Dell™ One Identity Manager 7.0

Help Desk Module Administration Guide

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Legend

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

WARNING: A WARNING icon indicates a potential for property damage, personal injury, or death.

IMPORTANT NOTE, **NOTE**, **TIP**, **MOBILE**, or **VIDEO:** An information icon indicates supporting information.

One Identity Manager Help Desk Module Administration Guide
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Help Desk

The integrated help desk functionality in One Identity Manager encompasses logging a problem, linking the data and information with employees, hardware and workdesks as well as chronological tracking of the steps and measures taken to work out a solution to the problem. Problems can be forwarded for processing or deferred for resubmitting.

One Identity Manager components for report subscription are available when the configuration parameter "Helpdesk" is set.

- Check whether the configuration parameter is set in the Designer. Otherwise, set the configuration parameter and compile the database.

Basic Data for Logging and Processing Calls

Enter basic data for reporting and processing a call in the One Identity Manager. This data describes:

- Support staff and teams
- How the call was received (i.e. telephone, fax, email, post)
- Priority
- Call types
- Severity
- Specified escalation levels
- Escalation procedures to put into effect
- Product definitions
- Service agreement data

Setting Up Support

To edit support staff master data

1. Select the category **Employees | Employees**.
2. Select an employee in the result list and run the task **Change master data**.
3. Change to the **Miscellaneous** tab.
4. Set the option **Help desk employee**.

5. Select the **System user** "viHelpdesk".

   The help desk login has to take place through an employee related authentication module. Thus support staff that are going work on the help desk are issued with a system user. “viHelpdesk” is supplied as default system user. The permissions and user interface for this system user are preset to allow access to the database help desk resources through the Manager.

6. Check the **Default email address**.
7. Save the changes.

NOTE: Each employee is shown in the category **Help Desk | Basic configuration data | support** and can also be edited there.

Setting up Support Teams

In addition to help desk support you can define support teams which are assigned several support staff. Support teams should be seen as virtual help desk support that is available for responding to calls. Membership in support teams determines the calls displayed for the currently logged in help desk support. All the calls that a support team member has processed, and the calls that other support team members have processed, are displayed.

To edit support team master data

1. Select the category **Help desk | Basic configuration data | Support teams**.
2. Select the support team in the result list and run **Change master data** in the task view.

   - OR -

   Click in the result list toolbar.

3. Enter the required data on the master data form.
4. Save the changes.

To add a help desk employee to a support team

1. Select the category **Help desk | Basic configuration data | Support teams**.
2. Select the support team in the result list and run **Assign employees** in the task view.

   Assign employees in **Add assignments**.

   - OR -

   Remove employees from **Remove assignments**.

3. Save the changes.

All the calls that a support team member has processed, and the calls that other support team members have processed, are displayed.

General Master Data

Enter the following general master data on the **General** tab.

Table 1: General Master Data for a Support Team

Property	Description
Display name	The display name is used to display the group in the One Identity Manager tools user interface.
Email address	Support team's email address
Group	Name of the group.
Description	Spare text box for additional explanation.
Disabled	Specifies whether the user account is disabled. Set this option if you want to block usage by this support team.

Help Desk Data

The options **Dummy employee** and **Support team** have to be enabled for the support group. These are set by default when you add a new support group. Enter a name and the default email address for the help desk support group.

Organizational Master Data

Enter the following master data on the **Organizational** tab.

Table 2: Organizational Master Data for a Support Team

Property	Description
Department	Department to which the team is assigned.
Location	Location to which the team is assigned.
Cost center	Cost center to which the team is assigned.
Office mailbox	Office mailbox.

User Defined Master Data

Table 3: User Defined Master Data

Property	Description
Spare fields no. 01.....spare field no. 10	Additional company specific information. Use the Designer to customize display names, formats and templates for the input fields.

Incoming Calls

Define the different possible types of incoming calls, such as telephone, fax, email, post.

To edit master data for incoming calls

1. Select the category **Help desk | Basic configuration data | Incoming calls**.
2. Select the incoming call in the result list and run **Change master data** in the task view.

   - OR -

   Click in the result list toolbar.
3. Edit the master data.

   Table 4: Incoming call master data

Property	Meaning
Incoming call	Type of incoming call, e.g. telephone, fax, email, post.
Description	Description of the incoming call
Disabled	Indicate whether the incoming call is in use.

4. Save the changes.

Call Status

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

To edit call status master data

1. Select the category **Help desk | Basic configuration data | Call status**.
2. Select the call status in the result list and run **Change master data** in the task view.

