Ticketing

Table of Contents:

- ◊ Manage Tickets
- ◊ Configure Ticketing

Introduction

While deployed agents provide extremely useful information regarding the state of all managed machine, facilitating regular automated system maintenance tasks, any IT Support must still perform sporadic maintenance tasks, based on random user requests and daily sever problems reported by agents. In addition, all such tasks must be performed in a manner that minimizes overall disruptions in the work environment. However, the large number of managed machines and users, and different levels of severity associated with reported problems renders ad-hoc respond approaches as inefficient and unsustainable. Without an automated system to organize and prioritize user support requests, the user support tasks become tedious and unmanageable. In addition, relying on email or even phone calls as the communication medium between the user and maintenance technicians creates an unorganized environment where the number of service requests greatly exceeds the technicians' capacity to handle the requests. A well-organized IT support environment not only requires an automated ticketing system to keep requests organized and prioritized, and to document the progress towards the completion of each request, it also requires full integration of such ticketing system with the underlying IT management platform. This is needed to streamline end user requests, and manage SLA's and server uptimes more efficiently.

Kaseya integrated help desk and ticketing system to support the IT support personnel with the tools they need to track and resolve issues quickly. The **Ticketing** module manages and documents service requests using **tickets**. A ticket is created when an issue is reported by the user is updated to reflect the progress in resolving the issue. The ticketing system automatically notifies designated VSA users and ticket submitters by email for such system events as ticket creation, changes, or resolutions. The system organizes tickets by machine ID, group ID, organization ID, department ID, or staff ID. In addition, it is recommended to create a "generic" organization in System > Manage to hold tickets of a global nature, such as general network problems.

This section will cover the following function provided by the ticketing system.

Functions	Description
View Summary	Lists all tickets. Each row displays summary data for a single ticket.
Create/View	Create new tickets, or add or modify notes in existing tickets.
Delete/Archive	Permanently delete tickets or move tickets into archival storage.
Migrate Tickets	Migrate Ticketing tickets to and from Service Desk tickets.
Notify Policy	Determine when email notifications are sent out by the Ticketing module.
Access Policy	Determine who can edit and/or display fields in tickets.
Assignee Policy	Create policies to automatically assign users to a new or existing ticket.
Due Date Policy	Define default due dates for new tickets based on field values and email subject lines.

Edit Fields	Define, modify, or create ticket fields used to classify tickets.
Email Reader	Setup automatic polling of a POP3 email server to generate new ticket entries.
Email Mapping	Define default field values for new tickets received using the Email Reader.

8.1 Manage Tickets

8.1.1 View Summary

The **View Summary** page lists all tickets. Each row displays summary data for a single ticket. New tickets, or new notes in existing tickets, are clearly highlighted in one of two ways.

- **By Date** - Tickets with new notes entered in the last 1 day are highlighted in red. New notes entered in the last 7 days are highlighted in yellow. You can adjust these times and colors by clicking the Change Highlight link.
- **Read Flag** - Each ticket is flagged to indicate if the user has viewed all the notes in the ticket. Once viewed, the ticket is marked as read using the icon. If another user or user adds or modifies a note, the flag is switched back to unread for you, showing the icon.

Filtering

The list of tickets displayed depends on several factors:

- The list displayed depends on the machine ID / group ID filter and machine groups the user is authorized to view.
- You can further sort and filter listed tickets by selecting values in the field drop-down lists.
- Search does not display any tickets if notes contain none of the words being searched for.

Machine users only have access to tickets for their own machine ID using Portal Access.

Assignees

The assignee list displayed in View Summary and Create/View is based on the scope of the currently logged on user. Ticketing assignment in the **Ticketing** module always allows you to see master users, regardless of your role or scope.

Fig. 8.1 below shows the generic view of the View Summary page. The functions supported on this page are listed and explained on the next page.

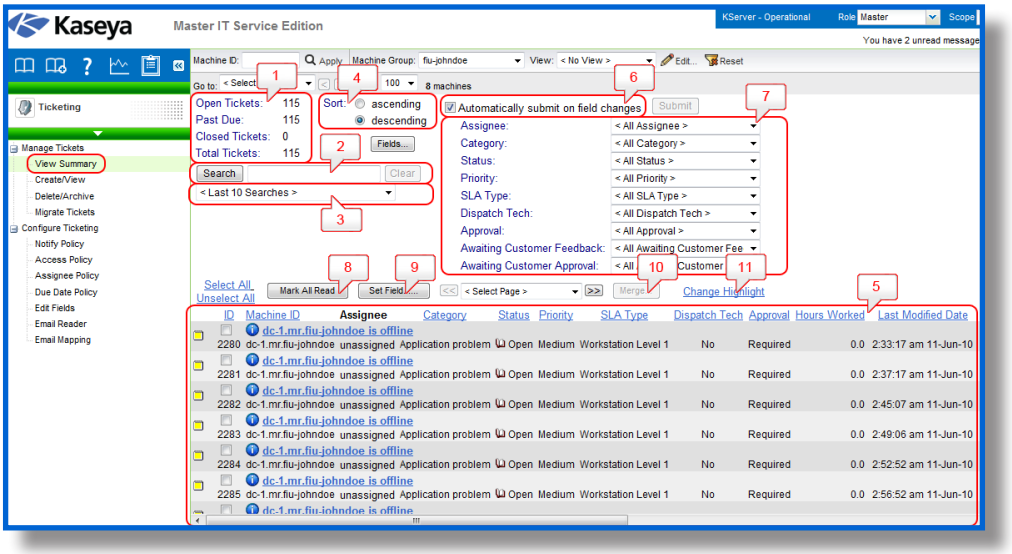


Fig. 8.1: *View Summary*

1. **Open Tickets, Past Due, Closed Tickets, Total Tickets:** Shows the number of tickets open, past due, closed, and total for all tickets matching the filtering criteria described above.

2. **Search: Search** restricts the list of tickets to only tickets containing **any** of the words or phrases in the search string. Enclose a phrase in double-quotes (“). Search examines the ticket **Summary** line, submitter **Name**, submitter **Email**, submitter **Phone**, or any of the **Notes**. Include an asterisk (*) wildcard with the text you enter to match multiple records. Clicking any of the ticket **Summary** links in the paging area displays the details of that ticket using the View Ticket page. Words in the ticket notes matching any **Search** word are *highlighted with a green background.*

3. **<last 10 searches>:** The drop-down list below the *Search* box lists the <last 10 searches> you have made. Selecting any item from the list automatically re-searches for those words.

