Web Help Desk

Version 12.6
GETTING STARTED GUIDE: WEB HELP DESK

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# Introduction

This guide picks up right after the Web Help Desk (WHD) installation process and walks you through the initial steps you need to start using the application in your organization.

> If you need to install Web Help Desk, start with the Web Help Desk [Installation Guide](#).

If you are a **new user**, this guide applies to you and is the best place to start with Web Help Desk.

If you are an **existing user**, you will find more advanced information in the Web Help Desk [Administrator Guide](#). If you need instructions on how to upgrade, see the Web Help Desk [Upgrade Guide](#).

## How to get started

1. **Create client accounts.** [Log in](#) to the Web Help Desk Administrator Console and [create client accounts](#) for each Web Help Desk user who submit tickets and techs who submit cases.

2. **Create tech accounts and define tech permissions.** [Create a tech account](#) for each tech who creates and resolves tickets. When you are finished, [define the tech permissions](#) that determine the actions each tech can perform in the application.

3. **Create tech groups and request types.** If you are managing a large organization, [plan](#) and [create](#) tech groups and request types to determine how tickets are routed through Web Help Desk and assigned to techs.

4. **Configure the ticket options.** [Define the rules](#) that apply to all tickets. If required, [create custom fields](#) to track additional ticket information.

5. **Configure incoming and outgoing e-mail accounts.** Configure separate [incoming](#) and [outgoing](#) email accounts to collect incoming mail for IT tickets and deliver outgoing mail. If you created the [email accounts](#) in the Configuration Wizard during the initial setup, you can verify your account information.

6. **Set up ticket creation by email.** Configure Web Help Desk so you can [submit your tickets through email](#).

7. **Track your corporate assets.** [Set up asset management](#) to track the deployment, use, and maintenance of your corporate assets (such as servers, laptops, and monitors). Begin with [creating your locations](#). You can also discover assets using the [Discovery Engine (WMI)](#) or [LANsweeper](#), or configure Web Help Desk to discover assets [stored in NPM, SAM, or NCM](#).

8. **Configure the ticket types.** Configure Web Help Desk tickets as [service request or incident tickets](#). When you are finished, you can [link incident tickets to a problem ticket](#) and [manage problem and incident tickets](#).

9. **Start using Web Help Desk.** [Get started with Web Help Desk](#) as a tech. Learn how to [create tickets](#), [view and customize the ticket queue](#), [search for a ticket](#), and [update and resolve tickets](#). You can also create training materials for your Web Help Desk clients using a [client training template](#).

10. **Beyond getting started.** Get access to [additional resources](#) that will help you move beyond getting started.
Log in to the console

After you complete the Configuration Wizard, the Web Help Desk Administrator Console displays on your screen. If you logged out, open a web browser and navigate to http://hostnameOrIPAddress:port where:

- hostnameOrIPAddress is the hostname or IP address of the server where WHD is installed.
- port is the WHD Admin Console port defined for the website. You can configure this port during the installation. The secure default port is 8443.

In the login screen, you will see the following:

![Login Screen](image)

To get started, log in using the username and password you created for the admin account. Later, you can update the Admin account password and create other users and groups, with their own views and permissions.
Create client accounts

Clients are authorized Web Help Desk users who submit tickets. A client account must be created for each client.

You can create client accounts by importing the client information or manually entering the information in the Web Help Desk Admin Console.

- **Import client information from an Active Directory (AD) or LDAP server.**
  If you can define a connection to the company's AD or LDAP directory, Web Help Desk can quickly create client accounts based on user records. See Import clients from Active Directory for information about defining a connection, mapping attributes, and importing information.

- **Import client information from a file.**
  You can import client information from a file in TSV (tab-separated values), CSV (comma-separated values), or Excel format. See the Web Help Desk Administrator Guide for details.

- **Manually enter client information.**
  If you cannot import client information from a server or file, you can manually create client accounts. For example, an import might not be possible because the AD or LDAP server is external to your network. Or an import might not be necessary because only a small number of users require Web Help Desk client accounts.

Define client options

Client options are general settings that affect all clients who log in to Web Help Desk. Review these options and update them as needed.

1. In the toolbar, click Setup and select Clients > Options.
2. If you want to allow clients to create accounts from the client interface, change the Client Can Create Account setting.
   - **Client Can Create Account**
     - No
     - Yes
     - Only if client's e-mail matches an Accepted Domain

   **Accepted Domains**
   - mycompany.com
   - Example: mycompany1.com, mycompany2.com

3. If you want to email login information to new clients, select E-Mail Client When Account Is Created.

4. Review and update other settings as needed. See the tooltips for information about each option.
5. Click Save.
Manually create a client account

If client information is not in a format that can be easily imported, you can manually create each client account. The account information must include the client's name, email, and Web Help Desk login credentials, as shown in the example below. When you add a new client, the information is saved in the Web Help Desk database.

1. In the toolbar, click Clients.
2. Click New Client.
3. Enter the client's name, credentials, and contact information.
   - Required fields are bold.
   - Active Account: [Yes]
   - First Name: Sylvia
   - Last Name: Kearns
   - E-Mail: earns@mycompany.com
   - Secondary E-Mail: 
   - User Name: skearns
   - Password: [Random]

4. Update other options as needed. See the tooltips for more information.
5. Click Save.
   - If you selected the client option E-mail Client When Account is Created, Web Help Desk sends a confirmation email to the client.

Add a client custom field

You can add custom fields to the Client Info tab to track additional client information. Custom fields can be used to track any client information that is relevant to your support organization.

For example, if your company deals with sensitive data, you can add a custom field to track the client's security level. The security level might determine whether a client is granted access to certain network locations. Or, you can track whether the client is a contractor or a direct employee because certain services are available only to direct employees.

Information can be manually entered into a custom field, or it can be imported. If the information is stored on an Active Directory (AD) or LDAP server, you can map the custom field to the AD or LDAP schema and import this value along with other client information.

This example adds a custom field called Contractor. The field has two radio buttons labeled Yes and No.
1. Click Setup.
2. Select Clients > Client Custom Fields.
3. Click New.
   
   The Client Custom Fields screen displays the default values for a new custom field.
4. Enter a Label to identify this field.
5. On the Display Order drop-down menu, select this field's position within the Custom Fields section of a ticket.
6. In the Clients and Techs sections, specify whether each group can see or edit the custom field.
7. Techs with admin accounts can edit all custom fields.
8. Select the Type of input this field will accept.
   
   The remaining fields change based on the Type you select.
9. Complete the remaining fields. Point to any field name to display information.
10. Click Save.

**Import clients from Active Directory**

To streamline the client setup process and reduce input errors, you can import client information from one or more Microsoft® Active Directory® (AD) or LDAP servers. Web Help Desk automatically creates client accounts based on this information, and then updates the client accounts when the information changes.

- If you import data from an AD or LDAP server, the client login credentials are evaluated by AD or LDAP, not by Web Help Desk. When a client attempts to log in, Web Help Desk sends the credentials to the AD or LDAP server for authentication.

**Determine whether to import all records or individual records**

Web Help Desk periodically performs a one-way synchronization with the AD or LDAP server. You can choose to synchronize individual records as needed (individual synchronization) or to synchronize all records at once (bulk synchronization).
Individual synchronization

Individual synchronization creates and updates client account information as needed, which reduces processing time. Web Help Desk creates each client account the first time a user logs in to the website or submits a ticket through email. The client account is updated whenever the client logs in again or submits another ticket.

Individual synchronization is used unless you choose to enable bulk synchronization.

Bulk synchronization

Bulk synchronization creates a client account for every user record in the AD or LDAP directory. Each time bulk synchronization runs, Web Help Desk examines each user record to determine if a corresponding client account needs to be added or updated. If your organization includes a large number of users, bulk synchronization can affect Web Help Desk performance.

If enabled, bulk synchronization runs at regular intervals based on the schedule that you specify in the connection definition. You can also run it manually by clicking the Sync Now button in the LDAP connection list.

Even if you use bulk synchronization, Web Help Desk still performs an individual synchronization each time a client logs in or sends an email. This keeps active client accounts up-to-date, even if bulk synchronization is not performed frequently.

Most organizations do not need to perform bulk synchronization. However, bulk synchronization can be useful if you need to create all client accounts so that you can make configuration changes before clients log in.

If most of the users in your AD or LDAP directory are not using Web Help Desk, SolarWinds does not recommend using bulk synchronization.

Define a connection

To enable the client account data import, define a connection to each AD or LDAP server.

The connection definition:

- Provides information that enables Web Help Desk to connect to the server
- Enables and schedules bulk synchronization (optional)
- Maps attributes in the AD or LDAP schema to the corresponding fields in the Web Help Desk client account

This example provides connection information for an LDAP server, and maps the custom Contractor field to an attribute in the LDAP schema.

Complete this procedure with an experienced AD or LDAP administrator who is familiar with your existing structure. This person must have administrative access to the AD or LDAP server.
1. Click Setup.
2. Select Clients > AD / LDAP Connections.
3. To create a new connection, click New.
   To update an existing connection, click the connection name to open it, and then click to edit.
4. In the Connection Basics tab, select Enabled to enable the connection.
5. Enter the required connection information. See the tooltips for more information.

![Connection Basics Tab](image)

6. Maximize the Advanced window and review or update the advanced settings.
7. If you want to use bulk synchronization, select Enabled and then specify when the synchronization should occur.
   
   To avoid affecting network performance, schedule the synchronization for a time when the network is least busy.

8. Click Save.
9. Click Test Settings to test your settings, and make adjustments if needed.
10. Map client account fields to attributes in the schema.
    a. Click the Attribute Mappings tab.
    b. Specify the AD or LDAP schema being used.
    c. Locate each client account field that will be populated with information from the AD or LDAP server. To map each field, enter the associated schema element as instructed by the AD or LDAP administrator.

```
Contractor isContractor
```

The client's last name, user name, and email must be mapped. If you are using the default schema, these fields are mapped automatically. For custom schemas, you must map these attributes manually.

Any field, including custom fields, can be mapped if the data is available in the schema.

