Kaseya

Our Automation. Your Liberation.™

Kaseya Service Desk Workshop

DAY ONE

Developed by

Kaseya University

Powered by

IT Scholars

Kaseya Version 6.2

Last updated on June 27, 2012

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Kaseya Service Desk Workshop

WORKSHOP INTRODUCTION

Kaseya Service Desk Workshop

- Pre-requisite
  - Kaseya Fundamentals Workshop
- What is covered?
  - Kaseya Service Desk
- Duration
  - 2 day, 3 hours of lecture and lab per day
  - 5 weeks or 35 days of access to portal and lab

What is included?

- **2 x 3 hours of instructor-led online sessions**
  - Delivered in two consequent days, 3 hours per day.
- **5 weeks (or 35 days) of unlimited access**
  - Training materials includes training videos, interactive videos, self-assessment quizzes, and reading material available 24x7.
- **80 hours of virtual lab**
  - Virtual labs include five dedicated virtual machines and one VSA account, accompanied with hands-on exercises and step-by-step instructions.
  - 40 hours will expire after the first week
  - 10 hours per week for the next 4 weeks
- **1 Certification Test**

Certification Test

- Available 24x7 during the 35 days
- The passing grade is **90** out of 100
- Includes two parts:
  - Theory
    - **30** points
    - 30 minutes for 30 multiple-choice or T/F questions
    - **Unlimited** number of attempts; highest-grade
  - Hands-on
    - **70** points
    - 2 hours to perform some randomly selected tasks
    - Only one attempt is included for free

Why do I need the certificate?

- With KSDCA your company will receive **Premium Service Status**.
  - Contact your sales person for details of the advantages of Premium Service Status.

- Adding KSDCA to your resume will make you **more competitive** in the IT market.

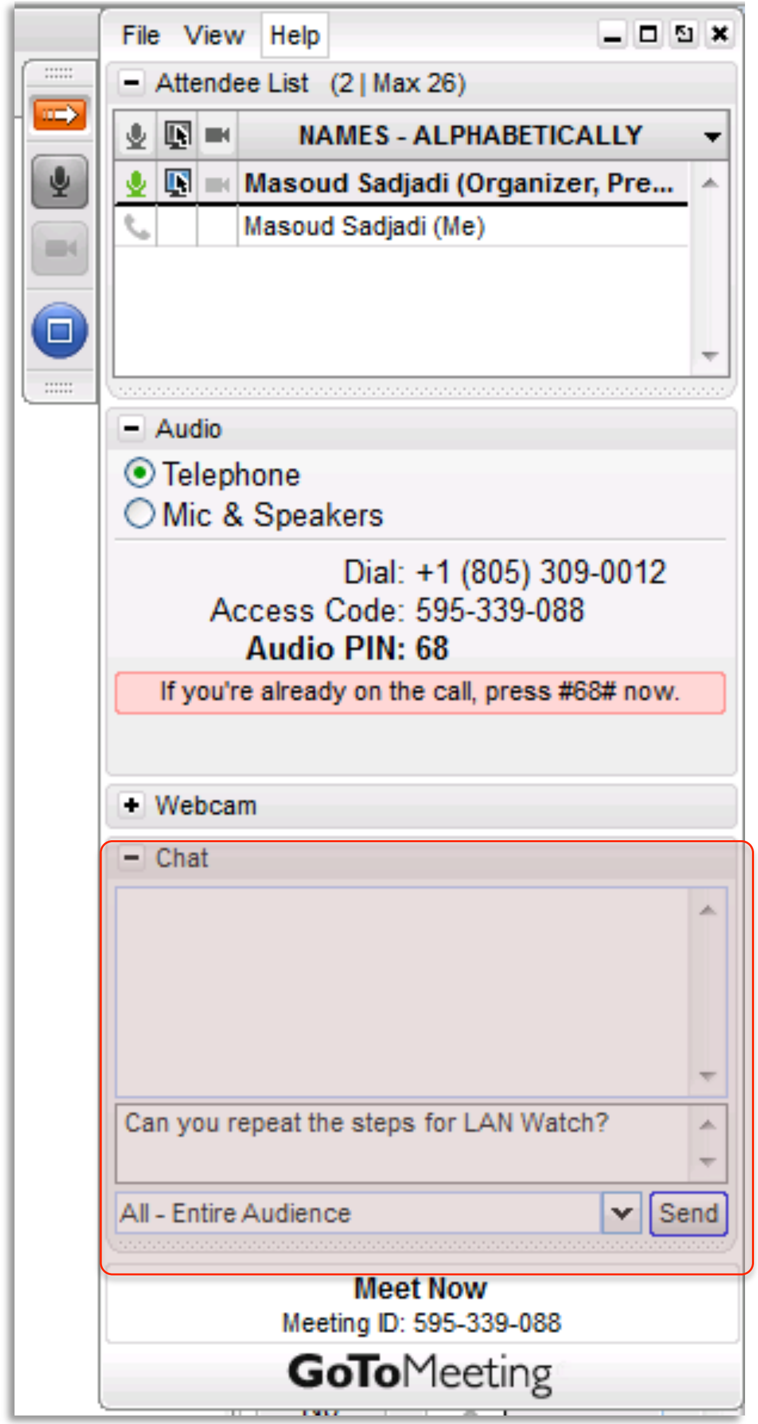
Roadmap!

- Day One
  - Introduction to Workshop and Virtual Labs
  - Kaseya Service Desk Overview
  - Creating Your First Service Desk
  - Defining Your Initial Service Desk Users

- Day Two
  - Day One Recap
  - Configuring Your Service Desk Users
  - Adding Automation to Your Service Desk

How can you ask your question?

- Type your question in the **GoToMeeting Chat**
- From time to time, I will stop to answer them
- If you have a burning question, you can also **raise your hand** to indicate that you need an answer quickly!
- For offline questions, send them to training@kaseya.com



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Kaseya Service Desk Workshop

Virtual Labs Overview

Creating Your Account

- It would have been best if you had created your account prior to the workshop.
- If you have not done so, please do NOT try to create your account now, as you may fall behind of the lecture topics. You can create your account during the break or after today's session.
- In the following slides, we will give you a quick overview of the process, so that you can create your account properly.

Note

- If you have created an account on www.it-scholars.com for another workshop (e.g., Kaseya Fundamentals Workshop), you do not need to create another account.
- You can simply use your previously created account. You just need to enroll into the new course.
- If you forgot your password, as long as you remember either your username or the email address that you used before, you can reset your password.

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It Is Your Turn!

Let’s Start!

- Go to www.it-scholars.com
- Create a new account

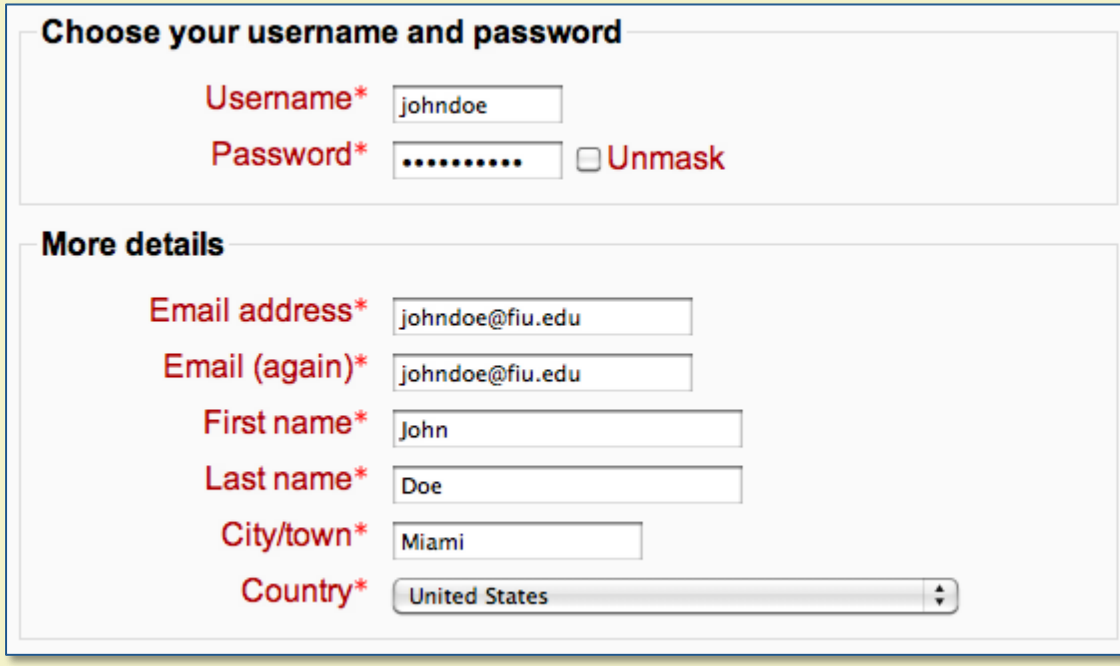
Is this your first time here?

If this is your first time visiting this Web site and you would like to request for an account, you need to fill out the New Account form. An email will be immediately sent to your email address, indicating that your request was sent to the site administrator. Once your account is confirmed, you will be notified. Note that this process may take up to 24 hours. However, if you were told that you would need to first attend an orientation session, your account will be confirmed right before your scheduled orientation session.

Create new account

Create a New Account

It Is Your Turn!



Choose your username and password

Username* johndoe

Password* •••••••••• Unmask

More details

Email address* johndoe@fiu.edu

Email (again)* johndoe@fiu.edu

First name* John

Last name* Doe

City/town* Miami

Country* United States

- The required fields are marked by *
- Username should be in the format of *firstname.lastname and* should NOT include: " / \ [ ] : ; | = , + * ? < > @
- Do not use your bank account password
- A good password is 6 to 10 characters long
- Use your work email

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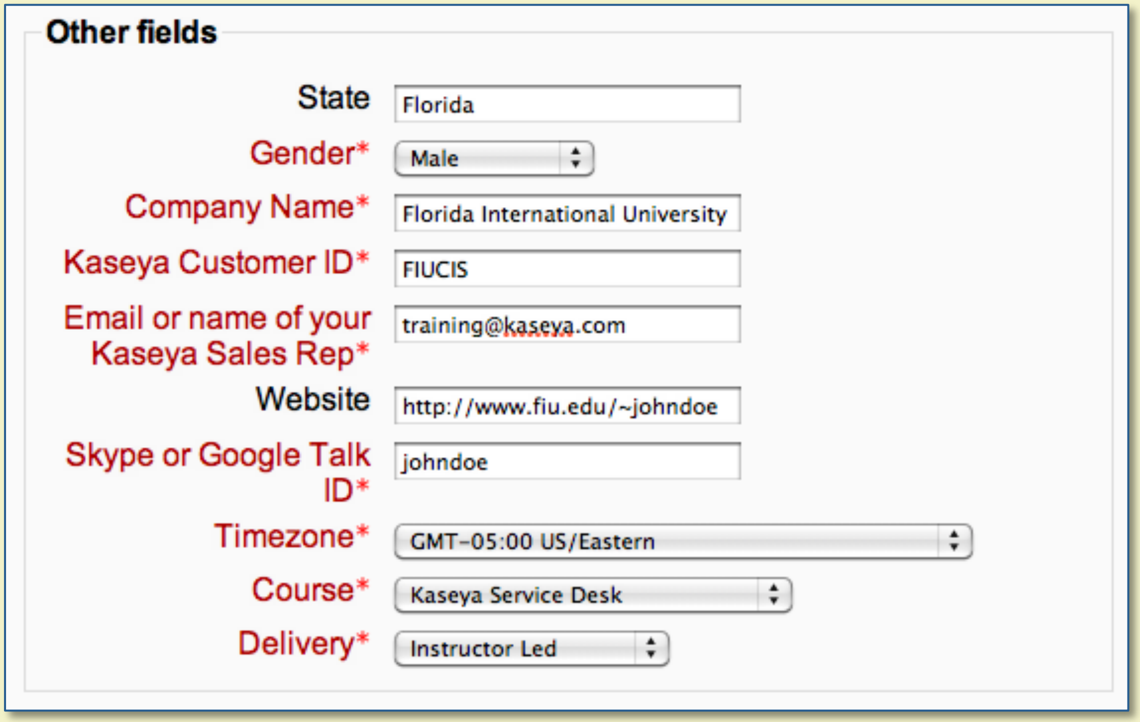
It Is Your Turn!

Create a New Account



- Your Kaseya Customer ID is the first 6 letters of your Kaseya License Code (see *System > License Manager*).
- If you do not have a Skype/Google account, enter: “Do not have one!”
- If you do not know what is your Kaseya Sales Rep’s email, just enter: “training@kaseya.com".
- For the course, select “Kaseya Service Desk”
- For the delivery, select “Instructor Led” or “Self-Paced” as applicable.

Note

- After clicking on *Create my new account* button, you may receive a "**Session Key Error**" message
- This is related to the Cookie security settings in your browser.
- You can add www.it-scholars.com to list of your trusted sites to address this issue.
- Alternatively, you can use Chrome as its default security settings are more relaxed than other mainstream browsers.

Create New Account

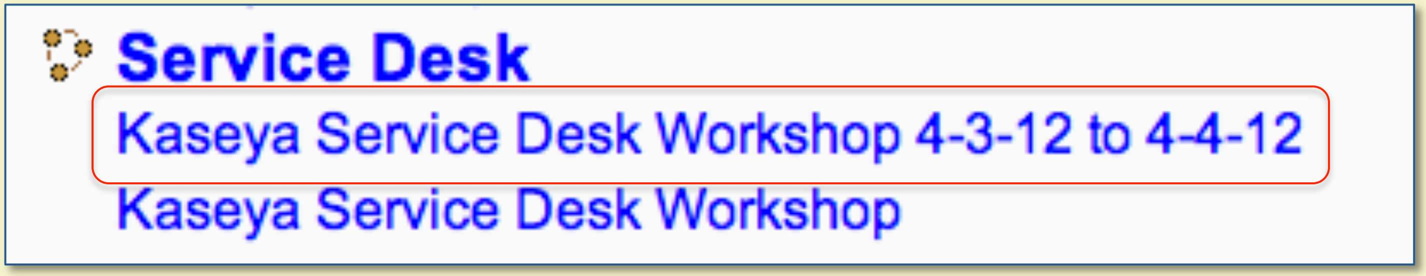
- Once successfully submitted, you will receive an email confirmation with a link to confirm your account.
- After visiting the confirmation link, you can login to the portal
  - www.it-scholars.com
  - Chrome is a preferred browser

It Is Your Turn!

Enroll In This Week's Kaseya Service Desk Course

It Is Your Turn!

- Once successfully logged in, click on the Kaseya Service Desk course for this week



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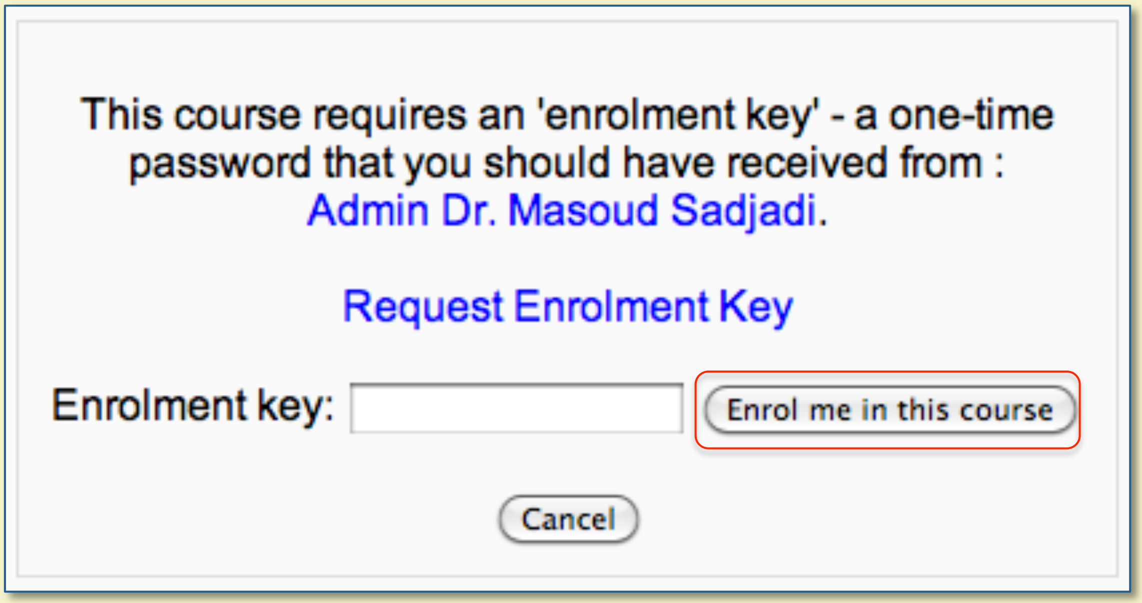
It Is Your Turn!