4. **Sort:** Click either ascending or *descending* to sort tickets by the selected column.

5. **Fields:** Allows each user to organize the columns displayed in the table. Clicking *Fields* opens a dialog in a new browser window. There, you can select which columns to show or hide and also the order in which columns are displayed. You can show/hide any of the following columns:

- **ID** - Unique ID number automatically assigned to each ticket.
- **Machine ID** - The ticket applied to this machine.
- **Assignee** - Name of the user responsible for solving this problem.
- **Category** - Type of problem this ticket discusses.
- **Status** - Open, Hold, Closed
- **Priority** - High, Normal, Low
- **SLA Type** - Service Level Agreement type
- **Dispatch Tech** - Yes, No
- **Approval** - Required, Not Required
- **Hours Worked** - Hours worked, in decimal format.
- **Last Modified Date** - Last time any note was added to this ticket.
- **Creation Date** - Time when the ticket was first entered.

- **Due Date** - Ticket due date.
- **Resolution Date** - Date the ticket was closed.
- **Submitter Name** - Person who submitted this ticket: user, user name, or machine ID.
- **Submitter Email** - The submitter email address.
- **Submitter Phone** - The submitter phone number.

Note: *The last 6 items above are not shown in the figure.*

You can also select additional custom fields you have previously created using **Ticketing > Edit Fields.**

6. **Automatically submit on field changes / Submit:** If *Automatically submit on field changes* is checked, then the *View Summary* page redisplays as soon as a single field in the *List Fields Filter* is changed. If blank, then you can change several of the *List Fields Filter* at one time. The View Summary page won't redisplay until you click *Submit*.

7. **List Fields Filter:** Each field of type List such as **Category**, **Status**, or **Priority** are shown as selectable drop-down lists. Selecting values from one or more of these drop-down lists filters the paging area to display only those tickets matching the selected values. Custom List fields are created using **Ticketing > Edit Fields.**

8. **Mark All Read:** Click to mark all tickets as read. Read tickets display a icon. Any changes or note additions inserted by other users reset the ticket to unread. Unread tickets display a icon.

9. **Set Field:** Use *Set Field* to change multiple field values on multiple tickets at once. Check the box for all the tickets you wish to change a field value for. Then click *Set Field* a dialog box displays that enables you to set a new value for any of the fields.

10. **Merge:** To merge tickets, check the box for any two tickets listed, then click the *Merge* button. The resulting merged ticket contains all the notes and attachments from both tickets. You are asked which field values you wish to use in the ticket for all field values that are different between the two tickets.

11. **Change Highlight:** Click Change Highlight to set and/or modify row highlighting based on date. Highlight tickets in two ways. Tickets with a date within 1 day of the current time are highlighted in red. Tickets with a date within 7 days are highlighted in yellow. You can independently adjust both the number of days and the highlight color. To disable highlighting by date, set each number of days to zero. The highlight date may be last modified date, due date, or creation date.

Data Table

Each row of the table lists summary data for a single ticket.

- To display the details of the ticket in a *new window* click the new window icon. Hovering the mouse cursor over the icon of a ticket displays a preview window of the latest notes for that ticket. Use this to quickly review tickets in your queue.
- To display the details of the ticket in the *same window* click the summary line link.
- To toggle the state to *read* click .
- To toggle the state to *unread* click .

8.1.2 Create / View

The **Create/View** page (Fig. 8.2) creates new tickets, or adds or modify notes in existing tickets.

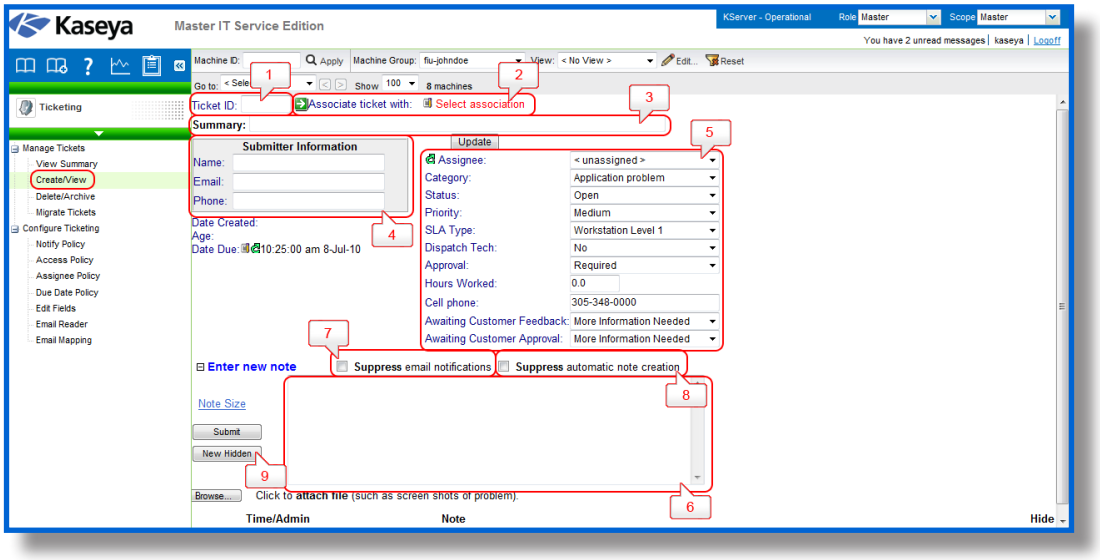


Fig 8.2: *Create/View*

1. **Ticket ID:** Enter ticket ID to view. Create a new ticket by entering a summary, new note, and assigning the ticket to a machine ID or group.

2. **Associate ticket with:** All tickets must be assigned to either a department ID, group ID, machine ID, organization ID or staff ID.

3. **Summary:** Enter a short description of the problem. All tickets require a summary.

4. **Submitter Information:** The Submitter fields are populated depending on the machine ID that was selected in option 2 above, the submitter User Name, User Email and User Phone fields are populated with contact data maintained for this machine ID using **Agent >** Edit Profile. This information can be updated if need be. If anything other than machine ID was selected in option 2, these submitter fields can be filled in manually, if applicable. If a ticket was created by an incoming email using **Ticketing >** Email Reader, the Submitter Email field is populated with the sender›s email address.

5. **Classify tickets:** Classify the ticket using the built-in List type fields, such as **Assignee**, **Category**, **Status**, and **Priority**. You can also classify the ticket using additional List type fields that have been created for tickets using **Ticketing > Edit Fields**.

