



Kaseya 2

Kaseya Service Desk

User Guide

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About Kaseya

Kaseya is a global provider of IT automation software for IT Solution Providers and Public and Private Sector IT organizations. Kaseya's IT Automation Framework allows IT Professionals to proactively monitor, manage and maintain distributed IT infrastructure remotely, easily and efficiently with one integrated Web based platform. Kaseya's technology is licensed on over three million machines worldwide.

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What's New

New Features in Service Desk (v1.3.0.0) – April 26 2011

Organization Tickets

A new **Organization Tickets** (*page 31*) page displays all tickets associated with a selected organization. The following types of information are displayed in tabbed format, by organization.

- General - Displays general information about an organization.
- Custom Fields - Displays custom fields and their values defined for an organization.
- Machine Groups - Displays the machine groups of an organization.
- Departments - Displays the departments of an organization.
- Staff - Displays the staff members of an organization.
- Secured Data - Stores data that remains encrypted in the database. For example, you could store the password necessary to connect to a customer's remote website.
- Tickets - Lists and accesses tickets associated with an organization.

Clicking the OrgID hyperlink of a ticket within the ticket editor displays similar information.

Time Tracking

Time entries in **Time Tracking** (*page 14*), Service Desk and Service Billing are now integrated. You can optionally report hours worked and add notes to Service Desk using:

- Timesheets - Timesheets must be enabled.
- Timers displayed in the upper-right corner of the VSA - Timers must be enabled.
- Timers displayed in the ticket editor - Enabled if "session timers" are enabled by desk definition and by user role. You can always use timesheet entries and the timers displayed in the upper-right corner of the VSA to add time entries to a Service Desk ticket, regardless of whether "session timers" are displayed within the ticket editor.

Time tracking logging options in Service Desk now include:

- Auto-clock logging based on how long a ticket or task has been opened by the user.
- Starting and applying a timer to a ticket or task, from either inside or outside of the ticket.
- Creating a time entry in the Time Tracking module and linking it to a ticket or task.
- Manual entry of hours worked to a ticket or task.

Whatever method is used, the hours worked can be forwarded to Service Billing for billing and viewed in timesheets in the Time Tracking module.

Task Information

Task Information (*page 17*) organizes a Service Desk ticket into a series of steps. Each task can be assigned a different assignee and tracked individually for completion. If Task Information is enabled:

- Tasks can be edited using a separate Tasks tab in the ticket editor.
- All tasks for all tickets can be listed, sorted, filtered, searched and viewed using the **Tasks Associated with Tickets** page, restricted by a user's selected scope.
- You can add notes and hours worked, including billable hours, by individual task.
- All user entered notes, for both tickets and tasks, are viewable in ticket notes.
- Task notes and task hidden notes each have a unique background color to distinguish them from other kinds of notes in the note history of a ticket.

For any one service desk, Task Information and Service Billing Integration are mutually exclusive.

Service Billing Integration

The **Service Billing Integration** (*page 18*) enables hours worked in a Service Desk ticket to be billed in the Service Billing module. Tickets associated with a Service Billing customer are listed in the Customer Billing > Customers > Tickets tab. Billable time can

What's New

	<p>be for the entire ticket or by specific task.</p> <p>The following fields have been added to the standard product and can be used with or without Service Billing Integration.</p> <ul style="list-style-type: none">• Estimated hours - Can be manually entered, aggregated from tasks or via procedure.• Actual hours - Aggregated from tasks or time logged against the ticket.• Billable - Serves as a reference only field in Time Tracking even if Service Billing Integration is not enabled. <p>The following fields display if Service Billing Integration is enabled.</p> <ul style="list-style-type: none">• Resource Type - Associates an Hours Worked time entry with a resource type, which can either be a skill, a material or a cost. Used to classify labor entries.• Standard Rate - Associates an Hours Worked time entry with the standard rate defined for the resource type.• Override Rate - Enables overriding the standard rate for an Hours Worked time entry.• Work Order and Work Order Line - Links an Hours Work time entry to a work order line in Service Billing.• Billable - Forwards an Hours Worked time entry to Service Billing for billing. <p>For any one service desk, Task Information and Service Billing Integration are mutually exclusive.</p>
Desk Definition	<p>The page layout of the Desk Definition page has been changed to a horizontal format.</p> <ul style="list-style-type: none">• General properties for a desk display in columns from left to right in an upper pane.• Tabbed property sheets display in a lower pane. <p>The following new check boxes have been added to the General Info (page 37) tab.</p> <ul style="list-style-type: none">• Enable Incident Notes Panes - If checked, an extra pane with two tabs displays below the tickets table showing the selected ticket's Description and Notes.• Enable Service Billing Integration - If checked, billable entries can be created using the Service Billing module and billed in Service Billing. Hidden if Service Billing Integration is not enabled.• Enable Session Timers - If checked and Auto Save Clock is not checked, timer buttons display in the ticket editor.• Enable Task Information - If checked, the Task tab displays in the ticket editor. Hidden if not enabled.
Add Note	<p>The Add Note Dialog (page 28) enables you to add a note to a ticket without opening up the entire ticket for editing. Click the New button to see Add Note as a sub-option. This option displays the Add Note dialog. The <code>fixed_width_tabbed</code> and <code>fixed_width_no_tabs</code> editing templates both demonstrate this feature.</p>
Copy Ticket	<p>Copy Ticket (page 21) now inserts a hidden note in the target ticket with the source note information</p>
Popup Edit Window for Description Field	<p>When the Description (page 24) field in the General tab of the Ticket Editor is double-clicked, it displays in a separate window, enabling you to move and resize the window as you edit it.</p>
Read/Unread Status	<p>When a note is added to a ticket, the Read/Unread flag is reset to Unread for all other users.</p>
Worked Perform On	<p>A new Work Performed On (page 24) field displays in the General tab of the ticket editor. This property can be set or tested in service procedures.</p>

