

Altiris eXpress™

Helpdesk Solution 5.6 SP1

User Guide



altiris®

intuitive > manageability

Notice

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Bootworks U.S. Patent No. 5,764,593.

RapiDeploy U.S. Patent No. 6,144,992.

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Contents

- Notice 2**
- Preface 6**
- Chapter 1: Introducing Helpdesk Solution 9**
 - Features and Benefits 11
 - System Requirements 12
- Chapter 2: Installing and Setting Up eXpress. 13**
 - Step 1 - Notification Server Computer Requirements 14
 - Step 2 – Install Helpdesk Solution 19
 - Step 3 – The Altiris eXpress .NET Configuration Wizard 19
 - Step 4 – The Configure Helpdesk Command 20
- Chapter 3: Helpdesk Overview. 21**
 - Architecture 21
 - Helpdesk Solution Consoles 22
 - Workers and Worker Queues 23
 - Contacts 24
 - Work Items 25
 - Assets 25
 - Integration with Microsoft Systems Management Server (SMS) 26
- Chapter 4: Installation. 27**
 - Prerequisites 27
 - Helpdesk Setup 28
 - Localization 33
- Chapter 5: Configuration 35**
 - Web Administration Console Interface Elements 35
 - Console Security 36
 - Entry Points 40
 - Licensing 43
- Chapter 6: User Interface 44**
 - Altiris eXpress Helpdesk Consoles 46
 - Helpdesk Worker Console 47
 - New Work Item 50
 - Add New Work Item 52
 - Additional Work Item Information 54
 - Attachments 55

Link Work Items	56
E-mail Messages	58
View Contact Properties - New Work Item	59
Find Contact - New Work Item	61
Select Contact - New Work Item	62
View Asset Properties - New Work Item	63
Find Asset - New Work Item	64
Select Asset - New Work Item	65
Find Work Items	66
Search in Comment or Title Field	69
Using Queries	70
List Query	71
New Query	71
Modify New Query Search	72
Query Data Types	73
Query Parameter Replacement	76
Delete Queries	78
Last Query Results	79
Retrieve Queued Item	80
Contacts	80
New Contact	82
Assets	84
New Asset	85
Recents	87
My Helpdesk Console	88
Work Item Request - NT User	91
Work Item Request - User	92
Work Item Request - Guest	92
Create Custom URL to Access Helpdesk Consoles	93
Support for Pocket PC (PPC)	94
Chapter 7: Administration	95
Helpdesk Admin Console	97
The Admin Report	98
Categories	100
Edit Categories	101
Add New Category	102
Modify Category	103
Move Category	104
Copy Category	105
Delete Category	106
Routing Rules	107
List Routing Rules	107
Process Order of Routing Rules	108
Edit Routing Rule	108
New Routing Rule	109
Delete Routing Rules	111
Notify Rules	112
New Notify Rule	113
Edit Notify Rule	115

Delete Notify Rules	116
E-mail Templates	117
New Template	118
Edit E-mail Templates	119
E-mail Template Macros	120
Bulletins	122
Add New Bulletin	123
Delete Bulletin	123
Sources	124
View Source	124
New NS Source	125
New SMS Source	125
Edit Source	126
Import from Source	127
Configure Helpdesk	128
Delete Work Items	130
Delete Contacts	133
Delete Assets	134
Workers	135
New Worker	135
Edit Worker	136
List Queue	137
New Queue	138
Reports	139
Notification Policies	140
Service Level Agreements	141
Chapter 8: Troubleshooting	142
Index	143

Preface

Before using this documentation, we recommend that you review the document conventions (see “[Document Conventions](#)” on page 6).

Detailed information about Altiris products is included in each product’s documentation. The product’s documentation is installed when the product is installed. To access Altiris product documentation from the Web, go to our documentation Web page at www.altiris.com/support/documentation.

If you have questions that are not answered in the documentation, we recommend that you use one of our support options (see “[Support](#)” on page 7).

If you have feedback about this documentation, please send an e-mail message to our documentation group at doc@altiris.com.

Document Conventions

The following table describes the conventions used in this document.

Document Conventions

What you see	Meaning
<i>Altiris eXpress Notification Server User Guide</i>	References to other documents are italicized. Note Most references to Altiris documents are hypertext links to those documents. For these links to work, the target document file must be in the same location as the source document. If viewing PDF documentation from our product CD or where the documents were installed on your hard drive, the links will work. If viewing a PDF document from our web site, the links to other Altiris documents will not work. (The documents are stored in different folders). If you download PDF documents from our web site and place them in the same folder, the document references will link to the other PDF document provided the target PDF document is in the folder.
Interface Element Name	Buttons, menu items, tabs, and field names are displayed in bold text.
File > Save	A series of mouse selections are represented in this format. The above example means click on the File command on the menu bar, and then click on the Save command.
<i>server name/altiris/ documents</i>	A value in a path that depends on the user’s system is in italics. In this example, <i>server name</i> needs to be replaced by the name of the user’s server.
<code>set variable = 123</code>	Sample code is in Courier font.
www.altiris.com	Links to web pages are in blue text.

Support

Altiris is committed to providing world-class technical support and professional services to its customers. Included with every product purchase is complimentary Electronic Support. For customers who want a higher level of support, Altiris offers many fee-based services ranging from Priority Support, which includes priority telephone and priority e-mail support, to on-site consultation.

Before Contacting Support

We recommend that you do the following before contacting Support:

- Download and install the latest version of the product and product updates from our web site (www.altiris.com).
- Read the product Release Notes. The Release Notes contain important information on the current release including limitations and application specific workarounds. Many customer questions are answered in the Release Notes.
- Review the information in the Altiris support forums (go to www.altiris.com and click on **Support** and then **Forums**). If you cannot find the answer to your question in the forums, you can post your own question. The forums are monitored by our Support engineers, who will help you with your questions.

Support Contact Information

Altiris is a global organization with operational centers in the following geographies:

- Americas in Lindon, Utah covering North and South America
- Asia Pacific in Sydney, Australia
- Europe, Middle East, and Africa (EMEA) in Landau, Germany

Contact information for each of these operational centers is available at www.altiris.com/contact.

When contacting Support, please include the following information in the e-mail or have it ready when calling:

- Your name, e-mail address, and phone number
- Product name and product version
- Specific details about the problem, including specific system messages, error codes, and logs
- Details about your system, including the operating system, applied services packs, hardware configuration, network details, and other applications running on the system.

Training

To ensure that you are using Altiris products in the most effective way, Altiris offers in-depth, instructor-led, hands-on courses. These courses will help you quickly learn the optimum methods for installing, configuring, and managing your network using Altiris' award-winning products. For information about Altiris training, go to the following web sites:

- <http://www.altiris.com/services/training/>
- <http://www.altiris-europe.com/services.htm>

Chapter 1:

Introducing Helpdesk Solution

Altiris eXpress™ Helpdesk Solution gives you a low-cost, highly-integrated help desk management system to automate the process of assigning, reporting, and resolving IT system management issues. Helpdesk Solution reduces system downtime across the organization, reduces incoming help calls and problem response time, and notifies administration personnel through desktop consoles or handheld devices. Incident tracking, reporting and integration make Helpdesk Solution a flexible tool to meet the ever-expanding, ever-changing demands placed on your IT department.

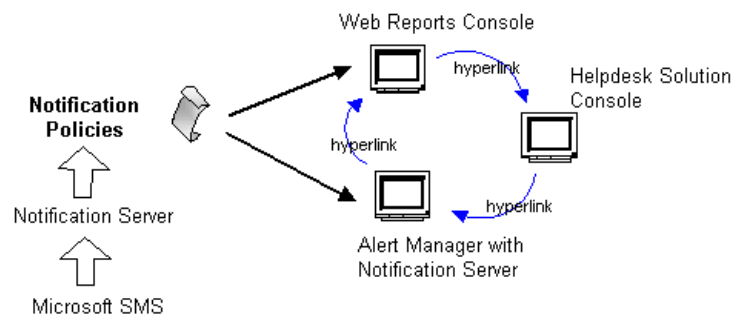
Helpdesk Solution is an easy-to-use, web-based solution designed to improve efficiency and reduce costs for your IT organization by reacting quickly to critical problems, allowing you to

- Manage assets and inventories, migrate computers, and deploy software
- Respond appropriately to service-level agreements (SLAs)
- Generate web-based reports to identify worker performance, schedules, histories, TCO and other business-critical information
- Access e-mail alerts or help desk issues remotely from desktops or handhelds
- Maximize worker efficiency by scheduling work items, allowing end-users to create their own work items, and linking similar or duplicate help desk issues.

In many cases, Helpdesk Solution eliminates the need to deploy IT personnel to each desktop, saving support costs and speeding problem resolution. And Helpdesk Solution allows you to easily design and install a system specific to your needs.

A Complete, Integrated System

Helpdesk Solution integrates natively with Microsoft SMS and other Altiris products using Notification Policies that link reports, the Helpdesk Console, and Alert Manager.



Integrate with Microsoft SMS

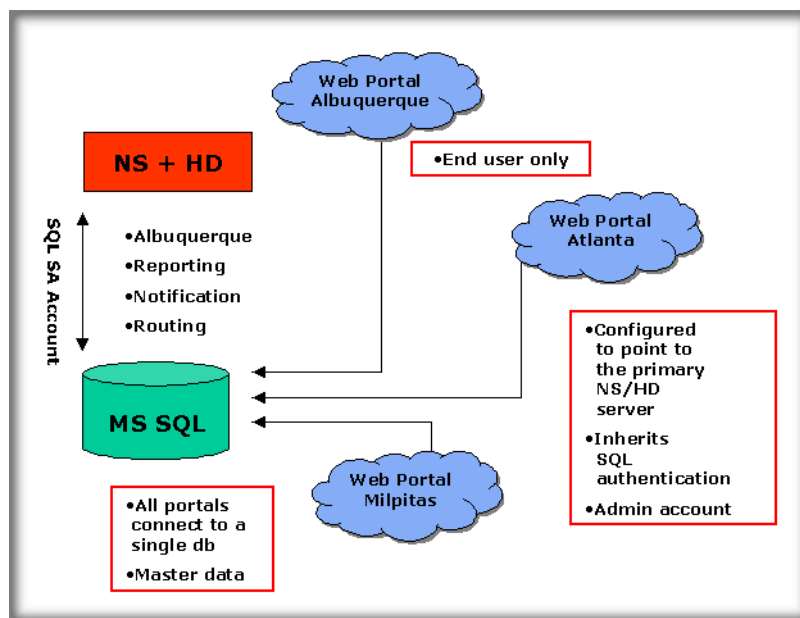
Helpdesk Solution integrates natively with Microsoft Systems Management Server (SMS). When combined with Altiris Web Admin for SMS, workers can access and extend native SMS features, using features to gather and report the inventory of hardware and software resources, install software packages, remotely control all types of computers, and integrate additional tools and Altiris eXpress Solutions.

Helpdesk Solution integrates tightly with Microsoft SMS by reflecting work orders from Helpdesk Solution into the SMS database and permitting SMS administrators to view problems and/or planned work from their console. A thumbnail of the SMS inventory is recorded with the work item in the Helpdesk Solution database.

Helpdesk Solution - Satellite Architecture

The Helpdesk Solution supports satellite installations. A satellite Helpdesk, is installed and configured by running `AeXHD.exe` locally on a satellite machine, which does not have NS installed, but otherwise meets all Helpdesk prerequisites. Point the configuration to the Notification Server where the master Helpdesk Solution is hosted. The Configure Helpdesk command requests the name of the master Helpdesk server that was previously installed and configured.

Satellites can be used to off-load Helpdesk UI activity from the master Helpdesk. Since the master Helpdesk is running on the same server as Notification Server, it competes for resources with inventory management, software distribution, and other functions. A satellite Helpdesk can provide better response times and scaling, all other things being equal.



Scenario

Here is a Helpdesk satellite scenario. The primary Notification Server and master Helpdesk server resides in Albuquerque, with satellites in Milpitas, Atlanta, and another in Austin for end users only.

The master and satellites in Milpitas and Atlanta provide web access to the Helpdesk database for both workers and end users. Austin is a satellite for end users only - this is accomplished by modifying the NTFS permissions on the Austin entry points to prevent the use of the worker consoles.

In this scenario, the following is true:

- Satellites are on a separate domain than the primary Helpdesk and Notification Server instance, SMTP server and the SQL database, this is not a requirement.
- Persistent VPN connection is used to connect the satellite servers to the master server. (Other schemes, such as port-specific firewall management can also work but may require more custom configuration). The satellites must be able to open SQLOLEDB connections to the SQL database and submit HTTP requests to the master Helpdesk. They must also be able to open the SMTP port on the machine designated during Notification Server installation as the SMTP server.
- When satellites are in separate, non-trusted domains, Helpdesk must use standard SQL Server logins and passwords accounts, not Windows accounts. This is controlled by the master Helpdesk, its connection string and other configuration details are passed to the

satellites every 4 minutes. Windows accounts (trusted connections) can be used if the Helpdesk identity, VPN, and domains are correctly configured.

- Attachments are stored on the satellites where they were uploaded.

Customize with Ease

Helpdesk Solution is 100% web-based to meet the needs of *any* organization. Helpdesk Solution provides the ability to extend the database or simply change the look and feel of the interface with the use of any text editor. Helpdesk Solution also comes with a selection of sample consoles that allow users to create their own work items. By allowing end-users to create their own work items, administrators can reduce the amount of time their workers spend on the phone and increase their time solving issues.

Helpdesk Solution improves service levels and reduces IT costs across your organization, allowing you to:

- Notify your IT department of business-critical events
- Allow workers to remotely manage their own Helpdesk tickets from any browser or CE device
- Use a self-help console to reduce the number of incoming calls to the help desk
- Report business critical information via the web
- Quickly install and configure Helpdesk Solution into any business environment.
- Customize the user interface for take advantage of different features and provide a custom look and feel.

Features and Benefits

eXpress provides many features and benefits. The following lists describes some of these features:

Features

- 1 Web-based.
 - Allows organizations to easily share and access data
- 2 Resource explorer drill-down.
 - Link from Helpdesk allows workers to access summary and detailed hardware and software inventory configuration
- 3 Helpdesk's self-help center (My Helpdesk).
- 4 Web reports.

Benefits

- 1 Allows each IS and IT organization to effectively communicate by managing all tasks in single web console.
- 2 View complete hardware and software inventory of the problem asset directly from the Helpdesk console.
- 3 Increase service levels by being proactive, notifying users of work item status and allowing them to submit work items and track status 24 x 7.
- 4 Maximize critical data by understanding work item trends and which assets and users require the most Helpdesk resource.

System Requirements

The following is a list of minimum requirements for the Helpdesk Solution.

Server

- Altiris eXpress Notification Server 5.5 SP2 or later
- A CD-ROM drive with Microsoft 2000 Server/Advanced Server and SP2 or later
- Hard drive formatted with NTFS file system
- Microsoft IIS 5.0 (IIS 5.0 requires webs to be hosted on NTFS)
- Microsoft SQL Server 2000 is recommended, SQL 7.0 (approved), MSDE is not recommended
- Microsoft Internet Explorer 6.0 or greater is recommended; all others browsers are supported
- Pentium III 933 MHz or higher
- 512 MB RAM (1 GB is recommended)

Worker Console

- Microsoft Internet Explorer 6.0 or later, Netscape Navigator 3.0 or later, Opera 4.0 or later

End User Console

- Although Helpdesk Solution works from any web browser, it works best with Internet Explorer 6.0 (or later)

Chapter 2:

Installing and Setting Up eXpress

The **Installation and Setup** topic list, includes the following:

- [Step 1 - Notification Server Computer Requirements \(page 14\)](#)
 - [Install Prerequisite Software to Notification Server \(page 15\)](#)
 - [Install Notification Server \(page 18\)](#)
- [Step 2 – Install Helpdesk Solution \(page 19\)](#)
 - [Satellite Helpdesk \(page 19\)](#)
- [Step 3 – The Altiris eXpress .NET Configuration Wizard \(page 19\)](#)
- [Step 4 – The Configure Helpdesk Command \(page 20\)](#)

Installation Preview

The Helpdesk Solution setup process consists of the following tasks:

- Create a Helpdesk user on the Windows server running Notification Server
- Create Helpdesk user queues
- Configure Helpdesk
- Create Helpdesk accounts.

Using eXpress is easy. Most of the work required to set up and use this solution has already been taken care of through predefined collections, policies, and reports. The following list outlines the steps needed to get up and running.

- Altiris eXpress.NET Configuration Wizard.
- Configure the Helpdesk database

Software Requirements

The following must be installed before installing eXpress:

- Notification Server version 5.5 (or above)

For more information on installing Notification Server, see the *Altiris eXpress Notification Server User Guide*.
Altiris eXpress Notification Server User Guide.

Step 1 - Notification Server Computer Requirements

The computer you are going to install Notification Server on must meet or exceed the following criteria.

Hardware

The following are minimum requirements. To scale to support thousands of clients, faster processors and more memory are highly recommended on the server.

- **Processor:** Pentium Pro 200 MHz or faster
- **RAM:** 512 MB (1 GB is recommended)
- **File System:** 2 GB NTFS system partition
- **Disk space:** 30 MB for SQL database (4 GB recommended)
- **CD-ROM:** Required

Software

Note The Install Helper will help determine if the computer has the necessary prerequisite software installed, and when possible it will help you download and install the needed software. For more information, see [“Install Prerequisite Software to Notification Server”](#) on page 15.

Operating System (one of the following)

- Windows 2000 Server (recommended)
- Windows Advanced Server
- with Windows Internet Information Services (IIS) installed with FTP configured.

SQL Database (one of the following)

- Microsoft SQL Server 2000 (recommended)
- Microsoft SQL Server 7

Important If you do not have a SQL Server database installed, the **Software Prerequisites Wizard** will give you the option to download and install MSDE. The MSDE database may be used for evaluation purposes, but is **not** recommended for a *live* production environment.

Microsoft Windows Internet Information Services (IIS)

- Microsoft IIS 5.0 (requires Webs to be hosted on NTFS) -- This component is **not** installed by default with Windows 2000 or later

Microsoft Windows Internet Information Services FTP Services

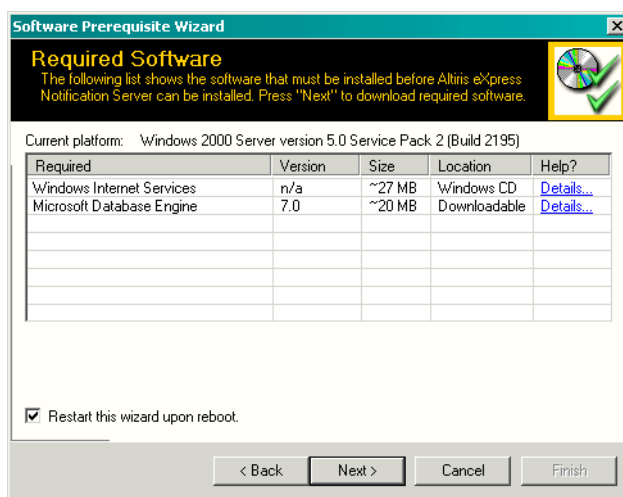
- The FTP component is installed by default with Windows 2000 or later

Web Browser

- Microsoft Internet Explorer 6.0 or later

Install Prerequisite Software to Notification Server

- 1 Start the Altiris eXpress Notification Server Install Helper (AeXNSInstallHelper.exe), read the information on the screen, and click **Next**.
- 2 When the **Computer Prerequisites** screen appears:
 - If you do not want to install Notification Server on the computer, click **No**, and then **Next**.
 - If you want to install Notification Server on the computer, click **Yes**, and then **Next**.
 The Software Prerequisites Wizard checks the computer to make sure it has the needed prerequisite software installed (such as Windows 2000/XP Internet Information Services (IIS), and SQL 7 or 2000, or MSDE).
 - If the required software is installed, click **Finish**. Go to “[Install Notification Server](#)” on page 18.
 - If the required software is NOT installed, the Wizard goes to the next step.
- 3 If the computer requires additional software to run Notification Server, a screen similar to the following appears:



Note In this example, Windows 2000/XP Internet Information Services (also known as IIS) and a SQL database were not on the computer.

Review the information and click **Next**.

- 4 If the Download and Install Microsoft Database Engine screen appears, do the following:



- a If you want to install the MSDE version of SQL (**not recommended** for Helpdesk Solution) on the computer, click **Yes** and **Next**.
Note If you have a SQL Server database that you want to use for the Notification Server database, click **No** and **Next** then go to see if additional required software that can be automatically downloaded is needed, download the software using a process similar to the process specified in Step 4.
 - b When the **File Download** dialog box appears:
When using Internet Explorer 6 (with the current Microsoft updates), click **Open**.
Important If using Internet Explorer 6 without the current Microsoft updates, click **Save**, and then enter a folder to save the file in. When the download is completed, click **Open**.
When using Internet Explorer 5, click **Run this program from its current location** and click **OK**.
 - c When asked if you want to install `unixdbsetup.exe`, click **Yes**.
 - d When the **WinZip Self-Extractor** dialog box opens, click **Unzip**.
 - e When the **WinZip Self-Extractor** confirmation dialog that the file is unzipped appears, click **OK**.
 - f When the command box appears, wait for the MSDE installation to complete. This installation may take a few minutes.
 - g When the MSDE installation is completed, press any key to close the command box.
 - h When the **Download and Installation** screen appears. Click **Next**.
- 5 If additional required software that can be automatically downloaded is needed, download the software using a process similar to the process specified in [Step 4](#).
 - 6 When all of the required prerequisite software is loaded, a screen similar to the following appears. Go to [“Install Notification Server”](#) on page 18.



- 7 If all of the components that can be downloaded have been downloaded but additional software needs to be installed, a screen similar to the following appears listing the additional software that needs to be installed.



Note which software needs to be installed and then click **Finish**.

Important You need to install the software that could not be automatically loaded and then run the Software Prerequisites Wizard again.

- 8 If necessary, install Windows 2000/XP Internet Services as follows:
 - a On the Windows toolbar, click **Start > Settings > Control Panel > Add/Remove Programs**.
 - b In the left pane, click **Add/Remove Windows Components**.
 - c Check the **Internet Information Services (IIS)** check box.
 - d Click **Details**.
 - e Check the **File Transfer Protocol (FTP) Server** and **World Wide Web Server** subcomponents check boxes.
 - f Click **OK**.
 - g Click **Next**.
 - h Follow the instructions on the screen to complete the Windows Components Wizard.
- 9 When all the required prerequisite software is installed, and if needed, restart the Software Prerequisites Wizard again. See [Step 1](#).

- 10 When all of the prerequisite software is installed and the following screen appears. Read the information on the screen and click **Finish**.



The Install Helper will start the Notification Server installation.

Install Notification Server

- 1 When you complete the **Software Prerequisites Wizard**, and then click **Finish**.
- 2 When the **AeXNSInstallHelper** dialog appears, read the information on the screen and click **OK**.
The Notification Server Installation will begin.
- 3 After the Altiris documentation page appears, the **File Download** dialog box is displayed, do one of the following:
 - Click **Open** to execute the file.
 - Click **Save**, and then browse to a folder to save the file. When the file is finished saving, click **Open**.
- 4 The **AeXNS_5.5.msi** file will download, the Windows Installer will start, and the **Altiris eXpress Notification Server 5.5 – Install Wizard** will start. Read the information on the screen, and then click **Next**.
- 5 On the **License Agreement** screen, read the License Agreement, click **I accept the terms of the license agreement**, and click **Next**.
- 6 On the **Customer Information** screen, enter applicable information, and then click **Next**.
- 7 On the **Setup Type** screen, click **Complete**, and then click **Next**.
- 8 On the **Ready to Install the Program** screen, click **Install**.
The Installing Altiris eXpress Notification Server 5.5 screen appears and the software is installed.
- 9 When the **Install Shield Wizard Completed** screen appears, click **Finish**.

The Notification Server Installation is completed. The Notification Server Setup Wizard starts the Altiris eXpress Notification Server Configuration.

Tip If you know the groups that you will want to categorize your Helpdesk users into, you can create the Windows NT Groups for the Helpdesk users now. For more information on creating Windows NT Groups for Helpdesk, see [“Create NT Groups for Helpdesk Users on a Windows Server”](#) on page 26.

Step 2 – Install Helpdesk Solution

When you install eXpress, eXpress collections, packages, reports, and policies are loaded onto the Notification Server.

- 1 Log in to the Windows Server running Notification Server using the Helpdesk user.
If the Windows Server configuration screen appears, click **Close**.
- 2 Start the Web Administration Console by clicking **Start > Programs > Altiris > Altiris eXpress > Notification Server > Web Administration Console**.
- 3 Click the **Configuration** tab.
- 4 In the left pane, click **Solution Center**.
- 5 Select the location of the Solution Center you want to install from.
 - To install from the Altiris CD, insert the CD in to the CD-ROM drive, then select **Search the CD drive on the Notification Server for the Solution Center**.
 - To install from the Internet, select **Use the Solution Center on the Altiris Web site**.
 - To install from another location, select **Specify another location** and enter the URL in the **Solution Center** box.
- 6 Click **Apply**.
- 7 Click the **Solutions Center** tab and wait a moment for the screen to refresh.
- 8 If you are using the Altiris CD for the Solution Center or a location other than the Altiris Web site, the **Browse For Folder** dialog box appears. Browse to the CD or the directory where the Solution Center is located and click **OK**.
- 9 Click **Helpdesk and Problem Resolution**.
- 10 Click **Helpdesk Solution**.
- 11 Click **Start**.

The download and installation process (Setup) starts.

Beside the Helpdesk Solution files, the .NET Framework (Service Pack 2) and MDAC 2.7 components may have to be installed. This will happen automatically. You may have to reboot the system after the installation has completed.

Satellite Helpdesk

A satellite Helpdesk, is installed and configured locally on a satellite computer, which does not have NS installed, but otherwise meets all Helpdesk prerequisites. For details, see [“Helpdesk Solution - Satellite Architecture”](#) on page 10.

To Install a Satellite Helpdesk

- 1 Copy the AeXHD.exe file to a computer, not running Notification Server.
- 2 Run the AeXHD.exe file, and then follow the instructions of the Helpdesk Wizard.

Step 3 – The Altiris eXpress .NET Configuration Wizard

When Setup is finished, the **Altiris eXpress .NET Configuration Wizard** is launched automatically. You can also run the wizard at any time from the Start Menu shortcut. To run the .NET Wizard manually, do the following.

- 1 **Start Menu > Programs > Altiris > Altiris eXpress > Helpdesk Solutions > Helpdesk ASP.NET Config.**
- 2 See [“Altiris eXpress.NET Configuration Wizard”](#) on page 29 for detailed instructions on how to run this wizard.

Important You will not be able to run Helpdesk successfully until you run and complete this wizard.

When you do, it will launch Helpdesk and usually present you with the **Configure Helpdesk command**. See [“Configure Helpdesk”](#) on page 128 for more detailed instructions.

Step 4 – The Configure Helpdesk Command

When you finish the **Configure Helpdesk Command**, the Helpdesk Solution basic setup is now complete.

Note When Helpdesk Solution is installed configured, and set up, all Notification Policies are disabled by default. You will want to review and disable any policies not needed, to prevent excess notifications. For information on policies, see [“Notification Policies”](#) on page 140.

Chapter 3:

Helpdesk Overview

The **Helpdesk Overview** topic list, includes the following:

- [Architecture \(page 21\)](#)
- [Helpdesk Solution Consoles \(page 22\)](#)
- [Workers and Worker Queues \(page 23\)](#)
- [Contacts \(page 24\)](#)
- [Work Items \(page 25\)](#)
- [Assets \(page 25\)](#)
- [Integration with Microsoft Systems Management Server \(SMS\) \(page 26\)](#)

Architecture

Notification Server

Notification Server runs based on policies set by an administrator. These policies activate components of Notification Server that are used to process and store inventory data, host web pages, forward data to SMS, and many other tasks. This simplifies the administration of systems management in your distributed network environment.

Notification Server runs on Windows 2000/Advanced Server SP2 and uses SQL 2000 (recommended) or SQL 7.0 SP1 (approved) database to store the information.

Notification Server provides security for console views and functions as well as reports.

For more information about Notification Server see the *Altiris eXpress Notification Server User Guide* on the product CD or on our web site at <http://www.altiris.com/support/documentation>.

Consoles

Helpdesk Solution provides a web-based console for basic and advanced IT Management. Each console is accessed through a unique URL, and has its own security properties.

Web Reports and Notification Policies

Helpdesk Solution provides numerous reports, such as: work items, worker activity, schedules, Service Level Agreements (SLAs), and cost analysis to name a few.

Helpdesk Solution also provides Notification Policies and Notify Rules to select personnel when defined conditions occur, such as: new work items received, high priority items not closed within a select time frame and more. These Notification Policies automate the monitoring of work item activity.

Additional Information

- [“Helpdesk Solution Consoles”](#) on page 22
- [“Reports”](#) on page 139
- [“Notification Policies”](#) on page 140

- “Notify Rules” on page 112

Helpdesk Solution Consoles

The **Altiris eXpress Helpdesk Consoles** page provides an easy way to access all necessary consoles. Based on NT authentication, only the consoles available for the user logging on, will be visible on this page.

Helpdesk	
Altiris eXpress Helpdesk consoles	
Name	Description
» Helpdesk Admin console	Worker console with administrative functions for the Helpdesk Solution.
» Helpdesk Worker console	Worker console for the Helpdesk Solution.
» My Helpdesk console	End-user console appropriate for employees with an NT Id in an intranet environment.
» Work item request - NT User	End-user console appropriate for employees with an NT Id in an intranet environment (fewer features).
» Work item request - User	End-user console for internet or intranet use. Users are tracked by e-mail address.
» Work item request - Guest	End-user console appropriate for anonymous access from the Internet.

- 1 Click **Start > Programs > Altiris > Altiris eXpress > Helpdesk Solution > Helpdesk Consoles**.
- 2 Type the following URL in your web browser - <http://<server>/AeXHD>.
- 3 Create a custom URL alias and type that alias in your web browser.

The following consoles are used in Helpdesk Solution.

Administrator Console

The **Admin console** provides full access to the **Worker console**, as well as the following administrator functions:

- Setup and configure
- Setup and configure queues
- Manage asset and contact data sources
- Publish bulletins
- Manage the work item category list
- Configure work item routing rules
- E-mail template content
- Configure and maintain the database
- Import data from multiple sources: Notification Server and Microsoft Systems Management Server (SMS)
- Configure notify rules

Worker Consoles

The **Worker console** allows **workers** to do the following:

- Create, search and manage work items
- Define and view detailed managed assets
- Create user contact information
- Run queries
- Create and manage service requests
- Generate custom worker reports
- Remotely control machines (requires Altiris Carbon Copy)

User Consoles

The **My Helpdesk console** allows **users** to the following:

- submit work item requests track status of work items
- edit contact information
- submit comments to the help desk
- attach files or screen shots to work items

The Helpdesk Solution ships with a **Work item request - Guest console**, to allow anonymous access in and open environment.

See Also

- [“Administration”](#) on page 95
- [“Altiris eXpress Helpdesk Consoles”](#) on page 46
- [“My Helpdesk Console”](#) on page 88
- [“Create Custom URL to Access Helpdesk Consoles”](#) on page 93
- [“Console Security”](#) on page 36.

Workers and Worker Queues

Workers

A worker is a help desk worker or technician at any level. Workers are created in the Administrator Console and must correspond to a valid Windows NT/2000 user account.

Administrators can assign a hourly rate to workers or to a worker’s queue, to track costs associated with work items. The hourly rate is displayed in clear text, and is visible to Administrators so caution should be used. It is recommended to include an average hourly rate for a queue instead of a specific worker, to maintain security. Therefore, it is critical that workers be assigned to an appropriate queue for successful cost analysis of labor hours.

Worker Queues

Queues are like workers in that it is possible to assign work items to a queue. Workers are able to run queries to list work items assigned *to* queues, as well as retrieve work items *from* queues. A worker has a specific queue that is assigned to the worker. The worker can be said to belong to that queue. Another way to look at queues, is that they are groups of workers. For example, Workers assigned to the queue named Level 1, are workers who all been assigned to the Level 1 queue.

