NetSupport

NetSupport ServiceDesk

Product Manual – Version 5.0

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About NetSupport ServiceDesk

NetSupport ServiceDesk is a powerful yet easy-to-use browser-based help desk, available on its own or as part of the full NetSupport DNA Asset Management suite. NetSupport ServiceDesk helps you effortlessly track, organise, manage and answer the toughest desktop support challenges.

Supporting the essential ITIL processes – Incident, Problem, Change and Service Level Management - NetSupport ServiceDesk ensures your support team can effectively manage customer expectations and minimise the amount of system downtime.

With a fully customisable and intuitive web-based interface that supports both desktop and mobile platforms, robust workflow processes, a wealth of management reports and a customer-friendly self-service portal, NetSupport ServiceDesk is guaranteed to take the strain out of service delivery!

Definitions

Administrator
The user(s) who has full access to NetSupport ServiceDesk functionality. They can perform all tasks required in running a successful service desk, from creating user accounts to resolving reported problems.

ServiceDesk Operator
Responsible for providing technical support to end-users, ServiceDesk Operators have sufficient rights to be able to oversee the problem resolution process. Your licence will determine how many ServiceDesk Operators you can have.

Operator
This type of user account can be used as a generic repository for Incidents, Problems and Change Requests. It does not give the user access to ServiceDesk and does not impact on your licence levels.

End-user
An end-user is the Client or User who needs the ability to report a problem. You can have as many user accounts as required without it affecting your licence levels.

Installation

Planning an Installation

Before commencing your installation of NetSupport ServiceDesk, ensure the system pre-requisites are met in terms of end-users being able to access NetSupport ServiceDesk via their web browser and the presence of a suitable environment in which to host the database.

The on-screen instructions in NetSupport ServiceDesk Installshield Wizard will guide you through the process and at the end of the installation you will be asked to configure your personalised NetSupport ServiceDesk settings.

System Requirements

Server
Windows 2003 and 2008 and 2012 Server.
Windows XP Professional SP3 (not recommended as this will only allow 10 concurrent sessions).

Note: For further information when installing on Windows 2008 Server, Windows 7 or Vista machines, please refer to the following article on our online knowledge base:

www.netsupportsoftware.com/support/td.asp?td=628

The Server must also have Internet Explorer 7 or later installed.

Note: 64bit platforms must be set to run IIS in 32bit mode.

Client
Windows XP, 2003, Vista, 2008, Windows 7, Windows 8 and 8.1 (in non Metro mode), Windows 10, Mac and Linux.

The Client must be running one of the following browsers:
Internet Explorer: version 7 and above
Firefox: versions 26 and later
Chrome: version 35 and later.

Note: For the Remote Control integration, the Host OS for the Client must be Windows 2000, 2003, XP, Vista, 2008, Windows 7, Windows 8, 8.1 or Windows 10.

Database
SQL server 2000 and above or MSDE version 2 or above.

Note: If an SQL server is not available, MSDE version 2 can be installed with the application.

Reports
Adobe Flash Player is required to view reports.

Support for mobile devices
NetSupport ServiceDesk provides built-in support for mobile devices, ensuring that operators working remotely can still receive and update items.

NetSupport ServiceDesk will automatically detect when it is accessed from a mobile device and display a set of simplified pages that can be used from most common mobile devices. If your mobile device is not automatically detected, please refer to the following article on our online knowledge base for more information:

www.netsupportsoftware.com/support/td.asp?td=555

Note: To use the 'Pin to Taskbar' feature in Windows 7 or later you will need to remove certain words from the 'Reserved List'. Please refer to knowledgebase article 582 for further information www.netsupportsoftware.com/support/td.asp?td=582

Installing NetSupport ServiceDesk

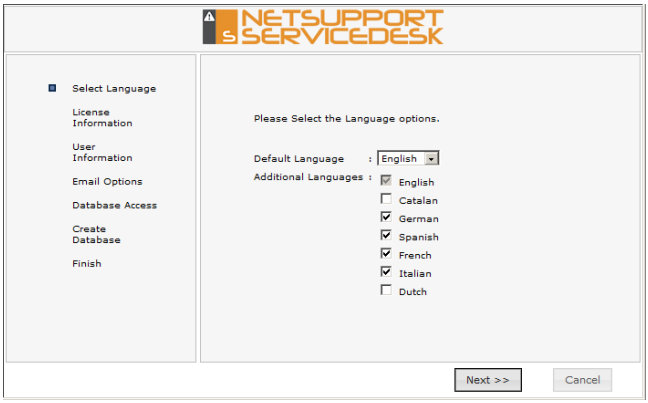
The NetSupport ServiceDesk Installshield wizard will guide you through the installation process, enabling you to quickly configure the NetSupport ServiceDesk database on your chosen server. After installation you will need to restart the PC in order to complete the setup.

1. When setup commences, the Installshield wizard Welcome screen will appear. Click **Next** to continue.
2. The NetSupport ServiceDesk Licence Agreement will appear. Please take a few moments to read the agreement and only proceed if you agree to the terms of the Licence.
3. Select the appropriate environment in which to host the NetSupport ServiceDesk database. This can be an existing SQL Server or Microsoft's Database Engine (MSDE). Click **Next.**

4. Confirm the location for the setup files. The default folder is **c:\Program Files\NetSupport\NetSupport ServiceDesk**. Click **Next**.
5. Review the details of the installation and click **Next** to start copying the setup files.
6. When the installation has finished, you will be prompted to restart the machine. You need to do this in order to complete the setup. Click **Finish** to restart.
7. When you log on after restart, the NetSupport ServiceDesk Setup wizard will appear.

NetSupport ServiceDesk Setup Wizard

The NetSupport ServiceDesk Setup wizard completes the installation process. The wizard prompts you for your default configuration settings - such as your licence information, company details, email server settings and the database access details. These items can be adjusted by an administrator within NetSupport ServiceDesk once installed.



Select Language. NetSupport ServiceDesk provides multi-language support allowing Operators and end-users to easily customise the interface to reflect a chosen language. At the set up stage, you can specify the default language as well as any additional languages that may be needed. When logged into NetSupport ServiceDesk, you simply click the relevant language button displayed on the toolbar and the interface will change to that language. You can also change the default language from within NetSupport ServiceDesk in the **Customise** - **Appearance** section and add additional languages by selecting **Admin**-**Customise** from the toolbar.

Licence Information. Enter your company name and confirm your Licence information. If you are evaluating the product, use the default serial number **EVAL;** otherwise enter the serial number and Licence code you have been provided with.

User Information. NetSupport ServiceDesk users are grouped by company and department, mirroring the structure of your organisation. The details entered here will be used to create the initial company and department in the NetSupport ServiceDesk database. A default 'Admin' user is created with full access rights. Others can be added by the system administrator once logged in.

Email Options. NetSupport ServiceDesk can be configured to send automated email notifications. To use this feature, you must specify your SMTP server settings. Specify the sender's email address; this must be a valid address that exists on the server. Enter the sender's full name. The sender's details would generally be those of the system administrator. After installation, you can change these details by accessing the **Mail Server Settings** option where you can also configure a POP3 server in order for NetSupport ServiceDesk to track incoming emails.

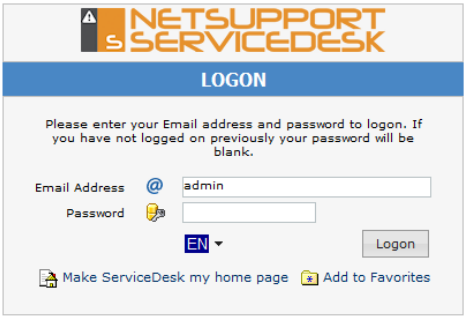
Database Access. Finally, enter the details used to access the database server. Enter the server name/address and confirm the port number that the server is listening on. Confirm the database name, user name and password. If the database is hosted on a SQL server, you can use the default settings.

The database will now be created at the specified location and, when complete, you will be advised of the URL required to access the NetSupport ServiceDesk database via each user's web browser.

Starting NetSupport ServiceDesk

Start your web browser and enter the URL address of the NetSupport ServiceDesk application (i.e. the Server IP address where you installed NetSupport ServiceDesk). You may prefer to create a shortcut on the desktop for future use.

The Logon screen will appear.

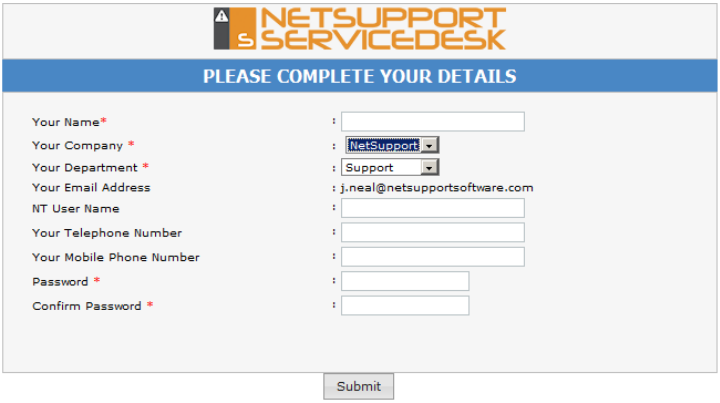


The log on process requires the user's email address and a password. Should a user forget their password, they can ask for an email reminder to be sent.

Note: For first time use after installation, a default administrator logon is provided which comes with full functionality rights. Email Address: **Admin,** Password: **dna**. The person acting as the administrator should change the password at the earliest opportunity.

If a user attempts to log on with an email address that doesn't already exist in the NetSupport ServiceDesk database, they will be asked to complete their details. By submitting their details, a user account will be created but it will have limited rights. A user with appropriate permissions can edit the details if required.

Note: To prevent first time users creating their own accounts, see **Admin - Customise, Create Users** when they first log on.



A language identifier is displayed, allowing the user to switch the language for NetSupport ServiceDesk. The available languages can be set during installation or within NetSupport ServiceDesk; select the Admin tab, click the **Customise** icon and select the **Additional Languages** icon from the toolbar.

After logging on, the user's default start page will appear. This can be changed in User Preferences.

Note: Before end-users start logging problems, the system administrator needs to perform a number of admin tasks in order to make the database ready for use.

Logoff

To exit NetSupport ServiceDesk, select the Home tab and click the **Logout** icon in the toolbar.

Note: You can have a custom logoff page displayed to users when they exit NetSupport ServiceDesk. Select the Admin tab, click the **Customise** icon in the toolbar, select the Appearance tab and enter a URL to your custom page in the **Custom Logoff page** option.

Screen Layout

The NetSupport ServiceDesk interface contains the following areas:

Tabs

Navigate between NetSupport ServiceDesk options. There are four main tabs displayed within NetSupport ServiceDesk:

- **Home**
  From here, you can create and search for Incidents, Problems and Change Requests, access the Mail Center, create and view solutions and access user details and preferences.

- **Admin**
  Provides access to Administration tools such as: email settings; workflow rules; creating and editing companies; departments and users; and customisation settings.

- **Reports**
  Allows you to view, configure and create reports for NetSupport ServiceDesk.

- **Lists**
  Displays the Incident, Problem and Change Request lists. You can also search for items here.

Toolbar



The toolbar options vary depending on which tab you have selected. The options available to each user will depend on the permissions that have been granted by the system administrator.

Information window



Having selected a tab or toolbar option, the appropriate information window for that task will appear. On the right-hand side of the window, recently accessed items will be listed, providing quick access to the most frequently used items.

Notes:

- To add additional languages from within NetSupport ServiceDesk, select the Admin tab, click the **Customise** icon and then the **Language** icon in the toolbar.
- To edit the default language, select the Admin tab and click the **Customise** icon in the toolbar. In the Appearance section change the language as required.
- When a user first logs into NetSupport ServiceDesk, the Summary page will be displayed. You can create a customised start page for companies, departments or individual users in the Customise section.

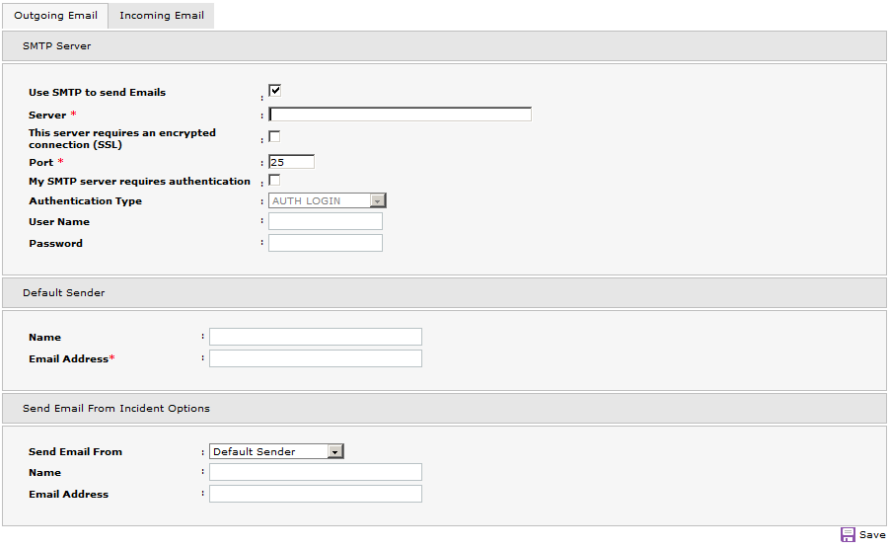
Admin Options

Before allowing end-users to log problems there are a number of administrative tasks that need to be performed. The Admin options enable System Administrators to configure NetSupport ServiceDesk to suit personal requirements.

- Mirror your organisational structure by creating company, department and individual user accounts.
- Set-up appropriate security rights at company, department and user level.
- Set-up default assignees for particular types of problem.
- Create customised email notifications.
- Build and manage a pre-defined library of Categories and Solutions.
- Customise the appearance of the NetSupport ServiceDesk interface.

Mail Server Settings

In order to use NetSupport ServiceDesk's email notification facility, you must configure your Mail Server settings. Select the Admin tab and click the **Settings** icon in the toolbar.



Outgoing Email

SMTP Server

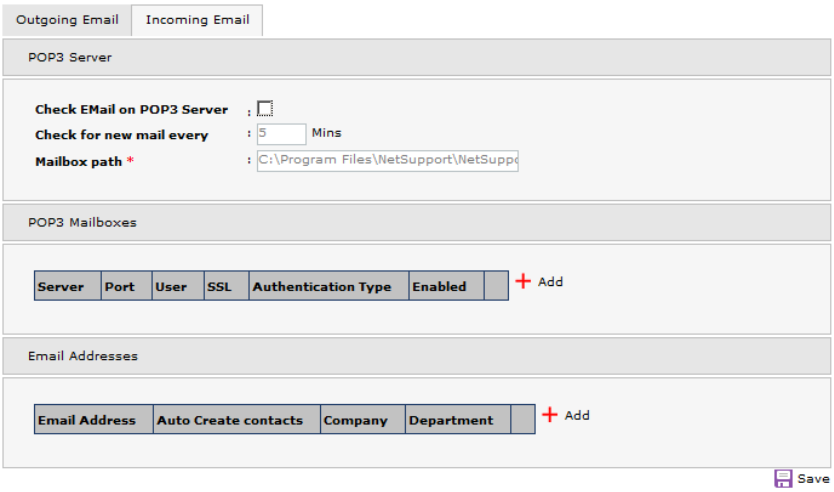
To configure NetSupport ServiceDesk to send email notifications enter your SMTP Server details. If applicable, include appropriate authentication information.

Default Sender

Specify the default sender's contact details, name and email address. This could be a generic ServiceDesk Administrator account or a specific person.

Send Email from Incident Options

If you prefer not to have a default address for sent emails, you can select the logged on user details or state a specific address.



Incoming Email

POP3 Server

In order to manage incoming emails, specify details of your POP3 Server.

POP3 Mailboxes

Support for multiple POP3 mailboxes is provided. Click **Add** to enter the mailbox details. If required, you can set the NetSupport ServiceDesk POP3 service to connect to the POP3 Server using an SSL connection.

Note: The default port for POP3 over SSL is 995. If this is not the same for your Mail Server, you should change the port setting.

Email Addresses

If required, you can choose to create a new user from just the name and email address of a new contact. Click **Add** and enter the email address mail will be sent to. Ensure **Automatically create contacts from emails sent to this address** is checked and enter the company and department that the new contact will be assigned to.

Notes:

- Specified email addresses must be linked to a POP3 mailbox.
- To automatically assign items received from different mailboxes configured in NetSupport ServiceDesk to specific departments or Operators, you must create new incoming email rules under the Category Description section. For each new rule, you must ensure that the **Where to look for the data** field is set to **The To Address**, and then link the address the email was sent to, to a specific category. The category chosen will also need to be configured so it's assigned to your chosen department or Operator.

Click **Save** to confirm the changes.

Incoming Email Rules

NetSupport ServiceDesk can monitor multiple mailboxes for new email messages and, by applying certain rules, can then create new items or update existing items based on the content of the incoming mail. If you have multiple mailboxes, you can differentiate between which mailbox the incoming email is sent to, ensuring emails are automatically assigned to the correct department.

When the email arrives, it will be checked and the following actions will occur:

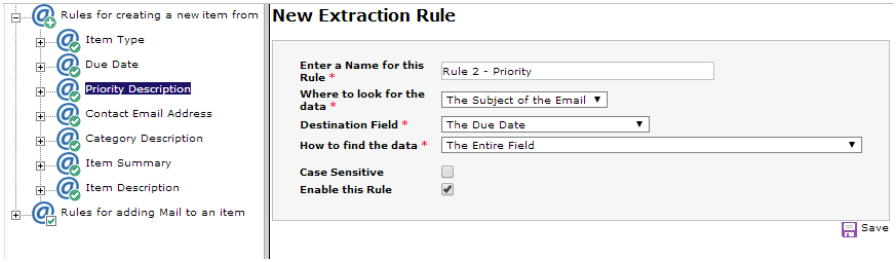
- If NetSupport ServiceDesk establishes that the message relates to an existing item, the item will be updated with the content of the email.
- If the message cannot be related to an existing item, NetSupport ServiceDesk will attempt to create a new one. For this to happen, the email needs to contain a minimum amount of information and the email rules you create dictate how NetSupport ServiceDesk finds the data in order to populate the item.

  Note: A new item and user can be created from just the name and email address of a new contact. This can be set for specific email addresses in the Mail Server settings.

- Any emails that do not satisfy any of the pre-defined rules are stored in NetSupport ServiceDesk's Mail Center, where they can be manually actioned by an Operator.

Note: For NetSupport ServiceDesk to be able to process incoming emails, you will need to configure your POP3 server settings.