11. Click Save.

Techs are users who resolve Web Help Desk tickets. Permissions specify which tickets a tech can access and what actions the tech can perform.
A tech's permissions are determined by the type of tech account and the set of permissions granted to the account.

**Tech account types**

Web Help Desk provides two account types for techs: Admin and Tech.

Admin accounts provide unlimited access to all Web Help Desk functionality. All permissions are granted to admins. Tech accounts provide limited access to Web Help Desk functionality based on the tech's permissions.

**Tech permissions**

A named set of permissions is granted to each non-admin tech account. Web Help Desk provides a default set of tech permissions. You can edit the default permissions to meet your organization's needs.

You can also define other permission sets for specific roles within your organization. For example, you can define a permission set for senior techs to give them additional access (but not the unlimited access of an admin). Another permission set can be assigned to junior techs to restrict their access.

**Create a tech account**

Check out this video (9:16) on creating tech accounts and email accounts.

Each tech who logs in to Web Help Desk must have a tech account. This example describes how to create a tech account for Richard Acevedo. He will be granted the default tech permissions. A tech account for his supervisor (Sara Peterson) already exists.

Beginning in Web Help Desk 12.5.2, all techs who use LDAP authentication must have a Client account to access their Tech account. This process prevents unauthorized access to an LDAP account.

When you create a non-admin tech account, specify the tech's supervisor. As a result, SolarWinds recommends creating the supervisors' accounts first.

1. In the toolbar, click Setup.
2. Click Techs > Techs.
3. Click New.
4. Enter the tech's name, Web Help Desk credentials, and contact information. All bold fields are required.

For more information about any field, see the tooltips.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Richard</td>
</tr>
<tr>
<td>Last Name</td>
<td>Acevedo</td>
</tr>
</tbody>
</table>
4. Specify the account type. For tech accounts, specify the tech’s permissions and supervisor.

![Account Type Table]

A supervisor is required for tech accounts, but optional for admin accounts.

5. To enable the tech to access the Web Help Desk client interface, link the tech to a client account.

![Linked Client Demo Client]

When the tech account is linked to a client account, the Switch to Client Account icon is available in the upper-right corner. The tech can click this button to display the interface exactly as the selected client sees it.

![Tech Account Info]

Tech accounts can be linked to actual client accounts or a demo client account. If you link to a demo client account with the same user name as the tech, a message warns you that the client won’t be able to log in except as a tech linked to the client account. Because that is the intent, you can ignore the message.

6. Enable user interface enhancements to support the latest web browsers (if desired). Click the tooltip for details.

7. Specify the number of notes and history entries to display on a ticket. Additional entries will be collapsed by default.

8. In the Asset Setup section, select the technologies that this tech can use to connect remotely to an asset.

![Assets Options]

The Assets > Options configuration determines which technologies this section lists.

9. In the E-Mail Setup section, specify the email settings and select the events that generate an email to this tech.
10. To prevent Web Help Desk from escalating a ticket to this tech when the tech is not scheduled to work, enter the Scheduling Setup settings.
   a. Specify the tech’s business zone.
   b. If the tech’s work schedule is different than the default work schedule for that zone, specify the work schedule.
   c. Indicate if the tech is on vacation.
   d. Optionally, select a backup tech to receive this tech’s escalated tickets.
   e. Indicate whether the account is active.

<table>
<thead>
<tr>
<th>Business Zone</th>
<th>US/Austin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specify Work Schedule</td>
<td>✔️</td>
</tr>
<tr>
<td>Work Schedule</td>
<td>M Tu W Th F Sa</td>
</tr>
<tr>
<td>Start Time</td>
<td>3:00 am</td>
</tr>
<tr>
<td>End Time</td>
<td>11:00 am</td>
</tr>
<tr>
<td>On Vacation</td>
<td>✔️</td>
</tr>
<tr>
<td>Backup Tech</td>
<td>Strauss, Lynette</td>
</tr>
<tr>
<td>Assign Tickets to Backup Tech When</td>
<td>Not Scheduled ✔️ On Vacation ✔️</td>
</tr>
<tr>
<td>Active Account</td>
<td>✔️</td>
</tr>
</tbody>
</table>

11. Click Save.

Define tech permissions

⚠️ Check out this video (6:23) on defining tech permissions.

Permissions determine which tickets techs can access and which actions they can perform. This example creates a new permission set called Senior Tech. Techs with this permission set can edit the Due Date and Request Detail fields on a ticket. They can also edit approved FAQs and approve new FAQs.

If your organization is implementing knowledge centered support, consider including the Approved FAQ Edit permission in the Default tech permission set. Granting this permission allows techs to update or correct FAQs as needed.

Create a new tech permission set

1. Click Setup and select Techs > Tech Permissions.
2. Click New.
3. In the Permissions tab, enter a name to identify the permission.
4. In Location Permissions, specify whether ticket access is restricted based on the company, location group, department group, or tech group a tech is assigned to. The tooltips provide more information about each permission.

5. In Ticket Permissions, define what actions a tech can perform within a ticket.

<table>
<thead>
<tr>
<th>Action</th>
<th>Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date Edit</td>
<td>✓</td>
</tr>
<tr>
<td>Request Detail Edit</td>
<td>✓</td>
</tr>
</tbody>
</table>

6. In Client Permissions, specify whether a tech can edit, delete, import, or download clients.

7. In Asset Permissions, specify whether a tech can view and edit assets and associated elements.

8. In Other Permissions, define the options that enable techs to edit locations, manage parts, edit and import FAQs, work with reports and surveys, view hourly billing rates, and create and edit new and existing FAQs for all categories.

<table>
<thead>
<tr>
<th>Action</th>
<th>Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>FAQ Edit</td>
<td>✓</td>
</tr>
<tr>
<td>Approved FAQ Edit</td>
<td>✓</td>
</tr>
<tr>
<td>Approve FAQs</td>
<td>✓</td>
</tr>
<tr>
<td>Import FAQs</td>
<td>✓</td>
</tr>
<tr>
<td>FAQs 'All' Category Edit</td>
<td>✓</td>
</tr>
</tbody>
</table>

9. Click Save.

Assign techs to a tech permission set

After defining the permissions, assign techs to the permission set. Each tech can be assigned to only one permission set. When you assign a tech to a new permission set, the tech is automatically removed from the previous permission set. In the following example, assigning Richard Acevedo to the Senior Tech permission set automatically removes him from the Default permission set.

1. From the tech permissions page, click the Assigned Techs tab.
2. Select the techs who will have these permissions.

   | Richard Acevedo |

3. Click Save.
Create tech groups and request types

Check out this video (3:01) on tech groups, request types, and ticket assignment.

Request types and tech groups work together to determine how tickets are routed through Web Help Desk and assigned to techs.

Request types

Web Help Desk uses request types to categorize and route help desk tickets. They define the basic structure of your help desk system. Users cannot submit a ticket without a defined request type.

Request types are used to:

- Route tickets to the appropriate tech group or lead tech
- Specify which custom fields a ticket includes
- Initiate an approval process, if needed
- Facilitate reporting
- Configure workflows and action rules
- Display related FAQs to clients

Web Help Desk provides several default request types, but you can define a set of request types that meet your organization's needs.

Tech groups

You can define groups of techs with similar skills and technical expertise, and then map these groups to the request types they will service. A tech group can include multiple levels, so that complex or difficult tickets can be escalated to more experienced techs.

Tech groups are optional. Small organizations with just a few techs probably don't need to define tech groups. Without tech groups, each ticket is assigned to the lead tech for the ticket's request type.

Larger organizations can use tech groups to automatically route tickets to techs with the required skill set. Web Help Desk can assign tickets to group members using a load-balancing or round-robin algorithm, or you can route all tickets to the group manager or lead tech for manual assignment.

Ticket assignment logic

The following diagram shows the logic that Web Help Desk uses to assigns tickets.
Plan your tech groups and request types

As you plan request types for your organization, consider the following guidelines:

- Hide internal request types from clients to avoid confusion.
  Some request types are used only by techs (for example, a request for a system to be shut down for maintenance).
- Create client-facing request types that reflect the client's (and not the tech's) point of view.
  Name request types to reflect the problem or symptoms the client sees, not the solution or the underlying technical cause. Be sure to avoid specialized terms that clients would not know.
- Use nested request types to subdivide broad parent categories.
  Request types can have multiple levels. Nested request types can be used to:
    - Provide more specific categories for reporting or categorizing FAQs.
    - Route tickets to different tech groups. For example, Facilities > Plumbing and Facilities > Landscaping could be routed to different tech groups.
    - Hide technical subcategories from clients. For example, a parent request type called Computer Problem could have nested request types to describe specific types of problems (such as VPN Connection Issue). These nested types are hidden from clients to avoid confusion. Techs can use them to provide more accurate reporting on the types of issues users encounter.
- Do not make your system too complicated or granular. Create only the types you need to route and categorize requests.
  Users can have difficulty selecting a type when there are too many options, and choose a generic type such as Other. If in doubt, start with fewer types and add more if needed.
- Before deploying the request types and tech groups in a production environment, test all request types in a QA or development environment. Verify that each request type is routed to the correct group.

Map request types to tech groups

Create a list of your organization's request types, and map them to the tech groups who can support them. The following table provides an example of groups mapped to request types.

<table>
<thead>
<tr>
<th>TECH GROUP</th>
<th>REQUEST TYPES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building Maintenance</td>
<td>• Facilities &gt; General</td>
</tr>
<tr>
<td></td>
<td>• Facilities &gt; Installation</td>
</tr>
<tr>
<td></td>
<td>• Facilities &gt; Clean Up</td>
</tr>
<tr>
<td></td>
<td>• Facilities &gt; Fixture / Office / Cubicle Repair</td>
</tr>
<tr>
<td></td>
<td>• Facilities &gt; Heating or Cooling Issue</td>
</tr>
<tr>
<td></td>
<td>• Facilities &gt; Light Bulb Replacement</td>
</tr>
<tr>
<td></td>
<td>• Facilities &gt; Plumbing Issue</td>
</tr>
</tbody>
</table>
Define a request type

Check out this video (5:11) on setting up request types.

Request types categorize Web Help Desk tickets. The request type specifies which users can create a specific type of ticket and what fields are included on the ticket.