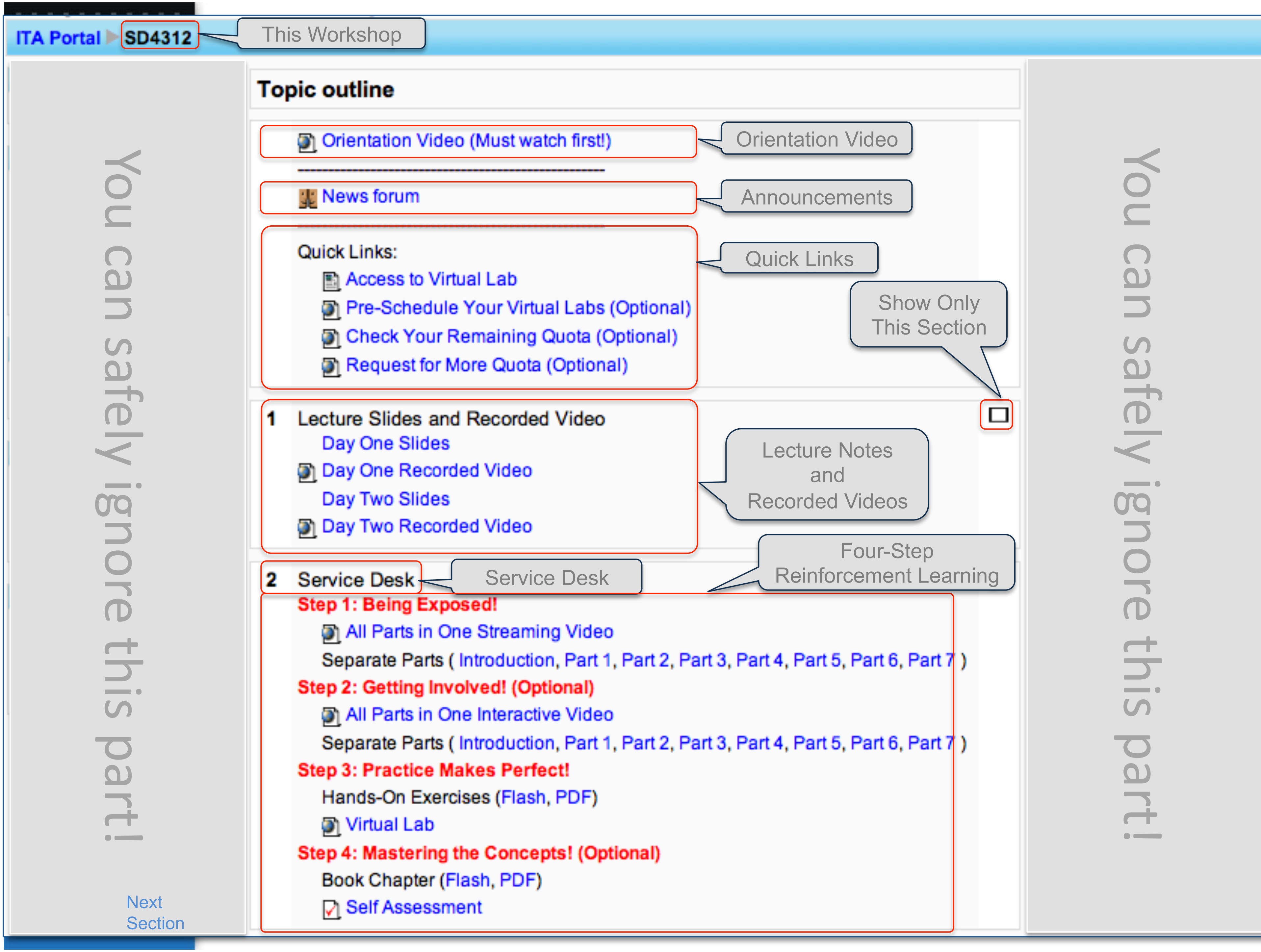
Enroll In this week's Kaseya Service Desk Course

- The enrollment key is ***2012***



- Or the instructor would provide the key

www.kaseya.com



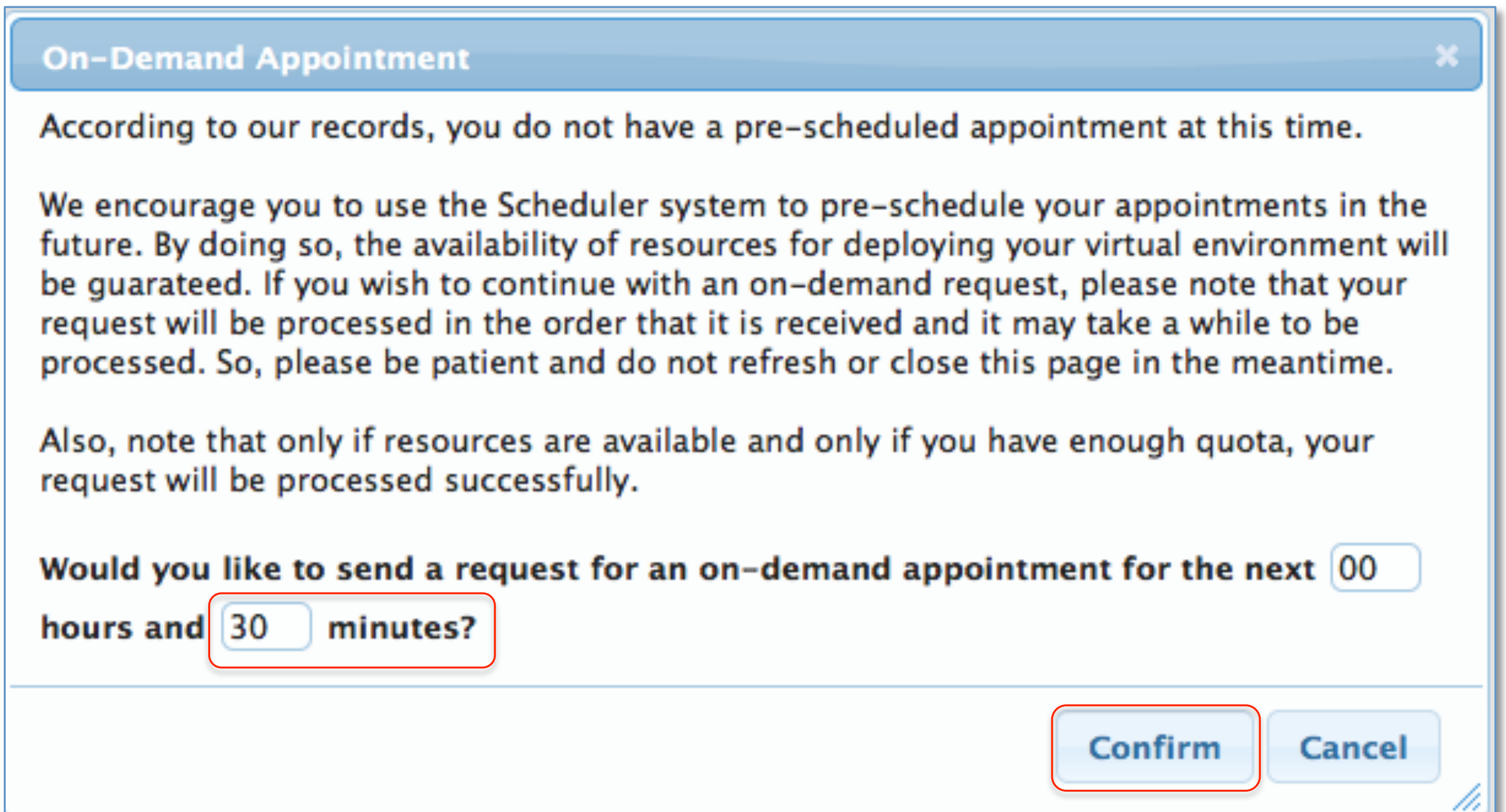
ITA Portal ▶ SD4312
This Workshop
Topic outline
Orientation Video (Must watch first!)
Orientation Video
News forum
Announcements
Quick Links:
Access to Virtual Lab
Pre-Schedule Your Virtual Labs (Optional)
Check Your Remaining Quota (Optional)
Request for More Quota (Optional)
Quick Links
Show Only This Section
1 Lecture Slides and Recorded Video
Day One Slides
Day One Recorded Video
Day Two Slides
Day Two Recorded Video
Lecture Notes and Recorded Videos
2 Service Desk
Service Desk
Four-Step Reinforcement Learning
Step 1: Being Exposed!
All Parts in One Streaming Video
Separate Parts (Introduction, Part 1, Part 2, Part 3, Part 4, Part 5, Part 6, Part 7)
Step 2: Getting Involved! (Optional)
All Parts in One Interactive Video
Separate Parts (Introduction, Part 1, Part 2, Part 3, Part 4, Part 5, Part 6, Part 7)
Step 3: Practice Makes Perfect!
Hands-On Exercises (Flash, PDF)
Virtual Lab
Step 4: Mastering the Concepts! (Optional)
Book Chapter (Flash, PDF)
Self Assessment
You can safely ignore this part!
You can safely ignore this part!
Next Section

Workshop Course Home Page

- News forum
  - No need to visit this link as you receive an email for any announcements posted.
- Quick Links:
  - Access Your Virtual Lab
    - You can access an already scheduled virtual lab or schedule one on-demand.
  - Pre-Schedule Your Virtual Lab (Optional)
    - You can pre-schedule, edit, and cancel your virtual labs and certification tests.
  - Check for Your Remaining Quota (Optional)
    - You can check how much of your quota is still available.
  - Request for More Quota (Optional)
    - You can request for more quota, if need be.

Access Your Virtual Lab

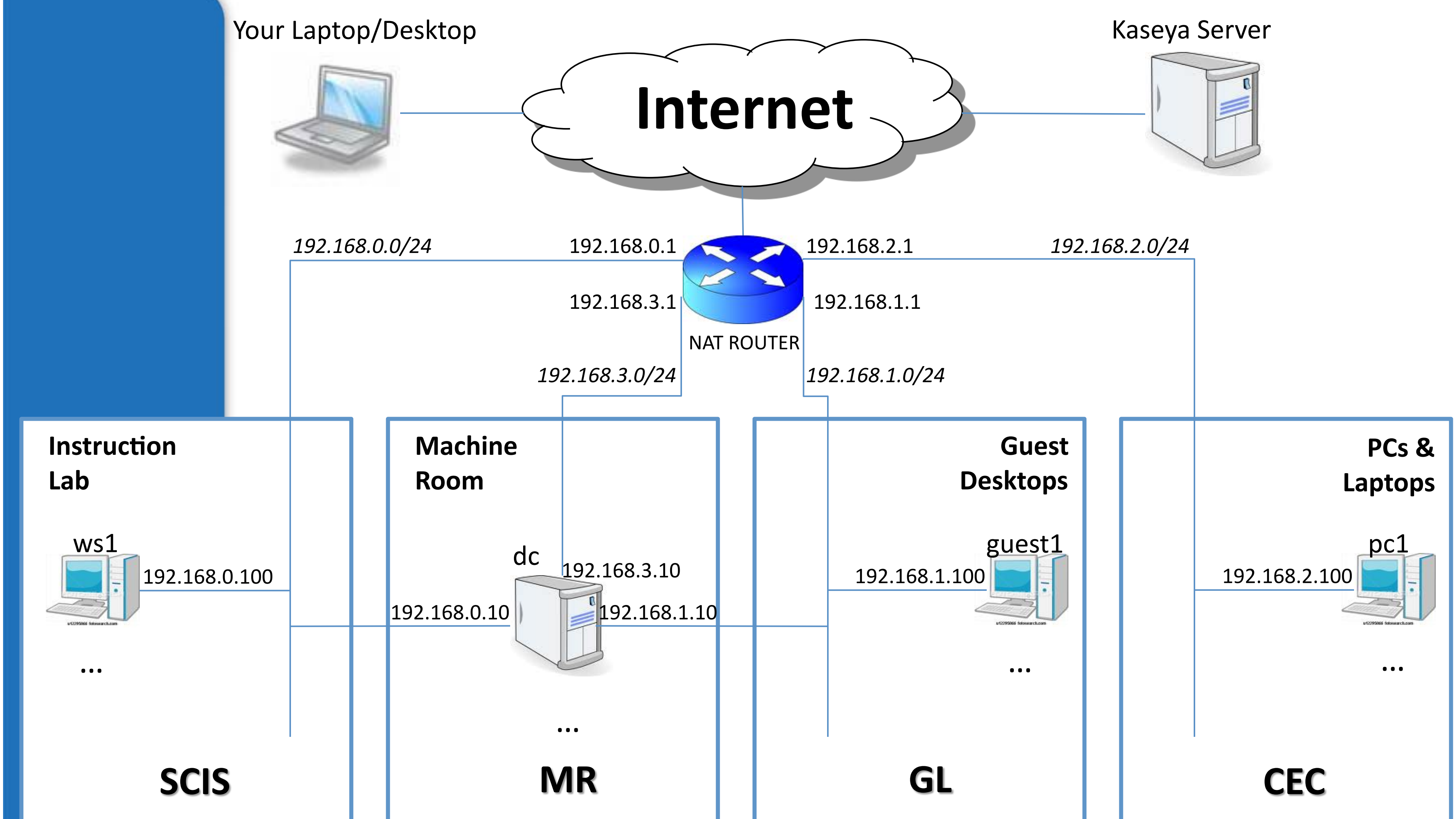
- If you have not scheduled your virtual lab yet, you will see this window, allowing you to schedule your virtual lab on demand. Schedule for 3 hours.



Workshop Course Home Page (cont.)

- Lecture Slides and Recorded Videos
  - The most updated lecture slides and recorded videos can be downloaded from the links listed here.
- Day One
  - The Service Desk modules has its own separate section.
  - It follows the Four-Step Reinforcement Learning Process.
  - You can click on the hollow square on the right side of each separate section to focus on the training materials listed under only that section.

FIU's Network Diagram



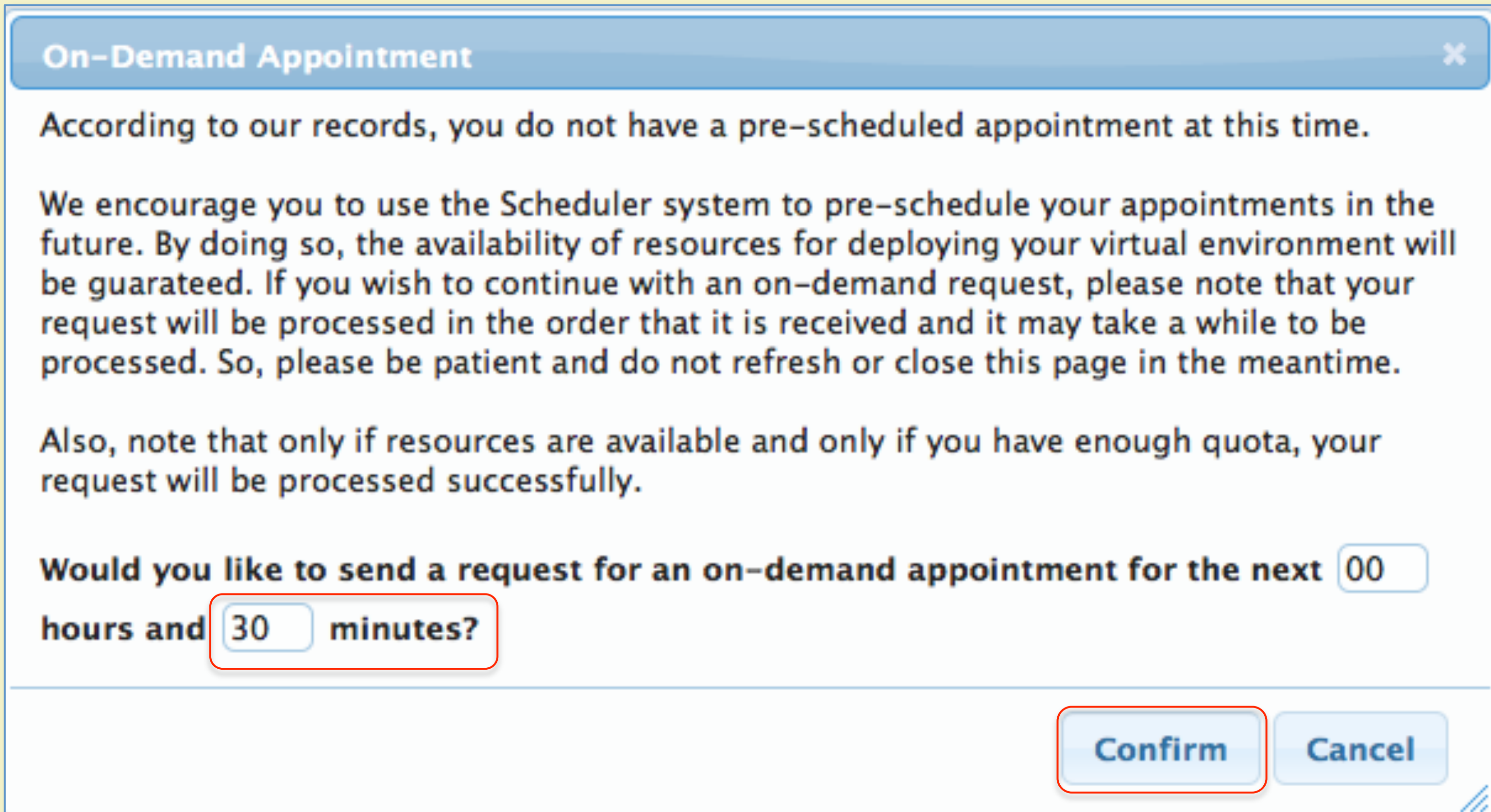
Technical Information

- KServer: **saas12.kaseya.net**
- NAT Router has 4 network cards:
  - 192.168.0.1, 1.1, 2.1 and 3.1
- SCIS hosts workstation 1 (**ws1**) with one card:
  - ws1.scis.fiu.edu - 192.168.0.100
- MR hosts domain controller (**dc**) with 3 cards:
  - dc.mr.fiu.edu - 192.168.0.10, 1.10, and 3.10
- GL hosts guest 1 (**guest1**) with one card:
  - guest1.gl.fiu.edu - 192.168.1.100
- CEC hosts personal computer 1 (**pc1**) and laptop 1 (**laptop1**), each with one card:
  - pc1.cec.fiu.edu - 192.168.2.100
  - laptop1.ced.fiu.edu – 192.168.2.200

Let's Start Our Virtual Labs

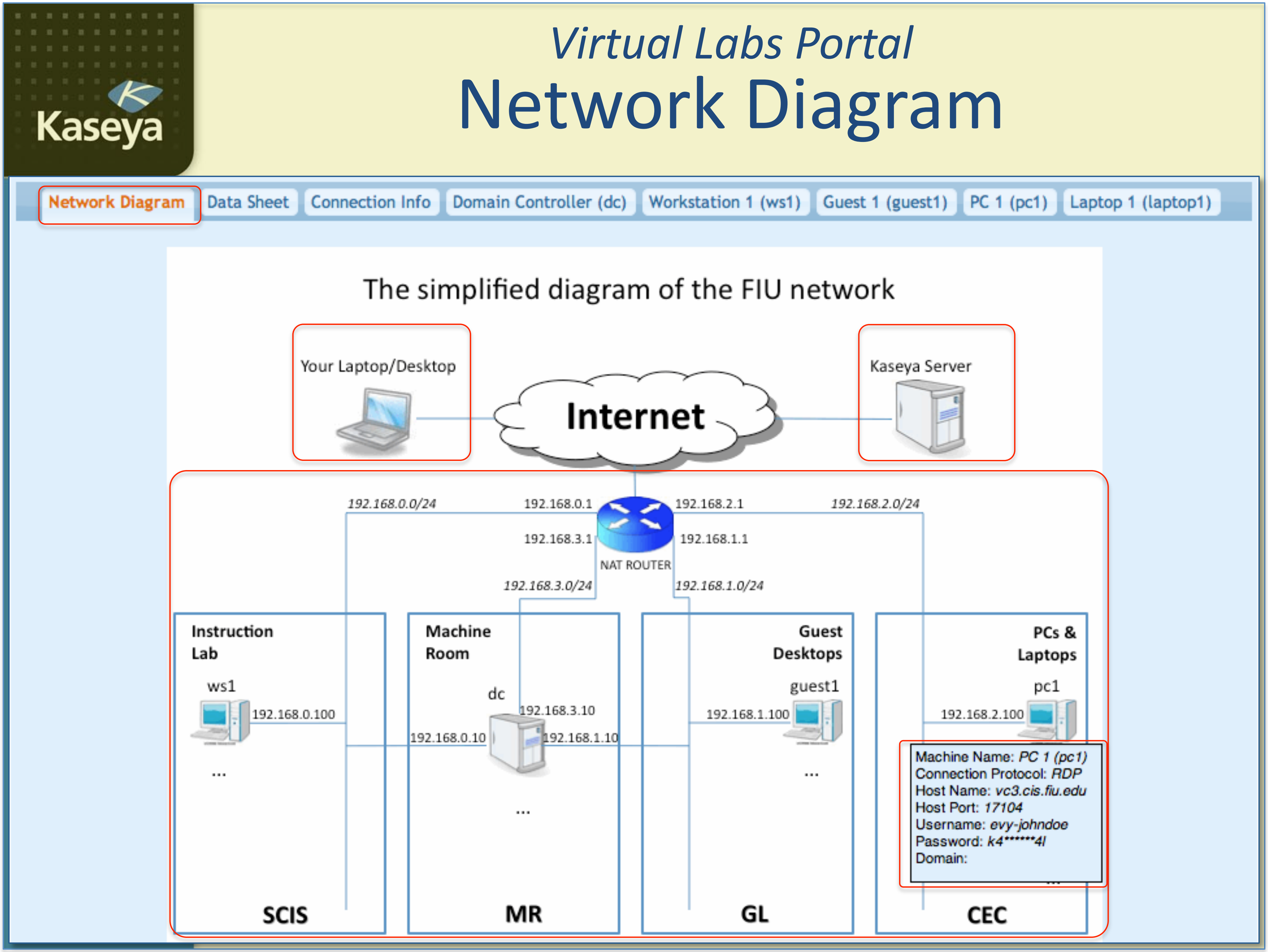
It Is Your Turn!