Global Settings	<p>A new Global Settings (page 56) page has been added for options that apply to the entire Service Desk module.</p> <p>The Activate option previously located on the Setup page of KSD 1.2 has been moved to this page.</p> <p>This page also sets background colors for different types of notes displayed in the ticket editor.</p> <ul style="list-style-type: none"> • Hidden Note Color - Hidden ticket notes do not notify the submitter by email and hide the note from machine users viewing the ticket using Portal Access. • System Note Color - A note created by a system event, such as the start of a service procedure. • Task Note Color - A note created for a task within a ticket. • Hidden Task Note Color - Hidden task notes do not notify the submitter by email and hide the note from machine users viewing the ticket using Portal Access. • Normal Note Color - The color displayed by public notes for the entire ticket.
Desk Templates	<p>The Setup page has been renamed the Desk Templates (page 44) page. Two desk templates have been re-configured and renamed.</p> <ul style="list-style-type: none"> • <code>Customer_SD_Basic</code> - Provides a turn-key solution to get you started. There is a simple workflow and no automation. • <code>Customer_SD_Automation</code> - Create a Customer Support desk with minimal automation. This desk provides a simplified workflow that demonstrates automation for email and message notification to users. It integrates use of pools, message templates and procedures.
Message Templates	<p>A new set of Message Templates (page 51), all identified with a CS prefix have been created in support of the <code>Customer_SD_Basic</code> and <code>Customer_SD_Automation</code>.</p>
Role Preferences	<p>Promise date has been added to Role Preferences (page 58) as a date range option for highlighting tickets in the ticket table (page 19) by color.</p> <p>Two new options can be selected by user role.</p> <ul style="list-style-type: none"> • Enable Session Timers - If checked and Auto Save Clock is not checked, a Timer button displays in the ticket editor. • Show Task Information - If checked, the Task tab displays in the ticket editor. <p>In addition field permissions can be set for the following new fields if Service Billing Integration is enabled.</p> <ul style="list-style-type: none"> • Work Order • Activity • Resource Type • Standard Rate • Override Rate
User Preferences	<p>Promise date has been added to User Preferences (page 60) as a date range option for highlighting tickets in the ticket table by color.</p> <p>A new Service Desk tab enables you to select your "favorite" ticket editing template. You can specify a favorite editing template for each desk definition. This selection overrides the editing template preference set using the Service Desk > Role Preferences - Service Desks tab.</p>
Inbound Email	<ul style="list-style-type: none"> • An email reader (page 62) can now poll an IMAP email server. Previously, email readers in Service Desk were limited to POP3 email servers. • If the "from" address of the inbound email matches the email of a staff record in the VSA, the staff member and the staff member's organization is associated with the ticket. This applies if the email has not already been associated with a staff member or organization using ticket tagging or a mapping procedure.
Added Property Variables	<p>The following property variables (page 52) have been added. These can be used in</p>

message templates and service procedures.

- [ActualTaskHours\$] - The total number of hours while working on tasks within a ticket.
- [AgentGuid\$] - When a ticket is associated with an agent, this is the unique ID of the agent.
- [EstimatedTaskHours\$] - The estimated number of hours for all tasks within a ticket.
- [ExpectedDueDate\$] - The goal date for the entire ticket.
- [LastPublicUpdate\$] - The time that a non-hidden note was last added to the ticket.
- [ProjectedDate\$] - The date a customer service representative has promised a problem will be resolved.
- [StaffPhone\$] - Displays the contact's phone number.
- [SubCategory\$] - The subcategory for the ticket.
- [TotalHoursWorked\$] - The total hours worked on the ticket.
- [WorkOrder\$]
- [WorkOrderName\$]
- [WorkOrderNumber\$]
- [WorkPerformedDateTime\$]

Service Procedures

Service procedures now display a **Used By** (page 69) tab that tells the administrator where the procedure is referenced.