The following example defines the New Hire Paperwork request type. It is a subtype of the HR request type. This request type will be used to initiate the paperwork that the Human Resources department must complete when a new employee starts. Because tech groups have not been defined yet, this request type will be mapped to a tech group later.

For more information about any field, see the tooltips.

1. In the toolbar, click Setup and select Tickets > Request Types. The Request Types window displays current request types.
2. Click New.
3. Enter a name to identify this request type.
   \[ \text{Request Type} \times \text{New Hire Paperwork} \]
4. To create a nested request type, select the parent type. Optionally, click \( \text{copy} \) to copy values for the remaining fields from the parent type.
   To create a top-level request type, leave this field blank.
   \[ \text{Parent Type} \times \text{HR} \]
5. Select the tech group that will handle this type of request.
   If the tech group is not defined, leave this field blank. You can map the request type to a tech group when you define the tech group.
   \[ \text{Tech Group} \times \]
6. Specify the default priority and whether fields are hidden or required.

<table>
<thead>
<tr>
<th>Default Priority</th>
<th>Medium ▼</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hide Subject</td>
<td>□</td>
</tr>
<tr>
<td>Hide Request Detail</td>
<td>□</td>
</tr>
<tr>
<td>Request Detail Required</td>
<td>✓</td>
</tr>
</tbody>
</table>

7. In the Detailed Instructions field, enter additional information to be displayed on the ticket. For example, you can provide specific instructions for creating this type of ticket, or explain the request type’s purpose so a client can choose the correct type.

You can apply BBCode formatting to format lists, add emphasis, or include links to supporting information. See the Web Help Desk Administrators Guide for details.

| Detailed Instructions | [list] [*] Put the name of the new employee in the Subject field. [*] Put the hiring manager and department in the Request Detail field. |

8. Specify whether this type of ticket is listed in the menu displayed to clients. Clear this option for types that are selected only by techs (for example, a request type used by techs to schedule an equipment maintenance window).

In this example, the New Employee request type should be visible to clients.

| Visible to Clients | ✓ |

9. Optionally, restrict this ticket type to specific companies, locations, or departments. Only clients or techs associated with your selections will see this request type. For example, if the request type will be routed to a facilities maintenance group for a specific location, restrict the type to that location.

In this example, the New Hire Paperwork request type is not restricted to specific companies, locations, or departments.

| Companies | □ All □ Specific |
| Locations | □ All □ Specific □ Location Group |
| Departments | □ All □ Specific |

10. Identify the tech who will receive the highest level escalation (after the tech group manager).

11. Select the survey that is sent to clients when this type of ticket is closed, or select None to disable surveys for this ticket type.

| Survey | None ▼ |

12. Click Save.
Define a tech group

Tech groups specify which techs are included in the group, the number of levels within the group, how tickets are assigned, and which request types the group can support.

The following example creates the Human Resources group and maps it to HR request types. This group includes only one level, and tickets are assigned to individual techs using a load-balancing algorithm.

Create a tech group

1. In the toolbar, click Setup and select Techs > Tech Groups.
2. Click New.
   The Tech Group Info page opens.
3. Enter a name to identify the tech group.

<table>
<thead>
<tr>
<th>Group Name</th>
<th>Human Resources</th>
</tr>
</thead>
</table>

4. Select the group's manager.

   | Group Manager | Peterson, Sara |

5. If tickets should be assigned to the manager of the location group associated with the ticket (instead of the tech group manager), select When a Ticket's Location.

   | When a Ticket's Location belongs to a Location Group, give precedence to the Location Group Manager |

   - Tickets are assigned to a group manager when auto-assignment is not enabled on the Tech Group Levels tab, or when auto-assignment is enabled but no techs in the group are available.

6. Click Save.

Configure tech group levels

Group level options specify how tickets are assigned and which techs are members of that level. At least one level must be configured for each group. Add multiple levels if you want to be able to escalate tickets to more experienced techs.

- If you configure multiple levels, all new tickets are initially assigned to techs in Level 1. Techs in higher levels receive tickets only if they are escalated.
1. Click the Tech Group Levels tab.

2. Click an existing level to open it, or click Add Level to add a new level.

3. Specify how Web Help Desk will assign tickets for this level.
   a. Select the type of tech Web Help Desk will assign tickets to.
      - None: Tickets are not automatically assigned to individuals, but belong to the group level.
      - A Level Tech: Each ticket is assigned to a tech in this level based on the tech's availability.
      - Group Manager or Lead Tech: All tickets are assigned to the manager or lead tech, who then reassign them to techs.
   b. If you selected A Level Tech, select the assignment algorithm.
      - Load Balancing: Assigns each ticket to the tech with the smallest backlog (the lowest number of assigned tickets).
      - Round Robin: Assigns tickets sequentially to all techs in the level, regardless of the tech's current backlog.

4. In the Force E-Mail Notification To row, select who receives email notifications when a ticket is created or updated by the REST API or a SolarWinds alert, or updated by a client. These notifications are sent regardless of the email options selected for each tech account.

5. In the Default Selected E-Mail Recipients row, specify who is selected by default to receive an email when a tech clicks Save and E-Mail in a customer ticket.

6. Select the techs assigned to this level.

7. Click Save.
Assign supported request types

1. Click the Request Types Supported tab to display the request types assigned to this tech group.
2. Click Edit to display all request types not assigned to any tech group.
3. Select one or more Request Types for this group to receive, and click Save.

- HR • Benefits
- HR • Employee Complaint
- HR • New Employee
- HR • Personal Records
Configure ticket options

This section describes how to set up your ticket options, status types, and custom fields for your deployment.

Ticket options define the rules that apply to all tickets. Review the default settings and update them if needed.

In this example, clients can submit tickets only through the web interface. Additional configuration will be performed later to enable email submission.

1. In the toolbar, click Setup.
2. Select Tickets > Options.
3. On the Tickets Options page, review and update settings in the General Options section.

<table>
<thead>
<tr>
<th>Use Subject Field</th>
<th>✓</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Priority</td>
<td>Medium</td>
</tr>
<tr>
<td>Lookup Clients By</td>
<td>○ Last Name  ○ E-Mail</td>
</tr>
<tr>
<td>Attachments Enabled</td>
<td>✓</td>
</tr>
<tr>
<td>Room Required</td>
<td>☐</td>
</tr>
<tr>
<td>Room Field Style</td>
<td>○ Popup Menu  ○ Text Field</td>
</tr>
<tr>
<td>Enter Work Time As</td>
<td>○ Minutes  ○ Points</td>
</tr>
<tr>
<td>Allow Non-User CC Updates</td>
<td>☐</td>
</tr>
</tbody>
</table>

4. Review and update settings in the Client Options section, including how clients can create tickets and who can update the priority.

<table>
<thead>
<tr>
<th>Client Required</th>
<th>☐</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clients Can Create Tickets Using</td>
<td>✓ Web Interface  ☐ E-Mail</td>
</tr>
<tr>
<td>Client Priority Option</td>
<td>○ All Clients  ○ Admin Contacts  ○ None</td>
</tr>
</tbody>
</table>

5. Review and update settings in the Tech Options section.

| Default Tech Note Visibility | ○ Visible  ○ Hidden |
| Print View Note Visibility   | ○ All  ○ Visible Only  ○ Solution Only |
| Note and History Sorting     | ○ Chronological  ○ Reverse Chronological |
| Default Setting for E-Mail Recipients (No Tech Group) | ✓ Tech  ✓ Client |
| Default Ticket Editor Button | ○ Save  ○ Save & E-Mail |

6. Click Save.
Configure the ticket status types

The ticket status identifies the ticket's current stage of completion and indicates whether action is needed.

By default, Web Help Desk includes the following status types. You can modify all preconfigured status types and create additional status types.

<table>
<thead>
<tr>
<th>STATUS</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>The issue requires a resolution. This is the default status of a ticket when it is created.</td>
</tr>
</tbody>
</table>
| Pending| The ticket was received, but it is currently on hold. For example, this status could be used to indicate that a feature request was received but management has not yet decided if the request will be granted.  
This status can also indicate that the assigned tech is waiting for information from a client. You can also create a new status for this purpose. |
| Resolved| The tech believes that a solution was provided and is waiting for the client to confirm the resolution.  
By default, when a tech changes a ticket status to Resolved, the client receives an email asking if the issue is resolved to their satisfaction. If the client clicks Yes, the ticket status changes to Closed. If the clients clicks No, the ticket status changes to Open. |
| Closed | The client confirmed that the issue is resolved. You can also configure Web Help Desk to automatically close a ticket if the client does not respond to the confirmation request within the specified time period. |
| Canceled| The client is no longer experiencing the problem, or no longer needs the service requested in the ticket. |

Modify a preconfigured status type

By default, setting a ticket status to Resolved sends an email asking the client to confirm the resolution. The following example configures the Resolved status to automatically close the ticket if the client does not respond within three weeks.

1. On the toolbar, click Setup.
2. Select Tickets > Status Types.
3. In the list of status types, click Resolved.

   By default, the Resolved status type is configured to send an email prompting clients to confirm that their issue was resolved.

<table>
<thead>
<tr>
<th>Prompt Client to Confirm Ticket Resolution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Confirmation Message</td>
</tr>
</tbody>
</table>
4. Set Automatically Close Ticket After to 3 Week(s).
   If a client does not respond to the confirmation email within three weeks, the ticket status is automatically set to Closed.

   | Automatically Close Ticket After | 3 Week(s) |

5. Click Save.

Create a new status type

This example creates a new status type called Waiting on Client Response.

1. On the toolbar, click Setup.
2. Select Tickets > Status Types.
3. Click New.
4. Enter a Name and Description.

   | Name          | Waiting on Client Response |
   | Description   | Waiting on information from the client |

5. Change the Display Order so that tickets with this status are displayed above Closed, Canceled, or Resolved tickets.

   | Display Order | 3 |

6. Clear the Count Time check box.
   The time spent in this status is not included in the ticket's total open time, and the ticket's due date is extended by the amount of time spent in this status.

   | Count Time |

7. Click Save.
   The new status type is displayed in the list.

   ! You must click Save on the Status Types tab before you click the Options tab. If you do not click Save, the information you entered on the Status Types tab is lost.