1. Select the Admin tab and click the **Rules** icon in the Email section of the toolbar.
2. The tree view displays a number of pre-defined categories. These equate to the various data fields found in an item. You can add rules to any number of these categories in order to ensure that NetSupport ServiceDesk can find sufficient detail in the email to populate an item. As a minimum requirement, you should have a rule that picks up the contact email address, contact name or NT user name, one for the Category description and one for the item description.
3. Click the **New Rule** toolbar button.
4. Enter the rule properties.



- Enter a suitable name for the rule.
- Indicate where in the email NetSupport ServiceDesk should look for the data to populate each item data field.
- Specify the destination field.
- Select the most appropriate option for finding the data. Depending on your selection, you can specify one or two items of variable data to help pinpoint the required information.
- Indicate whether the search should be case sensitive.
- You can enable or disable the rule as required.

5. Click **Save**.

Mail Center

Messages coming into NetSupport ServiceDesk that do not satisfy any of the established email rules will be stored in the Mail Center for an Operator to take the appropriate action.

The Mail Center icon on the Home tab displays how many Emails are awaiting action. In the Mail Center window a list of Emails awaiting action will appear in the top pane with the content of the highlighted email displayed in the bottom pane.

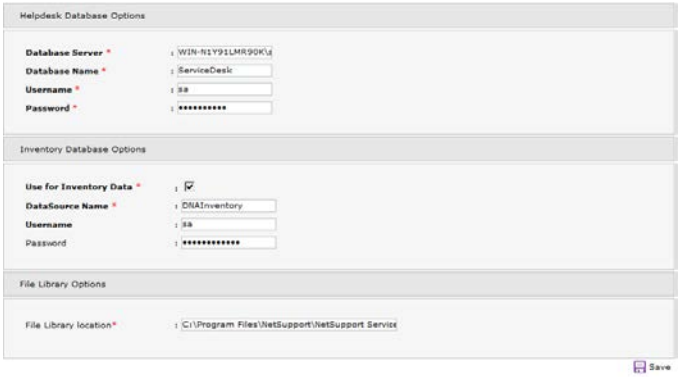
The following actions can be performed:

- Forward the email to a specific person to action.
- Delete the email.
- Create an Item from the email details.
- Associate the email with an existing Item.

DB Options

The Database Options page allows an Administrator to change the properties that define where the NetSupport ServiceDesk Database is stored.

In addition, if you have purchased the DNA Inventory module you will need to enable the gathering of Inventory data and specify the Data Source name.



NetSupport ServiceDesk Database Options

Database server

This is the name or IP Address of the SQL or MSDE database server that hold the NetSupport ServiceDesk Database. The default setting for this option is set during the installation of NetSupport ServiceDesk.

Database Name

This is the name of the NetSupport ServiceDesk Database on the SQL server. The default setting for this option is set during the installation of NetSupport ServiceDesk.

Username

This is the user name that is used by the NetSupport ServiceDesk Application to access the NetSupport ServiceDesk Database.

Password

The Password for the above user.

Inventory Database Options

Use DNA for Inventory Data

When this option is checked the Inventory Data from DNA can be displayed on an item on the NetSupport ServiceDesk. If NetSupport ServiceDesk is installed on the same machine as NetSupport DNA this option is set on installation.

DataSource Name

This is the name of a System ODBC Data source that is used by the NetSupport ServiceDesk to read the inventory information. If NetSupport ServiceDesk is installed on the same machine as NetSupport DNA an ODBC Datasource named 'DNAInventory' is created during installation of NetSupport ServiceDesk, otherwise this Data source must be created manually.

Username

The username used to access the DNA Datasource.

Password

The Password for the above user.

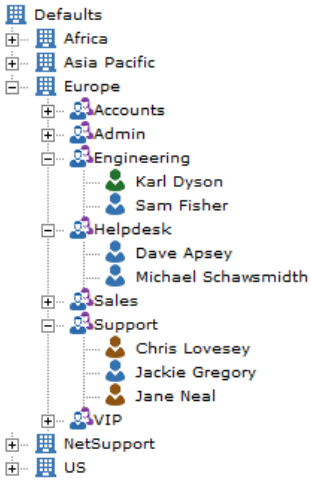
File Library Options

File Library Location

This is the location that any files that are added to an item are stored. By default this is set to the Data folder in the NetSupport ServiceDesk installation folder. If this location is changed then any files in the existing location are copied to the new location.

Users

The Users options enable Operators with the appropriate rights to create and manage user accounts and determine where logged problems should be assigned for resolution. This is an important part of the Admin process and should be in place before users get the chance to log Incidents, Problems or Change Request.



Within NetSupport ServiceDesk you replicate the hierarchical structure of your organisation by grouping end-users in their appropriate company and department. A company might be a specific line of business containing a number of sub-departments. Details are listed within a tree view enabling easy ongoing maintenance.

When an end-user creates a new item, the system uses the pre-defined company and department details to determine where the item should be assigned.

At the stage where you add the companies and departments you can also create individual end-user records but this is not vital as each user can add themselves to the NetSupport ServiceDesk database when they first attempt to log a problem. However, you should create accounts for those users who will act as ServiceDesk Operators.

With your basic Tree View ready you can then decide how problems are assigned. You have the following considerations here:

Which Departments and Users should be able to resolve logged problems?

Before a department can be assigned problems it needs to be flagged as a 'technical department'. There is no limit to the number of technical departments you have in the database, you might have one central area that all companies report into or each company may have their own. A default Admin area is provided within the database and Items will be assigned here if you haven't added your own technical departments.

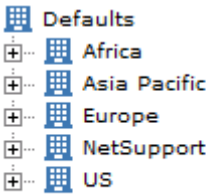
Once you have decided upon your technical departments, the contacts within that department need to be given the appropriate ServiceDesk or Admin Operator permissions in order to view and resolve the problems assigned to them. In the tree view an orange icon indicates which users have been given Admin or ServiceDesk Operator status. A blue icon is applied to end-users.

Where should problems logged by a particular end-user be assigned?

For each department, whether technical or not, you need to indicate where to assign items which have been logged by users in that department. This could be a technical department or a specific ServiceDesk Operator. Alternatively, you can set assignees for a particular type of problem.

With your organisation and contacts structure in place, end-users will now be able to add themselves to the appropriate part of the Tree view when they logon for the first time and when they enter a new item the system will know where to assign it.

Create New Company



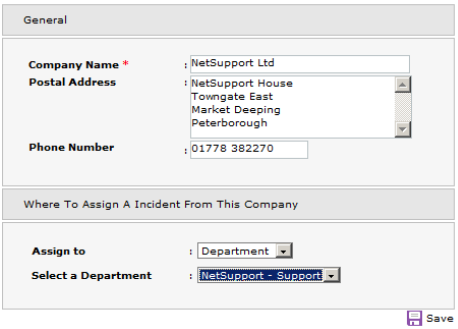
Depending on the structure of your organisation you might have several companies listed within your NetSupport ServiceDesk database, for example different lines of business or regional offices. Each company can have multiple departments listed below it.

When adding companies consider what access rights, or permissions, should apply. In NetSupport ServiceDesk user permissions are inherited meaning that when you create a new company it will inherit the systems Default privileges. In turn, any departments you subsequently list within the company will also inherit rights from above. However, the defaults only provide basic end-user rights so you would need to change these if the company/departments need to resolve problems.

By default, all Operators will have access to the company in the Tree view, this can be restricted when editing a company if required.

To create a new company:

1. Select the Admin tab and click the **Users** icon in the toolbar. The current tree view will appear.
2. Choose **New Company** from the toolbar. The New Company window will appear.



3. Enter the following. Fields marked with a * are compulsory:
   The companies name, address and telephone number.

   Decide where to assign Items logged by users in this company**.** You can choose to send them to a department, where they will be assigned to whoever is the default assignee for that area, or you can select a specific user. The drop-down lists show all departments that have been flagged as Technical and users that have ServiceDesk Operator rights. If the required option is not available, save the partially complete record and edit it when the appropriate departments/users have been added to the database.

4. Click **Save**.
5. The new company will be added to the Tree View.
6. With the new company record selected in the Tree view, apply the appropriate Preferences, Permissions and Operators.

Create New Department

Multiple departments and sub-departments can be created within each company in the tree view.

A key consideration when adding a department to the database is whether it will be an 'end-user' or 'technical' area. If you expect the department to be assigned Items, it must be flagged as technical and be given the appropriate Permissions.

To create a new department:

1. Select the Admin tab and click the **Users** icon in the toolbar. The current tree view will appear.
2. Choose **New Department** from the toolbar. The New Department window will appear.



3. Enter the following. Fields marked * are compulsory:

   Select the company that the department should be attached to. If this is to be a sub-department of another, select the 'parent' department. Enter the new department name. If the department is to be responsible for receiving and resolving problems, flag it as technical.

   If it is a technical department, select the default ServiceDesk Operator that Items should be assigned to. You will need to create the user record before being able to do this.

Finally, decide where Items raised by this department should be assigned. This can be to any other technical department or ServiceDesk Operator. If this information was added at company level you do not have to specify the same details again as they will be inherited. However, you can select another assignee for individual departments if required.

4. Click **Save**.
5. The new department will be added to the Tree View.
6. With the new record selected in the Tree view, apply the appropriate Preferences, Permissions and Operators. In addition, once 'users' have been added to the department you can assign a 'departmental manager'. As part of the workflow process you can copy automated email notifications to the nominated person.

Note: By default, all Operators will have access to the department in the Tree view, this can be restricted when editing a department if required.

Create Users

In addition to the default Admin user, NetSupport ServiceDesk provides three other account types.

ServiceDesk Operator

At the point when you create your company/departmental structure, you are mainly concerned with those users who will be assigned items. A department flagged as technical will generally have contacts within it that need at least ServiceDesk Operator permissions.

Operator

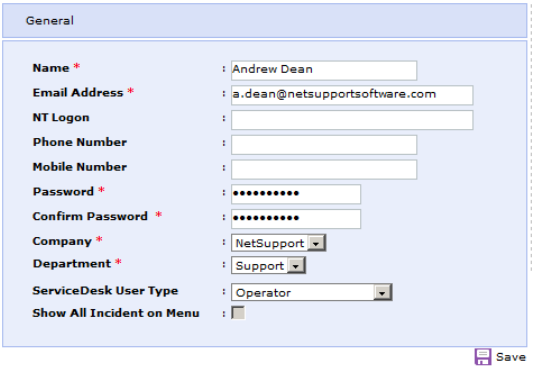
Operator status enables you to create third-party support organisations within NetSupport ServiceDesk. This type of user can have items assigned to them but cannot log on and use NetSupport ServiceDesk. It does not count against your licence limits.

Normal user

End (normal) users can add themselves to the database when they first log on to NetSupport ServiceDesk; the system recognising that the user's email address does not currently exist. By default, they will be given basic permissions in order to log their problem. An Administrator or ServiceDesk Operator with appropriate permissions can edit the user information if these rights aren't sufficient.

To create a new user:

1. Select the Admin tab and click the **Users** icon in the toolbar. The current tree view will appear.
2. Choose **New User** from the toolbar. The New User window will appear.



3. Enter the user's details, fields marked with an * are compulsory.

   If you are using Windows authentication to log on to NetSupport ServiceDesk, then you must enter an NT logon for the user.

   Select the type of user account from the drop down list.

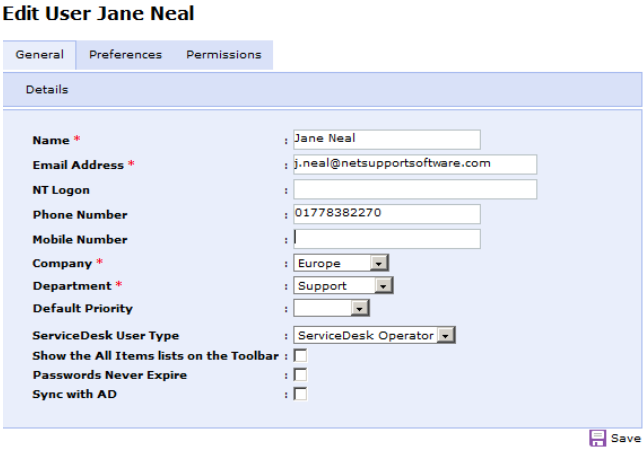
   You can restrict ServiceDesk Operators' access to certain items by unchecking **Show All Incidents on Menu**. This ensures that the Operator can only deal with items assigned specifically to them or their department.

4. Click **Save**.
5. The new user will be added to the Tree view.
6. With the new user record selected in the Tree view, apply the appropriate Preferences and Permissions.

Edit User Details

The Users Tree View reflects the structure of your organisation and lists the companies, departments/sub departments and users that have been created. These details can be amended or deleted at any stage by a user with the appropriate permissions:

1. Select the Admin tab and click the **Users** icon in the toolbar.
2. In the tree view select the company, department or user that you want to edit.



3. Select a tab and change the required items.
4. Click **Save.**

or

1. To delete a record, select the item in the Tree View and click **Delete**. You cannot delete a record if there are outstanding items assigned to the company, department or user.

User Permissions

Permissions control the access a user has to certain NetSupport ServiceDesk functions. The permissions that apply to a user can either be explicitly defined on the users object or inherited from the users department, company or the systems Default Permissions.

When assigning permissions you can select from the range of pre-defined templates that are supplied, depending on whether the user is an Administrator, ServiceDesk Operator or End-user, you can customise the functionality to suit individual requirements or create your own templates.

NetSupport ServiceDesk supplies a default Administrator logon ensuring there is at least one user with global permissions. There is also a default set of end-user permissions built in and any new companies, departments and end-users will inherit these rights.

The setting of permissions is particularly important when deciding which areas will be responsible for dealing with Items. For each company or department you create you decide to which Technical department or ServiceDesk Operator Items raised by that area should be assigned. This process relies on the assignees having the appropriate permissions.

The permissions are grouped into the following categories:

Incidents/ Problems/ Change Requests

Create

This Permission allows a user to create an Incident, Problem or Change Request.

Read

This Permission allows a user to read all Incidents, Problems or Change Requests on NetSupport ServiceDesk but not save any changes to them.

Delete

This Permission allows a user to delete any Incident, Problem or Change Request on NetSupport ServiceDesk.

Edit

This Permission allows a user to edit any Incident, Problem or Change Request on NetSupport ServiceDesk, however they cannot change the assignee or add a solution.

Some of the Special Permissions will override these permissions.

Reports

Create Report

Adds the “New” option to the menu in the Reports section and allows the user to create a Report.

Read Reports

Adds the “Explore” option to the menu in the Reports section and allows the user to read an existing Report.

Delete Report

Adds the “Explore” option to the menu in the Reports section and allows the user to delete an existing Report.

Edit Report

Adds the “Explore” option to the menu in the Reports section and allows the user to edit an existing Report.

Company

Create Companies

This Permission puts the “Users” option on the menu in the Admin section. This Permission also puts the **New Company** icon on the toolbar in the Users page and allows the user to create a new company and read the details of existing companies.

Edit Companies

This Permission puts the “Users” option on the menu in the Admin section. This Permission also puts the **Save Company** icon in the company section of the toolbar on the Users page and allows the user to read the details and save changes made to an existing company.

Delete Companies

This Permission puts the “Users” option on the menu in the Admin section. This Permission also puts the **Delete Company** icon in the company section of the toolbar on the Users page and allows the user to read the details and to delete existing companies.

Departments

Create Department

This Permission puts the “Users” option on the menu in the Admin section. This Permission also puts the **New Department** icon on the toolbar in the Users page and allows the user to create a new department and read the details of existing departments.

Edit Department

This Permission puts the “Users” option on the menu in the Admin section. This Permission also puts the **Save Department** icon in the department section of the toolbar on the Users page and allows the user to read the details and save changes made to an existing department.

Delete Department

This Permission puts the “Users” option on the menu in the Admin section. This Permission also puts the **Delete Department** icon in the department section of the toolbar on the Users page and allows the user to read the details and to delete existing departments.

Users

Create User

This Permission puts the “Users” option on the menu in the Admin section. This Permission also puts the **New User** icon on the toolbar in the Users page and allows the user to create a new user and read the details of existing users.

If the user is a ServiceDesk Operator then this Permission also puts the “New Contact” button on the create Incident and Change Request page and allows a user to create a new contact when creating an Incident or Change Request.

Edit User

This Permission puts the “Users” option on the menu in the Admin section. This Permission also puts the **Save User** icon on the toolbar in the Users page and allows the user to read the details and save changes made to an existing user.

If the user is a ServiceDesk Operator then this Permission also puts the “Edit Contact Details” button on the create Incident and Change Request page and allows a user to Edit the details of the selected contact when creating an Incident or Change Request.

Delete User

This Permission puts the “Users” option on the menu in the Admin section. This Permission also puts the **Delete User** icon on the toolbar in the Users page and allows the user to read the details and to delete existing users.

Solutions

Create Solution

This Permission adds the “New” option to the menu in the Solutions section and allows the user to create a Solution.

Read Solution

This Permission adds the “Search” and “View All” options to the menu in the Solutions section and allows the user to View a Solution.

Edit Solution

This Permission adds the “Search” and “View All” options to the menu in the Solutions section and allows the user to edit an existing Solution. This permission also allows users to add unpublished Solutions to an item.

Delete Solution

This Permission adds the “Search” and “View All” options to the menu in the Solutions section and allows the user to delete an existing Solution.

Publish Solution

This permission allows the user to publish new solutions.

Note: All solutions will be displayed. Solutions can't be added to an item until they have been published, unless a user has the Edit Solution permission enabled.

Categories

Create Categories

This Permission puts the “Categories” option on the menu in the Admin section and allows the user to create new types.

Edit Categories

This Permission puts the “Categories” option on the menu in the Admin section and allows the user to edit existing types.

Delete Categories

This Permission puts the “Categories” option on the menu in the Admin section and allows the user to delete existing types.

Files

Add Files

This permission adds the “Add Files” button to the item. This permission affects all items.

Delete Files

This permission adds the "Delete" button to each of the files that are associated to the item. This permission affects all items.

Add File Folders

This permission adds the “Create Folder” button to the Add a shared file window. This permission only affects ServiceDesk Operators.

Delete File Folders

This permission adds the “Delete Folder” button to the Add a shared file window. This permission only affects ServiceDesk Operators.

Some of the Special Permissions will override these permissions.

Admin

Edit Notes

This Permission adds the “Edit” and “Delete” buttons next to each not that has been added to an item enabling and Administrator to modify or delete a note that has been added to an Item.

Edit SMTP Options

This Permission puts the “Mail Server Settings” option on the menu in the Admin section and allows the SMTP Options page to be displayed and data saved.

Edit Database Options

This Permission puts the “DB Options” option on the menu in the Admin section and allows the DB Options page to be displayed and data saved.

Edit Permissions

When this Permission is denied a user with permission to edit a company, department or user can view the permissions for the company, department or user but cannot modify them.