- Find the link to *Virtual Lab* and clink it.
- Simply enter *hours/minutes* and *Confirm*.
- Three hours may be sufficient for today.



Virtual Labs Portal

Network Diagram



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Virtual Labs Portal

Data Sheet

Network Diagram | **Data Sheet** | Connection Info | Domain Controller (dc) | Workstation 1 (ws1) | Guest 1 (guest1) | PC 1 (pc1) | Laptop 1 (laptop1)

Variables	Values
<USERNAME>	ena-johndoe
<PASSWORD>	k4******4l Note: This is the same password you used to login to Moodle.
<DOMAIN_ADMIN_CREDENTIALS>	(ena-johndoe, k4******4l, FIU)
<LOGIN_CREDENTIALS>	(ena-johndoe, k4******4l, FIU) or just (ena-johndoe, k4******4l)
<LOGIN_CREDENTIALS> for user Student	(Student, k4******4l, FIU) or just (Student, k4******4l) Note: The Student password is same as yours.
<NAT_ROUTER_IP>	vc3.cis.fiu.edu
<DC_RDP_PORT>	17101
<WS_RDP_PORT>	17102
<GUEST_RDP_PORT>	17103
<PC_RDP_PORT>	17104
<LAPTOP_RDP_PORT>	17105

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Virtual Labs Portal

Connection Info

- Link to the KServer
- RDP connection information to your five dedicated virtual machines
  - HostName:PortName

Network Diagram | Data Sheet | Connection Info | Domain Controller (dc) | Workstation 1 (ws1) | Guest 1 (guest1) | PC 1 (pc1) | Laptop 1 (laptop1)

#	Machine Name	Connection Protocol	Host Name	Host Port	Username	Password	Domain
1	Kaseya Server	http	http://saas12.kaseya.net:80	80	johndoe	k4******4l	
2	Domain Controller (dc)	RDP	vc3.cis.fiu.edu	17101	ena-johndoe	k4******4l	FIU
3	Workstation 1 (ws1)	RDP	vc3.cis.fiu.edu	17102	eli-johndoe	k4******4l	FIU
4	Guest 1 (guest1)	RDP	vc3.cis.fiu.edu	17103	eve-johndoe	k4******4l	FIU
5	PC 1 (pc1)	RDP	vc3.cis.fiu.edu	17104	evy-johndoe	k4******4l	
6	Laptop 1 (laptop1)	RDP	vc3.cis.fiu.edu	17105	ewa-johndoe	k4******4l	

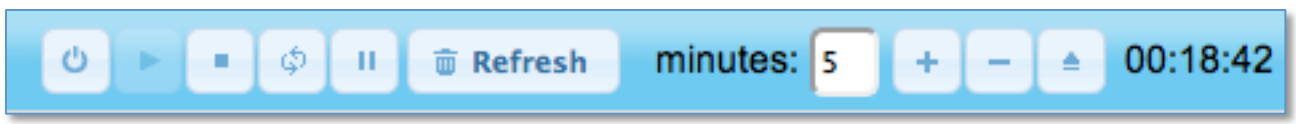
Goto Service Desk Slide

Alternative Ways to RDP to Your Virtual Machines

- You can use any RDP client of your choice
  - Windows
    - Microsoft Terminal Server Console (mstsc.exe)
  - MAC
    - Remote Desktop Connection
    - CoRD
  - Linux
    - Rdesktop
  - Web Browser
    - webRDP, an applet embedded in the Virtual Lab Portal
  - ...

Control Buttons and Timer

- You do not need these buttons for any of the exercises, but just in case you want full control over your dedicated machines, they are provided to you.



- **Note:** Refresh provides you with a fresh copy of the virtual machine!
- Using + or – you can adjust the remaining time of your virtual lab.
- Use the eject button to cancel your lab.

Roadmap!

- Day One
  - ✓Introduction to Workshop and Virtual Labs
  - ✓Kaseya Service Desk Overview
  - – Creating Your First Service Desk
  - – Defining Your Initial Service Desk Users
- Day Two
  - – Day One Recap
  - – Configuring Your Service Desk Users
  - – Adding Automation to Your Service Desk

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Kaseya Service Desk Overview

Some Definitions

- **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 into **end users** who are the actual users of the service and **contacts** who represent end users.
- We divide IT employees into **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.

Some Definitions

- A **support issue** may be
  - asking a question
  - reporting a problem
  - requesting for a service
  - suggesting a new feature

  Support issues will be referred as **tickets**. Note how tickets will be created in the Service Desk?

  Service Desk (manual), email reader, Kaseya Live Connect, or Kaseya monitoring alerts.
- A **resource pool**
  - is a group of technicians allocated to a specific or general area of service.
  - We may refer to resource pools simply as **pools**.
  - These helpdesk technicians will require a Service Desk Admin or Technician license. These technicians will be associated to a POOL

Some Definitions

- **Types of service desks** include
  - **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, live online 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.
- Service Desk Workshop will focus only on help desks operations.

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, your 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 minimizing response time.

Designing Service Desks

- To design a simplified and efficient desk
  - You must be fully aware of the needs of your users and based on that define the required **ticket properties**, such as, status, priorities, categories, severities, resolutions, etc.
  - Define the ticket life cycle or the **workflow** of your desk using stages. Your transitions, and their automated behavior are defined by procedures and other desk properties.
  - Be fully aware of the skill set and experience of your **resources.** Define their roles and associate them to appropriate resource pools.

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Creating Your First Service Desk

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Service Desk Lab

Part 1

Check Your Service Desk Licenses

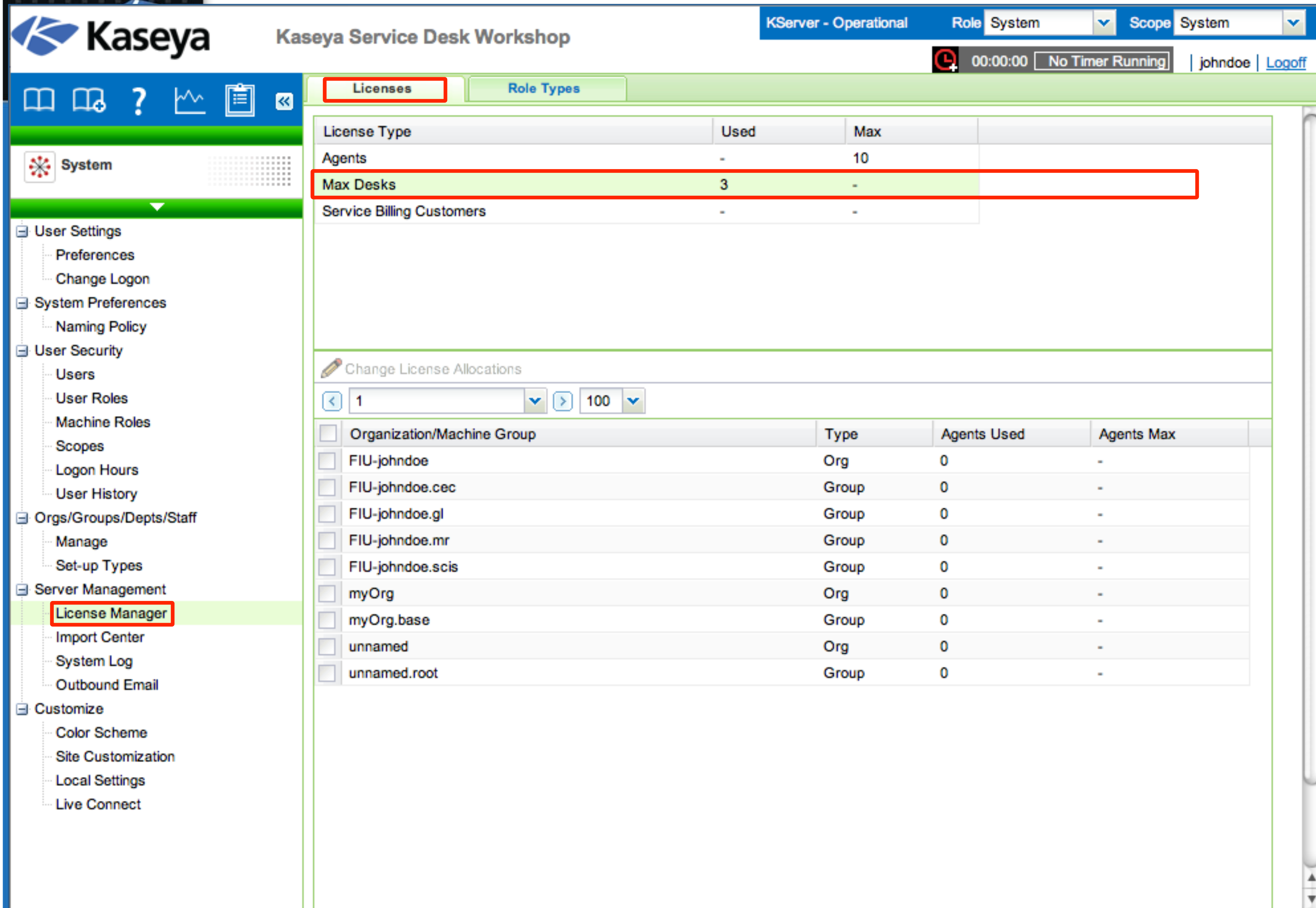
Service Desk Creation Checklist

✓ Check your licenses for desks and users
- Define your desk using a desk template
- Review the service desk fields/properties
- Review the service desk stages/workflow
- Define a default policy with coverage hours
- Review message templates
- Review procedure variables
- Setup an email reader
- Activate the new desk

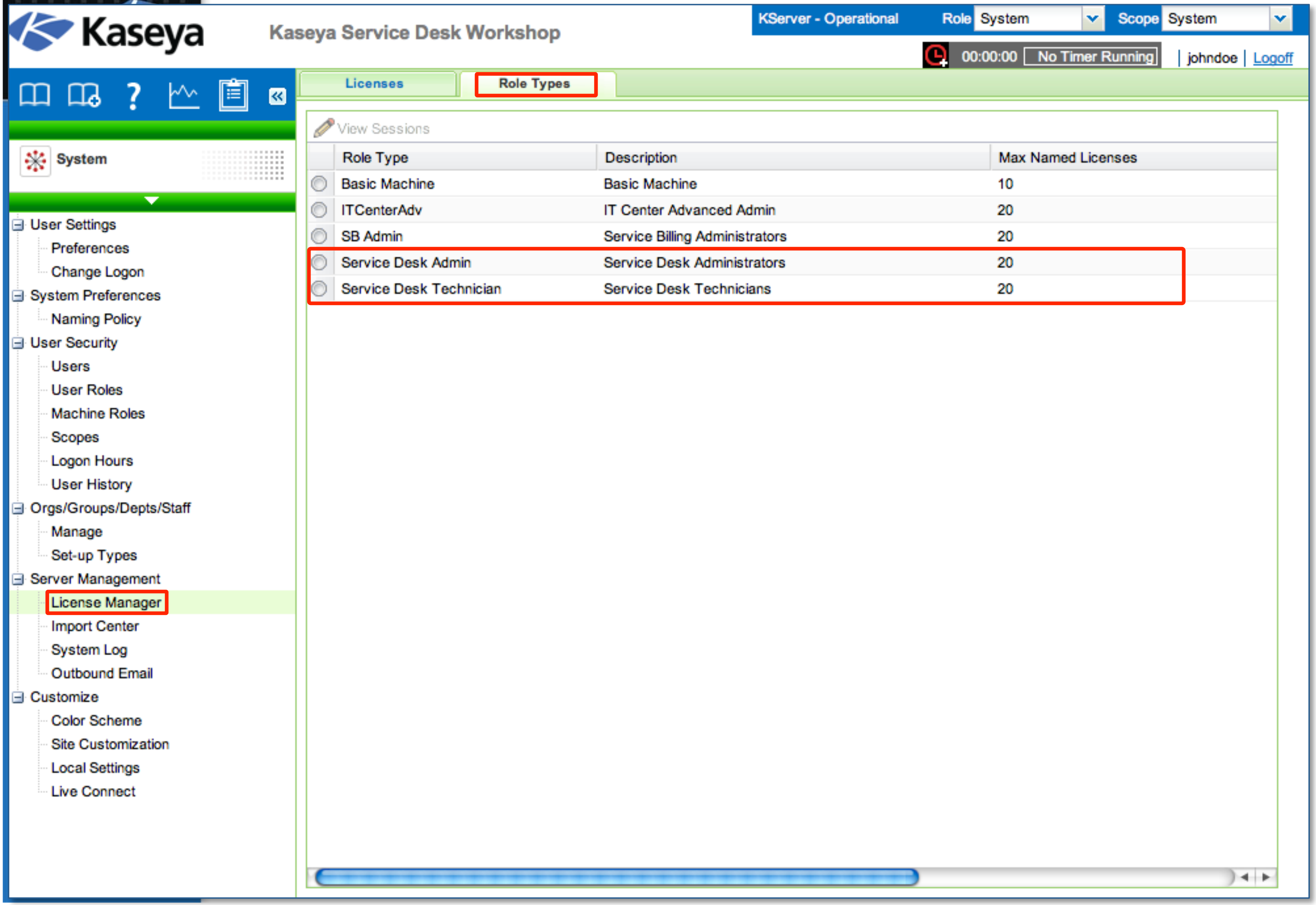
Check Your SD Licenses

- Check your Desk Licenses
- Check your User Licenses (SD User Role Types)
  - Service Desk Admin
  - Service Desk Technicians

Check Your Desk Licenses



Check Your User Licenses



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Service Desk Lab

Part 2

Define Your Desk Using the ITIL Incident Template

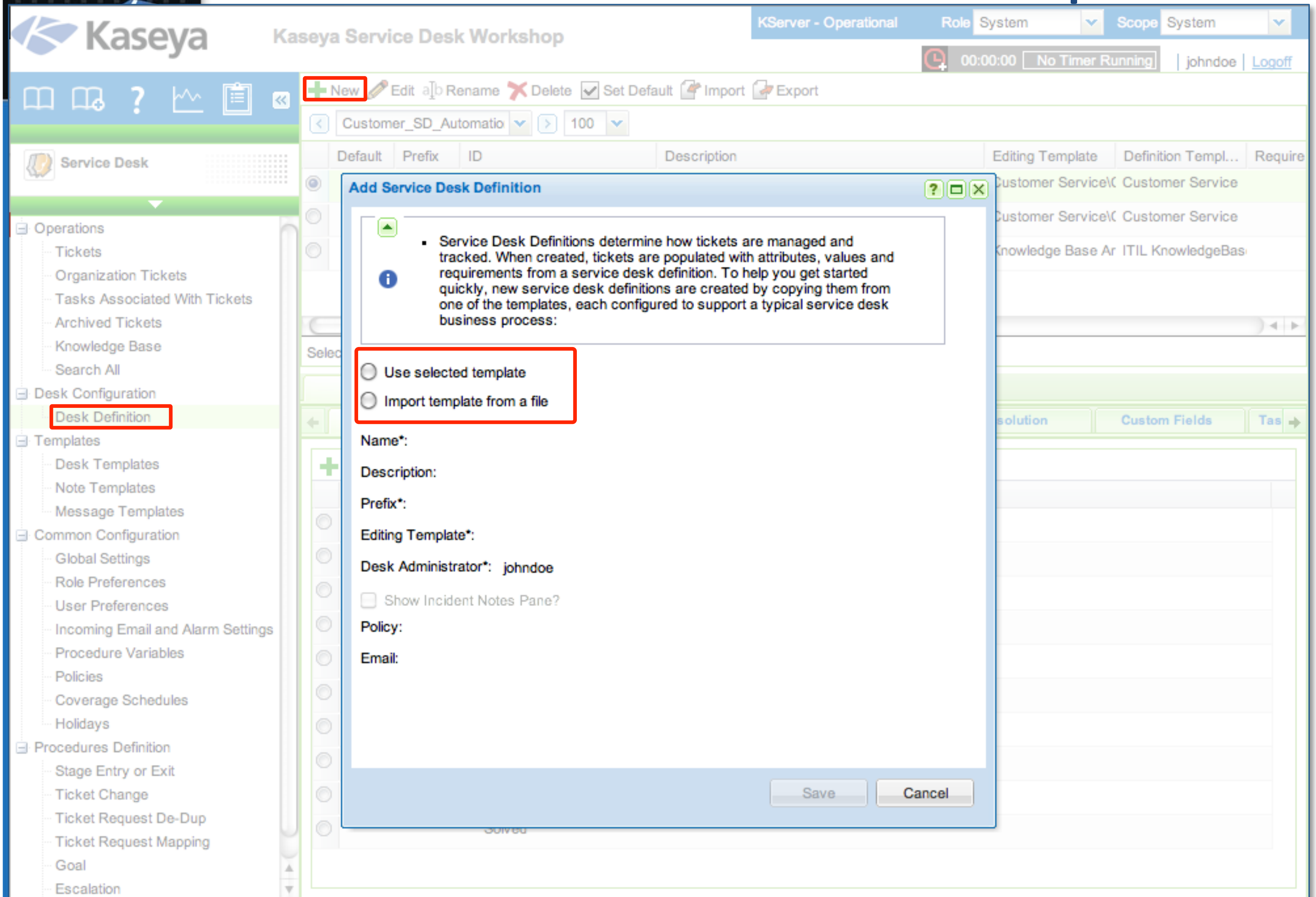
Service Desk Creation Checklist

- ✓ Check your licenses for desks and users
- ✓ Define your desk using a desk template
- Review the service desk fields/properties
- Review the service desk stages/workflow
- Define a default policy with coverage hours
- Review message templates
- Review procedure variables
- Setup an email reader
- Activate the new desk