8. In the list of status types, click Waiting on Client Response.
9. Click Options.
10. In the Client Update Sets Status To field, select Open.
   When the client updates the ticket, the status automatically changes to Open. This indicates that information has been added to the ticket and the tech can resume work on it.

   | Client Update Sets Status To | Open |

11. Click Save.
Create the ticket custom fields

You can create custom fields to track additional ticket information. These fields can be displayed on all tickets or only certain types of tickets.

This example defines the Start Date field. This field is displayed on tickets with a request type of HR > New Hire Paperwork. It is a Date type, which limits user input to a date selected from a calendar widget.

1. Click Setup.
2. Select Tickets > Ticket Custom Fields.
3. Click New.
   The Ticket Custom Fields screen displays the default values for a new custom field.
4. Enter a label to identify this field.
   ![Label](Start Date)
5. In the Display Order drop-down menu, select this field's position within the Custom Fields section of a ticket.
6. In the Clients and Techs sections, specify whether each group can see or edit the custom field.
   ![Tehcs](Techs with admin accounts can edit all custom fields)
7. Select the Type of input this field will accept.
   ![Type](Date)
   The remaining fields change based on your selection.
8. Complete the remaining fields. Point to any field name to display information.
   ![Info](The new employee's first day of work)
   ![Searchable](Indicates whether this field will appear as a search option from the Advanced Search page)
9. Click Save.
   The Request Types field and an Edit link is displayed on the Ticket Custom Fields screen.
10. Specify which request types apply to this custom field. Only tickets with the selected request type will display this field.
    a. Click the Edit link. A new tab displays a list of request types.
    b. Select one or more request types. To display the custom field on all tickets, click Select All below the list.
    ![HR • New Hire Paperwork]
    c. Click Done to close the tab.
11. Click Save.
Configure the incoming and outgoing e-mail accounts

After you install Web Help Desk and complete the installation, the Configuration Wizard prompts you to set up the email accounts. If you set up your email accounts during the installation, review the incoming and outgoing email account settings in the Web Help Desk Administrator Console. Otherwise, set up these email accounts in the console.

Each incoming mail account is associated with a specific request type, an optional tech group, and an outgoing mail account (SMTP server) used to deliver outgoing mail. For example, you could have an incoming mail account for all IT tickets, another account for HR tickets, and another for Facilities tickets. Web Help Desk checks the Incoming mail accounts each minute for new messages, processes the messages into tickets, and deletes the processed messages from the incoming mail server.

Configure an incoming email account

You can define the requirements for accepting email and initiating some of the automated email processes in the Incoming E-mail Accounts screen.

1. Click Setup and select E-Mail > Options.
2. Click New.
3. Select Enable E-Mail Tickets to enable Web Help Desk to create tickets.
4. In the E-Mail Address field, enter the email address used by Web Help Desk to create new tickets.

5. In the Account Type field, select the email protocol used to access the email account.

   ![Tip] If you select Exchange or Office 365, verify that Exchange Web Services is enabled on the Microsoft Exchange server. If the Exchange server does not support this service, enable the IMAP or POP3 protocol on the server.

6. Select the Compatibility Mode check box if you want to enable Web Help Desk to download the full email from the email server rather than specific parts of the email.

   ![Info] SolarWinds recommends leaving this check box blank.

7. In the Incoming Mail Server field, enter the email account used to send email to clients.

8. Click the Tech Group drop-down menu and select the tech group that filters the incoming email.

9. Click the Request Type drop-down menu and select the request type that is assigned to tickets created from all incoming email.

   ![Info] Ensure that the request type is supported by the selected tech group.

10. Leave the Allow Auto-submitted E-Mail check box and Advanced E-Mail Properties field blank. If your email server fails incoming email tests, you can use these options for troubleshooting. Click the tooltips for more information.

11. Click Save.

**Configure an outgoing email account**

You can define your SMTP server(s) and help desk email address in the Outgoing Mail Options section of the E-Mail Options screen.

![Info] Be sure to delete the sample outgoing server that was installed by default. The sample server may interfere with your SMTP server.
1. Click Setup and select E-Mail Outgoing Mail Accounts.
2. Click New.
3. In the SMTP Server field, enter the IP address of your SMTP server. Use port 25 unless your server uses something other than the default port.
   A green indicator indicates a connection exists to your SMTP server.
   A red indicator indicates a failure to connect to the SMTP server.
4. Click Make Default to configure this account for sending all non-ticket email messages and any ticket messages for incoming mail accounts linked to the default. Otherwise, leave this field as is.
5. Enter a friendly name that displays in the From address for email sent by this SMTP server.
6. Enter a list of domains used by this account for all outgoing emails.
7. Enter any additional properties sent to the email provider for mail server with special needs.
   Click the tooltips for a list of supported parameters.
8. Click Save.
Configure email ticket submissions

Check out this video (3:30) on best practices for ticket submission.

You can submit Web Help Desk tickets by email or through the web interface. Determine whether clients can use both options, or if they are restricted to only one. The following sections describe each option to help you determine which option is best for your organization.

Submit tickets through the web interface

When clients submit tickets through the web interface, the ticket assignment process is streamlined. Tickets are automatically routed to a tech or a tech group based on the ticket's request type.

You can also specify that certain fields on the web interface are required. For example, if you are using location groups, you can refine the ticket assignment by requiring clients to select a location. You can also require customers to complete custom fields that apply to the request type. Collecting relevant information at ticket creation can help techs troubleshoot and resolve the issue more quickly.

As a result, organizations might encourage or even require clients to submit tickets through the web interface.

Submit tickets through email

Email submissions require additional processing, but many organizations choose to enable this functionality because it is convenient for their clients.

When your clients submit tickets through email, Web Help Desk creates a ticket based on the email content. All tickets are routed to the tech group associated with the incoming email account. Techs within this group must evaluate each ticket and select the appropriate request type.

Default incoming email account

All organizations must have a default email account. This account is typically associated with a generic email address that clients can easily remember (such as support@mycompany.com or helpdesk@mycompany.com). The default incoming email address receives all general support emails.

Additional incoming email accounts

You can choose to set up additional incoming email accounts and link them to specific request types. For example, you may decide to restrict potentially sensitive HR requests to the HR tech group. They can set up a second email account (such as hr@mycompany.com) that routes tickets directly to the HR tech group.
Tasks to configure email ticket submission

The following list outlines the tasks required to configure email ticket submission. See the following sections for details.

- **Verify ticket options:**
  - For the Clients Can Create Tickets Using option, select E-Mail (or both).

- **Verify email options:**
  - Enable the Create Accounts for Unrecognized Senders option.
  - Select Create New Ticket when the ticket ID is not recognized.

- **Configure incoming email accounts:**
  - If necessary, set up a request type to assign to tickets created based on emails to the default account. Also, identify or create a tech group who assigns the appropriate request type to these emails.
  - Update the default incoming email account to enable email submissions.
  - Optionally, set up a second incoming email account for sensitive emails.

**Review ticket and email options**

To enable clients to submit tickets through email, verify the values for the following ticket and email options.

**Review ticket options**

Select the option to allow clients to create tickets using email.

1. In the toolbar, click Setup.
2. Choose Tickets > Options.
3. Specify that clients can create tickets using email.

![Clients Can Create Tickets Using E-Mail]

4. Click Save.

**Review email options**

To allow ticket creation through email, specify the following email options.
1. In the toolbar, click Setup.
2. Select E-Mail > Options.
3. Specify whether Web Help Desk should create a new client account when it receives an email account from an unrecognized sender.
   If you enable this option, SolarWinds recommends limiting account creation to emails from accepted domains.

<table>
<thead>
<tr>
<th>Create Accounts for Unrecognized Senders</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
</tr>
<tr>
<td>Only if e-mail matches an Accepted Domain</td>
</tr>
</tbody>
</table>

   Accepted Domains
   - mycompany.com
   - Example: mycompany1.com, mycompany2.com

4. For the When ID in Subject Is Not Recognized option, select Create New Ticket. When an email does not include a ticket ID in the subject line, Web Help Desk will create a new ticket based on the email.

5. Click Save.

---

**Set up incoming email accounts**

Check out this video (9:16) on creating tech accounts and email accounts.

When you installed Web Help Desk for the first time, you created the incoming and outgoing email accounts in the Configuration Wizard. If you decided to skip this step during the initial setup, create the incoming and outgoing email accounts to get started.

To enable clients to submit Web Help Desk tickets via email, edit the default incoming account. You can also create a second incoming account for specific request types.

To enable clients to submit tickets via email, review the ticket and email options.

---

**Determine who processes tickets from the default incoming account**

Decide which request type will be assigned to tickets that are created based on emails sent to the default incoming account. Also decide which tech group will be responsible for evaluating each ticket and assigning the appropriate request type. If necessary, create a new request type and tech group for this purpose.

In this example, you will create a new request type called Incoming Email, which will not be visible to clients. Tickets with this request type will be routed to a tech group called Assignment.

When an Incoming Email is assigned to the Assignment group, a member of that group reads the ticket details and selects the appropriate request type. When the request type is updated, Web Help Desk reassigns the ticket to the tech group responsible for that request type.
1. Create a request type to assign to tickets created through email:
   a. In the toolbar, click Setup.
   b. Select Tickets > Request Types.
   c. Click New.
   d. Enter a name to identify the Request Type.
   ![Request Type: Incoming Email]
   e. Clear Visible to Clients to prevent clients from selecting this type when they create tickets through the web interface.
   ![Visible to Clients: Off]
   f. Clear Use as FAQ Category to prevent techs from using this type to categorize FAQs.
   ![Use as FAQ Category: Off]
   g. Click Save.