Edit Escalations

This Permission puts the “Escalations” option on the menu in the Admin section and allows the user to create, edit and Delete Escalation Rules.

Edit Email Templates

This Permission puts the “Email Templates” option on the menu in the Admin section and allows the user to create, edit and Delete Email Templates for Use in Notification Rules.

Edit Notifications

This Permission puts the “Notifications” option on the menu in the Admin section and allows the user to create, edit and Delete Email Notification Rules.

Edit License Information

This Permission puts the “License” option on the menu in the Admin section and allows the License page to be displayed and data saved.

Edit Status

This Permission puts the “Status” and “Resolution Codes” options on the menu in the Admin section and allows the user to create, edit and Delete Status codes and Resolution codes.

Edit Priorities

This Permission puts the “Priority” option on the menu in the Admin section and allows the user to create, edit and Delete Priority.

Customise Application

This Permission puts the “Customise” option on the menu in the Admin section and allows the Customise Options page to be displayed and data saved.

View all Categories

This Permission allows an Administrator to view all Categories.

View all Companies

This Permission allows an Administrator to view all companies in the Tree view.

View all departments

This Permission allows an Administrator to view all departments in the Tree view.

There are also certain users within NetSupport ServiceDesk that have Special Permissions, these are:

- The contact for an Incident and Change Request
- The “Manager” of the department that contains the contact for an Incident and Change Request
- The “Default Contact” of the company that contains the contact for the Incident or Change Request.

Special permissions can be changed by setting the options on the Customise page.

Create a New Permission Template

A selection of pre-defined permission templates are provided within NetSupport ServiceDesk but there may be occasions where you want to create your own template and apply the template to multiple users.

To Create a New Template

1. Select the Admin tab and click the **Permissions** icon in the toolbar.
2. Click the **New Template** icon in the toolbar, a blank template will be displayed.
3. Enter a name for the template and select the required Permissions.
4. Click **Save**. The new template will be added to the list of existing templates.

Setting Permissions

Permissions can be set at the Defaults, company, department or user level.

Permissions can be set either by using one of the permission templates or by manually setting the individual permissions.

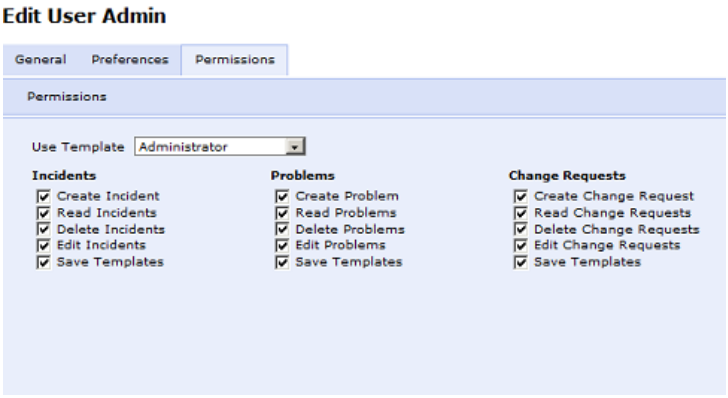
Note: NetSupport ServiceDesk provides a selection of pre-defined permission templates but you can also create your own templates.

When setting manually, each permission can be set to one of three states.

☐ The Permission is not set.

☑ The Permission is set.

☑ or ☐ The Permission is being inherited.



To set Permissions using a template:

1. Select the Admin tab and click the **Users** icon in the toolbar.
2. In the Tree View, select the company, department or individual user to assign permissions to.
3. Select the **Permissions** tab.
4. Select the Template containing the required permissions or enable/disable individual options as required.
5. Click **Save** to apply the Permissions.

To set permissions manually:

1. Select the Admin tab and click the **Users** icon in the toolbar.
2. In the Tree View, select the company, department or individual user to assign permissions to.
3. Select the **Permissions** tab.
4. Set the Required Permissions.
5. Click **Save** to apply the Permissions.

Special Permissions

By default certain users in NetSupport ServiceDesk get additional permissions to some Incidents and Change Requests.

These users are:

- The contact for an Incident or Change Request
- The “Manager” of the department that contains the contact for an Incident or Change Request
- The “Default Contact” of the company that contains the contact for the Incident or Change Request.

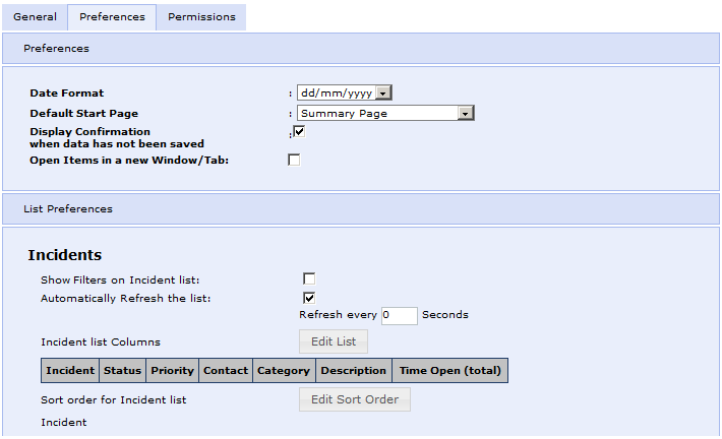
These user are granted the following permissions to the Incidents and Change Requests that they are associated with:

- Read
- Edit
- Delete
- Add Files
- Change the Status
- See the due date

These Special permissions can be removed by setting the special permissions options on the Customise page.

User Preferences

Display preferences can be applied at the company, department or individual user level. For example, the default start page for ServiceDesk Operators could be the Incident list or, for end-users, the create new Incident page.



To set preferences:

1. Select the Admin tab and click the **Users** icon in the toolbar.
2. In the Tree View, select the required company, department or user.
3. Select the **Preferences** tab.
4. The Preferences dialog enables you to specify:
   - An alternative date format, e.g. MM/DD/YYYY or DD/MM/YYYY.
   - The default start page at logon. You can choose a default page or a customised layout.
   - Whether to display a prompt when data has not been saved.
   - Whether to open items in a new window/tab.
   - Whether to show filters when viewing the Incident, Problem, or Change Request list. If enabled, the filters allow you to enter search criteria in order to find specific types of problem.
   - How often the Incident, Problem, or Change Request list should be refreshed.
   - The columns to include in the Incident, Problem, or Change Request list. You can add or remove fields from the Incident, Problem, or Change Request list to suit individual requirements. Click **Edit List** to specify the required columns.

- The sort order for the Incident, Problem, or Change Request list can be customised.

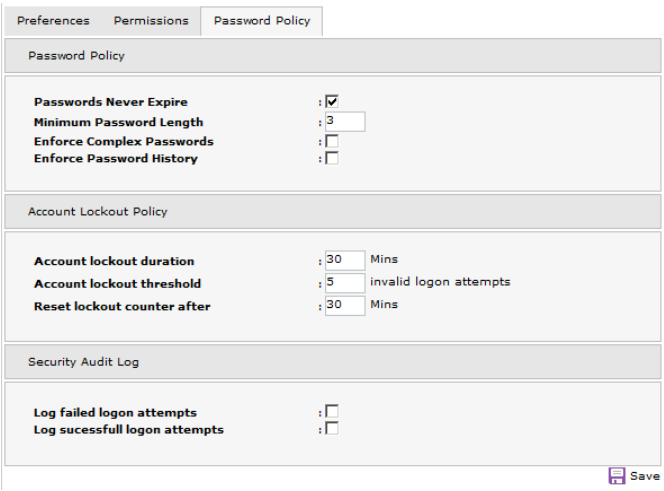
Note: Preferences for the logged-on user can be changed by selecting the Home tab and clicking the **Preferences** icon in the toolbar

Password Policy

The Password Policy tab allows you to configure the settings for user passwords for NetSupport ServiceDesk. You can control what type of passwords can be set, when the password will expire, circumstances for account lockout and what is written to the security log.

To set Password Policies

1. Select the Admin tab and click the **Users** icon in the toolbar.
2. In the Tree View, select Defaults.
3. Select the Password Policy tab.



Password Policy

Allows you to control the type of passwords that can be set and when they will expire.

Passwords Never Expire

If checked the users password will never expire.

Minimum Password Length

Specify the minimum length of a user's password.

Enforce Complex Passwords

When enabled passwords must meet the following requirements:

- Passwords must be at least 8 characters long
- Passwords must not contain the users name
- Passwords must contain at least three of the following
    - Lower case characters
    - Upper case characters
    - Numeric characters
    - Non alphanumeric characters

Enforce Password History

If selected the user can't change their password to one they have previously used.

Number of Passwords to remember

Specify the number of previous passwords to remember when Enforce Password History is being used.

Account Lockout Policy

The Account Lockout Policy settings allow you to control what happens when users try to access NetSupport ServiceDesk with an invalid password. NetSupport ServiceDesk will automatically lock a user out of the system if they try to access it with an incorrect password.

Account lockout duration

Specify the number of minutes the account remains locked out for.

Account lockout threshold

Specify the number of incorrect log on attempts before the account is locked out.

Reset lockout counter after

Specify the amount of time in minutes that the failed log on attempts are remembered for.

Security Audit Log

The Security Audit Log settings control what information is written to the security log.

Log failed logon attempts

If selected all failed log on attempts will be recorded in the security log.

Log Successful logon attempts

If selected all successful log on attempts will be recorded in the security log.

Set Password

To set/reset a user password:

1. Select the Admin tab and click the **Users** icon in the toolbar.
2. In the Users Tree View, select the end-user whose password you want to change.
3. Choose **Reset Password** from the toolbar.



4. Enter the new password and re-type to confirm.
5. Click **Change** to save the details.

To set/reset the password of the logged on user:

1. Select the Home tab and click the **Change Password** icon in the toolbar.
2. Enter the details as above.

Note: You can configure the settings for user passwords. Select the Admin tab, click the **Users** icon, select Defaults from the Tree View and click the **Password Policy** tab.

Import users

You can populate NetSupport ServiceDesk with user information by importing the data from a CSV file or by synchronising NetSupport ServiceDesk with Active Directory.

To Import users from a CSV file:

1. Select the Admin tab and click the **Users** icon in the toolbar.
2. Click on the **Import** toolbar button to open the Import User wizard.
3. Select the file that you want to import and click **Next**.
4. The next page will display a list of fields in the text file, match these to the User Information fields in NetSupport ServiceDesk.
5. Click **Next** to start importing the users.
6. Once the Import is complete, any users that could not be imported and any import errors can be viewed by clicking **Next**.

When importing from a text file if the company and department names listed in the text file do not exist in the NetSupport ServiceDesk database these will be automatically created.

Active Directory Synchronisation:

1. Select the Admin tab and click the **Active Directory Sync** icon in the toolbar.
2. Turn synchronisation on by checking enabled and entering the appropriate domain, user name and password.
3. Click **Add**.
4. Repeat the process for any additional domains.

On a daily basis NetSupport ServiceDesk runs a service that checks the configured Domains for users and adds or updates the details in the Users tree.

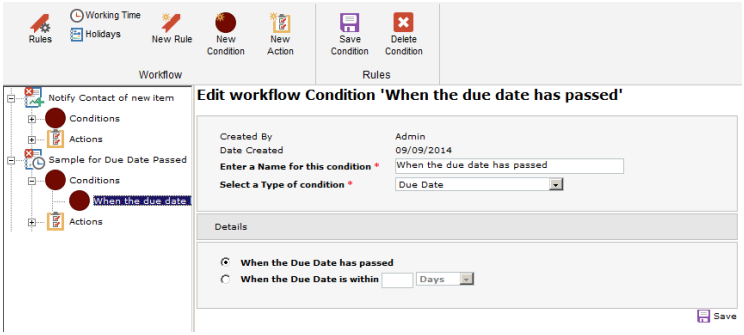
Workflow Rules

The Workflow option enables you to automate service desk processes and allocate work items. Workflow Rules can be defined for Incidents, Problems and Change Requests and can be used to perform a set of specified actions when certain conditions are met.

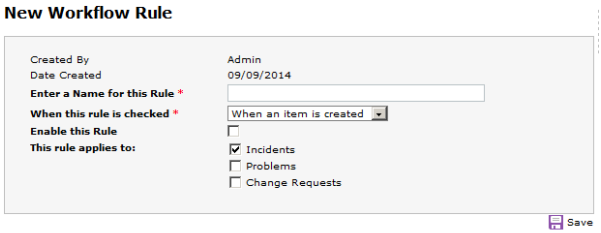
You may decide that simply increasing the priority is sufficient; you could issue an automated email notification to relevant parties, re-assign the item, change a value or create a new item.

To create a new Workflow rule

1. Select the Admin tab and click the **Rules** icon in the Workflow section of the toolbar. Any existing rules that you have created will be displayed in the Tree view.



2. Click the **New Rule** toolbar button.



3. Enter a name for the new rule, then choose when you want the rule checked:

   Continually
   The rule will be continually checked. you have the option to run this rule once per item.

Note: Sufficient conditions will need to be set to stop the rule being re-applied once the action has been taken.

Example rule:
Due date passed
A rule is created to increase the priority of the item when the due date has passed. To stop the rule being re-applied, set a condition so the rule will only be run when the item status is open. an action to change the status will also need to be set.

When an item is created
The rule is run when an item is created.

Example rule:
New User
A rule is set up to automatically create and assign items when an Incident is created with a category of New User. Change Requests can be created: for example, one for a new PC and one for a new phone. An Incident can also be created for a user account to be set up and the original Incident status can be set to complete.

When an item is updated
The rule is run every time an item is updated.

Example rule:
Priority Change
A rule can be created so when a priority is changed to high, an email can be sent to the department manager.

4. Decide if you want to enable the rule immediately.

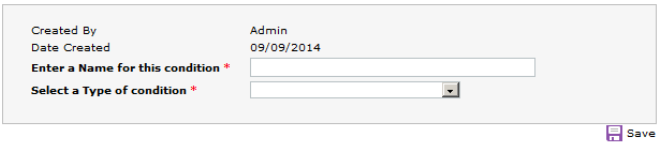
Note: Before enabling the rule, you need to ensure all conditions and actions have been set.

5. Select what to apply the rule to:
   - Incidents
   - Problems
   - Change Requests
6. Click **Save**.

Add a condition to a Workflow rule

The conditions available are dependant on the type of rule you are using.

1. Select the Workflow rule you wish to apply the condition to.
2. Click the **New Condition** toolbar button.

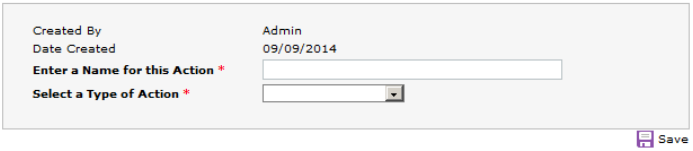


3. Enter a name for the condition.
4. Select the type of condition and enter the required value(s).
5. Click **Save**.

Note: When a rule has been created to check for when items are updated, you can choose to check the current value, enabling the condition to run when any updates are made.

Add an Action to a Workflow Rule

1. Select the Workflow rule that you wish to add the action to.
2. Click the **New Action** toolbar button.



3. Enter a name for the new action.
4. Select the type of action. You can set or increase the priority, issue an automated email notification, reassign the item or create a new item.
5. Click **Save**.

Note: You can define the working hours and holidays for your service desk. When rules are processed, the NetSupport ServiceDesk working hours will be taken into account. In the Admin tab, select the **Working Hours** or **Holidays** icon to configure these settings.

Service Level Agreements

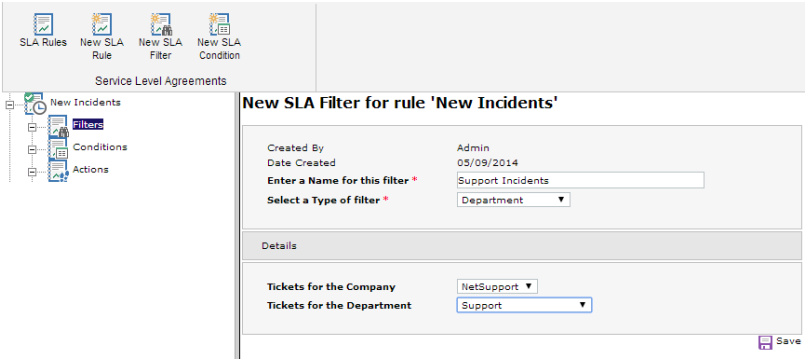
Service Level Management is a core component of the ITIL service delivery framework and NetSupport ServiceDesk provides optimised workflow processes to ensure Service Level Agreements (SLAs) can be developed, agreed and successfully managed in line with customer needs.

SLA rules can be defined for Incidents, Problems and Change Requests and can be used to see that agreed timescales are being met. You can filter SLA rules for specific items, for example, you may want the SLA rules to apply to Incidents that the Support department raise but not Incidents that the Marketing department raise.

Once you have created your SLA rule and applied a filter and a condition. Any Incidents, Problems or Changes Requests that meet the rule conditions will have a SLA section added to the item showing the due date and the time remaining on the item.

To create a new SLA rule

1. Select the Admin tab and click the **SLA** icon in the Workflow section of the toolbar. Any existing rules that you have created will be displayed in the Tree view.



2. Click the **New SLA Rule** icon in the toolbar.
3. Enter a name for the new rule and then choose if you want the rule to be only run once per item.
4. Decide if you want to enable the rule immediately.

   Note: Before enabling the rule, you need to ensure all filters and conditions have been set.
5. Select what to apply the rule to:

- Incidents
- Problems
- Change Requests

6. Click **Save**.

Add a filter to a SLA rule

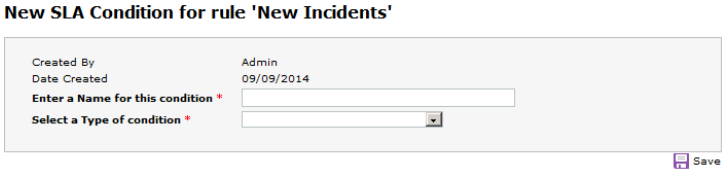
1. Select the SLA rule you wish to apply the filter to.
2. Click the **New SLA Filter** icon in the toolbar.



3. Enter a name for the filter.
4. Select the type of filter from the list. You can filter by: company, department, priority, status or previous SLA rule.
5. Click **Save**.

Add a condition to a SLA rule

1. Select the SLA rule you wish to apply the condition to.
2. Click the **New SLA Condition** icon in the toolbar.



3. Enter a name for the condition.
4. Select the type of condition from the list.
5. Enter the required properties for the condition you have selected.
6. Click **Save**.

Note: You can define the working hours and holidays for your NetSupport ServiceDesk. When rules are processed, the NetSupport ServiceDesk working hours will be taken into account. In the Admin tab, select the **Working Hours** or **Holidays** icon to configure these settings.