   - OR -

   Click in the result list toolbar.
3. Edit the master data.

   Table 5: Call status master data

Property	Meaning
Call status	Type of call status, e.g. processing, closed.
Description	Call status description.
Disabled	Indicates whether the call status is in use.
Closed	Calls with this status cannot be modified.
On hold	Leads to a temporary stop for all modifications.

4. Save the changes.

Call Types

Enter call types if you required further categorization.

To edit call type master data

1. Select the category **Help desk | Basic configuration data | Call types**.
2. Select the call type in the result list and run **Change master data** in the task view.

   \- OR -

   Click in the result list toolbar.
3. Edit the master data.

   Table 6: Call type master data

Property	Meaning
Call type	Type of call, for example hardware error, software error, handling error.
Parent call type	Creates a hierarchical structure by adding a parent call type.
Product	Assign a product to a call type to include error types for a product.
Description	Call type description.
Disabled	Indicates whether the call type is in use.

4. Save the changes.

Call Priorities

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

To edit call priority master data

1. Select the category **Help desk | Basic configuration data | Call priorities**.
2. Select the call priority in the result list and run **Change master data** in the task view.

   \- OR -

   Click in the result list toolbar.
3. Edit the master data.

   Table 7: Call priority master data

Property	Meaning
Priority	Call priority name.
Description	Call priority description.
Disabled	Indicates whether the call priority is in use.

4. Save the changes.

Severity

Define severity codes for call in order to grade the level of disturbance to work through an error.

To edit a severity code

1. Select the category **Help desk | Basic configuration data | Severity codes**.
2. Select the severity code in the result list and run **Change master data** in the task view.

   - OR -

   Click in the result list toolbar.
3. Edit the master data.

   Table 8: Severity code master data

Property	Meaning
Severity code	Severity code name.
Description	Severity code description.
Disabled	Indicates whether the severity code is in use.

4. Save the changes.

Escalation Level

Enter escalation levels to define handling procedures for incoming calls.

To edit master data for an escalation level

1. Select the category **Help desk | Basic configuration data | Escalation levels**.
2. Select the escalation level in the result list and run **Change master data** in the task view.

   - OR -

   Click in the result list toolbar.
3. Edit the master data for the escalation level.

   Table 9: Escalation level master data

Property	Meaning
Escalation level	Escalation level name.
Description	Description of the escalation level.
Disabled	Indicates whether the escalation level is used.

4. Save the changes.

Escalation Procedures

The escalation level helps to define which action should be started for which call event. Actions such as, for example:

- Executing CMD's or VB.Net statements
- Executing SQL procedures
- Sending emails
- Entering files or logs

To edit master data for an escalation procedure

1. Select the category **Help desk | Basic configuration data | Escalation procedures**.
2. Select the escalation procedure in the result list and run **Change master data** in the task view.

   \- OR -

   Click in the result list toolbar.
3. Edit the master data for the escalation procedure.

   Table 10: Escalation procedure master data

Property	Meaning
Escalation procedure	Escalation procedure name.
Calls subject to condition	Condition which causes escalation level to be triggered. The condition has to be entered in SQL syntax for which a wizard is available.
Event to be triggered	All the events you defined with the Process Editor in the Designer for the object "TroubleTicket" are displayed in the menu.

4. Save the changes.

Escalation procedure example:

If the condition specified for a call is `Severity code 2 and priority 2`, the escalation procedure `Check (Severity,Priority)` should be triggered. A schedule checks regularly whether a call has fulfilled the defined condition. If this is the case, the escalation procedure triggers the event `CallPrio2`. This causes a mail to be sent to the person dealing with the call.

Escalation procedure	Check(severity, priority)
Calls that meet the condition	ID_TroubleSeverity = '2' and ID_TroublePriority = '2'
Event to be triggered	CallPrio2

Service Agreements

A service agreement link is integrated into the help desk function that can be attached to departments, cost centers, locations, business roles, hardware and products. This allows call reaction and solution times to be determined automatically and escalation procedures that are connected to the service agreement to be triggered.

To edit service agreement master data

1. Select the category **Help desk | Basic configuration data | Service agreements**.
2. Select the service agreement in the result list and run **Change master data** in the task view.

   - OR -

   Click in the result list toolbar.
3. Edit the master data. Service Agreements

   Table 11: Service agreements

Property	Meaning
Service agreement	Name of the service agreement.
Manager or supervisor	Employee responsible for the service agreements.
Start date	Date from which the service agreement is valid.
End date	Date until which the service agreement is valid.
Reaction time [min]	Time taken to react to the call.
Solution time [h]	Time taken to provide a solution.
Disabled	Indicates whether the service agreement is in use.
Description	Description of the service agreement.