2. Create a tech group to assign the appropriate request type to these tickets.
   a. Select Techs > Tech Groups.
   b. Click New.
   c. Specify the group name and manager.
   ![Group Name: Assignment, Group Manager: Wentwood, Francis]
   d. Click Save.
   e. Click the Tech Group Levels tab, and then click Level 1.
   f. Specify the group members and other options.
   g. Click Save.
   h. Click the Request Types Supported tab, and then click Edit.
   i. Select the request type this group services.
   ![Incoming Email: On]
   j. Click Save.
3. Verify that the techs in this group have permission to reassign tickets.
   a. To find out what permission set is assigned to a tech, select Techs > Techs. Then click a name to view
      the tech’s account.
      The Tech Permissions field is located on the Account Info tab.
      
      | Tech Permissions | Default |
      |------------------|---------|

   b. Select Techs > Tech Permissions.
   c. Click the name of the permission set to open it.
   d. Verify that Allow Re-Assignment is selected.
      
      | Allow Re-Assignment |
      |---------------------|
      | ✓                   |

      If this option is not selected, you can either assign the tech to a different permission set or select this
      option for the current permission set.

Update the default incoming account to enable email ticketing

To enable clients to submit email requests, select this option on the default account and identify the associated
request type.

The following example updates the existing settings on the default email account to enable clients to submit tickets
via email. All tickets sent to the default email address will have a request type of Incoming Email.

1. Select E-Mail > Incoming Mail Accounts.
2. Click the name of the default account to display the account settings.
3. Select Enable E-Mail Tickets.
   
<table>
<thead>
<tr>
<th>Enable E-Mail Tickets</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
</tr>
</tbody>
</table>

4. Verify that this account is the default incoming account.
   
<table>
<thead>
<tr>
<th>Default</th>
<th>Yes</th>
</tr>
</thead>
</table>

5. Leave the Tech Group blank.
6. Select the Request Type that will be assigned to tickets created through this email account.
   
<table>
<thead>
<tr>
<th>Tech Group</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Request Type</td>
<td>Incoming Email</td>
</tr>
</tbody>
</table>

    7. Click Save.

Create a second incoming account for sensitive tickets

The following example provides instructions for setting up a second incoming email account. This account will be
used to process HR tickets.
1. If the default email account settings are open, click to return to the list of incoming accounts.

2. Click New.

3. Select Enable E-Mail Tickets.

4. Verify that this account is not the default incoming account.

5. Enter the address for the account that Web Help Desk will check for new tickets.

6. Web Help Desk will delete all messages from this account. Do not specify an account that is being used for any other purpose.

7. Specify the account type, server information, credentials, and folder. See the tooltips for more information.

8. Select the outgoing mail account used to send replies to emails sent to this incoming account. You can associate the same outgoing account with both the default incoming account and this incoming account.

9. Leave the Tech Group blank, and then select the Request Type that will be assigned to tickets created through this email account.

10. If necessary, specify advanced email properties.

11. Click Save.
Set up asset management

Asset management is a set of processes used to track the deployment, use, and maintenance of assets across an enterprise. An asset is any item owned by a company. For example, IT assets can include items such as servers, laptops, and monitors.

SolarWinds Web Help Desk provides IT asset management functionality, including:

- A central repository for assets
- Discovering Windows-based assets and importing assets from other repositories
- Inventory maintenance and record keeping
- Integration with DameWare Remote Support software for troubleshooting
- A reporting engine that you can use to generate preconfigured and custom reports

Centralized repository

Web Help Desk maintains a complete product catalog of all assets owned by your company, which includes price and warranty details. With a customizable asset details form, you can track your client assignments, purchase orders, warranty information, and configuration details.

Asset discovery

Using a built-in scanning engine, Web Help Desk can discover your network systems based on subnet or IP range. Using scheduled WMI discovery, Web Help Desk can periodically poll endpoints to update hardware and software inventory information, including:

- Host name
- Model
- Serial number
- Operating system
- Hard drive
- Memory
- Installed software

You can also import asset inventory information from third-party asset discovery tools, spreadsheet records, and network management systems. If you are running SolarWinds Network Performance Monitor (NPM), Server & Application Monitor (SAM), or Network Configuration Manager (NCM), you can synchronize your Web Help Desk node and asset discovery in your corporate network.

Web Help Desk also integrates with third-party asset discovery tools, such as Casper and Microsoft SCCM (System Center Configuration Manager).
Inventory maintenance and record keeping

You can use Web Help Desk to associate asset details with service requests so you can track the ticket history for each asset. You can also manage information about purchase orders, parts, and billing. For example, when you enter purchase order information for an asset, Web Help Desk calculates warranty and lease end dates, and notifies you prior to the expiration date.

Techs and clients can use the Web Help Desk reservation center to select a checkout time and date range for a specific asset. You are notified when a checked-out asset is due, helping you to identify overdue, lost, or stolen inventory.

Troubleshooting

To simplify troubleshooting and support, you can launch remote desktop sessions directly from your asset inventory. With built-in integration with DameWare Remote Support software, in addition to native remote desktop protocol (RDP) and virtual network computing (VNC) connections, you can establish remote sessions with user systems and provide instant assistance.

DameWare requires the user be within the network.

Reporting

You can use Web Help Desk to generate asset reports based on location, department, asset type, asset status, and purchase and warranty dates.

Reports can help you:

- Find assets approaching the end of warranty
- Identify the most problematic assets
- Report on reserved assets that are overdue

Create locations

This is the first task in the process of configuring asset management.

Assets are deployed to various locations throughout an enterprise. A location is assigned to each asset.

The following example shows how to create a location in Web Help Desk. The location will be assigned to an asset later in this guide.
1. On the toolbar, click Setup.
2. Click Companies and Locations > Locations and Rooms.
3. Click New.

![Image of Locations Table]

4. Complete the remaining fields as needed and click Save.

When you assign a location to an asset, you can generate preconfigured reports that count the number of assets for each location. In this scenario, two locations are created, and in a future topic, each location is assigned to assets.

![Image of Austin Location Info]

Next task: Create an asset type, status type, and warranty type

Create asset, status, and warranty types

Assets are grouped into asset types—such as hardware and software. Asset types help you manage a large number of assets, and can be used when searching for assets and filtering asset report data.

Asset status describes the asset lifecycle state. For example, when a laptop is provisioned and assigned to a client, the asset status is Deployed. When an asset is decommissioned and no longer used, you can update the asset status to Retired.

An asset warranty type helps you manage assets with an expiring warranty. When you track warranty information, you can generate reports that include the warranty expiration date, and use that information to purchase an extended warranty, if required.

Prerequisite

This is the second task in the process of configuring asset management. Before you start, complete the first task:

- Create locations
Create an asset type

In the following example, two asset types are created. An asset type is selected when an asset is created.

1. On the toolbar, click Setup.
2. Click Assets > Types.
3. Click New.
4. Enter a name to identify the asset type.
5. Click Save
6. Repeat steps 3 - 5 to add another asset type.

Create an asset status type

In the following example, four asset statuses are created. Asset status is optional when you create a new asset.

1. On the toolbar, click Setup.
2. Click Assets > Types.
3. Click Asset Status Types, and click New.
4. Enter a name and indicate whether assets with this status are retired.

Name: Deployed
Retired: [ ]
5. Click Save
6. Repeat steps 3 -5 to add other status types.

---

Create a warranty type

In the following example, four warranty types are created. Warranty is optional when you create a model.

1. On the toolbar, click Setup.
2. Click Assets > Types.
3. Click Warranty Types, and click New.
4. Enter a name and indicate whether assets with this status are retired.
5. Click Save
6. Repeat steps 3 -5 to add other status types.

---

Add a manufacturer and model

When you create an asset in Web Help Desk, you must select a manufacturer and model. This example shows how to create a manufacturer and a model. You will assign these to assets later in this guide.

Prerequisites

This is the third task in the process of configuring asset management. Before you start, complete the previous tasks:
- Create locations
- Create asset, status, and warranty types

Add a manufacturer and model

1. On the toolbar, click Setup.
2. Click Assets > Manufacturers & Models.
3. Click New.
4. Enter a name, complete the remaining fields as required, and click Save.
5. Click Model Editor.
6. Click New.
7. Enter a name, select an Asset Type, and select a Default Warranty.
8. Click Save.
9. Continue to add models for the manufacturer as needed.
Add an asset

An asset is any item owned by an enterprise. For example, IT assets can include items such as servers, laptops, and monitors. This section describes how to add an asset in Web Help Desk.

Prerequisites

This is the third task in the process of configuring asset management. Before you start, complete the previous tasks:

- Create locations
- Create asset, status, and warranty types
- Add a manufacturer and model
Add an asset

The following steps show how to manually add an asset. You can also configure asset discovery.

1. On the toolbar, click Assets, and then click New Asset.

2. Complete the following fields as required. Click the tooltips for more information.
3. Click Asset Details and complete the following fields as needed. Click the tooltips for more information.

4. Click Save.

Asset discovery

Web Help Desk supports several methods of automated asset discovery. Using one or more of these tools, you can synchronize Web Help Desk with your selected discovery tool and import the assets into the Web Help Desk database.

Web Help Desk discovers assets using its native WMI discovery engine and can pull assets from the following asset discovery tools and databases:

- Apple® Remote Desktop 3.x and later
- Casper Recon Suite
- LANrev Client Manager 4.6.4
- Systems Management Server (SMS) / Microsoft® System Center Configuration Manager (SCCM)
- Database Table or View
- SolarWinds NCM, NPM, and SAM asset synchronization
- Lansweeper 5.x

This guide covers the WMI discovery engine, SolarWinds asset synchronization, and Lansweeper 5.x.
Configure the Discovery Engine (WMI)

The Web Help Desk Discovery Engine (WMI) allows you to discover Microsoft Windows-based assets based on subnet or IP range. By using scheduled WMI discovery, Web Help Desk can periodically poll endpoints to update hardware and software inventory information, including:

- Host name
- Model
- Serial number
- Operating system
- Hard drive
- Memory
- Installed software

The Discovery Engine uses a set of administrator credentials to scan at least one IP address range for a new discovery connection. Web Help Desk stores and encrypts all administrator credentials in the database with the connection parameters (such as IP ranges and schedule).

Using this discovery connection, you can create separate Discovery and Auto-Sync job schedules. A Discovery job scans a selected IP address range and discovers endpoints that accept at least one of the saved credentials. The first time you run the discovery job, it forces an auto-sync (collection) that collects configuration data from endpoints retrieved by the discovery job.

