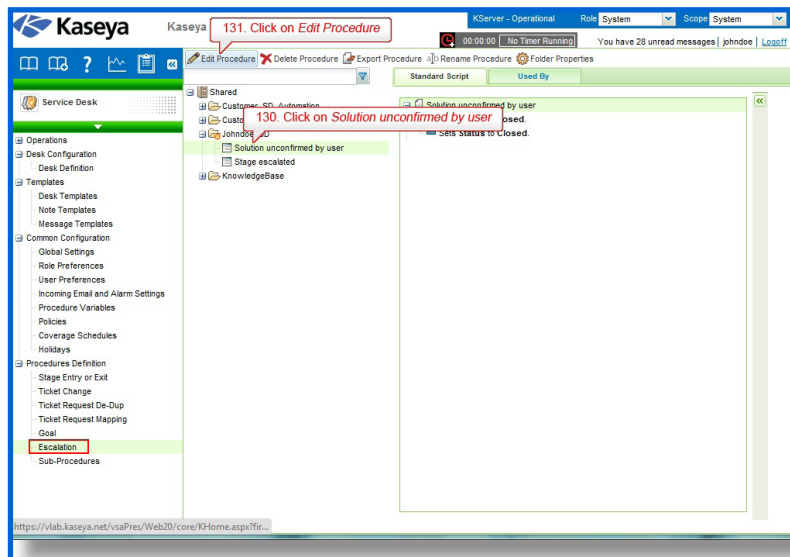


127. Click on *New Step*.
128. Click on *Step Type* dropdown menu and Select *Add a Note*.

129. Type **Ticket was escalated to stage [\$Stage\$]** with escalation level of **[\$Escalation\$]** in the textbox and click on **New Step**.



Repeat the steps and finish adding steps to the procedure and click on **Save and Close**.



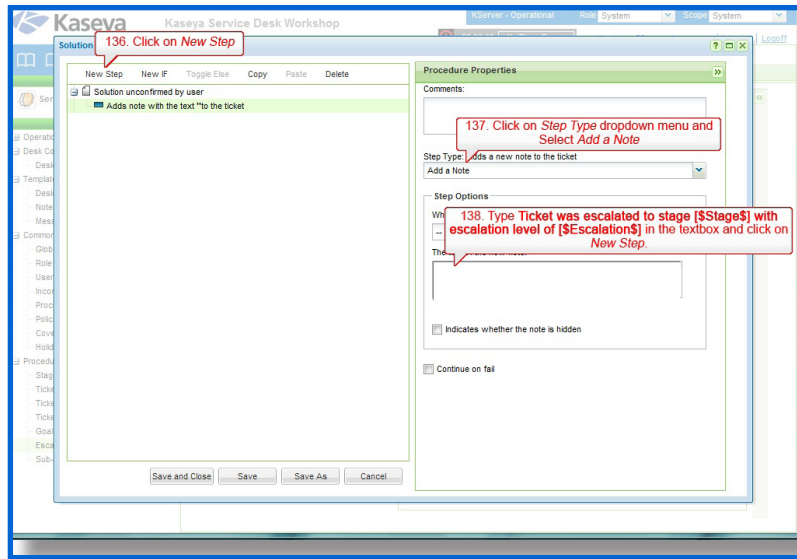
6. Solution unconfirmed by user

For the *Solved* stage:

- Notify the submitter by email.
- Ticket should be escalated at most twice in a stage.
- Notify the submitter by email.
- If *Escalation Level* is equal to one, then call *Set Escalation Time* sub-procedure.

130. Click on *Solution unconfirmed by user* procedure.

131. Click on *Edit Procedure*.

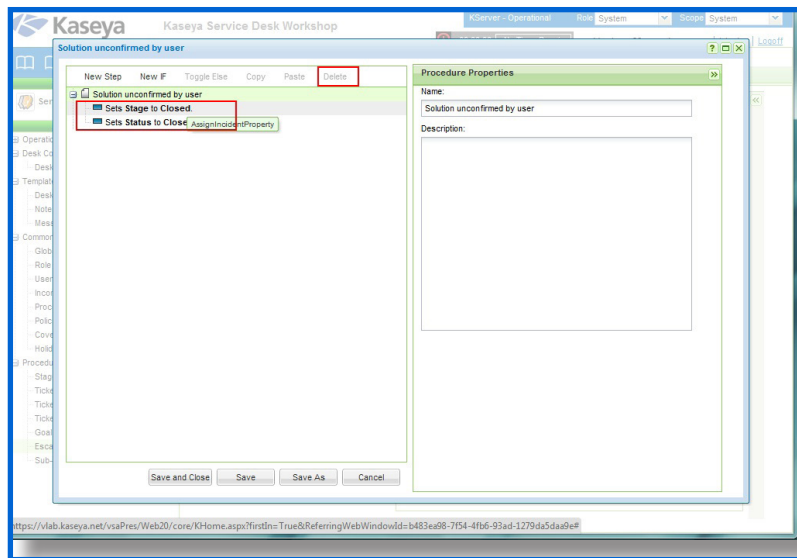


132. Select *Sets Stage to Closed* step.

133. Click on *Delete* button.

134. Select *Sets Status to Closed* step.

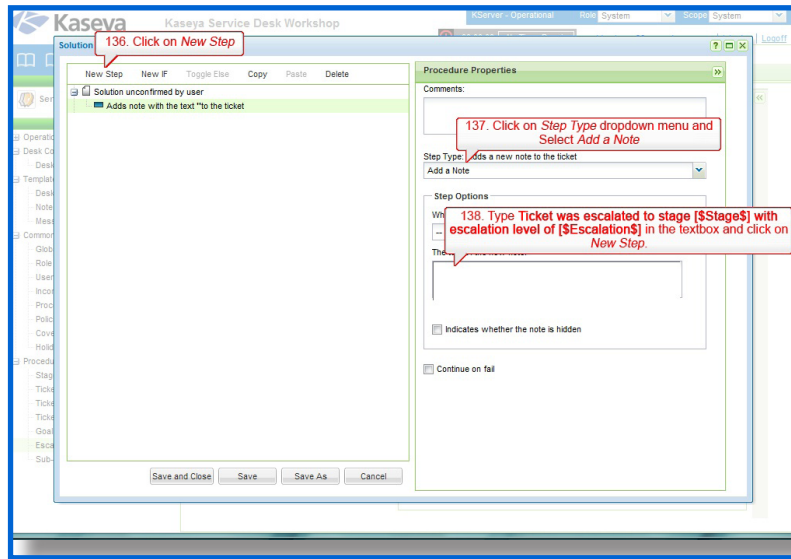
135. Click on *Delete* button.



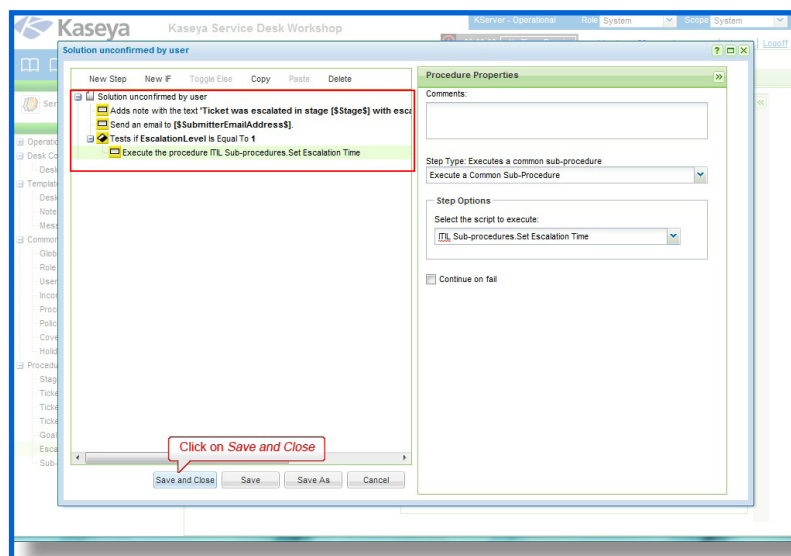
136. Click on *New Step*.

137. Click on *Step Type* and select *Add a Note*.

138. Type **Ticket was escalated to stage [\$Stage\$] with escalation level of [\$Escalation\$]** in the textbox and click on *New Step*.



Repeat the steps and complete modifying the procedure and click on *Save and Close*.



7-11 Goal Procedures

Recall that all the goal procedures were left empty. You would want if the ticket misses its goal, the support management to be notified. If the ticket is in *Identified* or *Tier1*, it should move to *Tier1* or *Tier2*, respectively. If the ticket misses its goal in *Tier2*, the support management must be notified. If the ticket misses its goal in *Solved*, the *Assignee* or *Pool* must be notified.

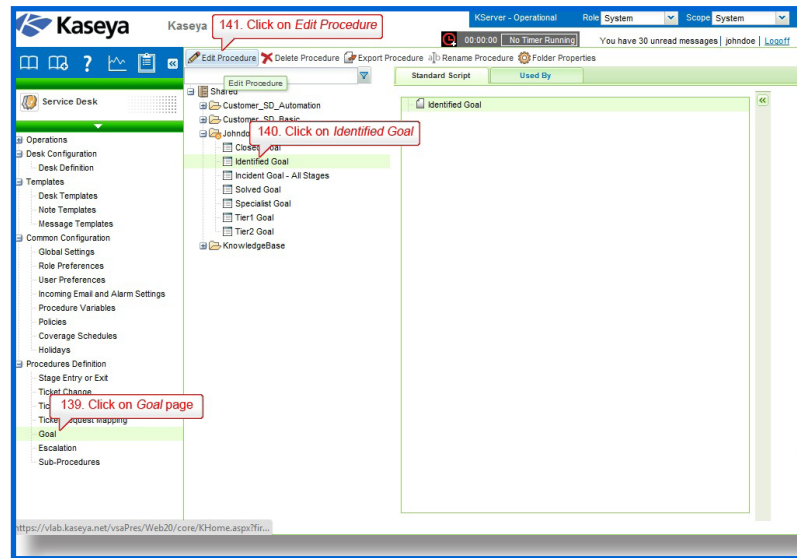
Note: We add a note for testing purposes at the beginning of each goal procedure. If you add notes for testing purposes, you should remove them when done with your testing.

Finally, you should delete the extra stage goal procedures to avoid any confusion in the future and to make your desk look as simple as possible.