Email Templates

NetSupport ServiceDesk enables you to create a library of customised email templates. These provide a useful mechanism for issuing automated notifications to users in a number of different scenarios: for example, when changing the person that a problem is assigned to or when you want to escalate the status of a problem. The rules for where to send a particular template are set in the **Admin** – **Notifications** option and, if creating an email for escalation purposes, you also need to set criteria in the **Admin** - **Workflow** option.

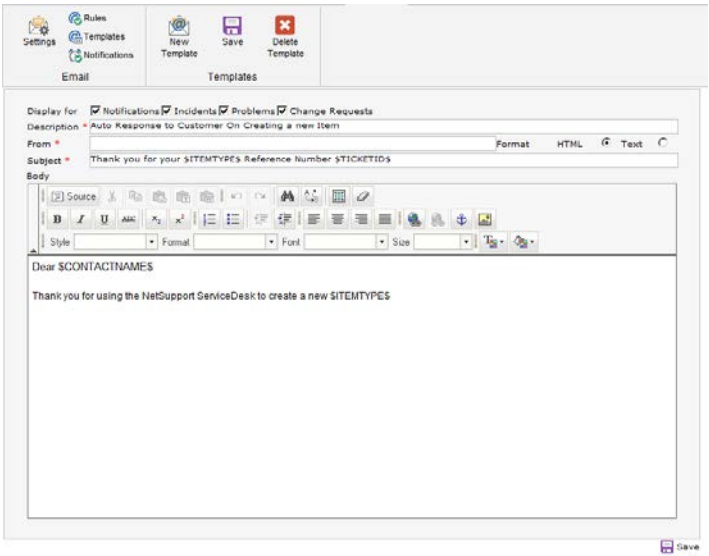
Note: Email templates can also be used when sending an email from an Incident, Problem or Change Request.

To create an email template

1. Select the Admin tab and click the **Templates** icon in the Email section of the toolbar. A list of existing templates will appear. You can edit an item by clicking **Edit** next to the required template.



2. Choose **New Template** from the toolbar.



3. By default, the template will be available for Notifications, Incidents, Problems and Change Requests. Un-check the options you don't want the template to be available for.
4. Enter a brief description for the template, the name of the sender and the subject.
5. Enter the content of the email. Choose whether to send this in HTML or Plain Text format. A selection of variables can be included in order to personalise the email.
6. Click **Save.**

Email Variables

A number of variables can be used in the subject field or message body of an Email Template. When the Email is sent the variable is replaced by the details from the item.

Variable	Description
$APPNAME$	The name of the application as configured in the customise option.
$CREATORNAME$	The full name of the person that created the item.
$CREATOREMAIL$	The email address of the person that created the item.
$CONTACTNAME$	The full name of the contact for the item.
$CONTACTEMAIL$	The email address of the contact for the item.
$CONTACTDEPT$	The department of which the item contact is a member.
$CONTACTCOMP$	The company of the items contact.
$CONTACTPHONE$	The contacts phone number.
$ASSIGNEENAME$	The full name of the current assignee of the item.
$ASSIGNEEEMAIL$	The email address of the current assignee of the item.
$ASSIGNEEPHONE$	The phone number of the current assignee of the item.
$ASSIGNEECELL$	The cell phone number of the current assignee of the item.
$ASSIGNEEDEPT$	The department of which the current assignee of the item is a member.
$ASSIGNEECOMP$	The company of the current assignee of the item.
$TICKETID$	The item number.

$TICKETURL$	The URL to the item.
$STATUS$	The current status of the item.
$PRIORITY$	The current priority of the item.
$DUEDATE$	The current due date of the item.
$CATEGORY$	The current category of the item.
$SOLUTION$	The text of the solution if one has been added to the item.
$DESCRIPTION$	The description of the item. (as entered in the description field of the item)
$SUMMARY$	Includes the item summary text in the email.
$CUSTOMDATAxxx$	You can add as many custom fields to a template as required.
$ALLNOTES$	Includes all notes that have been added to an item in chronological order.
$LASTNOTE$	Only includes the latest note to be added to the item.
$RESOLUTION$	Includes the resolution code for the item.
$CONTACTCELL$	The contacts cell number.
$ITEMTYPE$	The item type; Incident, Problem or Change Request.
$DATECREATED$	The date the item was created.

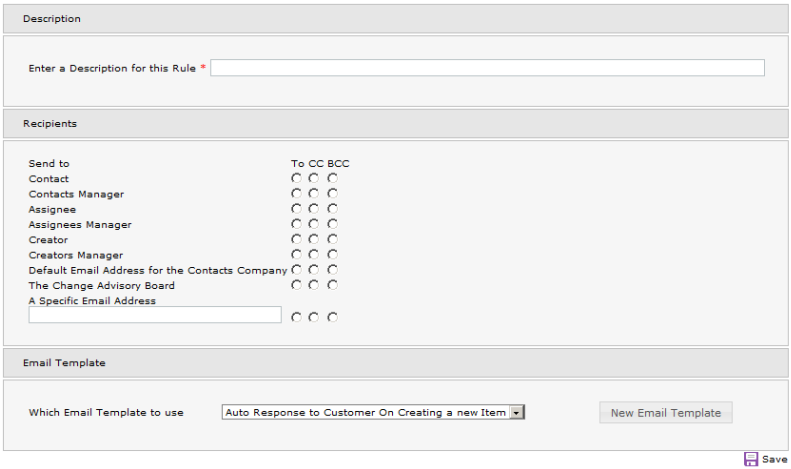
Notifications

Use this option to set the rules for where a stored email template should be sent.

To set Notification rules

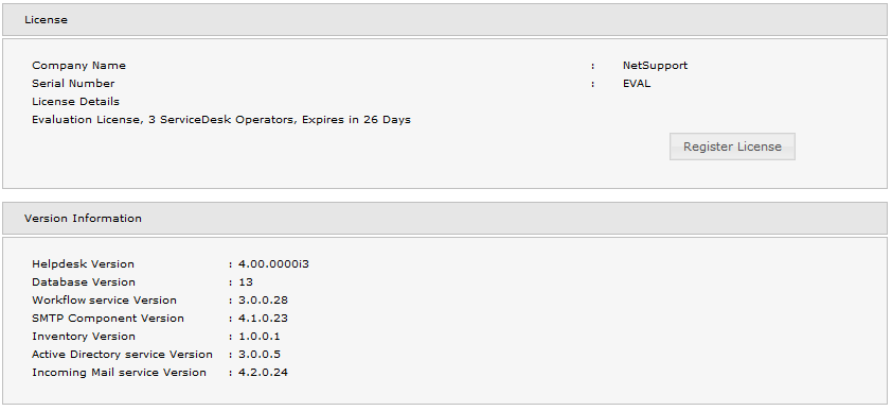
1. Select the Admin tab and click the **Notifications** icon in the toolbar. A list of existing notifications will appear. You can edit an item by clicking in one of the columns.
2. Choose **New Rule** from the toolbar.
3. Enter a suitable description for the Notification.
4. Indicate whom the email should be sent too by checking the appropriate Recipient button.
5. Select the required email template to send. To create a new email template click **New Email Template**.
6. Click **Save** to store the notification.

Note: When setting an Action in Workflow you can define when and what email Notification is sent and create a new email Notification if required.



License

The Licensing page enables an administrator to view the Current license and to enter a new License.



The following License modes are available:

Eval

The 30 day eval license limits users to 2 ServiceDesk Operators and 50 end-users.

Per Operator

In this mode the Product is limited to allow a limited number of technical staff. If the product is licensed this way and the license limit is reached no more technical staff can be created.

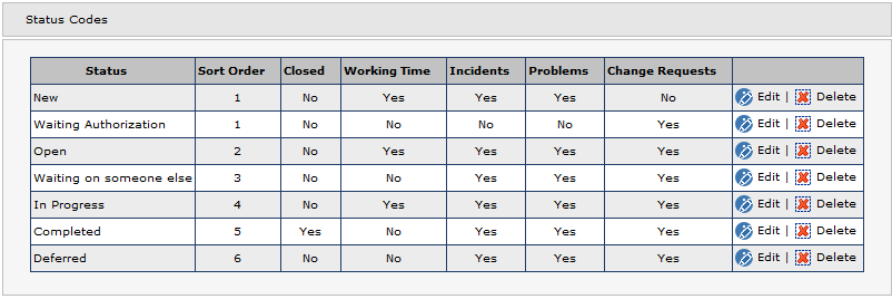
Status

Status codes provide an indicator as to the progress of Incidents, Problems and Change Requests and enable quick identification of any outstanding items that may require escalating. When a new Item is raised it is automatically given a Status of new. When any subsequent action is taken the Status can be changed to reflect the current state of play.

NetSupport ServiceDesk provides a default list of codes but you can add to these if required.

To add a new Status Code:

1. Select the Admin tab and click the **Status** icon in the toolbar.
2. Click the **New** icon.
3. Enter a description for the Status.
4. Decide which position in the Status list the new code should appear.
5. Indicate if the system should treat the Status as 'Closed', i.e. Completed. Any item that is then assigned the Status will be removed from the item list.
6. Decide if the time in this Status should be used to calculate the working time.
7. Select what to use this Status for:
   - Incidents
   - Problems
   - Change requests
8. Decide if this should be the default Status for Incidents, Problems or Change Requests.
9. You can pre-define what this Status code can be changed to by assigning codes to it, all codes are assigned by default. You can then specify what these Statuses can be changed to by adding items to the Assigned list.



Status Codes

Status	Sort Order	Closed	Working Time	Incidents	Problems	Change Requests	
New	1	No	Yes	Yes	Yes	No	Edit | Delete
Waiting Authorization	1	No	No	No	No	Yes	Edit | Delete
Open	2	No	Yes	Yes	Yes	Yes	Edit | Delete
Waiting on someone else	3	No	No	Yes	Yes	Yes	Edit | Delete
In Progress	4	No	Yes	Yes	Yes	Yes	Edit | Delete
Completed	5	Yes	No	Yes	Yes	Yes	Edit | Delete
Deferred	6	No	No	Yes	Yes	Yes	Edit | Delete

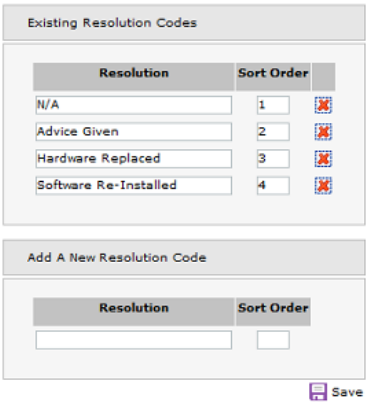
10. Click **Ok**.

To edit the list of Status Codes:

1. Select the Admin tab and click the **Status** icon in the toolbar.
2. Click **Edit** next to the required Status code.
3. Edit the required details.
4. A Status can be removed by clicking the **Delete** icon.

Resolution Codes

Use this option to compile a list of resolution codes. When a ServiceDesk Operator closes an item they can choose the appropriate code from the pre-defined list.



To edit the list of Resolution Codes:

1. Select the Admin tab and click the **Resolution** icon in the toolbar. The list of existing Resolution Codes will appear.
2. To edit a Description click in the appropriate field and amend the text as required.
3. Choose the order in which you want the items displayed. This is the order they will appear in the drop down list that appears on the item window.
4. A Resolution can be removed by clicking the **Delete** icon.
5. Click **Save**.

To add a new Resolution Code:

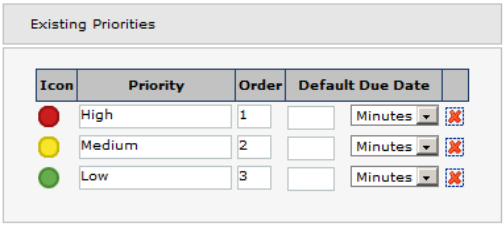
1. Enter the Description.
2. Decide which position in the list the new code should appear.
3. Click **Save**.

Priority Codes

When items are created the initiator will assign a priority to the problem. This is selected from a pre-defined list that can be customised to suit personal requirements.

To edit the Priority Codes:

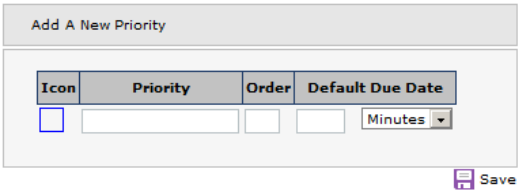
1. Select the Admin tab and click the **Priority** icon in the toolbar. The list of existing Priorities will appear.



2. You can change, or delete, an existing item by clicking in the appropriate column and selecting a new icon or amending the text as required.

   or

   To add a new Priority, click in the appropriate column, select one of the pre-defined icons, enter a description and the order that you would like the new priority to appear in the drop down list.



3. You can define a default due date for each Priority, by entering a time period from 1 minute to 9999 days.
4. Click **Save**.

Categories

This option gives you the opportunity to consider the types of problem that end-users are likely to raise and enables you to compile a list of categories. A hierarchical tree view lists the various categories that have been created. A default set of categories is provided by NetSupport but you can add to these as required.

The tree view expands beneath a main topic description, for example, the generic term Hardware. You can then add sub-type descriptions, PC, Printer etc, within each category.

When an Item is raised, the initiator can select the appropriate category of problem from your pre-defined list.

To create a New Category

1. Select the Admin tab and click the **Categories** icon in the toolbar.
2. Click **New**.
3. If adding a new sub-category to an existing item in the Tree View, you can part complete the category properties by expanding the Tree and highlighting the appropriate level. If it is not a sub-category you can clear the field by selecting the blank option from the drop down list.
4. Having chosen the area of the tree in which to insert the new category, enter a description.
5. Set the default priority for Items of this type.
6. Items in each category can be arranged in a specific order by entering a Sort Order value. For example, if you have four sub-categories within the Hardware/PC category they can be numbered 1 to 4.
7. Select what this category should be displayed for; Incidents, Problems and Change Requests.
8. Items can be assigned to specific departments or Operators based on the category selected.
9. By default, all Operators will have access to a category. This can be restricted by selecting the Operators tab and specifying which Operators can access the category.
10. If this category is displayed for Change Requests a Change Advisory Board tab will appear. This allows you to specify who needs to authorise a Change Request before it can be approved.
11. Click **Save** to add the new category to the Tree.

Custom Data

NetSupport ServiceDesk provides the most commonly used fields to store information about each Item such as its Status, Priority, Due Date etc. However, there may be other information that you wish to store against an Item, for example you may want to add a field for the employee's payroll number.

The Custom Data editor within NetSupport ServiceDesk provides you with a means to add additional fields, sections and new tabs to an Incident, Problem, Change Request, company, department and user that can then be completed either by the end-user or the ServiceDesk Operator.

Custom data fields are organised into sections similar to the other pages displayed in the NetSupport ServiceDesk. Each field or section can be set to be displayed either on the create Item form, the edit Item form or both.

Custom data fields can be set to be displayed to individual users or ServiceDesk Operators only and also be viewed only on certain Categories.

To create your custom data layout start the Custom Data Editor by selecting the Admin tab and clicking the **Custom Data** icon in the toolbar.

Custom Data Editor

The Custom Data editor allows you to create custom data sections, fields and create new tabs that can be displayed on the create Item form, the edit Item form or both.

Using the Custom Data Editor you can:

- Create or edit custom data sections
- Create or edit a text box
- Create or edit a check box
- Create or edit a drop down list
- Create or edit a text area
- Create or edit a Tab

Once you have created the layout of the custom data fields you can then preview how the fields will appear on the forms for a user and a ServiceDesk Operator.

To make the Custom data fields visible you need to click the **save** button to save the custom data layout.

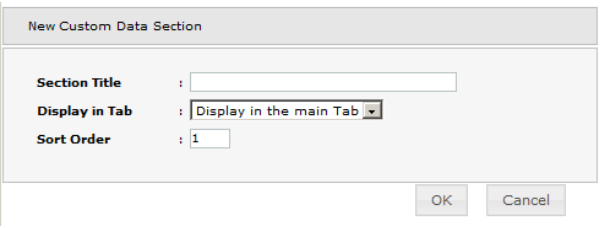
Create Section

Before you can create any new fields, you must first create a custom data section.

Sections are provided to group together similar fields.

To create a new section:

1. In the Custom Data Editor, click the **Section** icon on the toolbar to display the Section box properties.



2. Set the Section Properties and click **OK**.

To edit an existing section:

1. Click on the **properties** button to the right of the section title of the section you want to edit.
2. Set the properties of the Section and click **OK**.

Section properties

Section Title

This is the Title that is displayed above the section.

Display in Tab

Select which tab you would like the section displayed in.

Sort Order

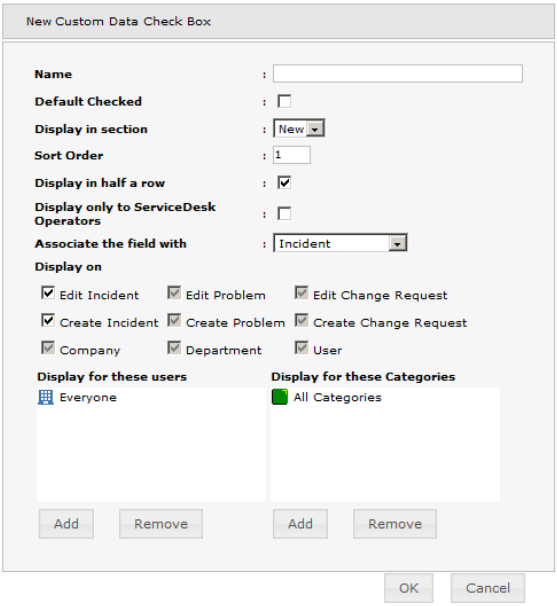
This is a number and controls the order that this section is displayed if you have more that one section.

Create check box

Before you can create a new check box, you must create a custom data section.

To create a new check box:

1. In the Custom Data Editor, click the **Check Box** icon on the toolbar to display the check box properties.



2. Set the check box properties and click **OK**.

To edit an existing check box:

1. Click on the **Properties** button to the right of the field you want to edit.
2. Set the properties of the check box and click **OK**.

Check box properties

Name

This is the name that will be displayed to the left of the field. This name is also the name displayed in the column title of an Item list.

Default Checked

When this option is checked the Default value for the field is checked.

Display in section

This is the name of the custom data section to which this check box will be added.

Sort Order

This is a number and controls the order in which this field is displayed in the selected section.

Display in Half row

When this option is checked, the field will be displayed as half a row and another field will be displayed to the right of it.

Display only to ServiceDesk Operators

When this option is checked, the field will only be displayed if the logged on user is a ServiceDesk Operator.

Associate the field with

To specify what to associate the field with, you can choose from Incident, Problem, Change Request, contact, department or company.