6. **Notes:** Enter details of the problem in the *Notes* edit box. Click the *Note Size* link to change the number of rows available for your note text.

7. **Supress Email Notification:** Check the *Suppress email notification* checkbox if you don›t want email recipients, either VSA users or machine users, to be notified about the ticket. In most cases you›ll want to leave this blank.

8. **Supress automatic note creation:** Check the *Suppress automatic note creation* checkbox if you don't want a note to be added automatically. This option is hidden by default.

9. **New Hidden:** Click *New Hidden* to complete the creation of the ticket to notify only VSA users by email. Use hidden notes to record data or analysis that may be too detailed or confusing to machine users but useful to other VSA users.

8.1.3 Delete Archive

The **Delete/Archive** page deletes old tickets, or deletes tickets in a particular category or status. You may reach the point where your system has so many old tickets that they are cluttering up searches with obsolete data.

Archiving Tickets

In addition to delete, you can also **archive** tickets. Archived tickets stay in the database but are moved to separate tables. Use archive to move obsolete or old tickets out of the active database **without** deleting them from the system. You can always move tickets back and forth between the active database table and the archive database table.

Filtering

The list of tickets displayed depends on several factors:

- The list displayed depends on the machine ID / group ID filter and machine groups the user is authorized to view.
- You can further sort and filter listed tickets by selecting values in the field drop-down lists.
- Search does not display any tickets if notes contain none of the words being searched for.
- Machine users only have access to tickets for their own machine ID using Portal Access.
- Use the Hide tickets last modified after control to only display tickets earlier than a certain date.

Fig. 8.3 below shows the generic view of the Delete/Archive page. The options supported on this page are listed and explained below.

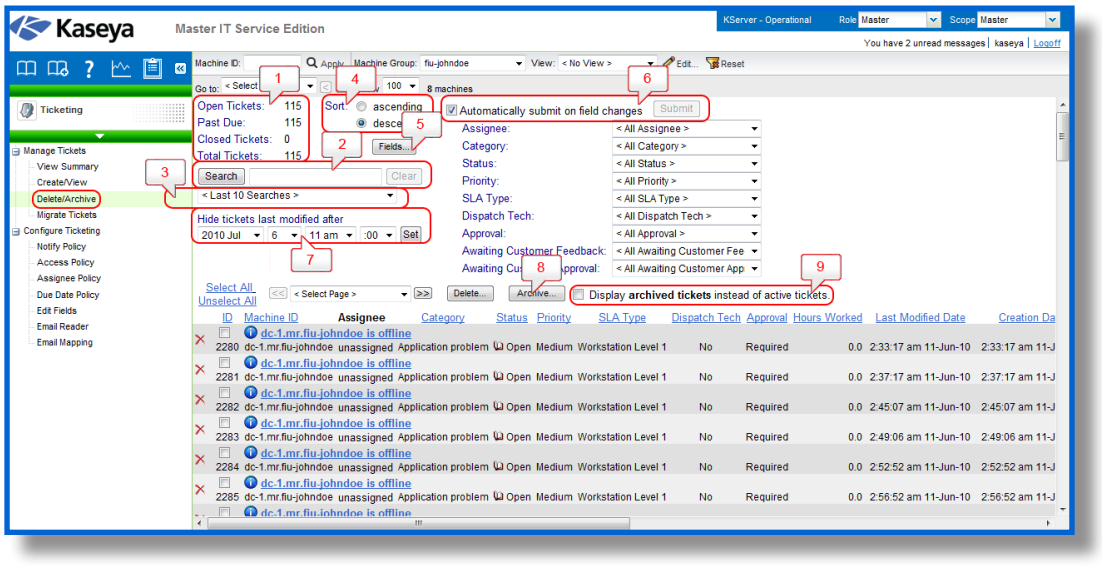


Fig. 8.3: *Delete/Archive*

1. Open Tickets, Past Due, Closed Tickets, Total Tickets: Shows the number of tickets open, past due, closed, and total for all tickets matching the filtering criteria described above.

2. Search: Search restricts the list of tickets to only tickets containing any of the words or phrases in the search string. Enclose a phrase in double-quotes («). Search examines the ticket Summary line, submitter Name, submitter Email, submitter Phone, or any of the Notes. Include an asterisk (*) wildcard with the text you enter to match multiple records. Clicking any of the ticket Summary links in the paging area displays the details of that ticket using the View Ticket page. Words in the ticket notes matching

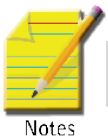
any Search word are highlighted with a green background.

3. <last 10 searches>: The drop-down list below the *Search* edit box lists the <last 10 searches> you have made. Selecting any item from the list automatically re-searches for those words.

4. Sort: Click either *ascending* or *descending* to order tickets by the selected column.

5. Fields: Allows each user to organize the columns displayed in the table. Clicking *Fields* opens a dialog in a new browser window. There, you can select which columns to show or hide and also the order in which columns are displayed. You can show/hide any of the following columns:

- **ID** - Unique ID number automatically assigned to each ticket.
- **Machine ID** - The ticket applied to this machine.
- **Assignee** - Name of the user responsible for solving this problem.
- **Category** - Type of problem this ticket discusses.
- **Status** - Open, Hold, Closed
- **Priority** - High, Normal, Low
- **SLA Type** - Service Level Agreement type
- **Dispatch Tech** - Yes, No
- **Approval** - Required, Not Required
- **Hours Worked** - Hours worked, in decimal format.
- **Last Modified Date** - Last time any note was added to this ticket.
- **Creation Date** - Time when the ticket was first entered.
- **Due Date** - Ticket due date.
- **Resolution Date** - Date the ticket was closed.
- **Submitter Name** - Person who submitted this ticket: user, user name, or machine ID.
- **Submitter Email** - The submitter email address.
- **Submitter Phone** - The submitter phone number.



Note: *The last 5 items above are not shown in the figure.*

6. Automatically submit on field changes / Submit: If *Automatically submit on field changes* is checked, then the View Summary page redisplays as soon as a single field in the List Fields Filter is changed. If blank, then you can change several of the List Fields Filter at one time. The View Summary page won›t redisplay until you click *Submit*.

7. Hide tickets last modified after / Set: Set the date and time of this control to only display tickets earlier than a certain date.

8. Archive: Select one or more tickets and click the *Archive* button. Archived tickets stay in the database but are moved to separate tables. Use archive to move obsolete or old tickets out of the active database *without* deleting them from the system. You can always move tickets back and forth between the active database table and the archive database table.