1. On the toolbar, click Setup > Assets > Discovery Connections.
2. Click New.
3. Enter a name for the connection.
4. Select WHD Discovery Engine (WMI).
5. Enter the IP Ranges for the discovery engine to scan.

6. Enter the credentials.

7. Complete the remaining fields as required.

8. Click the Attribute Mapping tab and map the asset fields. All bold selections are required.
   The asset attributes are different for each discovery tool, mapping directly to the values in the discovery tool’s database.

9. Click Save.

10. Run the discovery job manually, or wait until the scheduled discovery job completes.

11. To view the imported assets, click Assets > Search on the toolbar.

**Configure the Lansweeper settings**

You can configure Web Help Desk to periodically discover assets stored in Lansweeper Network Management.

Before you begin, locate the following Lansweeper information:

- IP address and port number
- Login and password
- Database logon and password
To configure Web Help Desk to discover assets stored in Lansweeper:

1. In the toolbar, click Setup > Assets > Discovery Connections.
2. Click New.
3. In the Connection Name field, enter a name for the new connection.
4. Click the Discovery Tool drop-down menu, and select Lansweeper.
5. Enter the Lansweeper database host name, port number, database name, user name, and password.
6. Complete the remaining fields as required, and click Save. The Attribute Mapping tab displays.
7. Click the Attribute Mapping tab and map the asset fields as appropriate. All bold selections are required.
8. Click Save.

To view the imported assets, click Assets > Search.

To configure Web Help Desk to periodically discover assets stored in SolarWinds Network Performance Monitor (NPM), Server & Application Monitor (SAM), and Network Configuration Manager (NCM).

Before you begin, locate the following information:
- SolarWinds Orion Platform system IP address and port number
- SolarWinds Orion Platform login and password
- System database’s login and password

To configure Web Help Desk to discover assets stored in SolarWinds NPM, SAM, or NCM:

1. In the toolbar, click Setup.
2. Select Assets > Discovery Connections.
3. Click New.

![Asset Discovery Connections](image)

4. In the Connection Name field, enter a name for the new connection.

![Connection Basics](image)

5. Click the Discovery Tool drop-down menu and select one of the following, depending on which connection you want to discover your assets:
   - SolarWinds Network Configuration Manager
   - SolarWinds Network Performance Monitor
   - SolarWinds Server & Application Monitor

💡 To discover your assets using more than one SolarWinds product, you must configure separate discovery connections for each product.
6. Enter the NPM, SAM, or NCM database host name, port number, database name, user name, and password.

7. Complete the remaining fields as required.

   For more information about any field, see the tooltips.

8. Click the Attribute Mapping tab, and map the asset fields as appropriate. All bold selections are required.

9. Click Save.

10. To view the imported assets, on the toolbar, click Assets > Search.
Configure the ticket types

This section describes how ticket types work and how to link and manage incident tickets and problem tickets.

How ticket types work

By default, all Web Help Desk tickets are created as service request tickets. If necessary, a tech can change a service request to an incident or a problem ticket.

Service request tickets

A service request is a planned request for a new or modified service. When you hire a new employee, you can create service requests for setting up a workspace, purchasing a laptop computer, and assigning a telephone number.

If you want to track multiple service requests within one ticket, you can create one ticket as the parent service request and link the remaining service requests as children to the parent ticket. Use this option to view the status of all child service requests within one ticket.

For example, Jessie Burns is setting up a new server room in her department. She decides to purchase 12 1U rack mount servers and 12 1U rack mount storage systems. She creates a new service request, and indicates that she wants to purchase this computer equipment for his department. She submits separate service requests for the servers, storage systems, and computer racks, because they are all purchased from separate vendors. To manage this project, she opens his initial request for computer equipment as the parent service request, clicks the Requests tab, and links the remaining service requests as children to the parent ticket.

The parent ticket displays each service as a linked child ticket. Linking the tickets will help Jessie manage his service requests for new equipment. When all service requests are resolved, Jessie can close the parent service request ticket.
When you close a parent service request ticket, all child service requests are not closed automatically.

Incident and problem tickets

An incident is an unplanned event that causes an interruption or reduction in service. If the new employee receives a laptop computer and cannot connect to the corporate network, you create a service request ticket that a tech can later classify as an incident. If you encounter two or more similar incidents, you can link the incident tickets to a problem ticket.

A problem identifies the root cause of one or more incidents. If the new employee and several other employees cannot log in to the corporate network, you can create a service request ticket that a tech can later classify as a problem. The tech can then link all incident tickets as supporting incidents (or children) to the problem ticket. This process—known as parent-child service relationships—is used to group identical tickets together so you can troubleshoot and resolve all tickets as one problem. When the incident tickets are resolved, you can close all tickets simultaneously by closing the parent ticket. All incident tickets are resolved as a group.

Although linking incident tickets to a problem ticket is not required, it does make managing these tickets easier. For example, once linked, you can see the status of any incident and navigate to it within the properties of the problem ticket. In addition, closing a problem ticket automatically closes all incident tickets, which means that you do not need to close the incident tickets one at a time.

For example, Janet, Ellen, and Bruce submit a service request ticket stating that they cannot access their email in Microsoft Outlook. After researching the problem, you discover that your Microsoft Exchange server is down and needs to be restarted. To troubleshoot and resolve all client tickets in one ticket, you can change the request type on one client ticket to Problem and the remaining tickets to Incident. Then link all the incident tickets to the problem ticket so they are shown as linked incidents. When all incidents are resolved, you can close the parent ticket.

When you close a parent problem ticket, all incident tickets are closed automatically.
Link incident tickets to problem tickets

You can use Web Help Desk ticket types to link related tickets and manage them as a group.

Perform this procedure to track multiple incidents in one problem ticket. This process can help you track all incidents related to a problem in your company, such as a network failure or power outage.

1. Open the service request ticket that you want to change to a problem ticket.
2. Click Problem, and click Save.

![Diagram of a service request ticket]

The problem ticket will be the parent of each incident ticket.

3. Open the service request ticket that you want to change to an incident ticket.
4. Click Incident.

![Diagram of an incident ticket]
5. Within the incident ticket, click the Problems tab.

6. Search for the problem ticket that you want to make the parent of the incident.

7. In the Action column, click Link to make the selected ticket the parent of the current ticket.

8. Save your changes.

9. Repeat steps 3 - 8 for each incident you want to link to the parent.

Next task: Manage problem and incident tickets

Manage problem and incident tickets

After you have linked a set of incident tickets to a problem ticket, you can manage these tickets as a group. To do this, open the problem ticket and perform the following actions, as necessary.

For more information about Web Help Desk ticket types, see How ticket types work.
Click a child ticket to open its details.

Click delete if you want to remove the relationship between the problem and the incident.

When you add a note to the problem, you can also propagate the note to linked incidents.

When you close a problem ticket, all linked incident tickets also close.

A tech cannot email all Incident ticket recipients from a Problem ticket. However, if a Problem ticket is set to Closed, all Incident tickets are Closed. This action generates a Ticket Closed email to all Incident ticket recipients.
Train the techs

This section provides a template you can use to develop training materials for your techs. Use this material as it is, or copy and revise it to reflect your organization's practices and Web Help Desk configuration.

Get started with Web Help Desk

This section of the Web Help Desk tech training introduces basic terms and provides instructions for logging in, logging out, and editing your tech profile. Use this material as it is, or copy and revise it to reflect your organization's practices and Web Help Desk configuration.

What is Web Help Desk?

Web Help Desk is a web-based automated ticketing solution that helps you manage your IT support requests for both internal and external clients. Use Web Help Desk to create and manage tickets through the web console. It also supports email ticket creation, automatic ticket assignment and escalation, asset management, and incident and problem management.

Web Help Desk Terms

The following terms define the roles and objects managed by Web Help Desk.

- **Tickets**: Support requests that are opened through and managed within Web Help Desk. Tickets can be initiated through email, created in the Web Help Desk console, or imported from another application.
- **Clients**: End users or customers who can open tickets in Web Help Desk. Clients can enter tickets through email or through the Web console.
- **Techs**: Web Help Desk users who troubleshoot and resolve tickets. Techs can also enter tickets. For example, when a client calls the IT Help Desk, the tech opens a ticket on the client's behalf. In addition, techs can open tickets that are not associated with a client, such as tickets to schedule routine maintenance or system upgrades.
- **Admins**: Techs with privileges to configure Web Help Desk.
- **Tech Groups**: A group of techs with similar skills and expertise.
- **Request Types**: A classification that identifies the type of support request. Request types are used to automatically assign tickets to the appropriate tech group.
Log in to Web Help Desk

1. Open a Web browser.
2. Enter the following URL:
   <your help desk URL>
3. Enter your login ID and password, and then click Log In.

Web Help Desk sessions last for 120 minutes. After this period, the session expires and you must log in again.

Get more information about using Web Help Desk

Use any of the following options to get more information about using Web Help Desk:

- Click the Help button in the Web Help Desk toolbar to open the Web Help Desk administrator guide.

- Get information about a specific item by clicking the Help button next to that item.

Or click the information icon.
• Hover over icons and some column headings to display additional information.
  For example, on the Ticket History tab, hover over any icon on the right side to display information. The person icon displays the logic used to assign the ticket to this tech.

Log out of Web Help Desk

Click the Log Out button in the upper-right corner, next to your name.

Edit your tech profile

Your tech profile includes contact information (such as email and cell phone) and preferences. Edit your tech profile to add or update information.

1. Click the gear icon in the upper-left corner to open your profile.
2. Click the pencil icon to enter edit mode.
3. Verify that your contact information is correct.
4. To be able to access the Web Help Desk interface that a client sees, select a client in the Linked Client field. If a demo client is available, select the demo client.

When you link your account to a client account, the Switch to Client Account icon is available in the upper-right corner.
5. To receive notifications on a mobile device:
   a. Select SMS E-Mail Enabled.
   b. Enter the SMS address (for example, 18005551234@tmomail.net). Click the information icon for the address formats of major carriers.
   c. Specify the minimum priority and alert level for notifications. In the following example, notifications are sent only when the priority is Urgent and the alert level is 2 or higher.