139. Go to *Goal* page.

140. Click on *Identified Goal* procedure.

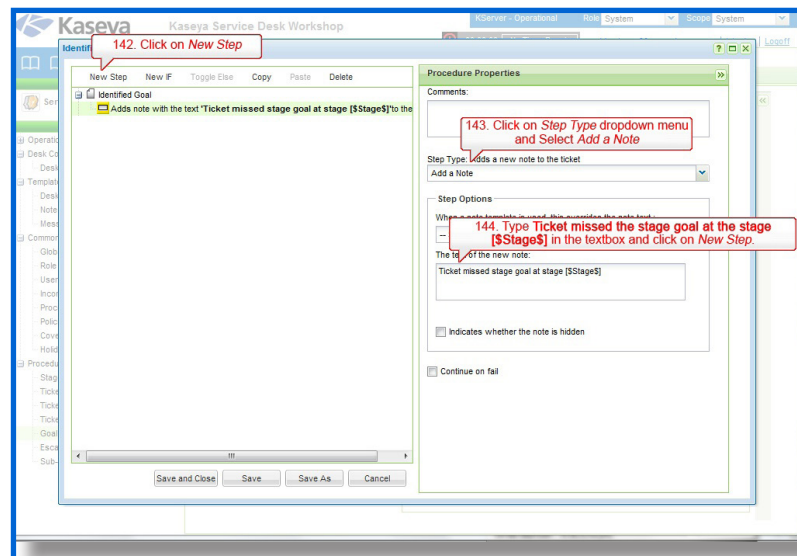
141. Click on *Edit Procedure*.



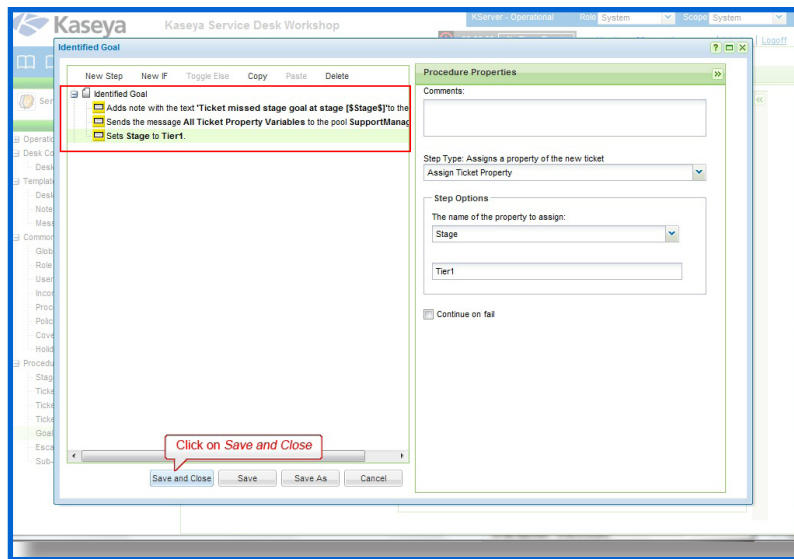
142. Click on *New Step*.

143. Click on *Step Type* dropdown menu and select *Add a Note*.

144. Type **Ticket missed the stage goal at the stage [Stage\$]** in the textbox and click on *New Step*.

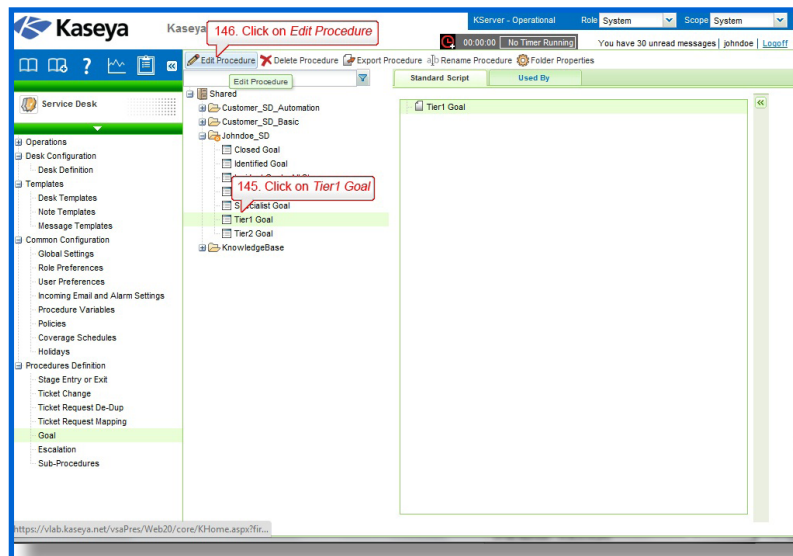


Repeat the steps and complete modifying the procedure and click on *Save and Close*.



145. Click on *Tier1 Goal* procedure.

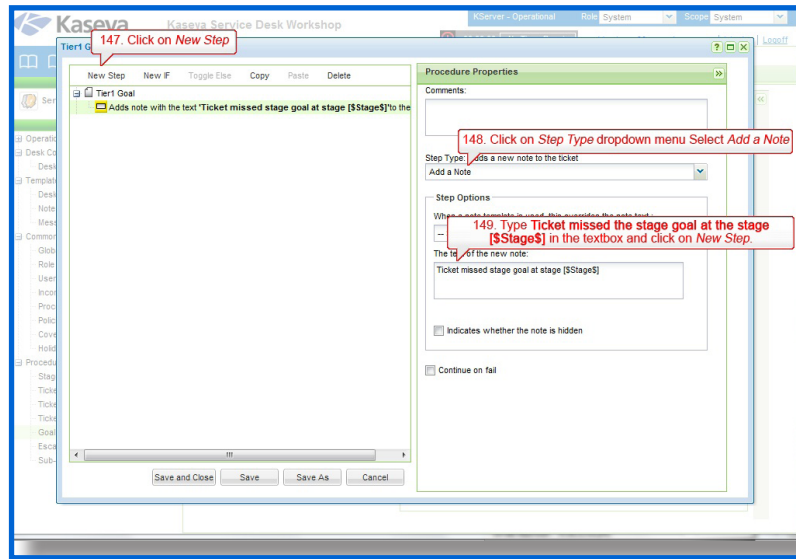
146. Click on *Edit Procedure*.



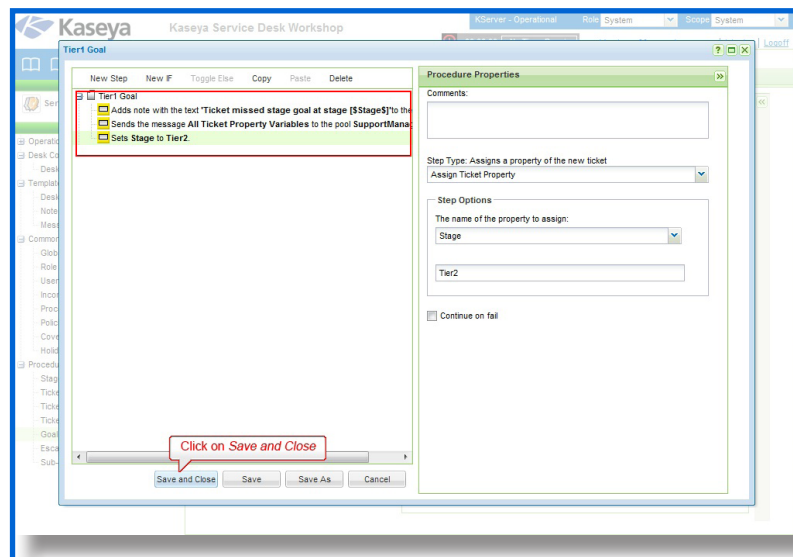
147. Click on *New Step*.

148. Click on *Step Type* dropdown menu and select *Add a Note*.

149. Type **Ticket missed the stage goal at the stage [Stage]** in the textbox and click on *New Step*.

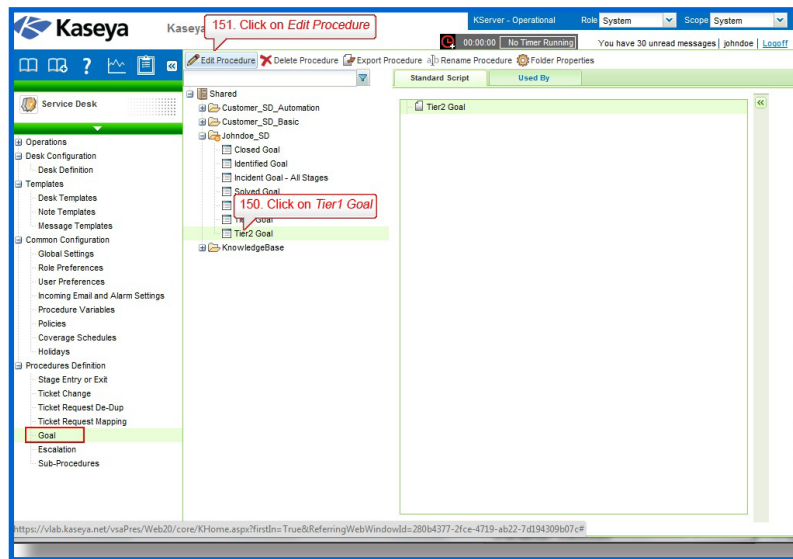


Repeat the steps and complete modifying the procedure and click on *Save and Close*.