9. Display archived tickets instead of active tickets / Restore: Check the *Display archived tickets instead of active tickets* checkbox to search and examine the archived tickets. You can move tickets

back to the active table here using the *Restore* button.

8.1.4 Migrate Tickets

As labeled in Fig. 8.4, the **Migrate Tickets** page performs two tasks:

1. Migrates selected tickets into the Service Desk.
2. Imports Service Desk ticket (XML format) into the Ticketing.

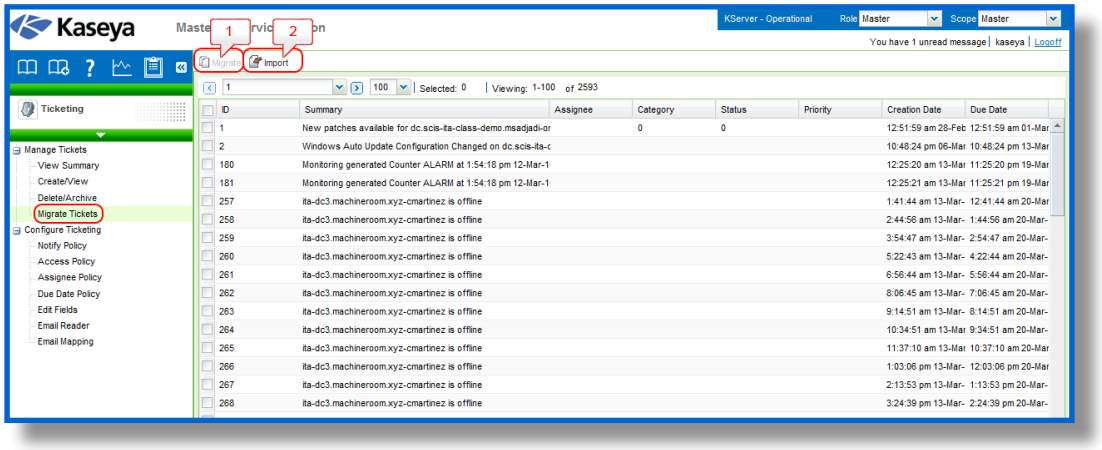


Fig. 8.4: *Migrate Tickets*

Migrating Tickets from Ticketing into Service Desk

The paging area of Migrate Tickets displays all the tickets visible to you in the **Ticketing > View Summary** page.

1. Select the tickets you want to migrate in the paging area. Click *Select All* to select all tickets.
2. Click *Migrate* to migrate all the selected tickets into Service Desk.

Importing Service Desk Tickets into Ticketing

1. Export selected tickets in Service Desk to an XML file on your local machine or network, using the *Export* button in **Service Desk >** Tickets**.**
2. Click *Import* in **Ticketing >** Migrate Tickets and select the XML file you created in step 1 above.

8.2 Configure Ticketing

8.2.1 Notify Policy

The **Notify Policy** page determines when email notifications are sent out by the Ticketing module. Multiple policies can be defined for each machine group, by clicking the Add button instead of the Update button. This lets you specify different email lists for different ticketing events. For example, you may wish to send email alerts to a group of users for ticket creations and note additions, but send email to a different list of users for overdue tickets.

To be sent email notification for a ticketing event:

- Check the box to the left of each ticketing event you need to be notified about.
- Enter a comma separated list of email address in the Email List edit box.
- Check the box to the left of all group IDs you wish to apply this notification policy to.
- Click the *Update* or *Add* button.

From Address

The *From* address used by ticket notifications is based on the Email Reader address, if one is defined. If an **Email Reader** has not yet been defined then the *From* address in **System > Outbound Email** is used.

Fig. 8.5 below shows the generic view of the Notify Policy page. The functions supported on this page are listed and explained below.

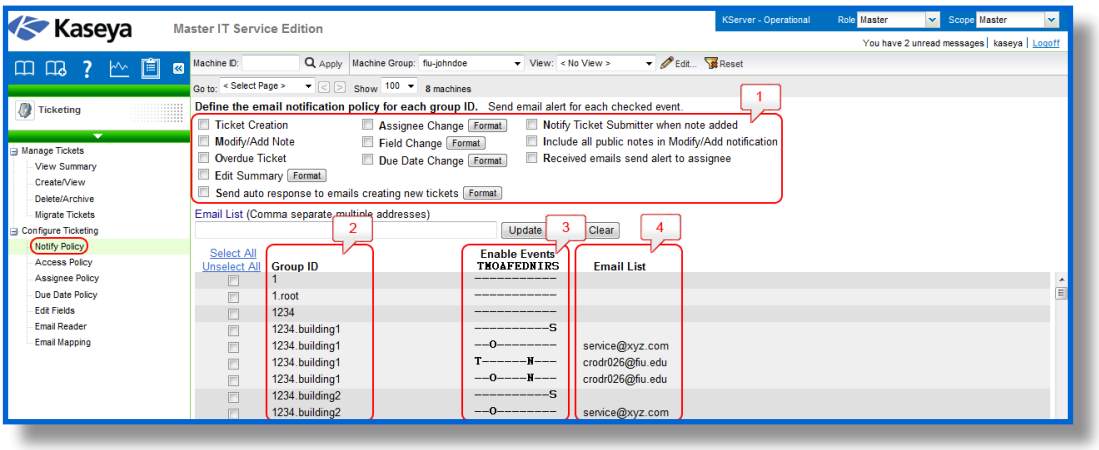


Fig. 8.5: *Notify Policy*

1. Notification Type Checkboxes: The list of check boxes below describes when the ticketing system sends an email notification to all email recipients in the email list.

- **Ticket Creation** - If checked, an email is sent at the time of ticket creation.
- **Modify/Add Note** - If checked, an email is sent when any note is added or changed to a ticket.
- **Overdue Ticket** - If checked, an email is sent when a ticket passes its due date without being closed.
- **Edit Summary** - If checked, an email is sent when anyone changes the summary line for a ticket. Click **Format** to edit the format for this email notification.
- **Send auto response to emails creating new tickets** - If checked, an automated reply message is sent out to the person that sent in an email that generated a new ticket. Automated response emails give your users an acknowledgement that their request has been received and processed by the system. Creating tickets based on inbound emails are configured using Email Reader and Email Mapping. Click *Format* to edit the format for this email notification.
- **Assignee Change** - If checked, an email is sent when a ticket is assigned to a different user. Click *Format* to edit the format for this email notification.
- **Field Change** - If checked, an email is sent when anyone changes any custom field in a ticket. Click **Format** to edit the format for this email notification.
- **Due Date Change** - If checked, an email is sent when anyone changes the due date of a ticket. Click **Format** to edit the format for this email notification.