4. Save the changes.

To assign service agreements to business roles and organizations

1. Select the category **Help desk | Basic configuration data | Service agreements**.
2. Select the service agreement in the result list.
3. Select the task **Assign Business Roles and Organizations**.
4. Assign business roles and organizations in **Add assignments**.

   - OR -

   Remove assignments to business roles and organizations in **Remove assignments**.
5. Save the changes.

To assign service agreements to a product

1. Select the category **Help desk | Basic configuration data | Service agreements**.
2. Select the service agreement in the result list.
3. Select the task **Assign products**.
4. Assign products in **Add assignments**.

   - OR -

   Remove assignments to products in **Remove assignments**.
5. Save the changes.

To assign service agreements to an escalation procedure

1. Select the category **Help desk | Basic configuration data | Service agreements**.
2. Select the service agreement in the result list.
3. Select the task **Assign escalation procedures**.
4. Assign escalation procedures in **Add assignments**.-

   OR -

   Remove assignments escalation procedures in **Remove assignments**.
5. Save the changes.

To assign service agreements to hardware

1. Select the category **Help desk | Basic configuration data | Service agreements**.
2. Select the service agreement in the result list.
3. Select the task **Assign hardware**.
4. Assign hardware in **Add assignments**.

   - OR -

   Remove assignments to hardware in **Remove assignments**.
5. Save the changes.

Products

One Identity Manager calls about hardware, workdesks are added by default. You can set up products to, for example, enter calls for applications, drivers, resources and also departments, cost centers, locations.

To edit product master data

1. Select the category **Help desk | Basic configuration data | Products**.
2. Select the product in the result list and run **Change master data** in the task view.

   - OR -

   Click in the result list toolbar.

3. Edit the master data.

Table 12: Product master data

Property	Meaning
Product	Product name.
Processing level	Defines which demands the product poses on call processing as a numeric value.
Product manager	Employee responsible for this product.
Description	Description of the service agreement.
Disabled	Indicates whether the product is in use.
Spare option no. 01 - spare option no. 05	

4. Save the changes.

To assign call types to a product

1. Select the category **Help desk | Basic configuration data | Products**.
2. Select an object in the results list.
3. Select the task **Assign call types**.
4. Assign the call types in **Add assignments**.

   - OR -

   Remove the call types in **Remove assignments**.
5. Save the changes.

To assign service agreements to a product

1. Select the category **Help desk | Basic configuration data | Products**.
2. Select an object in the results list.
3. Select the task **Assign service agreements**.
4. Assign service agreements in **Add assignments**.

   - OR -

   Remove service agreements in **Remove assignments**.
5. Save the changes.

Logging and Processing a Call

Calls can be added for:

- Employees that reports the problem
- Products that have contract conditions specified

- Hardware that caused the problem
- Workdesks where the defect hardware is to be found.

Calls are filtered in the **Help desk** category by different criterion. The logged in support team member views all the calls they have to process and as well as the calls of their support team. There are also filters defined that trigger particular actions when they come into effect, for example, checking call activity. If the specified time limit is exceeded, the call wanders from the “In limit” filter to the “At the limit” filter and so on. You can implement company specific filters. These do not have a time limit but can refer to priorities, status, products, problem type or a member of support.

To enter master data for a call.

1. Select the category **Help desk** and select a filter.
2. Select the call in the result list and run **Change master data** in the task view.

   - OR -

   Click in the result list toolbar.
3. Edit the master data.
4. Save the changes.

Detailed information about this topic

- General Master Data for a Call on page 14
- Describing a Call SolutionSpecifies whether the call is dealing with a program error. on page 15
- Contacts on page 16
- User Defined Master Data on page 17
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- Creating a Call History on page 18
- Creating a Knowledge Base on page 18
- Determining Call Reaction and Solution Time on page 19
- Entering Call Processing Times on page 20

General Master Data for a Call

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

Enter the following general master data on the **General** tab.

Table 13: Call Master Data

Property	Description
Date	Time when the call was logged. The date that the call was entered is the current date.
Reported by	Employee that reported the problem.