150. Click on *Tier1 Goal* procedure.

151. Click on *Edit Procedure*.

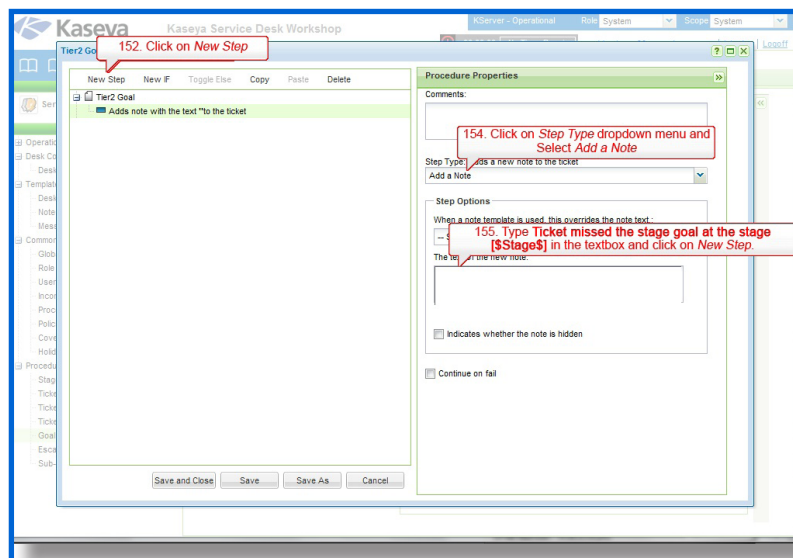


152. Click on *New Step*.

153. Then

154. Click on *Step Type* dropdown menu and select *Add a Note*.

155. Type **Ticket missed the stage goal at the stage [\$\$Stage\$]** in the textbox and click on *New Step*.

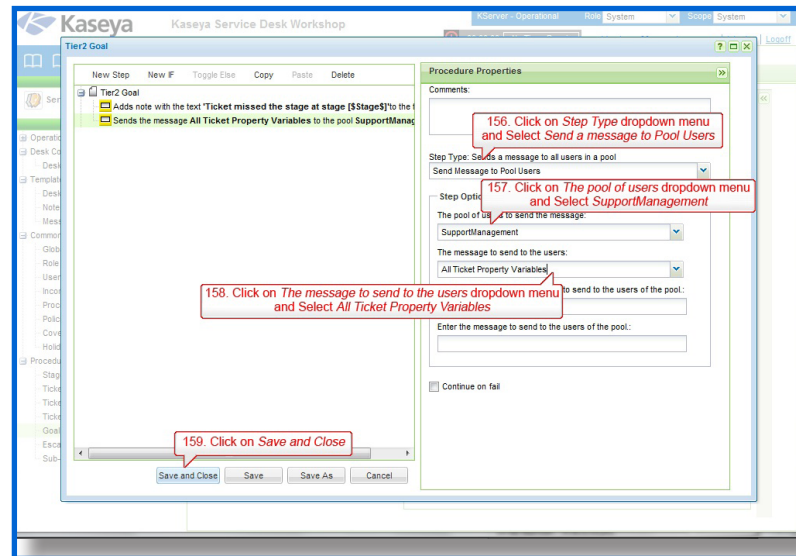


156. Click on *Step Type* dropdown menu and Select *Send a message to Pool Users*.

157. Click on *The pool of users* dropdown menu and Select *SupportManagement*.

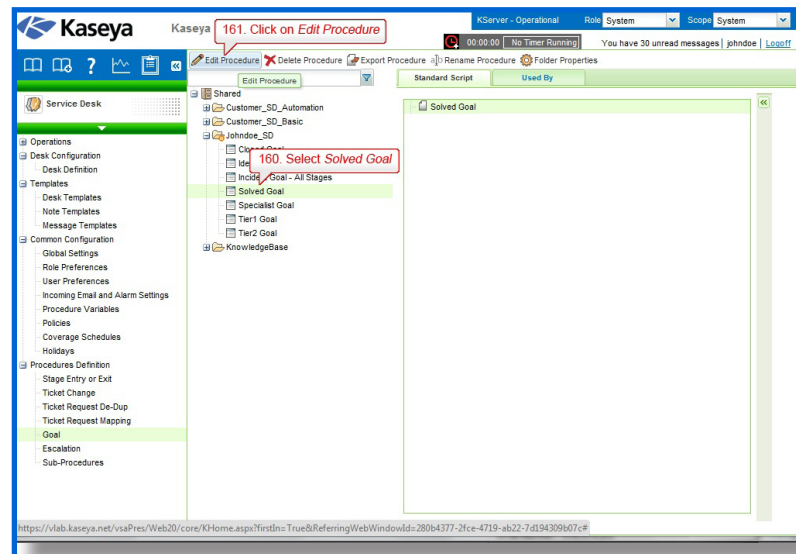
158. Click on *The message to send to the users* dropdown menu and Select *All Ticket Property Variables*.

159. Click on *Save and Close*



160. Select *Solved Goal* procedure

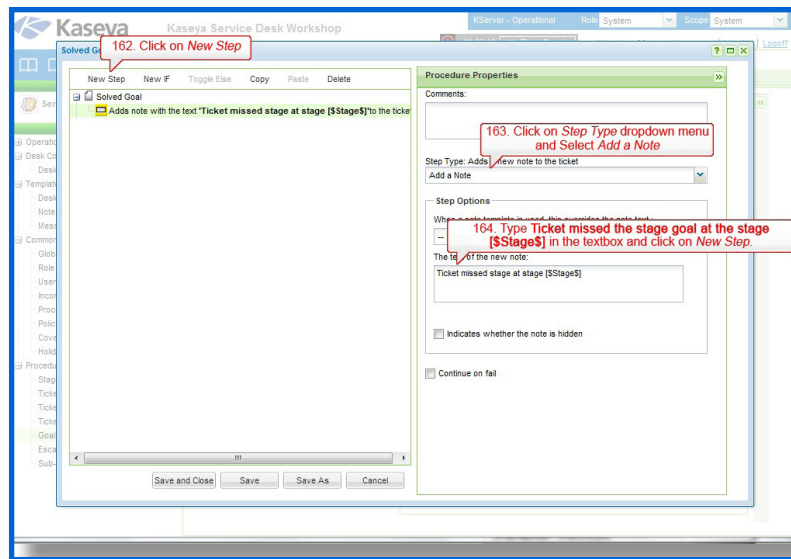
161. Click on *Edit Procedure*.



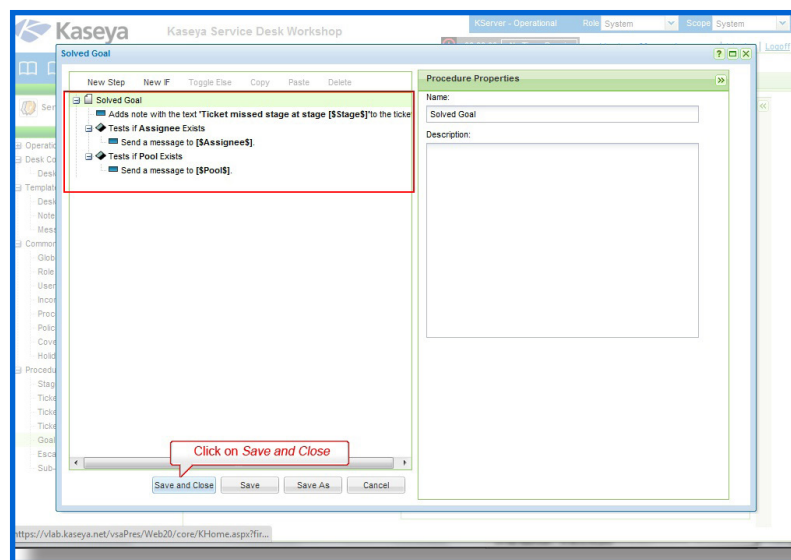
162. Click on *New Step*.

163. Click on *Step Type* dropdown menu and Select *Add a Note*

164. Type **Ticket missed the stage goal at the stage [\$\$Stage\$]** in the textbox and click on *New Step*.



Repeat the steps and complete modifying the procedure and click on *Save and Close*



165. Go to *Desk Definition*.

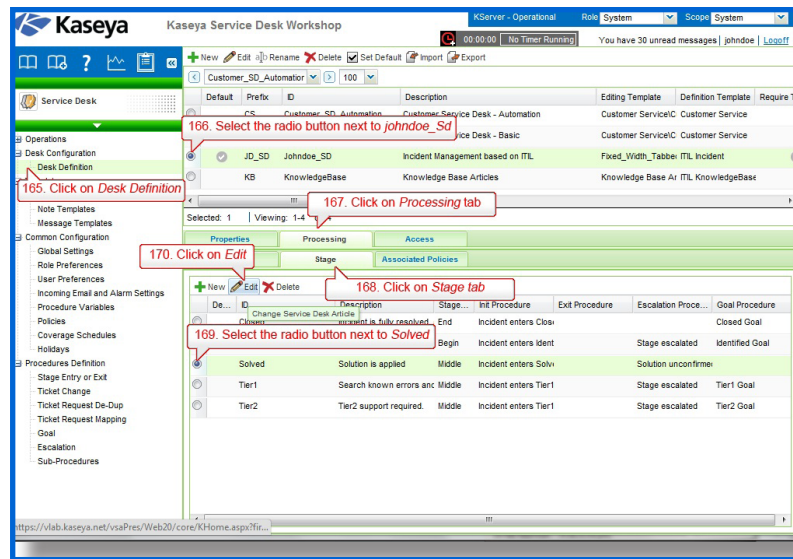
166. Select the radio button next to <USERNAME>_SD.

167. Click on *Processing* tab.

168. Click on *Stage* tab.

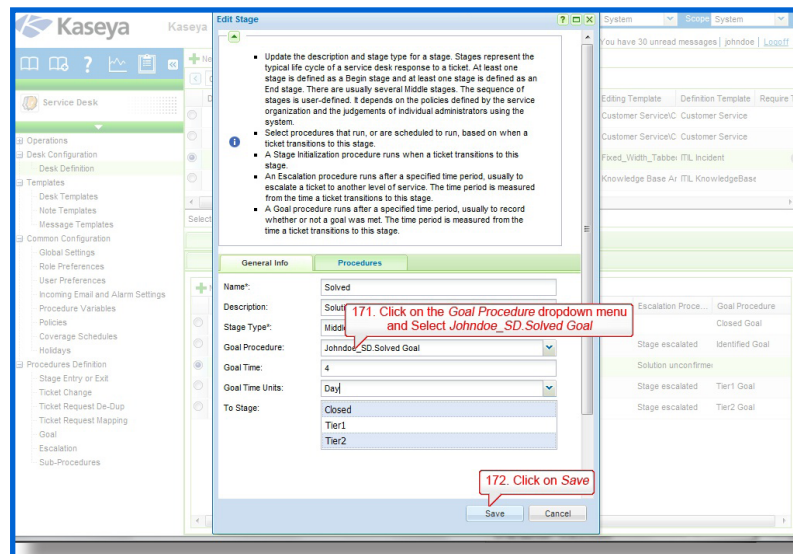
169. Select the radio button next to *Solved*.