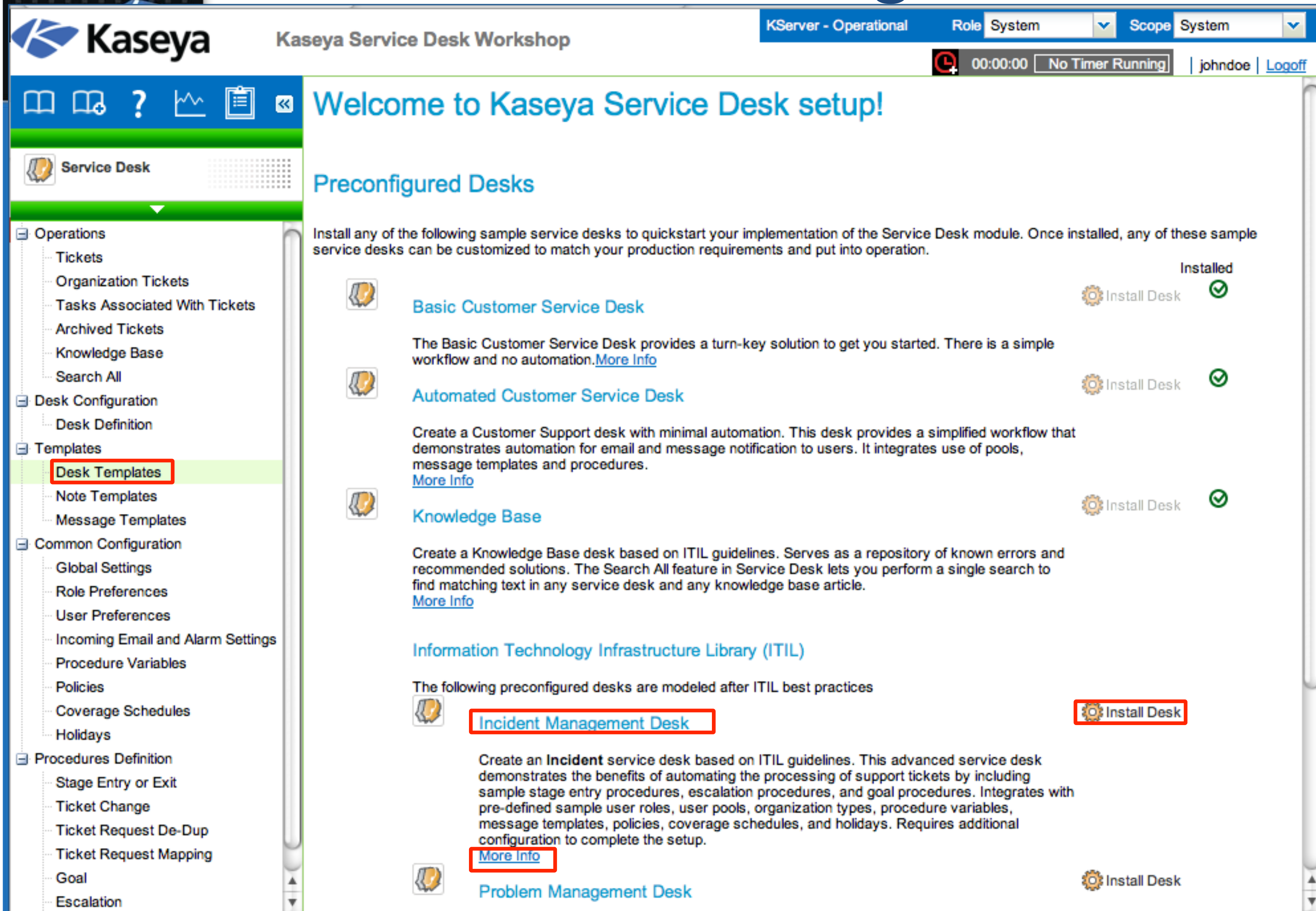
Service Desk Templates

- Instead of creating a service desk from scratch you can jump start by using a desk template.
- 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.
- Options to create a desk using templates?
  – Create a desk from a template
  – Install a pre-configured desk

Create Desk from a Template



Install a Pre-Configured Desk



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More Information

- For each preconfigured desk or desk template review the *More Info* link to view the steps necessary to complete the desk configuration.

Contents

Setup Incident Service Desk

The Incident service desk, based on ITIL guidelines, is a more advanced service desk. The **Incident** service desk demonstrates the benefits of *automating* the processing of support tickets by including sample stage entry procedures, escalation procedures, and goal procedures. This service desk integrates with pre-defined sample user roles, user pools, organization types, procedure variables, message templates, policies, coverage schedules, and holidays. **Additional configuration is required to use this service desk.**

> **Note:** See Service Desk Priority Calculations for an explanation of how the **Incident** service desk sets priorities using a sub-procedure.

Prerequisites

You may or may not have the following data already defined in your VSA. If not, you'll have to create them.

- **Create a Review Team** - Identify, or if necessary create, a small group of users to act as your initial *"review team"* for the **Incident** sample service desk. You'll need to specify these names in certain steps below. After you complete the configuration, you can repeat the user-specific steps to add more users to your review team.
- **Create Organizations** - Identify, or if necessary create, a small set of organizations and agent machines within those organizations. You'll need at least 3 organizations, one for each of the 3 different organization types described below. This is necessary to demonstrate how to associate a ticket with an organization and organization type or with an agent machine. Organizations are maintained using System > **Manage**.
- **Create Contacts** - Identify, or if necessary create, at least one department within an organization and at least one staff member within that department. This is necessary to demonstrate how to associate a ticket with the staff member of an organization. Contacts are maintained using System > **Manage**.

Configuration

1. **Create the Desk** - Click the **Install Desk** button for the `Incident Management Desk` using Service Desk > **Desk Templates**.
2. **Assign Users to User Roles** - Assign users requiring access to the **Service Desk** module to user roles—such as `SD User` or `SD Admin`—that use the `Service Desk Administrators` or `Service Desk Technicians` role type.
3. **Associate the Desk with User Roles** - *This service desk is automatically associated with the* `SD User` *role.* If you assign users to a user role that uses the `Service Desk Technicians` role type, you must associate this desk with that user role using Role Preferences or the Desk Definition > Access > Roles tab.

   This step is not necessary for users assigned to user roles—such as `SD Admin`—that use the `Service Desk Administrators` role type.
4. **Assign the Desk to Scopes** - Assign this desk to the *scopes* of users who use roles—such as `SD User`—that use the `Service Desk Technicians` role type.

   This step is not necessary for users assigned to user roles—such as `SD Admin`—that use the `Service Desk Administrators` role type.
5. **Assign Organization to Organization Types** - Assign customer organizations to one of the following organization types using System > Orgs/Groups/Depts > Manage.
   - `Gold_SLA`
   - `Silver_SLA`
   - `Bronze_SLA`
6. **Assign Users to Pools** - Assign *all* review team members to *each* of the following user pools within the `Incident` desk. This allows your review team to see each step in the life cycle of a ticket. Once your review team is familiar with the entire life cycle, you can assign different users to different user pools. You assign users to user pools using Service Desk > Desk Definition > Access > Pools. *Your*

Which Service Desk Template?

- The following service desk templates are predefined by Kaseya:
  - Basic Customer Service Desk
  - Automated Customer_Service Desk
  - Knowledge Base
  - ITIL Incident Management Desk
  - ITIL Problem Management Desk
  - ITIL Change Request Desk
- We chose the ITIL Incident Management Desk as it is in part based on ITIL standards and is the most comprehensive one.

The ITIL Incident Service Desk

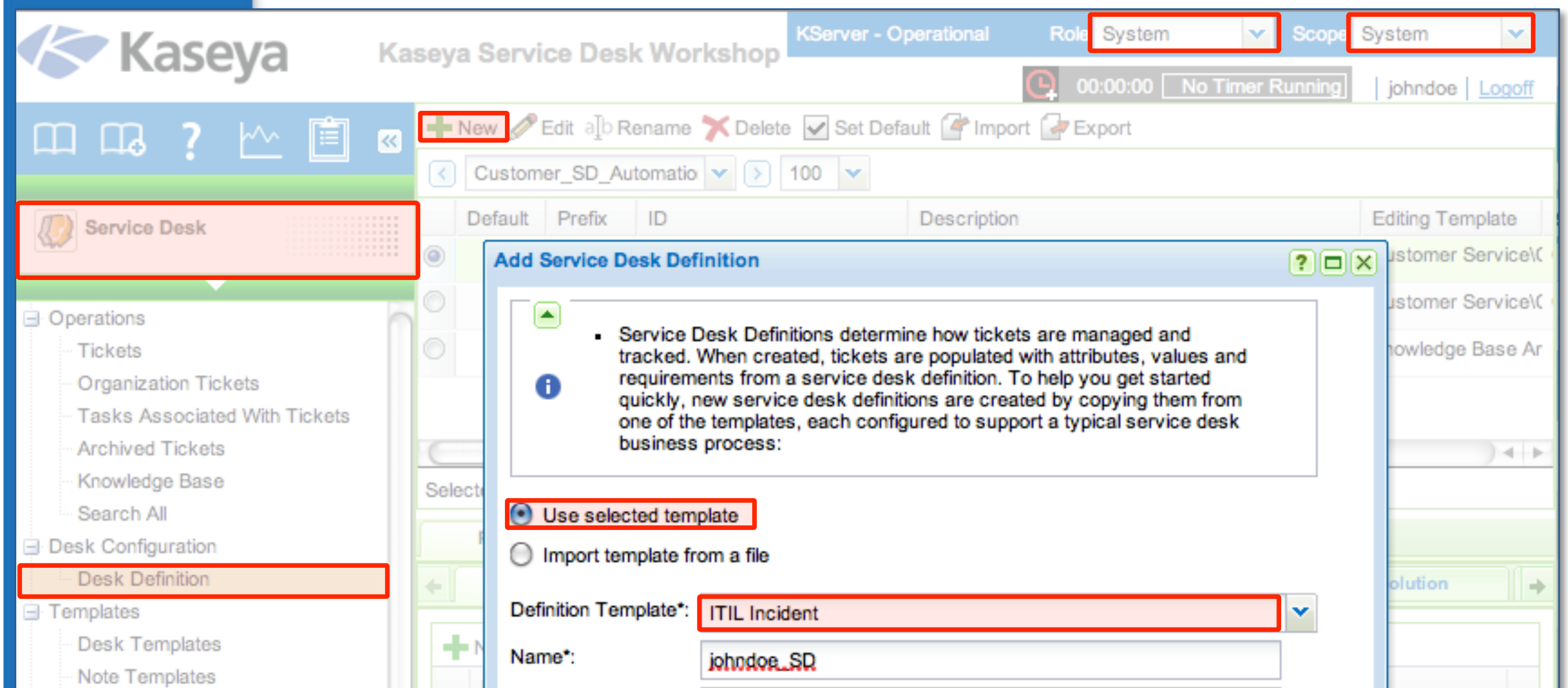
- It is based on ITIL guidelines.
- It is an advanced service desk.
- It benefits from automating the processing of support tickets by including basic stage entry procedures, escalation procedures, and blank goal procedures.
- It integrates with appropriate user roles, user pools, organization types, procedure variables, message templates, policies, coverage schedules, and holidays.

Note

- Additional configuration is required before the ITIL Incident Management Desk can be used to address specific needs of different IT organizations.

Create a New Service Desk

1. Open the *Service Desk* module.
2. Go to *Desk Configuration > Desk Definition.*
3. Click on *New.* The *Add Service Desk Definition* window will appear.
4. Click on the *Use selected template* radio button.
5. Select *ITIL Incident* from the *Definition Template* dropdown menu.



Review Desk Definition

- General Info
  - Global options for the behavior of the Desk
- Standard Field Default
  - Define Default values for the Service Desk fields and policy
- Define the Desk Procedures for:
  - Changed Procedure, any change for the ticket will run the Change Procedure defined.
  - Goal Procedure defined here will process a ticket when a Goal Time has been met.

Ticket Change and Goal Procedure

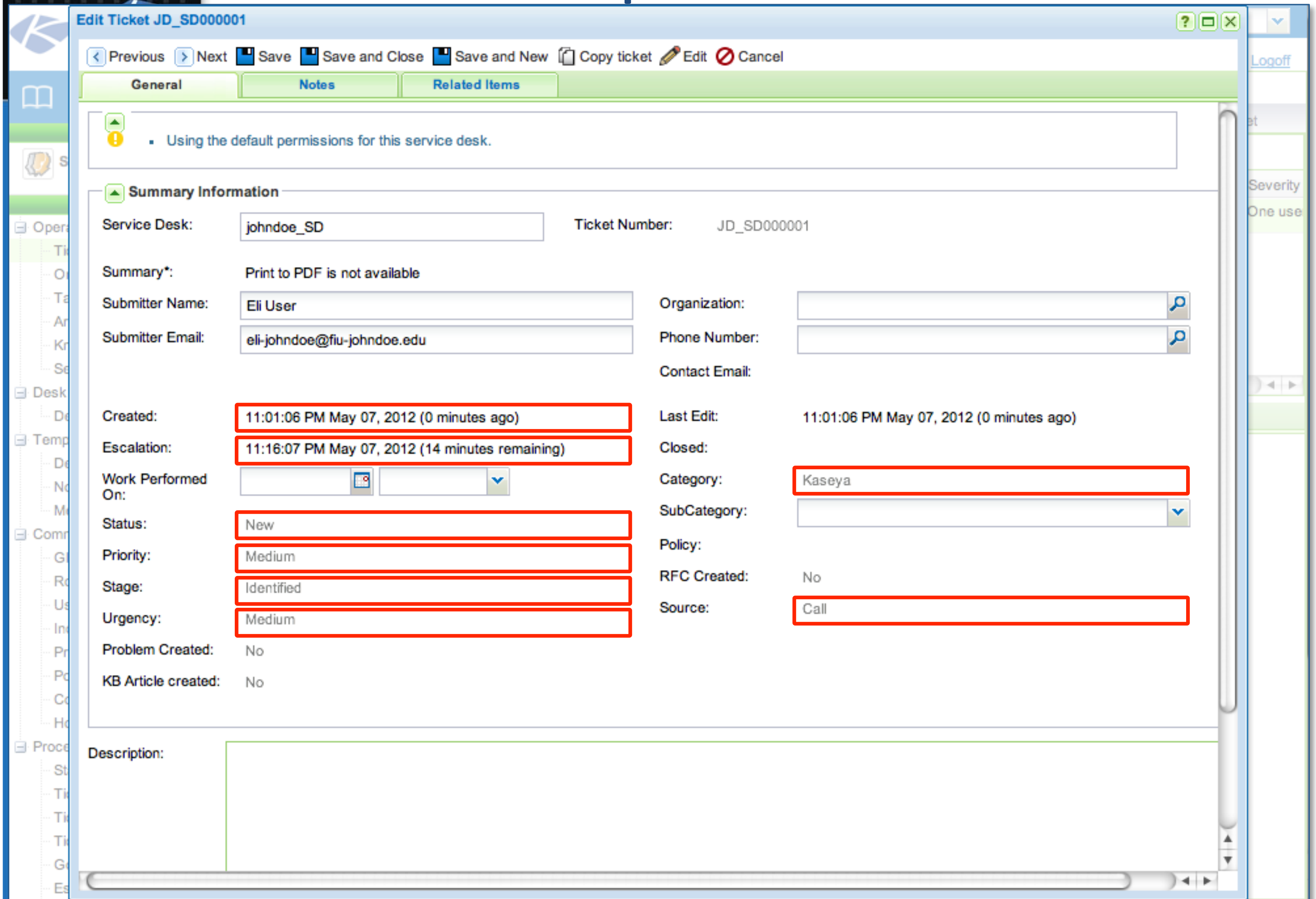
- A *Change* procedure runs when a ticket has been modified either by a user or a system process.
  - There is only one Change procedure for a Desk.
  - This procedure can check for different properties of a ticket and act accordingly.

- A *Goal* procedure runs after a specified time period.
  - The ticket goal sets the *due date* for the entire ticket. The ticket editor displays the ticket due date.
  - The ticket due date can be set using the *Set Ticket Goal Time* command in a procedure.
  - Ticket goal times can be paused and resumed using the *Pause Ticket Goal* and *Resume Ticket Goal* commands in a procedure.

Creating the First Ticket

- Creating a ticket without any changes to the Desk.
- Some observations of the ticket properties
  - has a **New** *Status*
  - is in the **Identified** *Stage*
  - has a **Medium** *Priority*
  - is categorized in the **Kaseya** *Category*
  - is assigned to the **Tier1Support** *Assignee*
  - is owned by **<USERNAME>** *Owner*
  - is due in 1 day; will be escalated in 15 minutes
  - its goal time for this stage is set to two days
  - has a **Medium** *Urgency*
  - its *Source* is set to **Call**

Default Properties of the Ticket

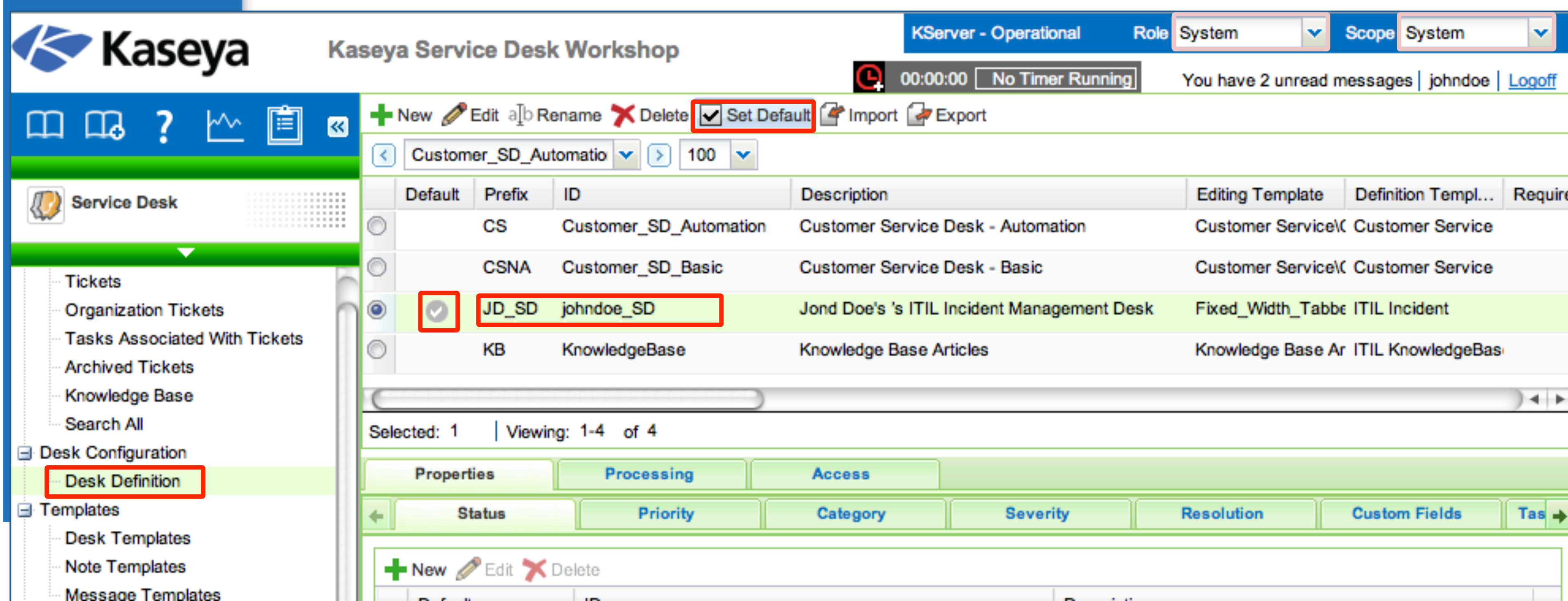


Additional Observations

- Have you noticed that your newly created desk is not the default desk.
- To customize this desk to your liking, you would need to make some changes.
- There are default privileges that are set in regards to the editing template and ticket field access.