Helpdesk provides eleven default queues, that correspond to classes of workers that are commonly found in a production Helpdesk environment. These are:

- **Level 1** Workers accept and qualify work item requests. If the work item cannot be resolved by a worker in the Level 1 workgroup, they dispatch the work item to field a technician. Additionally, Level 1 workers generally resolve issues such as password resets or *How to* type questions.
- **Level 2** Workers are generally more technical than a Level 1 worker. If a work item cannot be resolved by a Level 1 worker, the first level of escalation is to a Level 2 worker. Typically, this queue is assigned to a combination of telephone support people, system managers, or field managers.
- **Level 2 Desktop** Level 2 workers trained to handle desktop issues.
- **Level 2 Network** Level 2 workers trained to handle network issues.
- **Level 2 Server** Level 2 workers trained to handle server issues.
- **Operations** Workers in the Operations queue are assigned work items generated for the Operations department.
- **Professional Services** Workers in the Professional Services queue are assigned work items generated for the Professional Services department.

- **Human Resources** Workers in the Human Resources queue are assigned work items generated for the Human Resources department.
- **Asset Management** Workers in the Asset Management queue are assigned work items generated for the Asset Management department.
- **Deployment-SW Delivery** Workers in the Deployment-SW Delivery queue are responsible for tasks associated with the initial deployment of software packages and subsequent updates.
- **Supervisor** Used for managers, supervisors, or administrators.

Contacts

Contacts are users who request help, or managers acting as the contact point for another user for the associated problem or request. Each user should be defined in the database as a contact. Workers are also contacts and their information is stored in the database as well. Contacts are associated with work items.

Contact information includes the following:

- Name
- NT ID (if applicable)
- E-mail
- Pager email
- Phone
- Cell phone
- Pager
- Location
- Organization
- Password
- Employee ID
- Comments
- Status
- VIP (Very Important Person)
- Title
- Department
- Company

Helpdesk Solution can also associate with end user information as defined in Notification Server. Existing Notification Server data can be automatically imported into the Helpdesk Solution. Contact data can be entered manually by the Helpdesk workers when a new work item is created. Additionally, contact data from other data sources can be imported into Helpdesk Solution using the SQL Import/Export Manager.

See Also

- [“Contacts”](#) on page 80

Note Contact data imported from Notification Server, but modified in Helpdesk is not overridden on subsequent imports. For complete data integrity, contact data should be modified in Notification Server via regular updates, then imported from Helpdesk on a scheduled basis.

Work Items

A work item defines a task to be performed. Work items are created by workers in the worker console, by users via the self-help console or by events passed from Notification Server to Helpdesk. Administrators can allow users to create work items themselves by providing an appropriate the URL and access to a user console.

A work item is assigned to either a worker or a queue. Work item routing rules are applied to determine which worker or queue will be assigned a given work item whenever a work item is created or modified. Workers can use the **Retrieve** command to retrieve work items with the earliest creation date from their assigned queue. Additionally, workers can find work items by generating queries in the **Work item queries page**, and the **Find work items page**.

Note The **Retrieve** command retrieves work items based on settings selected in the **workers preferences** section in the **Admin console**.

A work item may be a current issue to be solved or a task planned to be done in the future. A planned work item is given a start date and a due date. The date and time information is used to determine Service Level Agreements, worker schedules, and the elapsed time to completion.

See Also

- [“New Work Item”](#) on page 50

Assets

Assets are real devices such as computers, printers, phones, or furniture that are identified as unique objects in the database. Assets can be associated with work items and contacts.

For example, if an end user reports a problem printing to a network printer, a worker has the option of associating that printer with the work item. Associating assets with work items is important when running reports detailing machine/object history. This allows administrators to run reports based on specific hardware devices and associated costs.

Asset information includes the following:

- Name
- Type
 - Computer
 - Printer
 - Phone
 - Modem
 - Network Port
 - Document
 - Application
 - Other
- External ID
- Location
- Manufacturer
- Model
- Serial #
- Asset Tag
- OS (Operating System)
- IP Address
- Organization
- Comment
- Asset is either active or not active

Integration with Microsoft Systems Management Server (SMS)

The integration with Microsoft SMS is bi-directional. Work items defined in Helpdesk Solution can be linked into the SMS database, based on assets that were previously imported from SMS into Helpdesk. This permits SMS administrators to view problems and plan work for those assets. In addition, SMS administrators can create collections that will not advertise a program to machines with open work items, if desired.

SMS resource information can be imported into Helpdesk Solution and associated with the work items in the Helpdesk Solution database. This permits historical reporting based on platform, domain and location as well as change management reporting for a machine over the life of the system.

See Also

- For more information about leveraging SMS functionality from a browser, see the *Web Admin for SMS User Guide* on the product CD or on our web site at <http://www.altiris.com/support/documentation>.
- For more information about registering SMS as a source for importing data, see “View Source” on page 124.

Chapter 4:

Installation

The **Helpdesk Installation** topic list, includes the following:

- [Prerequisites \(page 27\)](#)
 - [Installation \(page 28\)](#)
- [Helpdesk Setup \(page 28\)](#)
 - [Altiris eXpress.NET Configuration Wizard \(page 29\)](#)
 - [Modifying Helpdesk Solution Installation Configuration \(page 31\)](#)
 - [Upgrading Releases \(page 32\)](#)
 - [Uninstalling \(page 32\)](#)
- [Localization \(page 33\)](#)

Prerequisites

Server

Helpdesk Solution requires the following:

- Altiris eXpress Notification Server 5.5 SP2 or later
- Microsoft 2000 Server/Advanced Server with SP2 with a CD-ROM drive
- Hard drive formatted with NTFS file system
- Microsoft IIS 5.0 (IIS 5.0 requires webs to be hosted on NTFS)
- Microsoft SQL Server 2000 is recommended, SQL 7.0 (approved), MSDE is not recommended
- Microsoft Internet Explorer 6.0 or later is recommended; all others browsers are supported
- Pentium III 933 MHz or higher
- 512 MB RAM (1 GB is recommended)

Installation

Before installing Helpdesk Solution, review the “[Prerequisites](#)” on page 27.

Installation has three phases that occur one after the other as a part of a standard Windows Installer installation:

- 1 Setup
- 2 Altiris eXpress.NET Configuration Wizard
- 3 Database Configuration

Caution Notification Server must be installed before installing Helpdesk Solution. Refer to the *Altiris eXpress Notification Server User Guide* on the product CD or on our web site at <http://www.altiris.com/support/documentation>.

Important Notification Server install will create a Helpdesk database called **AeXNS_Helpdesk** that is used by **Alert Manager**. Helpdesk Solution can be configured to use the existing database or create another. If **Alert Manager** has been used, you will want to use the **AeXNS_Helpdesk** database to maintain existing data. If you are upgrading from a previous version of Helpdesk Solution, then Helpdesk 5.6 will upgrade your existing database if you prefer.

Helpdesk Setup

Setup installs the program files and creates a virtual under the default web site on the target server.

Note The name of the web site is AeXHD (not case-sensitive). If that web site already exists, it is overwritten. The logged in account should have full admin/sa privileges on the SQL Server that will be used.

Beside the Helpdesk Solution files, the .NET Framework and MDAC 2.7 components may have to be installed. This will happen automatically. You may have to reboot the system after the installation has completed. Setup will resume automatically after the system is rebooted. Helpdesk Solution files will not be installed until after the .NET Framework and MDAC 2.7 components have been successfully installed.

IMPORTANT Helpdesk installs the latest .NET Framework service pack available at the time Helpdesk Solution was released. Be sure to install the most current .NET Framework Service Packs available or critical updates as soon as possible. You can find the .NET Framework and service packs on the Microsoft Windows Update site.

- 4 Insert the Altiris CD.
Note If you are installing from the Altiris web site, you do not need the CD.
- 5 Click **Start** and select **Programs > Altiris > Altiris eXpress > Notification Server > Web Administration Console** to start the **Web Administration Console**.
- 6 Make sure that you are pointing to the Solution Center location you want to use (CD, Altiris web site, or other).
 - a Click the **Configuration** tab.
 - b In the left pane, click **Solution Center**.
 - c Select the correct Solution Center location, then click **Apply**.
- 7 Click the **Solutions Center** tab.
- 8 Click **Helpdesk and Problem Resolution**.
- 9 Click **Helpdesk Solution**.
- 10 Click **Start**.

Setup will begin. If the .NET Framework and MDAC 2.7 components are not installed then Setup will install them and probably require you to reboot the system. Setup will automatically resume after the reboot.

- 11 To start the Setup Wizard, click **Next**.
- 12 Read and agree to the license agreement and click **Next**.
- 13 Select the destination directory and click **Next**.
- 14 Click **Finish**. The **Altiris eXpress.NET Configuration Wizard** will launch, go to “[Altiris eXpress.NET Configuration Wizard](#)” on page 29.

Important You will not be able to run Helpdesk successfully until you run and complete this wizard.

Altiris eXpress.NET Configuration Wizard

Altiris eXpress.NET Configuration Wizard lets you configure Helpdesk to run under the identity of a user account set by an administrator. You must complete this wizard to finish the installation before launching any Helpdesk console.

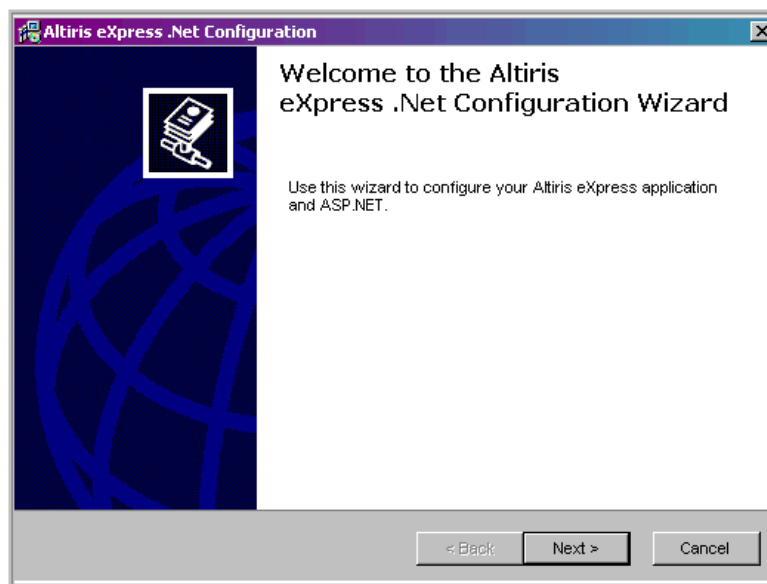
IMPORTANT Altiris recommends you choose the same account you supplied when you installed Altiris Notification Server. That account should not be the account of a real user and it should be set so that the password never expires. See the Notification Server documentation for more details about configuring that account.

If Helpdesk Solution fails to run because the password has expired or changed, you will have to run the **Altiris eXpress.NET Configuration Wizard** again, to reset the account. You may have to manually restart IIS for the account changes to take effect.

The Helpdesk Solution account should belong to the local Administrators group and must be able to do the following:

- Access and launch DCOM objects
- Only read, write, and modify all tables in the Helpdesk Solution database on the SQL Server you select.

To configure the Helpdesk Configuration Wizard



- 1 Click **Start>Programs>Altiris>Altiris eXpress>Helpdesk Solution>Helpdesk ASP.NET Config**.
- 2 Click **Next**.

Altiris eXpress .Net Configuration - Helpdesk Solution

altiris™ eXpress

Set application identity

Select the identity you would like to run the application under.

Run the application using the global ASP.NET identity.
Selecting this option will configure the application to run under an identity determined by ASP.NET.

Run the application using a specified identity.
Selecting this option will configure the application to run under the identity specified below. The username and password will be stored in clear text in the application's web.config file. NOTE: This option will set ASP.NET to run under the SYSTEM identity. This will affect all ASP.NET applications on this machine.

DOMAIN\User: altiris\khennebry

Password: *****

Confirm password: *****

For more information about the advantages and disadvantages of each option please press the More Info button.

More Info < Back Next > Cancel

- 3 Enter a **domain\user** and **password**.
 - a Click **More Info** for more information.
- 4 Click **Next**.
- 5 You will receive the following confirmation.

Altiris eXpress .Net Configuration - Helpdesk Solution

altiris™ eXpress

Ready to commit changes

You have chosen to set the following configuration

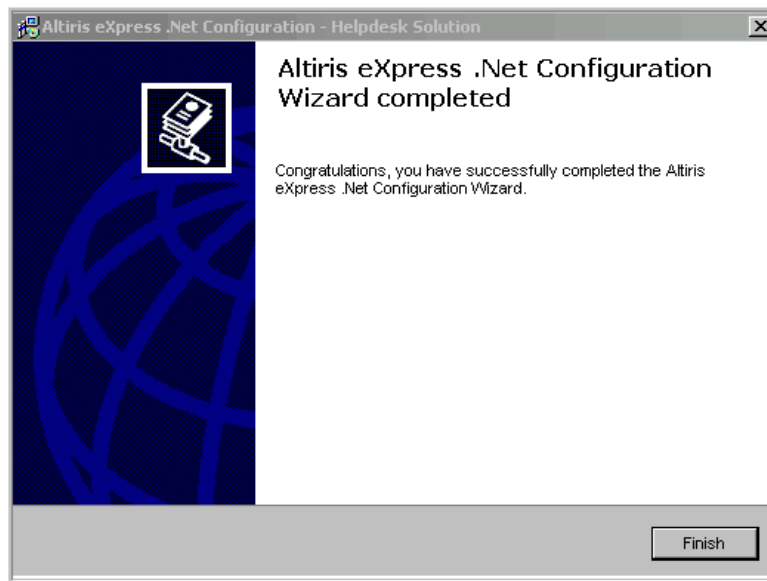
You have chosen to configure Helpdesk Solution to run under the identity kathi-server\admin. The wizard is now ready to commit the changes. If you would like to make change to these settings press the back button now.

NOTE: This option will set ASP.NET to run under the SYSTEM identity. This will affect all ASP.NET applications on this machine.

To commit these changes press the Next button

< Back Next > Cancel

- 6 Click **Next**



7 Click **Finish**.

When the wizard is complete, the **Helpdesk Admin console** will launch. Usually, further configuration is necessary, so you will see the **Configure Helpdesk command**. Complete the command to finish the installation. See [“Configure Helpdesk”](#) on page 128 for details.

Note When Helpdesk Solution is installed, all Notification Policies are disabled by default. You will want to review and disable any unneeded policies to prevent excess notifications. For information on policies, see [“Notification Policies”](#) on page 140.

During the initial installation, the user installing Helpdesk, creates the first worker with his or her NT ID; they can create new workers when the installation process is complete. See [“Workers”](#) on page 135 for details.

Modifying Helpdesk Solution Installation Configuration

After the initial installation, you can run the **Helpdesk ASP.NET Configuration Wizard** to change your Helpdesk Solution identity at any time.

- 1 Click **Start** and select **Programs > Altiris > Altiris eXpress > Helpdesk Solution > Helpdesk ASP.NET Config**.
- 2 Make the appropriate changes and complete the wizard.

Upgrading Releases

Upgrading released version of Helpdesk Solution can be done by doing an upgrade check in the Solution Center. This will install over the top of the existing software. Downloading the latest AeXHD.exe and running it manually will upgrade Helpdesk Solution also. If you use "**Add/Remove Programs**" to remove the previous version of Helpdesk, any customization to the web site you made may be lost and have to be reconstituted.

Upgrading an interim development database is not supported, and requires the creation of a new database. An interim development database is defined as any database created by a non-released version of Helpdesk Solution.

Interim builds during beta testing should be removed using the "**Add/Remove Programs**" in the operating system. Subsequent builds can then be installed once the previous build has been removed.

Anytime Notification Server is being updated to a newer version along with Helpdesk Solution, Notification Server should be upgraded before upgrading Helpdesk Solution.

IMPORTANT Beta releases are always required to be installed on test servers and kept separate from released production installations of Helpdesk Solution.

Uninstalling

You can use **Add/Remove Programs** in the **Windows Control Panel** to uninstall the Altiris eXpress Helpdesk Solution.

We recommend stopping and restarting IIS before you uninstall Helpdesk Solution. This will provide a cleaner uninstall.

Note Restarting IIS will cause current users to lose their work.

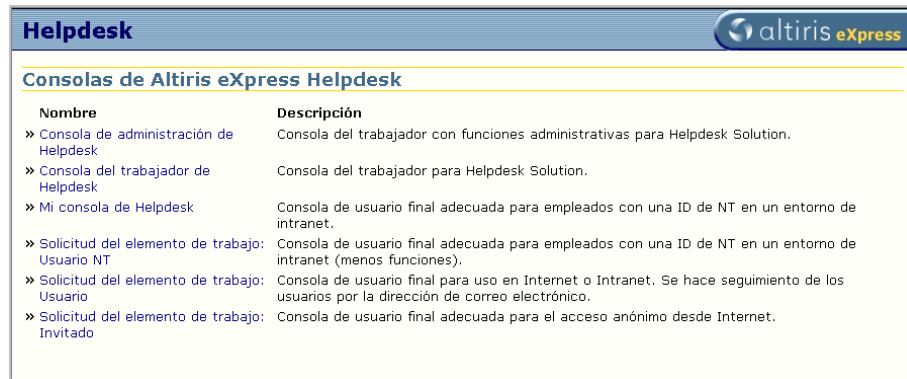
If you added files to the Helpdesk Solution custom directories, they will not be deleted by Uninstall, but any files installed by the Setup program that you modified will be deleted.

Uninstall does not delete or modify data or tables in SQL Server databases, nor does it delete all Helpdesk Solution registry settings. If you reinstall, you will be presented with the previously configured SQL Server and database, and the Helpdesk license data is not removed from Notification Server.

Localization

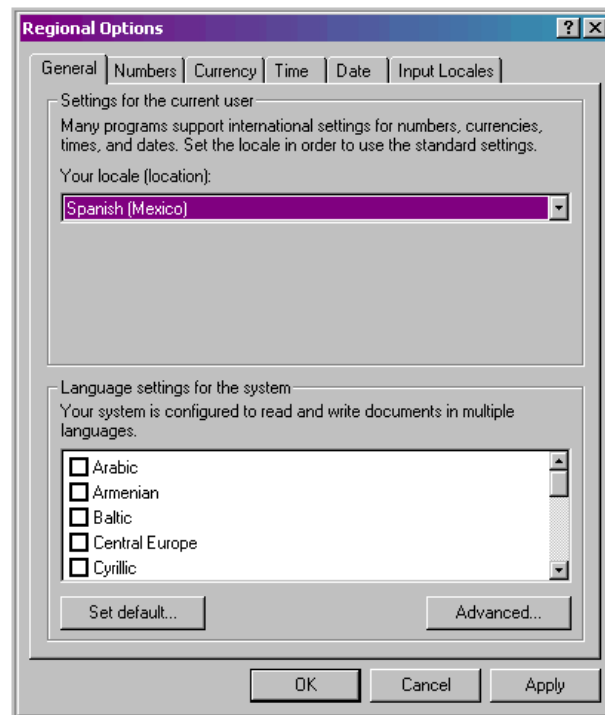
Helpdesk Solution 5.6 supports localized versions of French, German, Portuguese and Spanish. Assuming the browser is installed and properly configured, Helpdesk will automatically display its content in the preferred language configured by the browser. All text in the user interface will be localized to the above specified languages; however, database values in the drop-down lists, work item titles and comments will not. Information from other components, such as error messages from SQL Server, is displayed in the configured language of the server or will be in English, depending on how other components were installed.

Note You must change the locale setting of the computer to view the language in Internet Explorer 5.5 or later.



Configure Regional Option

1 Click **Start>Settings>Control Panel>Regional Options**.



Worker Console

- Microsoft Internet Explorer 6.0 or later, Netscape Navigator 3.0 or later, Opera 4.0 or later

End User Console

- Although Helpdesk Solution works from any web browser, it works best with Internet Explorer 6.0 or later
- 2 Select the one of the supported languages from the drop-down list.
 - Spanish
 - French
 - German
 - Portuguese
 - 3 Click **Apply**, then **OK**.
 - 4 The changes will take affect when you refresh or launch the web browser.

Chapter 5:

Configuration

The **Configuration** topic list, includes the following:

- [Web Administration Console Interface Elements \(page 35\)](#)
 - [Policies \(page 35\)](#)
 - [Reports \(page 36\)](#)
- [Console Security \(page 36\)](#)
 - [Administrators \(page 37\)](#)
 - [Workers \(page 37\)](#)
 - [End Users \(page 38\)](#)
 - [Setting Permissions \(page 39\)](#)
- [Entry Points \(page 40\)](#)
- [Licensing \(page 43\)](#)

Web Administration Console Interface Elements

Policies

Helpdesk Solution comes with Notification Policies that let Notification Server perform a variety of actions when defined conditions occur.

Notification Policies provide active reporting for the NS Client. They can be found in the Notification Server Web Administration Console under the **Solutions** tab, then **Helpdesk Solution > Policies > Notification Policies**.

For more information on using Notification Policies, see the *Altiris eXpress Notification Server User Guide*.
Altiris eXpress Notification Server User Guide.

The following are the provided Notification Policies:

- Escalate work item priority status
- High priority items not assigned within 30 minutes
- More than N open work items
- More than N open work items in level 1
- More than N open work items in level 2
- Open work items with no activity in over N minutes
- Re-opened work items
- Scheduled work items past due
- Scheduled work items past start date
- Top N new work items opened in M minutes
- Work items on hold more than N days
- Work items open more than N days
- Work items with more than N workers
- Workers with more than N open work items

Reports

Helpdesk Solution has many reports that let you analyze your help desk, including cost analysis, work item information, and worker performance. These reports are found in the **Notification Server Web Administration Console** under the **Solutions** tab by selecting **Helpdesk Solution > Reports**. The reports are organized into the following categories:

- **Cost Analysis** - Analyze costs of work items to evaluate expenses by location, organization, and operating system platform.
- **Helpdesk Activity** - Report help desk activity.
- **High Priority** - Report on high priority work items.
- **List Work Items** - List work items by end user, computer, or worker.
- **Planned Work** - Planned work reports help organize scheduling work items according to workers and computers. You can view work items planned and scheduled, over-due, by worker schedule, etc.
- **Problem machines/platforms/users** - Correlate Helpdesk work items with inventory.
- **Service Level Agreement** - Reports that help you meet the demands of your Service Level Agreement.
- **Track changes, moves, adds** - Reports to track changes to computers.
- **Work item Activity Trend** - Work item activity and trend analysis reports.
- **Worker Performance** - Worker activity reports.

Console Security

This section contains the following security topics:

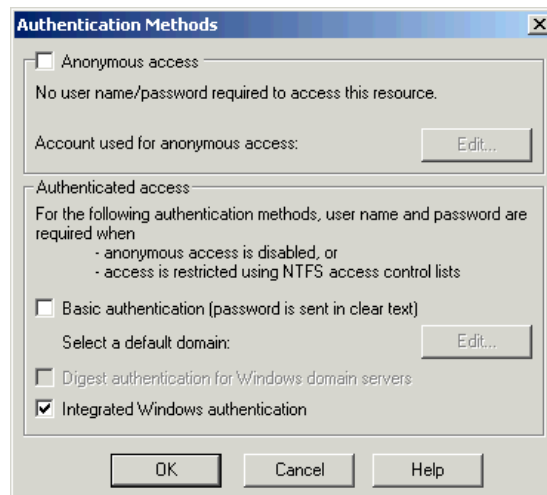
- [Administrators](#)
- [Workers](#)
- [End Users](#)
- [Setting Permissions](#)
- [Entry Points](#)

Helpdesk Solution relies on the security features provided by IIS, NTFS and ASP.NET to control access to Helpdesk consoles and commands. A Helpdesk console is defined by a **default.aspx** file and a **web.config** file that resides in a directory in the AeXHD web. We call these directories *entry points* to distinguish them from other AeXHD web folders that contain static content, such as images or help files. While it is possible to define security settings on specific files, we recommend defining security settings on entry points. Multiple consoles can exist in the same entry point and will therefore share the same security settings.

The IIS security settings for an entry point can be changed by doing the following:

- 1 Access **Internet Services Manager**.
- 2 In the left pane, select **server name>Default Web Site>AeXHD>**.
- 3 Right click on a folder name (for example: admin) and select **Properties**.
- 4 Click the **Directory Security** tab, then click **Edit** for Anonymous access and authentication control.

- 5 Click **Help** to access help on these items. See “[Administration](#)” on page 95 for details.



- **Anonymous access** - Users can submit anonymous requests. Helpdesk will use a guest worker account for these requests. It is important to not enable this for consoles or folders that contain important Helpdesk commands like the Admin and Worker consoles. Instead, only consoles that offer limited functionality, such as the Guest console, should be configured to permit anonymous access.
- **Basic authentication** - Workers can submit their identification (domain\username) and a password to be authenticated. Passwords are not transmitted using encryption, therefore we do not recommend this method under normal circumstances; however, if Basic Authentication is not enabled then Netscape and Opera users cannot connect to the Helpdesk Worker or Admin entry points.
- **Integrated Windows Authentication** - This uses a cryptographic exchange with the user's Internet Explorer web browser to confirm the identity of the user. You should always configure every entry point to allow Integrated Windows authentication even if you do not expect the users of the consoles in that entry point to use it.

We recommend that all environments use **Integrated Windows Authentication** for tighter security.

Workers with Internet Explorer 4.01 (or higher) can pass their login credentials without any prompting. If IIS cannot authenticate the user logged in, then a dialog is displayed asking for a new NT credential. Passwords are not transmitted in the clear.

Workers with other browsers (Netscape, Opera) will see a dialog asking for an NT domain\username and a password (basic authentication). Because passwords are passed in the clear, we do not recommend using either Netscape or Opera.

Administrators

Helpdesk administrators are workers who have IIS and NTFS access to the AexHD\Admin console entry point. The **Admin console** defined in the Admin entry point contains all the administrative functions that Helpdesk provides. Integrated Windows authentication is enabled for the Admin console entry point.

See “[Administration](#)” on page 95 for details.

Workers

Workers are users who have been added to the Helpdesk database and created as workers by a Helpdesk administrator using the **New worker** command. Workers are identified by their NT domain\username and e-mail address.

The Worker entry point is through the **Worker console**, which contains all the Helpdesk functionality needed to manage work items, assets and contacts.

End Users

Helpdesk Solution installs three different entry points and consoles for end users. The winuser entry point contains two consoles, **My Helpdesk** and **NT User**, for users authenticated by the **Integrated Windows Authentication**. These consoles map users to a Helpdesk contact record in the Helpdesk database.

The **User console** uses an e-mail address and a Helpdesk-only password to allow end users to create work items and view previously created work items. These users are mapped to Helpdesk contacts and therefore can participate in e-mail notification and other Helpdesk activities. **Anonymous** access and **Integrated Windows Authentication** are enabled for this entry point. These Helpdesk passwords are not secure and are not required.

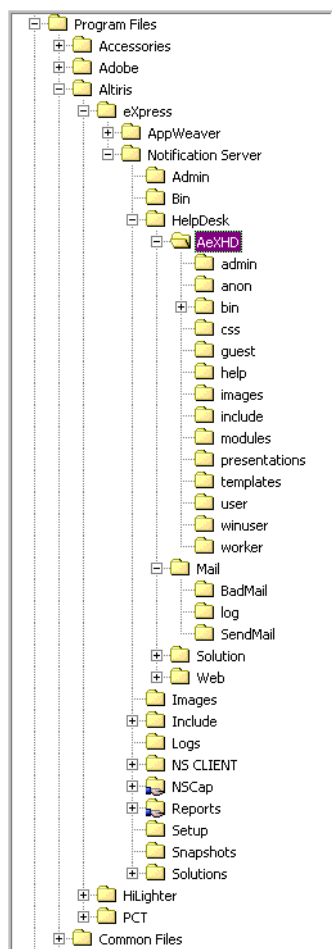
The **Guest console** collects no special information and displays a simple create work item interface. **Anonymous** access and **Integrated Windows Authentication** are enabled for this entry point.

The purpose of the **Work Item Request - Guest Console** is to allow non-workers the ability to create work items that can be reviewed and assigned by workers. Therefore the special worker "guest" will be the worker that appears in the "Created by" field for all work items created using the **Work Item Request - Guest Console**.

Setting Permissions

Once IIS has authenticated the requesting user, then NTFS permissions on the directory holding the requested `default.aspx` file is checked to determine if the user has NTFS read permissions for the file (usually inherited from the directory). If so, the request is allowed to proceed and a response page will be generated.

The directories and files being discussed are installed in the web directory created under the installation location. Following is the directory structure.



Altiris recommends creating local NT groups on the server with IIS, adding domain accounts to those groups, then giving each group appropriate permissions on each of the five entry point subdirectories.

To set Web Console permissions, do the following.

- 1 Create a local group for each class of user:
 - Administrator (Admin)
 - End User (User)
 - Worker (Worker)
 - End User (Guest)
 - End User (Anon)

Note These groups can be global groups in the domain or local groups on the Web server (recommended).

To create local groups, you use the **Computer Management** tool to create a group called **Administrator (admin)** and so on.

- 2 Add NT users to the appropriate groups. These can be NT domain users or groups or local users defined on the Web server.
- 3 Using **Windows File Explorer**, locate the physical directory location of the admin, worker, and other entry points.

Note By default, the setup creates these in the following location:

```
C:/Program Files/Altiris/eXpress/Notification Server/HelpDesk/AexHD
```

- 4 Right-click an entry point folder (i.e. **Admin**).
- 5 Click **Properties**. This displays the property sheet for the folder.
- 6 Click the **Security** tab.
- 7 Remove unwanted access (i.e. **Everyone**) and add the appropriate groups (i.e. **Admins**).

Note The "Read" permission is sufficient.

With permissions set, when a user invokes a URL inside one of these entry points they must be logged on to NT as a member of the appropriate group or they will be prompted to log in. As previously mentioned, the `guest` and `user` entry points do not require an NT ID.

Note Login credentials are automatically provided by Internet Explorer so IE users will not be prompted for user information unless they are not a member of the correct group. Other browsers don't participate with NTLM and will always be prompted.

Entry Points

Helpdesk uses a number of custom elements in entry point `web.config` files to define the behavior of the Helpdesk consoles that are supplied through `default.aspx` pages inside the entry point.

However there is one exception - Helpdesk administrators may want to control how workers and users self-enroll into Helpdesk. How to do that is described below.

```
<configuration>
  <appweaver.net>
    <consoles>
      <console>
        <command/>
      </console>
    </consoles>
  </appweaver.net>
  <helpdesk.net>
    <console.configuration/>
    <credential/>
  </helpdesk.net>
</configuration>
```

The `<appweaver.net>` element and its children define what consoles are available in that entry point and what commands are available in those consoles.

The `<helpdesk.net>` element has two children that are described below:

<console.configuration>

This element has two or three attributes:

- **allowDatabaseConfig**

Legal values are "yes" or "no".

The value "yes" means that workers who use this entry point will be able to attempt to configure the Helpdesk database by running a Helpdesk configuration command defined in the console. This command will be run whenever Helpdesk determines it is not correctly configured - usually when the application starts after an installation or upgrade. By default only the Admin entry point and console has this value set to "yes." It is dangerous and unhelpful to allow non-admins access to this command.

The value “no” means that database configuration is not possible through this console. Helpdesk will display an error instead of displaying the **Helpdesk configuration page**.

The value “yes” means that the `databaseConfigCmd` attribute must be present.

The value “no” means the error display command must be named in the `denyCmd` attribute.

- **databaseConfigCmd**

The value of this attribute must match the value of an id attribute of a `<command>` element defined in same web.config file. It should always refer to the ConfigureHelpdesk templated command. This attribute is only necessary when `allowDatabaseConfig` is set to “yes.”

- **denyCmd**

The value of this attribute must match the value of an id attribute of a `<command>` element defined in same web.config file. Typically this command should refer to the Deny module. It is required when `allowDatabaseConfig` is set to “no.”

- **sessionTimeout**

The value of this attribute must be an integer greater than 0: “20” for example. This attribute is useful for consoles that do not have a keepalive mechanism to keep their IIS sessions alive: the user and winuser consoles use this attribute by default. The default session timeout is configured in the main `web.config` file and is initially set to 4 minutes.

<credential>

This element defines how workers and users are authenticated by Helpdesk after being authenticated or not by IIS and NTLM security. There is one required attribute: `workerMode`, and several other attributes that may or may not be required depending on the value of `workerMode`.