170. Click on *Edit*.



171. Click on the Goal Procedure dropdown menu and Select <USERNAME>_SD.Solved Goal.

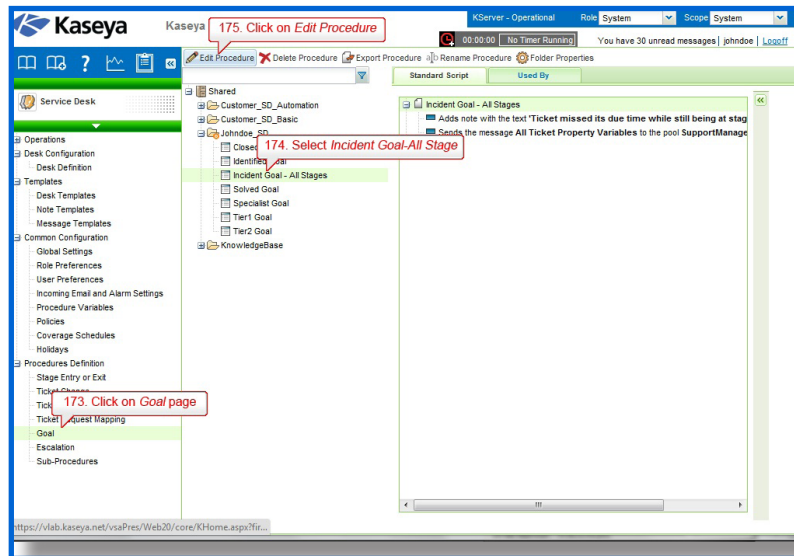
172. Click on Save.



173. Go to Goal page.

174. Select Incident Goal-All Stage procedure

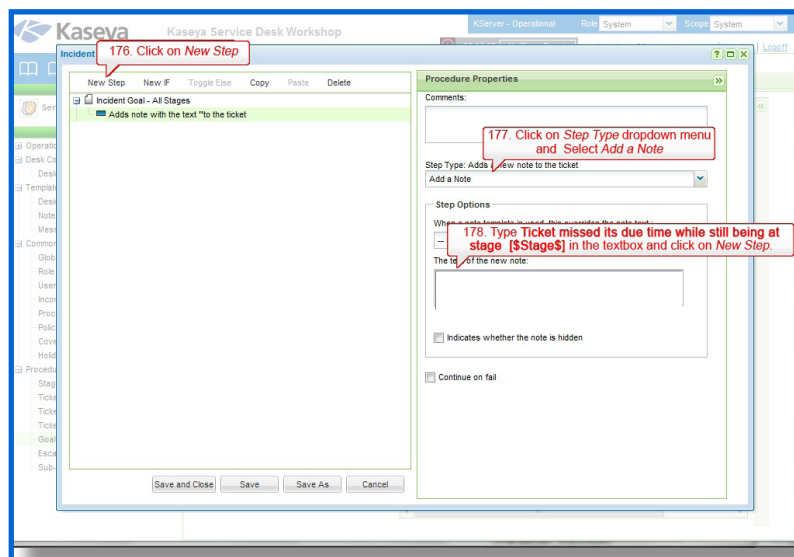
175. Click on Edit.



176. Click on New Step.

177. Click on *Step Type* dropdown menu and Select *Add a Note*

178. Type **Ticket missed its due time while still being at stage [Stage]** in the textbox and click on *New Step*.

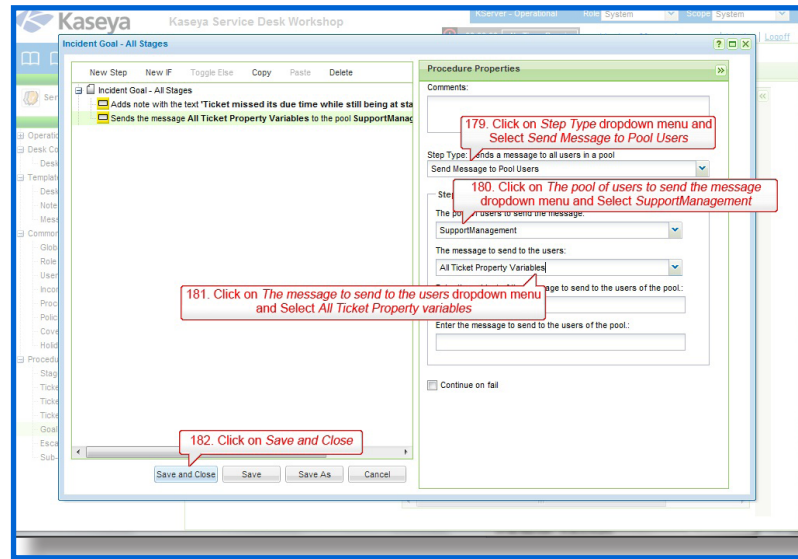


179. Click on *Step Type* dropdown menu and Select *Send Message to Pool Users*.

180. Click on *The pool of users to send the message* dropdown menu and Select *SupportManagement*.

181. Click on *The message to send to the users* dropdown menu and Select *All Ticket Property variables*.

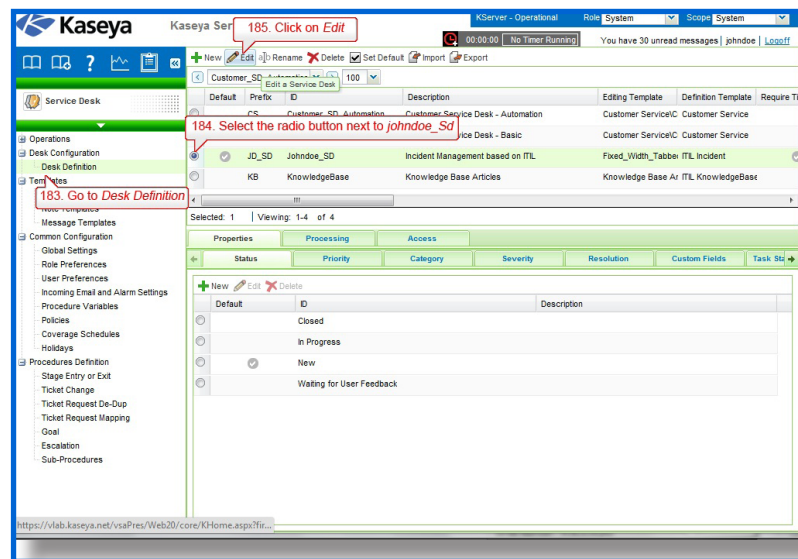
182. Click on *Save and Close*.



183. Go to *Desk definition*.

184. Select the radio button next to `<USERNAME>_SD`.

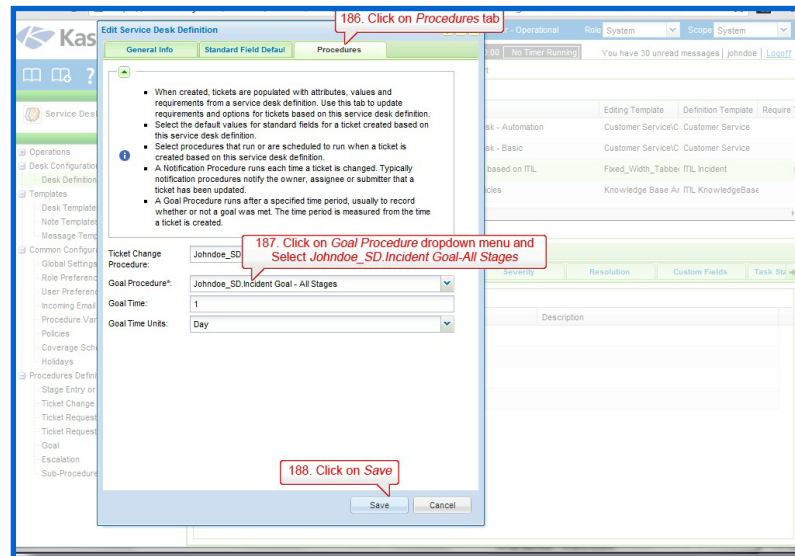
185. Click on *Edit*.



186. Click on *Procedures* tab.

187. Click on *Goal Procedure* dropdown menu and Select `<USERNAME>_SD.Incident Goal-All Stages`.

188. Click on *Save*.



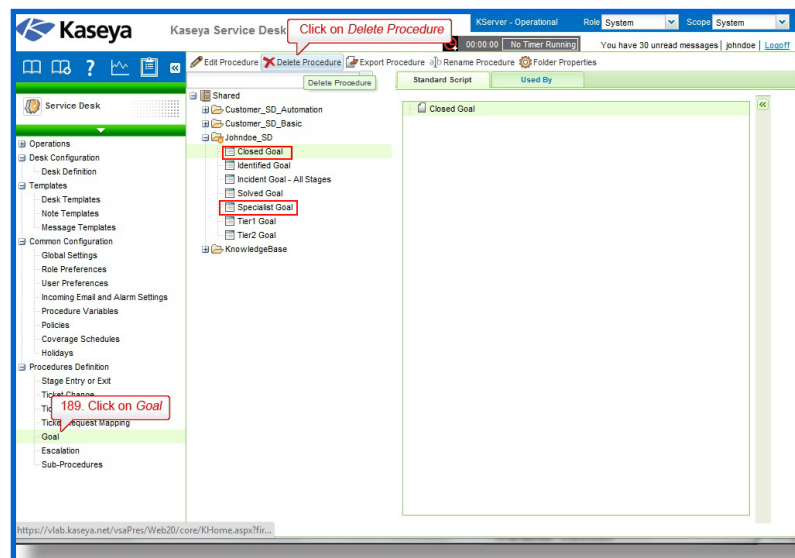
-Finally, you should delete the extra stage goal procedures to avoid any confusion in the future and to make your desk look as simple as possible

189.Go to *Goal* page

190.Select the procedures that are not being used.

191.Click on *Delete* Procedure.

192..Delete



12. Ticket is Changed

If a SD technician changes a ticket while it is in the Identified stage and its Status is new, then the ticket should transit to Tier1 and be assigned to the SD technician. If the stage of the ticket has not changed, but the content of the ticket has been modified, you should notify the submitter.

To verify the changes that you have done to all the affected procedures in this part, you should develop a number of test suites. We leave this part to you. You can follow what we have done in the previous parts to accomplish this task. In this part, we only create one ticket and wait until **the due time is missed**, then

we move it to Solved and wait until the **Solved stage goal is missed**.