Making Your Desk Default

1. Go to *Desk Configuration > Desk Definition*.
2. Select the **<USERNAME>_SD** desk by clicking anywhere on the desk row or the radio button on its left in the upper-right pane.
3. Click on the *Set Default* button on the top row of the upper-right pane.
4. Verify that the **<USERNAME>_SD** desk is selected as the default desk by making sure that the checkmark sign appears in the *Default* column of your desk row.



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Service Desk Lab

Part 3

Review the Desk Fields/Properties

Service Desk Creation Checklist

- ✓ Check your licenses for desks and users
- ✓ Define your desk using a desk template
- ✓ Review the service desk fields/properties
- Review the service desk stages/workflow
- Define a default policy with coverage hours
- Review message templates
- Review procedure variables
- Setup an email reader
- Activate the new desk

Properties and Example Values

- Review these fields closely for your Desk configuration
  - **Status**: Open, Closed, On Hold, etc.
  - **Priority**: High, Normal, Low, etc.
  - **Category**: Hardware, Software, etc.
  - **Severity**: All Computers, One Computer,etc.
  - **Resolution**: Hardware Replaced, etc.
  - **Custom Fields**: Source, Product, etc.

Review Desk Fields

- Use the field values to drive the ticket workflow.
  - Field Values define how the Procedures are going to process the tickets in the specific Stage.
- Choose the fields that you feel are necessary to provide information to work a ticket.
- Focusing on **Status**, **Category**, and **Custom fields**.

NOTE: Be aware of your end user experience when they are creating tickets. What information are you requiring of them to fill out a ticket.

Note

- The *Closed* status of desks should not be deleted.
- The *Closed* status that the system brings is used to properly calculate tickets in the Statistics graph.
- The *Statistics* graph is located in the *Service Desk > Tickets* page on the top menu; look for a button called “Statistics”.

Adjusting the Categories

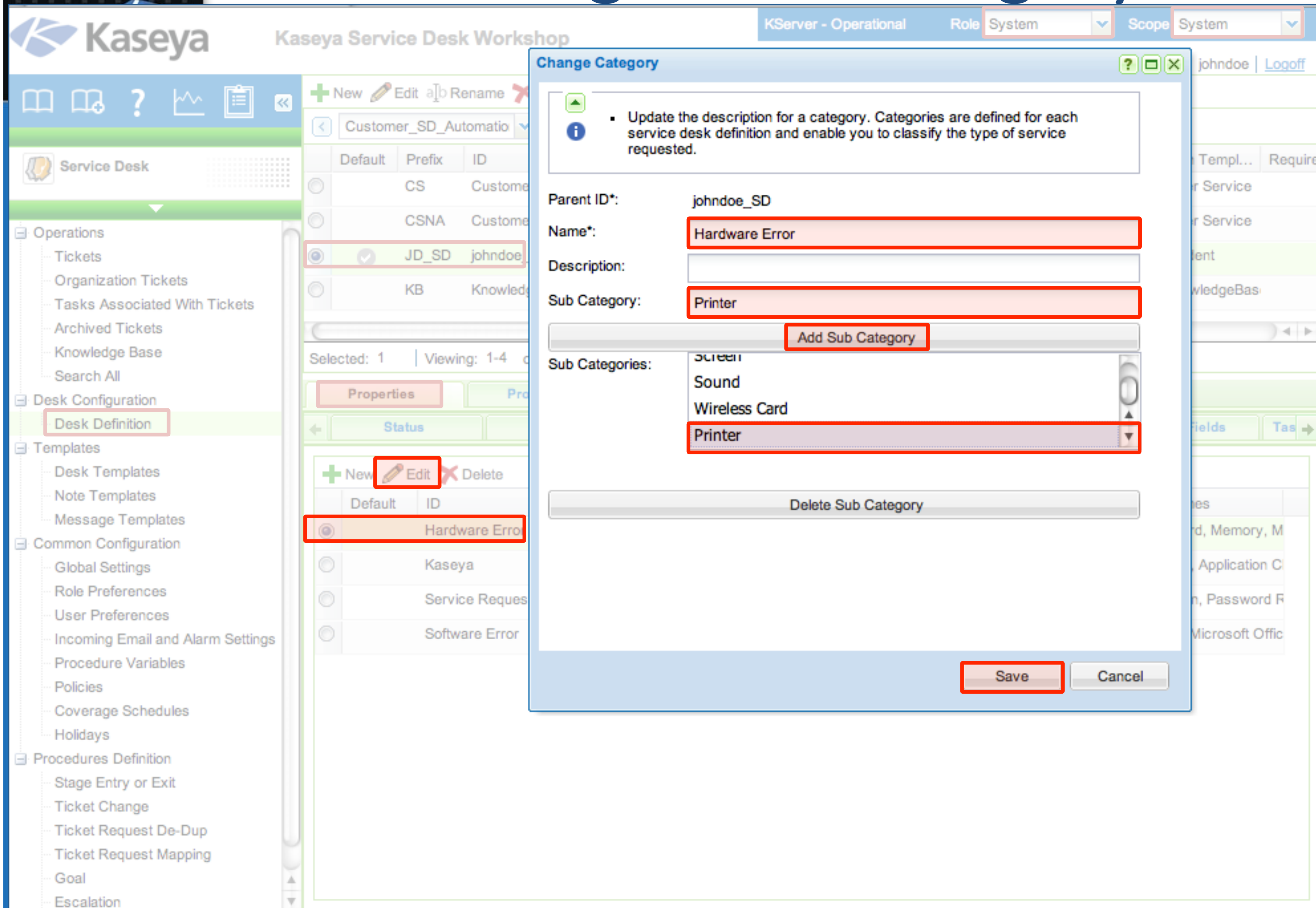
- After reviewing, you realize that
  - **Printer** is missing from **Hardware Error.**
  - The **Sales Related** sub-category in **Service Request** is irrelevant to your desk
  - The **Request new PC** sub-category should not be under the **Service Request** category.
  - A category for **Purchase** 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**.

Adding a Sub-Category

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

2. Select the *Hardware Error* category and click on the *Edit* button in the lower-right pane.
3. Type **Printer** in the *Sub Category* textbox.
4. Click on the *Add Sub Category* button.
5. Click on the *Save* button.

Adding a Sub-Category



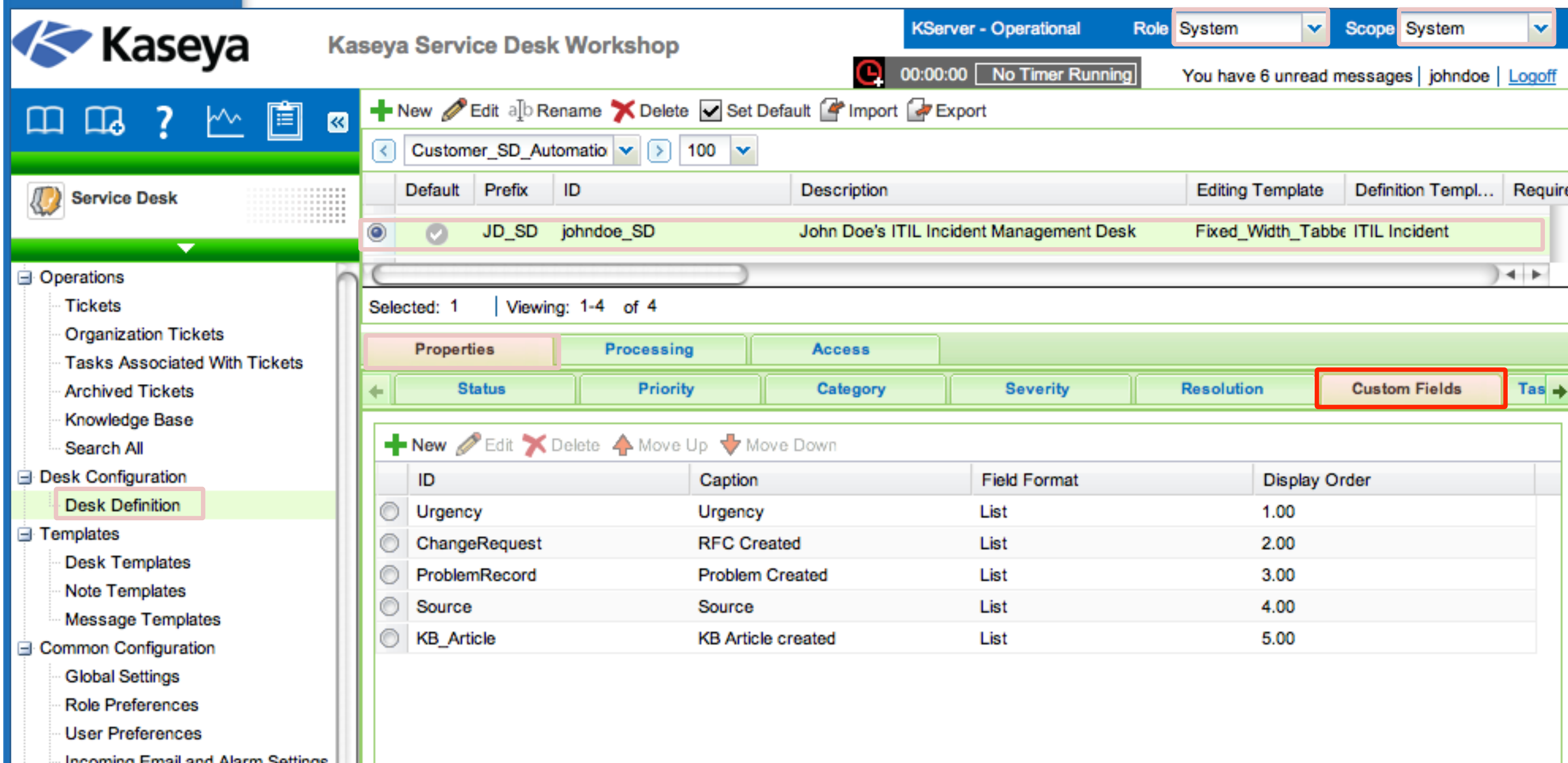
Default Category

- You realize that there is no default category and sub-category.
- You are puzzled, why the ticket that you created is categorized in the **Kaseya** category.
- To be able to figure this out, you would need to learn more about the rest of the settings in your service desk and understand how the automation works.
- We will revisit this issue when the time is right.

Reviewing the Custom Fields

Next, you check the custom fields.

1. Go to the *Properties* > *Custom Fields* tab by clicking on the corresponding tabs in that order in the lower-right pane.



Reviewing the Custom Fields

- Using this tab, you can add custom fields to your desk definition.
- When a ticket is created, these custom fields are available for data entry.
- A corresponding property variable is also created for each custom field you define.
- You can change the display order of the custom fields in the ticket editor by using the *Move Up* and *Move Down* buttons.

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Part 4

Review the Desk Stages/Workflow

Service Desk Creation Checklist

- ✓ Check your licenses for desks and users
- ✓ Define your desk using a desk template
- ✓ Review the service desk fields/properties
- ✓ Review the service desk stages/workflow
- Define a default policy with coverage hours
- Review message templates
- Review procedure variables
- Setup an email reader
- Activate the new desk

Definitions

- **Workflow** is a directed graph, consisting of a sequence of connected stages, capturing the current state of the tickets and what needs to be performed on the tickets next.
- **Stage** is defined as a *Begin* stage, an *End* stage, or a *Middle* stage. A Desk can only have one *Begin* and one *End* Stage

Stage Procedures

- Each Stage has procedures that perform the automation. They perform conditional evaluation of ticket field property values.
- These procedures are triggered by
  - Ticket enters a stage.
  - Ticket exits a stage
  - Ticket exceeds the stage escalation time.
  - Ticket exceeds the stage goal time.

Note: Ticket Change and Ticket Goal procedures are global and defined in the Desk Definition.

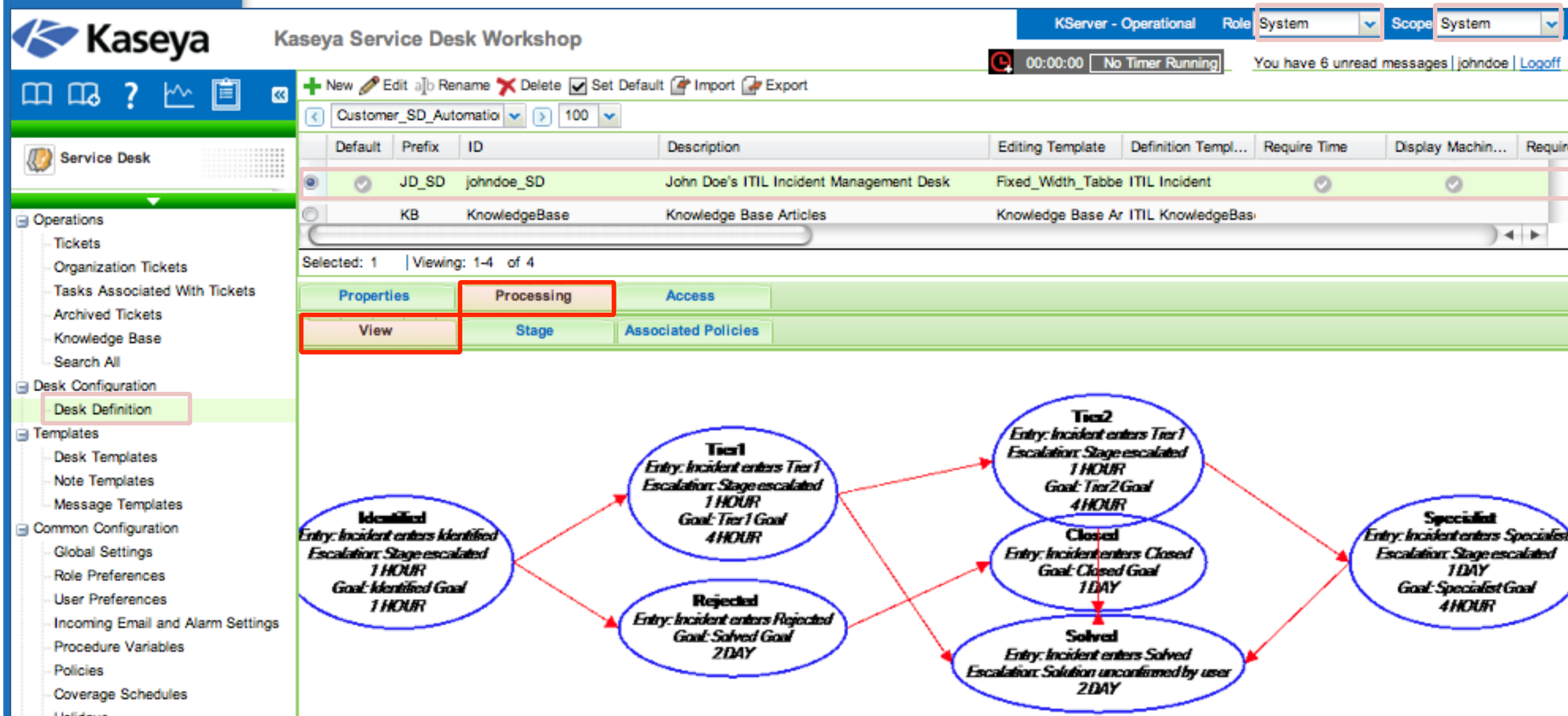
Reviewing the Workflow

- At least one stage is defined as a **Begin** stage and at least one stage is defined as an **End** stage.
- There are usually several **Middle** stages, depending on how sophisticated your desk is.
- The sequence of stages is user-defined. It depends on the policies defined by your organization and your judgment.

Reviewing the Workflow

To review the stages and their transitions, go to *Processing* > *View* tab.

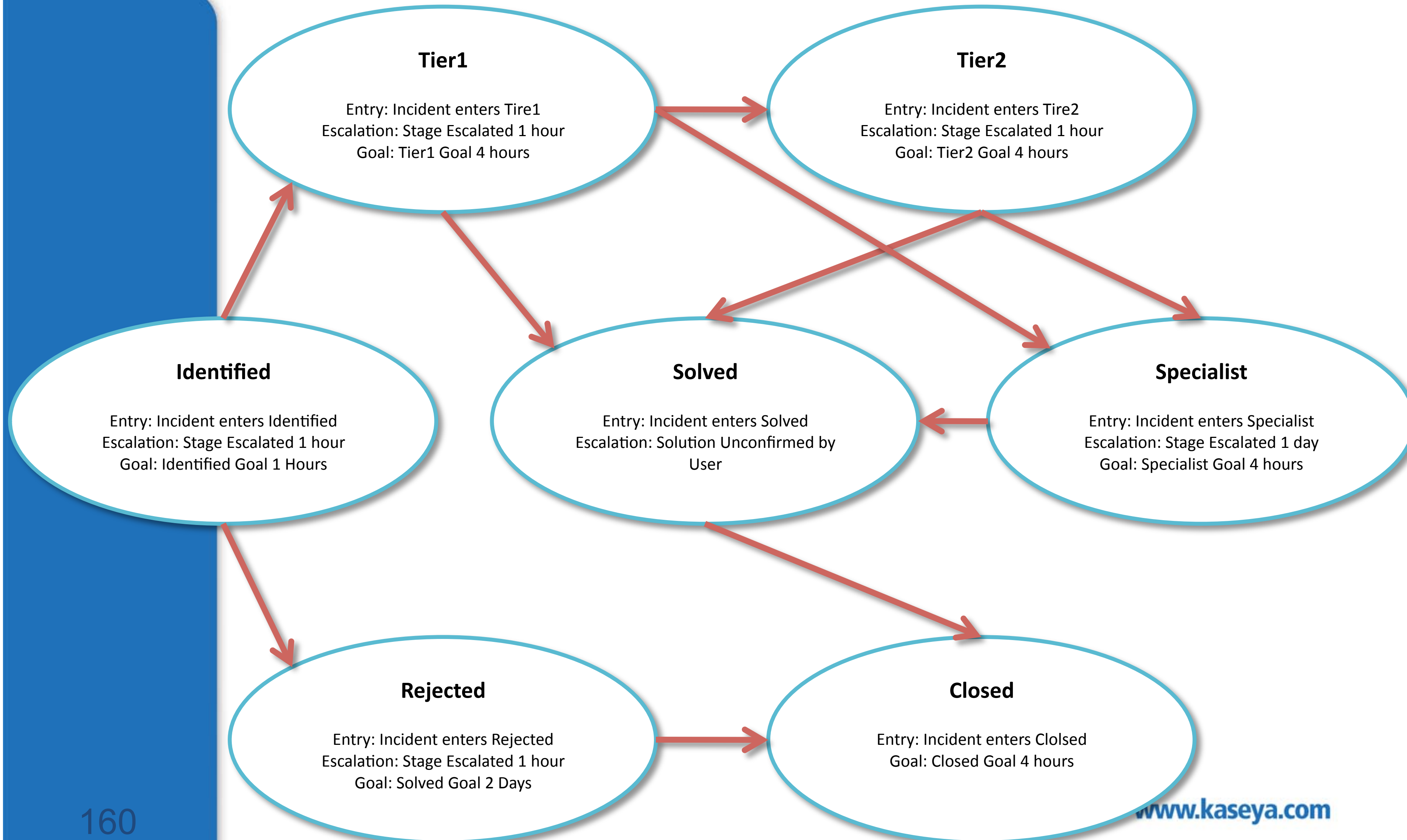
1. Go to *Desk Configuration* > *Desk Definition*.
2. Go to the *Processing* > *View* tab by clicking on the corresponding tabs in that order in the lower-right pane.