- **Notify Ticket Submitter when note added** - If checked, an email is sent to the email address entered for the ticket submitter, in addition to the email list for all email notification messages.
- **Include all public notes in Modify/Add notification** - If checked, *all* notes for a ticket are included when a Modify/Add Note message is sent out.
- **Received email alerts always sent to assignee** - If checked, an email is sent to the ticket assignee, whenever a new note is created for a ticket, even if the assignee is *not* on the notification email list for this group ID.

2. **Machine Group:** Lists machine groups. All machine IDs are associated with a group ID and optionally a subgroup ID.

3. **Enable Events TMOAFEDNIRS:** Identifies the ticketing events that trigger email notification of email recipients listed in the Email List column.

4. **Email List:** The list of email recipients notified by selected ticketing events for this group ID.

8.2.2 Access Policy

The **Access Policy** page determines who can edit and/or display fields in tickets. Independent policies can be set for each user role and for all machine users. Machine users only see tickets assigned to their machine ID. Non-master role users only see tickets for scopes they are authorized to access.

Fig. 8.6 below shows the generic view of the Access Policy page. The functions supported on this page are listed and explained below.

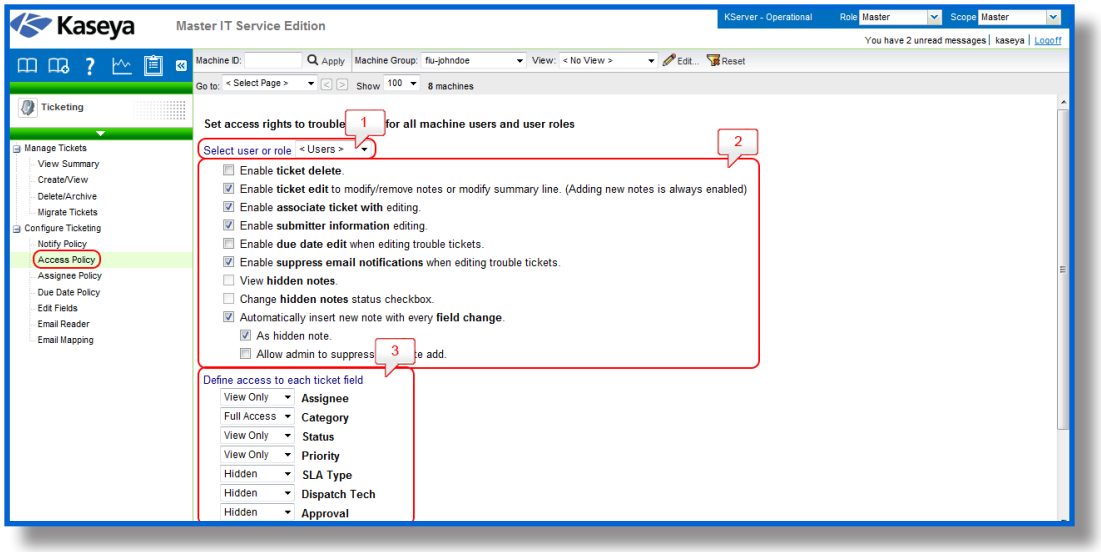


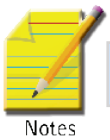
Fig. 8.6: *Access Policy*

1. **Users:** Select user or user group: Before setting any other policy options, select <Users>, meaning all machine users, or a user role from the drop-down list.

2. **Access Rights:** The following access rights apply to all machine users or to a selected user role, as specified using Select user or user group.

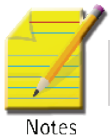
- **Enable ticket delete** - If checked, the selected user role can delete entire tickets using the Delete/Archive page.
- **Enable ticket edit to modify or remove notes or modify summary line (Adding new notes is al-**

ways enabled) - If checked, the selected user role can edit existing notes or modify the summary line.



Note: *Adding new notes is always enabled for all user groups*

- **Enable associate ticket with editing** - If checked, enables the selected user role to edit the machine ID or group associated with a ticket.
- **Enable submitter information editing** - If checked, enables submitter information to be edited.
- **Enable due date edit when editing trouble tickets** - If checked, the selected user role can modify the ticket due date.
- **Enable suppress email notifications when editing trouble tickets** - If checked, the selected user role can suppress email notifications when modifying an existing ticket.
- **View hidden notes** - If checked, the selected user role can view hidden notes.



Note: *Hidden notes can never be viewed by users*

- **Change hidden notes status checkbox** - If checked for the selected user role, notes display a *Hide* checkbox at the far right edge of each ticket note. Toggling the *Hide* checkbox makes a note hidden or not hidden.
- **Automatically insert new note with every field change** - If checked for the selected user role, notes are automatically inserted whenever any ticket field changes.
    - **As hidden note** - If checked for the selected user role, automatic notes are added as hidden notes. This policy only applies if *Automatically insert new note with every field change* is checked.
    - **Allow admin to suppress auto note add** - Suppresses the adding of an automatic note when ticket properties are changed and no manual note is added.

3. **Define access to each ticket field** - Defines access to each field for the selected user role. Fields are created using *Edit Fields*. Three levels of access are possible:

- **Full Access** - Can view and modify this field in every ticket.
- **View Only** - Can see but not change the value of this field.
- **Hidden** - Hidden fields are not shown.

8.2.3 Assignee Policy

The **Assignee Policy** page automatically assigns a VSA user to a new or existing ticket. Assignment is based on the combination of List type field values entered for a ticket. List type fields and their possible values are defined using **Ticketing > Edit Fields**. The policy is enforced every time the ticket is saved.

Overriding Assignee Policy
Assignee Policy can be overridden for a specific ticket using the Create/View page, by the toggling the icon next to the *Assignee* field to display a icon, then assigning a user manually.

Order of Precedence
The order of precedence for policy *selection* is based on the alphabetical sort order of the policy *name*, which also determines how the policies are listed in the paging area. For example, a policy named of AAA will always be selected before BBB, so long as all of the fields in AAA match the settings of the ticket. You can *force* policy selection to use the sort order you prefer by naming the policies accordingly. For example, you can add a numerical prefix to each policy name, such as 01, 02, 03 and adjust the sort order in this fashion. To rename existing policies, select the edit icon next to a policy name, then enter a new name and click *Apply*.