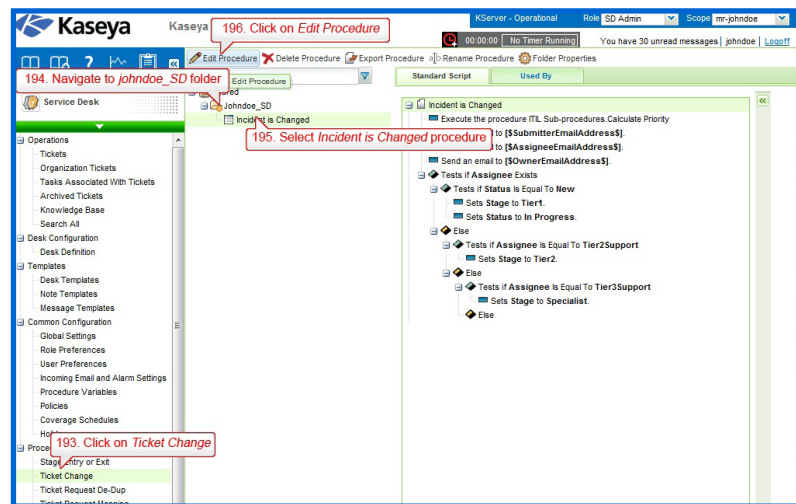
Note: To be able to see when the escalation and goal procedures are called, we added a note at the beginning of all escalation and goal procedures. We did not choose to make the notes hidden, so that the hidden notes created by VSA do not clutter our added notes. To be able to quickly see the effects of escalation and goal procedures, we temporarily modified the escalation, stage goal, and ticket due time to 1, 3, 12 min.

193. Go to *Ticket Change* page.

194. Navigate to *Shared > <USERNAME>_SD* folder.

195. Select *Incident Change* procedure.

196. Click on *Edit Procedure*.



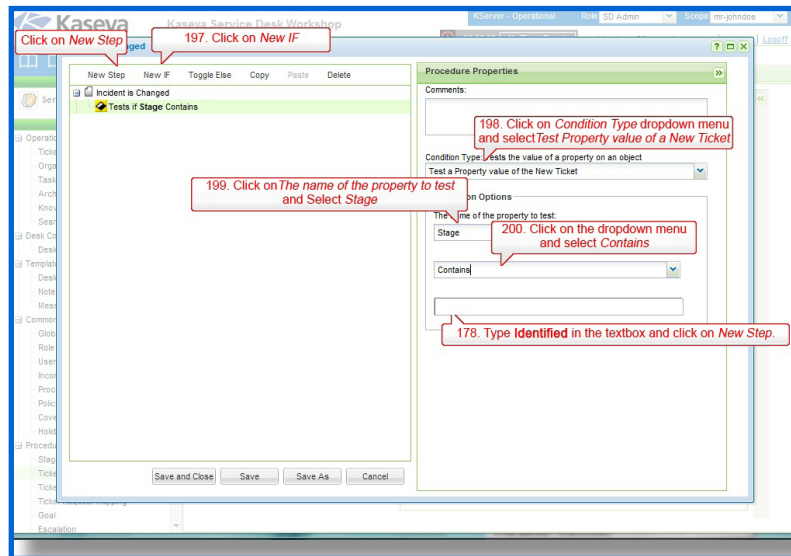
197. Click on *New IF*.

198. Click on *Condition Type* dropdown menu and select *Test Property value of a New Ticket*.

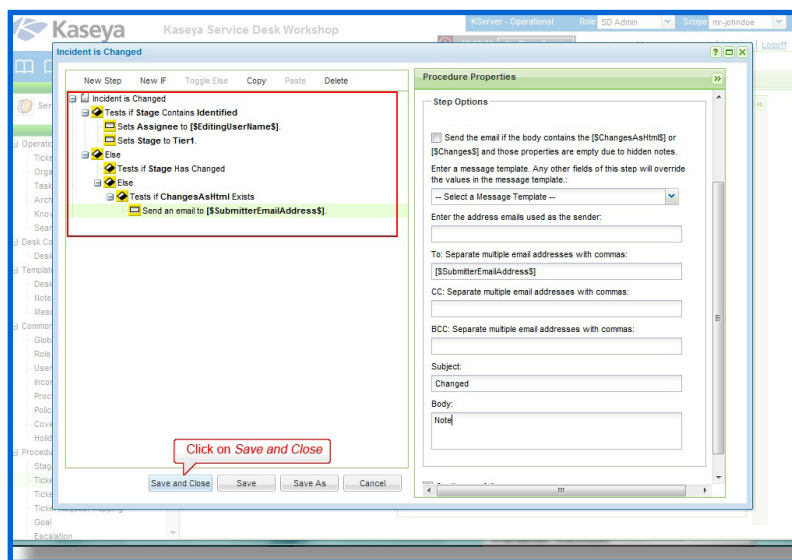
199. Click on *the Name of the property test* and select *Stage*.

200. Click on the next dropdown menu and Select *Contains*.

201. Type **Identified** in the textbox and click on *New Step*.



Repeat the steps and complete modifying the procedure and click on *Save and Close*

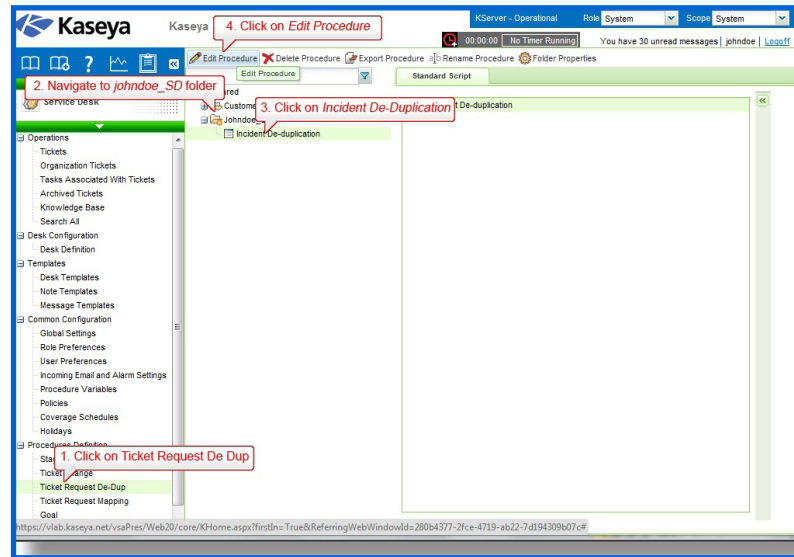


Part 12

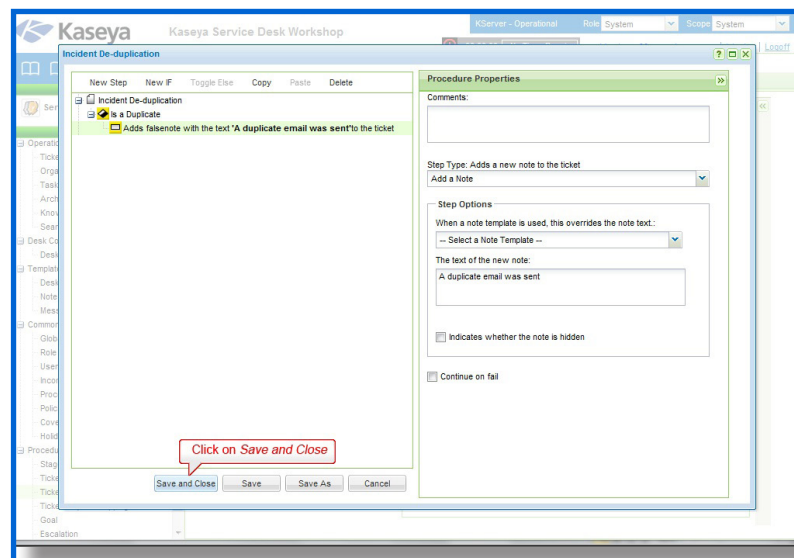
A *Ticket Request De-Dup* procedure compares a ticket request with existing tickets to determine if the ticket request is a duplicate. If a ticket request is a duplicate of existing tickets, the ticket request is canceled.

To adjust the ticket request de-dup service procedure associated with your desk, you need to follow these steps

1. Go to *Service Desk > Procedures Definition > Ticket Request De-Dup*.
2. Navigate to *Shared > <USERNAME>_SD >*
3. Click on *Incident De-Duplication*.
4. Click *Edit Procedure*.



5. Add a step to check whether the email is a duplicate by looking for a matching email sent in the past 24 hours with the same source type, first and second reference field, and the same machine id and group.
6. If the email is a duplicate, add a note to the original ticket that indicates a duplicate email was sent.
7. Click *Save and Close*.



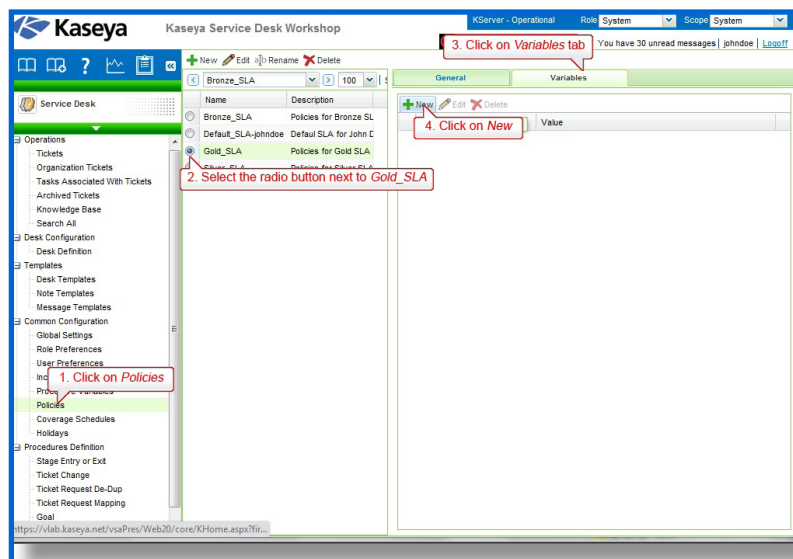
Part 13

You realized that you should not treat handling the issues related to the servers in the *mr* the same way you treat the issues related to the instructional computers in *scis* and *cec* and guest computers in *gl*. In addition to the default policy that you defined before, you decide to define three policies, namely, *Gold_SLA*, *Silver_SLA*, and *Bronze_SLA*, and associate them to machines in *mr*, *scis/cec*, and *gl*, respectively.