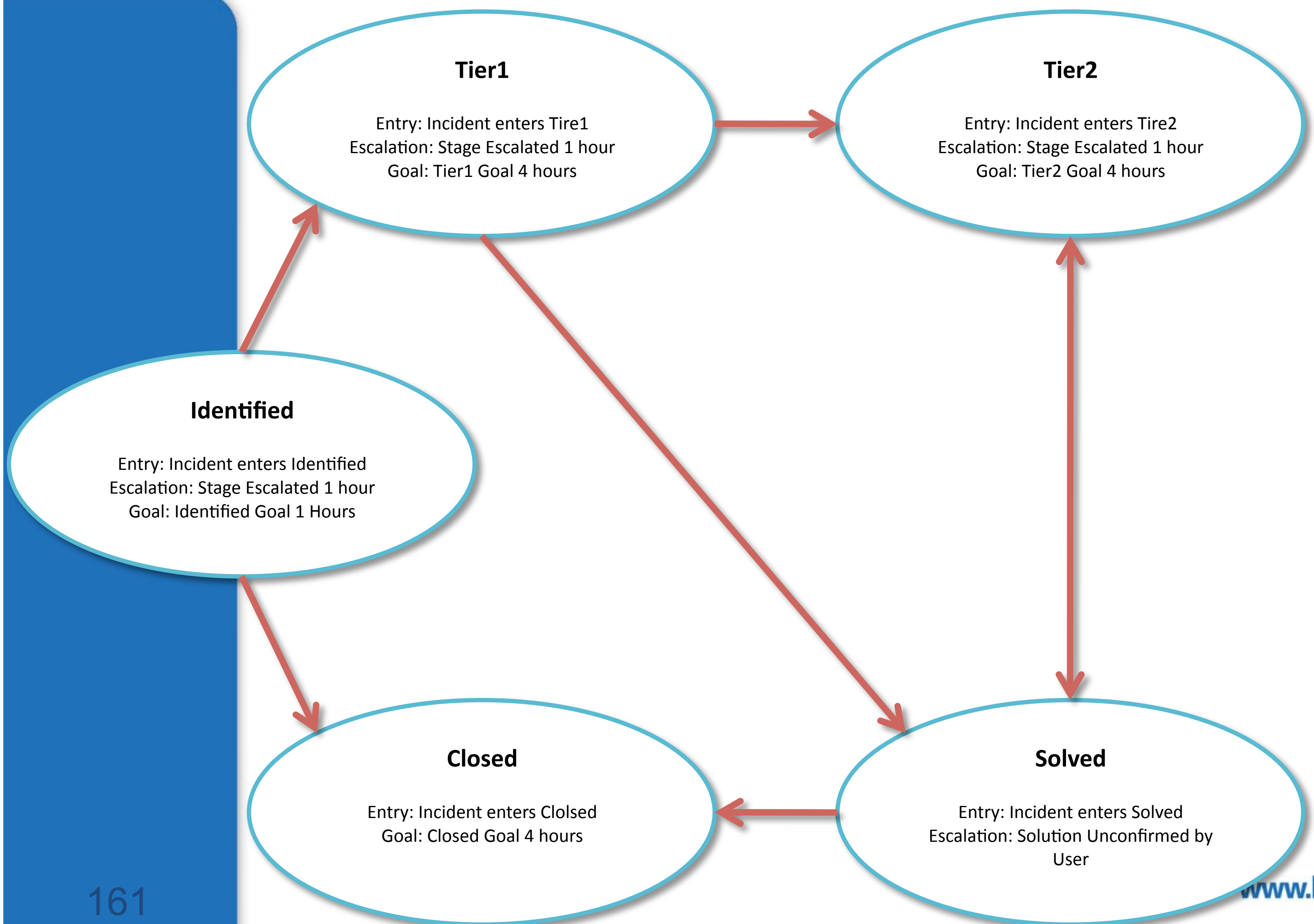
Reviewing the Workflow

- Reviewing the workflow, you notice that there are seven stages, namely, **Identified**, **Tier1**, **Tier2**, **Specialist**, **Rejected**, **Solved**, and **Closed**.
- Note that 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.

Adjusting the Desk Workflow



Workflow in Your Desk



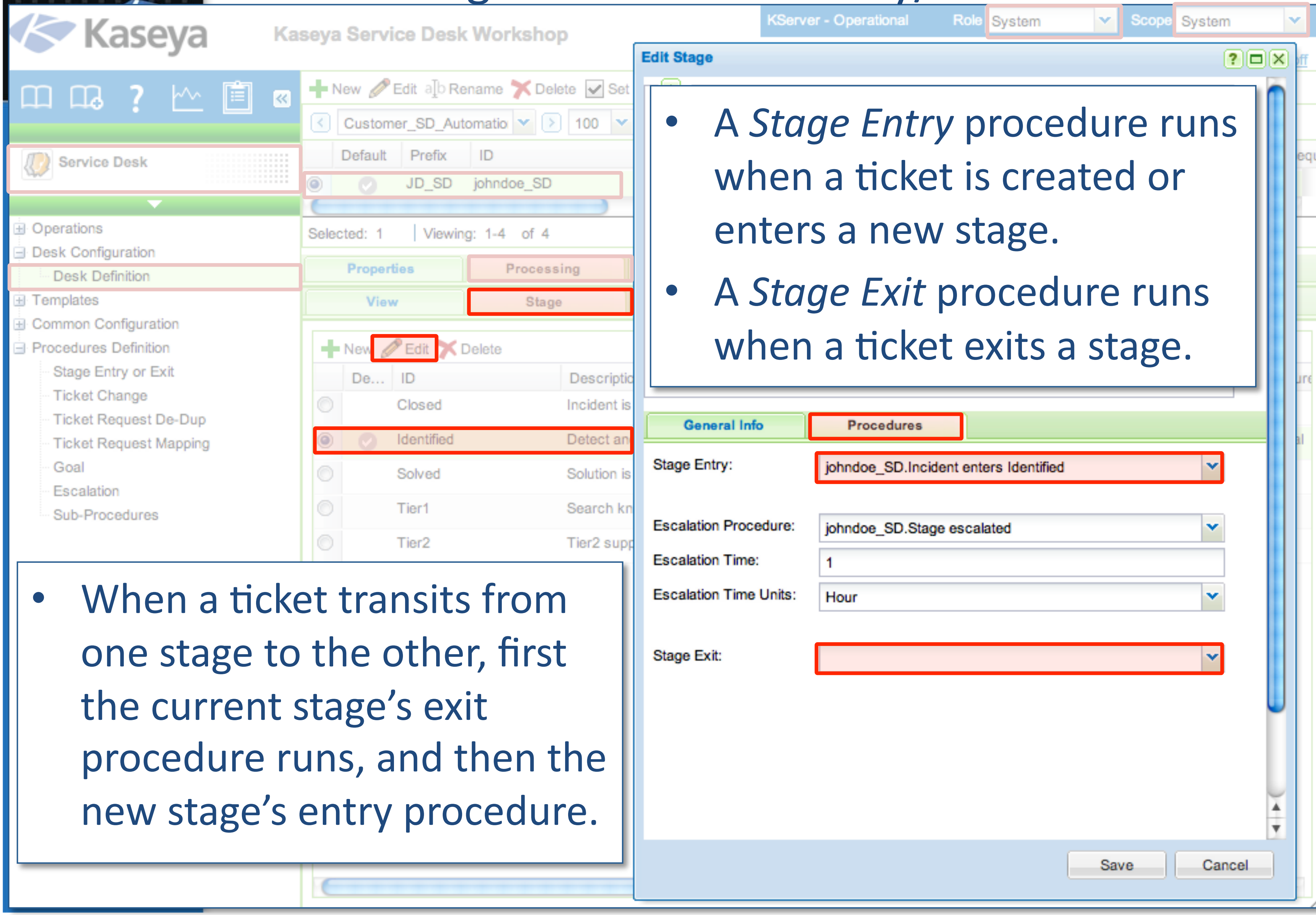
Note

- 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.
- If deleting a *Begin* or *End* stage, please make sure to define another stage for *Begin* or *End.*

Reviewing the Stage Procedures

- ✓ Stage Entry Procedure
- ✓ Stage Exit Procedure
- Stage Escalation Procedure
- Stage Goal Procedure

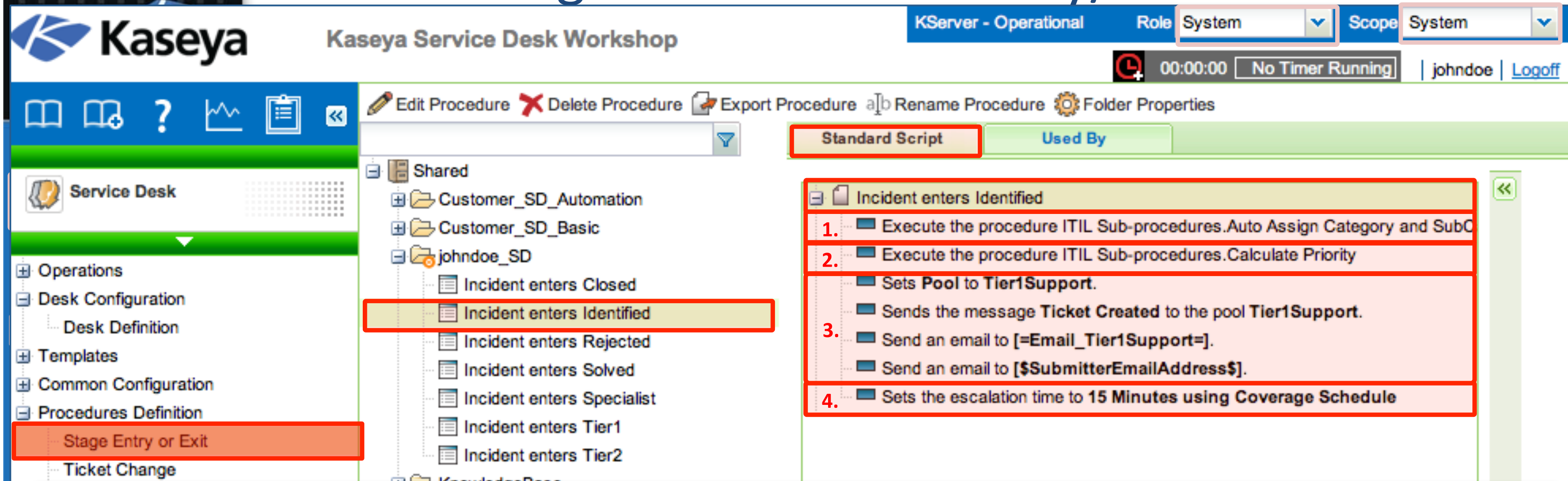
Reviewing the **Identified** Entry/Exit Procedures



- A *Stage Entry* procedure runs when a ticket is created or enters a new stage.
- A *Stage Exit* procedure runs when a ticket exits a stage.

- When a ticket transits from one stage to the other, first the current stage's exit procedure runs, and then the new stage's entry procedure.

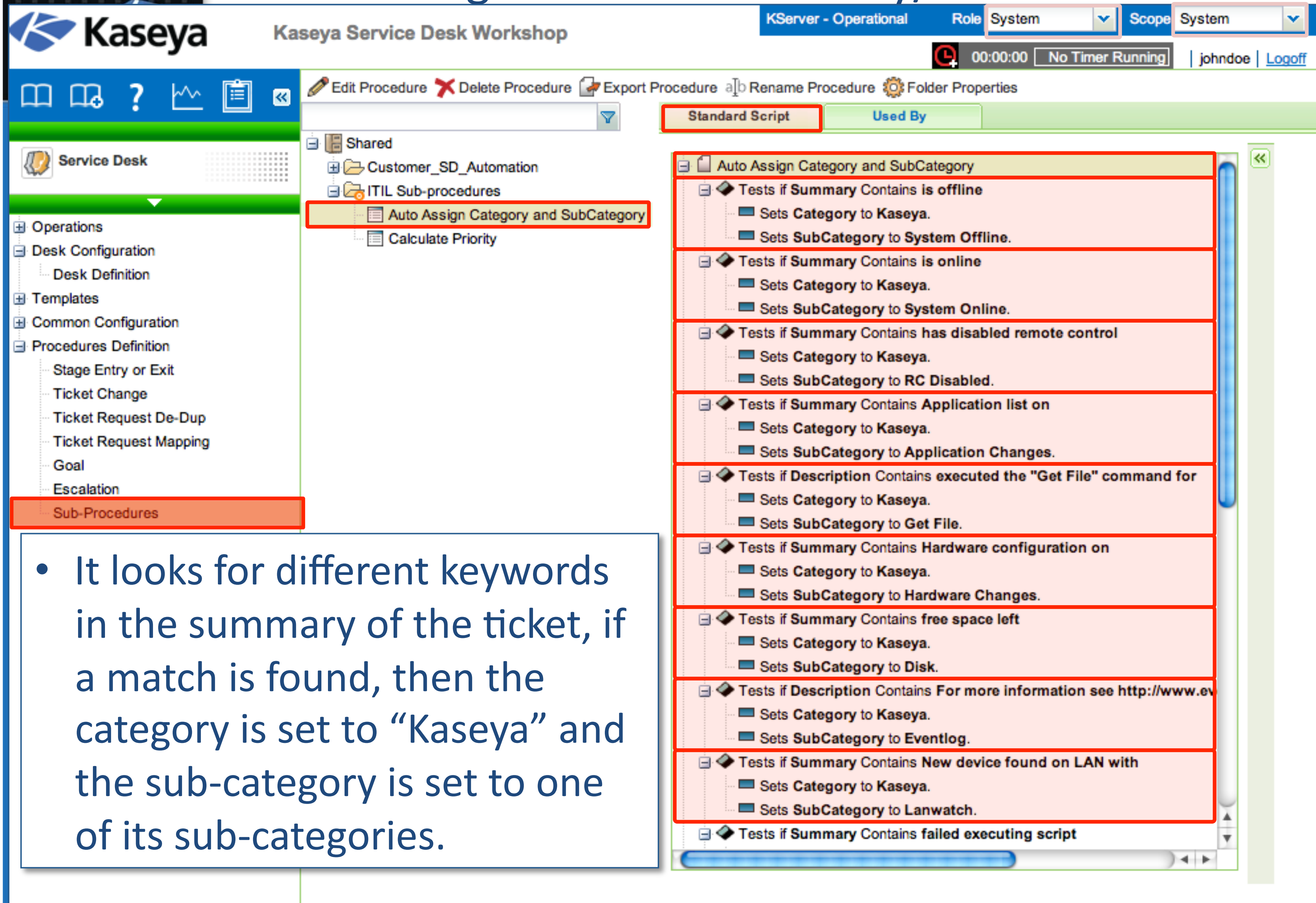
Reviewing the **Identified** Entry/Exit Procedures



- **Incident enters Identified**

1. Sets category and subcategory.
   - A sub-procedure, *Auto Assign Category and SubCategory*, is called and needs to be reviewed.
2. Sets the priority.
   - A sub-procedure, *Calculate Priority*, is called and needs to be reviewed.
3. Notifies the submitter and tier1 team.
4. Sets the escalation time to 15 minutes.

Reviewing the **Identified** Entry/Exit Procedures



- It looks for different keywords in the summary of the ticket, if a match is found, then the category is set to “Kaseya” and the sub-category is set to one of its sub-categories.

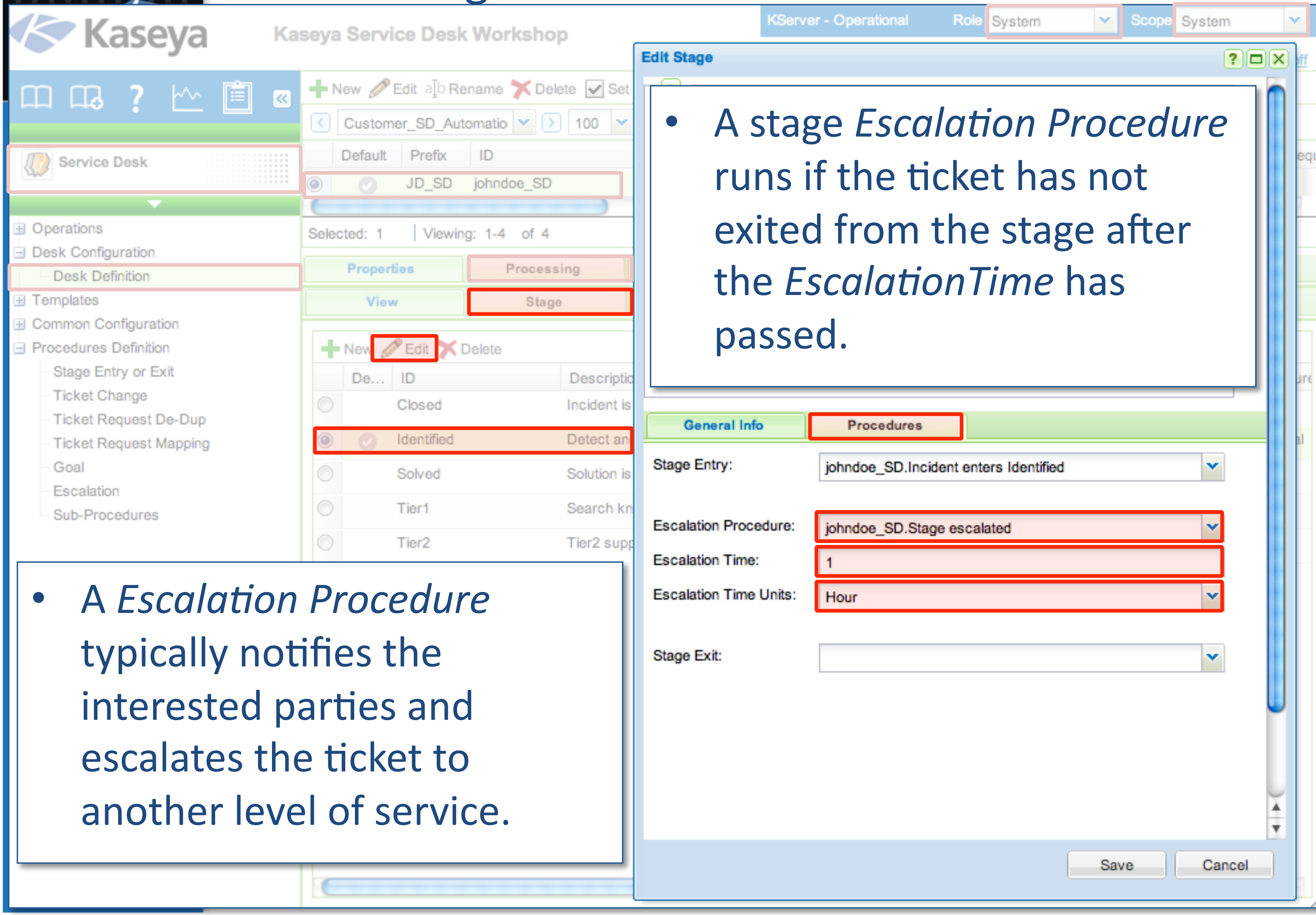
Note

- Sequencing of Procedures
  - If you change the stage of a ticket manually, the stage *Exist* procedure runs first, then the stage *Entry* procedure for the new stage runs second, then the ticket *Change* procedure runs third.
  - If you set a ticket to a stage during a procedure, the procedure waits while the stage *Exit* procedure for the current stage runs, then waits while the stage *Entry* procedure for the new stage runs, then resumes running the rest of the procedure from that point.