The five entry points/web.config files that ship with Helpdesk demonstrate all useful combinations of attributes.

workerMode=“worker”|“winUser”|“guest”|“user”

- **“worker”**

This mode requires users of the consoles defined in this entry point to be enrolled as workers in Helpdesk. The NT ID provided by the browser is used to identify the worker. Workers typically have access to the full functionality of Helpdesk except for administrative functions.

Other required attributes: `allowSelfEnrollment`, `selfEnrollmentCmd`, `denyCmd`.

- **“winUser”**

This mode requires users of the consoles defined in this entry point to be defined as contacts in Helpdesk. An NT ID provided by the browser through IIS Integrated Windows Authentication is required to identify the contact. Consoles defined using this mode usually have only limited Helpdesk abilities: to create new work items and to review and updates work items previously created by them. This mode is appropriate for end-users in an intranet environment where Integrated Window Authentication is available. Workers can use consoles with this credential also because workers are contacts with valid NT IDs. However, they will not be able to access full worker functionality.

Other required attributes: `allowSelfEnrollment`, `selfEnrollmentCmd`, `denyCmd`.

- **“guest”**

This mode is for completely anonymous access to Helpdesk to create new work items, for example, at a public walk-up kiosk. No authentication takes place and no contact information is created about the end-user using the console. Any information collected by commands in a “guest” mode console is typically inserted into the work item comment field to be interpreted by a worker.

There are **no** other required attributes.

- **“user”**

This mode allows the console to execute a login command to collect an email address and password to identify the end-user as a contact in the Helpdesk database before permitting access to the console. If a contact can be found and the optional password matches, the user is shown the console and can perform operations similar to those available in a **winUser-mode console**: create new work items with the end-user as the associated contact, review work items previously created, etc.

To speed up access to Helpdesk, administrators can set the **saveUserLoginCookie** attribute to “yes” to allow Helpdesk to place a cookie on the client browser that serves as a valid “user” mode credential. Then that user on that machine is not show the login command again after the first successful login.

“user” mode has five other required attributes: **userLoginCmd**, **saveUserLoginCookie**, **allowSelfEnrollment**, **selfEnrollmentCmd**, **denyCmd**.

allowSelfEnrollment="yes" | "no"

- “yes” means that Helpdesk will permit the user to add their contact and/or worker information to the Helpdesk database and then grant them access to the console. Helpdesk executes the command named in the selfEnrollmentCmd command.
- “no” means that users who cannot provide a valid credential: either an email address and password (“user” mode) or NT ID (“worker” or “winUser” mode) will be denied access to Helpdesk. Helpdesk will execute the command named in the denyCmd attribute.

Note *This is the only attribute that most Helpdesk administrators should ever directly change in the installed Helpdesk entry points.*

By default the Worker console does not allow self-enrollment. Some administrators may want to edit the worker/web.config file using Notepad or other text editor to change the allowSelfEnrollment from “no” to “yes” and save the file. This will cause Helpdesk to restart and apply the new setting. Administrators should be sure to limit access to the **Admin and Worker consoles** using NTLM and NT groups before enabling worker self-enrollment. After most the workers have been created, administrators should turn self-enrollment off again.

On the other hand, the User console allows self-enrollment by default. This permits end-users to create their own, possibly erroneous, contact records. Administrators can turn off self-enrollment by editing the User/web.config file, setting allowSelfEnrollment from “yes” to “no.” Then no end-users will be granted access to Helpdesk until their contacts are imported from an NS source or created manually. Note that the default password is the empty string, i.e., no password at all.

Passwords used by Helpdesk here are not and should not be NT or Active Directory passwords. They are stored as clear text in the database. Workers can view and edit these passwords in the Worker console.

selfEnrollmentCmd=" "

The value of this attribute must match the value of an id attribute of a <command> element defined in same web.config file.

denyCmd=" "

The value of this attribute must match the value of an id attribute of a <command> element defined in same web.config file.

userLoginCmd=" "

The value of this attribute must match the value of an id attribute of a <command> element defined in same web.config file. This attribute is valid only when workerMode=”user”. See the User/web.config file for a sample.

saveUserLoginCookie ="yes" | "no"

This attribute is valid only when **workerMode**="user." See the **User/web.config** file for a sample.

- “yes” means the e-mail address entered by the worker is stored in a cookie in the user’s computer. The cookie contains an integer. If the cookie is present then the login command is not executed and the Helpdesk console is displayed. The same user will not be prompted for login

credentials again until the cookie expires after one year. Users cannot decide whether to accept the cookie or not.

- “no” means Helpdesk will not write the user credential cookie. Users will see the login command every time they start a new Helpdesk session.

Note that Helpdesk requires that cookies be enabled at all times but does not write permanent cookies except for this one. This is a change from previous versions of Helpdesk, which managed several cookies.

Licensing

From the time you install this solution, you have 7 days to register the product and obtain an evaluation license from the Altiris web site.

For information on getting a license and how to purchase a product, see the *Altiris eXpress Getting Started Guide* or *Altiris eXpress Notification Server User Guide*.

Note To see how long you have before the trial license expires, in the eXpress Web Administrator, click on the **Licensing** tab, and look at the **Expires** column. Helpdesk will also display trial license information in a yellow banner at the top of the each page of output.

Chapter 6:

User Interface

The **User Interface** topic list, includes the following:

- [Altiris eXpress Helpdesk Consoles \(page 46\)](#)
 - [Helpdesk Worker Console \(page 47\)](#)
 - [Default Page Description \(page 47\)](#)
 - [Commands \(page 47\)](#)
 - [Common tasks \(page 48\)](#)
 - [Toolbar Description \(page 48\)](#)
 - [Item Count, Date and Time \(page 49\)](#)
 - [Bulletins \(page 49\)](#)
 - [The Worker Report \(page 49\)](#)
 - [View or Edit Work Items \(page 53\)](#)
- [New Work Item \(page 50\)](#)
 - [Toolbar Description \(page 48\)](#)
 - [Work Item Page Description \(page 51\)](#)
 - [Add New Work Item \(page 52\)](#)
 - [View or Edit Work Items \(page 53\)](#)
 - [Additional Work Item Information \(page 54\)](#)
- [Attachments \(page 55\)](#)
 - [Attach Page Field Description \(page 56\)](#)
- [Link Work Items \(page 56\)](#)
 - [Link Page Field Description \(page 57\)](#)
- [E-mail Messages \(page 58\)](#)
 - [E-mail Page Field Description \(page 59\)](#)
- [View Contact Properties - New Work Item \(page 59\)](#)
 - [Contact Page Field Description \(page 60\)](#)
- [Find Contact - New Work Item \(page 61\)](#)
- [Select Contact - New Work Item \(page 62\)](#)
- [View Asset Properties - New Work Item \(page 63\)](#)
 - [Asset Page Field Description \(page 64\)](#)
- [Find Asset - New Work Item \(page 64\)](#)
- [Select Asset - New Work Item \(page 65\)](#)
- [Find Work Items \(page 66\)](#)
 - [Find Work Items - Simple Tab \(page 66\)](#)


- [Find Work Item Simple Field Description](#) (page 67)
- [Find Work Items - Advanced Tab](#) (page 68)
- [Find Work Item Advanced Field Description](#) (page 69)
- [Search in Comment or Title Field](#) (page 69)
- [Using Queries](#) (page 70)
 - [List Query](#) (page 71)
 - [List Query Page Field Description](#) (page 71)
 - [New Query](#) (page 71)
 - [Modify New Query Search](#) (page 72)
 - [New Query Page Field Description.](#) (page 73)
 - [Query Data Types](#) (page 73)
 - [Query Parameter Replacement](#) (page 76)
 - [Delete Queries](#) (page 78)
 - [Last Query Results](#) (page 79)
- [Retrieve Queued Item](#) (page 80)
- [Contacts](#) (page 80)
 - [Contacts Home](#) (page 80)
 - [View Contacts](#) (page 81)
 - [Find Contacts](#) (page 81)
 - [Find Contacts Page Field Description](#) (page 82)
 - [New Contact](#) (page 82)
 - [New Contact Page Field Description](#) (page 83)
- [Assets](#) (page 84)
 - [Assets Home](#) (page 84)
 - [View Assets](#) (page 84)
 - [Find Assets](#) (page 85)
 - [New Asset](#) (page 85)
 - [New Asset Page Field Description](#) (page 86)
- [Recents](#) (page 87)
- [My Helpdesk Console](#) (page 88)
 - [My Helpdesk - New Work Item](#) (page 89)
 - [Sort Work Item List](#) (page 89)
 - [Edit My Info](#) (page 90)
 - [Logoff](#) (page 91)
- [Work Item Request - NT User](#) (page 91)
- [Work Item Request - User](#) (page 92)
- [Work Item Request - Guest](#) (page 92)
- [Create Custom URL to Access Helpdesk Consoles](#) (page 93)
- [Support for Pocket PC \(PPC\)](#) (page 94)

Altiris eXpress Helpdesk Consoles

This section details the features and functionality of how to use Helpdesk consoles.

Server Access

- 1 Click **Start > Programs > Altiris > Altiris eXpress > Helpdesk Solution > Helpdesk Consoles**.
- 2 Select on of the following options:

Helpdesk	
	
Altiris eXpress Helpdesk consoles	
Name	Description
» Helpdesk Admin console	Worker console with administrative functions for the Helpdesk Solution.
» Helpdesk Worker console	Worker console for the Helpdesk Solution.
» My Helpdesk console	End-user console appropriate for employees with an NT Id in an intranet environment.
» Work item request - NT User	End-user console appropriate for employees with an NT Id in an intranet environment (fewer features).
» Work item request - User	End-user console for internet or intranet use. Users are tracked by e-mail address.
» Work item request - Guest	End-user console appropriate for anonymous access from the Internet.

Client Access

Helpdesk workers access the **Helpdesk console** interface by typing the URL in the address box of the internet browser.

- **Altiris eXpress Helpdesk consoles** - <http://<server name>/aexhd/>
- **Helpdesk Admin console** - <http://<server name>/aexhd/admin/Default.aspx>
- **Helpdesk Worker console** - <http://<server name>/aexhd/worker/Default.aspx>
- **My Helpdesk console** - <http://<server name>/winuser/Default.aspx>
- **Work item request - NT User** - <http://<server name>/winuser/NTUser.aspx>
- **Work item request - User** - <http://<server name>/winuser/Default.aspx>
- **Work item request - Guest** - <http://<server name>/aexhd/guest/Default.aspx>

Replace *server name* of the URL with the server name provided by the System Administrator. Using Integrated Windows Authentication requires workers to be logged in to the client computer using their NT account.

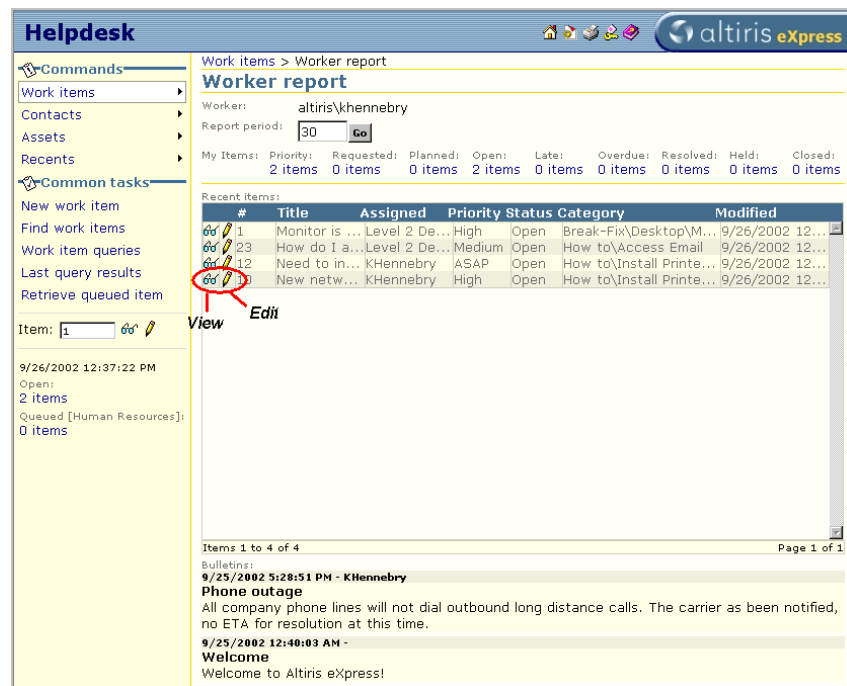
Note You can simplify access to the worker consoles by creating a URL alias shortcut. To create a URL alias shortcut, see [“Create Custom URL to Access Helpdesk Consoles”](#) on page 93.

Helpdesk Worker Console

Default Page Description

The **Helpdesk worker console** displays the **Work report** as the default page. The left-hand menu page is divided into three sections, **Commands**, **Common tasks** and the **Item and Count** section. The first two sections consist of links in cells that display additional menus ("fly-out" menus) when the cursor hovers over them. Cells with a right-pointing arrow will open to display the additional commands. Clicking on the link instead of hovering will execute the first command in the fly-out.

Each menu link and its fly-out menus (if any) is described below:



Commands

Work Items

Worker report - Default page for the Helpdesk Worker console.

New work item - Lets workers create a new work item. See "[New Work Item](#)" on page 50.

Find work items - Lets workers find work items using simple or advanced searches. See "[Find Work Items](#)" on page 66.

Queries - Lets worker execute existing queries and create custom queries. See "[Using Queries](#)" on page 70.

Last query results - Displays the results of the last query executed. See "[Last Query Results](#)" on page 79

Retrieve queued item - Lets workers retrieve queued items. See "[Retrieve Queued Item](#)" on page 80

Contacts

Contacts home - Displays a list of contacts. See "[Contacts Home](#)" on page 80

Find contacts - Lets workers find contacts by entering a search criteria. See "[Find Contacts](#)" on page 81

New contact - Lets workers add a new contact record. See "[New Contact](#)" on page 82

Assets

Asset home - Displays a list of assets. See “[Assets Home](#)” on page 84

Find assets - Lets workers find assets by entering a search criteria. See “[Find Assets](#)” on page 85

New asset - Lets workers add a new asset. See “[New Asset](#)” on page 85

Recent

Work items - Displays last **work item** entered by Helpdesk worker. See “[View or Edit Work Items](#)” on page 53

Contacts- Displays last **Contact** entered by Helpdesk worker. See “[Contacts](#)” on page 80

Assets - Displays last **Asset** record entered by Helpdesk worker. See “[Assets](#)” on page 84

Common tasks

New work item - Lets a worker add a new work item. See “[New Work Item](#)” on page 50.

Find work items - Lets a worker find work items using simple or advanced searches. See “[Find Work Items](#)” on page 66.

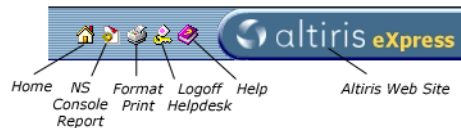
Work item queries - Displays the query list. See “[List Query](#)” on page 71.

Last query results - Displays the results of the last query. See “[Last Query Results](#)” on page 79

Retrieve queued item - Lets a worker retrieve queued items. See “[Retrieve Queued Item](#)” on page 80

Toolbar Description

The icons located in the upper right hand corner of the **Worker console page** represents the following tasks.



Home - Returns the worker back to the **Worker console page**.

Notification Server Console Report - Link to **Notification Server Web Reports**

Format for print - Converts the screen text into a printable format within the browser. The last command is displayed without the fly-out menu and banner.

Logoff Helpdesk - Logs the worker off the Helpdesk system.

Help - Opens online searchable Helpdesk files.

Altiris eXpress logo - Link to the Altiris web site, www.altiris.com.

Item Count, Date and Time

The item box, current date and time, open item count and queued item count are displayed on the lower left hand side of the **Worker console page**.

Item:

9/19/2002 4:10:43 PM
 Open:
 0 items
 Queued [no queue]:

Item - Type the work item number you want to view or edit in the **Item** box.

View icon - Click to view the work item, whose number is in the **Item** box.

Edit icon - Click to edit the work item, whose number is in the **Item** box.

Date and time - Displays the current date and time of the Helpdesk server.

Open - Click the **item count** to display a list of open items assigned to you.

Queued [] - Click the **item count** to display a list of **work items** in the **Your retrieve queue**.

Bulletins

The bottom of the **Worker report** is reserved for bulletins. Bulletins keep workers and users updated on system maintenance, outages, pending problems or other Helpdesk information

Bulletins:
 9/25/2002 5:28:51 PM - KHennebry
Phone outage
 All company phone lines will not dial outbound long distance calls. The carrier as been notified, no ETA for resolution at this time.
 9/25/2002 12:40:03 AM -
Welcome
 Welcome to Altiris eXpress!

The Worker Report

Work items > Worker report

Worker report

Worker: altiris\khennebry

Report period:

My Items: **2 items** Priority: **2 items** Requested: **0 items** Planned: **0 items** Open: **2 items** Late: **0 items** Overdue: **0 items** Resolved: **0 items** Held: **0 items** Closed: **0 items**

#	Title	Assigned	Priority	Status	Category	Modified
1	Monitor is broken	Level 2 De...	High	Open	Break-Fix\Desktop\M...	9/26/2002 12...
23	How do I access my mail	Level 2 De...	Medium	Open	How to\Access Email	9/26/2002 12...
12	Need to install printer	KHennebry	ASAP	Open	How to\Install Printe...	9/26/2002 12...
10	New network printer needs...	KHennebry	High	Open	How to\Install Printe...	9/26/2002 12...

Worker - Displays the computer network ID and worker name using system.

Report period - Select the number of days to search back in time to view work items. There is no limit as how far back a worker can view items. Type the number of days in the box, then click **Go**.

Priority - Lists the number of work items with **High** or **ASAP** priority *and* **Open** status.

Requested - Lists the number of work items with status as “**Requested**”. Work items submitted by users from the **Work item request - User console** automatically receive a “**Requested**” status.

Planned - Lists the number of work items with the status as **Planned**. Work items can be scheduled for a future or planned date. This feature is helpful for administrators that want accurate reporting on work item activity and status.

Open - Lists the number of work items with the status as **Open**.

Late - Lists the number of work items **Planned** after the start date.

Overdue - Lists the number of work items not **Closed** or **Resolved** after the due date.

Resolved - Lists the number of work items with the status as **Resolved**. Work items can have a status of **Resolved** and still be open. Once verification is received, work items can be finalized with the **Closed** status.

Held - Lists the number of work items with the status as **Hold**.

Closed - Lists the number of work items with the status as **Closed**.

New Work Item

The **New work item page** lets you create a **New work item**. Workers can perform a variety of tasks to the item, such as: link work items together, associate assets and contacts to the work item, attach uploaded files to the work item, and send e-mail.

The screenshot shows the 'New work item' form with the following fields and options:

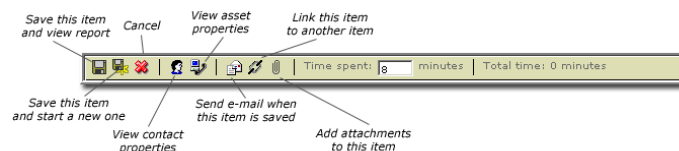
- Contact:** Dropdown menu set to '--[none]--' with a 'Find' button.
- Asset:** Dropdown menu set to '--[none]--' with a 'Find' button.
- Title:** Text input field.
- Comment:** Text area.
- Category:** Dropdown menu set to 'Not specified'.
- Priority:** Dropdown menu set to 'Medium'.
- Assigned:** Dropdown menu set to '--[auto]--'.
- Status:** Dropdown menu set to 'Open'.
- Type:** Dropdown menu set to 'Other'.
- External ID:** Text input field.
- Schedule:** Dropdown menu set to 'Not scheduled'.
- Start:** Date field set to '2/20/2003'.
- Due:** Date field set to '2/20/2003'.
- Notify rules:**
 - Acknowledge contact
 - Notify contact when closed
 - VIP work item
- Attachments:** List of attachments.
- Linked to:** List of linked items.
- Linked by:** List of linked items.

To Open a New Work Item

- 1 Click **Work items>New work item** listed below *Commands*. <OR>
- 2 Click **New work item** listed below *Common tasks*.

Toolbar Description

The following diagram describes the toolbar:



Work Item Page Description

Page Items

Item	Description
Title	Description of the problem or request.
Category	Categories are associated to a worker or queue.
Assigned	Worker or queue for the work item.
Priority	Priority status is low, medium, high and ASAP.
Status	Select a Status from the drop-down list. The default status is open.
Type	Type of work item.
Schedule	The work item can be a scheduled event.
Start	Type the work item start date or accept the default.
Due	Type the work item due date.
External ID	Type an External ID.
Comment	Type additional details or further explain the work item.
Notify rules	Notifications sent to workers, queues or other contacts to inform them of work items.
Attach	Attach files to a work item.
Attachments	List of files attached to a work item.
Linked to	List of other work items the current item is linked to.
Link	Click to link an existing work item to the current work item.
Linked by	Name of worker responsible for linking items.
E-mail	Set e-mail notifications for the current work item.
Save	Save work item changes.
Save and new	Save and start another new work item
Cancel	Discard the changes.
Time Spent (minutes)	The Time spent (minutes) working on the current work item starting from when the page is displayed. This number can be changed if other work has been performed not related the time spent using the Helpdesk work item user interface.
Total Time	Total time spent by all workers on this work item - the sum of all Time Spent values entered.

Add New Work Item

- 1 Type a description for the new work item in the **Title** box. The title is a required field. All the other fields are optional, or have default values.
- 2 Type additional **Comments** in the box.
- 3 Select a **Category** from the drop-down list.
- 4 Select the **Priority** status from the drop-down list.
- 5 Select an **Assigned** worker or queue to assign the work item to from the drop-down list. The default option of **--(unassigned)--** will automatically assign the work item to the worker or queue according to the Routing Rules defined.
- 6 Select the **Status** of the work item from the drop-down list.
- 7 Select the **Type** of work item from the drop-down list.
- 8 Type an **External ID** number in the box.
- 9 Select either **Scheduled** or **Not Scheduled** from the drop-down list.
- 10 Select a **Start** date for the work item, the default option is the current day. Click the box icon to the right of the date field to open the current calendar month and select the appropriate date. Click the box icon again to close the calendar window.
- 11 Select a **Due** date for the work item, the default option is the current day. Click the box to the right of the date field to open the current calendar month and select the appropriate date. Click the box again to close the calendar window.
- 12 Select any **Notify rules** check boxes that you want associated with this work item. Default rules will be pre-selected by the administrator. Additionally, the administrator can lock down notify rules to prevent workers from making any changes. These rules are evaluated and e-mail generated when the work item is saved.
- 13 Click **View contact properties** to view and edit the contact information associated with the work item. For more information, see [“View Contact Properties - New Work Item”](#) on page 59.
- 14 Click **View asset properties** to view and edit the asset information associated with the work item. For more information, see [“View Asset Properties - New Work Item”](#) on page 63.
- 15 Click **E-mail** to send an e-mail notifications about the current work item to other workers, queues or select individuals. For more information, see [“E-mail Messages”](#) on page 58.
- 16 Click **Link** to link the current work item to another work item. For more information, see [“Link Work Items”](#) on page 56.
- 17 Click **Attach** to add additional file information to the work item. For more information, see [“Attachments”](#) on page 55.
- 18 Click **Select a contact** to associate a contact with the current work item. For more information, see [“Find Contact - New Work Item”](#) on page 61.
- 19 Click **Select an asset** to associate an asset with the current work item. For more information, see [“Find Contact - New Work Item”](#) on page 61.
- 20 Click **Save**. The work item you created will display in the **View work item page**.
<OR>
- 21 Click **Save and start a new one**. The work item is saved, and the **New work item page** is displayed for you to create a new work item.

View or Edit Work Items

The **View work item page** allows you to review any work item added to the Helpdesk database. This page appears when you **Save** a new work item, or when you select a work item by clicking on the **glasses** icon. The work item number, used as reference for problem resolution and tracking purposes, is displayed in the upper left hand corner of the page. The information you entered when adding a **New work item**, in addition to the **History** of the work item, can be reviewed or edited.

View Work Item **View #3 - Driver Error** *Work Item Number and Title*

<< Previous Item not in last results Next >> **Edit**

Work item properties:

Item: #3 - Driver Error
 Contact: [none selected]
 Asset: [none selected]
 Category: Not specified
 Assigned: Kathi
 Schedule: Not scheduled Start: 2/10/2003
 Modified by: Kathi Modified: 2/13/2003 2:26:50 PM
 Type: Other
 Priority: Medium
 Due: 2/10/2003
 Created by: Kathi
 External ID:
 Status: Open
 Total time: 2
 Created: 2/10/2003 1:52:50 PM

Notify rules:
 Attachments:
 Linked to:
 Linked by:

Details

Modified	Modified by	Assigned	Category	Priority	Status	Type
2/13/2003 2:26	Kathi	Kathi	Not specified	Medium	Open	Other
2/10/2003 1:52	Kathi	Kathi	Not specified	Medium	Open	Other

2/13/2003 2:26:50 PM - Kathi - Edit
 I received a driver error when I loaded new software.

2/10/2003 1:52:50 PM - Kathi - Create
 My display screen shows a driver error?

To View or Edit Work Items

- 1 When you **Save** a new work item, or you select a work item to view, the **View work item page** appears.
- 2 Click **Details** to toggle between displaying or hiding the **History** of work items.
- 3 Click **Edit** to update or add work item information.

Additional Work Item Information

Workers can attach files, link work items together, and send an e-mail about the work item. Workers can also associate one **Asset** and one **Contact** to the work item and edit their respective data. Each of these options are available by clicking the appropriate icon on the toolbar of the **New work item** page.

Work items > New work item
New work item *E-mail, Link, or Attach*

Time spent: 41 minutes | Total time: 0 minutes

Contact: --[none]-- [Find] [E-mail]

Asset: --[none]-- [Find] [Link] [Attach]

Title: [Text Field]

Comment: [Text Area]

Category: Not specified

Type: Other External ID: [Text Field]

Assigned: --[unassigned]-- Priority: Medium Status: Open

Schedule: Not scheduled Start: 2/10/2003 Due: 2/10/2003

Notify rules:
 Acknowledge contact
 Notify contact when closed
 VIP work item

Attachments: [List Box]

Linked to: [List Box]

Linked by: [List Box]

See also

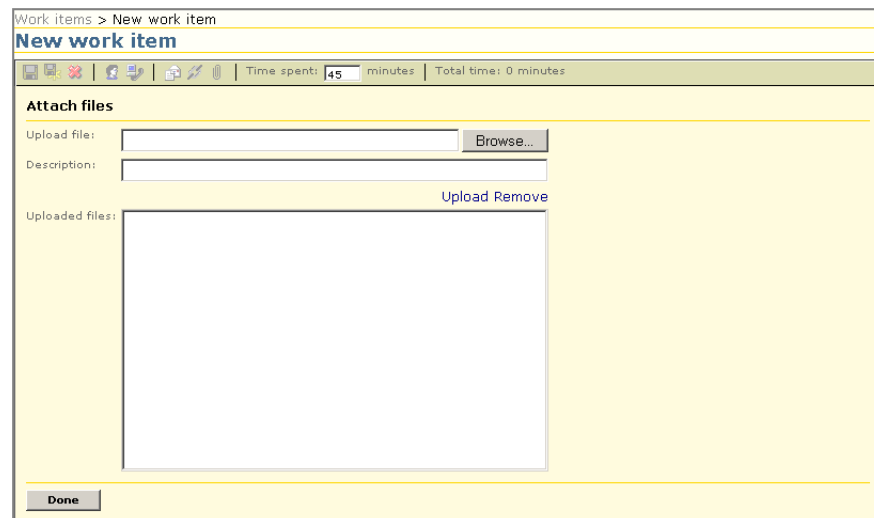
[Attachments](#) (page 55)

[Link Work Items](#) (page 56)

[E-mail Messages](#) (page 58)

Attachments

Helpdesk allows you to upload files and attach them to the work item. Workers or queues retrieving work items can use these files to debug and resolve the problems being reported. There is no limitation on file types that can be attached to work items; however, IIS limits the size of files that can be uploaded. Files that are too large will be rejected and an error message will be displayed. If needed, the IIS Administrator can increase the file size limit.



The screenshot shows a web browser window with the address bar displaying 'Work items > New work item'. The page title is 'New work item'. Below the title bar, there is a toolbar with various icons and a status bar showing 'Time spent: 45 minutes' and 'Total time: 0 minutes'. The main content area is titled 'Attach files' and contains the following elements:

- An 'Upload file:' label followed by a text input field and a 'Browse...' button.
- A 'Description:' label followed by a text input field.
- An 'Uploaded files:' label followed by a large empty rectangular box.
- Buttons labeled 'Upload' and 'Remove' positioned to the right of the 'Uploaded files' box.
- A 'Done' button at the bottom left of the page.

To Attach a File to a Work Item

- 1 Click **Work items>New work item**.
- 2 Click **Attach**.
- 3 Click **Browse** to navigate to the location of the file to attach. When you select a file to upload, the file path will appear in the **Upload file** box.
- 4 Type a description of the file to attach in the **Description** box.
Note If you type in the **Description** box, the text entered will display in the **Uploaded files** list box. If you leave the description box empty, the file name you uploaded will display in the **Uploaded files** list box.
- 5 Click **Upload** to attach the selected file.
- 6 If the files uploaded are not correct, highlight the file to discard and click **Remove**, the file will be deleted from the **Uploaded files** list box.
- 7 Click **Done** to return to the **New work item** page.

Note If no files are uploaded, deleted, or you clicked this page option in error, click **Done** to return to the **New work item** page. Only files you actually **Uploaded** or **Removed** on this page will affect the work item. Changes are not permanent until the work item itself is saved.

Attach Page Field Description

Page Items

Item	Description
Upload file	Browse to the location of the file to attach.
Description	Type a description for the file attachment.
Upload	Click Upload to attach file to new work item.
Remove	Click Remove to delete the file attachment from the Upload files list.
Uploaded files	Displays files attached to the new work item.
OK	Click OK to continue with work item.
Time Spent (minutes)	The time spent working on this work item. This number can be changed if there has been work performed while not in the console.
Done	Click to save the changes.

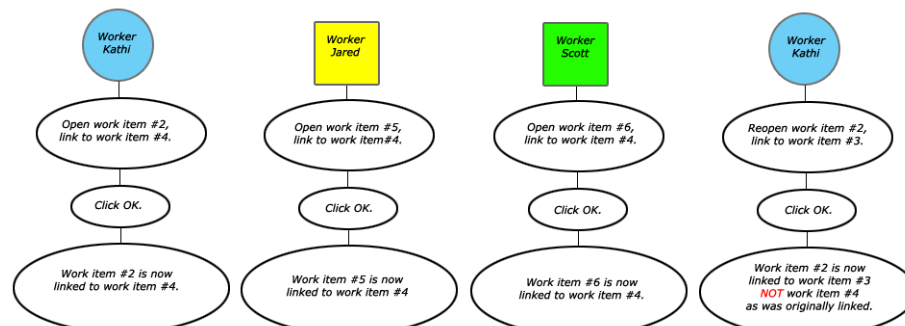
Link Work Items

A work item can link to *one* other work item, and *multiple* work items can link to the same work item. If a work item was previously linked, it will be overwritten by the last selected link item. To clarify this feature in more detail, be sure to read the scenario below.

Scenario

- Worker Kathi creates **work item #2** reporting a need to move a PC. **Work item #4** is referring to moving the same PC. Kathi links **work item #2** to **work item #4**.
- Worker Jared creates **work item #5** reporting computer equipment needs moving in the same office as **work item #4**. Jared links **work item #5** to **work item #4**.
- Worker Scott creates **work item #6** reporting a printer needs moving from one office to another, the same office move as stated in **work item #4**. Scott links **work item #6** to **work item #4**.
- Worker Kathi reopens **work item #2** to edit the record. **Work item #3** is another PC move for the same office as stated in **work item #2**. Kathi links **work item #2** to **work item #3**.
- The current **work item** open is linked to the most recently selected **work item** once the worker clicks the **OK** button.

Link Work Items Flow Chart



To Link a Work Item

- 1 Click **Work items> New work item**.
- 2 Click **Link**.
- 3 Click one of the following link item options:
 - **Keep current** - Default, **Not currently linked**.
 - **Link recent item** - Select a **Work item** from the drop-down list.
 - **Find item** - Type the title of the work item in the box, click **Find**.
 - Select a work item from the drop-down list.
 - **Item number** - Type the record number of the work item in the box.
 - **Remove current item** - Unlink a work item.
- 4 Click **OK**, the most recent work item selected will be linked.