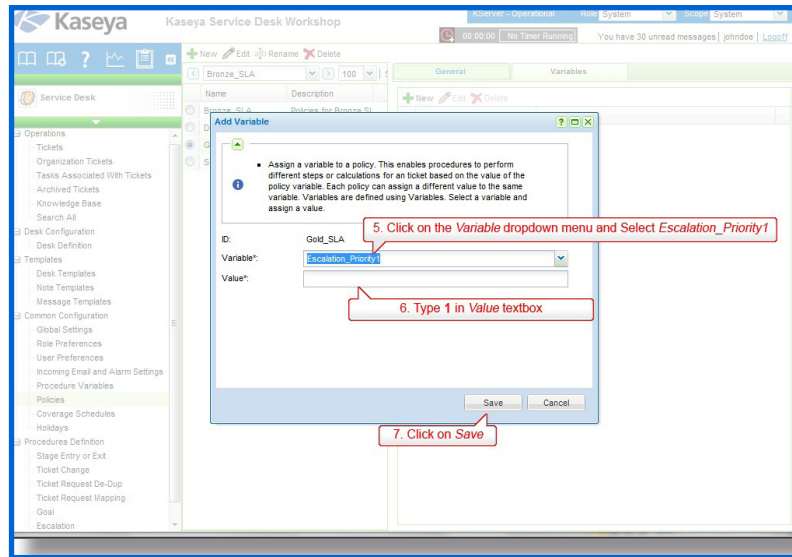
Redefining Values for the Procedure Variables for *Gold_SLA*

Priority	Gold_SLA		
	Escalation (h)	Stage Goal (h)	Ticket Goal (h)
Priority 1	1	3	12
Priority 2	2	5	20
Priority 3	4	9	36
Priority 4	8	17	68

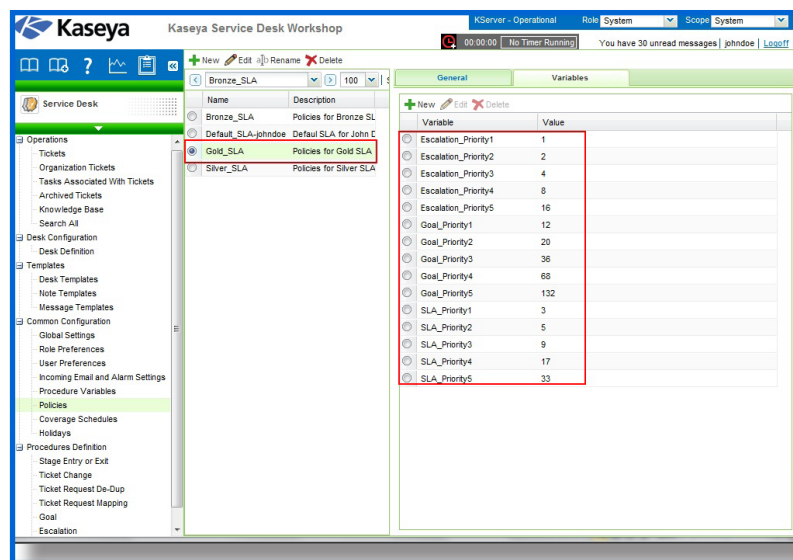
1. Go to *Policies* page.
2. Select the radio button next to Gold_SLA
3. Click on *Variables* tab.
4. Click on *New*.



5. Click on the *Variable* dropdown menu and Select *Escalation_Priority1*.
6. Type **1** in the *Value* textbox.
7. Click on *Save*.

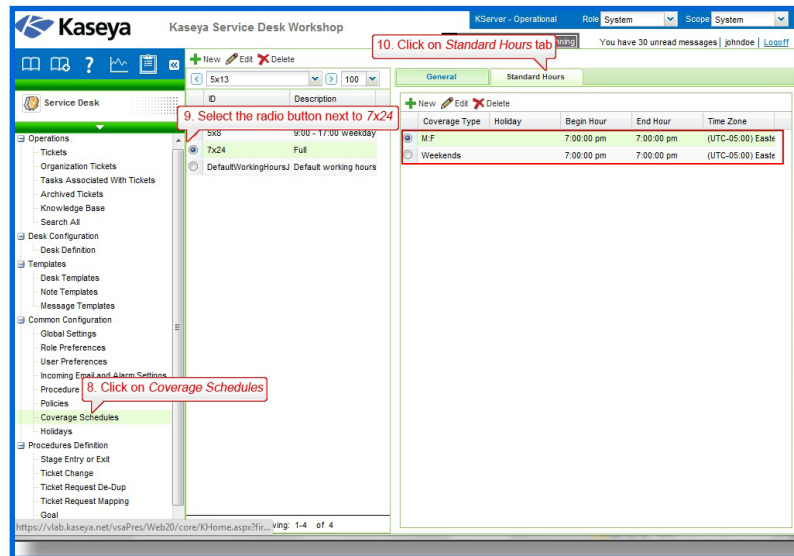


Repeat the above steps for all of the Escalations, Goals, and SLAs.



8. Go to *Coverage Schedule* page.
9. Select the radio button next to *7x24*.
10. Click on *Standard Hours* tab.

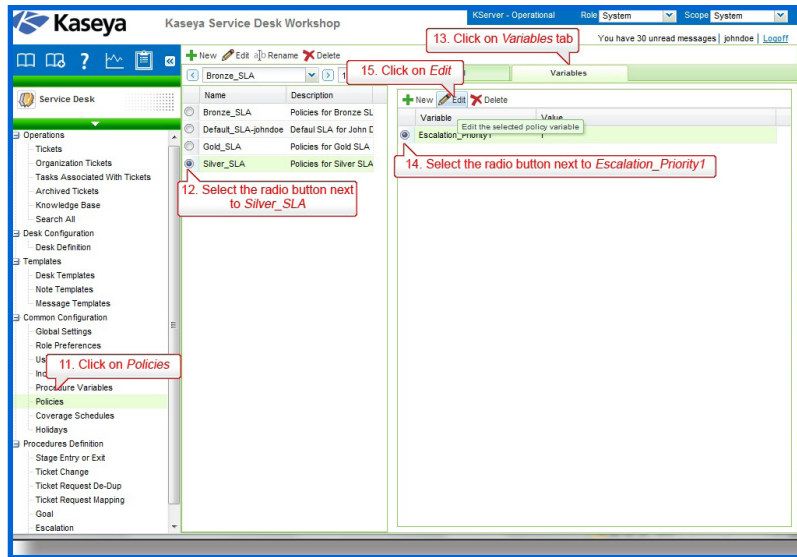
Make sure coverage schedule is set correctly.



Redefining Values for the Procedure Variables for Silver_SLA

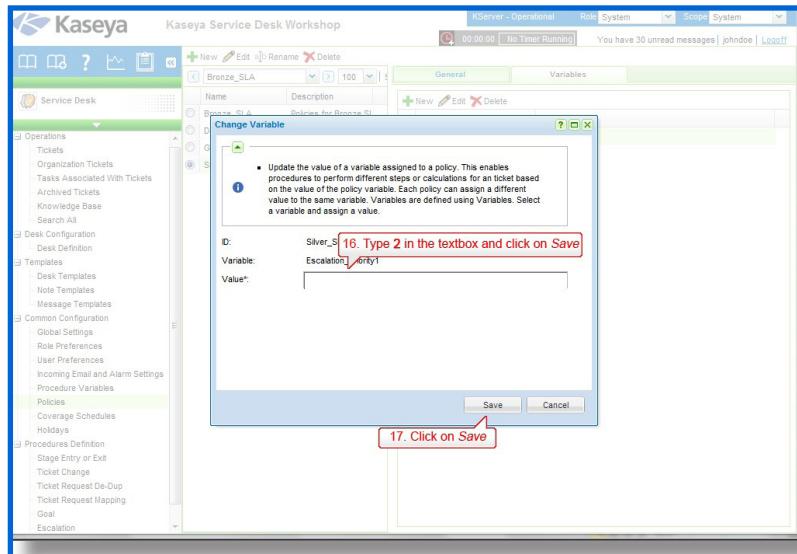
Priority	Silver_SLA		
	Escalation (h)	Stage Goal (h)	Ticket Goal (h)
Priority 1	2	5	20
Priority 2	4	9	36
Priority 3	8	17	68
Priority 4	16	33	132

11. Go to *Policies* page.
12. Select the radio button next to Gold_SLA
13. Click on *Variables* tab.
14. Select the radio button next to *Escalation_Priority1*.
15. Click on *Edit*.



16. Type 2 in *Value* textbox.

17. Click on *Save*.

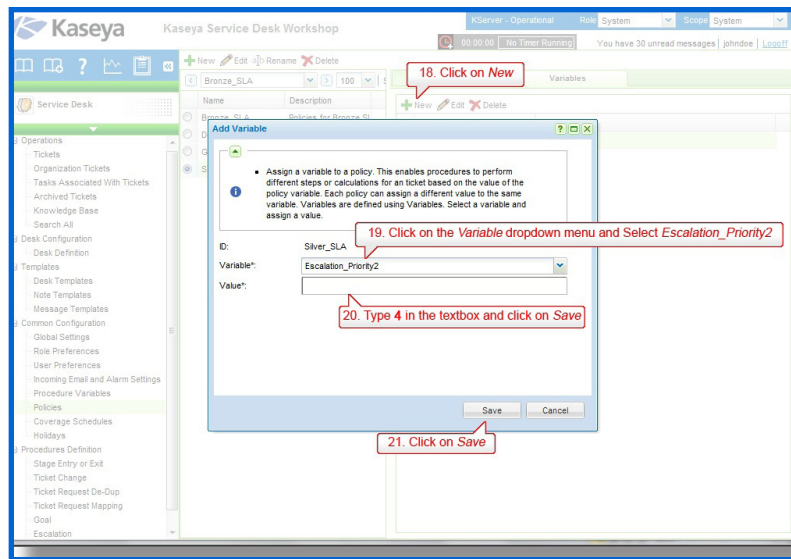


18. Click on *New*.

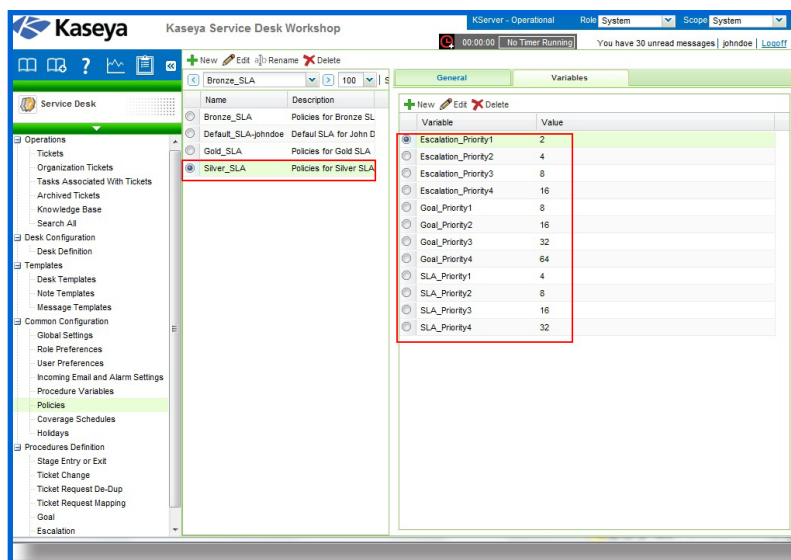
19. Click on the *Variable* dropdown menu and Select *Escalation_Priority2*.