Reviewing the Stage Procedures

- ✓ Stage Entry Procedure
- ✓ Stage Exit Procedure
- ✓ Stage Escalation Procedure
- Stage Goal Procedure

Reviewing the **Identified** Escalation Procedures



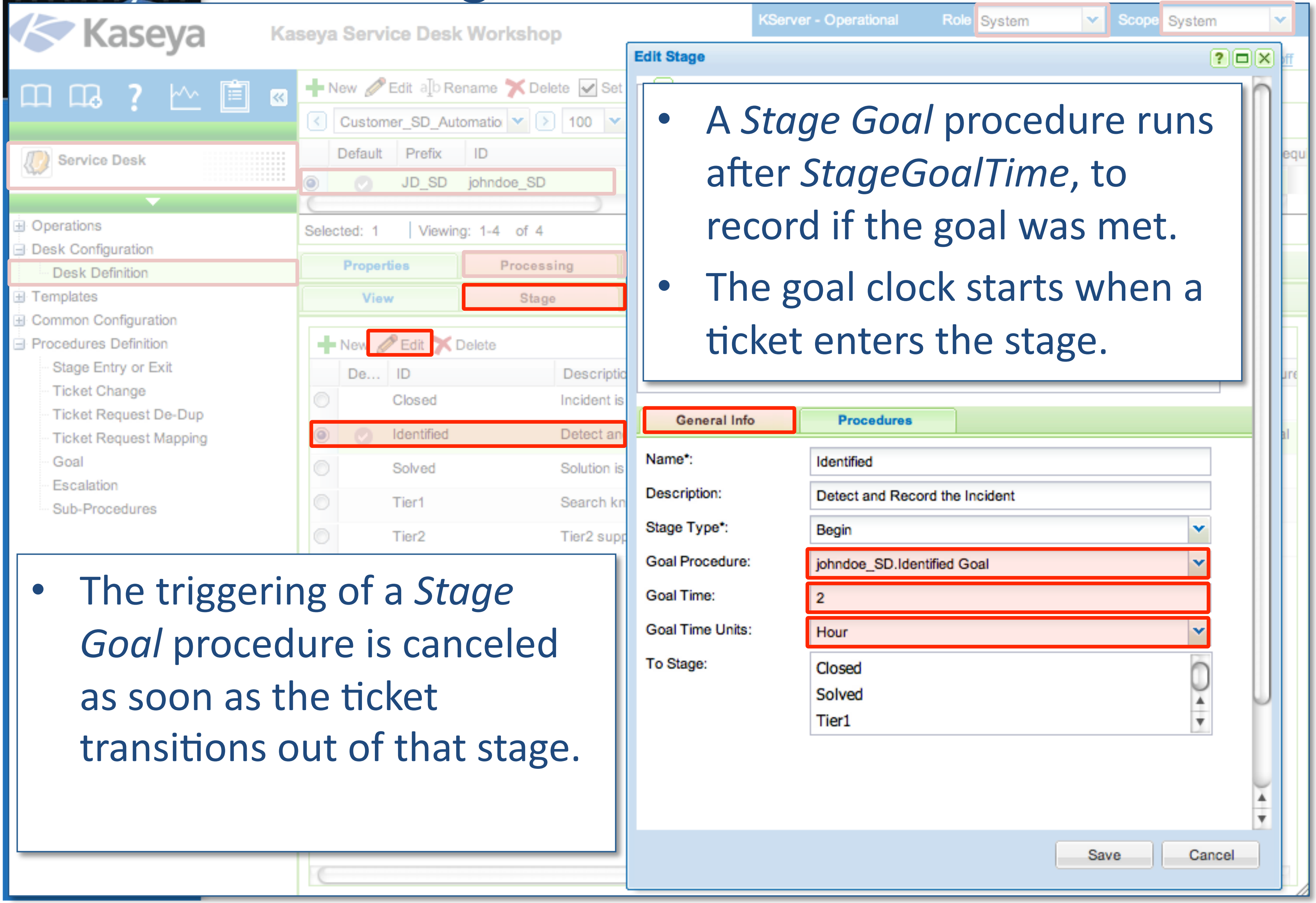
- A stage *Escalation Procedure* runs if the ticket has not exited from the stage after the *EscalationTime* has passed.

- A *Escalation Procedure* typically notifies the interested parties and escalates the ticket to another level of service.

Reviewing the Stage Procedures

- ✓ Stage Entry Procedure
- ✓ Stage Exit Procedure
- ✓ Stage Escalation Procedure
- ✓ Stage Goal Procedure

Reviewing the **Identified** Goal Procedure



- A *Stage Goal* procedure runs after *StageGoalTime*, to record if the goal was met.
- The goal clock starts when a ticket enters the stage.

- The triggering of a *Stage Goal* procedure is canceled as soon as the ticket transitions out of that stage.

Note

- The goal time for a stage can be set using the *Set Goal Time* command.
- Stage goal times can be paused and resumed using the *Pause Stage Goal* and *Resume Stage Goal* commands.
- Unlike escalations, goal "levels" do not exist. There is only one for each stage.

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Part 5

Define a Default Policy with Coverage Hours

Service Desk Creation Checklist

- ✓ Check your licenses for desks and users
- ✓ Define your desk using a desk template
- ✓ Review the service desk fields/properties
- ✓ Review the service desk stages/workflow
- ✓ Define a default policy with coverage hours
- Review message templates
- Review procedure variables
- Setup an email reader
- Activate the new desk

Policies and Coverage Schedule

- Policies regulate
  - hours of operation and holidays
  - value of procedure variables
- Coverage Schedule defines the hours of coverage for each Policy.
- Policies are assigned to a ticket as each ticket is created, based on
  - organization
  - organization type
  - machine group

Note

- When you define a coverage schedule, make sure that your schedule explicitly indicates what hours are covered and what hours are not covered.
- For example, if your desk only covers M:F, then you also need to add the weekends and check No Coverage and select the time zone. Also define No Coverage for the Default Holidays.

Note

- You can change the default values for your desk's standard fields by going to navigating to *Service Desk > Desk Definition*, then choosing your service desk on the upper right pane, clicking on *Edit* and select the *Standard Field Defaults* tab.
- The standard field are *Status, Priority, Category, Severity, Resolution, Policy, and Email*.

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Part 6

Message Templates & Procedure Variables

Service Desk Creation Checklist

✓ Check your licenses for desks and users

✓ Define your desk using a desk template

✓ Review the service desk fields/properties

✓ Review the service desk stages/workflow

✓ Define a default policy with coverage hours

✓ Review message templates

✓ Review procedure variables

- Setup an email reader
- Activate the new desk

Message Templates

- Message templates are reusable, standard messages you can send as emails or display as messages in the *Inbox* of other users.
- Message templates can be selected when you specify a *Send Email* step or *Send Message* step within any service desk procedure.
- Message templates can also include ticket property variables and procedure variables.

Note

- Any user name included in the *To* field of a message template is automatically converted into that user's corresponding email address.
- For example, if the user *johndoe* has a corresponding email address of *johndoe-fiu@live.com*, then the same message template—with *johndoe* in the To field—can be used by a *Send Message* step to send a message to *johndoe* and also used by a *Send Email* step.

Procedure Variable

- Procedure variables are variables used in service desk procedures.
- The default value set for a procedure variable can be superseded by the default value for a policy variable.

Note

- Procedure variables can be nested inside of other procedure variables.
- For example, the procedure variable *[=Email_ReviewTeam=]* is entered as the value of many pre-defined procedure variables.
- You need only change the default value of the *Email_ReviewTeam* procedure variable to any valid set of email addresses to update all the other procedure variables that use it.

What needs to be fixed?

- Add *~ticid* to the *Subject* and replace *[$Submitter_Name$]* with "*Sincerely,*" in the *Ticket Creation Acknowledgement* message template .
- Set the value of the following procedure variables as indicated below:
  - *[=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.

Note

- *<YOURSUPPORTEMAIL>* would need to be created by you for the purpose of this training.
- If you have a support email already, you can use it instead.
  - You need to make sure that it support POP or IMAP, as we later need to setup an email reader for your desk.
  - You need to make sure that you clean up your service desk before the end of your program to avoid any conflicts with you real email readers.

Recommendations

- We strongly recommend that you do NOT use your personal/work emails for this training.
- The main reason is that you may receive a high volume of notification and acknowledgement emails and you do not want your mailboxes to become flooded because of this training program.
- We suggest that you use free email services such as live.com and create two email accounts, one for sending emails (*e.g., <USERNAME>-fiu@live.com*) and the other one for receiving emails (e.g., *support-<USERNAME>@live.com*).
- Later, you will lean how to fake the other emails.

Verifying Your Changes

- 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.

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Service Desk Lab

Part 7

Setup an Email Reader

Service Desk Creation Checklist

- ✓ Check your licenses for desks and users
- ✓ Define your desk using a desk template
- ✓ Review the service desk fields/properties
- ✓ Review the service desk stages/workflow
- ✓ Define a default policy with coverage hours
- ✓ Review message templates
- ✓ Review procedure variables
- ✓ Setup an email reader
- Activate the new desk

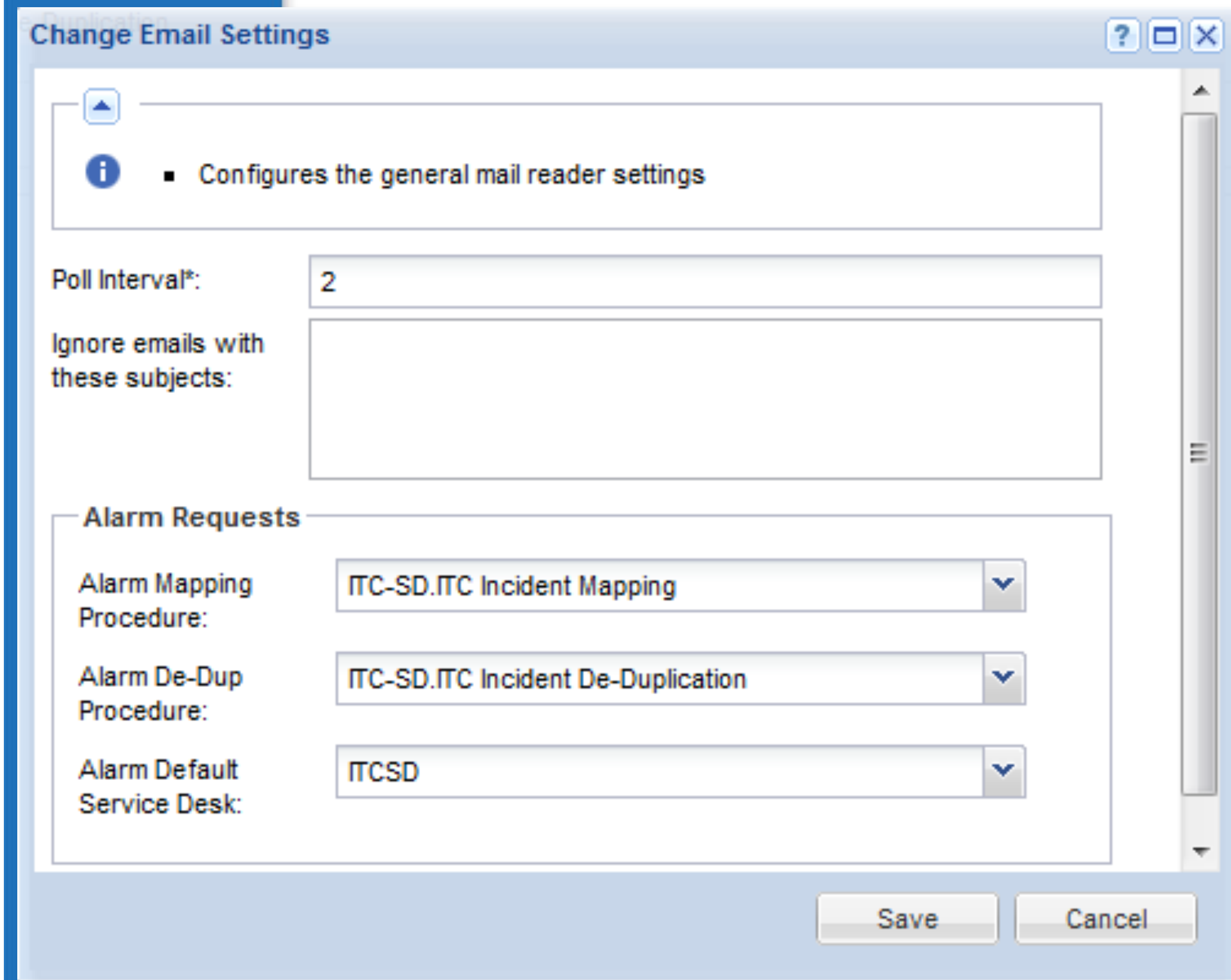
Email Reader

- You can receive request via emails.
- Ticket requests can be created from either inbound emails or system events, such as alarm conditions.
- 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.

Email Reader

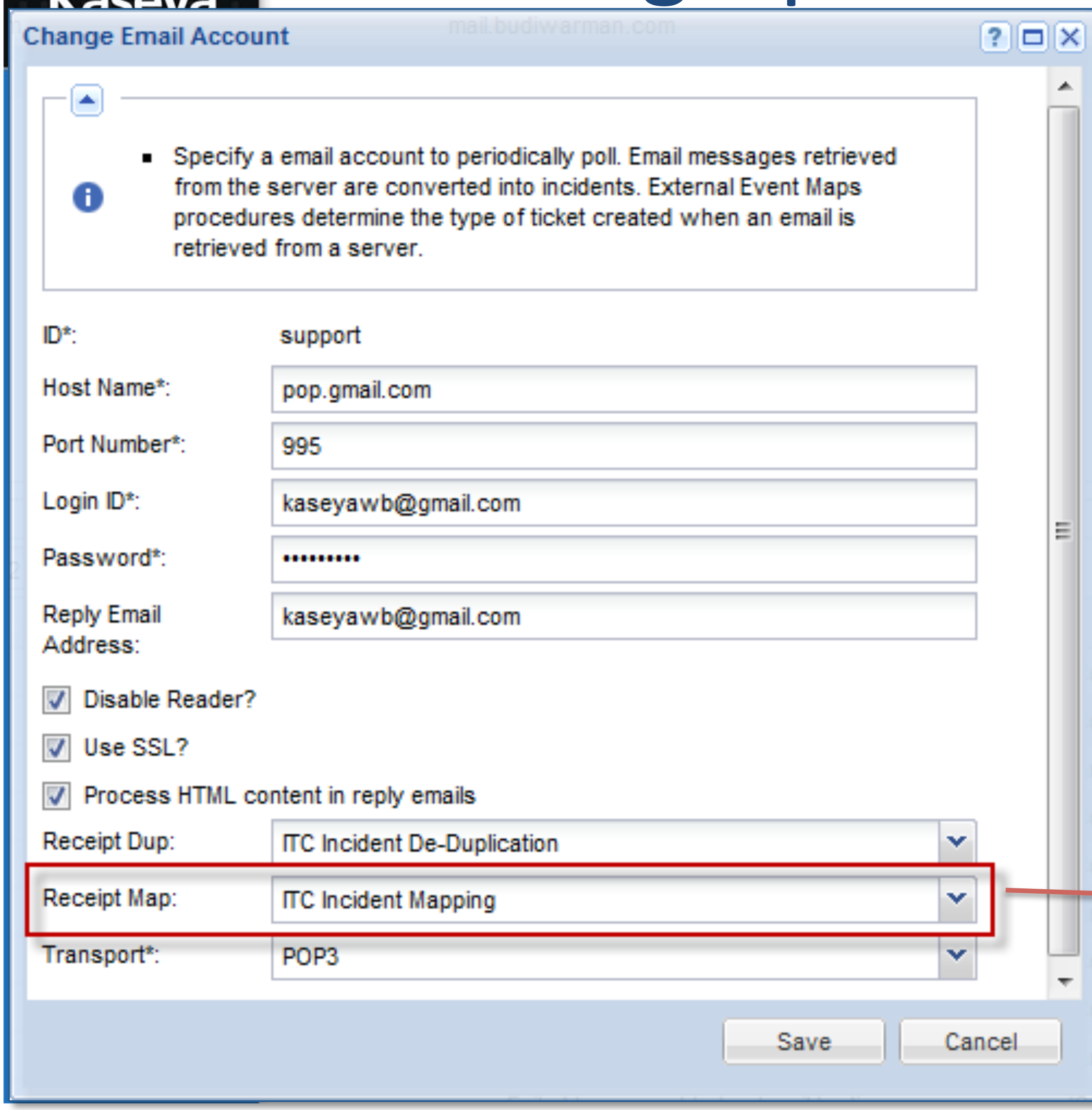
- An email reader acts as a communication hub between end user and your support team.
- It supports both POP3 and IMAP.
- It can receive plain or HTML formatted email, with or without attachments, and add the contents to the ticketing system.
- RTF formatted emails are not supported.

Setting Up an Email Reader

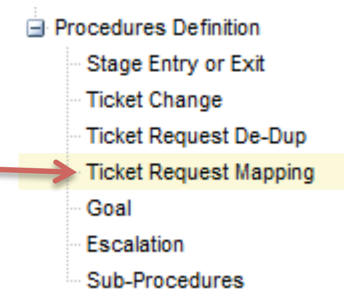


- Service Desk will check a POP3 or IMAP mailbox for ticket requests and communications.
- General Email Reader tab configure which desk Alarm will be mapped to.

Setting Up an Email Reader



- Email Account Configuration
- Receipt Map
  - Procedure that determines which Desk the email received will be sent to.



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Note

- If you do not use a ticket mapping procedure, then you must make sure that you have set a “default desk” in the *Service Desk > Desk Definition* page by choosing the default desk and clicking on “Set Default” on the top menu.

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How the Emails are Processed?

- The *Receipt Map* procedure decides which desk tickets will be created in.
- Review the corresponding *Ticket Request Mapping* procedure to see where the ticket will be delivered to.
- Once the newly created ticket is delivered to a desk, it enters its Beginning stage
  - For example, if the desk is *<USERNAME>_SD*, the ticket enters the *Identified* stage.
  - Review *Incident enters Identified* procedure on the *Stage Entry or Exit* procedure page.