Display on:

Choose which forms the custom data will be displayed on. The options available will depend on what you have associated the field with.

Edit Incident

When checked, the field is displayed on the Edit Incident form.

Edit Problem

When checked, the field is displayed on the Edit Problem form.

Edit Change Request

When checked, the field is displayed on the Edit Change Request form.

Create Incident

When checked, the field is displayed on the Create Incident form.

Create Problem

When checked, the field is displayed on the Create Problem form.

Create Change Request

When checked, the field is displayed on the Create Change Request form.

Company

When checked, the field is displayed on the Edit Company form.

Department

When checked, the field is displayed on the Edit Department form.

User

When checked, the field is displayed on the Edit User form.

Display for these Users

You can specify which users this field is displayed to. By default, it will be displayed to all users.

Display for these Categories

You can specify which categories this field will be displayed on. By default, it will be displayed on all category types.

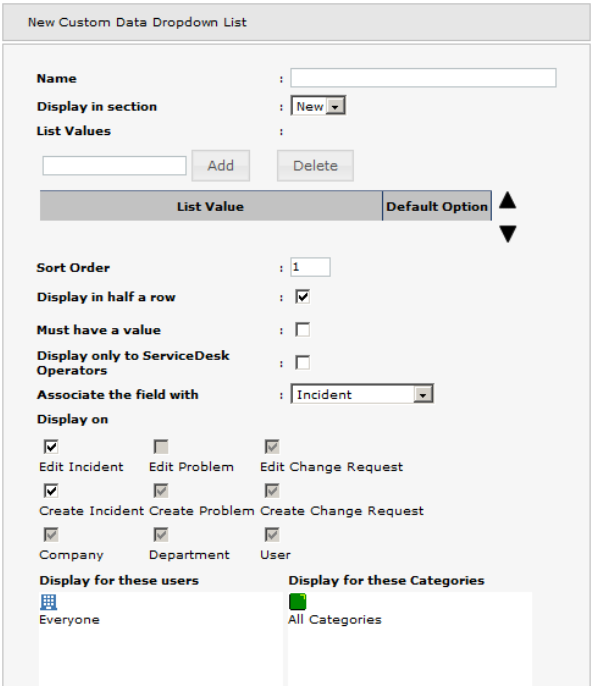
Note: If you have associated the field with a company, department or contact the display for these users and categories options will not be displayed.

Create drop down list

Before you can create a new drop down list, you must create a custom data section.

To create a new drop down list:

1. In the Custom Data Editor click the **Drop Down List** button on the toolbar to display the drop down list properties.



2. Set the drop down list Properties and click **OK**.

To edit an existing drop down list:

1. Click on the **Properties** button to the right of the field you want to edit.
2. Set the properties of the drop down list and click **OK**.

Drop down list properties

Name

This is the name that will be displayed to the left of the field. This name is also the name displayed in the column title of an Item list.

Display in section

This is the name of the custom Data Section to which this drop down list will be added.

List Value

You can add values that will appear in the drop down list. The order of the values can be set by selecting a value and using the up and down buttons to re-order the list. One value can be set as the default value and will be selected by default.

Note: A blank value can be entered, if this is set as the default option and the Must have value option is also selected the user must enter a value from the drop down list.

Sort Order

This is a number and controls the order in which this field is displayed in the in the selected section.

Display in Half row

When this option is checked, the field will be displayed as half a row and another field will be displayed to the right of it.

Must have a Value

When this option is checked the drop down list will not contain an empty value.

Display only to ServiceDesk Operators

When this option is checked, the field will only be displayed if the logged on user is a ServiceDesk Operator.

Associate the field with

To specify what to associate the field with, you can choose from Incident, Problem, Change Request, contact, department or company.

Display on:

Choose which forms the custom data will be displayed on. The options available will depend on what you have associated the field with.

Edit Incident

When checked, the field is displayed on the Edit Incident form.

Edit Problem

When checked, the field is displayed on the Edit Problem form.

Edit Change Request

When checked, the field is displayed on the Edit Change Request form.

Create Incident

When checked, the field is displayed on the Create Incident form.

Create Problem

When checked, the field is displayed on the Create Problem form.

Create Change Request

When checked, the field is displayed on the Create Change Request form.

Company

When checked, the field is displayed on the Edit Company form.

Department

When checked, the field is displayed on the Edit Department form.

User

When checked, the field is displayed on the Edit User form.

Display for these Users

You can specify which users this field is displayed to. By default, it will be displayed to all users.

Display for these Categories

You can specify which categories this field will be displayed on. By default, it will be displayed on all category types.

Note: If you have associated the field with a company, department or contact the display for these users and categories options will not be displayed.

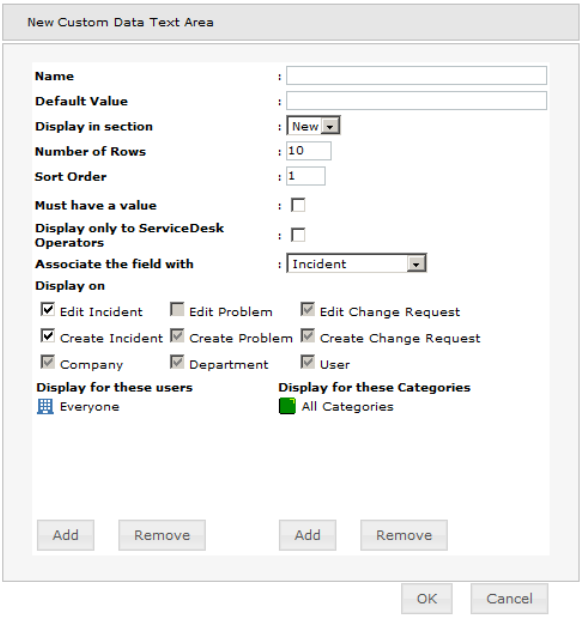
Create text area

A text area is similar to a text box but a text area allows the user to enter more than one line of text similar to the description field on an Item.

Before you can create a new text area, you must create a custom data section.

To create a new text area:

1. In the Custom Data Editor click the **Text Area** icon on the toolbar to display the text area properties.



2. Set the text area Properties and click **OK**.

To edit an existing text area:

1. Click on the **Properties** button to the right of the field you want to edit.
2. Set the properties of the text area and click **OK**.

Text area properties

Name

This is the name that will be displayed to the left of the field. This name is also the name displayed in the column title of an Item list.

Default Value

You can specify a default value for the text area; this will also be displayed when the value is empty.

Display in section

This is the name of the custom Data Section to which this text area will be added.

Number of Rows

This is the number of lines of text that will be displayed in the text area. The text area will allow the user to enter more than this number of rows and a scroll bar will be displayed on the text area.

Sort Order

This is a number and controls the order in which this field is displayed in the selected section.

Must have a Value

When this option is checked the text area will not contain an empty value. When not checked the text area will contain an empty value.

Display only to ServiceDesk Operators

When this option is checked, the field will only be displayed if the logged on user is a ServiceDesk Operator.

Associate the field with

To specify what to associate the field with, you can choose from Incident, Problem, Change Request, contact, department or company.

Display on:

Choose which forms the custom data will be displayed on. The options available will depend on what you have associated the field with.

Edit Incident

When checked, the field is displayed on the Edit Incident form.

Edit Problem

When checked, the field is displayed on the Edit Problem form.

Edit Change Request

When checked, the field is displayed on the Edit Change Request form.

Create Incident

When checked, the field is displayed on the Create Incident form.

Create Problem

When checked, the field is displayed on the Create Problem form.

Create Change Request

When checked, the field is displayed on the Create Change Request form.

Company

When checked, the field is displayed on the Edit Company form.

Department

When checked, the field is displayed on the Edit Department form.

User

When checked, the field is displayed on the Edit User form.

Display for these Users

You can specify which users this field is displayed to. By default, it will be displayed to all users.

Display for these Categories

You can specify which categories this field will be displayed on. By default, it will be displayed on all category types.

Note: If you have associated the field with a company, department or contact the display for these users and categories options will not be displayed.

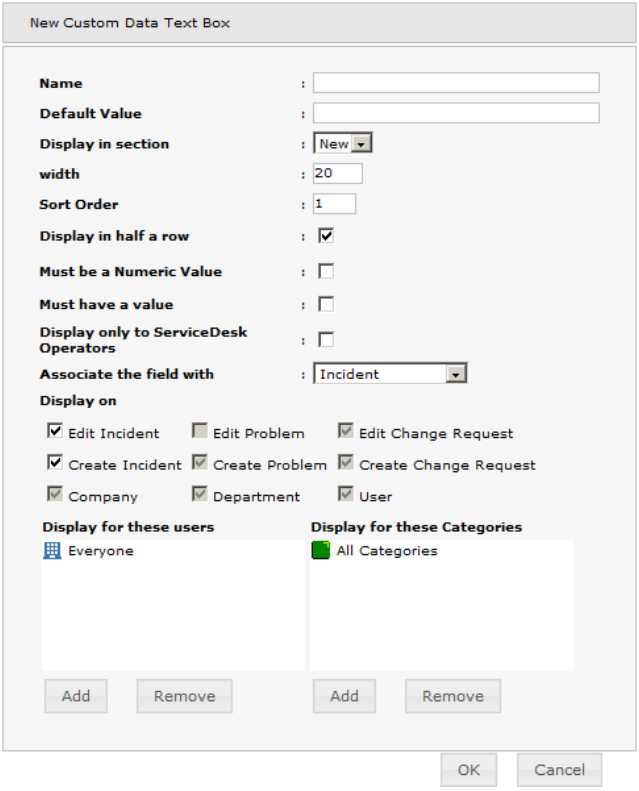
Create text box

A text area is a single line input box that can be used to enter alphanumeric data. A text box can be set to only allow a number to be entered.

Before you can create a new text box, you must create a custom data section.

To create a new text box:

1. In the Custom Data editor, click the **Text Box** icon on the toolbar to display the text box properties.



2. Set the text box Properties and click **OK**.

To edit an existing text box:

1. Click on the **Properties** button to the right of the field you want to edit.
2. Set the properties of the text box and click **OK**.

Text box properties

Name

This is the name that will be displayed to the left of the field. This name is also the name displayed in the column title of an Item list.

Default Value

You can specify a default value for the text box; this will also be displayed when the value is empty.

Display in section

This is the name of the custom data section to which this text box will be added.

Width

This is the number of lines of text that will be displayed in the text box. If the user enters more than this number of lines, a scroll bar will be displayed on the text box.

Sort Order

This is a number and controls the order in which this field is displayed in the selected section.

Display in Half row

When this option is checked, the field will be displayed as half a row and another field will be displayed to the right of it.

Must be a Numeric value

When this option is set, the text box will only allow numeric characters to be entered.

Must have a Value

When this option is checked, the text box will not contain an empty value.

Display only to ServiceDesk Operators

When this option is checked, the field will only be displayed if the logged on user is a ServiceDesk Operator.

Associate the field with

To specify what to associate the field with, you can choose from Incident, Problem, Change Request, contact, department or company.

Display on:

Choose which forms the custom data will be displayed on. The options available will depend on what you have associated the field with.

Edit Incident

When checked, the field is displayed on the Edit Incident form.

Edit Problem

When checked, the field is displayed on the Edit Problem form.

Edit Change Request

When checked, the field is displayed on the Edit Change Request form.

Create Incident

When checked, the field is displayed on the Create Incident form.

Create Problem

When checked, the field is displayed on the Create Problem form.

Create Change Request

When checked, the field is displayed on the Create Change Request form.

Company

When checked, the field is displayed on the Edit Company form.

Department

When checked, the field is displayed on the Edit Department form.

User

When checked, the field is displayed on the Edit User form.

Display for these Users

You can specify which users this field is displayed to. By default, it will be displayed to all users.

Display for these Categories

You can specify which categories this field will be displayed on. By default, it will be displayed on all category types.

Note: If you have associated the field with a company, department or contact the display for these users and categories options will not be displayed.

Create Tab

A tab can be created to display fields on a new tab in the Create and Edit forms; a section needs to be created before fields can be added.

To create a new Tab

1. In the Custom Data Editor select the **Tab** button on the toolbar to display the tab properties.



2. Set the tab properties and click **Ok**.

To edit an existing Tab

1. Click the properties to the right of the tab you want to edit.
2. Set the properties of the tab and click **Ok**.

Tab Section Properties

Tab Title

This is the name that will be displayed on the new tab.

Sort Order

This is a number and controls the order that this section is displayed if you have more that one section.

Viewing and entering custom data

Once you have used the Custom Data Editor to create and save a custom data layout, the custom data fields will be displayed on the Create Incident, Problem or Change Request form or the Edit Incident, Problem, Change Request, Company, Department or User form dependant on the properties that have been set.

When adding Custom fields these will be displayed on the main tab on the Edit and Create forms, unless you have created a new tab for the fields to be displayed in.

Customise

This option enables you to customise a number of NetSupport ServiceDesk's default settings.

The customise options are split into three sections

- Item options
- Logon options
- Appearance

Note: You can create a customised layout for a user's start page in this section. Click the **Layouts** icon in the toolbar.

To change the customise options

1. Select the Admin tab and click the **Customise** icon in the toolbar.
2. Change the options as required.
3. Press the **Save** button to save the changes.

To add additional languages

NetSupport ServiceDesk provides multi-language support, enabling you to customise the interface by adding additional languages.

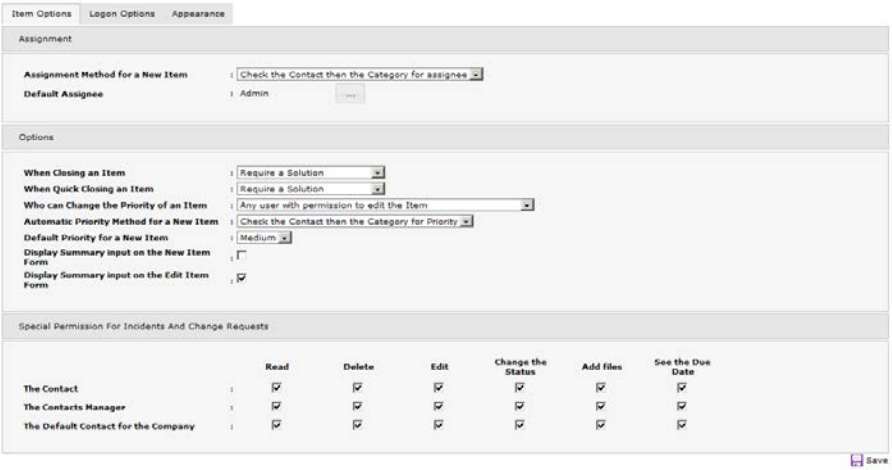
Note: Additional languages can also be selected during installation.

1. Click the **Languages** icon on the Toolbar.
2. Select the required language(s) for the NetSupport ServiceDesk interface.
3. Click **Next**. A message will confirm that the database has been created.
4. Click **Close**.
5. To switch between languages, select the Home tab and click the language identifier. A list of available languages will be displayed.

Note: Users can also select the language for NetSupport ServiceDesk from the Logon screen.

Item Options

To access these options select the Admin tab and click the **Customise** icon in the toolbar.



Assignment

Assignment Method for New Item

This option affects how Items are assigned and can be set to one of the following options:

- ***Check the Contact then the Category for assignee***

  The contact, department and company is checked to find an assignee before checking the Category for an assignee.

- ***Check the Category then the Contact for assignee***

  The three Categories are checked to find an Assignee before checking the contact, department and company.

Default Assignee

Choose a contact to act as the default assignee for the system. If, when an Item is logged, the system cannot automatically direct it to a Technical department or ServiceDesk Operator it assigns the problem to the default user specified here. An Administrative user is provided by NetSupport but you can change this if required.

Options

When Closing Items

This setting controls whether a ServiceDesk Operator is prompted to add a solution when closing an Item. Select one of the three options:

- ***Require a Solution***
  The Operator must add a solution to the Item before it can be closed.

- ***Prompt for a solution***
  The Operator is prompted to add a solution to the Item but can still save the Item without adding a solution.

- ***Do Not Prompt for a Solution***
  The Operator is not prompted to add a solution when an Item is closed.

When Quick Closing an Item

This setting controls whether a ServiceDesk Operator is prompted to add a solution when quick closing an Item. Select one of the three options:

- ***Require a Solution***
  The Operator must add a solution to the Item before it can be closed.

- ***Prompt for a solution***
  The Operator is prompted to add a solution to the Item but can still save the Item without adding a solution.

- ***Do Not Prompt for a Solution***
  The Operator is not prompted to add a solution when an Item is closed.

Who can change the priority of an Item

This option controls which users can change the priority of an Item. This can be set to one of the following:

- Any user with permission to edit the Item
- Any ServiceDesk Operator.
- Only ServiceDesk Operators with the Edit Priorities Permission.

Automatic Priority Method for New Item

When a new Item is created the priority can automatically be set based on the default priority for the user or the default priority for the Item.

The Default Priority for a user can be set by editing the user. The default priority for the Category can be set by editing the Category.

Default Priority for a New Item

Choose a default Priority for new Items. If, when an Item is logged, the system cannot automatically set the priority then this priority will be set. See How the Priority of a new Item is Set.

Display Summary input on New Item

Indicate whether the summary field should appear when creating a new Item. Disabled by default.

Display Summary input on Edit Item

Indicate whether the summary field should appear when editing an Item. Enabled by default.

Special Permissions for Incidents and Change Requests

By default certain users in NetSupport ServiceDesk get additional permissions to some Incidents and Change Requests. These users are:

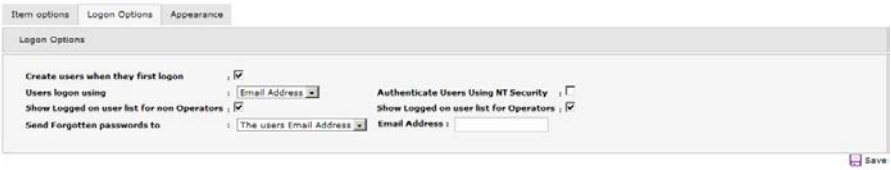
- The contact for an Incident or Change Request
- The “Manager” of the department that contains the contact for an Incident or Change Request
- The “Default Contact” of the company that contains the contact for the Incident or Change Request.

These users are granted the following permissions to the Incidents and Change Requests that they are associated with:

- Read
- Delete
- Edit
- Change the Status
- Add Files
- See the due date

Logon Options

To access these options select the Admin tab and click the **Customise** icon in the toolbar.



Create users when they first logon

By default, users logging on with their Email address for the first time are prompted to create their own end-user account. However, you may want to control the number of accounts being created by disabling this option. This ensures that only existing Administrators or ServiceDesk Operators can create users.