Fig. 8.7 below shows the generic view of the Assignee Policy page. The functions supported on this page are listed and explained below.

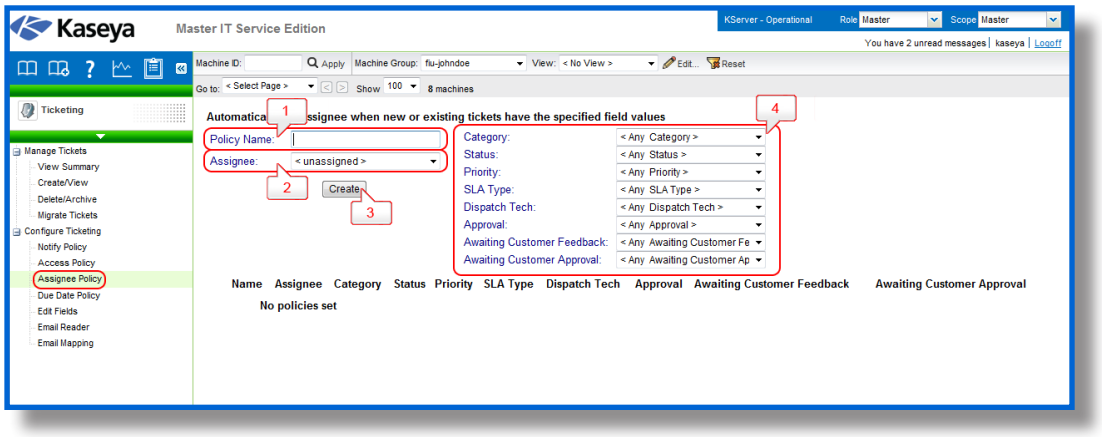


Fig. 8.7:
Assignee Policy

1. **Policy Name:** Enter the name for the assignee policy.

2. **Assignee:** Select the user who will be assigned tickets that match the selected combination of list type field values.

3. **Create:** Click *Create* to create the assignee policy.

4. **List Fields:** Each field of type list such as **Category**, **Status**, or **Priority** are shown as selectable drop-down lists. Select values for one or more of the fields. The combination of list type field values associated with an assignee determines which assignee is automatically assigned to a new or existing ticket.

8.2.4 Due date Policy

The **Due Date Policy** page sets the due date for each new ticket based on field values. Any combination of List type fields may be defined to set a due date. This allows you to set a new ticket due date based on the urgency of the ticket and a guaranteed level of service. For example, define a new List type field named Service Level with the following values: Premium, Standard, and Economy. Create different due date policies for each combination such as:

- Set resolution time to 1 Hrs when Priority = High and Service Level = Premium
- Set resolution time to 7 Days when Priority = Normal and Service Level = Economy

When a new ticket gets created, the due date is set by adding the number of hours in the policy to the current time.

Overdue Tickets
When a ticket is overdue, the due date displays in bolded dark red text, both in the View Summary page and in ticketing reports. It also displays in red text in the header of the Create/View page. You can optionally send an email for overdue tickets using **Ticketing > Notify Policy**. A ticket is resolved when its status is set to closed and the resolution date is recorded.

Order of Precedence
The order of precedence for policy *selection* is based on the alphabetical sort order of the policy *name*, which also determines how the policies are listed in the paging area. For example, a policy named of AAA will always be selected before BBB, so long as all of the fields in AAA match the settings of the ticket. You can *force* policy selection to use the sort order you prefer by naming the policies accordingly. For example, you can add a numerical prefix to each policy name, such as 01, 02, 03, and adjust the sort order in this fashion. To rename existing policies, select the edit icon next to a policy name, then enter a new name and click *Apply*.

Fig 7.8 below shows the generic view of the Due Date Policy page. The functions supported on this page are listed and explained below.

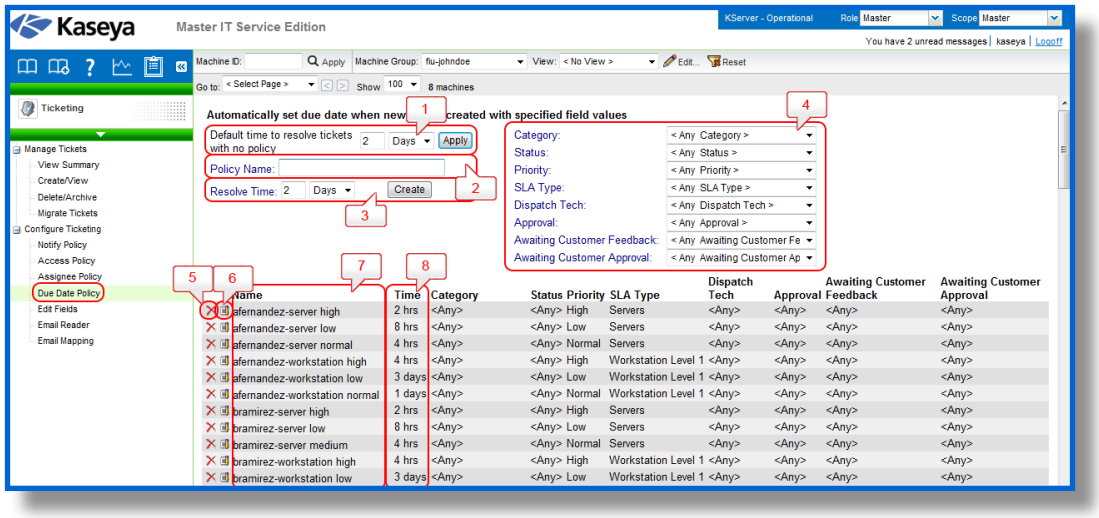


Fig. 8.8: *Due Date Policy page*

1. **Default time to resolve tickets with no policy:** Enter the number of hours or days to resolve tickets when new tickets are created that do not match any policy.

2. **Policy Name:** Enter a name for a new or selected due date policy.

3. **Resolve Time:** When new tickets are created that match the field values in this policy, then the due date is set to this number of hours or days plus the current time.

4. **Fields:** Select values for one or more List type fields that a new ticket must match to automatically set the due date for the new ticket.

5. **Delete Icon:** Click the delete icon to delete a row in the paging area.

6. **Edit Icon:** Click a row's edit icon to populate header parameters with values from that row. You can edit these values in the header and re-apply them. The selected row is highlighted in yellow.