Link Page Field Description

Page Items

Item	Description
Keep current	Default option, the current work item is not linked.
Link-recent item	Select a work item from the most recent drop-down list.
Find item	Search for work items, requires search criteria.
Item number	Type number of work item to link to.
Remove current item	Removes an attached work item.
OK	Click OK to continue with work item.
Time spent (minutes)	The Time spent (minutes) working on the current work item. This number can be changed if other work has been performed not related to the work item yet the work item is currently open on the screen.

E-mail Messages

E-mail messages can be sent to any worker, queue, or contact who has a valid e-mail address, as well as to any SMTP format e-mail addresses. These e-mails are delivered to the recipients specified as a part of the work item save process and can be requests from the worker updating the work item for additional information or to answer a question. E-mails are also sent when work items change using the Notify rules feature. See “[Notify Rules](#)” on page 112.

Work items > New work item

New work item

Time spent: 1 minutes | Total time: 0 minutes

E-mail a message to specified recipients

Send to: Current contact

These workers:

- Assigned worker
- Modified by worker
- Previously assigned worker
- Created by worker

These addresses:

JSmith@mycompany.com
Enter one or more e-mail addresses separated by ";"

E-mail templates: Work item correspondence
Select an e-mail template to use.

Message: Please review this work item

Done Clear

To Send E-Mail Messages

- 1 Click **Work items**> **New work item**.
- 2 Click **E-mail**.
- 3 Select the check box to send e-mail notification to the **Current contact**.
- 4 Select the check box for each additional worker, use the scroll-bar to view options.
- 5 Type a SMTP format e-mail address for each additional mail recipient in the box.
- 6 Select an **E-mail template** from the drop-down list.
- 7 Type a message in the text box.
- 8 Click **Done** to return to the **New work item page**.
- 9 Click **Clear** to discard changes.

E-mail Page Field Description

Page Items

Item	Description
Current contact	Select check box to e-mail current contact.
These workers	Select check box for all applicable workers.
These addresses	SMTP e-mail address of recipients, separated by semicolons: myname@mycompany.com;bas@buz.org
E-mail templates	Format of the body of the e-mail message. The Message field will be inserted into the body of the email as determined by the template chosen
Message	Main content of the e-mail notification. This is not the same as the work item comment.
Done	Save changes.
Clear	Clears the users selections from the page.

View Contact Properties - New Work Item

The **View contact properties** page displays is used to view and edit information about the contact associated with the current work item. The **Items** list at the bottom of the page, shows all work items that are associated with the same contact. You can update contact information or select a different contact from this page.

Time spent: 4 minutes | Total time: 3 minutes

Contact Select

Name: John Smith | NT ID: | EMail: JSmith@mycompany.com
 Pager eMail: | Phone: 801-123-4567 | Cell phone: |
 Pager: | Location: | Company: |
 Department: | Organization: --[none]-- | Title: Desktop Support
Select organization or type new one
 Employee ID: | Password: | VIP
 Comment:

Save Cancel

Items:

#	Title	Assigned	Priority	Status	Category	Modified
5	Cannot access e-mail server	Level 1	Medium	Open	Not specified	2/10/2003 2:00:21

List of items associated to John Smith

Items 1 to 1 of 1 | Page 1 of 1
 Rows per page: 50

To View Contact Properties

- 1 Click **Work items** > **New work item**.
- 2 Click **View contact properties**.
- 3 If the information on the page needs updating; or, you want to select a different contact, click **Select** to find a contact from the Helpdesk's database. When you select a contact, the information will populate this page.
- 4 Update the form on the page as needed, and then click **Save**.

Contact Page Field Description

Page Items

Item	Description
Name	Type the Name of the new contact.
NT ID	Type the NT ID of the new contact.
E-mail	Type the E-mail address of the new contact.
Pager e-mail	Type the Pager e-mail address of the new contact.
Phone	Type the Phone Number of the new contact.
Cell phone	Type the Cell Phone number of the new contact.
Pager	Type the Pager number of the new contact.
Location	Type the Location where the new contact resides.
Company	Type the Company name of the new contact.
Department	Type the Department name of the new contact.
Organization	Select Organization from the drop-down list.
Title	Type the Title of the contact's position.
Employee ID	Type the Employee's ID .
Password	The contact's Helpdesk password. This should NOT be set to the contact's NT password.
VIP	Check the box to indicate VIP status.
Comment	Any additional free-form information about the contact. This is a general purpose property of a contact but can be used to specify a question or answer pair known only by the contact in the even that they have forgotten their password.
Save	Click to Save the changes. Changes to the contact are saved even if you cancel the work item later.
Cancel	Click to cancel any edits made on the page. The work item itself is not cancelled.

Find Contact - New Work Item

The **Find** feature on the **New work item** page, allows users to enter a partial **name** or **phone number** (this is configured by Professional Services) into the **Find** text box, and then click **Find**. The text pattern can be any valid expression supported by Transact SQL LIKE, such as %, _, [], [^]. For example, to search for all contacts named John, you could specify the pattern “John%”. The search pattern will only be used to find active contacts.

As an added convenience, the **Find** option will prefix and suffix the pattern entered in the text box, with “%” if a % symbol is not detected in the pattern. This will result in a slower search performance as a table scan is performed. If a search pattern is not specified when **Find** is clicked, the user will be presented with a validation message.

If one or more contacts match the specified pattern, then the contact drop-down list will be populated. Additionally, a results count option will be added and automatically selected to indicate the number of matches.

The screenshot shows the 'New work item' page with the following details:

- Page title: Work items > New work item
- Section title: New work item
- Time spent: 1 minutes | Total time: 0 minutes
- Contact field: A dropdown menu is open, showing two results: 'John Deer - [phone unspecified]' and 'John Smith - 801-123-4567'. The search input contains 'john%' and a 'Find' button is next to it.
- Asset field: A dropdown menu is open, showing two options: '--[select (2 found)]--' and '--[none]--'. A 'Find' button is next to the search input.
- Title field: A text input field containing the selected contact information.

The data presented in the drop-down list will be a combination of the contact’s **name** and **phone number**. If a phone number is not specified for the contact, the text message **[phone unspecified]** will be displayed next to the contact’s name.

The contact selected from the drop-down list, will be the contact that is associated with the work item when it is saved. If “--[none]--”, or the result count option (--[select (2 found)]--) is selected, then no contact will be associated with the item. If a contact and asset are specified when an item is saved, then a contact-asset association will automatically be made. This association will be used for the auto-association feature.

Auto-Associating an Item’s Asset Using the Contact

When a contact is selected, the system will determine if there are any assets associated with the contact. This is done only if an asset has not been selected from the **Asset** drop-down list. The **asset** drop-down list will be populated with any assets associated with the contact, and the first contact is arbitrarily selected. Auto-association is attempted if a contact is selected from the **Contact** drop-down list from the **New work item** page, or in any operation that results in a contact being selected from the **Select a contact page (New contact, Recent contact and Find contact)**.

To Find a Contact

- 1 Enter a partial name or phone number into the **Find** text box, and then click **Find**.
- 2 When the search results appear, click the **Contact** drop-down arrow and select a contact.

Select Contact - New Work Item

The **Select a contact** page allows workers to associate the current work item with a specific contact. Workers can select from one of six options. The find option will only display those contacts already in the Helpdesk system.

To Select a Contact

- 1 Click **Work items> New work item**.
- 2 Click **Select a Contact**.
- 3 Click one of the following options:
 - **Keep current contact**
 - **Remove current contact**
 - **New contact**
 - **Contact associated with current asset**.

The drop-down list displays the contacts who have been associated with the currently selected asset.

- **Recent contact**.
 - **Find contact**
 - Type search criteria in any of the text boxes, click **Find** at the bottom of the page.
 - From the drop-down list below **Find**, select a **contact** from the list of results.
- 4 Click **Properties**, to go to the **Contact page**. You can **Edit** the selected contact's information, or you can add a **New contact** altogether.

Note The **Properties** button controls whether or not the next page will be the **New work item page** or the **Contact properties page**. The only exception is when the **New contact** option is selected, in which case, both **OK** and **Properties** will take the user to the **Contact properties page**.

- 5 Click **OK**, the selected contact will be associated with the work item.

View Asset Properties - New Work Item

The **View asset properties** page displays an **Asset** form used to view and edit information about the asset associated to the current work item. The **Items** list at the bottom of the page shows all work items currently associated with the same asset.

Work items > New work item

New work item

Time spent: 4 minutes | Total time: 0 minutes

Asset Select

Name: Type: External ID:

Location: Manufacturer: Model:

Serial #: Asset tag: IP address:

Organization:

Select organization or type new one

Comment:

Items:

#	Title	Assigned	Priority	Status	Category	Modified
5	Monitor screen is blue	Level 1	Medium	Open	Not specified	2/10/2003 2:14:14

List of items associated with the asset, Monitor

Items 1 to 1 of 1 Page 1 of 1

Rows per page: 50

To View Asset Properties

- 1 Click **Work items > New work item**.
- 2 Click **View asset properties**.
- 3 If the information on the page needs updating; or, you want to select a different asset, click **Select** to find an asset from the Helpdesk's database. When you select an asset, the information will populate this page.
- 4 Update the form on the page as needed, and then click **Save**.

Asset Page Field Description

Page Items

Item	Description
Name	Type a short description of the asset.
Type	Select a category Type from the drop-down list.
External ID	Type an External ID . An External ID is appropriate for organizations managing external customers who need to identify the external customer with a unique ID.
Location	Type the physical Location of the asset.
Manufacturer	Type the Manufacturer of the asset.
Model	Type the Model type of the asset.
Serial #	Type the Serial # of the asset
Asset Tag	Type the number of the asset tag.
IP Address	Type the IP address of the asset.
Organization	Select Organization from the drop-down list.
Status	Select Status from the drop-down list.
Comment	Any additional free-form information about the asset.
Items	List of Work items associated with the asset.
Save	Click to Save the changes.
Cancel	Click to abort function.

Find Asset - New Work Item

The **Find** feature on the **New work item page**, allows users to enter a partial **name** or **location** (this is configured by Professional Services) into the **Find** text box, and then click **Find**. The text pattern entered, can be any valid expression supported by Transact SQL LIKE, such as %, _, [], [^]. For example, to search for all contacts named John, you could specify the pattern "John%". The search pattern will only be used to find active assets.

As an added convenience, the **Find** option will prefix and suffix the pattern entered in the text box, with "%" if a % symbol is not detected in the pattern. This will result in a slower search performance as a table scan is performed. If a search pattern is not specified when **Find** is clicked, the user will be presented with a validation message.

If one or more contacts match the specified pattern, then the contact drop-down list will be populated. Additionally, a results count option will be added and automatically selected to indicate the number of matches.

The screenshot shows the 'New work item' page with the following fields and values:

- Contact:** --[none]--
- Asset:** --[select (2 found)]-- (dropdown menu is open showing results)
- Title:** --[select (2 found)]--
- Comment:** John-Server - Lindon
JohnTestPC - [location unspecified]

The search input for 'john' is in the Asset field, and the 'Find' button is visible next to it. The dropdown menu shows two results: 'John-Server - Lindon' and 'JohnTestPC - [location unspecified]'.

The data presented in the drop-down list will be a combination of the asset's **name** and **location**. If a location is not specified for the asset, the text message **[location unspecified]** will be displayed next to the asset's name.

The asset selected from the drop-down list, will be the asset that is associated with the work item when it is saved. If "--[none]--", or the result count option (--[select (2 found)]--) is selected, then no asset will be associated with the item.

When an asset is selected, the resource explorer and remote control image icons, may or may not be visible and enabled. The remote control icon will be visible if the selected asset is a computer *and* when the Altiris Carbon Copy Solution is installed. The resource explore icons will be enabled if the selected asset was imported from a NS source.

If a contact and asset are specified when an item is saved, then a contact-asset association will automatically be made. This association will be used for the auto-association feature.

Auto-Associating an Item's Contact Using the Asset

When an asset is selected, the system will determine if there are any contacts associated with the asset. This is done only if a contact has not been selected from the **Contact** drop-down list. The **Contact** drop-down list will be populated with any contacts associated with the asset, and the first asset arbitrarily selected. Auto-association is attempted if an asset is selected from the **Asset** drop-down list from the **New work item page**, or in any operation that results in an asset being selected from the **Select an asset page (New asset, Recent asset and Find asset)**.

Note Auto-association only occurs when creating an item, it does not occur when a work item is being edited.

To Find an Asset

- 1 Enter a partial name or location into the **Find** text box, and then click **Find**.
- 2 When the search results appear, click the **Asset** drop-down arrow and select an asset.

Select Asset - New Work Item

To Select an Asset

- 1 Click **Work items> New work item**.
- 2 Click **Select an Asset** on the toolbar.
- 3 Click one of the following options:
 - **Keep current contact.**
 - **Remove current contact.**
 - **New asset.**
 - **Asset associated with current contact.**

The drop-down list displays the assets which have been associated with the currently selected contact.

- **Recent asset.**
- **Find asset**
 - Type search criteria in any of the text boxes, click **Find** at the bottom of the page.
 - From the drop-down list below **Find**, select an **asset** from the list of results.
- 4 Click **Properties**, to go to the **Asset page**. You can **Edit** the selected asset's information, or you can add a **New asset** altogether.

Note The **Properties** button controls whether or not the next page will be the **New work item page** or the **Asset properties page**. The only exception is when the **New asset** option is selected, in which case, both **OK** and **Properties** will take the user to the **Asset properties page**.
- 5 Click **OK**, the selected asset will be associated with the work item.

Find Work Items

Find Work Items - Simple Tab

The **Find work items page** lets you find works item by using specific search criteria. Helpdesk Solution offers a simple and advanced search.

Workers can find work items through searches and queries. If you know the work item number you can enter the item number in the either the **View item** or **Edit item** fields located below *Common tasks*, click **Enter** or click the **green arrow** next to the box.

It is possible to work on several work items at once in multiple browsers without the consoles interfering with one another. The last console that has any activity will "win" with respect to saving the user's preferences and state (for example: the list of last items worked on). Each time a console is opened, it will inherit the state of the last console that had any activity.

Work items > Find work items

Find work items

Simple | **Advanced**

Title*: Wildcard search (slow) ▾

Comment*: Wildcard search (slow) ▾

Category: --[any]-- ▾ Scope: Exact category ▾ Pattern:

Assigned: --[any]-- ▾ External ID:

Priority: --[any]-- ▾ Status: --[any]-- ▾ Type: --[any]-- ▾

Find **Reset**

#	Title	Assigned	Priority	Status	Category	Modified
1	Monitor Broken	Level 2 Deskt	Medium	Open	Break□Fix	2/13/2003 2:59:...
2	Cannot access the Internet	Level 1	Medium	Open	Not specified	2/11/2003 6:13:...
3	Driver Error	Kathi	Medium	Open	Not specified	2/13/2003 2:26:...
4	Need printer installed	Level 1	Medium	Open	Not specified	2/10/2003 2:06:...
5	Cannot access e□mail server	Level 1	Medium	Open	Not specified	2/10/2003 2:00:...
6	Monitor screen is blue	Level 1	Medium	Open	Not specified	2/10/2003 2:14:...
7	Cable to Monitor is loose.	Level 1	Medium	Open	Not specified	2/10/2003 2:47:...
8	CD□ROM drive broke	Level 2	Medium	Open	Break□Fix	2/13/2003 2:25:...
9	Test	Level 1	Medium	Open	Not specified	2/11/2003 10:33:...

Items 1 to 9 of 9 Page 1 of 1

1 Rows per page: 50 |< << >> >|

Save query

- 1 Click **Work items>Find work items** listed below *Commands*. <OR>
- 2 Click **Find work items** listed below *Common Tasks*.
- 3 Type the search criteria in one or more of the boxes, then click **Find**.

- 4 The **Items** list at the bottom of the page shows all work items the found based on the search criteria you selected. Click **View** or **Edit** next to the work item you want to view or edit.
- 5 The **Save query** link at the bottom of the page, allows you to save the search criteria of the query that produced the results on the page. The **Save query** link will be disabled while you enter a search criteria, but will enable when **Find** is clicked.

When you click **Save query**, the **New query command** will be invoked with context. The query expression will be displayed in the **Expression** text box.

- 6 Click **Reset** to clear the search fields and start another search.

Note The **Items** list in the diagram above is sorted by **number(#)** in descending order. For details see [“Sort Work Item List”](#) on page 89

Find Work Item *Simple* Field Description

Page Items

Item	Description
Title	Type the Title of the work item.
Match all words	Select the Title match criteria from the drop-down list.
Comment	Type Comment word selection.
Match all words	Select the Comment match criteria from the drop-down list.
Category	Select Category from the drop-down list.
Scope	Select option from the drop-down list.
Pattern	Type string Pattern for search.
Assigned	Select Assigned worker group from the drop-down list.
External ID	Type an External ID . An External ID is appropriate for organizations managing external customers who need to identify the external customer with a unique ID.
Priority	Select the Priority from the drop-down list.
Status	Select Status from the drop-down list.
Type	Select Type from the drop-down list.
Find	Click to begin search for work item .
Reset	Click to clear the form.
Cancel	Click to abort function.

Find Work Items - Advanced Tab

Work items > Find work items

Find work items

Simple **Advanced**

Title*: Wildcard search (slow) ▼

Comment*: Wildcard search (slow) ▼

Category: --[any]-- Scope: Exact category Pattern:

Assigned: --[any]-- External ID:

Priority: --[any]-- Status: --[any]-- Type: --[any]--

Contact: E-mail:

Asset: Asset type: --[any]--

Modified by: Created by:

Modified before after 2/20/2003 ...

Created before after 2/20/2003 ...

Start before after 2/20/2003 ...

Due before after 2/20/2003 ...

Find **Reset**

#	Title	Assigned	Priority	Status	Category	Modified
68 1	Monitor Broken	Level 2 Deskt	Medium	Open	Break □ Fix	2/13/2003 2:59:...
68 2	Cannot access the Internet	Level 1	Medium	Open	Not specified	2/11/2003 6:13:...
68 3	Driver Error	Kathi	Medium	Open	Not specified	2/13/2003 2:26:...
68 4	Need printer installed	Level 1	Medium	Open	Not specified	2/10/2003 2:06:...
68 5	Cannot access e-mail server	Level 1	Medium	Open	Not specified	2/10/2003 2:00:...
68 6	Monitor screen is blue	Level 1	Medium	Open	Not specified	2/10/2003 2:14:...

Items 1 to 9 of 9 Page 1 of 1

Rows per page: 50

[Save query](#)

- 1 Click **Work items>Find work items** listed below *Commands*. <OR>
- 2 Click **Find work items** listed below *Common Tasks*.
- 3 Click the **Advanced** Tab.
- 4 Type the search criteria in one or more of the boxes, then click **Find**.
- 5 The **Items** list at the bottom of the page shows all work items the found based on the search criteria you selected. Click **View** or **Edit** next to the work item you want to view or edit.
- 6 The **Save query** link at the bottom of the page, allows you to save the search criteria of the query that produced the results on the page. The **Save query** link will be disabled while you enter a search criteria, but will enable when **Find** is clicked.

When you click **Save query**, the **New query command** will be invoked with context. The query expression will be displayed in the **Expression** text box.
- 7 Click **Reset** to clear the search fields and start another search.

Note The Items list in the diagram above is sorted by **Priority** in ascending order. For details see “[Sort Work Item List](#)” on page 89

Find Work Item *Advanced* Field Description

In addition to the Simple search field options, the Advanced search offers the following additional search fields.

Page Items

Item	Description
Contact Name	Type the Name of the new contact.
Contact E-mail	Type the E-mail address of the new contact.
Asset	Type a description of the asset.
Asset type	Select the Asset type from the drop-down list.
Modified by	Type a worker name who modified the asset.
Created by	Type a worker name who created the asset
Modified by date range	Type the date range to search, then select either the before or after option.
Created by date range	Type the date range to search, then select either the before or after option.
Start by date range	Type the date range to search, then select either the before or after option.
Due by date range	Type the date range to search, then select either the before or after option.
Find	Click to begin search.
Reset	Click to clear form.

Search in Comment or Title Field

You can search within the comment field of a work item. Unlike searching in other fields, which search only the current state of the work item, searching in comments- works against the current state of the work item as well as historical work item data. This is very beneficial as workers search work items for helpful solutions to similar problems.

Full-text searching using FREETEXT and CONTAINS (Transact SQL) syntax is supported, but may require configuration. Full-text searching provides very powerful searching within the comment field.

If MS SQL 7 or 2000 has not been configured for full-text searching, searches can still be done using Transact SQL wildcard character searches (see “Wildcard Searches” below). These searches are more limited than full-text and can be less efficient than full-text searching, especially as your database grows larger.

Full-text (FREETEXT and CONTAINS) Searches

Note Full-text searching is only supported with MS SQL 7/2000, not MSDE.

During initial configuration, full-text search configuration is attempted. In order to do this, the Full-Text Search service, MSSearch, must be installed using an advanced options available during the MS SQL installation. Additionally, this service can be activated post install. If successful, a full-text index is created on the comment column of the workitem table, and a new catalog, HD_workitem_comment, is created to store the full-text index.

When full-text searches have been correctly configured, a message is displayed beneath the comment field that indicates that FREETEXT and CONTAINS syntax may be used. Additionally, the message contains the date and time that the index in the catalog HD_workitem_comment was last updated. Comment data modified after this date will not be found using a full-text search until the catalog has been updated (repopulated). If full-text search has not been correctly configured, a

warning message, with a yellow background is displayed beneath the comment field that indicates that full-text search is not enabled. When full-text search is not enabled, FREETEXT and CONTAINS syntax may not be used.

Manual Configuration

If the Full-Text Search service, MSSearch, is not installed, full-text searches cannot be configured and full-text searches will need to be configured manually. MSDN has a good article on implementing full-text searches at <http://msdn.microsoft.com/library/periodic/period01/ntp0111.htm>. This article includes information on installing the MSSearch service, creating a full-text index and catalog, populating the full-text catalog, and scheduling catalog updates.

Syntax

When full-text search service is enabled, it recognizes whether the search being performed is a FREETEXT or CONTAINS search.

IMPORTANT Do not include the FREETEXT or CONTAINS predicate in the search field, this will be done for you.

FREETEXT is less precise than CONTAINS and matches values on meaning, not the exact word. The following MSDN article discusses FREETEXT in detail: http://msdn.microsoft.com/library/psdk/sql/ts_fa-fz_2juc.htm.

CONTAINS is more precise than FREETEXT and recognizes special syntax such as *and*, *or*, *and not*, *FORMSOF*, *NEAR*, etc. The following MSDN article discusses CONTAINS in detail: http://msdn.microsoft.com/library/psdk/sql/ts_ca-co_2y2h.htm.

If full-text searching is enabled, the user can override FREETEXT or CONTAINS searches by checking **Disable full-text searching** in the **Find** feature. This lets the user perform wildcard searches as discussed in “Wildcard Searches” below.

Wildcard Searches

Wildcard searches are not nearly as powerful as FREETEXT and CONTAIN searches. If full-text searches have been configured, the user is limited to this type of search. Any valid Transact SQL wildcard character can be used (e.g. %, _, [] (^)). The following MSDN article discusses wildcard searches: http://msdn.microsoft.com/library/default.asp?URL=/library/psdk/sql/ts_tsqcon_6lyk.htm

IMPORTANT Do not include the LIKE predicate in the search field, this will be done for you.

Using Queries

The **Queries** option lets workers access work item data by running a query, creating a new query or deleting an existing query they previously created.

Queries provide workers a flexible way to access work item data. A number of useful queries are included as shared queries, or queries common to all workers.

The query system includes a parameter replacement system so that input can be solicited whenever the query is run. Note that the query system only works against the most recent version of all work items; however, any valid Tansact-SQL WHERE clause (minus the word “WHERE”) can be entered as the expression to be evaluated.

See Also

[List Query](#) (page 71)

[New Query](#) (page 71)

[Modify New Query Search](#) (page 72)

[Query Data Types](#) (page 73)

[Query Parameter Replacement](#) (page 76)

[Delete Queries](#) (page 78)

[Last Query Results](#) (page 79)

List Query

The List query page displays a list of pre-defined queries to help you manage your work items. You can select a query to modify or create a new query based on a query already listed.

Name	Shared
> All open items	Yes
> All priority items	Yes
> Items by worker	Yes
> Open Level 1 items	Yes
> Open Level 2 items	Yes
> My open items	Yes
> My overdue items	Yes
> My planned items	Yes
> My priority items	Yes
> My resolved items	Yes

To List Queries

- 1 Click **Work items > Queries > List queries**.
- 2 Click **Run** or **View** next to the query you want to run or view.
- 3 Click **New** to add a new query
- 4 Click **Edit** to modify a query you created.
- 5 Click **Delete** to remove a query you created from the Helpdesk system.

List Query Page Field Description

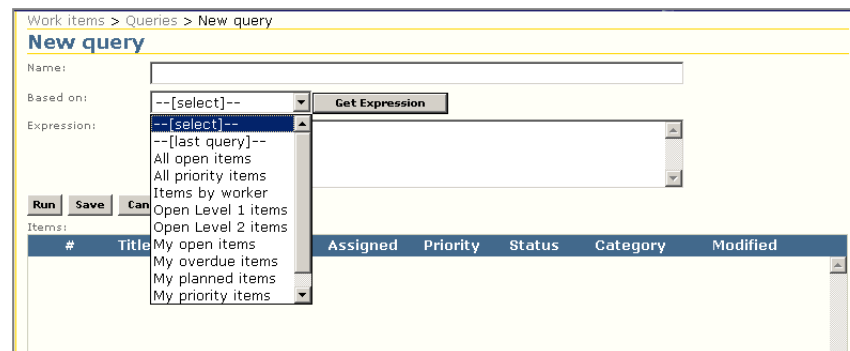
Page Items

Item	Description
All open items	List of all open items.
All priority items	List of all priority items.
Items by worker	List of items assigned to a specific worker.
Open Level 1 items	List of all Open Level 1 items.
Open Level 2 items	List of all Open Level 2 items.
My open items	List of open items specific to the worker requesting the query search.
My overdue items	List of overdue items specific to the worker requesting the query search.
My planned items	List of planned items specific to the worker requesting the query search.
My priority items	List of priority items specific to the worker requesting the query search.

New Query

The **New query page** allows you to select a pre-defined query from the drop-down list and edit the query string to produce the results you want.

The query editor will now allow the worker to build an expression based upon the **Last query**. The option "--[last query]--" is one of the options in the **Based on** drop-down list, which allows the worker to "get" the query expression from the last query performed. If a last query has not been established for the current session, then an appropriate message will be displayed.

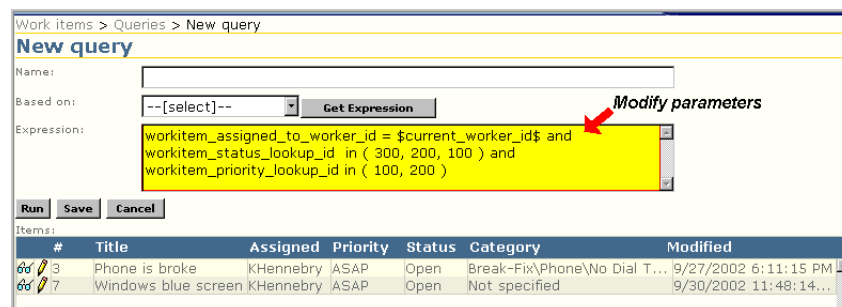


To Create a New Query

- 1 Click **Work items > Queries > New query**.
- 2 Select a query option from the **Based on** drop-down list, then click **Get Expression**. The **Name** field will populate the associated name of the query.
- 3 Click **Run**. The results will display in the **Items** list at the bottom of the page.
- 4 If you would like to save this query, you must give the query a name in the **Name** box.
- 5 Click **Save**.
- 6 Workers may view the **Last query results** run by selecting the option **Work items>Last query results** listed below *Commands* or **Last query results** listed below *Common tasks*.

If the worker saved the query to a new name, the query will appear in the **Based on**: drop-down list as well as in the **List query page** once the browser is refreshed.

Modify New Query Search



Helpdesk Solution has a parameter replacement system so that input can be solicited whenever the query is run.

Note that the query system only works against the most recent version of all work items - workers cannot query against work item history directly unless they type in valid Transact-SQL sub-select statements that query against the workitem_detail_view view.

To Modify a Query Search

- 1 Click **Work items > Queries > New query**.
- 2 Usually, it is easiest to modify the codes of an existing query. Select an existing query from the **Based on** drop-down list.
- 3 Click **Get Expression**.

- 4 Modify the parameters of the query.
- 5 Click **Run**.
- 6 If you would like to save this query, you must give the query a name in the **Name** box.
- 7 Click **Save**.
- 8 Once the browser page is refreshed, the new query will appear in the **Based on** drop-down list as well as in the **List query page**.

New Query Page Field Description.

Page Items

Item	Description
Name	Type a Name for the new query search.
Based on:	Select a default query from the drop-down list.
Get Expression	Click the Get Expression to display the query parameters in the Expression box.
Expression	Modify the text of the query parameters.
Run	Click to perform the search.
Save	Click to save the New query search criteria.
Cancel	Click to abort function.
Items:	Displays the query search results.

Query Data Types

When creating queries the worker must be aware of the data types of the fields that are used in the query so that single quotes can be added or omitted appropriately. There are three basic data types for these fields: unit, string, and datetime. If the data type of the field is string or datetime the argument must be quoted.

String Examples

```
workitem_external_reference like 'SMS%' (wild card character for partial string matching)
assigned_to_worker_name = 'mdavis'
```

Datetime Examples

```
workitem_modified_on > '12/11/00 10:10:00 AM'
workitem_modified_on > '12/11/00 10:05:00' (interpreted as 24 hour clock)
workitem_modified_on > '12/08/00 15:00:00'(interpreted as 24 hour clock)
workitem_modified_on > '12/11/00' (interpreted as midnight between 10th and 11th)
workitem_modified_on > 'Dec 09, 2000 10:00:00 AM'
workitem_modified_on > '20001209'
```

Unit Examples

```
workitem_number > 150
workitem_minutes_spent > 3
workitem_status_lookup_id = 100
```

The table below lists the field names that can be queried against, their type, and additional information where appropriate.

Field Name	Type	Acceptable values (and comments)
workitem_link_parent_number	uint	
workitem_number	uint	
workitem_is_last	string	1, 0
workitem_has_attachments	string	1, 0
workitem_version	uint	
workitem_external_reference	string	
workitem_priority_lookup_id	uint	
workitem_status_lookup_id	uint	
workitem_category_lookup_id	uint	
workitem_type_lookup_id	uint	
workitem_link_type_lookup_id	uint	
workitem_assigned_to_worker_id	uint	
workitem_created_on	datetime	
workitem_created_by_worker_id	uint	
workitem_start_on	datetime	(only date part is in db; e.g. 11/10/00)
workitem_due_on	datetime	(only date part is in db; e.g. 11/10/00)
workitem_modified_on	datetime	
workitem_modified_by_worker_id	uint	
workitem_minutes_spent	uint	
workitem_action	string	Create, Open, Assign, Attach, Link, Edit, Associate contact, Associate object, Resolve (values that are provided, however this field is customizable)
workitem_title	string	
workitem_managed_object_id	uint	
workitem_contact_id	uint	
workitem_tag_collection_id	uint	
workitem_is_scheduled	string	1, 0
assigned_to_worker_name	string	
assigned_to_worker_status	string	a, i, v (a=active, i=inactive, v=virtual; inactive workers can be inactive virtual workgroups or inactive real workers)
assigned_to_worker_email	string	
assigned_to_worker_phone	string	
assigned_to_worker_cell_phone	string	
assigned_to_worker_pager	string	

Field Name	Type	Acceptable values (and comments)
assigned_to_worker_location	string	
created_by_worker_name	string	
created_by_worker_status	string	a, i, v (a=active, i=inactive, v=virtual; inactive workers can be inactive virtual workgroups or inactive real workers)
created_by_worker_email	string	
created_by_worker_phone	string	
created_by_worker_cell_phone	string	
created_by_worker_pager	string	
created_by_worker_location	string	
modified_by_worker_name	string	
modified_by_worker_status	string	a, i, v (a=active, i=inactive, v=virtual; inactive workers can be inactive virtual workgroups or inactive real workers)
modified_by_worker_email	string	
modified_by_worker_phone	string	
modified_by_worker_cell_phone	string	
modified_by_worker_pager	string	
modified_by_worker_location	string	
workitem_priority_lookup_value	string	
workitem_priority_lookup_ordinal	uint	
workitem_status_lookup_value	string	
workitem_status_lookup_ordinal	uint	
workitem_category_lookup_value	string	
workitem_category_lookup_ordinal	uint	
workitem_type_lookup_value	string	
workitem_type_lookup_ordinal	uint	
workitem_link_type_lookup_value	string	
workitem_link_type_lookup_ordinal	uint	
contact_name	string	
contact_email	string	
contact_phone	string	
contact_organization_name	string	
managed_object_name	string	
managed_object_type_lookup_id	uint	
managed_object_type_lookup_value	string	
managed_object_type_lookup_ordinal	uint	
workitem_comment	string	

Query Parameter Replacement

There are a number of special parameters that the query system recognizes. When a query is run the parameters are resolved and the results are returned. With the exception of `$current_worker_id`, all queries containing parameters will present an intermediate page where the worker can provide input.