20. Type 4 in the *Value* textbox.

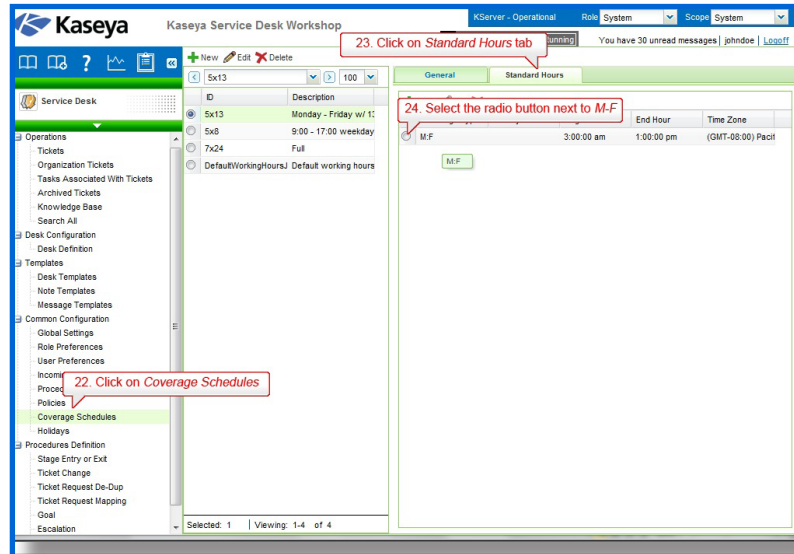
21. Click on *Save*.



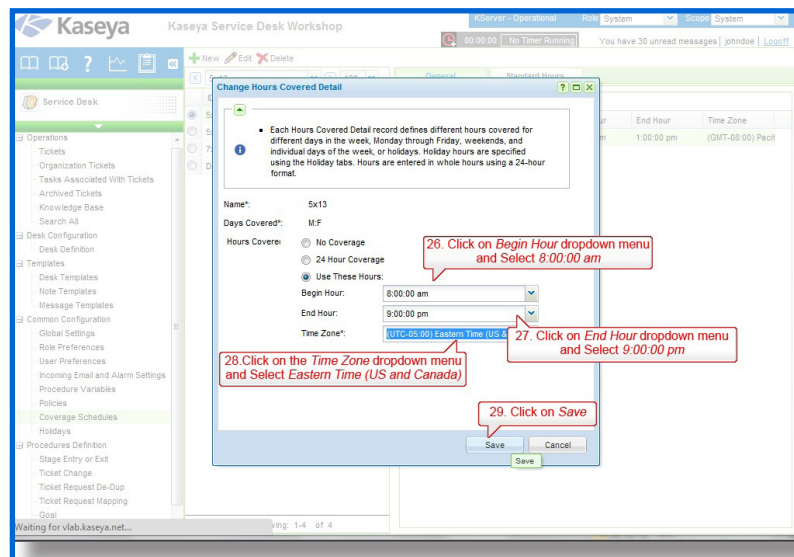
Repeat the above steps for all of the Escalations, Goals, and SLAs



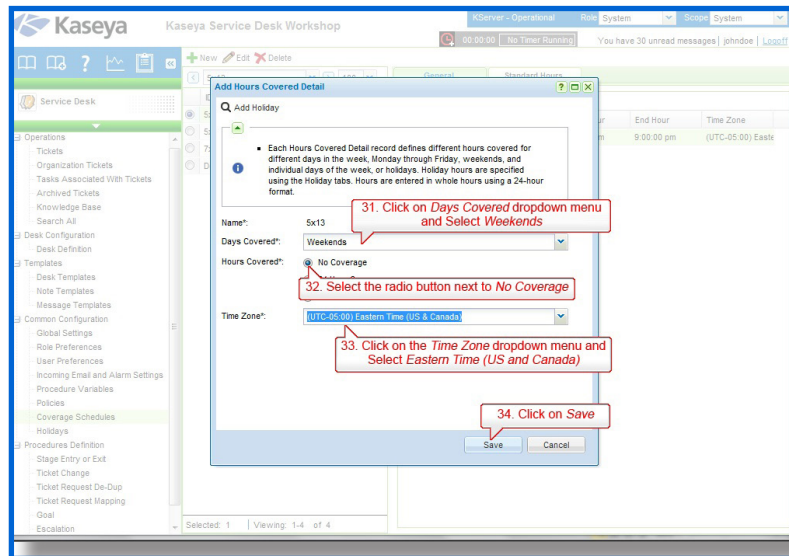
22. Go to *Coverage Schedule* page.
23. Click on *Standard Hours* tab.
24. Click on the radio button next to *M-F*.



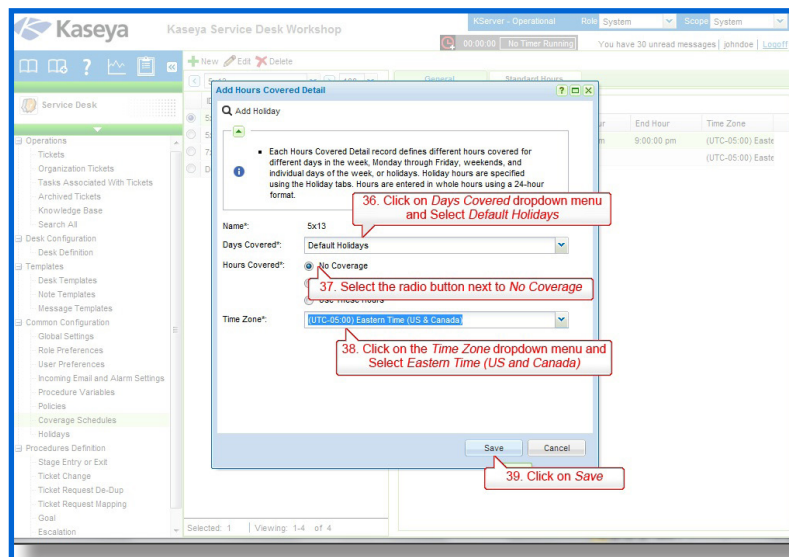
25. Click on *Edit*
26. Click on the *Begin Hour* dropdown menu and select 8:00:00 am.
27. Click on *End Hour* dropdown menu and select 9:00:00 pm.
28. Click on the *Time Zone* dropdown menu and Select <YOURTIMEZONE>.
29. Click on *Save*.



30. Click on *New*.
31. Click on *Days Covered* dropdown menu and select *Weekends*.
32. Select the radio button next to *No Coverage*.
33. Click on the *Time Zone* dropdown menu and Select <YOURTIMEZONE>.
34. Click on *Save*.



35. Click on *New*.
36. Click on *Days Covered* dropdown menu and select *Default Holidays*.
37. Select the radio button next to *No Coverage*.
38. Click on the *Time Zone* dropdown menu and Select *<YOURTIMEZONE>*.
39. Click on *Save*.



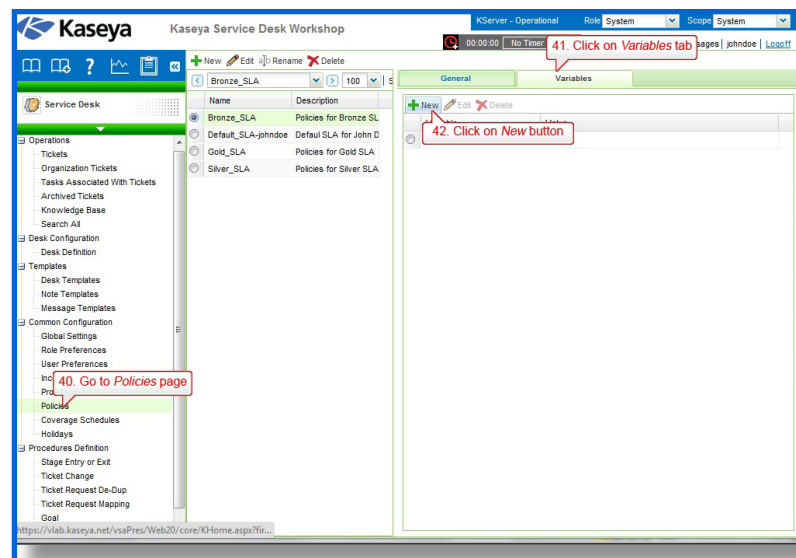
Redefining Values for the Procedure Variables for Bronze_SLA

Priority	Bronze_SLA		
	Escalation (h)	Stage Goal (h)	Ticket Goal (h)
Priority 1	3	7	28
Priority 2	6	13	52
Priority 3	12	25	100
Priority 4	24	49	196