User logon using

By default user's log on using their Email Address and password, this can be changed to one of the following:

- Email address
- NT user name
- Full name

Authenticate Users Using NT Security

When a user directs their browser to NetSupport ServiceDesk they will be prompted to enter a Windows user name and password. If this Windows user name matches the NT logon of a NetSupport ServiceDesk user then the user will be automatically logged on to NetSupport ServiceDesk.

When this option is changed and the settings are saved you will be prompted to enter a windows user name and password to set the IIS configuration.

Show Logged on user list for non-Operators

Disable this option to prevent end-users from viewing the list of logged on users.

Show Logged on user list for Operators

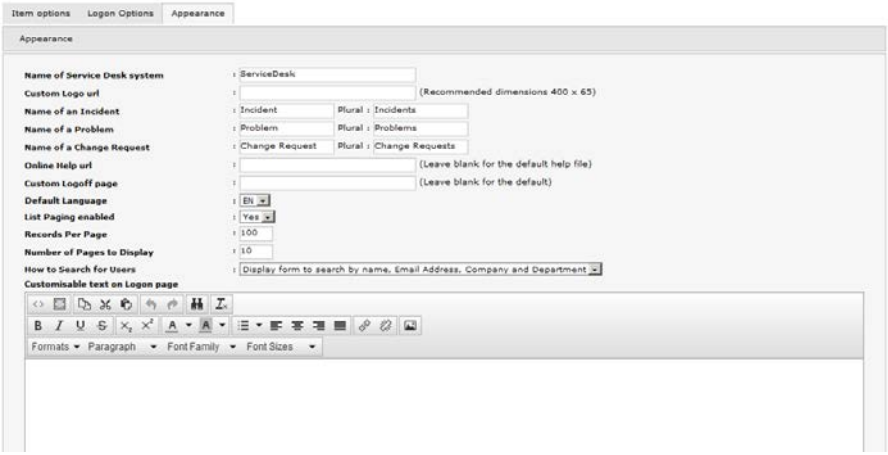
Disable this option to prevent ServiceDesk Operators from viewing the list of logged on users.

Send forgotten passwords to

By default, if a user tries to log on using an incorrect password they are offered a link to send the password to the Email address that is stored in NetSupport ServiceDesk. If you wish you can set this to send this password request to a specific Email address.

Appearance

To access these options, select the Admin tab and click the **Customise** icon in the toolbar.



Name of the NetSupport ServiceDesk System

This is the name that appears in the title bar of the web browser window.

Custom Logo URL

Allows you to select your own logo to be used within NetSupport ServiceDesk. Enter the URL to a custom file.

Note: The recommended dimensions for a logo are 400 x 65 pixels.

Name of an Incident / Problem / Change Request

If the terms used by NetSupport ServiceDesk are not applicable appropriate, you can change them to terms more recognisable within your organisation. For example, you might prefer to call an Incident a Help Request.

Online Help URL

If you don't wish to use the default help file, you can enter a URL to a custom file.

Custom Logoff Page

You can choose to have a custom logoff page displayed when a user logs out of NetSupport ServiceDesk. Enter the required URL.

List Paging Enabled

The number of items listed per page can be controlled when this option is enabled.

Records per Page

With item list paging enabled, you can specify the number of Items to be listed per page.

Number of Pages to Display

Specify the number of pages to be displayed at any one time. If there are more pages, you will be prompted to select 'Next Set'.

How to Search for Users

This option decides how you search for users. You can choose from the following options:

- ***Display hierarchy of companies and departments***

  The default search option searches for users by company and department.

- ***Display form to search by name, email address, company and department***

  A more extensive search option, allowing you to search by name and Email address as well as by company and department.

Customisable Text on the Logon page

You can also specify customisable messages, which appear on the User Logon screen. This could be important system or company information.

USING NETSUPPORT SERVICEDESK

Overview

NetSupport ServiceDesk provides the core Incident, Problem and Change Management functionality as recommended by ITIL:

Incidents

Incidents are records containing Support requests from individuals. Incident Management allows you to resolve issues and restore normal service as quickly and efficiently as possible.

Problems

Problems are the underlying cause of one or more Incidents. Problem Management allows you to find the cause of Incidents and eliminate recurring Incidents.

Change Requests

Method of handling and recording requests for change. Change Management helps you introduce a set of defined methods and procedures for the efficient and prompt handling of Change Requests. A Change Advisory board can be defined for each Category allowing you to specify who needs to authorise the Change Request.

Note: Incidents, Problems and Change Requests can be linked to each other allowing records that are related to each other to be updated at the same time.

When end-users experience technical issues they can submit their Incident, Problem or Change Request, using NetSupport ServiceDesk via their Web Browser.

The List tab is used to administer the items that have been raised. A users permissions will determine whether they have sufficient rights to view and resolve problems.

Before end-users get the chance to log items there are a number of user related admin tasks that should be performed. Refer to the Admin-Users section for more information.

You can change the term Incident, Problem or Change Request to something more appropriate to your organisation using the Customise options.

If users cannot access the web site they can contact an Admin user or ServiceDesk Operator, by phone or e-mail, who will be able to log the problem for them.

How Items are Assigned

Deciding where to assign Incidents, Problems and Change Requests is a key element when configuring your NetSupport ServiceDesk environment. When an end-user logs a problem the system automatically assigns the Item based on rules that have been pre-defined by the Administrator.

Based on the person logging the Item

When an Item is logged the system checks the properties of the initiators company/department to determine which Technical department or ServiceDesk Operator is registered as the assignee for that area.

Based on the type of Item

The type of Item can also determine who problems are assigned to. You may have a person who specialises in a particular application or piece of hardware, in which case you can filter all Items of that type to the specific Operator.

You can specify which of the above rules takes priority in the Admin-Customise option.

Summary Page

By default, the summary page is set as the start page for all users in NetSupport ServiceDesk.

Note: The start page can be changed for users in Preferences. You can choose from a number of default start pages or you can create a custom layout in the Customise section. This allows you to apply specific start pages for different types of users.

This is useful for end-users as it shows the status of the Incidents, Problems, or Change Requests they have raised. The summary page will be displayed in the Home tab. From here, users can quickly create new Incidents, Problems and Change Requests; search the Solutions database to try and identify problems of a similar nature to their own; and change their user details.



fig 1: Summary Page for an end-user

ServiceDesk Operators and Administrators are provided with a categorised summary of the Items assigned to them and their department.

Note: If the start page has been changed and is no longer the Summary page, users can still view this page by clicking the **My Summary** icon in the Home tab.

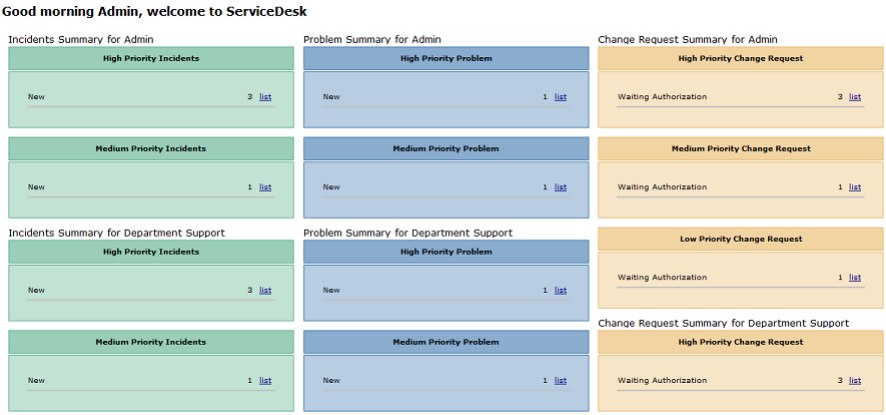
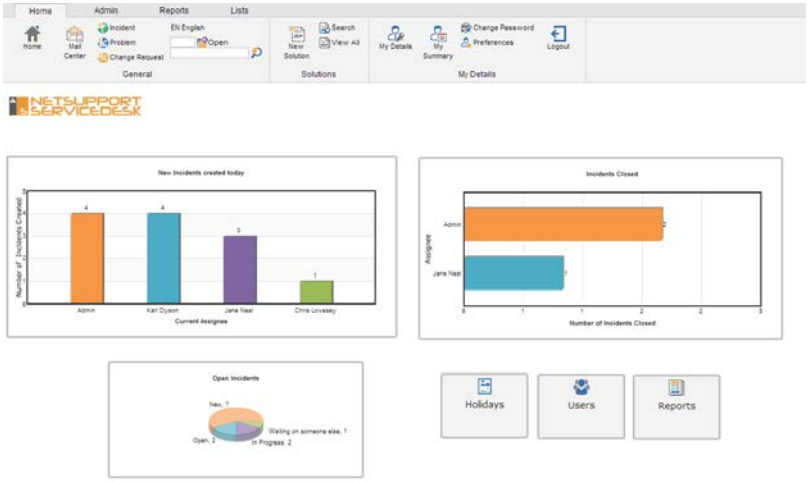


fig 2: Summary Page for ServiceDesk operator/administrators

Layouts

When a user logs into NetSupport ServiceDesk, the default start page is the Summary screen. You can change this to a selection of pre-defined pages or create a customised layout where you can customise the content for individual users, departments or companies. This allows you to have a mixture of information and functions displayed on the start page. For example, you may want an Administrator to see a list of all open Incidents; a graph showing Problems closed this week; a button that links directly to the holiday calendar; and an end-user to see a list of their open Incidents and a link to the company support knowledgebase.

Note: For a new layout to take effect, you must log out of NetSupport ServiceDesk and log back in.



Create a new layout

1. Select the Admin tab in the Toolbar and click the **Layouts** icon.
2. Any existing layouts that have been created will be listed.
3. Click the **New** icon.
4. The layout tools will be displayed. You can choose to include the following tools in the new layout:
   Graph
   HTML
   List
   Summary
   Button

5. Drag the required item from the tools menu into the white space. To resize and position the tool, click the **Size**/**Position** icon in the Toolbar. You can also set the alignment by clicking the appropriate icon in the Toolbar.
6. Click **Properties** to set the properties for the item.
7. Once all the required items are in place, enter a name for the layout. You can choose to hide the toolbar and the right-hand side bar.
8. Click **Save**.
9. Click Preview to view the layout.

Applying layout

1. Select the Admin tab in the Toolbar and click the **Users** icon.
2. Click the company, department or user to apply the layout to.
3. Select the **Preferences** tab.
4. Select the required layout from the drop-down list in the Default Start Page option.
5. Click **Save**.
6. The next time user(s) log into NetSupport ServiceDesk they will see the custom start page.

Item list

The Permissions of the logged on user determine which Incidents, Problems and Change Requests they have access to. End-user's can only view items they have created, ServiceDesk Operators can track items by assignee, department or all, unless restrictions to what Categories they can access have been applied, and Administrators can view everything.

The Item lists can be accessed in a variety of ways:

- When creating user records, set a list to be the default start page in the users Preferences.
- Via the Summary page this can be set as the users default start page or accessed from the Home tab.
- By selecting the Lists tab.



The lists can be sorted by clicking one of the column titles. For example, you might want to sort by time open to highlight those items that have been unresolved the longest.

Closed items can be added to the list by checking the **Show Closed** option.

To view an individual item, click in one of the columns of the required record, excluding the contact column. Clicking the contact column will enable you to send an Email to the user who created the item.

Searches for items can be performed here, select the **Search** icon in the toolbar. You can choose to list saved searches in the right hand side of the Information window allowing quick and easy access to these.

Create New Items

This option is used for logging Incidents, Problems and Change Requests. Although primarily accessed by end-users, if for some reason they cannot open the system, they can ask an Administrator or ServiceDesk Operator to record the details for them.

Ensure the various administrative tasks are in place before allowing users to access NetSupport ServiceDesk. Create your company and department structure; ensure technical departments and ServiceDesk Operators have been given the appropriate permissions. You will also need to decide where problems should be assigned.

First time users

When users attempt to log on to NetSupport ServiceDesk for the first time, they will be prompted for their user details. This includes their company and department which should have been pre-defined by the system administrator. When the details are submitted, they will be directed to the default end-user start page where they can choose to create a new Incident, Problem or Change Request.

Note: The users' default start page can be changed in the Users - Preferences option.

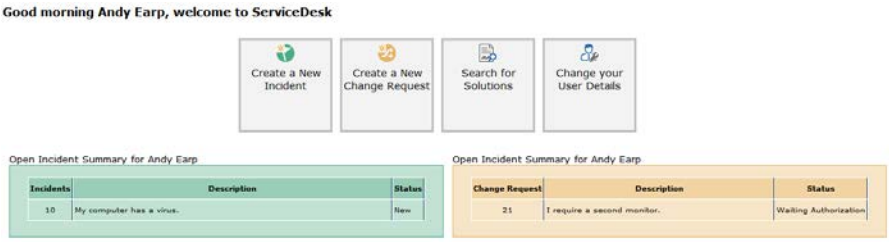


fig 1 - Summary Page

Existing users

Once registered, when users log on with their email address they will be directed to their default start page as defined in their preferences.

Creating a new item

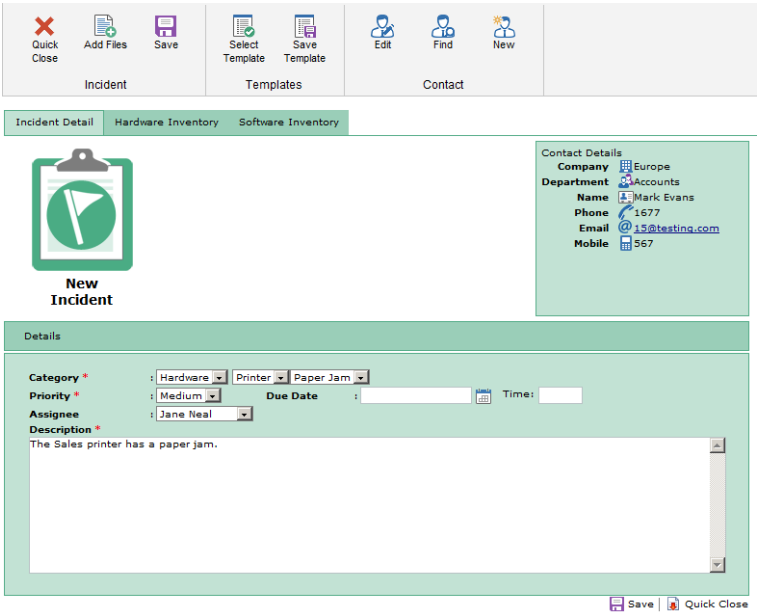


Fig 2 - New Incident Page

1. If the New Incident, Problem or Change Request page is not the user's default start page, select the Home tab and click the **New Incident**, **Problem** or **Change Request** icon in the toolbar, depending on what type of issue you want to raise.

   Note: The Administrator can create a template for the most common problems. The user can then select from a list of templates which will populate the item with pre-defined information.

2. The contact details of the person creating the problem will automatically be registered if the logged on user has 'end-user' permissions.

   Or

   If an Administrator or ServiceDesk Operator is logging the item, the contact details will be blank by default. This caters for occasions when the item is being entered on behalf of an end-user who can't access the system. To indicate the originator of the item, click the **Find** icon on the toolbar to search for the end-user, or click **New** to add a new end-user account to the system.

Note: Problems do not require any contact details to be added, so these options will not be displayed when creating a new Problem.

3. Select the **Category**. The drop down list should already contain suitable choices.
4. Choose the required **Priority**.
5. Enter a resolution **Due Date** and, if required, specify a time.

Note: The working days and hours can be defined for NetSupport ServiceDesk. In the Admin tab, select the **Working Hours** or **Holidays** icon to configure these settings.

6. If logged on as an Administrator or ServiceDesk Operator, select the Operator to assign the item to. This is not required if an end-user is logging the item as the database will already hold the rules for where to assign the item.
7. Enter a description of the item.
8. Files can be added to the item, click **Add Files**.
9. When completed, click **Save**.
10. A confirmation screen will appear providing a reference number and advising where the item has been assigned.

Creating items on behalf of another user

If for any reason an end-user can't access the system, they can ask an Administrator or ServiceDesk Operator to log the problem for them. The item can still be raised in the name of the end-user.

Templates

Templates can be created for Incidents, Problems and Change Requests. This allows an Administrator or ServiceDesk Operators to enter pre-defined information for the most common problems. For example, you can create a template for when a printer runs out of toner or when a user locks themselves out of their account. When creating a new item, users can then select from a list of templates, saving them time.

To create a template

1. From the Home tab, click on Incident, Problem or Change Request.
2. Enter the required information for the item.
3. Click Save Template.
4. Enter a meaningful name for the template and click OK.
5. The template will now be saved.

To use a template

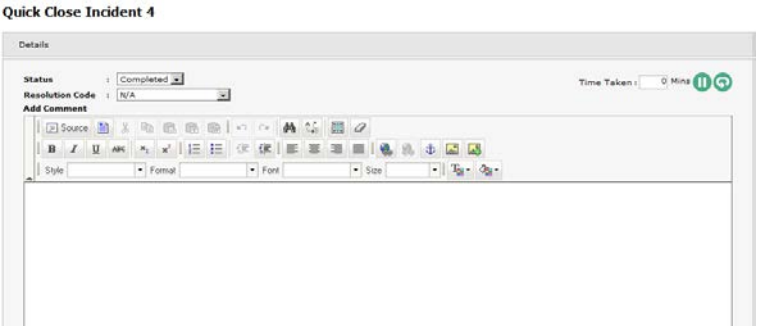
1. From the Home tab, click on Incident, Problem or Change Request.
2. Click Select Template.
3. A list of saved templates will appear. Select the required template.
4. The new Incident, Problem or Change Request will be populated with the pre-defined information in the template.
5. Enter any additional information for the item.

Quick Close

The Quick close feature of NetSupport ServiceDesk allows a ServiceDesk Operator to quickly record a new item and close the item at the same time. This is often useful if a user calls NetSupport ServiceDesk with a problem and the ServiceDesk Operator resolves the problem immediately.

To Quick Close a New Item

1. Create a new item and complete all the required information.
2. Press the **Quick Close** button. This will display the Quick close page.



3. Add a comment if required, this comment will be added to the additional information of the item.
4. Add a Solution by clicking on the toolbar button.
5. The time taken in the editor is displayed this is then added to the total time taken in the item. If required you can pause or reset the timer.
6. Once complete click the Save button. Closed items can still be viewed in the item list by checking the Show Closed option.

How the Priority of a New Item is Set

When a new Item is created the priority is automatically set unless the ServiceDesk Operator selects a specific priority.

To calculate the automatic priority for a new Item, NetSupport ServiceDesk looks at the default priority that can be set for a category or for a user. If a default priority is set for both the user and the category then the setting for the automatic priority method is used to determine the priority.