Property	Description
Support	Support. The employee that is currently logged in is entered as help desk support for this call. This however, can be changed. **NOTE:** If the support is deleted from the database at a later date, then a backup of the calls for this support is shown. The calls can no longer be processed.
phone	Employee's telephone number.
Product	Product for which the call was logged.
To solve by	Time by which to resolve the call.
Respond by	Time by which to respond to the call.
Description	Problem description.
Measure	Measures put in place.
Call type	Type of the call.
Workdesk	Workdesk that caused the problem.
Hardware	Hardware that caused the problem.
Cost center	Cost center for booking.
Placed on hold on	Date on which the call was put on hold.
Max. on hold [days]	Maximum number of days a call can remain on hold.
Call added to thesaurus	Specifies whether the call was added to the knowledge base.
Main call active	Main call for this call.
Main call	Specifies whether this call the main call. You can reference all other calls the main call.

Related Topics

- Determining Call Reaction and Solution Time on page 19
- Creating a Knowledge Base on page 18

Describing a Call SolutionSpecifies whether the call is dealing with a program error.

Enter the following data on the **Solution** tab.

Table 14: Master Data for Solution Description

Property	Description
Problem solution	Description of the solution to the problem.

Property	Description
Closed on	Date on which the call was closed.
Short call	Specifies whether the call being dealt with is short. If the solution time for a call is less than 5 minutes, it can be classified as a short call. This call is therefore considered to be closed.
Invoiced	Specifies whether the call should be invoiced.
Placed on hold	Specifies whether the call is on hold. This option is set if the call is given the corresponding processing status.
Closed	Specifies whether the call is closed. This option is set if the call is given the corresponding processing status.
Archived	Specifies whether the call is archived. This option is set with the schedule “Mark help desk calls as history”. The task checks the date of closed calls at regular intervals. All calls that have been closed for more than a year are archived.
Program error	Specifies whether the call is dealing with a program error.
Process errors	Specifies whether the call is dealing with a processing error.
Operating error	Specifies whether the call is dealing with an operating error.
Manufacturer error	Specifies whether the call is dealing with a manufacturer error.

Contacts

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

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

Table 15: Contacts

Property	Description
Reported by	Employee that reported the problem.
First name	Employee's first name.
Phone	Employee's telephone number.
Last name	Employee's last name.
Fax	Employee's fax number.
Description	Spare text box for additional explanation.
Mobile phone	Employee's mobile number.
Additional staff	Additional staff to used as a contact.
First name	Employee's first name.
Phone	Employee's telephone number.

Property	Description
Last name	Employee's last name.
Fax	Employee's fax number.
Description	Spare text box for additional explanation.
Mobile phone	Employee's mobile number.
Location description	Detailed description of the location.

User Defined Master Data

Table 16: User Defined Master Data

Property	Description
Spare fields no. 01.....spare field no. 10	Additional company specific information. Use the Designer to customize display names, formats and templates for the input fields.

Creating a Call Attachment

Table 17: Configuration Parameter for Call Attachments

Configuration parameter	Meaning
HelpdeskHelpdesk\Attachment\CreatePathScript	This configuration parameter contains the name of a script for adding the attachments directory. An example implementation is in script "VI_AE_CreateAttachmentPath".
Helpdesk\Attachment\DialogScript	This configuration parameter contains the name of the script for generating the directory path for the call attachments. An example implementation is in script "VI_AE_GetAttachmentPath".
Helpdesk\Attachment\RootPath	This parameter contains the root path for call attachments, for example "\\SERV01\Attachments".

You can store attachments with a call. Specify the path to the attachments directory in the configuration parameter “Helpdesk\Attachment\RootPath”. When a call is saved, a directory is added that is named by the internal call number.

To edit an attachment

1. Select the category **Help desk** and select a filter.
2. Select the call in the result list and run **Attachments** in the task view.

   This opens the attachment directory. You can add, shown and edit files in this directory.
3. Save the changes.

Creating a Call History

Table 18: Configuration Parameter for Call History

Configuration parameter	Meaning
Helpdesk\TroubleHistory	This configuration parameter specifies whether a call history is created. An entry is created in the call history for each action.

In order to follow though incoming calls, a history is available which shows each step in the help desk procedure and the measures that were taken.

NOTE: The call history is only written when the configuration parameter “Helpdesk\TroubleHistory” is set.

To display the call history

1. Select the category **Help desk** and select a filter.
2. Select the call in the result list and run **History** in the task view.

   You can view detailed information for each entry, the support team member and the measures taken for the call.

Creating a Knowledge Base

You have the option to build up a knowledge base of reported calls. The thesaurus serves as a catalog where calls are combined under a particular term. The terms that are used do not have to be included in the call description.

To display the knowledge base

- Select the category **Help Desk | Knowledge base**.