7. **Name:** The name of the due date policy.

8. **Time:** The time added to the current date and time to set the due date policy for a new ticket.

8.2.5 Edit Fields

The **Edit Fields** page creates fields used to classify tickets and sets the default values for those fields. Fields are associated with the entire ticket, as opposed to each note of the ticket. You can *customize* the field label and corresponding values of each field, including the mandatory fields. The fields you define here display in the following pages: View Summary, View Ticket, Delete/Archive, Access Policy, Due Date Policy and Email Mapping.

Mandatory Fields
Three mandatory List type fields exist that may not be removed from the system. The values for these list fields can be customized. The mandatory fields are:

- **Category** - Classifies tickets by IT category.
- **Status** - State of the current ticket: Open, Hold, Closed
- **Priority** - High, Normal, Low

Fig. 8.9 shows the generic view of the Edit Fields page. The functions supported on this page are listed and explained below.

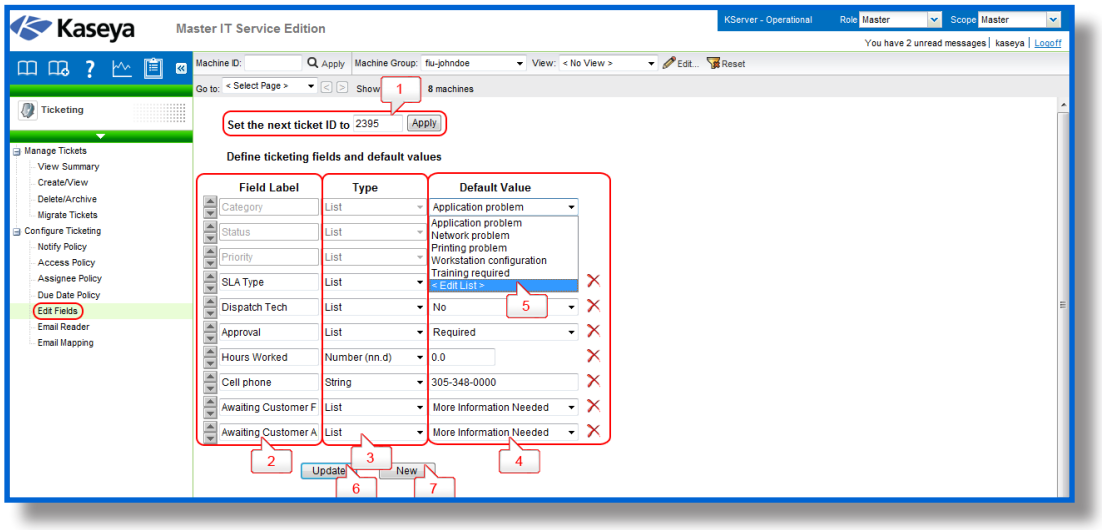


Fig. 8.9: *Edit Fields page*

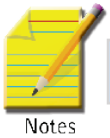
1. **Set the next ticket ID to N / Apply:** Specify the ticket number for the next ticket. Displays the current "next" ticket number. Click *Apply* to confirm any changes.

2. **Field Label:** You can modify the label for any field here. Click the *Update* button to apply the change.

3. **Type:** Specify the data type for each field.

- String - Can contain any text up to 500 characters in length. Best used to hold things like problem location or other variables that do not belong in the summary line.
- Integer - Can contain any positive or negative integer value
- List - Lets you create a drop-down list of choices. The choices for List type fields are edited by clicking the<Edit List> value in the Default Value drop-down list.
- Number (nn.d) - A number that always shows one digit to the right of the decimal point.
- Number (nn.dd) - A number that always shows two digits to the right of the decimal point.
- Number (nn.ddd)- A number that always shows three digits to the right of the decimal point.
- Number (nn.dddd) - A number that always shows four digits to the right of the decimal point.

4. **Default Value:** Creating a new ticket automatically sets each field to its default value. You can specify that default value here.



Note: *Default values are system wide and may not be different for different machine group IDs or user roles*

5. **<Edit List>:** This value displays in the drop-down list for a List type field in the Default Value column. Click *<Edit List>* to edit the list of values for that field.
6. **Update:** Click *Update* to confirm changes to field labels, default values, or List type values.
7. **New:** Click *New* to create a new field.

8.2.6 Email Reader

The **Email Reader** page specifies a POP3 email account to periodically poll. Email messages retrieved from the POP3 server are classified by Email Mapping and converted into tickets.
Alarm to Ticket Integration

When a VSA user clicks a New Ticket link typically for an alarm anywhere in the system, the **Ticketing** module converts it into a ticket. The **Ticketing** email reader does not have to be enabled.

Contents of Email
The Email Reader can receive any email, with or without attachments, and add the contents to the ticketing system. Additional information can be added to the email to enhance the mapping of the email to the ticketing system. The following tags can be included in either the subject or the body of the email.

- ~ticid=›xxx› - Appends the body of the email to an existing ticket rather than cause a new ticket to be created.
- ~username='xxx' - Automatically inserts the value given as xxx into the *Submitter Name* field.
- ~useremail='xxx' - Automatically inserts the value given as xxx into the *Submitter Email* field.
- ~userphone='xxx' - Automatically inserts the value given as xxx into the *Submitter Phone* field.
- ~category='xxx' - Assigns the ticket created to a specific category. The category must exist.
- ~priority='xxx' - Assigns the ticket created to a specific priority. The priority must exist.
- ~status='xxx' - Assigns the ticket created to a specific status. The status must exist.
- ~assignee='xxx' - Assigns the ticket created to a specific user. The user must exist.

• ~machineid='xxx.xxx' - Assigns the ticket created to a machine ID. The machine ID must exist. If this information is not included, and tickets are not assigned to a machine ID or group ID using Email Mapping, tickets are assigned to the unnamed group by default.

• ~fieldName='xxx' - Assigns the value xxx for any defined field. If the field is a List type, then the value must exist in the list.

Fig. 8.10 shows the generic view of the Email reader page. The functions supported on this page are listed and explained below.