Populating Ticket Fields Using Tags

- The following tags can be included in either the subject or the body of the email. Note that tags are case-insensitive.

- Tags for existing tickets only
  - ~ticid='xxx' - Appends the body of the email to an existing ticket.
- Tags for both new and existing tickets
  - ~hide - Makes the note a hidden note. The ~hide tag itself is removed.

Populating Ticket Fields Using Tags

- New Tickets Only
  - ~username='xxx' - Automatically inserts the value given as xxx into the Submitter Name field. If ~username='xxx' is not included in the either the subject or the body of the email, then the email sender's *From* address is used to populate the Submitter Name field.
  - ~useremail='xxx' - Automatically inserts the value given as xxx into the *Submitter Email* field.
  - ~assignee='xxx' - Assigns the ticket created to a specific user. The user must exist.

Populating Ticket Fields Using Tags

- New Tickets Only
  - ~machineid='xxx.xxx' - Assigns the ticket created to a machine ID. The machine ID must exist.
  - ~machinegroup='xxx.xxx' - Assigns the ticket created to a machine ID. The machine ID must exist.
  - ~organization='xxx' - Assigns the ticket created to an organization by orgID. The orgID must exist.
  - ~category='xxx' - Assigns the ticket created to a specific category. The category must exist.

Populating Ticket Fields Using Tags

- New Tickets Only
  - ~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.
  - ~severity='xxx' - Assigns the ticket created to a specific severity. The severity must exist.
  - ~solutiontype ='xxx' - Assigns the ticket created to a resolution. The resolution must exist.
  - ~customfield=’xxx’ - Assigns the ticket created to the specified value of a custom field ID. The custom field ID must exist.

Using ~ticid

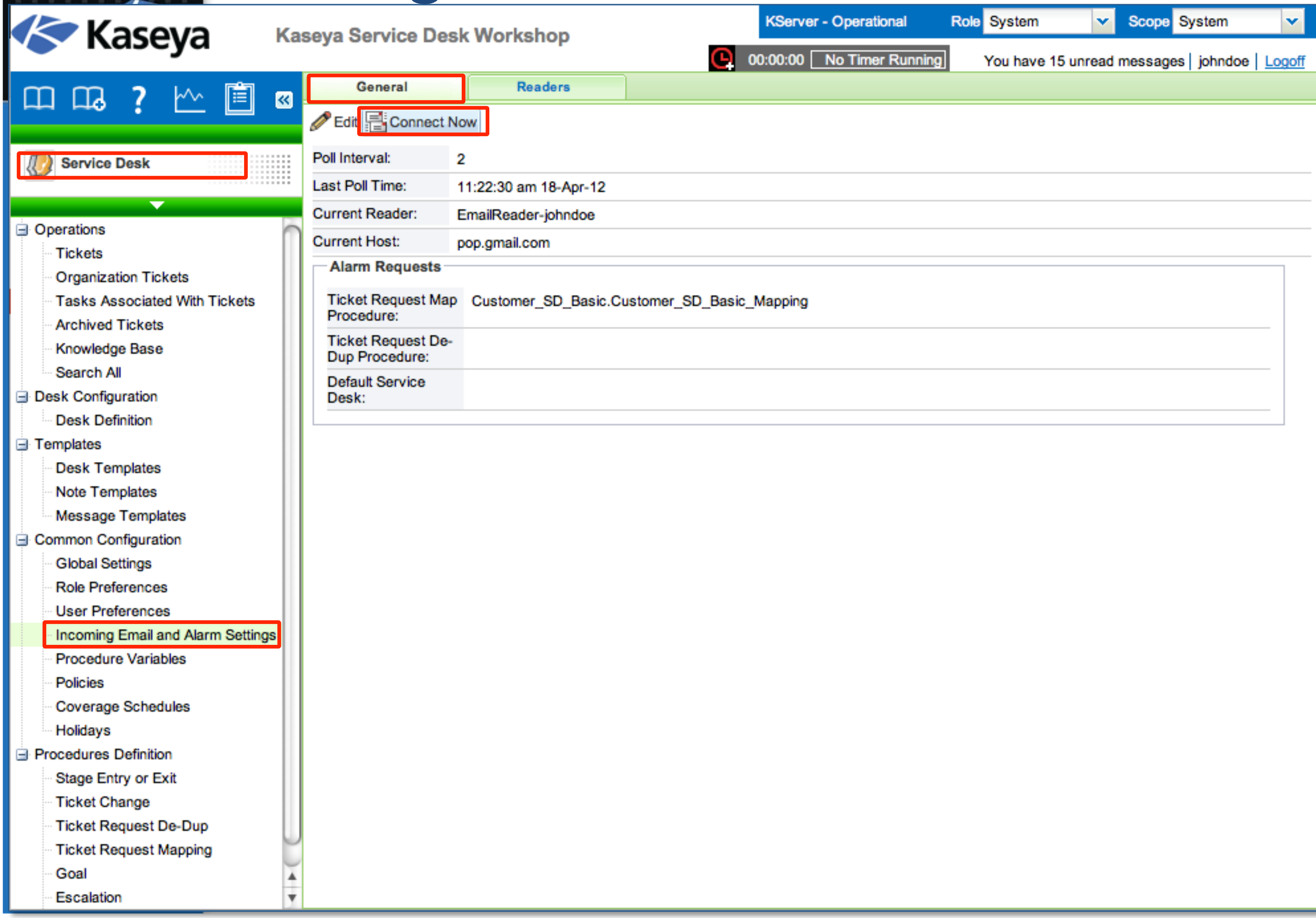
- If email contains ~ticid='…', it will update the existing ticket with the same ticket number.
- Typically, in the subject of the message templates designated to be send to the user/submitter, ~ticid='[$TicketId$]' is appended so that when the user replies, the reply can be linked to the original ticket.

Forcing Email Reader to Check Now

If you are in a hurry to see the outcome of your test, you can manually force the email reader to check the email readers.

1. Go to *Service Desk > Incoming Email and Alarm Settings.*
2. Click on the *Connect Now* button on the top of the right pane.

Forcing Email Readers to Check Now



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Service Desk Lab

Part 8

Activate the New Desk

Service Desk Creation Checklist

- ✓ Check your licenses for desks and users
- ✓ Define your desk using a desk template
- ✓ Review the service desk fields/properties
- ✓ Review the service desk stages/workflow
- ✓ Define a default policy with coverage hours
- ✓ Review message templates
- ✓ Review procedure variables
- ✓ Setup an email reader
- ✓ Activate the new desk

Activation of Service Desk

- Activation of service desk enables system events—such as alarms—to create new tickets in *Service Desk* instead of the legacy *Ticketing* module.
- Activation also causes *Live Connect*, *Portal Access*, *Monitoring* and other pages that show existing tickets to list *Service Desk* tickets instead of *Ticketing* module tickets.
- VSA Modules are either integrated with the *Ticketing* or *Service Desk*, but cannot be integrated with both at the same time.

Activation of Service Desk

- Activation of service desk integration can be done at any time before or after *Service Desk* configuration.
- It is recommended to first finish configuration of your *Service Desk* before activation.

Steps for Activation of Service Desk

1. The Service Desk module must be activated to process ticket requests from system events using *Service Desk > Common Configuration > Global Settings*.
2. *Incoming Email and Alarm Settings* must be enabled.

Note: This step is required only for the on-premise KServers.

Note: No email readers need be defined to create Service Desk tickets from alarms.

Steps for Activation of Service Desk

3. Specify the desk definition used to create the ticket, in any one of the three ways:
   - Set the *Default* desk definition in *Service Desk > Desk Definition*.
   - Set the *Alarm Default Service Desk* in *Incoming Email and Alarm Settings*. Has precedence over the Default desk definition.
   - Specify a unique *Ticket Request De-Dup* or *Ticket Request Mapping* procedure using the *Incoming Email and Alarm Settings*. Has precedence over the *Default* desk definition and the *Alarm Default Service Desk* setting.

Note

- If they are going to be using a *Ticket Request Mapping* procedure for both incoming email and alarms, you must be careful if you plan to set the organization for the incoming emails.
- An alarm request is already mapped to a certain machine ID that must be in its corresponding organization.
- Therefore, if you force to change the org for tickets, the corresponding alarms may not get created because there is a conflict.

Deactivation

- Once activated, *Service Desk* can be deactivated.
- Deactivation redirects *Live Connect*, *Monitoring* and *Alarms* to integrate with the *Ticketing* module instead of the *Service Desk* module.
- Use *Service Desk > Global Settings* to deactivate Service Desk integration.

Disabling the Ticketing Email Reader

- After *Service Desk* activation, the *Ticketing* email reader will still convert inbound emails into *Ticketing* module tickets, so you may want to disable the *Ticketing* email reader manually before *Service Desk* is activated.
- If both the *Ticketing* and *Service Desk* email readers are to be run concurrently, they should poll different email servers.

Note

- The *SD* email reader and *Ticketing* email reader must not run at the same time.
- The reason is that alarm requests will not process through because it will not know if to go to *Ticketing* or *SD* causing them to be stuck in a “Processing” state.

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Part 9

Defining Your Initial Service Desk Users

User Access to Service Desk

- VSA Users vs. Service Desk Users
  - VSA Users logins are able to access Kaseya modules and all of its functionality
- Service Desk Users
  - Configure and manage the Desk / Workflow
  - Service Desk Users can work within Service Desk to manage tickets and document workflow.

Configuring Service Desk Users

Now that your desk is created and activated, it is time to

1. Configure the User Roles
2. Configure the Scopes
3. Configure the Role Preferences
4. Assigned the User Roles and Scope to the appropriate Users

1.1. Defining User Role Types

- **SD Admin** (The IT team leader)
  - Creates and manipulates services desks.
- **SD Technician** (IT employees)
  - Creates and manipulates tickets.
  - Can own a ticket or be a ticket assignee.
  - Cannot create or manipulate service desks.
- **VSA Admin / Basic End User** (Contact - Point of contact for a group of end users)
  - Can view/manipulate tickets on behalf of end users.
  - Cannot own a ticket or be a ticket assignee.
- **Machine User** (Users of computers being managed)
  - Can create tickets, receive notifications, add notes, and view status of the tickets.

1.2. Predefined roles and types

- **User Roles** (define what users can access)
  - **SD Admin**: of type SD Administrators & Technicians
  - **SD User**: of type Service Desk Technician
- **User Role Types** (define the types of user roles)
  - **Service Desk Administrators**: Can define/modify service desks and access all service desk functions.
  - **Service Desk Technicians**: Can be a ticket assignee, view/edit tickets, and run reports, but cannot configure service desks or service desk procedures.
  - **Basic VSA Admin**: Can access VSA core modules, but cannot access service desk by default; you can grant access.
  - **End User:** Can access VSA through the agent. Create and View tickets, but cannot be assigned to a ticket.
- **Machine Roles** (define what machine users can access)
  - **Default**: of type Basic Machine
- **Machine Role Types** (define the types of machine roles)
  - **Basic Machine**: all the machines with an agent have this type.

Configuring User Roles

Here are the steps to configure User Roles for the Desk

1.1. Identify the user roles used for specific Desk access

1.2. Review the predefined user/machine roles and role types;

1.3. Add either, Service Desk Admin or Service Desk Technicians, Role Type to the User Role.

Note: Each Service Desk Admin or Technician will need their respective license. Review the License Manager for their availability.

Kaseya

1.3. Define Your User Roles

- **SD Admin** (The IT team leader)
  - We simply use the predefined *SD Admin* user role.
- **SD Technician** (IT employees)
  - We create the *SD-Technician-<USERNAME>* user role, initially similar to SD User; may change its access later.
- **End User** (Point of contact for a group of end users)
  - Under the Desk – Ticket editing template this End User Type is referred to by the **Contact** Field
  - We create the *Contact-<USERNAME>* user role of type *Basic End User* and later we give it limited access to Service Desk for the contacts to be able to view/edit tickets on behalf of end users.
- **Machine User** (Machine users of computers being managed)
  - We simply use the predefined *default* machine role for the machine users; define them using agent profiles.

Note

- A *Basic End User* role type without using any service desk role type licenses has the ability to view/edit tickets.
- However, a VSA user of type *Basic End User* CANNOT be a ticket assignee.
  - Basic purpose is to be able to work a ticket without taking a Service Desk Technician nor Service Desk Admin license.
  - An example use case for your desk is for the contact users, who may want to view/edit the all the tickets from their org/dept.

2. Define the Scopes

Here are the steps to define SD Scopes

2.1. Define the orgs, machine groups, and departments that you support.

2.2. For each SD user role, create all the appropriate SD scopes based on access to orgs, machine groups, department, etc.

2.3. Assign the Service Desk to the Scope

3. Define the Users

Here are the steps to define Users

3.1. Assign the appropriate User Roles under the System

3.2. Assign the appropriate Scope under the System

3.3. Under *Service Desk - Role Preferences*, for each User Role there should be an assigned Service Desk and the field permissions configured.

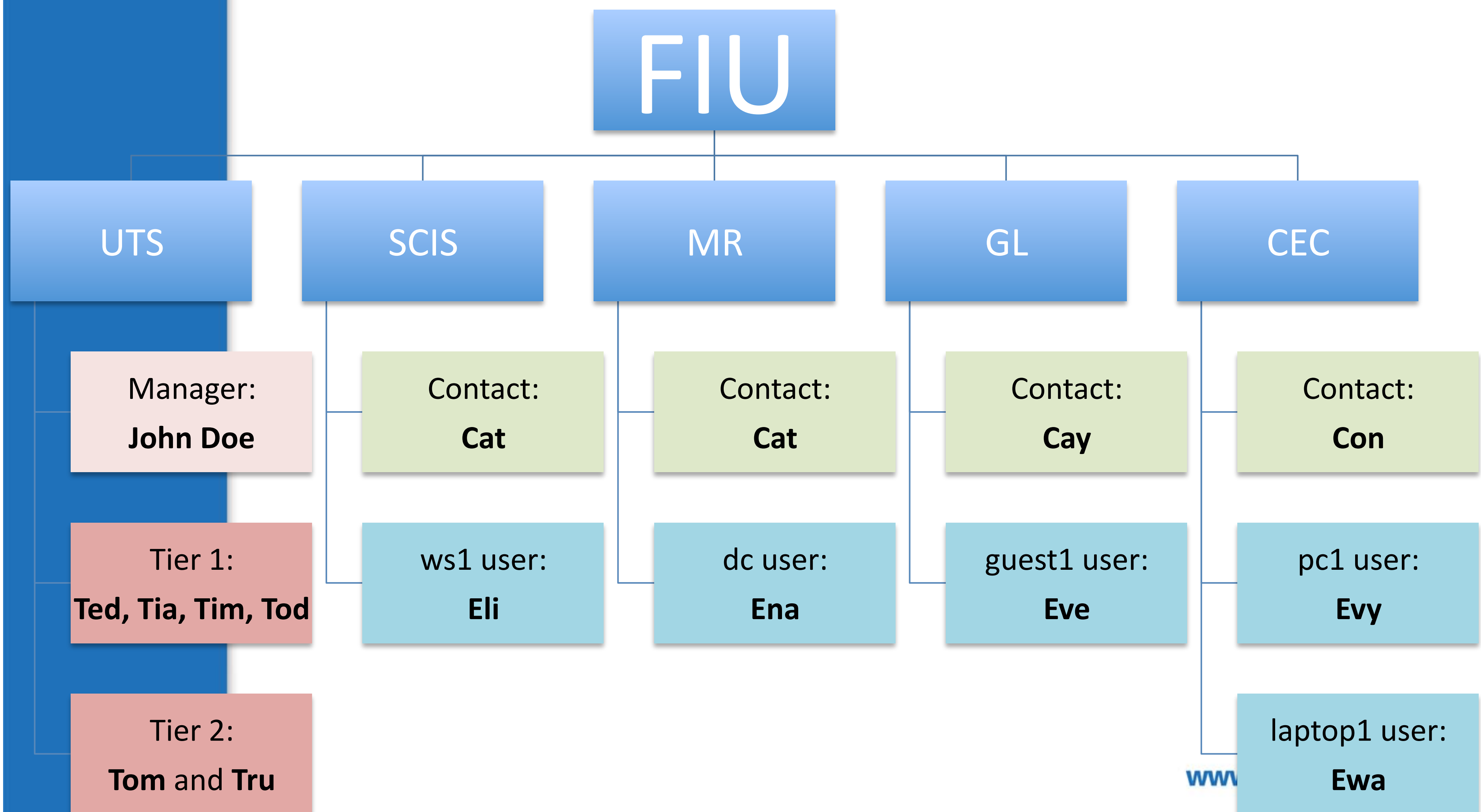
3. Created Users For Your Labs

- **SD Admin** (Service Desk Administrators):
  - John Doe (UTS); also all the other roles for testing purposes
- **SD Technicians** (Service Desk Technicians):
  - Ted (UTS), Tia (UTS), Tim (UTS), Tod (UTS), Tom (UTS) and Tru (UTS)
- **Contact** (Basic VSA Admin):
  - Cat (SCIS & MR), Cay (GL), Con (CEC)
- **Machine User** (Assumes the Machine Role):
  - Eli (ws1.SCIS), Ena (dc.MR), Eve (guest1.GL), Evy (pc1.CED), and Ewa (laptop1.CEC)

User Roles & Scopes

Scopes \ User Roles			SD Admin	SD Technician	Contact	Machine User
FIU			John Doe	Ted, Tia, Tim, Tod, Tom, Tru		
FIU	SCIS				Cat	
FIU	SCIS	ws1				Eli
FIU	MR				Cat	
FIU	MR	dc				Ena
FIU	GL				Cay	
FIU	GL	guest1				Eve
FIU	CEC				Con	
FIU	CEC	pc1				Evy
FIU	CEC	laptop1				Ewa

Organizational Structure & Service Desk Users



Note

- It is not possible to create staff members and then manually associate them with their corresponding VSA users.
- You need to ask VSA to automatically create staff members corresponding to VSA users.
- To do this, while creating the VSA users, you have the choice to create the corresponding staff members.
- Once the staff members are created, you can edit them to add more information. For example, you can modify a staff member' record to be allow him/her to see all the tickets for his/her dept.

Wrap up of Day One

- Virtual labs
- Your first service desk (see the next slide)
- Tickets created using VSA and email
- Initial Service Desk Users
- Preparation for **DAY TWO**
  - Try to catch up and finish all labs on Day One.

Service Desk Creation Checklist

- ✓ Check your licenses for desks and users
- ✓ Define your desk using a desk template
- ✓ Review the service desk fields/properties
- ✓ Review the service desk stages/workflow
- ✓ Define a default policy with coverage hours
- ✓ Review message templates
- ✓ Review procedure variables
- ✓ Setup an email reader
- ✓ Activate the new desk

Roadmap!

✓Day One

  ✓Introduction to Workshop and Virtual Labs

  ✓Kaseya Service Desk Overview

  ✓Creating Your First Service Desk

  ✓Defining Your Initial Service Desk Users

- Day Two
  - Day One Recap
  - Configuring Your Service Desk Users
  - Adding Automation to Your Service Desk

THE END!