`$current_worker_id`

The parameter `$current_worker_id` will automatically be resolved to the ID of the credential worker. The resolved parameter will not be quoted.

Example [My open items]:

```
workitem_assigned_to_worker_id = $current_worker_id and workitem_status_lookup_id = 300
```

example - work items that the current worker created:

```
workitem_created_by_worker_id = $current_worker_id
```

`$prompt_number("<prompt>")`

The parameter `$prompt_number("<Prompt>")` will produce an edit control labeled with `<prompt>` on an intermediate page where the worker can provide numeric data. The resolved parameter will not be quoted.

Example `$prompt_number("<prompt>")`:

```
workitem_number >= $prompt_number("Enter work item number lower boundary")
```

`$prompt_string("<prompt>")`

The parameter `$prompt_string("<Prompt>")` will produce an edit control labeled with `<prompt>` on an intermediate page where the worker can provide string data. The resolved parameter will be quoted.

Example `$prompt_string("<prompt>")`:

```
assigned_to_worker_name >= $prompt_string("Enter a worker name")
```

`$prompt_lookup("<prompt>", "<lookup query name>")`

The parameter `$prompt_lookup("<prompt>", "<lookup query name>")` will produce a drop-down on an intermediate page where the worker can select a value from the drop-down. The resolved parameter will be the ID of the selected value and will not be quoted. The second parameter must be the name of an existing lookup query. Lookups are customizable. As long as a query is created for the lookup, and the lookup table follows the format of existing lookup tables the lookup prompt parameter will produce a drop-down.

Example `$prompt_lookup("<prompt>", "<lookup query name>")`:

workitem_status_lookup_id=\$prompt_lookup("Select work item status:", "StatusList")\$

The following lookup queries are available:

- PriorityList
- StatusList
- TypeList

\$prompt_datetime("<prompt>")\$

The parameter \$prompt_datetime("<Prompt>")\$ will produce a datetime control labeled with <prompt> on an intermediate page where the worker can provide datetime data. The control will be initialized with the current date and time. The resolved parameter will be quoted.

Example: \$prompt_datetime("<prompt>")\$:

workitem_modified_on > \$prompt_datetime("Work items modified after:")\$

\$prompt_date("<prompt>")\$

The parameter \$prompt_date("<Prompt>")\$ will produce a datetime control labeled with <prompt> on an intermediate page where the worker can provide date data. The control will be initialized with the current date. This parameter is particularly useful when querying against workitem_start_on and workitem_due_on fields because only the date portion of those fields are stored in the db. The resolved parameter will be quoted.

Example \$prompt_date("<prompt>")\$:

```
workitem_start_on >= $prompt_date("Work items that will start on or after:")$
```

Delete Queries

The **Delete query page** allows workers to delete queries they have added or modified to the system. They cannot delete the default (shared) queries that come with Helpdesk Solution.

Name	Shared
<input type="checkbox"/> New Query Added to System	No

- 1 Click **Work items>Queries>Delete queries**.
- 2 Select the check box next to the query **Name** you want to delete.
- 3 Click **Next** to continue.
- 4 The queries you selected will appear.

Title	Modified by	Modified on	Visible to guests	Status
Phone dial out issue	KHennebry	9/17/2002 2:41:33 PM	No	Active

A prompt will display the following message:

Are you sure you want to delete the following items?

- 5 Click **Back** to change the selected queries to delete.
- 6 Click **Finish** to delete selected queries.

Last Query Results

This option will display the results from the last query run by the worker currently logged into the **Helpdesk Worker console**.

Work items > Last query results

Last query results

Description: All open items
 Expression: workitem_status_lookup_id = 300
 Last run: 2/17/2003 7:34:24 PM

[Refresh](#)

#	Title	Assigned	Priority	Status	Category	Modified
2	Cannot access the Internet	Level 1	Medium	Open	Not specified	2/11/2003 6:13:38
9	Test	Level 1	Medium	Open	Not specified	2/11/2003 10:33:38
3	Driver Error	Kathi	Medium	Open	Not specified	2/13/2003 2:26:38
1	Monitor Broken	Level 2 Desk	Medium	Open	Break □ Fix	2/13/2003 2:59:38
5	Cannot access e□mail server	Level 1	Medium	Open	Not specified	2/10/2003 2:00:38
4	Need printer installed	Level 1	Medium	Open	Not specified	2/10/2003 2:06:38
8	CD □ ROM drive broke	Level 2	Medium	Open	Break □ Fix	2/13/2003 2:25:38
6	Monitor screen is blue	Level 1	Medium	Open	Not specified	2/10/2003 2:14:38
7	Cable to Monitor is loose.	Level 1	Medium	Open	Not specified	2/10/2003 2:47:38

Items 1 to 9 of 9 Page 1 of 1

Rows per page: 50

[Save query](#)

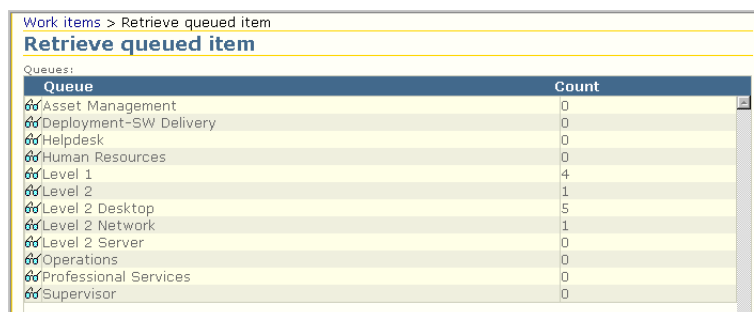
- 1 Click the **Work items>Last query results** listed below *Commands*. <OR>
- 2 Click **Last query results** listed below *Common tasks*.
- 3 Click **Refresh** to re-run the query, the **Items** list will update the results.
- 4 The **Save query** link at the bottom of the page, allows you to save the last query. The **Save query** link will be disabled unless a Last query has been established in the current session.

When you click **Save query**, the **New query command** will be invoked with context. The last query expression will be displayed in the **Expression** text box.

- 5 Click **View** or **Edit** next to the work item to view or edit the record.

Retrieve Queued Item

The **Retrieve** function allows workers to retrieve the next available work item in a specified queue. Workers retrieve from their assigned queue or are prompted to select a queue as shown below. Work items in the queue display by order of their create date and time, displaying oldest to most recent. Administrators determine which queue a worker can retrieve from through the **Helpdesk Admin console**. For more details see “[List Workers](#)” on page 135.



Work items > Retrieve queued item

Retrieve queued item

Queues:

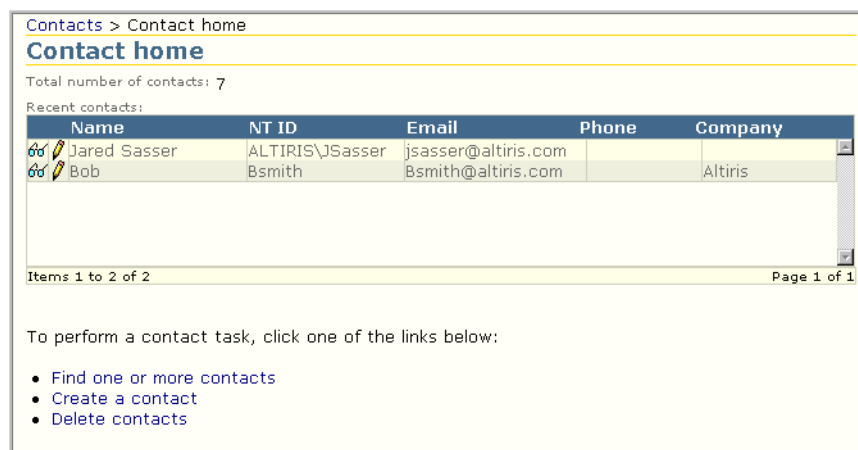
Queue	Count
Asset Management	0
Deployment-SW Delivery	0
Helpdesk	0
Human Resources	0
Level 1	4
Level 2	1
Level 2 Desktop	5
Level 2 Network	1
Level 2 Server	0
Operations	0
Professional Services	0
Supervisor	0

- 1 Click **Work items>Retrieve queued item** listed below *Commands* <OR>
- 2 Click **Retrieve queued item** listed below *Common Tasks*.
- 3 Click **View** next to the queue item name to display the next available work item.

Contacts

Contacts Home

The **Contacts home page** displays a list of the contact records last accessed by the worker. Workers can also link to the **Find contacts**, **New contacts** and **Delete contacts** pages.



Contacts > Contact home

Contact home

Total number of contacts: 7

Recent contacts:

Name	NT ID	Email	Phone	Company
Jared Sasser	ALTIRIS\JSasser	jsasser@altiris.com		
Bob	Bsmith	Bsmith@altiris.com		Altiris

Items 1 to 2 of 2 Page 1 of 1

To perform a contact task, click one of the links below:

- [Find one or more contacts](#)
- [Create a contact](#)
- [Delete contacts](#)

- 1 Click **Contacts > Contacts home**.
 - 2 Select one of the following options:
 - Find one or more contacts
 - Create a contact
 - Delete contacts
- Note** A list of most **Recent contacts** will display on the **Contacts home page**.

View Contacts

View contact

View contact - Jared Sasser

Contact properties:

Name: Jared Sasser E-mail: jsasser@altiris.com NT ID: ALTIRIS\jsasser

Title: Employee ID:

Phone: Cell phone: Pager:

Pager e-mail: VIP: No Status: Active

Password:

Company information:

Location: Company: Department:

Organization:

Comments:

Assets:

Name	Type	External Id	Serial #	Asset tag
PC	Computer		1234	
Monitor	Computer			

Items 1 to 2 of 2 Page 1 of 1

Items:

#	Title	Assigned	Priority	Status	Category	Modified
11	Hard drive	Level 1	Medium	Open	Not specified	9/30/2002 11:43:29 AM
12	Cannot find my ...	Level 1	Medium	Open	Not specified	9/30/2002 11:46:34 AM
7	Windows blue s...	KHennebry	ASAP	Open	Not specified	9/30/2002 11:48:14 AM
17	testing open	Level 1	Medium	Reques...	Not specified	10/2/2002 12:37:35 PM

Items 1 to 4 of 4 Page 1 of 1

To View a Contact

- 1 Click **Edit** to modify the contact information.
- 2 Click **View** or **Edit** next to the item from the **Assets** or **Items** list, if any, to view or edit assets or items information.

Find Contacts

The **Find contacts** page lets you find an existing contact already entered into the Helpdesk database.

Contacts > Find contacts

Find contacts

Name: NT ID: E-mail:

Phone: Company: Department:

Organization: --[any]-- Title: Employee ID:

Status: --[any]-- VIP: --[any]--

Find

Contacts:

Name	NT ID	Email	Phone	Company
Bob	Bsmith	Bsmith@altiris.com		Altiris
Byron Uhrhan	Altiris\buhrhan	buhrhan@altiris.com		Altiris
Ed Galbraith	altiris\egalbraith2	egalbraith@altiris.com	801.805...	Altiris
Jared Sasser	ALTIRIS\JSasser	jsasser@altiris.com		
Kathi Hennebry	ALTIRIS\khennebry	khennebry@altiris.com	805-1161	
Michael Ashton	Altiris\mashton	mashton@altiris.com		
Rick Gines	Altiris\rgines	rgines@altiris.com	801-555...	

To Find a Contact

- 1 Click **Contacts > Find contacts**.
- 1 Type the search criteria in the form on the page.
- 2 Click **Find**.

The results from the **Find** are displayed in the **Contacts** list at the bottom of the page.

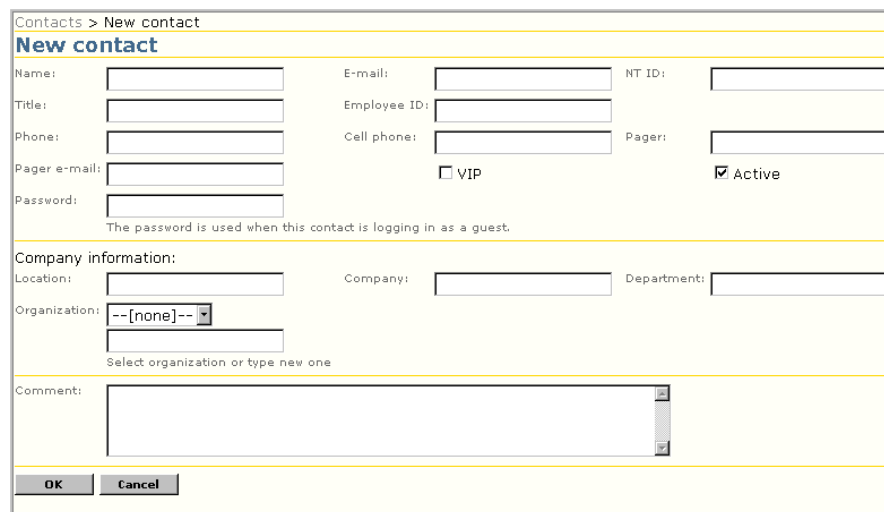
Find Contacts Page Field Description

Page Items

Item	Description
Name	Type the Name of the new contact.
NT ID	Type the NT ID of the new contact.
E-mail	Type the E-mail address of the new contact.
Phone	Type the Phone Number of the new contact.
Company	Type the Company name of the new contact.
Department	Type the Department name of the new contact.
Organization	Type the Organization the new contact is associated with.
Title	Type the job Title of the new contact.
Employee ID.	Type the Employee ID of the new contact.
Status	Select the check box to indicate Active or Inactive .
VIP	Select the check box to indicate VIP status.
Find	Click Find to perform search.
New	Click to add New contact information.
Delete	Click to Find a contact to delete from the database.

New Contact

Contacts are the users who request help from Helpdesk workers. Although contacts can be added to the system from this page and when work items are created, it is more efficient to import contact data from Notification Server sources. Helpdesk workers are also contacts.



To Add a Contact

- 1 Click **Contacts>New contact**.
- 2 Type the contact information in the form on the page.
- 3 Click **OK** to save.

New Contact Page Field Description

Page Items

Item	Description
Name	Type the Name of the new contact.
NT ID	Type the NT ID of the new contact.
E-mail	Type the E-mail address of the new contact.
Pager e-mail	Type the Pager e-mail address of the new contact.
Phone	Type the Phone Number of the new contact.
Cell Phone	Type the Cell Phone number of the new contact.
Pager	Type the Pager number of the new contact.
Location	Type the Location where the new contact resides.
Company	Type the Company name of the new contact.
Department	Type the Department name of the new contact.
Organization	Type the Organization the new contact is associated with.
Title	Type the job Title of the new contact.
Employee ID.	Type the Employee ID of the new contact.
VIP	Select the check box to indicate VIP status.
Active	Select the check box to indicate Active status.
Password	This password will be used to authenticate contacts trying to access Helpdesk via the User console (or any entry point with the credential workerMode="user"). This is not the contact's NT password. This password is stored in clear text in the database. Other workers can view and edit these passwords
Comments	This is a general purpose property of a contact, but can be used to specify a question/answer pair known only by the contact in the event that they have forgotten their password.
OK	Click to save changes.
Cancel	Click to abort function

Assets

Assets Home

The **Assets home page** displays a list of the assets recently viewed or edited by the current worker. Workers can also link to the **Find assets**, **New assets** and **Delete assets** pages.

Assets > Asset home

Asset home

Total number of assets: 4

Recent assets:

Name	Type	External Id	Serial #	Asset tag
DVD Player	Computer			
Network Hub	Network port			
Monitor	Computer			

Items 1 to 3 of 3 Page 1 of 1

To perform an asset task, click one of the links below:

- [Find one or more assets](#)
- [Create an asset](#)
- [Delete assets](#)

To Use the Assets Home Page

- 1 Click **Assets>Assets home**.
- 2 Select one of the following options:
 - Find one or more assets
 - Create a asset
 - Delete assets

Note A list of most **Recent assets** will display on the **Assets home page**.

View Assets

View asset

View asset - Monitor

Asset properties:

Name:	Monitor	Type:	Computer	External ID:	
Location:	Lindon Office	Manufacturer:	NEC	Model:	AccuSync 70
Serial #:		Asset tag:		IP address:	
OS:		Organization:		Status:	Active
Comments:	Add comments here				
Sources:	Asset was not imported				

Contacts:

Name	NT ID	Email	Phone	Company
Jared Sasser	ALTIRIS\jsasser	jsass...		

Items 1 to 1 of 1 Page 1 of 1

Items:

#	Title	Assigned	Priority	Status	Category	Modified
12	Cannot find ...	Level 1	Medium	Open	Not specified	9/30/2002 11:46:34 ...

Items 1 to 1 of 1 Page 1 of 1

To View Assets

- 1 Click **Edit** to modify the asset information.
- 2 Click **View** or **Edit** next to the item from the **Contacts** or **Items** list, if any, to view or edit contacts or items information.

Find Assets

The **Find Assets** page lets you find assets within the Helpdesk database system.

Assets > Find assets

Find assets

Name: Type: External ID:

Location: Manufacturer: Model:

Serial #: Asset tag: IP address:

Status: Organization:

Find

Assets					
	Name	Type	External Id	Serial #	Asset tag
	DVD Player	Computer			
	Monitor	Computer			
	Network Hub	Network port			
	PC	Computer		1234	

To Find an Asset

- 1 Click **Assets > Find assets**.
- 1 Type the search criteria in the form on the page.
- 2 Click **Find**.

Note The results from the **Find** are displayed in the **Assets** list at the bottom of the page.

New Asset

This feature allows workers to add **New assets** to the Helpdesk systems database. Assets are any type of item you want to track within an organization, such as: PCs, monitors, printers, software products and more.

Assets > New asset

New asset

Name: Type: External ID:

Location: Manufacturer: Model:

Serial #: Asset tag: IP address:

OS: Organization: Active

Select organization or type new one

Comment:

OK **Cancel**

To Add a New Asset

- 1 Click **Assets > New asset**.
- 2 Type the asset information in the form on the page.
- 3 Click **OK** to save.

New Asset Page Field Description

Page Items

Item	Description
Name	Type a short description of the asset.
Type	Select a Category from the drop-down list.
External ID	Type an External ID . An External ID is appropriate for organizations managing external customers who need to identify the external customer with a unique ID.
Location	Type the physical Location of the asset.
Manufacturer	Type the Manufacturer of the asset.
Model	Type the Model type of the asset.
Serial #	Type the Serial # of the asset.
Asset tag	Type the number of the asset tag.
IP address	Type the IP address of the asset.
OS	Type the operating system the asset is currently using.
Organization	Select Organization from the drop-down list or enter a new one in the box.
Comment	Enter a text comment description of the new asset.
Status	Check the box to indicate Active or Inactive .
OK	Click to save changes.
Cancel	Click to abort function

Recents

The **Recents** page allows workers to access the most recent entries of **Work items**, **Contacts** and **Assets**.

Recents						
Items:						
#	Title	Assigned	Priority	Status	Category	Modified
2	Email doesn't work	KHennebry	Medium	Open	Not specified	9/30/2002 2:16:2...
12	Cannot find my program	Level 1	Medium	Open	Not specified	9/30/2002 11:46:...
11	Hard drive	Level 1	Medium	Open	Not specified	9/30/2002 11:43:...
7	Windows blue screen	KHennebry	ASAP	Open	Not specified	9/30/2002 11:48:...
3	Phone is broke	KHennebry	ASAP	Open	Break-Fix\Phone\No Dial Tone	9/27/2002 6:11:1...

Items 1 to 5 of 5 Page 1 of 1

Contacts:					
Name	NT ID	Email	Phone	Company	
Jared Sasser	ALTIRIS\JSasser	jsasser@altiris.com			
Bob	Bsmith	Bsmith@altiris.com		Altiris	

Items 1 to 2 of 2 Page 1 of 1

Assets:				
Name	Type	External Id	Serial #	Asset tag
DVD Player	Computer			
Network Hub	Network port			
Monitor	Computer			

Items 1 to 3 of 3 Page 1 of 1

To Use the Recents Page

- 1 Click **Recents** on the left-hand menu, the above page appears <OR>.
- 2 Click **Recents**, then select an item from the pop-out menu.
- 3 Click **View** or **Edit** next to the item you want to view or edit.

My Helpdesk Console

My Helpdesk is intended for users with an NT ID in an organizational internet environment. Users who logon to an intranet using NT authentication, then login to **My Helpdesk console**, automatically have their contact information attached to the work item they create. Through this console, users can create their own work items, view or partially edit previously added work items, and update their own contact information. Additionally, bulletins posted by Workers or Administrators that are designated for all users, can be viewed on the bottom of the **My Helpdesk Console page**.



Helpdesk altiris eXpress

My Helpdesk console

ALTIRIS\khennebry

Name: Kathi Hennebry
 Title:
 E-mail: khennebry@altiris.com
 Phone: 805-1161
 Cell phone:
 Department:

#	Assigned	Priority	Status	Category	Modified
13	.. Level 2 Desktop	High	Requested Break-Fix	\Desktop\Monitor	9/30/2002 10:32:48 AM
14	.. Level 2 Desktop	ASAP	Requested How to	\Access Email	9/30/2002 10:33:51 AM

Items 1 to 2 of 2 Page 1 of 1

Bulletins:

9/17/2002 2:41:33 PM - KHennebry
Phone dial out issue
 All company phone lines will not dial out long distance, the carrier has been notified. No ETA for resolution at this time.

9/12/2002 9:18:43 AM - JSasser
3rd floor printer
 IT knows about the printer problem

9/6/2002 10:44:23 AM -
Welcome
 Welcome to Altiris eXpress!

To Use My Helpdesk Console

- 1 Open **My Helpdesk console** by entering either the complete URL <http://<server name>/aexhd/winuser/Default.aspx> or by entering a shortcut (URL alias) if created. <OR>
- 2 Enter through the main entry point **Altiris eXpress Helpdesk consoles** - <http://<server name>/aexhd/>.

The options on the **My Helpdesk console page** is as follows:

- Click **View** next to the work item. The work item list only appears if you have previously added new work items.
- Click **Edit** next to the work item. The work item list only appears if you have previously added new work items.
- Click **New** to add a new work item.
- Click **Edit my info** to update your contact information.
- Click **LogOff** to exit **My Helpdesk console**.

My Helpdesk toolbar description



My Helpdesk - New Work Item

The screenshot shows the 'My Helpdesk Console' interface. At the top, there is a blue header with the 'altiris eXpress' logo. Below the header, the page title is 'My Helpdesk Console'. The form contains the following fields:

- Name: Kathi
- E-mail: khennebry@altiris.com
- Phone: (empty)
- Title: (empty text box)
- Category: How to (dropdown menu)
- Priority: Medium (dropdown menu)
- Asset: --[none]-- (dropdown menu)
- Attachments: (empty area with a paperclip icon)
- Comment: (empty text box)

At the bottom of the form, there are two buttons: 'OK' and 'Cancel'.

To Add a New Work Item

- 1 Type the required information in the form on the page.
For more details see [“New Work Item”](#) on page 50 and [“Attachments”](#) on page 55.
- 2 Click **OK** to save.

Sort Work Item List

The **My Helpdesk Console page** will display a list of the work items created by the current user, located at the bottom of the page. The **Work item list** can be sorted as needed by selecting the sort topic:

- #
- Title
- Assigned
- Priority
- Status
- Category

The sort topics toggle between ascending and descending sort order then they are selected.

For example Click #, an arrow appears next to the sort topic #. The up arrow indicates the sort order is ascending to descending. Click # again, a down arrow appears to indicate the sort order is descending to ascending.

The screenshot shows the 'My Helpdesk console' page for user 'ALTIRIS\khennebry'. The user's details are: Name: Kathi Hennebry, Title: (blank), E-mail: khennebry@altiris.com, Phone: 805-1161, Cell phone: (blank), Department: (blank). Below this is a table of assigned tickets:

#	T Assigned	Priority	Status	Category	Modified
13	...Level 2 Desktop	High	Requested	Break-Fix\Desktop\Monitor	9/30/2002 10:32:48 AM
14	...Level 2 Desktop	ASAP	Requested	How to\Access Email	9/30/2002 10:33:51 AM

Edit My Info

Users can update their user information once the account is added to the system. The following information can be changed:

- Name
- Title
- E-mail
- Phone
- Cell phone
- Department
- Password - see note.

Note This is your Helpdesk password for the **User console**, not the user's NT password.

The 'Edit My Info' form contains the following fields and values:

- Name: Kathi
- Title: IT Support
- E-mail: khennebry@altiris.com
- Phone: 801-226-8500
- Cell phone: (blank)
- Department: Support
- Password: (blank)

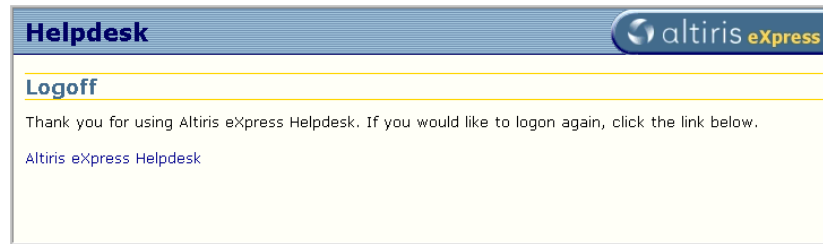
Buttons: OK, Cancel

To Edit My Info

- 1 Click **Edit my info** on the **My Helpdesk Console** page.
- 2 Type the required information in the form.
- 3 Click **OK** to save.

Logoff

When you have completed all tasks within the **My Helpdesk console**, be sure to **Logoff** and close the web browser to completely log out of the Helpdesk system. Logging off also conserves system resources.



To Logoff My Helpdesk

- 1 Click **Logoff** to log off the **My Helpdesk Console** page.
- 2 Close the web browser.

Work Item Request - NT User

The **NT User console** is intended for users with a NT ID authentication through their own internet environment and only want to log a work item. This console is similar to **My Helpdesk console** but only has the functionality to add a work item. Work items created in this console have their status set to **Requested**.

- 1 Open **My Helpdesk Console** by entering either the complete URL <http://<server name>/aexhd/winuser/Default.aspx> or by entering a shortcut (URL alias) if created. <OR>
- 2 Enter through the main entry point **Altiris eXpress Helpdesk consoles**: <http://<server name>/aexhd/>.
- 3 Type the required information in the form on the page.
- 4 Click **OK** to save.

Work Item Request - User

The **Work item request - User** allows a user to access the Helpdesk system from the internet, meaning they do not use NT authentication at log on. Instead, users supply their e-mail address and an optional password. If the e-mail address is associated with a contact in the Helpdesk database and the password matches they are allowed to access the console. When a user adds a work item to the system, it is automatically routed to a queue where workers can retrieve the requests.

- 1 Type your e-mail address in the **E-mail** box.
- 2 Type your password in the **Password** box.
- 3 Click **OK** to logon to the **User console**.
- 4 If your logon is not in the Helpdesk database, access will be denied. You can create a user account for this entry point console by doing the following:
 - Type your e-mail address in the **E-mail** box.
 - Click, “**click here to create a new account**”.
 - Type the required information in the form on the page.
 - Click **OK** to save.

Work Item Request - Guest

The **Work item request - Guest** allows a user to access the Helpdesk system from the internet anonymously, meaning they do not use NT authentication at log on nor do you need to have an e-mail address. When a user adds a work item to the system, it is automatically routed to a queue where workers can retrieve the requests.

- 1 Open **Work item request- Guest console** by entering either the complete URL <http://<server name>/aexhd/guest/Default.aspx> or by entering a shortcut (URL alias) if created. <OR>
- 2 Enter through the main entry point **Altiris eXpress Helpdesk consoles** - <http://<server name>/aexhd/>.

- 3 Type the required information in the form on the page.
- 4 Click **OK** to save.

Work Item History

When a work item is created, a record of each action taken against the work item is recorded in the work item history. It is not possible to remove information from the work item history.

Each history record includes the date and time used for historical reporting to determine:

- When the work item request was first processed

Create Custom URL to Access Helpdesk Consoles

You can give workers a custom URL so they can load a console more quickly.

To create a custom URL

- 1 Make sure that the DNS server is set up on the server that Helpdesk Solution is on. The server that Helpdesk Solution is on must have a static IP address.
- 2 Add an alias (custom URL) into the DNS server and point it to the same URL as the server that Helpdesk Solution is on.
- 3 Put a redirection script in your `default.asp` page.

For example:

```
<html>
<head>
<title></title>
<meta http-equiv="refresh" content="0; url=http://servername/webname/
user/default.aspx
</head>
</html>
```

substituting *servername* and *webname* with the appropriate values.

- 4 Now you can type the alias name to access the Helpdesk Solution console.

Example:

Suppose you work for a company named “acme” and have a server called “brutus”. The URL to access this server is “brutus.acme.com”. This server has an IP address of 172.16.10.400. When you type in “brutus.acme.com”, the request goes to the DNS server, and the server sees that the URL should point to 172.16.10.400.

Suppose you want to add the alias “helpdesk.acme.com”. You would add “helpdesk.acme.com” into the DNS server and point it to the same URL as “brutus.acme.com”. Now, when you type either “helpdesk.acme.com” or “brutus.acme.com”, the DNS server sees that both requests go to 172.16.10.400.

Next, you add a redirection script in the `default.aspx` page that points to the Helpdesk Solution console you want to access. Now, when you type in “helpdesk” as the URL, the DNS sends the request to the computer with the IP of 172.16.10.400, which is the server “brutus”, then “brutus” delivers the default page and the page redirects to the Helpdesk Solution console.

Note Internally, to access either “brutus.acme.com”, or “helpdesk.acme.com”, you only need to type in “brutus”, or “helpdesk” respectively. Also, the alias you choose must **not** be ambiguous, it cannot exist as an alias or as a computer on the network already.

Support for Pocket PC (PPC)

Administrators and workers can access the worker console from any Windows CE device. Handheld support is included with your product and does not require any additional cost or configurations. Handheld support adds even greater flexibility for managing your product by extending functionality beyond the desktop.

You can access the Worker Console using the worker URL. The Worker Console features that are not supported include file upload. Some fields in lists throughout the Worker Console have been scaled down for better viewing on the lower resolution Pocket PC. Requirements

- Windows CE version 3
- Microsoft Internet Explorer 5.0 or higher
- Resolution: Standard Pocket PC dimensions of 240 x 320

Note While the Worker Console is fully supported with the exceptions noted above, the Administrator Console is not currently supported on the Pocket PC platform. The Administrative Console will load on a Pocket PC device. However, the screen is not properly formatted for the reduced screen resolution size of most handhelds. Administrative features can be executed on a handheld device by directly accessing the URLs for those features.

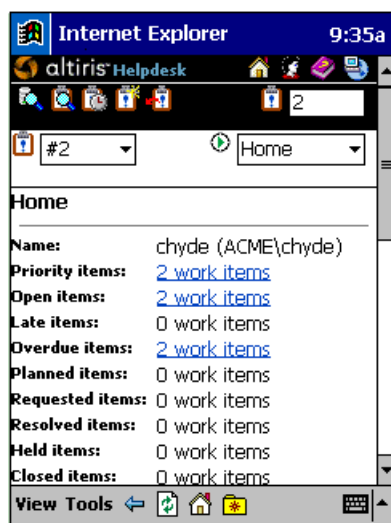
Pocket PC Navigation

There is a dropdown for recent work items at the top of the Worker Console. Select a work item number and click the **View Work Item** icon to the left of the dropdown to view the report for the item.