<table>
<thead>
<tr>
<th>SMS E-Mail Enabled</th>
<th>✓</th>
</tr>
</thead>
<tbody>
<tr>
<td>SMS E-Mail Address</td>
<td><a href="mailto:05551234@tmomail.net">05551234@tmomail.net</a></td>
</tr>
<tr>
<td>Minimum Priority for SMS E-Mail</td>
<td>Urgent</td>
</tr>
<tr>
<td>Minimum Alert Level for SMS E-Mail</td>
<td>2</td>
</tr>
</tbody>
</table>

6. Update other preferences as needed. Click the information icon for details about any field.

Create tickets

Clients can create tickets through email or through the Web using the Web Help Desk client interface. The client interface is what clients see when they log in to the Web console.

Techs can also create tickets through email or through the Web. In most cases, techs create tickets through the Web using the Web Help Desk tech interface. The tech interface is what techs see by default when they log in to the Web console.

A tech can access the client interface if the tech’s profile is associated with a client account.

In addition, techs with the required privilege can define Web Help Desk tasks (scripts) which will create certain types of tickets automatically.

Create a ticket through the Web Help Desk tech interface

1. In the toolbar, click Tickets.
2. Click New Ticket.
3. If the ticket is to report a client issue, use the Client Lookup box to select the client.
4. If the ticket requires an asset, click the Asset tab and add the asset.
5. Click the Ticket Details tab.
6. Select a Request Type.
   The Assign To field is displayed, showing which tech group will receive this request based on the Web Help Desk ticket assignment logic. You can override the ticket assignment logic and assign the ticket to yourself.
7. Enter a Subject and Request Details to describe the issue.
8. Specify the Priority.
9. Click one of the following buttons:
   - Save: Saves the ticket.
   - Save and Send E-Mail: Saves the ticket and sends an email to the specified recipients. (The tech, client, location, and ticket setup options determine who receives email.)

Create a ticket through email

Clients and techs can create tickets by sending an email message to the dedicated help desk email address. Web Help Desk creates a ticket for each new message received through its dedicated email address.

Organizations can choose to set up help desk email addresses. For example, an organization can have one email for HR issues (hr@example.com) and another for all other issues (support@example.com). Tickets created through the HR address are assigned an HR request type, which routes them to a specific tech group. Tickets created through the general support address are assigned a general request type. Tech groups who receive general request types must evaluate the ticket and assign the appropriate request type to each ticket.

Identify the help desk email accounts your organization has set up:

<table>
<thead>
<tr>
<th>EMAIL ADDRESS</th>
<th>REQUEST TYPE</th>
<th>TECH GROUP</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

View and customize the ticket queue

This section of the Web Help Desk tech training describes how to display a list of tickets and how to customize your view of the ticket queue. Use this material as it is, or copy and revise it to reflect your organization's practices and Web Help Desk configuration.

Display a list of tickets

Use Web Help Desk to quickly access lists of tickets that are assigned to you or to your tech group.

1. In the toolbar, click Tickets.
2. In the menu bar, select one of the following to display a list of tickets:
   - My Tickets displays tickets assigned to you.
   - Group Tickets displays tickets assigned to any tech in a tech group you belong to.
   - Flagged Tickets displays tickets that you flagged.
   - Recent Tickets displays tickets that you have edited recently.

About the ticket queue

The ticket queue provides information about each ticket in the list.
In the first column, you can select tickets for **bulk actions**, such as merging tickets.

The second column provides color-coded ticket information:

- Blue: New ticket with no tech response
- Purple: Ticket reassigned to a new tech
- Yellow: Ticket with a new client update
- None: Ticket that does not meet any of the categories above

Click the flag column to flag a ticket or to remove an existing flag. Flagging a ticket adds it to your Flagged Tickets queue, which you can access by clicking Flagged Tickets in the toolbar. Use flags to mark tickets that require immediate follow-up or special attention.

If a ticket is unassigned, the last column displays the Assign to Me icon. You can click the icon to assign the ticket to yourself.

**Sort the ticket queue**

Click a column heading to sort the list of tickets by the values in that column. Click the column heading again to reverse the sort order.

Sort the tickets by the Alert Level to ensure you see tickets that require immediate action. Sort by Date to see the oldest tickets first.

**Customize your view of the ticket queue**

You can customize your view of the ticket queue by creating one or more column sets. Each column set specifies which columns are displayed and in what order.

1. Display any ticket queue.
2. Click the + button in the upper-right corner to create a new column set.
   To edit an existing column set, select the column set and click the edit button.
3. Enter a name to identify the column set.
4. To choose which columns are included, drag column labels into or out of the Selected Columns list.
5. To specify the order of the columns, drag column labels up or down in the list to arrange them.
6. Click Save.
Search for a ticket

This section of the Web Help Desk tech training describes how to perform basic and advanced searches, and provides examples of advanced searches. Use this material as it is, or copy and revise it to reflect your organization’s practices and Web Help Desk configuration.

Perform a basic search

A basic search locates tickets based on the search criteria you enter in a set of predefined fields.

1. On the top toolbar, click Tickets.
2. On the second toolbar, click Search Tickets.
3. Enter values in one or more fields to define the search criteria.
4. Click Search to display a list of tickets that match your criteria. When you locate a ticket, you can update it as needed.

Perform an advanced search

An advanced search locates tickets based on any number of search criteria you enter. The search criteria are a set of conditions that must be met.

An advanced search may return results that do not populate in a basic search, even if you use the same query.

1. On the top toolbar, click Tickets.
2. On the second toolbar, click Search Tickets.
3. Click the Advanced Search tab.
4. Specify the conditions that the ticket must meet, starting from the left and continuing to the right. Click + in the ALL or ANY section to add additional conditions.
   - Every condition specified in the ALL group must be met for a ticket to be found. These conditions are evaluated with a Boolean AND operator.
   - At least one condition specified in the ANY group must be met for a ticket to be found. These conditions are evaluated with a Boolean OR operator.
   - Enter conditions in either or both groups. See the following section for examples of advanced searches.
5. To save this query so that you can run it again:
   a. Enter a name in the Save Query as field.
   b. Select Shared to make the query available to other techs.
   c. Click Save.
6. Click Search to run the query.

Advanced search examples

Advanced searches can answer a variety of questions. Examples include:
• Which tickets assigned to a specific tech have not been updated within the last 10 days?

A Date condition that includes 0 business days, business hours, business minutes, and so on does not return a result.

• Which tickets contain the words "network outage" in a client note OR the request details OR the subject?

• Which tickets assigned to a tech group have a priority of Urgent OR have an escalation level of 2 or higher?

Update and resolve tickets

This section of the Web Help Desk tech training describes how to update ticket information, perform actions on multiple tickets, and resolve tickets. Use this material as it is, or copy and revise it to reflect your organization's practices and Web Help Desk configuration.

Ticket information

Tickets in Web Help Desk include information on the following tabs:

• Client Info: identifies the client who requested support. This information is populated automatically from the client account.

• Asset Info: identifies assets (such as PCs) that are associated with the client or with the support request.

• Ticket Details: contains specific information about this request, incident, or problem. This is the tab that techs use to add notes or change the status.

• Parts and Billing: identifies parts ordered to complete this request and information about billing for the part.

Edit a ticket from the Web Console

As you work to resolve a ticket, update the ticket frequently so your activity can be tracked. For example, add notes to record activities, track progress, and document the resolution.

1. Search for the ticket you want to edit, or locate it in your ticket queue.
2. Click the ticket number to open it.
3. Select a ticket type.

A service request is a planned request for a new or modified service. When you hire a new employee, you can create service requests for setting up a workspace, purchasing a laptop computer, and assigning a telephone number.

An incident is an unplanned event that causes an interruption or reduction in service. If the new employee receives a laptop computer and cannot connect to the corporate network, you create a service request ticket that a tech can later classify as an incident. If you encounter two or more similar incidents, you can link the incident tickets to a problem ticket.

A problem identifies the root cause of one or more incidents. If the new employee and several other employees cannot log in to the corporate network, you can create a service request ticket that a tech can later classify as a problem. The tech can then link all incident tickets as supporting incidents (or children) to the problem ticket.
4. Select the request type that accurately reflects the type of ticket. The ticket is transferred to the tech group that services the request type you selected. Add a note to explain the reason you changed the request type.

5. Select the Priority.
The priority determines the ticket's due date, and should reflect the severity of the issue and the people or affected business functions. Select one of the following:
   - Urgent: a failure that severely impacts critical operations.
   - High: an issue that degrades response times or affects normal operations.
   - Medium: an issue that affects a small number of users or an individual user. A work-around is available.
   - Low: questions or requests for information.

6. Add or update the remaining ticket fields.

7. Click Save to save the ticket or Save & Email to save the ticket and send an email to the specified recipients.

To return to the ticket queue, click the arrow icon in the upper-left corner.

Update tickets using email

When a ticket is assigned to you, Web Help Desk sends you an email. Respond to the email to update the ticket.

1. In the Notes section, select an action. You can add a note, add a hidden note, or delete the ticket.
2. Hold down the Control key and click the ticket number.
   Web Help Desk creates an email similar to the following example. In this example, the tech chose to add a note that is visible to the client.
3. Verify the options listed in the subject line.
   - The Action is based on the action you selected. For example, if you select Add Note, the action in the Subject is Tech Update.
   - The Email Client option defaults to YES. Enter NO if you do not want to email the client. (This option is not case-sensitive.)
4. Enter your note as the body of the email and send the email.

Perform actions on multiple tickets

Use bulk actions to apply a set of changes to multiple tickets at once. For example, you can use a bulk action to escalate all open, unassigned, urgent priority IT requests for laptop repairs.

Create a new bulk action

Before you apply a bulk action, create the bulk action that defines what change will be made to the ticket. After you create a bulk action, you can apply it at any time. You can also share the bulk action so that other techs can apply it.

1. In the toolbar, click Tickets.
2. In the menu bar, select a ticket screen.
3. Scroll to the bottom of the screen and locate the Bulk Action box.
4. Click [+] next to Bulk Action.
5. On the Bulk Action Details screen, specify values in the fields that you want the bulk action to change. Leave all other fields blank.
6. In the Save Bulk Action as field, enter a name for this bulk action.
7. (Optional) Select Shared to share this bulk action with other users.
8. Click Save.
    The saved bulk action will be listed in the Bulk Action drop-down menu in the Tickets screen.