Tracking Items

Depending on a users permissions, Incidents, Problems and Change Requests can be tracked in the following ways:

- End-users can follow the progress of the items they have created.
- Users that are named as departmental managers can get a breakdown of outstanding items for their department.
- ServiceDesk Operators can see which items are personally assigned to them and their department.
- Administrators can view all items.

The Preferences option enables you to specify the default Start page for each user. When the user logs on they can be directed to either a summary of the outstanding items applicable to them, or taken straight to the item lists.

You can also use the search options available on Home tab to find specific items. You can enter the reference number or use the quick find option to find items of a particular type.

Alternatively, select the Lists tab and use the available options to navigate to the item lists. Closed items can be viewed by selecting Show Closed from the toolbar.

Searching for Items

Users with the Read Incident, Problem or Change Request Permission enabled will have access to a search facility, allowing users to quickly list Incidents, Problems and Change Requests matching certain conditions. For added convenience, frequently used searches can be saved to the toolbar.

To define a search

1. Select the List tab and click the **Search** icon in the toolbar
2. The **New Search** information window will appear. This consists of three tabs:

Criteria

Choose the search type: Incident, Problem or Change Request.

Select the appropriate field on which to base the search.

Click > and apply the required criteria, for example 'is equal to' (click < to remove an item or << to remove all items). Click **Add to Search**.

Repeat the process if multiple conditions are required. You can change the order of items in the list using the up and down arrows or group/un-group items to ensure search actions are performed in the correct sequence.

Field List

Based on the criteria you have specified, you can customise the data fields that are displayed when the search is performed. Click **Change Fields** and add or remove fields as required. Click **Update** to accept the changes.

Properties

If you want to save the search for future use, enter a suitable name for easy access. Saved searches can be listed on the right hand side of the Information window; click **Display on Menu**. You can then choose an icon, add suitable menu text and decide on the sort order for the saved search. Alternatively, saved searches can be retrieved by clicking the **Open** button on the Search toolbar. You can restrict who has access to the search by clicking **Add** and selecting the required users.

3. Click **Save** to store the search when complete.

Note: You also have the option to create a saved search when creating a new report, as new reports are based on a saved search.

Running a search

If **Display on Menu** was selected in the search properties, the saved searches will be listed in the right-hand side of the Information window; simply select the appropriate named search. Alternatively, click the **Open** icon in the toolbar, select the saved search from the list and click the **Go** icon in the toolbar. Items matching the criteria will be listed.

Dealing with Items

A number of tools are available to the assignee to help them diagnose problems and communicate with the end-user. During the life span of an item, assignees can add progress information, send automated email notifications, retrieve a complete Hardware/Software Inventory of the end-user machine, initiate on-line chat sessions and even remotely control the user's desktop.

Note: In order to use the Inventory feature, the DNA Inventory module must be installed. Similarly, to use the remote control capabilities, a third-party Remote Control application must be installed on both the Operator and end-users PC.

Adding/changing information

1. Find the required Incident, Problem or Change Request.

   Either choose from the Item list or Summary page that appears when the Operator logs on.

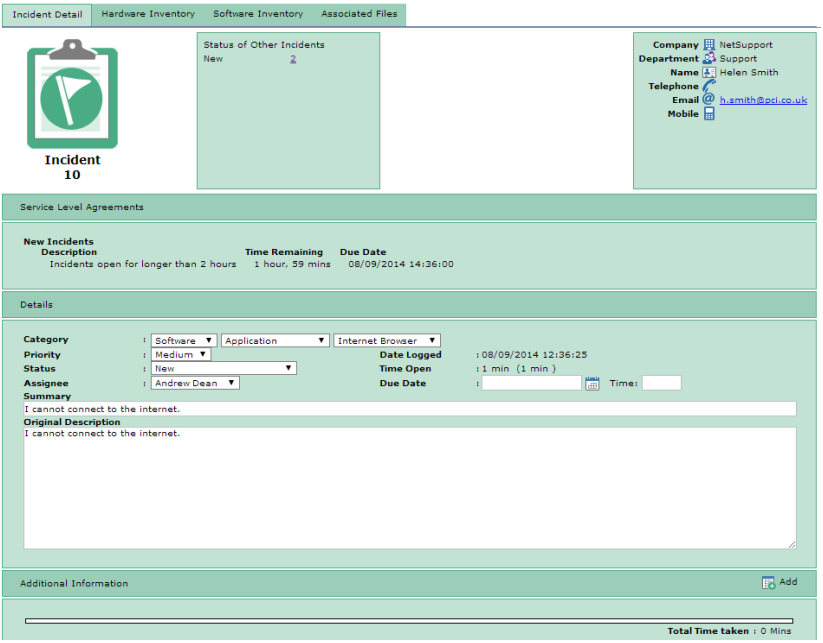
   or

   Enter the reference number, if known, in the Home tab or use the Quick Find feature.

   or

   Select the List tab; a user can view the Incidents, Problems and Change Requests assigned to them or use the Search feature. Administrators and ServiceDesk Operators can view by department and by all.

2. The Information window for the selected item will appear. If the initiator has other outstanding items, the status of these will be also be displayed. If there is a SLA rule that applies to this item, a Service Level Agreement section will be displayed. This will show a description, the due date and the time remaining on the item.



3. Existing information such as the **Priority**, **Status**, **Assignee** and **Due Date** can be changed if required.

Note: You can create automated email notifications, which are triggered if any of these details change.

4. Use the **Additional Information** section of the window to add progress comments. Click **Add** each time you want to insert a new comment or send an email and the NetSupport ServiceDesk Text Editor tool will appear.
5. Files relevant to the item can be added; select Add Files from the toolbar.
6. A history of any changes/updates made is stored. To view this select Audit Trail from the toolbar.
7. While trying to diagnose the problem, it can be useful to remote control the end-users PC or initiate an on-line chat session. If installed on the ServiceDesk Operator and end-user's PCs, NetSupport ServiceDesk can hook into a third-party remote control application.

8. Related Incidents, Problems and Change Requests can be linked together; select Link from the toolbar.

   Note: An icon will appear on the image at the top of the window indicating the item is linked to another. Clicking this takes you to the master item which will display a Linked Items tab.

9. When all required items have been updated, click **Save**.

Note: If a Change Request requires authorisation, only the Change Advisory Board (CAB) members can update the category, priority, status, assignee or due date until the change has been approved by all required members. The current authorisation status is displayed in the Change Request.

Converting Items

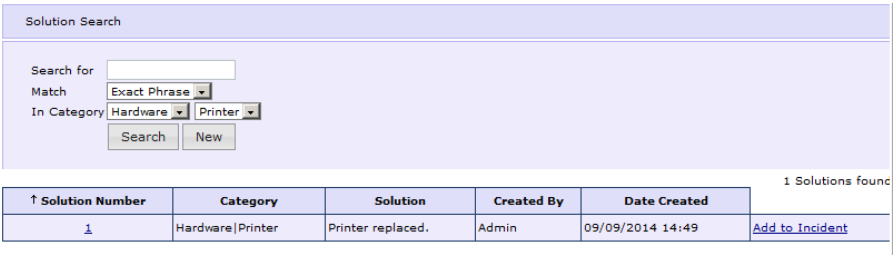
Incidents, Problems and Change Requests can be converted to a different type of item if required.

1. With the item to be converted open, click **Convert to xxxx** at the top of the Information window.
2. The item will change to the selected item type. Items can be converted as many times as you wish.

Closing Items

The procedure for closing an item is as follows:

1. Change the Status to **Completed**.
2. Select the appropriate pre-defined Resolution Code.
3. Each completed Item must have appropriate resolution comments added. The NetSupport ServiceDesk database holds a list of pre-defined **Solutions** and you can select one of these or create a new one. Select **Add Solution** from the toolbar. The Solution Search window will open.



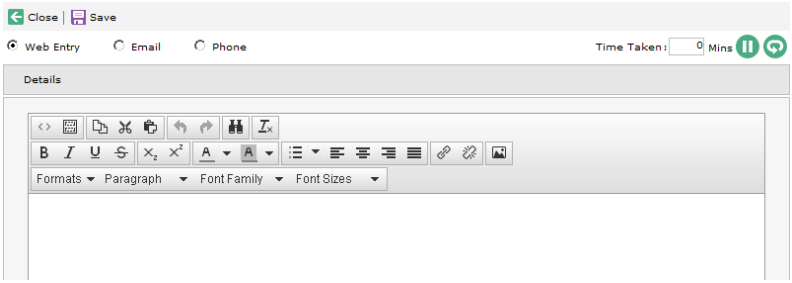
   To find an existing Solution, enter suitable criteria in the search fields and click **Search**. Any matching items will be displayed. Select the required Solution from the list and add any additional comments that may be specific to the Item. Click **Add to xxxx** to apply the Solution.

   If a suitable option does not exist, click **New** and add the relevant details. Choose the appropriate categories and Click **Save** to add the details to the database. Comments relevant to the individual Item can be added afterwards rather than save them as part of the stored Solution. Click **Add to xxxx** to update the item.
4. If this item is linked to other items, and is the master item, you will have the option to close linked items as well.
5. When all details are complete, click **Save**. Closed Items can still be viewed in the Item list by checking the **Show Closed** option.

Adding Notes to Items

Operators can add notes to Items as and when required. The Operator name, date/time of the update and the amount of time spent dealing with the Item are recorded alongside the note. You can also flag the note with an appropriate image to indicate the type of action performed, for example whether an email was sent or you contacted the user by phone.

1. Open the required Incident, Problem or Change Request.
2. Click the **Add** button in the Additional Information section; this will display the editor window.



3. Specify the category of note; a standard web entry, email or phone. If email is selected, enter the recipient's addresses.

   Note: The entry type will default to the most consistently used by the Operator, based on their last 10 entries.

4. When sending an email any files associated to the item can be attached, click **Add** and select the required file. You can also choose to use an Email Template click **Templates** and select the required template.
5. Enter the additional information and format as required using the toolbar icons.
6. The time taken in the editor is displayed this is then added to the total time taken in the item. If required you can pause or reset the timer.
7. Click **Save**. The Item will be updated with the additional information.

Once a note has been added it can only be changed by a user with the permissions to edit notes.

Note: Emails are sent using the configured Mail Server Settings.

Adding Files to an Item

In NetSupport ServiceDesk it is possible to add a file to an Incident, Problem or Change Request. Once a file has been added the Item will display an additional tab labelled Associated files. From this tab any user that can read the Item can download and view any of the associated files. Files associated to an item can also be attached when sending an email from the item.

Often it is necessary to add one file to more that one Item, for example you may need to associate a patch for a particular application to two Items from different users that both have the application installed. NetSupport ServiceDesk allows ServiceDesk Operators to add a shared file that once uploaded to the NetSupport ServiceDesk server can then be associated to multiple Items.

As with all features in NetSupport ServiceDesk the only users with the correct permissions can upload files to NetSupport ServiceDesk.

Files that can be associated to more that once Item are called Shared files, Shared files can only be added by ServiceDesk Operators. Files that are and can only be associated to one Item are called Item files.

Note: NetSupport ServiceDesk does not currently support localised language characters in filenames, e.g. German Umlauts. This does not prevent you from associating the file to an Item but you may find that the character(s) can't be interpreted and the filename is amended accordingly.

Adding a file to a single Item

This method of adding a file to an Item is the only method available to both normal users and ServiceDesk Operators.

To Add a File to this Item Only:

1. Open the Item that you want to add a file to.
2. Click the **Add Files** button on the toolbar. This will open a new window displaying three options.
3. Select the **Add a File to this xxx Only** option and click **Next**.
4. Click **Browse** to select the file to add. You can also optionally enter a description for the file. This description will be displayed in the list of files on the Item.
5. Click **Next** to upload the file and associate the file to the open item.
6. Once the file is uploaded, a summary page displayed showing the details of the uploaded file.
7. Click **Finish**. The File Upload window is closed and the item is saved.

Note: Files can also be added when creating a new Item. Follow steps 2-7 when in the new Item window.

Adding a shared file (ServiceDesk Operators only)

If you need to add a file that can be associated to more than one Item then the file needs to be added as a shared file. Only ServiceDesk Operators can add Shared files.

To add a shared file:

1. Open one of the Items that the file needs associating to.
2. Press **Add Files** button on the toolbar.
3. Select the "**Add a file to Item XX that can also be associated to another Item**" option and click **Next**.
4. A tree view of shared file folders will be displayed, along with a text area to enter a description of the file and a File input box with a browse button.
5. If you have permissions you can create and delete file folders in the tree view.

6. Select a folder to store the Uploaded file into and click the **browse** button to select the file to upload. You can also optionally enter a description for the file; this description will be displayed in the list of files on the Item.
7. When the Operator presses the Next button the file is uploaded to the NetSupport ServiceDesk server and the file is associated to the open Item.
8. You are then presented with a summary page displaying the details of the uploaded file with a finish button.
9. When the finish button is pressed the File Upload window is closed and the Item is saved.

Note: Files can also be added when creating a new Item. Follow steps 2-9 when in the new Item window

Associating a shared file to an Item (ServiceDesk Operators only)

If you have already added a file to one Item as a shared file this file can then be associated to other Items. Only ServiceDesk Operators can associate an existing file with an Item.

To associate an existing shared file to an Item:

1. Open the Item the file needs associating to.
2. Press the **Add files** button on the toolbar, this will open a new window displaying three options.
3. Select the "**Associate an Existing file to Item XX**" option and click **Next**.
4. The next page displays a tree view of shared file folders and a file list displaying the contents of the selected file folder.
5. Selecting a folder, displays a list of all the shared files that have been uploaded to that folder. Select the required file from the list and click the **Next** button.
6. You are then presented with a summary page displaying the details of the Associated file with a finish button.
7. When the finish button is pressed the Add Files window is closed and the Item is saved.

Note: Files can also be added when creating a new Item. Follow steps 2-7 when in the new Item window.

Deleting associated files

Incidents, Problems and Change Requests that have associated files attached will have an Associated Files tab available in the item window.

When this tab is selected a list of associated files is displayed. If you have permissions to delete files a delete button will be displayed next to each file.

Pressing the delete button will delete the file. If this file is a shared file and is associated to other items then the file is removed from the open item, it will not be deleted from other items it's associated to.

Only users with permissions to delete files can remove files from an item.

Viewing Files associated to an Item

Items that have associated files attached will have an Associated Files tab available in the Item window.

When this tab is selected a list of associated files is displayed. This list displays the file name, the size of the file and the description of the file when it was added.

The file name is also a Hyperlink that can be used to download or display the file.

Any user with permission to read the Item can view the associated files.

Text Editor

A standard text editing tool is supplied with NetSupport ServiceDesk for use when adding progress information to an Incident, Problem, Change Request or including customisable messages on the logon page. As well as basic text messages, you can also include links to web sites and email addresses.

When adding information to Items you can select one of three buttons, web entry, email or phone to indicate the means of communication. This flags the item with an appropriate icon in the Additional Information section.

Note: The entry type will default to the most consistently used by the Operator, based on their last 10 entries.

The editing tool enables you to view text in either WYSIWYG or HTML format. A selection of other editing tools are available for formatting the information.

The time taken in the editor is displayed this is then added to the total time taken in the item. If required you can pause or reset the timer.

When sending an email any files associated to the item can be attached, click **Add** and select the required file. You can also choose to use an Email Template click **Templates** and select the required template.

When you have entered the information click **Save**.

Linking Items

There may be occasions where you want to link together Incidents, Problems and Change Requests, for example, you may have a Problem that relates to a number of Incidents. Once Items have been linked changes made to the master item can also be applied to all linked items.

To Link Items

1. Open the Incident, Problem or Change Request that you want be linked to another item.
2. Click the **Link** icon in the toolbar and enter the Incident, Problem or Change Request number.

   Note: The item number entered will be the master item.

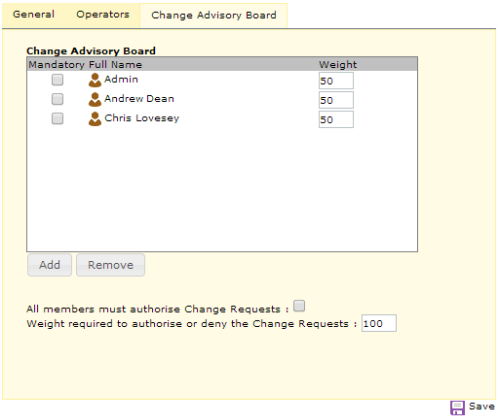
3. Click **Ok**.
4. The image at the top left of the window will now display an icon indicating that this item is linked to another. Clicking this icon will open the master item in a new window, a Linked Items tab will be displayed listing the items linked to this one and from here you can view linked items and delete links.



5. When changing the Category, Priority, Status, Resolution code, Assignee or Due date in the master item you will have the option to apply these changes to linked items.
6. Notes added to the master item can be viewed in the linked item by selecting Show Notes from Linked Items in the Additional information section.

Change Advisory Board

A Change Advisory Board (CAB) is the body that needs to authorise a Change Request. A CAB can be created for each Category that is displayed for Change Requests. Each member of the CAB can be assigned a "weighting" relevant to their role in the change process.



Categories that are displayed for Change Requests will have a Change Advisory Board tab displayed. From here, you can add the members required to authorise the Change Request. If a CAB member must authorise the change ensure the mandatory field next to the member is selected.

All members must authorise Change Requests
All members of the CAB must authorise the Change Request before it is approved.

Weight required to authorise or deny the Change Request
Optionally, there may be occasions where you are happy for the change to proceed without 100% CAB approval. A "weighting" limit can be applied and, once met, the Change Request will be authorised.

Note: This option will only be displayed when All members must authorise Change Requests is unchecked.

The Change Request will show whom authorisation is required from and the current status. The category, priority, status, assignee or due date can only be change by CAB members until it's been approved by all required members.

Audit Trail

NetSupport ServiceDesk keeps a record of any actions that are taken on an item. Any user that has permission to read the item can view the Audit trail.

To View the Audit Trail:

1. Open the required Incident, Problem or Change Request.
2. Click on the "**Audit Trail**" button on the toolbar.
3. A new window will open displaying the Audit trail.

The following events are recorded to the Audit trail:

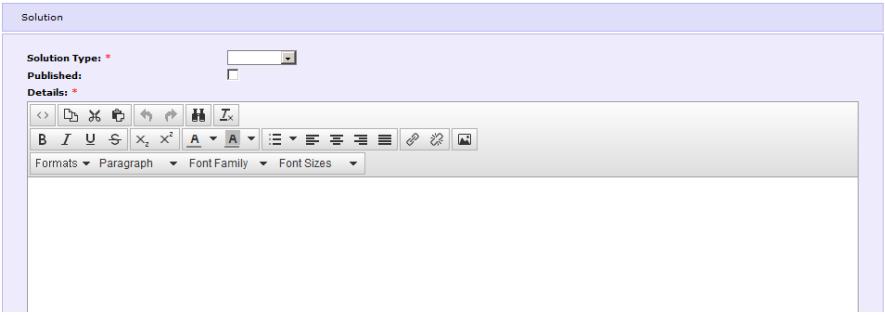
- Creation of a new Incident, Problem or Change Request
- Changes of Status
- Changes of Priority
- Workflow escalations
- Notes added or removed
- Due date changes
- Solutions added or removed
- Assignee changes
- Files added and removed
- Conversion of items e.g. Incident is converted to a Problem
- Authorisation of a Change Request has been set
- custom data changes.