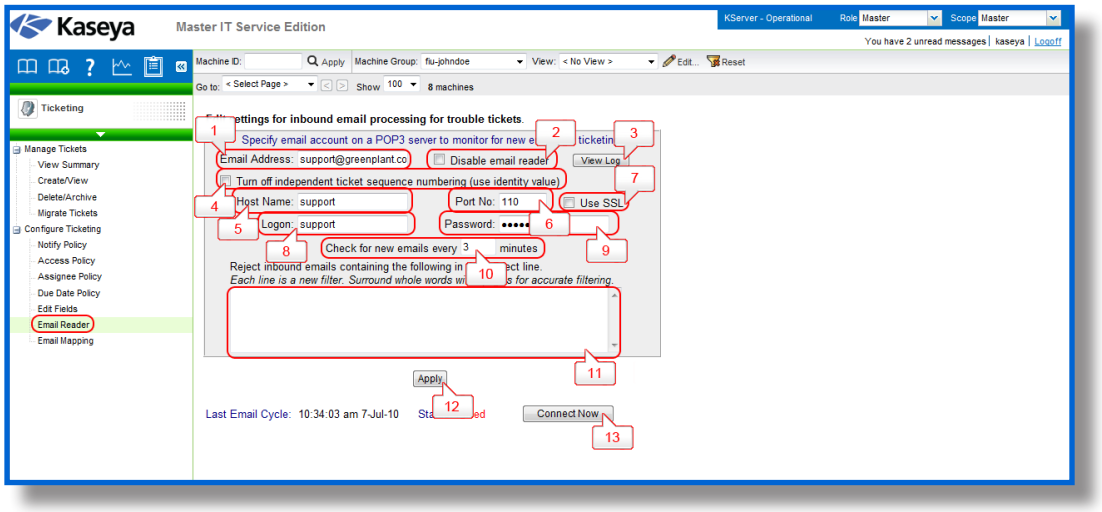


Fig. 8.10: *Email Reader page*

1. **Email Address:** Enter the email address you wish to retrieve email messages from periodically. Replies to this email address are in turn processed by the ticketing system and added as notes to the relevant ticket.

2. **Disable email reader:** Check this box to prevent the email reader component from polling a server.

3. **View Log:** Click *View Log* to review the polling log for this email reader.

4. **Turn off independent ticket sequence numbering (use identity value):** For partition 1, single tenant environments only, if checked, ticket numbers match the ticket numbers displayed in outbound emails. If unchecked, these two numbers can be different. These numbers always match in additional partitions.

5. **Host Name:** The name of the POP3 host service is needed. POP3 is the only email protocol supported. An example is pop.gmail.com.

6. **Port:** Provide the port number used by the POP3 service. Typically non-SSL POP3 ports are 110 and SSL POP3 ports are 995.

7. **Use SSL:** Check this box to enable SSL communications with your POP server. Your POP server must support SSL to use this feature. Typically, SSL enabled POP3 servers use port 995.

8. **Logon:** Enter the email account name. Do not include the @ domain name with the account name. For example, if the **Email Address** is jsmith@acme.com, then enter jsmith as the account name.

9. **Password:** Enter the email account password.

10. **Check for new emails every <N> minutes:** The number of minutes the Email Reader should wait before polling the POP3 server for new emails.

11. **Filter Emails:** Enter text to reject inbound emails containing this text *in the subject line*. Matching is case insensitive. *Quotes and wildcard characters such as * and ? are interpreted literally as part of the*

*string content.*Create multiple filters using multiple lines. Multiple filters act as an OR statement. Surround whole words with spaces on both sides of each word.

Example:

- Undeliverable
- Do not reply

12. Apply: Click *Apply* to begin using the email reader.

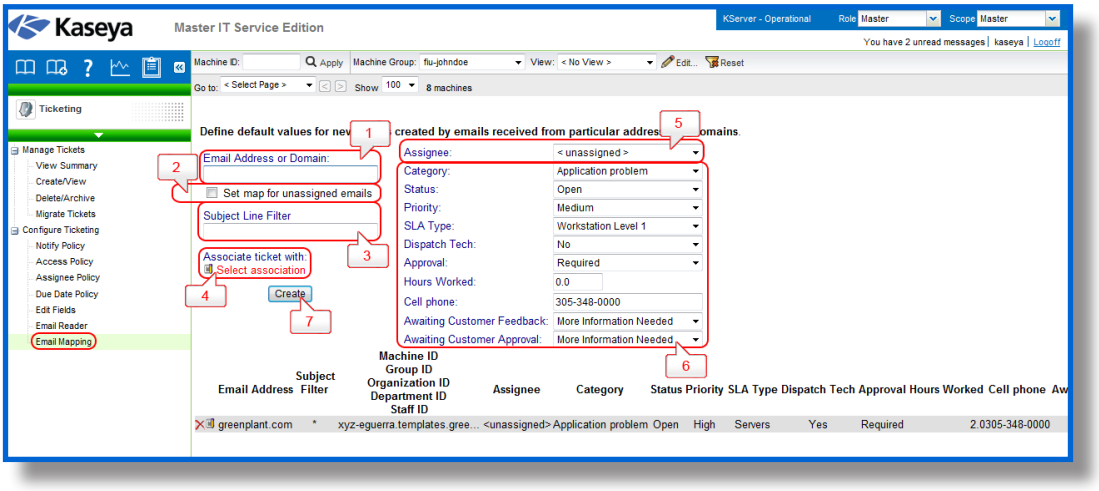
13. Connect Now: Click *Connect Now* to connect to the POP3 server immediately instead of waiting for the next polling time. This can be used to test your configuration of the email reader.

8.2.7 Email Mapping

The **Email Mapping** page assigns default values for **new tickets** created using the Email Reader. The default values assigned are based on the email address or email domain of the email *sender*. Matching can be optionally filtered by the text entered in the email subject line. This information overrides the standard defaults defined using Edit Fields.

Fig. 8.11 below shows the generic view of the Email Mapping page. The functions supported on this page are listed and explained below.

Fig. 8.11:
Email Mapping



1. **Email Address or Domain:** The email address or domain *of the sender*.

2. For example: jsmith@acme.com or acme.com.

3. **Set map for unassigned emails:** If checked, assigns default field values for inbound emails not covered by any other email map.

4. **Subject Line Filter:** Assigns ticket defaults when the email subject line matches the filter string. Matching is case insensitive. No wildcard processing is provided. A single *, without any other characters in the filter, means let anything through. Booleans statements are not accepted.

5. **Associate ticket with:** Click the *Select association* link to associate new tickets created using this map with a machine ID, machine group, organization, department or staff record.

6. **Assignee:** Enter the name of the VSA user assigned to new tickets created using this email map.

7. Fields: Specify the default field values assigned to new tickets created when an email is received by the ticketing system using this map.

8. Create: Click *Create* to create a new email map using the header values you have previously selected.