To define an item for the knowledge base

1. Select the category **Help desk | Basic configuration data | Thesaurus**.
2. Click in the result list toolbar.
3. Define an item in the thesaurus.
4. Save the changes.

To assign items to calls

1. Select the category **Help desk** and select a filter.
2. Select the item in the result list.
3. Select the task **Thesaurus**.
4. Assign the items in **Add assignments**.

   - OR -

   Remove the entries in **Remove assignments**.

5. Save the changes.

NOTE: Calls that are added to the thesaurus are labeled the option **Call accepted in Thesaurus**.

To assign call types to an item

1. Select the category **Help desk | Basic configuration data | Thesaurus**.
2. Select the item in the result list.
3. Select the task **Assign call types**.
4. Assign the call types in **Add assignments**.

   - OR -

   Remove the call types in **Remove assignments**.
5. Save the changes.

Determining Call Reaction and Solution Time

Table 19: Configuration Parameters for Reaction and Solution Times

Configuration parameter	Meaning
Helpdesk\HoliDayRule	This configuration parameter maps the public holiday rules for the help desk. These are taken into account when reaction and solution times are calculated.
Helpdesk\ReactionTime	This configuration parameter contains the default time in minutes in which a reaction should take place.
Helpdesk\SolutionTime	This configuration parameter contains the default time in hour in which the problem has to be solved.

If a call is logged by an employee, the following information is collected in order to calculate the reaction and the solution time:

- Service agreements from the employee’s cost center
- Service agreements via the employee’s department
- Service agreements via the employee’s business roles
- Service agreements for the product
- Default settings from configuration parameters

Minimum reaction and solution times are determined from all these agreements. Subsequently all the data that has been determined is rounded up to the next working day. The working day is determined by taking the employee’s public holidays into account. Public holiday are entered by state (county) in the One Identity Manager. You can add separate public holidays for states.

Take into the account the following variations in order of priority to find out to which state the employee is assigned.

- Priority 1:

  The employee is assigned directly to a state.

- Priority 2:

  The employee’s location is assigned to a state.

- Priority 3:

  The employee’s business role is assigned to a state. If there are several business roles with different states they are sorted alphabetically and the first state is taken.

Employees that come into consideration:

- The employee that logged the call
- Help desk support that logged the call

Because different states could be determined for these employees, processing is controlled by the configuration parameter "Helpdesk\HoliDayRule".

Table 20: Values of Configuration Parameter "Helpdesk\HoliDayRule"

Value	Meaning
0	Public holidays are not taken into account.
1	Location of caller decides the public holidays (state or county of location).
2	Location of support decides the public holidays (state or county of location).
3	It is a public holiday when either the caller or the support member has a holiday (state or county of employee).
4	It is a public holiday when both the caller and the support member has a holiday (state or county of employee).

Entering Call Processing Times

Table 21: Configuration Parameter for Call Processing Times

Configuration parameter	Meaning
Helpdesk\AutomatedTroubleWorkTimes	This configuration parameter specifies how call processing time should be recorded. If the parameter is set, the time from opening the call to saving the call is measured and entered as call processing time. If the parameter is not set, processing times have to entered manually.

The total time and effort is calculated by totaling all processing times. Internal overheads are calculated from processing times that are marked with the option **internal**. The remaining call processing times make up billable overheads.

To display a call's processing time

1. Select the category **Help desk** and select a filter.
2. Select the call in the result list and run **Time and effort** in the task view.

   This provides you with an overview of the total processing time required for a call and detailed information about the processing time required for each individual call.

To log processing time automatically

- To do this, enable the configuration parameter “Helpdesk\AutomatedTroubleWorkTimes”.

  The time from opening the call on a call master data form to the time when it is saved is measured and used as the processing time.

To enter processing times manually

1. Select the category **Help desk** and select a filter.
2. Select the call in the result list and run **Time and effort** in the task view.
3. Open the time keeping form with the button.
4. Enter the required data:

   Table 22: Time keeping

Property	Meaning
Date	Date of processing.
Duration	Time it took to process the call in minutes.
Internal	Specifies whether the processing time was spent internally.
Remark	Remarks about the processing time.

5. Save the changes.

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Technical support resources

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The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. In addition, the portal provides direct access to product support engineers through an online Service Request system.

The site enables you to:

- Create, update, and manage Service Requests (cases)
- View Knowledge Base articles
- Obtain product notifications
- Download software. For trial software, go to Trial Downloads.
- View how-to videos
- Engage in community discussions
- Chat with a support engineer

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