Solutions

Before an Incident, Problem or Change Request can be closed the Operator must add appropriate resolution comments. To assist in this process the NetSupport ServiceDesk database holds a list of pre-defined Solutions, which can be created up-front by an Administrator/ServiceDesk Operator or defined when the item is being closed.

To access the various options in this category select the Home tab. In the Solutions section there are three choices:

New Solution



Enables you to define new Solutions. From the drop down list select the Solution type. The available choices are based on those defined in the Admin - Categories option so you could define a Solution for every potential problem.

Solutions need to be Published so 'normal' users can view them. (Users need to be granted appropriate Permissions in order to Publish Solutions)

Note: ServiceDesk Operators and users with the Edit Solutions permission enabled will be able to add an unpublished Solution.

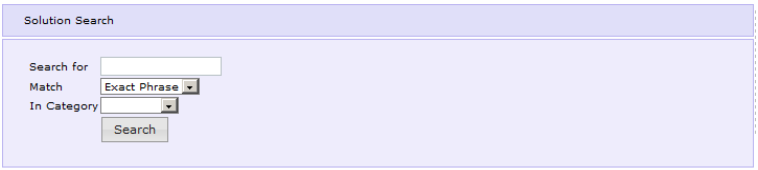
Supporting comments can also be included but Operators can add specific details at the point when they close an item.

If required you can attach an external file to the Solution. For example, a document containing pertinent technical advise for the end-user. When the Solution is added to the item the associated file is also displayed. Click **Add Files** and browse for the file to upload.

Click **Save** when the information is complete.

Search

Enables you to search the database for existing Solutions.



Enter the required search criteria and click **Search**. A list of matching items will be displayed.

View All

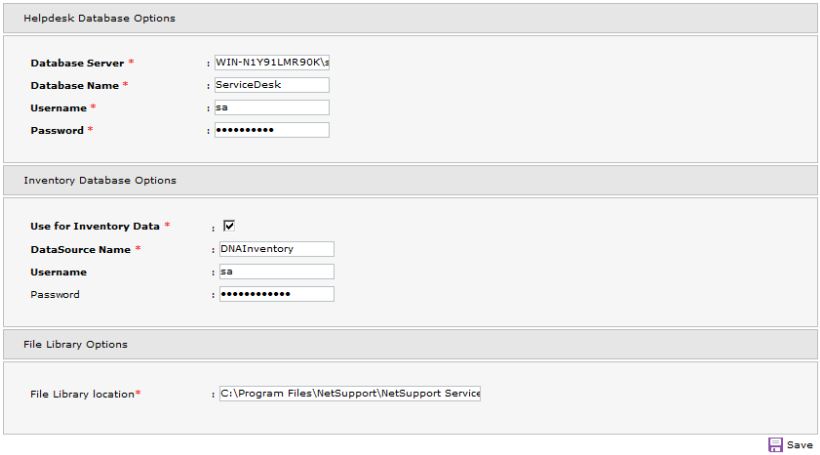
Lists all Solutions stored in the database. Click in any of the fields to select a specific Solution to view or edit. If a required Solution is not defined, click **New** on the toolbar.

Hardware/Software Inventory

Knowing the configuration of an end-users machine can provide vital clues when trying to diagnose a problem. NetSupport ServiceDesk can remotely retrieve a full Hardware/Software Inventory from an end-user PC.

To be able to use this feature you must have an installed copy of DNA Enterprise Suite available and a path to the DNA database configured. The IP addresses of the target machines are held within DNA's master database; NetSupport ServiceDesk itself has no means of identifying remote PCs. Once the link is established between NetSupport ServiceDesk and DNA you can retrieve the Inventory data and from there move on to using other Remote Control features.

In order to retrieve an inventory you must firstly establish the link to the DNA database. Select the Admin tab and click the **DB Options** icon in the toolbar. Enable **Use DNA for Inventory Data**. The default access details for the DNA Data Source should already be specified.



Note: If the NetSupport ServiceDesk database resides on a different server to the DNA database you will need to create a Data Source in order for the link to be established.

Click **Save**.

To Retrieve an Inventory from a remote PC

1. Open the Item requiring action.
2. Click the **Hardware** or **Software Inventory** tab.
3. Choose the machine to retrieve the Inventory from by clicking **Select a different PC**.
4. Details of the machines held in the DNA database will appear. Highlight the required PC in the tree, if it is not immediately visible click **Search** and enter the computer name, and click **OK**.
5. Click **Save** in order to retrieve the Inventory data.

To Retrieve an Inventory from the Local PC

1. From the NetSupport ServiceDesk Menu select Inventory - Hardware or Software.

Assigning Hardware

If the integration with NetSupport DNA for Inventory information is enabled you can assign a device from the DNA Hierarchy to an item in NetSupport ServiceDesk.

If a user has a DNA Client installed on their machine, when they create an item the Inventory data for that machine is automatically associated to the item.

If a ServiceDesk Operator is creating the new item on a machine that has a DNA Client installed then the Inventory data is not automatically associated, but the Operator can then select a machine from the DNA hierarchy by clicking on the "**Select a Different PC**" button on the inventory tab.

Remote Control Sessions

The ability to remotely connect to and view an end-users desktop provides a particularly useful means of diagnosing problems. NetSupport ServiceDesk can be configured to make use of remote control functionality enabling you to view an end-users desktop, retrieve a complete hardware/software inventory and hold an on-line text chat session.

A pre-requisite of being able to use these features is that you have an installed copy of the DNA Enterprise Suite. In order to establish a connection with a remote machine, NetSupport ServiceDesk needs to know the IP address of the target PC. NetSupport ServiceDesk does not hold this information and therefore relies on the DNA Master Database to provide the details.

Once the IP address is known you can retrieve a Hardware/Software Inventory from that machine. This in turn provides the mechanism by which you can remote control 'known' machines.

You have a choice as to how the additional functionality required to be able to Remote Control a machine is provided. NetSupport ServiceDesk does not provide these features by default and therefore needs to be configured to interact with a 3rd party application. DNA Enterprise Suite, if installed, provides basic remote control functionality or you may have a specific Remote Control product installed, such as NetSupport's own NetSupport Manager.

Starting a Remote Control Session

The ability to remote control an end-users machine is a valuable tool when trying to diagnose a problem. While NetSupport ServiceDesk itself does not provide remote control functionality by default, it can be configured to integrate with a 3rd party application. DNA Enterprise Suite provides a basic level of Remote Control functionality or you may have a specific Remote Control product installed, such as NetSupport's own NetSupport Manager.

Note: A pre-requisite of being able to use these features is that you have an installed copy of the DNA Enterprise Suite. In order to establish a connection with a remote machine, NetSupport ServiceDesk needs to know the IP address of the target PC. NetSupport ServiceDesk does not hold this information and therefore relies on the DNA Master Database to provide the details.

To Start a Remote Control Session

1. Open the item requiring action.
2. Establish a link with the PCs known to the DNA Master Database by retrieving a Hardware/Software Inventory for the required PC.
3. To start the remote control session, click **Remote Control** or **Chat** on the toolbar. (If a session has not previously been established you will need to configure the Remote Control settings.)
4. To open a session with a different PC, retrieve its Hardware/Software inventory and click **Remote Control** or **Chat**.

Set Remote Control Options

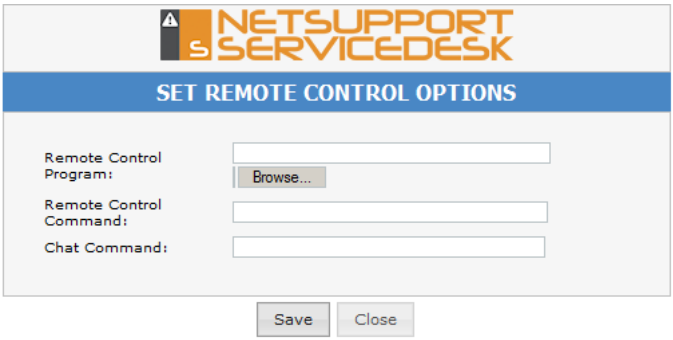
In order to use Remote Control functionality you need to integrate NetSupport ServiceDesk with a 3rd party Remote Control application, such as NetSupport's own NetSupport Manager.

First Time Use

When viewing an item, if a remote control session hasn't previously been established, the Set Remote Control Options window will appear. Once a link with the appropriate Remote Control product is established you simply retrieve a Hardware/Software Inventory each time you want to open a remote control session with a different PC.

1. Browse for the executable file that launches the program, in the case of NetSupport Manager's Control program this is PCICTLUI.exe.

2. Enter the appropriate command line parameters that will launch a view and chat session. If known, you can specify the machine name that you wish to connect to.
3. Click **Save**.



To Change Settings

If required you can change the Remote Control settings.

1. Select the Home tab and click the **RC Options** icon in the toolbar.
2. The Remote Control Options window will appear.
3. Enter the required properties.

Reports

NetSupport ServiceDesk provides an on-screen dashboard providing real-time statistical data enabling instant analysis of Incident, Problem and Change Request status.

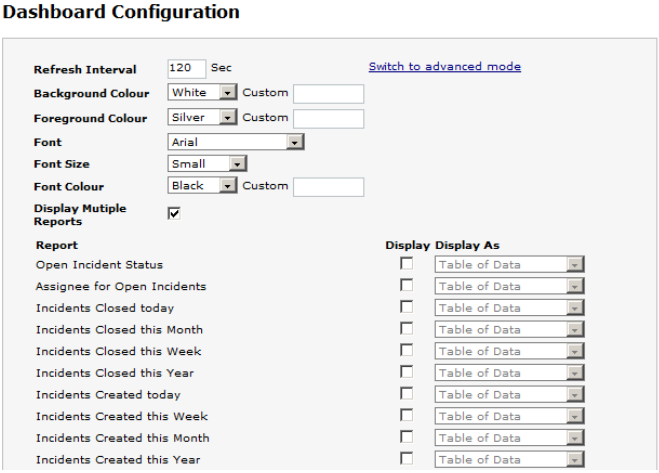
In addition to the selection pre-defined reports, NetSupport ServiceDesk allows you to create and save your own custom reports. The simple drag and drop interface enables you to build a fully customised report including HTML, text and supporting graphs.

Note: Existing users of NetSupport ServiceDesk who upgrade to version 5.0 will still have access to reports powered by the Crystal Report engine.

Dashboard

The ServiceDesk Dashboard provides Operators with on-line up-to-the-minute status reports. Pre-defined categories are supplied and you simply choose the appropriate items to include. Multiple categories can be selected simultaneously and the on-screen results are refreshed at intervals to suit your requirements.

To use the reports dashboard



1. Select the Reports tab and click the **Dashboard** icon in the toolbar. The Dashboard Configuration window will appear.

2. Set the refresh interval or use the 120 second default. This determines how quickly the dashboard cycles through each report.
3. Choose the display settings, background/foreground colours, font, font size and colour.
4. Choose to display all reports on one page or the dashboard will cycle through individual reports.
5. Select the pages to include. Multiple pages can be selected, the system cycling through each item based on the selected refresh interval.
6. Choose how you want the information displayed, as a table, pie chart or bar graph.
7. Click **Display** to launch the Dashboard. Reports are displayed full-screen.
8. Click when ready to leave the Dashboard.

Note: Selecting **Switch to advanced mode** allows you to enter you own CSS script.

For a more permanent record, NetSupport ServiceDesk provides you with the ability to create custom reports based on a previous search.

Explore Reports

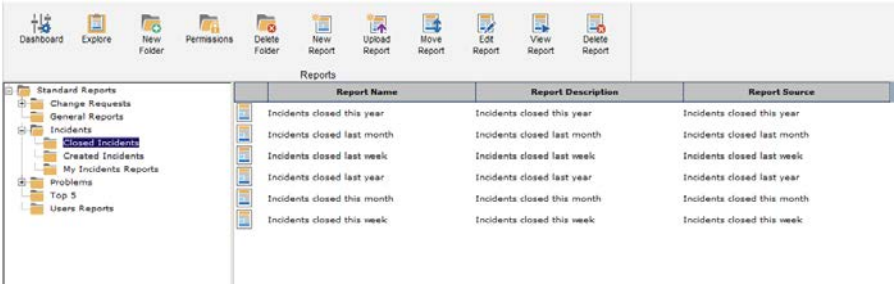
NetSupport ServiceDesk provides a number of pre-defined management reports. The built-in reports should cover most requirements, but users can create their own custom reports using the Custom Report Designer if needed.

By default, all users with permissions to read reports can open any of the reports listed. If you need to restrict access to certain report folders, you can set the permissions for a folder.

Note: Existing users of NetSupport ServiceDesk who upgrade to version 5.0 will still have access to reports powered by the Crystal Report engine.

To access NetSupport ServiceDesk's standard reports

1. Select the Reports tab and click the **Explore** icon in the toolbar.
2. A Tree view containing the pre-defined report folders will appear and the reports stored within each folder will be listed in the right-hand pane.



The toolbar options will only be available if the logged on user has appropriate permissions. The **Permissions** option on the toolbar is used to grant users access to the report folders.

3. To view a report, select the appropriate folder in the Tree view and click on the required report name in the right-hand pane. An output window will appear displaying the results. The report can be exported in a variety of formats.

Report Folder Permissions

If you need to restrict access to certain report folders, this can be done by changing the permissions on the report folder. By default, the Everyone group has permissions to all folders. To secure a folder, you must add a company, department or user to the folder permissions and remove the Everyone group.

Note: If a user has the permission to edit reports, then that user will be able to see all report folders, irrespective of any defined report permissions.

To set folder permissions:

1. Select the Reports tab and click the Explore icon in the toolbar.
2. Select the required folder from the folder list.
3. Click the Permissions icon on the toolbar to display the permissions for the folder.
4. Click Add to select the company, department or user that can access the folder and click OK.
5. If required, remove the Everyone group from the list.
6. Once you have set the required permissions click OK to save the changes.

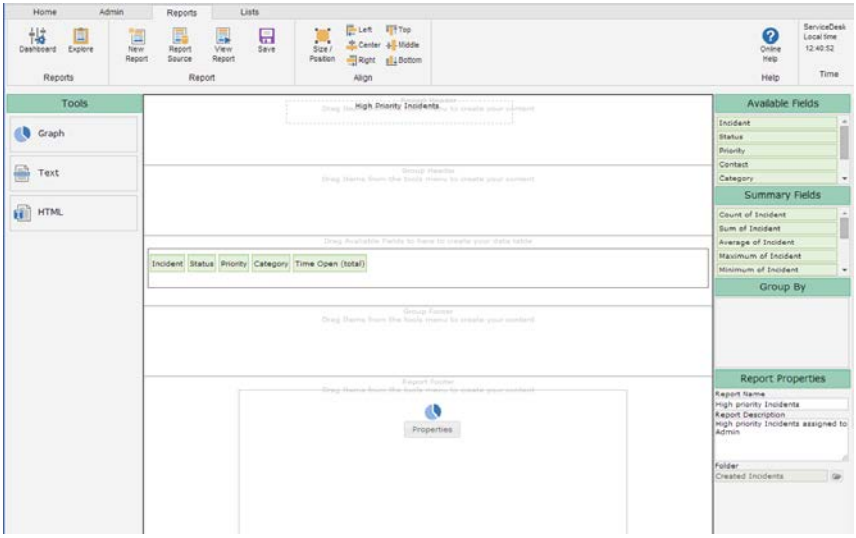
Custom Report Designer

As well as providing you with a selection pre-defined reports, NetSupport ServiceDesk allows you to create and save your own custom reports. The simple drag and drop interface enables you to build a fully customised report including HTML, text and supporting graphs.

Note: New reports are based on searches. To create a new report, you must create or use an existing saved search.

To create a new report

1. Select the Reports tab and click **Explore** in the toolbar.
2. A Tree view containing the pre-defined report folders will appear and the reports stored within each folder will be listed in the right-hand pane.
3. Click **New Report**.
4. From the drop-down list, select the saved search that the report will take the data from. You can create a new search by clicking **Create Search**.
5. Click **OK**.
6. The Design Report window will be displayed.



7. To create the structure for the report, drag the required tools from the left-hand side into the header or footer of the report and set the

required properties for each tool. The tools available are:
Graph
Text
HTML

8. To resize and position the tool, select the required tool and click the **Size/Position** icon in the Toolbar. You can also set the alignment by clicking the appropriate icon in the Toolbar.
9. To create the data table for the report, drag the required fields from the right-hand side to the available fields section.
10. Once you are happy with the format and you have the required data for your report, enter a report name, description and the folder location.
11. Click **Save**.
12. The report will now appear in the standard report Tree view under the specified folder. You can run the report from here.

To view a report

Note: Adobe Flash Player is required to view reports.

1. Select the Reports tab and click **Explore** in the toolbar.
2. Select the required report folder from the Tree view. All the reports in that folder will be listed in the right-hand pane.
3. Select the required report and click **View Report** in the toolbar.
4. The report will be displayed in a new tab in your web browser.

To edit a report

1. Select the Reports tab and click **Explore** in the toolbar.
2. Select the required report folder from the Tree view. All the reports in that folder will be listed in the right-hand pane.
3. Select the required report and click **Edit Report** in the toolbar.
4. Edit the report as required.
5. Click **Save**.

Note: To amend the saved search that the report is based on, click **Report Source** in the toolbar.

My Details - Change Logged on user details

The My Details section in the NetSupport ServiceDesk Home tab enables the logged on user to change personal details, password, preferences and view the summary page.

Contact NetSupport

UK & International
www.netsupportsoftware.com
Technical Support: *support@netsupportsoftware.com*
Sales (UK & Eire): *sales@netsupportsoftware.co.uk*
Sales (International): *sales@netsupportsoftware.com*

North America
www.netsupport-inc.com
Technical Support: *support@netsupport-inc.com*
Sales: *sales@netsupport-inc.com*

Canada
www.netsupport-canada.com
Technical Support: *support@netsupportsoftware.com*
Sales: *sales@netsupport-canada.com*

Germany, Austria and Switzerland
www.pci-software.de
Technical Support: *support@pci-software.de*
Sales: *sales@pci-software.de*

Japan
www.netsupportjapan.com
Technical Support: *support@netsupportsoftware.com*
Sales: *sales@netsupportjapan.com*

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