To view the report for an item not displayed in the dropdown, the standard toolbar has been included so that the worker can enter a work item number in the **Edit** field and click the **View Work Item** icon to the left of the **Edit** field on the toolbar.

Work item actions are not displayed as a horizontal list for the Pocket PC, but have been added to the command dropdown. Select an action and click the green arrow icon to the left of the dropdown to perform the action. The action will be performed on the work item that is selected in the recent work item dropdown that appears to the left. This dropdown is shared by commands that are available on the **Work items** tab.

Work item commands are available by clicking the home icon at the top of the console. All commands for the **work item** command group will populate the command dropdown (this is a shared dropdown). Execute a command by selecting it from the dropdown and clicking the green arrow icon.



Chapter 7:

Administration

The **Administration** topic list, includes the following:

- [Helpdesk Admin Console \(page 97\)](#)
 - [Commands \(page 97\)](#)
 - [Common tasks \(page 97\)](#)
- [The Admin Report \(page 98\)](#)
 - [Admin Report Page Field Description \(page 99\)](#)
 - [Run Admin Reports \(page 99\)](#)
- [Categories \(page 100\)](#)
 - [List Categories \(page 100\)](#)
 - [List Categories Page Description \(page 100\)](#)
 - [Edit Categories \(page 101\)](#)
 - [Add New Category \(page 102\)](#)
 - [Modify Category \(page 103\)](#)
 - [Move Category \(page 104\)](#)
 - [Copy Category \(page 105\)](#)
 - [Delete Category \(page 106\)](#)
- [Routing Rules \(page 107\)](#)
 - [List Routing Rules \(page 107\)](#)
 - [Edit Routing Rule \(page 108\)](#)
 - [Process Order of Routing Rules \(page 108\)](#)
 - [New Routing Rule \(page 109\)](#)
 - [Delete Routing Rules \(page 111\)](#)
- [Notify Rules \(page 112\)](#)
 - [List Notify Rules \(page 112\)](#)
 - [New Notify Rule \(page 113\)](#)
 - [Edit Notify Rule \(page 115\)](#)
 - [Delete Notify Rules \(page 116\)](#)
- [E-mail Templates \(page 117\)](#)
 - [List Templates \(page 117\)](#)
 - [New Template \(page 118\)](#)
 - [Edit E-mail Templates \(page 119\)](#)
 - [Default E-mail Templates. \(page 119\)](#)
- [E-mail Template Macros \(page 120\)](#)

- [Simple Macros \(page 120\)](#)
- [Complex Macros \(page 121\)](#)
- [Mail Macros \(page 121\)](#)
- [Bulletins \(page 122\)](#)
 - [List Bulletins \(page 122\)](#)
 - [Add New Bulletin \(page 123\)](#)
 - [Delete Bulletin \(page 123\)](#)
- [Sources \(page 124\)](#)
 - [List Sources \(page 124\)](#)
 - [View Source \(page 124\)](#)
 - [New NS Source \(page 125\)](#)
 - [New SMS Source \(page 125\)](#)
 - [Edit Source \(page 126\)](#)
 - [Import from Source \(page 127\)](#)
- [Configure Helpdesk \(page 128\)](#)
- [Delete Work Items \(page 130\)](#)
 - [Simple Tab \(page 130\)](#)
 - [Delete Work Item Simple Field Description \(page 131\)](#)
 - [Advanced Tab \(page 132\)](#)
 - [Delete Work item Advanced Field Description \(page 133\)](#)
- [Delete Contacts \(page 133\)](#)
- [Delete Assets \(page 134\)](#)
- [Workers \(page 135\)](#)
 - [List Workers \(page 135\)](#)
 - [New Worker \(page 135\)](#)
 - [Edit Worker \(page 136\)](#)
- [List Queue \(page 137\)](#)
 - [View Queue \(page 137\)](#)
 - [Edit Queue \(page 138\)](#)
 - [New Queue \(page 138\)](#)
- [Reports \(page 139\)](#)
- [Notification Policies \(page 140\)](#)
- [Service Level Agreements \(page 141\)](#)

Helpdesk Admin Console

The **Helpdesk Admin console page** is similar to the **Helpdesk Worker console** yet it provides additional functionality to perform administrative tasks. Access the **Admin console** through the **Altiris eXpress Helpdesk consoles**. For further details see [“Altiris eXpress Helpdesk Consoles”](#) on page 46

When **Helpdesk Admin console** is launched, the **Work report** default page just as it is with **Helpdesk Worker console**. The left-hand menu is divided into two sections, **Commands** and **Common tasks**. The menu options are as follows:

Commands

Admin

- Admin report** - Lets you modify worker properties. See [“The Admin Report”](#) on page 98.
- Categories** - Lets you add or modify categories. See [“Categories”](#) on page 100.
- Notify rules** - Lets you view, create, or delete notify rules. See [“Notify Rules”](#) on page 112.
- Routing rules** - Lets you view, create, or delete work item routing rules. See [“Routing Rules”](#) on page 107.
- E-mail templates** - Lets you view or create e-mail templates. See [“E-mail Templates”](#) on page 117.
- Bulletins** - Lets you view, create, or delete bulletins. See [“Bulletins”](#) on page 122.
- Sources** - Displays a list of SMS and Notification Server sources. See [“Sources”](#) on page 124.
- Configure helpdesk** - Lets you configure the Helpdesk SQL database. See [“Configure Helpdesk”](#) on page 128.

Work items

- See [“New Work Item”](#) on page 50

Contacts

- See [“Contacts”](#) on page 80

Assets

- See [“Assets”](#) on page 84

Workers

- See [“Workers”](#) on page 135

Recent

- See [“Recents”](#) on page 87

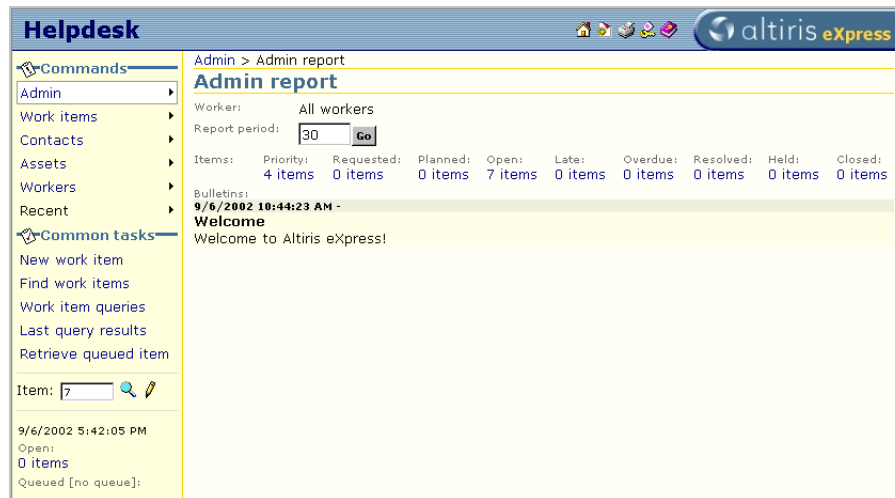
Common tasks

- New work items** - See [“New Work Item”](#) on page 50
- Work item queries** - See [“Using Queries”](#) on page 70
- Last query results** - See [“Last Query Results”](#) on page 79
- Retrieve queued item** - See [“Retrieve Queued Item”](#) on page 80

The Admin Report

The **Admin Report** will help sort and manage work items based on the **Report period** and selected query options. The report displays the **item count** for **All workers** in the following queries:

- Priority
- Requested
- Planned
- Open
- Late
- Overdue
- Resolved
- Held
- Closed



- 1 Open **Admin console** by entering either the complete URL <http://<server name>/aexhd/admin/Default.aspx> or by entering a shortcut (URL alias) if created. <OR>
- 2 Enter through the main entry point **Altiris eXpress Helpdesk consoles** - <http://<server name>/aexhd/>
- 3 Click **Helpdesk Admin console**.

Admin Report Page Field Description

Page Items

Item	Description
Report Period	Select how far back in time you want the summary report to go.
Priority items	Lists the number of Open work items with either High or “ASAP” priority status.
Requested items	Lists the number of work items flagged with the status as Requested .
Planned items	List the number of work items flagged with the status as Planned .
Open items	List the number of work items flagged as Open .
Late items	Lists the number of work items still Planned after the start date.
Overdue items	List the number of work items not Closed or Resolved after the due date.
Resolved items	List the number of work items flagged with the status of Hold .
Closed items	Lists the number of work items flagged with the status as Closed .
Cancel	Click to discard the changes.

Run Admin Reports

- 1 Type the number of days to search back in time in the **Report period** box.
- 2 Click **Go**. The database will return an item count of all work items based on the number of days search criteria.
- 3 Click the **item count** link to display the list of work items found.

The screenshot shows the Altrix eXpress Helpdesk interface. The main content area displays a table of open items modified in the last 30 days. The table has columns for Item ID, Title, Assigned, Priority, Status, Category, and Modified. There are 7 items listed. The left sidebar contains navigation options like Commands, Admin, Work items, Contacts, Assets, Workers, Recent, and Common tasks. The bottom status bar shows the current date and time, and the number of open and queued items.

#	Title	Assigned	Priority	Status	Category	Modified
1	Move my PC Level 2 Desk...	Level 2 Desk...	Medium	Open	Change-Move\Desktop	9/6/2002 4:44:...
2	Email doesn't Level 1	Level 1	Medium	Open	Not specified	9/6/2002 4:44:...
3	Phone is br... Level 2 Netw...	Level 2 Netw...	ASAP	Open	Break-Fix\Phone\No Dial T...	9/6/2002 4:48:...
4	Printer nee... Level 2 Desk...	Level 2 Desk...	Low	Open	How to\Install Printer Driv...	9/6/2002 4:48:...
5	Monitor is f... Level 2 Desk...	Level 2 Desk...	High	Open	Break-Fix\Desktop\Monitor	9/6/2002 4:51:...
6	Access to ... Level 2 Netw...	Level 2 Netw...	High	Open	Break-Fix\Network\No Co...	9/6/2002 5:09:...
7	Windows bl... Level 1	Level 1	ASAP	Open	Not specified	9/6/2002 5:14:...

Categories

List Categories

All **New work items** entered into the Helpdesk system must be associated with a **Category**. The **Categories** option is only available in the **Admin console**, you can **List**, **Edit** or **Delete** categories.

The screenshot shows the 'List categories' page in the Altrix eXpress Helpdesk Admin console. The page title is 'Categories' and the breadcrumb is 'Admin > Categories > List categories'. Below the title, it says 'Default category: Not specified' and 'Edit Category'. The main content is a table with the following data:

Name	Route to	Status
Not specified		Default
How to	Level 2	
...Access Email	Level 2 Desktop	
...Access the Web	Level 2 Desktop	
...Install Printer Drivers	Level 2 Desktop	
...Professional Services Training	Professional Services	
...Recover Deleted Files	Level 2 Desktop	
...Use Handheld	Level 2 Desktop	
...Use Phone	Level 2 Network	
...View Email Attachment	Level 2 Desktop	
...Other	Level 2	
Reset Password	Level 2 Server	
Break-Fix	Level 2	
...Copier	Level 2 Network	
...Desktop	Level 2 Desktop	
...Monitor	Level 2 Desktop	
...Modem	Level 2 Network	
...NIC	Level 2 Network	
...Keyboard	Level 2 Desktop	
...Mouse	Level 2 Desktop	
...Drive	Level 2 Desktop	
...Hood Lock	Level 2 Desktop	
...Machine Discovery	Level 2 Desktop	
...Other	Level 2 Desktop	
...Email	Level 2 Desktop	
...Email Won't Run	Level 2 Desktop	
...Not Receiving Email	Level 2 Network	
...Can't Send Email	Level 2 Network	

- 1 Open Admin console by entering either the complete URL <http://<server name>/aexhd/admin/Default.aspx> or by entering a shortcut (URL alias) if created. <OR>
- 2 Enter through the main entry point **Altiris eXpress Helpdesk consoles** - <http://<server name>/aexhd/> then click **Helpdesk Admin console**.
- 3 Click **Admin>Categories>List categories**.
- 4 Click **Edit** on the toolbar to go directly to the **Edit categories page**.

List Categories Page Description

Page Items

Item	Description
Default category	Select a Default category for items to be associated with if no category is selected at the time a work item is created.
Name	Name of the category work items will be associated with.
Status	The category is Active .

Edit Categories

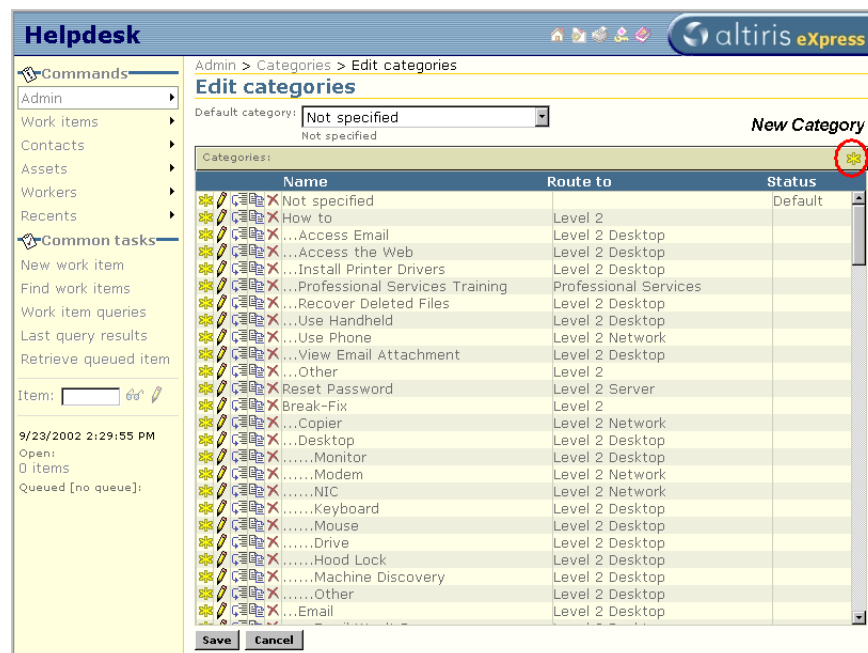
The **Edit categories** page displays a list of all categories used to group work items together however the workers see fit. The default set of categories cover a large portion of the problems typically encountered by the Helpdesk workers.

Categories use a hierarchical structure following a parent, child relationship. Main topic categories can be created with similar or same like topics created as levels below.

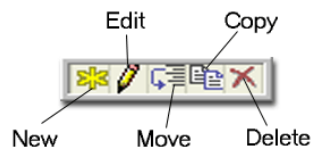
Example

- Parent main topic **Break-Fix**
- Child topic **...Copier**
- Child topic **...Desktop**
- Child sub-topic **.....Monitor**
- Child sub-topic **.....Keyboard**

As you can see, all child topics fall below **Break-Fix**; however, **Desktop** needed further category topics to define elements of the desktop.

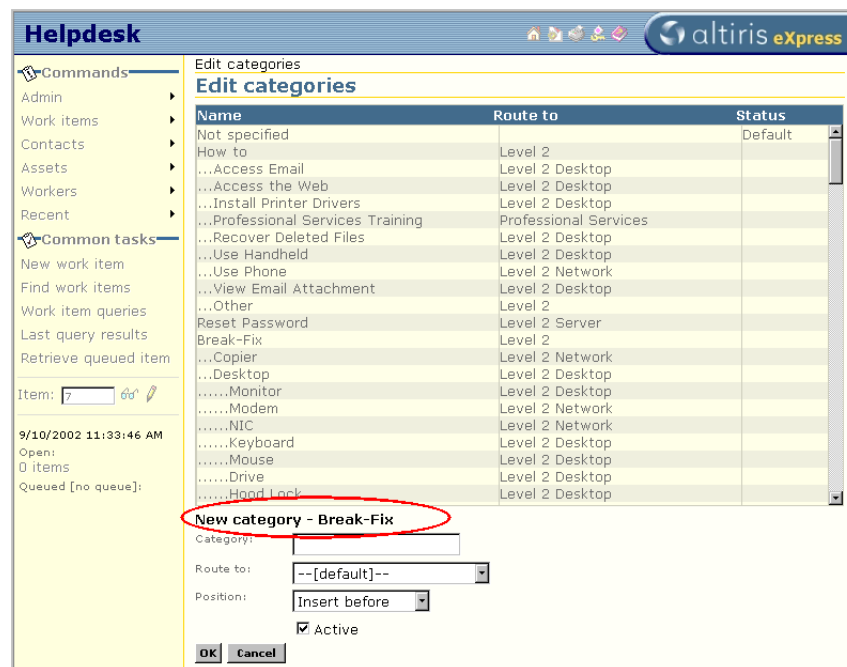


The icons shown below allow you to **Add**, **Edit**, **Move**, **Copy** or **Delete** categories. Click on the appropriate icon to perform the desired function.



Add New Category

You can add new categories to the Helpdesk database by following the steps below.

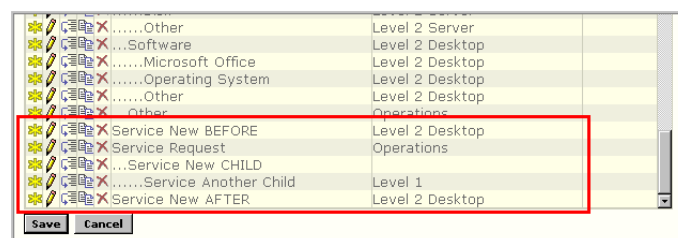


- 1 Click **Admin>Categories>Edit categories**.
- 2 Use the scroll-bar to view all categories currently in the system. Click **New** next to the category where you want to insert a new category.

Note The category you selected is displayed on the bottom of the screen. See the example above.
- 3 Type the name of the **Category** in the box.
- 4 Select the **Position** for the new category from the drop-down list. The option you select determines how the new category will be inserted in the category list. The options are:

- **Insert before**
- **Insert after**
- **Insert as a child**

Example The Service Request category

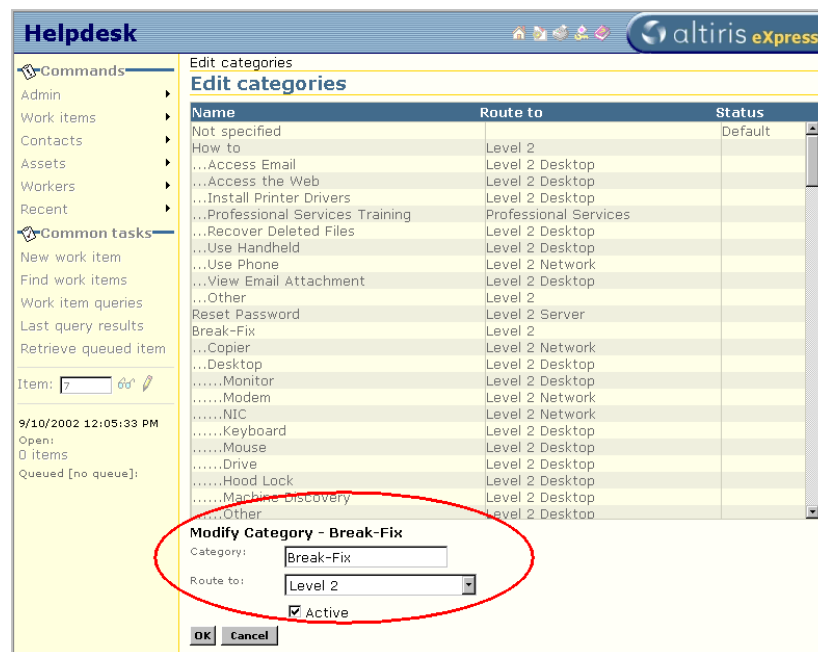


- 5 Click **OK** to continue editing categories. The new category will insert into the category list based on the **Position** selected.

Important Any changes you make to categories, add **New**, **Edit**, **Move**, **Copy** or **Delete** are not actually saved until you click **Save** on the **Edit categories** page.

Modify Category

You can modify existing categories to meet your operational requirements. Following the illustration and steps listed below.



- 1 Click **Admin>Categories>Edit categories**.
- 2 Click **Edit** next to the category you want to edit.

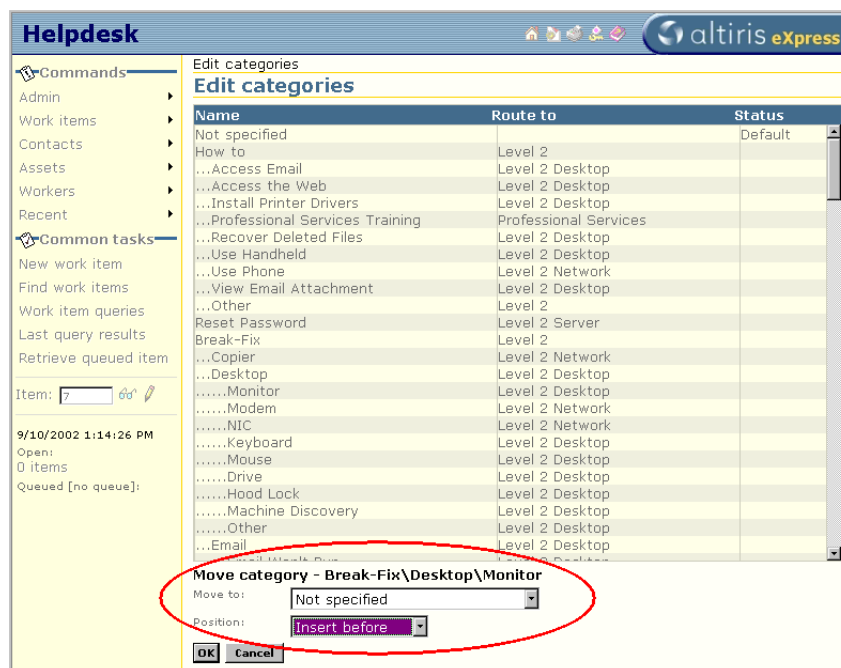
Note The category you selected is displayed on the bottom of the screen. See the example above.
- 3 Type the name of the **Category** in the box.
- 4 Select the check box to make category status **Active**.
- 5 Click **OK** to continue editing categories. The category list on the **Edit categories page** will update and display the category change in the list.

Important Any changes you make to categories, add **New**, **Edit**, **Move**, **Copy** or **Delete** are not actually saved until you click **Save** on the **Edit categories page**.

- Click **Save** to keep *all* category changes and return to the **List categories** page.

Move Category

Use the move function to move a category and its children up and down the category tree.



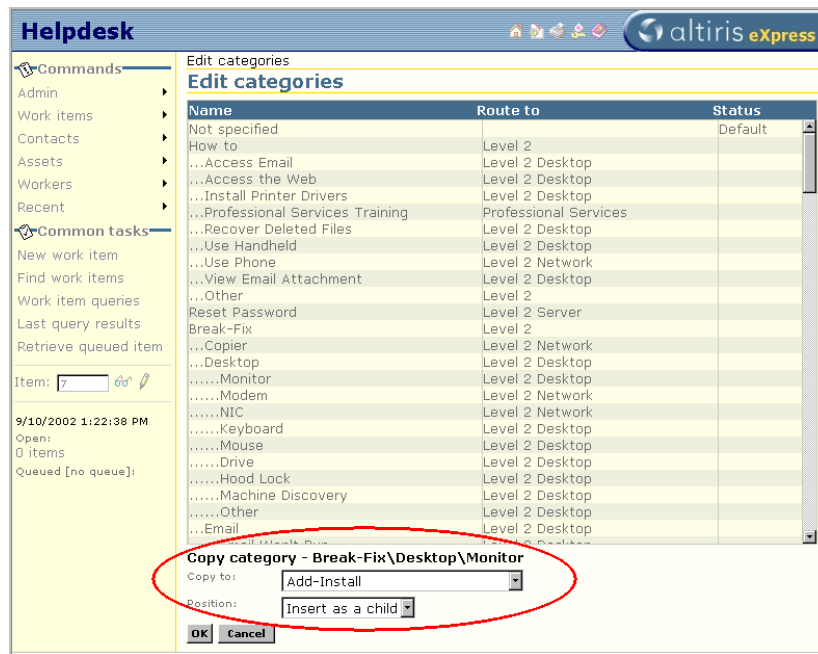
- Click **Admin>Categories>Edit categories**.
- Click **Move** next to the category you want to edit.

Note The category you selected is displayed on the bottom of the screen. See the example above.
- Select the **Move to** category from the drop-down list.
- Select the **Position** for the category from the drop-down list.
- Click **OK** to continue editing categories. The category list on the **Edit categories** page will update showing the category change.

Important Any changes you make to categories, add **New**, **Edit**, **Move**, **Copy** or **Delete** are not actually saved until you click **Save** on from the **Edit categories** page.
- Click **Save** to keep *all* category changes and return to the **List categories** page.

Copy Category

Categories can be copied from one to another by using the **Copy** command.

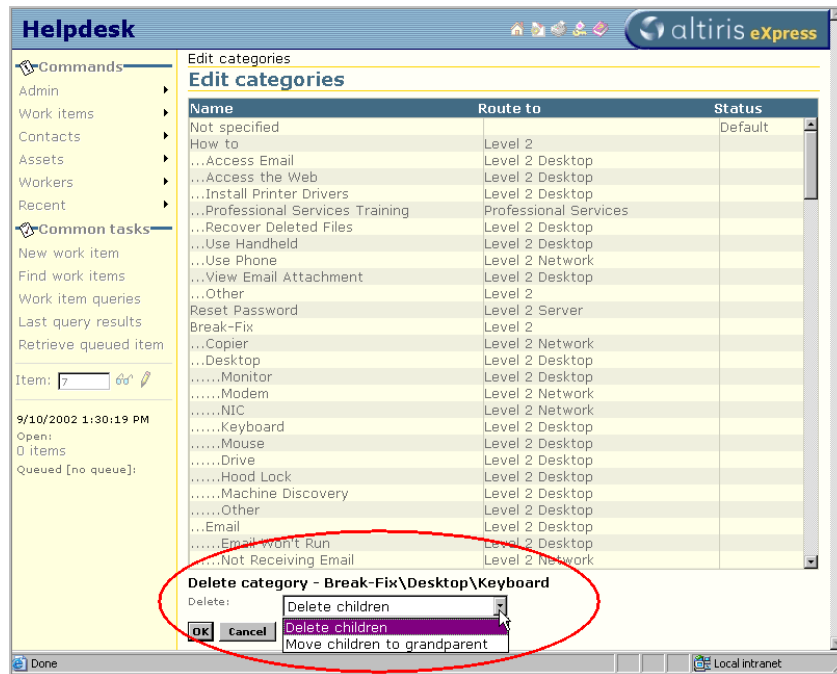


- 1 Click **Admin>Categories>Edit categories**.
- 2 Click **Copy** next to the category you want to edit.

Note The category you selected is displayed on the bottom of the screen. See the example above.
- 3 Select the **Copy to** category from the drop-down list.
- 4 Select the **Position** for the category from the drop-down list.
- 5 Click **OK** to continue editing categories. The category list on the **Edit categories page** will update showing the category change.

Important Any changes you make to categories, add **New**, **Edit**, **Move**, **Copy** or **Delete** are not actually saved until you click **Save** on the **Edit categories page**.
- 6 Click **Save** to keep **all** category changes and return to the **List categories page**.

Delete Category



- 1 Click **Admin>Categories>Edit categories**.
- 2 Click **Delete** next to the category you want to delete.

Note The category you selected is displayed on the bottom of the screen. See the example above.
- 3 Select the **Delete** option from the drop-down list.
 - Delete children
 - Move children to grandparent
- 4 Click **OK** to continue editing categories. The category list on the **Edit categories page** will update excluding the deleted category.

Important Any changes you make to categories, add **New**, **Edit**, **Move**, **Copy** or **Delete** are not actually saved until you click **Save** on the **Edit categories page**.
- 5 Click **Save** to keep **all** category changes and return to the **List categories page**.

Routing Rules

Routing rules determine what worker or queue a work item should be assigned to when it is created or modified. A routing rule consists of a name, description, criteria, status, terminal flag, and a worker to assign the work item to when the criteria evaluate to true.

Routing rules are executed in the order they appear in the **List Rules** command from top to bottom. For each rule in the list, the criteria are evaluated. If the criteria are satisfied the work item is assigned to the worker specified by the rule. If that rule is set to be a terminal rule, then the rest of the rules are not evaluated. If the rule criteria are not satisfied or the rule is not marked as a terminal rule, the next rule is selected and rule evaluation proceeds. Routing rules are always evaluated every time a work item is created or edited.

Routing rules replace the category routing feature found in earlier versions of Helpdesk. The initial set of rules is constructed from the category routing data previously managed by Helpdesk, as is the default worker. This means that the routing behavior of Helpdesk after upgrading from an earlier version of Helpdesk is identical.

Routing rules are much more powerful than the old category routing system. Administrators can make routing decisions based on any field in the work item in combination or in sequence. A special criteria: **"Work item is unassigned"**, makes it easy to use the idea that routing only occurs when no worker is assigned to a work item, as was the case in the previous category routing feature; however, not using that criteria can give administrators very fine control based on other fields.

For example, a routing rule like **"Assign to the Supervisor queue if the contact_vip_flag is true and priority is ASAP"** is easy to create, and will make the assignment no matter who the work item is currently assigned to. A subsequent rule could be added that says **"Assign to worker Kathi when current worker is Supervisor and workitem_category contains 'Documentation'"**. Then, a work item from a VIP contact that is about documentation will get routed to Kathi no matter what.

Note If a worker attempts to assign that work item to Dave, the worker might be confused when Kathi is still the assigned worker

List Routing Rules

The **List routing rules page** displays a list of all routing rules by **Name**, **Route to**, **Comment** **Status** and **Terminal** columns. The toolbar on top of the page shows the following icons:

- New rule
- Edit rule
- Move rule up
- Move rule down
- Delete rule

Name	Route to	Comment	Status	Terminal
> Route to Asset Management	Asset Management	20 categories.	Active	Yes
> Route to Level 2 Desktop	Level 2 Desktop	59 categories.	Active	Yes
> Route to Level 2 Network	Level 2 Network	39 categories.	Active	Yes
> Route to Level 2 Server	Level 2 Server	21 categories.	Active	Yes
> Route to Operations	Operations	12 categories.	Active	Yes
> Route to Human Resources	Human Resources	1 categories.	Active	Yes
> Route to Professional Services	Professional Services	1 categories.	Active	Yes
> Route to Deployment/CSW Delivery	Deployment/CSW Delivery	3 categories.	Active	Yes
> Route to Level 2	Level 2	9 categories.	Active	Yes

To List Routing Rules

- 1 Click **Admin > Routing rules > List routing rules**.
- 2 Click the arrow (>) next to the routing rule; the row is highlighted.
- 3 Click the **New, Edit, Up, Down**, or **Delete** icons on the toolbar.

To Route Work Items to a Specific Worker or Queue

- 1 Click the arrow (>) next to the routing rule; the row is highlighted.
- 2 Click drop-down arrow and select a worker or a queue, and then click **Set**.

The Routing rule, when true, will send all work items to the worker or queue you selected.

Process Order of Routing Rules

The Routing rules are processed in the order they are listed. You can change the order as needed by following the steps below.

Name	Route to	Comment	Status	Terminal
> Route to Asset Mana	Asset Management	20 categories.	Active	Yes
> Route to Level 2 Des	Level 2 Desktop	59 categories.	Active	Yes
> Route to Level 2 Net	Level 2 Network	39 categories.	Active	Yes
> Route to Level 2 Serv	Level 2 Server	21 categories.	Active	Yes
> Route to Operations	Operations	12 categories.	Active	Yes
> Route to Professional	Professional Services	1 categories.	Active	Yes
> Route to Human Reso	Human Resources	1 categories.	Active	Yes
> Route to Deployment	Deployment	3 categories.	Active	Yes
> Route to Level 2	Level 2	9 categories.	Active	Yes

To Change the Process Order of Route rules

- 1 Click the arrow (>) next to the **Routing rule**; the row is highlighted.
- 2 Click the **Up** or **Down** arrow on the toolbar.

The routing rule moves one level above or one level below its current location within the list. Repeat this step as needed until the **Routing rules** are in the process order you want.

Edit Routing Rule

To Edit a Routing Rule

- 1 Click the arrow (>) next to the **Routing rule**; the row is highlighted.
- 2 Click **Edit** on the toolbar.
- 3 The **Editing routing rule page** allows you to make changes to the route rule fields. See [“New Routing Rule”](#) on page 109 for field description.