Apply a bulk action to a group of tickets

After you create a bulk action, you can apply it to a selected a group of tickets.

1. In the toolbar, click Tickets.
2. In the menu bar, select a ticket screen, or select Search Tickets and Search for the tickets you want to change.
3. Select the tickets for bulk action.
   - To select all tickets on the page, select the check box above the first column.
   - To select individual tickets, select the check box in the first column of each ticket row.
4. Below the list of tickets, select an option from the Bulk Action drop-down menu.
5. Click the Run button to apply the bulk action.
6. Click OK.
    A message confirms that the changes were applied.
Resolve a ticket

When you have completed all activities required to resolve an issue, edit the ticket:

- Add a note to describe the resolution. Select the Solution check box because this helps other techs when they search for solutions to similar issues.
- If this resolution would be helpful for other Web Help Desk users, click Create FAQ to create an FAQ based on the ticket note.
- Change the Status to Resolved.

When you change the status to Resolved, Web Help Desk sends an email to the client asking them to confirm that the issue is resolved.

- If the client clicks Yes, the Status changes to Closed.
- If the client clicks No, Web Help Desk reopens the ticket and notifies you.
- If the client does not respond within the specified number of days, the Status changes to closed.
Train the clients

This section provide a template that you can use to develop training materials for your Web Help Desk clients. Use this material as it is, or copy and revise it to reflect your organization’s practices and Web Help Desk configuration.

Clients can use Web Help Desk to submit support requests (called tickets). They can then view and update tickets as needed, and confirm that they have been resolved.

Ways to submit a ticket

You can submit a Web Help Desk ticket using any of the following methods:

- By Telephone: _____<your help desk telephone number>_____
- By Email: _____<your help desk email address(es)>_____
- Using the Web Help Desk web console: _____<your Web Help Desk URL>_____

The most efficient and direct way to enter your request is through the Web Help Desk web console.

Log in to Web Help Desk console

1. Open a Web browser.
2. Enter the following URL:
   <your Web Help Desk URL>
3. Do one of the following:
   - If you have an account, enter your login ID and password and click Log In.
   - If you do not have an account, click New Account, enter account information, and click Submit.
   The Help Request page is displayed.

Review and update your Web Help Desk profile

Your profile includes contact information (such as email and cell phone) and preferences. Edit your profile to add or update information. The information in your profile will be used to contact you about requests. SolarWinds recommends reviewing your profile before you create your first request.

1. In the Web Help Desk console toolbar, click Profile to display your profile.
2. Verify that your contact information is correct.
   Optionally, you can enter additional contact information. For example, you can add your mobile phone number to the Phone 2 field.
3. If your organization has multiple locations, verify that the Location field shows your work location. This information can be used to determine which support team receives your request.
4. Click Save to save any changes.

Create a ticket using the web console

1. If the Help Request page is not displayed, click Request in the Web Help Desk console toolbar.

2. Select the Request Type option that best describes the reason for your request. After you select the request type, one or more subcategory fields might be displayed. Select an option in each subcategory field.

   If any FAQs are associated with the selected request type, they are listed on the right. FAQs can sometimes provide the information you need to resolve the issue. If one of the FAQs seems to be related to your issue, click the FAQ title to open it in a separate browser tab.

3. Enter a brief description of your request in the Subject field.
4. **In the Request Detail section**, provide a detailed explanation of your request or problem.

5. If you have supporting documents such as log files, screen shots, or configuration files, click Add File and attach them to the request.

6. **Verify that your Location is correct.**

7. **Select the Priority**, using the following guidelines.

   ![If you select Urgent or High, make sure that you are available for the initial response, or provide the name and phone number of an alternate contact.]

<table>
<thead>
<tr>
<th>Priority</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Urgent</strong></td>
<td>A failure that severely impacts critical operations.</td>
</tr>
<tr>
<td></td>
<td>- The problem affects an entire location or a significant number of users.</td>
</tr>
<tr>
<td></td>
<td>- Customers are directly impacted, or critical operations such as shipping, manufacturing, or order entry are unavailable or severely impacted.</td>
</tr>
<tr>
<td><strong>High</strong></td>
<td>An issue that degrades response times or affects normal operations.</td>
</tr>
<tr>
<td></td>
<td>- A website or service is functioning, but performance is degraded.</td>
</tr>
<tr>
<td></td>
<td>- The problem affects a small to medium number of users.</td>
</tr>
<tr>
<td></td>
<td>- Customers are directly impacted, or critical operations such as shipping, manufacturing, or order entry are available but negatively impacted.</td>
</tr>
<tr>
<td><strong>Medium</strong></td>
<td>An issue that affects a small number of users or an individual user. A work-around is available.</td>
</tr>
<tr>
<td><strong>Low</strong></td>
<td>Questions or requests for information.</td>
</tr>
</tbody>
</table>

8. **Complete any additional fields associated with the selected Request Type.** A blue information icon identifies required fields.

9. **Click Save to create the ticket.** The system sends you a confirmation message containing your ticket number.

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**Locate a ticket**

1. **In the Web Help Desk console toolbar, click History.**

   The Ticket History screen lists all tickets you have entered.

   ![Ticket History]

<table>
<thead>
<tr>
<th>Ticket No.</th>
<th>Status</th>
<th>Updated</th>
<th>Request Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>36</strong></td>
<td>Open</td>
<td>2/28/14</td>
<td>New White Board: My room just received a new white board. I need some assistance installing it. Than...</td>
</tr>
<tr>
<td><strong>37</strong></td>
<td>Open</td>
<td>2/28/14</td>
<td>Login not working: please provide the login id for susan smith.</td>
</tr>
<tr>
<td><strong>38</strong></td>
<td>Open</td>
<td>2/28/14</td>
<td>Reimage Computer Lab: Update main image on server and run Helstall.</td>
</tr>
<tr>
<td><strong>39</strong></td>
<td>Open</td>
<td>2/23/14</td>
<td>Hard drive noise: My hard drive is making a clicking noise.</td>
</tr>
</tbody>
</table>
2. To search for a ticket, enter the ticket number, ticket status, or a group of words contained in the Subject, Request Details, or Notes, and then click Search. The Ticket History page displays a list of tickets that match the search criteria. A blue dot next to the ticket number indicates that the ticket was updated by the tech (the person responsible for resolving issues), and you have not viewed the new information.

3. To sort the list of tickets, click a column heading to sort by the values in that column. Click the column heading again to reverse the sort order.

Add information to a ticket using the Web console

You can add information to a ticket by adding notes or attaching files.

1. Locate the ticket on the Ticket History page.
2. Click the blue ticket number box to display the ticket details.
3. To add a note, click Add Note and enter the note text.
4. To attach a file, click Add File and select the file.
5. Click Save.
   Your changes are saved and the assigned tech is notified.

Add notes to a ticket using email

Web Help Desk can send emails when a change is made to your ticket. For example, if a tech needs additional information, the tech can add a note to describe the required information and Web Help Desk sends an email to request it. You can add a note to the ticket from the email.

1. Click the Add Note link in the body of the email.
   
   | Do not reply to the email. |
   |
   | A new email is created. |
   |
   2. Replace the text in the body of the email with the note you want to add, and send the email.
   Web Help Desk automatically updates the ticket and notifies the assigned tech that new information is available.

Cancel a ticket

If you no longer need the requested service, you can cancel the ticket.

1. Locate the ticket on the Ticket History page.
2. Click the blue ticket number box to display the ticket details.
3. Click the Cancel Ticket button.
4. Click OK at the confirmation message.
   The ticket status is changed to Canceled and the assigned tech is notified.
Closing a ticket

When the assigned tech resolves your request, Web Help Desk sends you an email. The email contains notes to describe what was done to resolve the reported issue, or what was provided to complete your service request.

- If you are satisfied with the resolution, click Yes to close the ticket. Then click Send to send the generated email. You will receive an email confirmation that the ticket is closed.
- If you are not satisfied with the resolution, click No to notify the assigned tech. Then click Send to send the generated email.

Getting additional help from FAQs

Frequently asked questions (FAQs) describe common IT issues and their solutions. Techs can create FAQs to help users find answers and resolve problems. To display the FAQs:

1. Click FAQs in the Web Help Desk toolbar.
2. Specify the search criteria at the top of the window.
3. Click Search.
   The FAQs that meet your search criteria are listed.

To display the answer to a question, click Show Answer. To indicate whether the FAQ was helpful, click Vote and select a rating of 1 through 5 stars (5 being most helpful, 1 being least helpful). This feedback helps Web Help Desk improve the quality of the FAQ entry.
Beyond getting started with Web Help Desk

Now that Web Help Desk is up and running, check out the Web Help Desk Administrator Guide to customize your deployment. Additionally, the Web Help Desk Documentation website contains additional documentation and training resources to help you get started.

Additional resources

The following table provides additional resources to help you move beyond getting started.

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<th>Go To...</th>
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<td>&quot;Create and edit reports&quot; in the Web Help Desk Administrator Guide</td>
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<td>Create a ticket approval process</td>
<td>How approval processes work</td>
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<td>Hidden a request type from techs and clients</td>
<td>Archive a request type</td>
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<td>Add a unique checklist to each ticket</td>
<td>Create a ticket checklist</td>
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<td>Create a ticket checklist template and assign the template to a request type</td>
<td>Create a ticket checklist</td>
</tr>
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<td>Create an FAQ</td>
<td>Knowledge-centered support</td>
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<td>Automate your Web Help Desk tickets using action rules and tasks</td>
<td>How ticket automation works</td>
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<td>Integrate Web Help Desk with NCM, NPM, and SAM on the Orion Platform</td>
<td>SolarWinds Orion alert integration</td>
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<td>Generate Web Help Desk tickets from Orion Platform alerts</td>
<td>Combining SolarWinds products in your IT environment</td>
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<td>Participate in discussions with SolarWinds professionals</td>
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<td>Get help resolving issues</td>
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<tr>
<td>Learn more about SolarWinds products</td>
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