40. Go to *Policies* page.

41. Click on Variables tab.

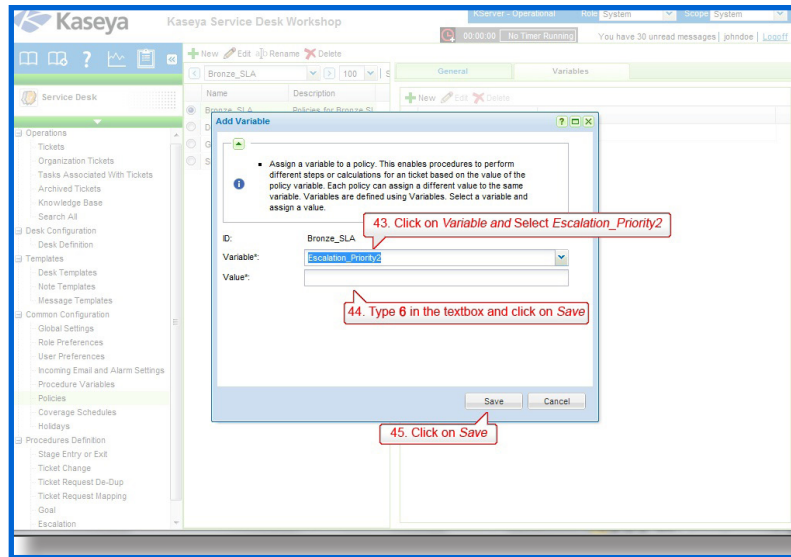
42. Click on *New*



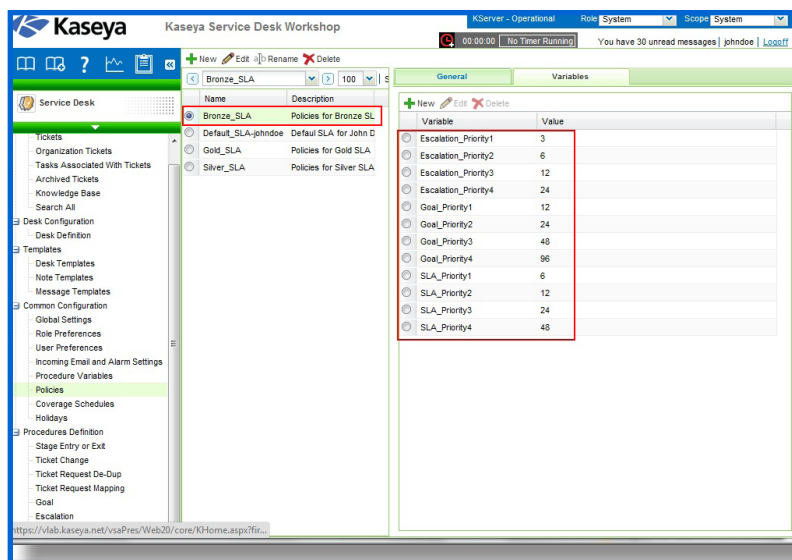
43. Click on the *Variable* dropdown menu and select *Escalation_Priority2*.

44. Type **6** in the *Value* textbox.

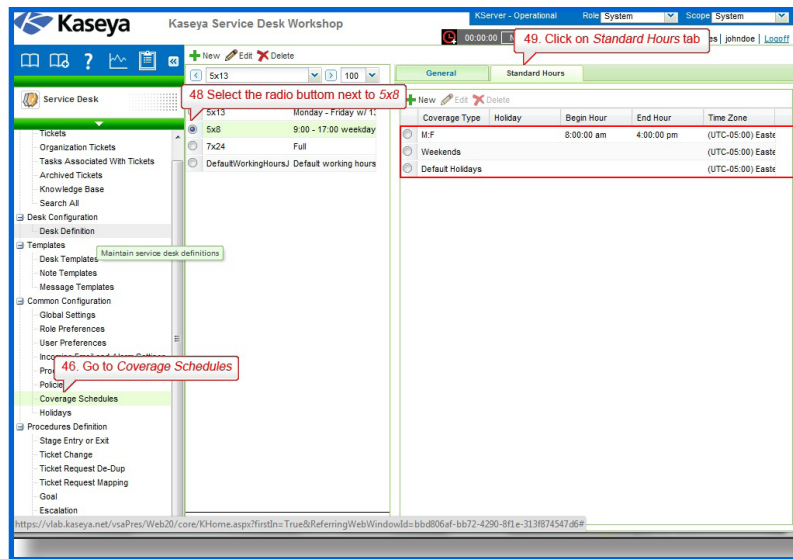
45. Click on *Save*.



Repeat the above steps for all of the Escalations, Goals, and SLAs



46. Go to *Coverage Schedules* page.
47. Select the radio button next to 5x13.
48. Click on *Standard Hours* tab.
49. Make sure M-F, Weekends, and Default Holidays are set correctly.



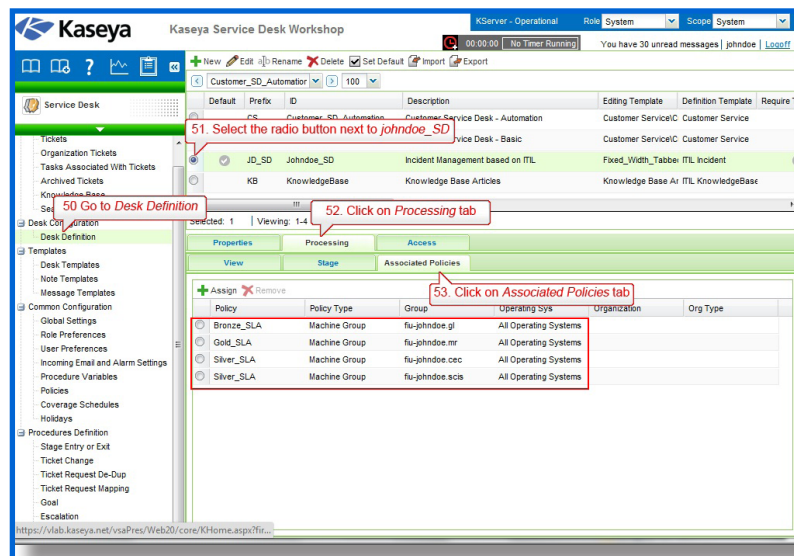
50. Go to *Desk Definition* page.

51. Select the radio button next to <USERNAME>_SD.

52. Click on *Processing* tab.

53. Click on the *Associated Policies* tab.

54. Assign GL machine group to Bronze_SLA, MR to Gold_SLA, CEC and SCIS to Silver_SLA.



We leave this part to you to develop some representative test suites to verify that, Tickets created by the end users of different machines will end up with different policies. Accordingly, the escalation, stage goal, and ticket due times will be overwritten by the corresponding policy.

Part 14

There might be a requirement that you need to prevent any further changes to a ticket unless a set of pre-defined conditions are met.

How do we create a “Forcing Function” within the Service Desk Procedure?

How do we notify the editing user what the prerequisites are?

In the example we are setting up an approval request that can only be approved by One User (Username=Tim Contact).

Steps are:

1. Creating a Request for Approval Status
2. Editing the Change Procedures to check for the Conditionals
 - Check for the Request for Approval status
 - Check whether the right editing user is allowed to make the changes
 - Ensure that the Status is set to reflect the State of the ticket.

Part 15

When a ticket is in Solved Stage and end user replied that the issue still exists, we need to insert a process to reopen that ticket.

Note: Ticket in an end stage cannot be reopened. This is the reason why we add a Solved stage to ensure that the end user no longer is experiencing the issue.

Steps:

1. Check for ticket in solved stage
2. Check that the person editing the ticket is the submitter or end user.
3. If both conditions are TRUE, Then reopen the ticket.
4. Optional : Create a new Status for reopen tickets

Part 16

Items to consider to complete the procedure automation:

1. The Helpdesk Technicians assigns the status of **Waiting For User Feedback** for the status.
2. Suspend Escalation or move the ticket to suspended stage
3. Send email to end user asking for more feedback
4. Send email to the Assignee of the ticket when the end user replies back with more information
5. Change ticket status back to **In Progress**

Items to consider to complete the procedure automation:

6. The Helpdesk Technicians assigns the status of **Waiting For User Feedback** for the status.
 - Add new Status entry if status does not exist
7. Suspend Escalation or move the ticket to suspended stage
 - Add a step in the change procedure to suspend escalation
8. Send email to end user asking for more feedback

- Add a step in the change procedure to the end user
 - Review or add a Message Template for the email content
9. Send email to the Assignee of the ticket when the end user replies back with more information
 - Check when an information is received and send out the email
 10. Change ticket status from **Waiting For User Feedback**
 - Add a step in change procedure after the email notification to the Assignee

Part 17

Create an Agent Procedure to (a) collect information and (b) store it on the Kaseya Server. Create Service Desk Procedure to check of the existence of the Collected Data in the stored location defined in the Agent Procedure. If data exist, then append the information to the Notes of a Ticket.

When a CPU Utilization Alert occurs, Kaseya can automatically create a ticket. When the ticket is created, check for the Monitor Set name in the ticket description. Assign a specific category and execute an Agent Procedure on the machine that created the alert. The agent procedure collects the data and uploads the information to the Kaseya Server in the machine specific folders. Move the ticket to another stage, **CollectData** stage to pull the data and append it to the Ticket note section.

1. Download and Extract the contents of the ServiceDeskLAB.zip
2. Copy the Text2Html.exe file to VSASHAREDFILES\TextToHTMLConverter

Note: Create the TextToHTMLConverter first.

3. Copy the Kpermon.exe file to VSASHAREDFILES

Note: If you imported IT Service Delivery Kit and copied the Kpermon.exe, then you can skip this step.

4. Under Agent Procedures Module, create a new folder under the Shared Cabinet and import the Agent Procedure (AgentProcedureKpermonSD.XML) into the new shared folder.
5. Under Service Desk Procedure Definitions – Sub-Procedures, import the sub procedures to collect data and auto assigned categories. (Procedure Folder SDW.xml)
6. Edit the Auto Assign Category for Collecting Data procedure
 - Edit the Schedule procedure command to point to the correct Agent Procedure that you just imported.
7. Ensure that the correct references for Agent procedures and Sub procedures are performed
8. Edit the Identified Entry procedure to add a command step to execute the Sub-Procedure Auto Assign Category For Collecting Data

Edit the Escalation Procedure

9. Add a new stage CollectData set the escalation time for 2 minutes
10. Set the Stage Procedure
11. Leave the Entry Stage Procedure Blank

Review the Incoming Email and Alarm Settings

12. Alarm Mapping Procedure
13. Alarm Default Service Desk

Test Automation

14. Create a monitor set labeled “CPU Utilization” to test for CPU Performance
15. Monitor Processor Object, % Processor Counter, Total Instance.
16. Use Set threshold value very low to set off the alarm (i.e. 10%)
17. Assign the new Monitor set to an endpoint
18. Set the notification to Create Ticket
19. Review the Note Field and Escalation Time to check the progress

Note: Note there are delays in creating tickets from alarms. Data collected will list the process list into the Note fields.