New Routing Rule

The screenshot shows the 'New routing rule' form in the Altiris eXpress Helpdesk interface. The form is titled 'New routing rule' and is located under 'Admin > Routing rules > New routing rule'. The form includes the following fields and options:

- Name:** A text input field.
- Comment:** A text area for describing the rule.
- Route to:** A dropdown menu currently set to '--[unassigned]--'.
- Where:** A checked checkbox labeled 'Work item is unassigned.'
- And:** A dropdown menu set to 'All of these criteria are true'.
- Criteria List:** A list box with an 'Add' button and a 'Title' dropdown menu.
- Active:** A checked checkbox labeled 'Active - evaluate this rule during an item update.'
- Terminal:** A checked checkbox labeled 'Terminal - stop processing rules when this rule evaluates to true.'

At the bottom of the form are 'OK' and 'Cancel' buttons.

To Create a New Routing Rule

- 1 Click **Admin > Routing rules > New routing rule**.
- 2 Enter a name for the **New routing rule** in the **Name** text box.
- 3 Enter description of what the rule is for, in the **Comment** text box.
- 4 Click the drop-down arrow and select a worker or queue for the new **Route to** assignment.
- 5 Clear the check box if the routing rule should apply to all work items; otherwise, the rule will apply to *only unassigned* work items.

Note When the routing rule runs, it will evaluate this criteria first, before evaluating the other criteria based on the drop-down list option in step 6 on page 109. If the rule's criteria evaluates to true, the assignment will change. This means that workers who explicitly assign the work item, might be surprised or confused when this rule changes their assignment.

- 6 Click the drop-down arrow and select one of the options:
 - All of these criteria are true
 - Any of these criteria are true
- 7 Click the drop-down arrow next to **Add**, and then select a criteria type from the list.
- 8 Click **Add**.

The page will display options to enter criterion parameters. The layout varies depending on the criterion selected.

The screenshot shows the 'New routing rule' form with the criteria configuration step. The form is titled 'New routing rule' and is located under 'Admin > Routing rules > New routing rule'. The form includes the following fields and options:

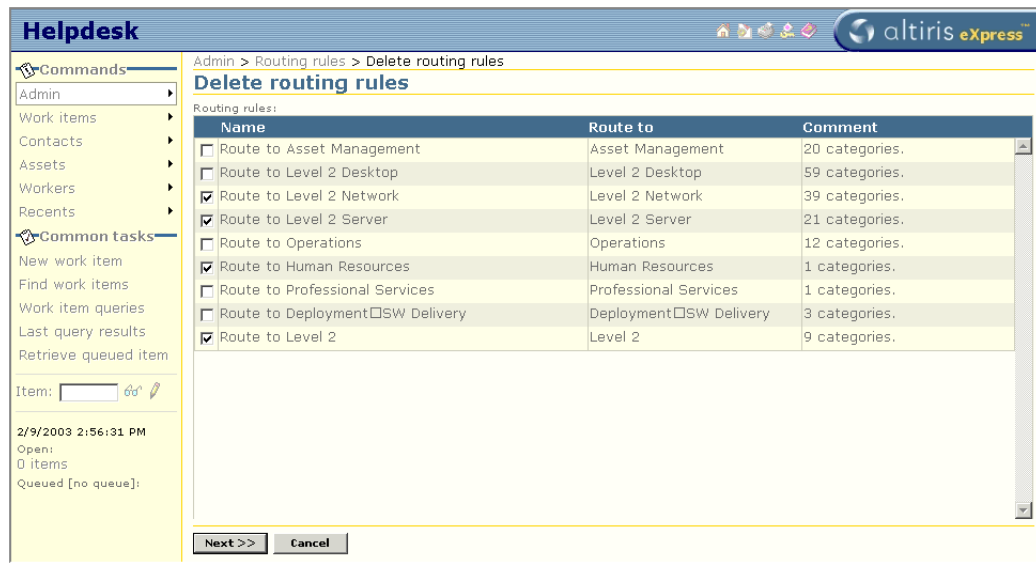
- Field:** A dropdown menu set to 'Title'.
- This criterion is true when:** Two checked checkboxes: 'The value of the field changes' and 'The value of the field:'. Below the second checkbox is a dropdown menu set to 'is the same as'.
- Monitor:** A text input field.
- Case sensitive:** An unchecked checkbox.

At the bottom of the form are 'OK' and 'Cancel' buttons.

- 9 Select the check box if **The value of the field changes**.

- 10 Select the check box for **The value of the field**.
- 11 To make this criterion be true if the field has changed AND the test is true, check both the “The value of the field changes”, and “The value of the field:” check boxes.
- 12 Click the drop-down arrow and select one of the following options:
Note The list varies depending on criterion selected.
 - is the same as
 - is not the same as
 - contains
 - does not contain
 - matches regular expression
- 13 Enter the parameter associated with the option you selected for step 12 on page 110, in the text box.
- 14 Select the check box for the search to be **Case sensitive**.
- 15 Click **OK**.
The page returns to the **New Routing rule** options.
- 16 Review the routing criterion you created in the display box. You can edit or delete the criterion listed by doing the following:
 - Select the criterion from the display list.
 - Click the **Edit** or **Delete** icon on the toolbar.
- 17 Clear the **Active** check box if you do not want the **New routing rule** active.
- 18 Clear the **Terminal** check box if you do not want to stop processing rules when this rule evaluates to true.
- 19 Click **OK**.

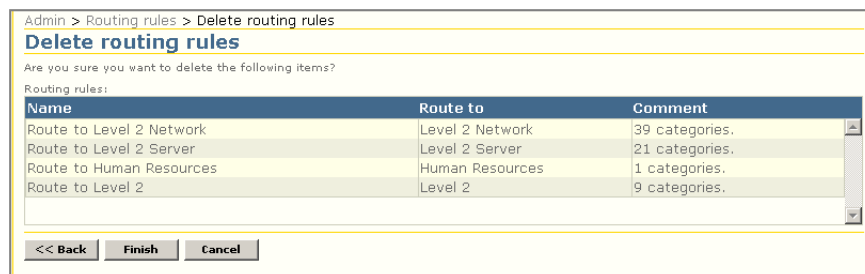
Delete Routing Rules



To Delete a Routing Rule

- 1 Click **Admin > Routing rules > Delete routing rules**.
- 2 Select the check box of the **Route rule** you want to delete from the list, and then click **Next**.

The following confirmation screen appears.



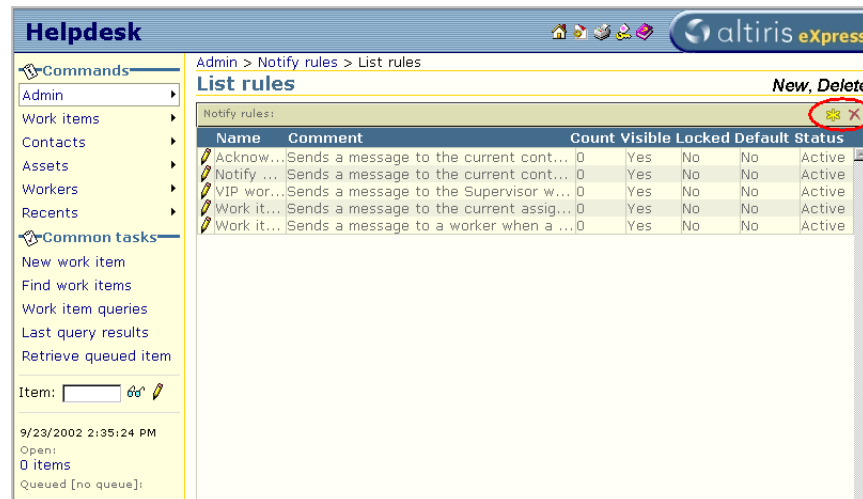
- 3 Review the displayed list.
- 4 Click **Finish**, or **Back** to change **Delete route rules** list.

Notify Rules

E-mail notification is used to automatically generate and send e-mail and pager e-mail messages in response to work item modification. Notify rules describe what work item modifications must take place before e-mail is generated and sent, the format of the message that gets sent (see “E-mail Templates” on page 117), and who should receive the e-mail notification.

List Notify Rules

The **Notify rules page** lists all notification rules currently defined. Administrative users can **Edit** a notify rule, add a **New** notify rule, or **Delete** notify rules.



- 1 Click **Admin>Notify rules>List rules**.
- 2 Click **Edit** next to the specific **Notify rule** to view or edit rule.

Default Rules

The Helpdesk Solution provides a set of default notification rules, they are as follows:

Notify Rules Provided by Helpdesk Solution

Item	Description
Acknowledge contact	Sends a message to the current contact when a work item is first created.
Notify contact when closed	Sends a message to the current contact when the work item has been closed. This is appropriate for Helpdesk Solution guests. It thanks the recipient and describes the resolution.
VIP work item	Sends a message to the Supervisor when work item is initiated by a VIP contact (assumes that Supervisor virtual worker has a valid e-mail address)
Work item changed	Sends a message to the current assignee whenever a change occurs in the work item.
Work item reassigned	Sends a message to a worker when a work item has been reassigned.

New Notify Rule

Admin > Notify rules > New rule

New rule

Name:

Comment:

Send e-mail:

Send pager e-mail:

Send to:

Current contact

These workers:

- Assigned worker
- Modified by worker
- Previously assigned worker
- Created by worker
- Asset Management
- Deployment-SW Delivery
- Helpdesk
- These addresses:

These addresses:

Enter one or more e-mail addresses separated by ",".

Where:

Visible - allow workers to see this rule

Locked - prevent workers from turning this rule on or off

Default - make this rule a default for new items

Active - evaluate this rule during an item update.

- 1 Click **Admin>Notify rules>New rule**.
- 2 Type the name of the **Rule** in the box.
- 3 Type a description of the rule in the **Comment** box.
- 4 Select the **Send e-mail** template from the drop-down list.

The template is used to generate an e-mail message that gets delivered when the rule runs. An e-mail message template or a pager e-mail message template or both, are required when creating a notify rule.
- 5 Select the **Send pager e-mail** template from the drop-down list.

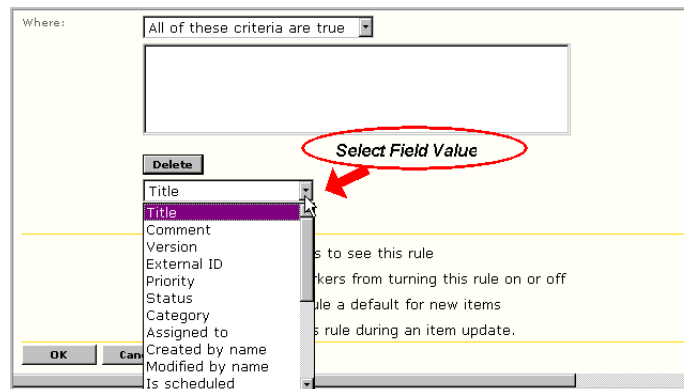
The template is used to generate the pager e-mail message that gets delivered when the rule runs. An e-mail message template or a pager e-mail message template or both are required when adding a notify rule.
- 6 Select or type the following **Send to** information:
 - a Select the check box next to **Current contact** to send an e-mail to the current contact when this rule runs.
 - b **These workers:** Select the check box next to the worker or queue to whom e-mail should be delivered when this rule runs. Use the scroll-bar to view the list, select all that apply.
 - c **These addresses:** Workers or queues not listed in the “**These Workers**” list can still receive notification by entering additional e-mail addresses in the box. Use a “;” to separate multiple e-mail entries. (**Example** worker1@hotmail.com;worker2@aol.com.)
- 7 **Where:** Select the **criteria value** from the drop-down list which determines how the rule is evaluated when it runs.

Each criteria consists of a **field**, an **operator**, **evaluation conditions** and a **value**.

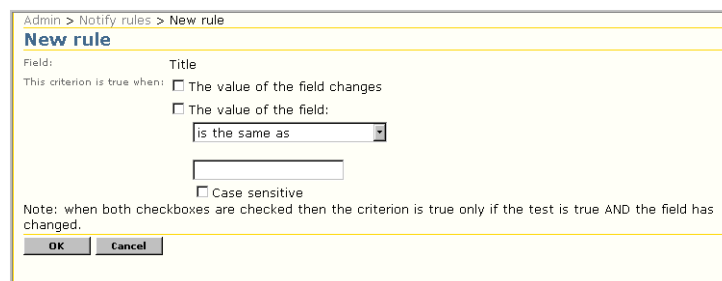
- “**All of these criteria are true**” means that all of the criteria must evaluate to true in order for this rule to run.

- “**Any of these criteria are true**” means that if one of the criteria evaluates to true then the rule will run.

- 8 Select a **value** from the drop-down list. Values can be four different types: string field operators and UI, numeric, boolean and lookup operators and UI.



- 9 Click **Add** and the following screen appears:



The **Field** selected is displayed at the top of the screen. Select or type the following values to further define the functionality of the rule. The rule applies based on the conditions defined below.

Note This option will vary depending on the value you select. Follow the screen prompts as outlined below, selecting those criteria for each value type.

a This criterion is true when:

- Select the check box next to **The value of the field changes**.
- Select the check box next to **The value of the field**, then select an option from the drop-down list. The options are as follows:
 - is the same as
 - is not the same as
 - contains
 - does not contain
 - matches regular expression
- b** Type a value to test condition in the box, be sure to select the check box if **Case sensitive** is required.
- c** Click **OK** to add the criterion value, it will appear in the box on the **New rule screen**.

- 10 If the added criterion is not correct or no longer needed, highlight the criterion in the display list and click **Delete** to discard.

- 11 Clear the check box if the rule **IS NOT Visible**.

Visible - Allow workers to see this rule: A rule that is not visible will not show up in the list of **Notify rules** display when creating a new work item or in the **Notify action**.

- 12 Select the check box for the rule to be **Locked**.

Locked - Prevent workers from turning this rule on or off: A rule that is locked, if visible, will show up in the list of **Notify rules** display when creating a new work item or in the **Notify action** but cannot be modified by the user.

- 13 Select the check box for the rule to be **Default**.

Default - Make this rule a default for new items: Default rules are assigned and associated with new work items. Non default rules are not automatically assigned to new work items.

- 14 Clear the check box if the rule **IS NOT Active**.

Active - Evaluate this rule during an item update: The rule will be evaluated when work items with that rule are modified and may run if the criteria are satisfied. Non active rules will not run.

- 15 Click **OK** to save.

Edit Notify Rule

Edit rule
Edit notify rule - Acknowledge contact

Name:

Comment:

Send e-mail:

Send pager e-mail:

Send to:

Current contact

These workers:

Assigned worker

Modified by worker

Previously assigned worker

Created by worker

Asset Management

Deployment-SW Delivery

Helpdesk

These addresses:

Enter one or more e-mail addresses separated by ";".

Where:

Visible - allow workers to see this rule

Locked - prevent workers from turning this rule on or off

Default - make this rule a default for new items

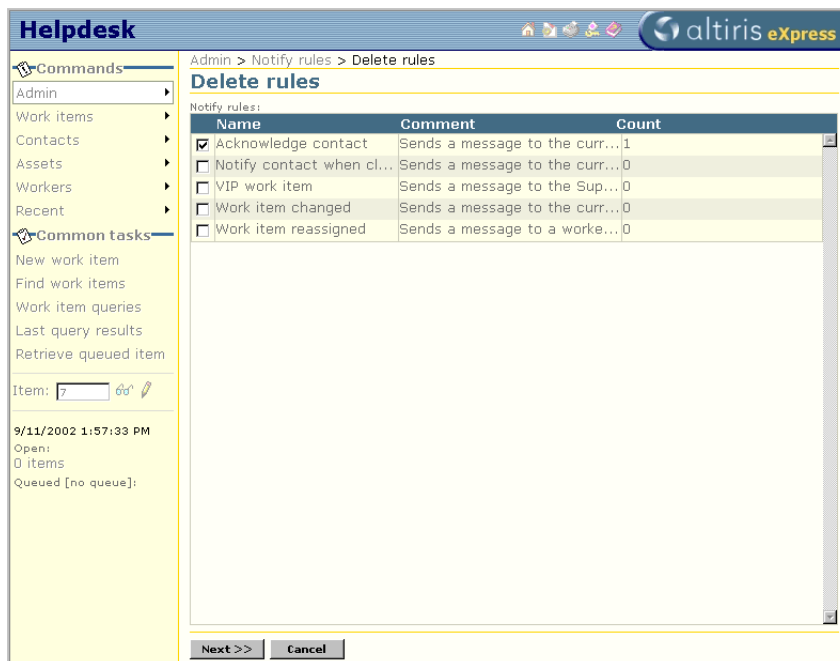
Active - evaluate this rule during an item update.

- 1 Click **Admin>Notify rules>List rules**.
- 2 Click **Edit** next to the **Notify rule** to edit.
- 3 Edit the form. For information on each of the fields, see [“New Notify Rule”](#) on page 113.
- 4 Click **OK** to save.

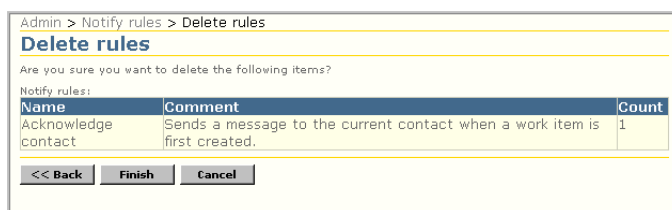
Delete Notify Rules

Deleting a rule will remove it completely from the system. All work items associated with the rule you delete will lose their association and will never be seen again.

Caution There is no **Undo** capability.



- 1 Click **Admin>Notify rules>Delete rules**.
- 2 Select the check box next to the Notify rule(s) you want to delete, then click **Next**.
- 3 The notification rule(s) you are about to delete will appear on the screen.



A prompt will display the following message:

Are you sure you want to delete the following items?

- 4 Click **Back** to change selected **Notify rules** to delete.
- 5 Click **Finish** to delete selected **Notify rules**.

E-mail Templates

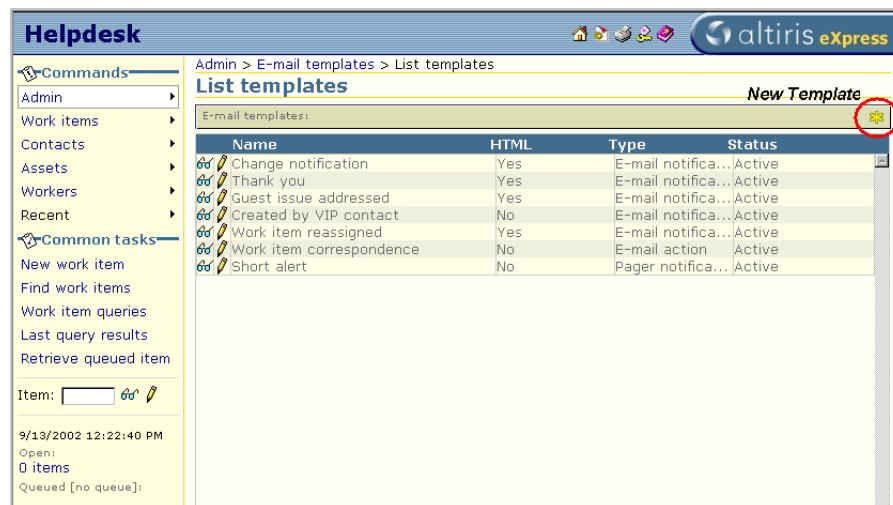
E-mail notification is used to automatically generate and send e-mail and pager e-mail messages when a **New work item** is created or when an existing work item is modified. E-mail templates are created by Administrators and define the format of how the contents of e-mail messages are sent to contacts. The format for e-mail templates can be simple using straight text or complex using HTML and macros.

List Templates

There are three types of e-mail templates, they are as follows:

- **E-mail notification** - Best used for notification rules that deliver long formatted messages.
- **Pager notification** - Best used for notification rules that use short text-only messages.
- **E-mail action** - Used for the work item e-mail operation.

Additionally, a very sophisticated macro language is supported and can insert work item data directly into e-mail template data fields.



- 1 Click **Admin>E-mail templates>List templates**.
- 2 Click **View** or **Edit** next to the specific **E-mail template** to view or edit template.
- 3 Click **New** to add a new template.

New Template

When you are adding or editing an e-mail template, you can use special macros in the message fields to represent Helpdesk Solution data that will be inserted by Helpdesk Solution when it generates e-mail using that template. See [“E-mail Template Macros”](#) on page 120.

- 1 Click **Admin>E-mail templates>New template**.
- 2 Type a **Name** for the new e-mail template in the box.
- 3 **From:** Type the name of the organization, workgroup or worker that will be displayed as the originator of the message.
- 4 **From Address:** Type the e-mail address that will be displayed as the originator of the message. The Macro Language is supported for this property but must resolve to a valid SMTP e-mail address: someone@somewhere.org.
- 5 **Subject:** Type the subject of the e-mail message. Macro Language is supported for this property.
- 6 **Type:** Select one of the following options from the drop-down list:
 - a **E-mail notification** - Select if the E-mail Template will be distributed through e-mail.
 - b **Pager notification** - Select if the E-mail Template is intended for pager e-mail notification.
 - c **E-mail action** - Select to let the E-mail Template be used to send work item e-mail correspondence.
- 7 Type a description of the e-mail template in the **Comment** box.
- 8 **Body:** Type the body of the e-mail message. Macro language is supported for this property (see [“E-mail Template Macros”](#) on page 120).
- 9 Select the check box to **Interpret message body as HTML**. HTML tags used within the body of the message, will be rendered by e-mail applications that support HTML format.
- 10 Clear the check box if you **DO NOT** want the e-mail template **Active**. Inactive e-mail templates will not be available for selection when adding **Notify rules**.
- 11 Click **OK** to save the e-mail template.

Edit E-mail Templates

The screenshot shows a dialog box titled "Edit e-mail template" with the subtitle "Edit e-mail message template - Change notification". The fields are filled as follows:

- Name:** Change notification
- From:** Altiris eXpress Helpdesk
- From address:** noreply@possible
- Subject:** Work item #WORKITEM(workitem_number) changed by WORKITEM(modified_by_worker_name)
- Type:** E-mail notification
- Comment:** Terse HTML message used to notify workers when modifications are made to a work item assigned to them.
- Body:**

```
<HTML>
<HEAD>
<TITLE>Altiris eXpress Helpdesk</TITLE>
<LINK REL="stylesheet" TYPE="text/css" HREF="URLALIAS
(HelpdeskURL)/css/cssStandard.css"/>
</HEAD>

<BODY BGCOLOR="#FFFFFF" TOPMARGIN="0" LEFTMARGIN="0" MARGINWIDTH="0"
MARGINHEIGHT="0" TEXT="#000000" ALINK="#ff0000" LINK="#0033cc" VLINK="#0033cc">
<BASEFONT FACE="Verdana,Arial,Helvetica,Sans-Serif" SIZE="2" />

<!-- Header ===== -->

<TABLE BORDER="0" CELSPACING="0" CELLPADDING="0" WIDTH="100%">
```
- Interpret as HTML
- Active

Buttons: OK, Cancel

- 1 Click **Admin>E-mail templates>List templates**.
- 2 Click **Edit** next to the **E-mail template** name.
- 3 Edit the fields. For information on each of the box entries, see [“New Template”](#) on page 118.
- 4 Click **OK** to save.

Default E-mail Templates.

E-mail Templates Provided by Helpdesk Solution

Item	Description
Change notification	Terse HTML message used to notify workers when modifications are made to a work item assigned to them.
Thank you	An acknowledgement message appropriate for Helpdesk Solution guests. Thanks the recipient and confirms the submitted data.
Guest issue addressed	A notification message appropriate for Helpdesk Solution guests. Thanks the recipient and describes the resolution.
Created by VIP contact	Plan text message used to notify workers that a work item has been created by a contact that is a designated VIP.
Work item reassigned	A message saying that a work item assigned to the recipient has been assigned to someone else.
Work item correspondence	Plain text message for corresponding about work items.
Short alert	Short message for paging workers.

E-mail Template Macros

When you are adding or editing an e-mail template, you can use special macros in the message for the **From**, **Subject** and **Body** boxes to represent data that will be inserted by Helpdesk Solution when it generates e-mail using the template. There are three different classes of macros: simple, complex and mail.

Simple Macros

Simple macros resolve into a single value or work item data.

WORKITEM(<workitem_field>)	<p><workitem_field> is the name of a field in the current work item (the one that was just updated). The value of that field replaces the macro.</p> <p>For Example: WORKITEM(workitem_number) will be replaced with the work item's number.</p> <p>The list of valid fields corresponds to the columns in the workitem_current_view view.</p>
CONTACT(<contact_field>)	<p><contact_field> is the name of a field in the record of the contact that is associated with the current work item. Note All contact information is available using the WORKITEM() macro.</p>
MANAGEDOBJECT(<managed_object_field>)	<p><managed_object_field> is the name of a field in the record of the asset that is associated with the current work item. All asset information is available using the WORKITEM() macro.</p>
ASSIGNED_TO_WORKER(<worker_field>)	<p><worker_field > is the name of a field in the record of the worker that is associated with the current work item as the <i>assigned to worker</i>. Most <i>assigned to worker</i> information is available using the WORKITEM() macro</p> <p>Use ASSIGNED_TO_WORKER () to see information such as ASSIGNED_TO_WORKER (worker_organization_name) that is not available through the WORKITEM() macro.</p>
MODIFIED_BY_WORKER(<worker_field>)	<p><worker_field > is the name of a field in the record of the worker that is associated with the current work item as the <i>modified by worker</i>. Most <i>modified by worker</i> information is available using the WORKITEM() macro.</p> <p>Use MODIFIED_BY_WORKER () to see information such as MODIFIED_BY_WORKER (worker_organization_name) that is not available through the WORKITEM() macro.</p>

Complex Macros

Complex macros define a format that can include a mix of text, HTML and Helpdesk Solution data fields that will be evaluated and replace the macro.

<p>HISTORY_LIST[[<format>]]</p>	<p><format> is a mix of text (including HTML tags), and arguments of the form \$\$<workitem_field>\$. The <workitem_fields> are identical to those used in the WORKITEM() macro. This macro will produce one “row” of data formatted according to the <format> for each history record for the current work item.</p> <p>If the current work item has been updated 5 times, then 5 rows will be output into the message. Each row has the \$\$<workitem_field>\$\$arguments replaced with the data from that particular work item update. Rows are produced in reverse chronological order (latest update first) so the data in the first row output using this macro will match the data in the WORKITEM() macro.</p> <p>For Example: <TABLE>HISTORY_LIST[[<TD>\$\$workitem_version\$\$</TD><TD>\$\$workitem_modified_on\$\$</TD><TD>\$\$workitem_modified_by_worker_name\$\$</TD>]]</TABLE></p> <p>will produce a simple HTML table that shows who has modified the work item and when, with the last update being the first row.</p>
<p>WORKITEM_LINK[[<format>]]</p>	<p><format> is a mix of text (including HTML tags), and arguments in the form \$\$<workitem_field>\$. The <workitem_fields> are identical to those used in the WORKITEM() macro. This macro will produce an HTML <A> tag with the HREF parameter set to the work item report command for the current work item. The text of the <A> tag is the evaluated <format>.</p> <p>For Example: WORKITEM_LINK[[[\$\$workitem_title\$\$-\$\$workitem_number\$\$]]</p> <p>produces (for work item #1 – title is “First work item”): First work item - 1</p> <p>The URL that is produced points to the standard work item report in Helpdesk Solution. If a person who reads this mail and clicks on the link is not a known Helpdesk Solution worker, then the normal challenge occurs. This macro is intended for e-mail messages that are sent to Helpdesk Solution workers in response to a work item being updated.</p>

Mail Macros

Mail macros are a class of macros that do formatted replacement but create format e-mail links. They allow you to provide your readers with an easy way to contact the workers associated with the current work item via e-mail and pager e-mail. The <format> argument for mail macros can be any string of text or HTML and can include \$\$<workitem_field>\$\$arguments.

- ASSIGNED_TO_EMAIL_LINK[[<format>]]
- MODIFIED_BY_EMAIL_LINK[[<format>]]
- MODIFIED_BY_PAGER_EMAIL_LINK[[<format>]]
- CREATED_BY_EMAIL_LINK[[<format>]]

- `CREATED_BY_PAGER_EMAIL_LINK[[<format>]]`

For Example:

Click `ASSIGNED_TO_EMAIL_LINK[[here]]` to send to the assigned worker</BR>
E-mail: `MODIFIED_BY_EMAIL_LINK[[$$modified_by_worker_name$$]]`</BR>).

Bulletins

Bulletins are broadcast messages created in the **Admin console** for all users logged into the **Worker console** and **My Helpdesk consoles** to view. Bulletins are displayed on the bottom of the console pages and are listed by order of most current to previous.

Bulletins can announce known problems, policies, scheduled upgrades or any other information end-users may need to know. The Bulletin feature is a useful tool, which helps manage the current status of IT resources. For example, if a specific server is down, many users may open the **My Helpdesk console** to report the problem. If a bulletin is published, users can see that the problem is already a known issue, track status and estimated time for resolution. Bulletins cut down the number of redundant work items and requests reported.

Once bulletins have been added, they may be deleted or made inactive. Inactive bulletins are saved but do not display to any workers or queues.

List Bulletins

The screenshot shows the 'List bulletins' screen in the Altitir eXpress Helpdesk. The interface includes a navigation menu on the left with sections like 'Commands' and 'Common tasks'. The main area displays a table of bulletins with columns for Title, Modified by, Modified on, Visible to guests, and Status. Two buttons, 'New' and 'Delete', are circled in red at the top right of the table area.

Title	Modified by	Modified on	Visible to guests	Status
Phone lines	KHennebry	9/20/2002 2:14:15 PM	No	Active
Welcome		9/19/2002 10:05:30 AM	Yes	Active

The **List Bulletin** screen displays a list of all bulletins in the system. End-users can add **New**, **View**, **Edit** and **Delete** bulletin, all from within this screen.

- 1 Click **Admin>Bulletins>List bulletins**.
- 2 Click **View** or **Edit** next to the *bulletin* you want to view or edit.
- 3 Click **New Bulletin** or **Delete** to go to the desired function.

Add New Bulletin

- 1 Click **Admin>Bulletins>New bulletin**.
- 2 Type a description of the bulletin in the **Title** box.
- 3 Type a message in the **Message** box.
- 4 Select the check box if you want the bulletin displayed to users logged in through the **Work item request - Anonymous console**.
- 5 Clear the check box if you **DO NOT** want the bulletin to be **Active**.
- 6 Click **OK** to save.

Delete Bulletin

Title	Modified by	Modified on	Visible to guests	Status
<input checked="" type="checkbox"/> Phone dial out issue	KHennebry	9/17/2002 2:41:33 PM	No	Active
<input type="checkbox"/> 3rd floor printer	JSasser	9/12/2002 8:18:43 AM	No	Active
<input type="checkbox"/> Welcome		9/6/2002 10:44:23 AM	Yes	Active

- 1 Click **Admin>Bulletins>Delete bulletin**.
- 2 Select the check box next to the **Title** name of the bulletin you want to delete.
- 3 Click **Next** to continue.
- 4 The bulletin(s) you selected will appear.

Are you sure you want to delete the following items?

Title	Modified by	Modified on	Visible to guests	Status
Phone dial out issue	KHennebry	9/17/2002 2:41:33 PM	No	Active

A prompt will display the following message:

Are you sure you want to delete the following items?

- 5 Click **Back** to change the selected **Bulletins** to delete.
- 6 Click **Finish** to delete selected Bulletins.

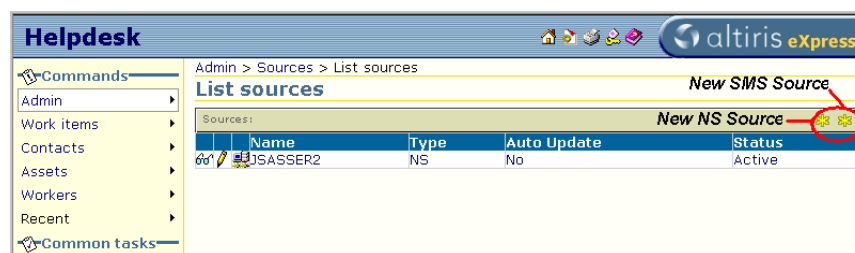
Sources

List Sources

Assets are real devices such as computers, printers, phones, modem jacks or any other items that are identified as unique objects in the database. Assets can be defined manually in the **Worker Console**.

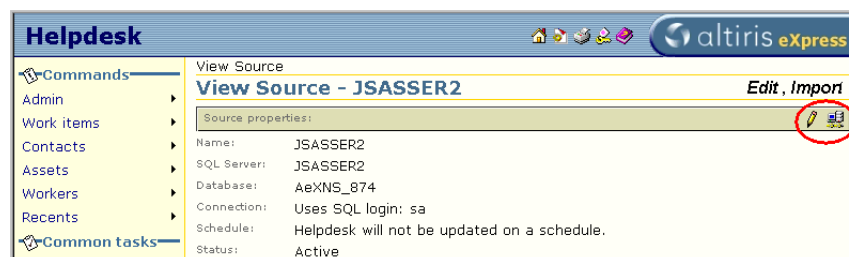
Helpdesk Solution also lets you import assets from the Notification Server and Microsoft SMS databases, you can also register and import from multiple sources. For more information, see the *Altiris eXpress Inventory Solution User Guide* on the product CD or on our web site at <http://www.altiris.com/support/documentation>.

Note You do not have to register your Notification Server computer as a source. Usually, it is auto-registered during Helpdesk Solution setup and the auto-import policy is active by default. The registration process is only necessary if you want to import items from a foreign Notification Server, if the auto-registration process failed or was cancelled, or if you have deleted the auto-registered source.



- 1 Click **Admin>Sources>List source**.
- 2 Click **View** next to the source name to display the source details.
- 3 Click **Edit** next to the source name to modify changes to the source.
- 4 Click **Import** next to the source name to import resources.
- 5 Click **New NS Source** (see diagram above) to add new NS source.
- 6 Click **New SMS Source** (see diagram above) to add new SMS source.

View Source



- 1 Click **Admin>Sources>List source**.
- 2 Click **View** next to the source name to display the source details.
- 3 Click **Edit** to modify source.
- 4 Click **Import** to import data from other resources.

New NS Source

- 1 Click **Admin>Sources>New NS Source**.
- 2 Type the resource **Name** in the box.
- 3 Type the **SQL Server** name in the box.
- 4 Type the **Database** name in the box.
- 5 Clear the check box if you **DO NOT** want to **Use SQL login instead on Helpdesk trusted connection**.
- 6 If you select **Use SQL login**, type a **Login** name in the box.
- 7 Type a **Password** in the box.
- 8 Select the check box to **Update Helpdesk from this source on a schedule**. The schedule is set by the *main* Notification Server even if it is not a source. The default schedule occurs every 30 minutes, only assets whose data has changed is imported during auto-update.
- 9 Clear the check box if you **DO NOT** want the status **Active**.
- 10 Click **OK** to save.

New SMS Source

- 1 Click **Admin>Sources>New SMS Source**.
- 2 Type the resource **Name** in the box.
- 3 Type the **SQL Server** name in the box.
- 4 Type the **Database** name in the box.
- 5 Clear the check box if you **DO NOT** want to **Use SQL login instead on Helpdesk trusted connection**.

- 6 If you select **Use SQL login**, type a **Login** name in the box.
- 7 Type a **Password** in the box.
- 8 Select the check box to do the following:
 - **Update Helpdesk on a schedule** - Imports the data into the Helpdesk database based on a schedule, which is set by the *main* Notification Server even if it is not a source. The default schedule occurs every 30 minutes, only assets whose data has changed is imported during auto-update.
 - **Publish work item changes to this source** - Work item updates to be published in the inventory of the SMS database.
 - **Display links to Web Admin for SMS** - If this is selected, you must also specify the **URL** in the format <http://<server name>/AexWebAdmin>, in the box for **Web Admin for SMS**.

Note If the user is viewing object properties for an asset that has been imported from an SMS source, a link will be displayed that will invoke **Web Admin for SMS** so that the user can use the resource tools (remote control, explore the inventory, or view properties) on the given resource.

Another benefit to using Web Admin for SMS is when you are browsing inventory, **Work item** updates that have been published will be presented as HTML links to Helpdesk Solution. Click on a link to invoke Helpdesk Solution and the work item report will be displayed.
- 9 Clear the check box if you **DO NOT** want the status **Active**.
- 10 Click **OK** to save.

Edit Source

- 1 Click **Admin>Sources>List source**.
- 2 Click **Edit** next to the source name to modify changes to the source.
- 3 Modify the box entries as needed.
- 4 Click **OK** to save.

Import from Source

Importing large numbers of resources can take a considerable amount of time. For imports of thousands of resources use the auto-update feature to avoid time-outs and other problems.

Any number of contacts can be imported though computers are licensed. You can only import as many computers or assets as you have Helpdesk Solution licenses. The software will not allow you to go over your license limit.

- 1 Click **Admin>Sources>List source**.
- 2 Click **Import** next to the source name to import resources.
- 3 Click **Computers** or **Contacts** to search for resource.
 - **Sms Source:** Export computers only.
 - **NS Source:** export both contacts and computers.
- 4 Click **All** or **By name** to search for resource.
- 5 If you selected **By name**, type a resource name to search for in the box. The “%” wildcard character is supported and is supplied automatically at the end if omitted.
- 6 Click **Count**. The **Number of resource matches made** will display below the **Count** button.
- 7 Click **Import matching resources** or **Create a list of matching resources so I can select the ones I want**.
- 8 Click **Next** to continue.

- 9 Click **Import more** to return to the **Import from source** page and import more sources.

Note The import report page may show the **Number of resources processed** is not the same as the number shown by the **Count** operation (step 6), this is not an error. The actual number of resources processed depends on factors not considered during the **Count** operation for performance reasons nor does it include changes that have take place since the **Count** operation was performed.
- 10 Click **Done** when finished.

Configure Helpdesk

The **Configure Helpdesk** page lets you configure the Helpdesk Solution's SQL database.

Note The first time the Helpdesk console is selected as well as completing the **Helpdesk ASP.NET Config wizard**, the page (shown below) will display without the left-hand menu options and there will **NOT** be a **Cancel** button available. You must configure the Helpdesk SQL database successfully before the rest of the features can be accessed.

- 1 Click **Admin>Configure Helpdesk**.
- 2 Type the name of a **SQL Server** in the box.
- 3 Type the name of the **Database** in the box.
- 4 Select the check box to **Use SQL login instead of Helpdesk trusted connection**.
- 5 Type a **User** name in the box.
- 6 Type a **Password** in the box.
- 7 Click **Next** to continue.

- 8 Click **Back** to return to the **Configure Helpdesk** page to edit data entries.
- 9 Click **Update** to refresh the database.

Note If you select **Update** the database is checked by the Helpdesk Solution, there are five outcomes and one error message possible from the database check, they are as follows:

Error condition:

This database was last configured by a later version of Helpdesk. You must either upgrade this version of Helpdesk or choose a different database.

Database version: {0}
Current version: {0}

Option 1: This database was last configured by Alert Manager.

- Press **Update** to update the database.
- Press **Back** to choose another database.

Option 2: This database was last configured by a previous version of Helpdesk.

- Press **Update** to update the database to the current version.
- Press **Back** to choose another database.

Option 3: This database is not a Helpdesk database.

- Press **Update** to update to add Helpdesk to this database.
- Press **Back** to choose another database.

Option 4: Helpdesk will create this database.

- Press **Update** to create this database.
- Press **Back** to choose another database.

Option 5: This database is correctly configured.

- Press **Update** to refresh the database.
- Press **Back** to choose another database.
- Press **Continue** to proceed with this database.

Note Pressing **Update** or **Continue** may display the following page.

The screenshot shows a window titled "Helpdesk" with the "altiris eXpress" logo. The main heading is "Configure Helpdesk". Below that, it says "Configure Notification Server source". There are four input fields: "SQL Server:" with the value "YourNSSQLserver", "Database:" with "AeXNS", "User name:" with "sa", and "Password:" with a masked password. A checkbox labeled "Use SQL login instead of Helpdesk trusted connection." is checked. Below the fields, a message reads: "Press Update to create a source for contact and asset data. Press Continue to skip this step." At the bottom, there are two buttons: "Update" and "Continue".

The page looks and acts like the New NS source command except it offers fewer options. Pressing **Update** will create the NS source, **Continue** will not.

The page is only displayed when no **NS sources** exist in the chosen database. During the initial install, there is usually a source already registered and the **Configure Notification Server source page** will not be displayed.

- 10 Click **Continue**, the **Configure Helpdesk** is complete and the Helpdesk application will restart. All workers connected to Helpdesk will lose their work if they are editing data at the time of the restart. If no errors occur the Admin worker will return to the **Admin report page**.

Delete Work Items

The delete function allows workers to search the Helpdesk database by entering a search criteria, locate work items that are no longer needed in the system, and then delete them - permanently. The search results display in the Item list, where workers select the work items to delete.

Note This is a powerful feature. Deleted work items cannot be recovered except by a database backup.

Simple Tab

The simple search is different than the Advanced search as there are fewer fields used to define the search. If you enter more than one field entry for the search criteria, the result will yield a more precise **Item** list as opposed to searching on one field criteria only.

Note To search for *All* items within a field, click inside the field and then click **Find**. The result will show all work items present in the Helpdesk database, where the search field has been defined with an entry other than null.

Work items > Delete work items

Delete work items

Simple | **Advanced**

Title*: Match all words

Comment*: Match all words

Category: --[any]-- Scope: Exact category Pattern:

Assigned: --[any]-- External ID:

Priority: --[any]-- Status: --[any]-- Type: --[any]--

Find **Reset** *Note: Freetext search is available for the Title and Comment on items modified before 9/6/2002 10:45:28 AM. Use a wildcard search if more recent dates are involved.

#	Title	Assigned	Priority	Status	Category	Modified
<input type="checkbox"/> 1	Move my PC	Level 2 Desk...	Medium	Closed	Change-Move\Desktop	9/12/2002 8:40:...
<input type="checkbox"/> 2	Email doesn	KHennebry	Medium	Open	Not specified	9/30/2002 2:16:...
<input type="checkbox"/> 3	Phone is broke	KHennebry	ASAP	Open	Break-Fix\Phone\No Dial T...	9/27/2002 6:11:...
<input type="checkbox"/> 4	Printer needs drivers	Level 2 Desk...	Low	Open	How to\Install Printer Driv...	9/6/2002 4:48:5...
<input type="checkbox"/> 5	Monitor is fuzzy	Level 2 Desk...	High	Open	Break-Fix\Desktop\Monitor	9/6/2002 4:51:1...

- 1 Click **Work items>Delete work items**.
- 2 Type the search criteria in one or more of the boxes, then click **Find** or click **Reset** to clear the page and start a new **Simple** search.
- 3 Select the check box next to the work item you want to delete.
- 4 Click **Next** to continue.
- 5 The work items you selected will appear.

Work items > Delete work items

Delete work items

Are you sure you want to delete the following items?

#	Title	Assigned	Priority	Status	Category	Modified
<input checked="" type="checkbox"/> 4	Printer needs drivers	Level 2 Desktop	Low	Open	How to\Install Printer Drivers	9/6/2002 4:48:57 ...
<input checked="" type="checkbox"/> 5	Monitor is fuzzy	Level 2 Desktop	High	Open	Break-Fix\Desktop\Monitor	9/6/2002 4:51:19 ...

<< Back Finish Cancel

A prompt will display the following message:

Are you sure you want to delete the following items?

- 6 Click **Back** to change the selected work items to delete.

- 7 Click **Finish** to delete selected work items.

Delete Work Item *Simple* Field Description

Page Items

Item	Description
Title	Type Title of a work item.
Match all words	Select the Title match criteria from the drop-down list.
Comment	Type a Comment word selection.
Match all words	Select the Comment match criteria from the drop-down list.
Category	Select option from the drop-down list.
Scope	Select option from the drop-down list.
Pattern	Type string Pattern to match during the search.
Assigned	Select Assigned worker group from the drop-down list.
External ID	Type an External ID . An External ID is appropriate for organizations managing external customers who need to identify the external customer with a unique ID.
Priority	Select the Priority from the drop-down list.
Status	Select Status from the drop-down list.
Type	Select Type from the drop-down list.
Find	Click to begin search for work item .
Reset	Click to clear the form.
Cancel	Click to abort function.

Advanced Tab

The Advanced search is different than the simple search as the fields used to define the search are greater. If you enter more than one field entry for the search criteria, the result will yield a more precise **Item** list as opposed to searching on one field criteria only.

Note To search for *All* items within a field, click inside the field and then click **Find**. The result will show all work items present in the Helpdesk database, where the search field has been defined with an entry other than null.

Work items > Delete work items

Delete work items

Simple | **Advanced**

Title*: Match all words

Comment*: Match all words

Category: Scope: Exact category Pattern:

Assigned: External ID:

Priority: Status: Type:

Contact: E-mail:

Asset: Asset type:

Modified by: Created by:

Modified before 9/28/2002 ... after

Created before 9/30/2002 ... after

Start before 9/30/2002 ... after

Due before 9/30/2002 ... after

Find **Reset** *Note: Freetext search is available for the Title and Comment on items modified before 9/6/2002 10:45:28 AM. Use a wildcard search if more recent dates are involved.

#	Title	Assigned	Priority	Status	Category	Modified
<input type="checkbox"/> 2	Email doesn't	KHennebry	Medium	Open	Not specified	9/30/2002 2:16:26 PM
<input type="checkbox"/> 7	Windows blue screen	KHennebry	ASAP	Open	Not specified	9/30/2002 11:48:1...
<input type="checkbox"/> 11	Hard drive	Level 1	Medium	Open	Not specified	9/30/2002 11:43:2...
<input type="checkbox"/> 12	Cannot find my program files	Level 1	Medium	Open	Not specified	9/30/2002 11:46:3...
<input type="checkbox"/> 13	Monitor Broken	Level 2 Desktop	High	Requ...	Break-Fix\Desktop\...	9/30/2002 10:32:4...
<input type="checkbox"/> 14	E-mail access denied.	Level 2 Desktop	ASAP	Requ...	How to\Access Email	9/30/2002 10:33:5...

Next >> Cancel

- 1 Click **Work items>Delete work items**.
- 2 Click the **Advanced** tab.
- 3 Type the search criteria in one or more of the boxes, then click **Find** or click **Reset** to clear the page and start an new **Advanced** search.
- 4 Select the check box next to the work item you want to delete.
- 5 Click **Next** to continue.
- 6 The work items you selected will appear.

Work items > Delete work items

Delete work items

Are you sure you want to delete the following items?

#	Title	Assigned	Priority	Status	Category	Modified
<input checked="" type="checkbox"/> 2	Email doesn't	KHennebry	Medium	Open	Not specified	9/30/2002 2:16:26 PM
<input checked="" type="checkbox"/> 13	Monitor Broken	Level 2 Desktop	High	Reques...	Break-Fix\Desktop\Monitor	9/30/2002 10:32:48 AM

<< Back Finish Cancel

A prompt will display the following message:

Are you sure you want to delete the following items?

- 7 Click **Back** to change the selected work items to delete.
- 8 Click **Finish** to delete selected work items.

Delete Work item *Advanced* Field Description

In addition to the Simple search field options, the Advanced search tab offers the following additional search fields.

Page Items

Item	Description
Contact Name	Type the Name of the new contact.
Contact E-mail	Type the E-mail address of the new contact.
Asset	Type a description of the asset.
Asset type	Select the Asset type from the drop-down list.
Modified by	Type a worker name who modified the asset.
Created by	Type a worker name who created the asset
Modified by date range	Type the date range to search, then select either the before or after option.
Created by date range	Type the date range to search, then select either the before or after option.
Start by date range	Type the date range to search, then select either the before or after option.
Due by date range	Type the date range to search, then select either the before or after option.
Find	Click to begin search.
Reset	Click to clear form.

Delete Contacts

The **Delete contacts** page lets you **Find** and **Delete** contacts from the Helpdesk systems database.

Contacts > Delete contacts

Delete contacts

Name: NT ID: E-mail:

Phone: Company: Department:

Organization: --[any]-- Title: Employee ID:

Status: --[any]-- VIP: --[any]--

Find

Name	NT ID	Email	Phone	Company
<input type="checkbox"/> Bob	Bsmith	Bsmith@altiris.com		Altiris
<input type="checkbox"/> Byron Uhrhan	Altiris\buhrhan	buhrhan@altiris.com		
<input type="checkbox"/> Ed Galbraith	altiris\egalbraith2	egalbraith@altiris.com	801.805.1114	Altiris
<input type="checkbox"/> Jared Sasser	ALTIRIS\JSasser	jsasser@altiris.com		
<input type="checkbox"/> Kathi Hennebry	ALTIRIS\khennebry	khennebry@altiris.com	805-1161	
<input type="checkbox"/> Michael Ashton	Altiris\mashnton	mashnton@altiris.com		
<input type="checkbox"/> Rick Gines	Altiris\rgines	rgines@altiris.com	801-555-1212	

Next >> **Cancel**

- 1 Click **Work items>Delete contacts**.
- 2 Type the search criteria in one or more of the boxes, then click **Find**
- 3 Select the check box next to the contact you want to delete.
- 4 Click **Next** to continue.

- The contact items you selected will appear.

Contacts > Delete contacts

Delete contacts

Are you sure you want to delete the following items?

Name	NT ID	Email	Phone	Company
Ed Galbraith	altiris\egalbraith2	egalbraith@altiris.com	801.805.1114	Altiris

<< Back Finish Cancel

A prompt will display the following message:

Are you sure you want to delete the following items?

- Click **Back** to change the selected contacts to delete.
- Click **Finish** to delete selected contacts.

Delete Assets

The **Delete assets** page lets you **Find** and **Delete** assets from the Helpdesk systems database.

Caution Deleted assets are permanently removed.

Assets > Delete assets

Delete assets

Name: Type: External ID:

Location: Manufacturer: Model:

Serial #: Asset tag: IP address:

Status: Organization:

Find

Name	Type	External Id	Serial #	Asset tag
<input type="checkbox"/> DVD Player	Computer			
<input checked="" type="checkbox"/> Monitor	Computer			
<input type="checkbox"/> Network Hub	Network port			
<input type="checkbox"/> PC	Computer		1234	

Next >> Cancel

- Click **Work items>Delete assets**.
- Type the search criteria in one or more of the boxes, then click **Find**
- Select the check box next to the asset you want to delete.
- Click **Next** to continue.
- The asset items you selected will appear.

Name	Type	External Id	Serial #	Asset tag
Monitor	Computer			

A prompt will display the following message:

Are you sure you want to delete the following items?

- 6 Click **Back** to change the selected assets to delete.
- 7 Click **Finish** to delete selected assets.

Workers

List Workers

The List workers screen allows the Administrator to add **New**, **View** or **Edit** workers information.

Name	Full Name	Phone	Cell	E-mail	Queue	Status
Bob Smith	Bob			Bsmith@altiris...	Level 2	Active
buhrhan	Byron Uhrhan			buhrhan@altiri...	[prom...	Active
egalbrai...	Ed Galbraith	801.805.1114		egalbraith@alti...	[prom...	Active
JSasser	Jared Sasser			jsasser@altiris...	[prom...	Active
KHennebry	Kathi Henne...	805-1161		khennebry@alt...	[prom...	Active
mashton	Michael Ash...			mashton@altiri...	[prom...	Active
rgines	Rick Gines	801-555-1212		rgines@altiris...	[prom...	Active

- 1 Click **Workers>List workers**.
- 2 Click **Workers**.
- 3 Click **View** or **Edit** next to the worker name to view or edit.
- 4 Click **New** to add a new worker.

New Worker

New worker are also considered contacts. Adding a new worker requires filling in the form shown below. Here are a few tips to remember when creating a New worker.

- Workers must have an NT ID but do not need an e-mail address although it is strongly recommended. E-mail addresses must be unique among workers but not queues.
- The **Contact** and **Company** information sections of the page are similar to the **New contact** command.
- Workers must also have a unique worker name that is typically shorter than their full name.
- Workers **Hourly rate** is used by reports to estimate work item costs. The rate is not displayed to workers using the **Worker console**.

- The **Retrieve queue** selection denotes what queue the worker will access when they execute the **Retrieve queue item** command. **Prompt**, means the worker will be prompted to select a queue for retrieving work items.
- The **Active** flag controls whether a worker, pending authentication, is allowed to access Helpdesk as a worker. If a worker is de-activated while they are currently using Helpdesk, they do not lose access until they close the internet browser. The **Active** flag for **New worker** is different than the **Active** flag for **Contacts**. Workers can still be active contacts but listed as an inactive worker.

- 1 Click **Workers>New worker**.
- 2 Type the **Worker information** in the box form on the screen.
- 3 Click **OK** to save.

Edit Worker

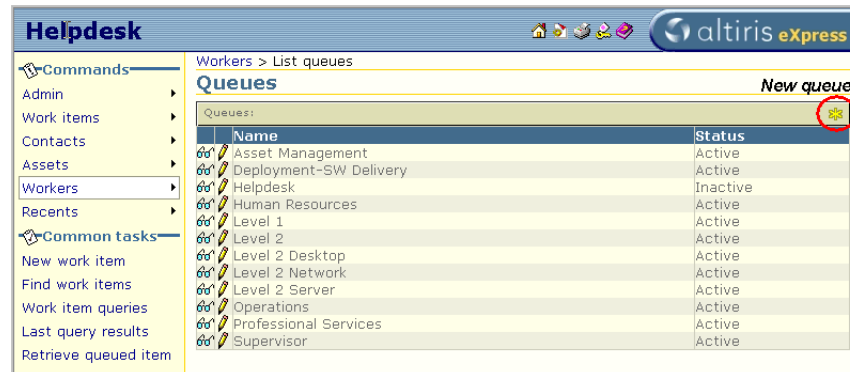
There are two ways to modify worker information, the **Edit** icon is found in the upper right hand corner of the display on both the **View worker page** and the **List worker page**.

- 1 Click **Workers>List workers**.
- 2 Click **View** next to the worker name to display worker information.
- 3 From the **View worker page**, click **Edit** in the upper right hand corner to go to the **Edit worker page**.
- 4 From the **List worker page**, click **Edit** next to the worker name to modify.
- 5 Click **OK** to save.

List Queue

Queues are Helpdesk objects similar to workers that work items can be assigned to. Queues do not correspond to a specific worker. A queue cannot have an NT ID associated with it but it can have an e-mail address so that notification e-mails can be sent to the person or group responsible for work items assigned to the queue. Unlike workers, the e-mail address for queue can be several SMTP addresses separated by a semicolon. A queue cannot create or update a work item, a contact, or asset (except through a Notification Server policy or other third-party contrivance).

Inactive queues do not show up in the drop-down list of workers or queues; however, work items assigned to a queue when it was inactivated are still assigned to it and workers who have that queue selected to retrieve from will still pull work items from the inactive queue until the queue is empty.



- 1 Click **Workers > List queues**.
- 2 Click **View** next to the queue to view details.
- 3 Click **Edit** next to the queue to edit.
- 4 Click **New queue** to add a new queue.

View Queue

View queue - Operations

Queue properties:

Queue Name: Operations
 Hourly rate: 0
 Status: Active

Contact information:

E-mail: _____ Pager e-mail: _____ Phone: _____
 Cell phone: _____ Pager: _____ Location: _____
 Company: _____ Department: _____ Organization: _____
 Comment: _____

- 1 Click **Workers>List queue**.
- 2 Click **View** next to the queue to view.
- 3 Click the **Internet Browser Back** button to return to the previous screen.

Edit Queue

The screenshot shows the 'Edit queue' form for a queue named 'Level 2 Desktop'. The form includes the following fields and options:

- Queue Name:** Text box containing 'Level 2 Desktop'.
- Hourly rate:** Text box containing '0'.
- Active:** A checked checkbox.
- Contact information:**
 - E-mail:** Text box.
 - Pager e-mail:** Text box.
 - Phone:** Text box.
 - Cell phone:** Text box.
 - Pager:** Text box.
 - Location:** Text box.
 - Company:** Text box.
 - Department:** Text box.
 - Organization:** A dropdown menu currently showing '--[none]--'.
- Comment:** A large text area.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom.

- 1 Click **Workers** > **List queue**.
- 2 Click **Edit** next to the queue to edit.
- 3 Edit the box form on the page.
- 4 Click **OK** to save.

New Queue

The screenshot shows the 'New queue' form. The form includes the following fields and options:

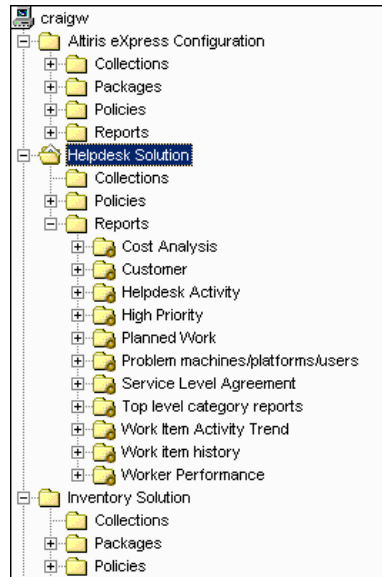
- Queue Name:** Text box.
- Hourly rate:** Text box containing '0'.
- Active:** A checked checkbox.
- Contact information:**
 - E-mail:** Text box.
 - Pager e-mail:** Text box.
 - Phone:** Text box.
 - Cell phone:** Text box.
 - Pager:** Text box.
 - Location:** Text box.
 - Company:** Text box.
 - Department:** Text box.
 - Organization:** A dropdown menu currently showing '--[none]--'.
- Comment:** A large text area.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom.

- 1 Click **Workers** > **New queue**.
- 2 Type the information in the text boxes provided.
- 3 Click **OK** to save.

Reports

Helpdesk Solution provides reports including service level agreements, work items by platform, worker performance, work item schedule, history, total cost of ownership (TCO) and others. Report customization is available to administrators who need additional reports.

The Helpdesk Solution reports can be accessed through the Notification Server Web Administrator by clicking **Start > Programs > Altiris > Altiris eXpress > Notification Server > Web Administration Console**, then in the left pane selecting **Helpdesk Solution > Reports**.



For cost reports, the amount of time and the worker's hourly rate are used to compute the cost associated with the work item. When combined with the inventory data (organization, location, platform, components, etc.) it is possible to produce TCO reports.

For specific assets, Helpdesk Solution provides instant access to Helpdesk Solution and SMS information. Helpdesk Solution supports three views: table; graph; and pivot, and provides the ability to drill down into the view and ultimately navigate with context to the Helpdesk Solution console. Helpdesk Solution supports scheduling as well as custom report views. The latter is used to provide select reports to managers and specific workgroups.

Unless otherwise specified, the reports take the last "N" days or a start date and end date as parameters.

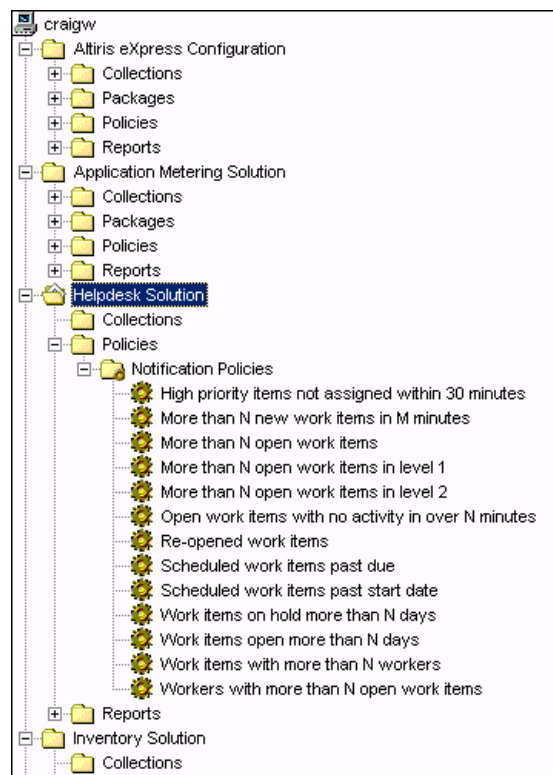
Notification Policies

Notification Policies automate the monitoring of work item activity. Writing a new Notification Policy is as easy as writing a SQL query that evaluates to true. Notification Policies support the following notification methods:

- E-mail
- Launch (invoke application)
- SNMP (Trap)
- Generate Report (and e-mail the URL)
- Helpdesk Solution Work Item creation.

The Helpdesk Solution Notification Policies can be accessed through the Notification Server Web Administrator by clicking **Start > Programs > Altiris > Altiris eXpress > Notification Server > Web Administration Console**, then in the left pane selecting **Helpdesk Solution > Policies > Notification Policies**.

The following Notification Policies are provided in Helpdesk Solution:



Note In order to display images in Helpdesk Solution notification e-mail, make sure that **Show pictures** is selected in **Internet Options > Advanced > Multimedia**.

For more information on Notification Policies, see the Notification Policies section of the *Altiris eXpress Notification Server User Guide* on the product CD or on our web site at <http://www.altiris.com/support/documentation>.

Service Level Agreements

Service level agreements (SLAs) are a set of standards established to gauge the performance of machines, work items, etc. Helpdesk Solution provides reports that provide data regarding your SLAs. These reports, combined with Helpdesk Solution Notification Policies, provide a powerful tool for managing your SLAs.

The Helpdesk Solution SLA reports can be accessed through the Notification Server Web Administrator by clicking **Start > Programs > Altiris > Altiris eXpress > Notification Server > Web Administration Console**, then in the left pane selecting **Helpdesk Solution > Reports > Service Level Agreement**.

Helpdesk Solution provides these SLA reports:

- 1 Work items not completed within the SLA
- 2 Work items that are past due (not closed)
- 3 Average time to close work items by category
- 4 Average time to process a work item

Chapter 8:

Troubleshooting

Log Files

Components that encounter errors while running place messages in a log file in the \Altiris\Express\logs folder on the Notification Server computer. The log is an XML text file that you can open in a text editor or within Internet Explorer 5.

Index

- A**
 - accessing Helpdesk Solution through a custom URL 93
 - administration
 - bulletins 122
 - sources 124
 - workers 135
 - Altiris
 - support 7
 - assistance 7
- B**
 - bulletins
 - administration 122
- C**
 - comments
 - search in 69
 - console
 - administrator 22
 - end user 23
 - worker 22
 - consoles 21, 22
 - contact information 7
 - contacts 24
 - conventions for document 6
 - copyright 2
 - creation date of document 2
 - cross references 6
 - custom
 - queries 72
 - URL 93
 - customer support 7
- D**
 - document
 - conventions 6
 - print date 2
- E**
 - email message template macros 120
 - external documents 6
- F**
 - Find 66
 - full-text search 69
- G**
 - getting help 7
- H**
 - Heading
 - First 9
 - Second 9
 - Helpdesk Configuration Wizard
 - installation 19, 29
 - using to modify configuration 31
 - history
 - work item 93
- I**
 - import data wizard 127
 - installation 28
 - setup 28
- L**
 - legal notice 2
 - licensing 43
 - links 6
 - log file 142
- M**
 - macros
 - email message template 120
- N**
 - notice 2
 - notification policies 140
 - Notification Server 21
- P**
 - patent 2
 - Pocket PC 94
 - prerequisites 27
 - product version 2
- Q**
 - queries
 - custom 72
- R**
 - register sources for assets 124
 - reports 139
- S**
 - search
 - full-text 69
 - wildcard 70
 - search in comments 69
 - security 36
 - end users 38
 - permissions 39
 - web permissions 39
 - workers 37
 - server 12, 27
 - Service Level Agreements 141
 - SMS 9
 - integration 26
 - sources
 - administration 124
 - register for assets 124
 - support 7
 - contact information 7
- T**
 - technical support 7
 - The 49
 - trademark 2
- U**
 - uninstalling 32
 - upgrading 32
 - URL
 - accessing Helpdesk Solution through a custom 93
 - Using 70
- V**
 - version 2
 - virtual workgroups 23
 - level 1 23
 - level 2 23
 - supervisor 24
- W**
 - web reports 21
 - wildcard search 70
 - wizard
 - Helpdesk Configuration 19, 29
 - import data 127
 - work item 25
 - work item history 93
 - work items
 - queries 70
 - retrieve 80, 130
 - worker console 46
 - Pocket PC support 94
 - workers 23
 - administration 135
 - security 37