The following **Service Desk procedure commands** (page 77) have been added.

- Is Within Coverage - Tests whether a ticket or KB article is currently within the coverage schedule.
- Execute SQL Non-Query - Executes an SQL non-query command on the Kaseya Server SQL Server database.
- Execute SQL Select Query - Executes an SQL select query command on the Kaseya Server SQL Server database.
- Get Agent Property - Returns a selected property value from the last audit of the agent machine associated with the ticket.

Import Center

The Import Center in the System module can import and export service desks, service desk tickets, message templates and holidays.

Service Desk and SaaS

Service Desk has been integrated with SaaS.

Service Desk API

The **Service Desk API** (page 95) has been updated to support these new features.

See *Release Notes* (<http://help.kaseya.com/WebHelp/EN/KSD/1030000/link.asp?ksd-release-notes>) for the complete history of this product's release notes.

Service Desk Overview

Welcome to Service Desk!

The **Service Desk** module manages an organization's response to a support issue. A support issue may be a question, a problem, a request for service, or a suggestion for a future enhancement.

Before you begin your implementation of **Service Desk** we recommend you review all the overview topics listed in this section, to orient yourself to the **Service Desk** structure and design.

- **Planning for Service Desk** (page 5)
- **Automation in Service Desk** (page 5)
- **Service Desk User Security** (page 9)

- [Integration Options in Service Desk](#) (page 12)

Additional Resources

Service Desk demos, training, documentation, and Kaseya Professional Services consulting are all available to help quickstart your implementation of **Service Desk**.

Planning for Service Desk

Here are some issues to consider when planning the implementation of **Service Desk**:

- Who are the users and what are their roles?
- What resource pools should you define? Resource pools are groups of technicians allocated to different areas of specialization.
- What is the life cycle, or workflow, of a ticket? Ticket workflows are defined using stages.
- Should tasks be used to track assignments required to close a ticket?
- What ticket properties are required? What values are allowed for each property? What are their default values?
- What ticket property access permissions should be assigned, by role and by user?
- What ticket list view preferences should be defined? Which columns should display? Conditional formatting enables you to set color shading and highlighting based on ticket creation, modification, or due date. What predefined filters should be defined?
- What are your service goals: response time, time to resolution, etc.?
- Will you provide more than one service level?
- What are your ticket sources: manual creation, incoming email, monitoring, etc.?
- What are your addresses for incoming email?
- What is your criteria for detecting duplicate monitoring alerts?
- What automation would be beneficial for different events and conditions: ticket created, ticket changed, stage entry/exit, escalation based on elapsed time in current stage and ticket age?
- What level of end-user communication is desired?
- What templates would be useful for email notifications and inserting notes into the ticket history log?
- What are your knowledge base requirements?
- What reporting and metrics are desired?
- Are you tracking time spent on tickets for billing purposes?
- At what point should you **activate** (page 56) the creation of **Service Desk** tickets from alarms instead of **Ticketing** tickets.

Automation in Service Desk

Service Desk provides automation for the processing of tickets as follows:

- [Automated Processing Using Service Procedures](#) (page 5)
- [Automated Processing Using Policies](#) (page 7)
- [Automated Processing Using Inbound Emails and Alerts](#) (page 9)

Additional automation is available using one or more [integration options](#) (page 12).

Automated Processing Using Service Procedures

Automatic processing of tickets in **Service Desk** can be triggered by the creation of the ticket record

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itself or the transition of the ticket to a "stage" in its lifecycle. Automatic processing can be triggered each time a ticket progresses to *any* stage. This includes the *first* stage, when a ticket is created. Automatic processing can also be triggered if a ticket remains in a stage beyond some time limit that you define. Stages are defined in Service Desk > **Desk Definition** (page 35). **Service Desk** procedures and can also trigger the running of an agent procedure on a managed machine using the **scheduleProcedure()** (page 88) step.

See **Procedures Definition** (page 68) for more information about procedures.

How Stages Work

Stages are designed to model the flow of work a business performs to process support issues. They are defined by desk definition. One stage is defined as a **Begin** stage and one stage is defined as an **End** stage. There are usually several **Middle** stages.

Stages are *sequenced* by selecting one or more "to" stages. The sequence of stages is user-defined. It depends on the policies defined by the service organization and the judgments of individual users using the system. A sequence of stages is graphically represented by the **View** (page 41) tab within a desk definition.

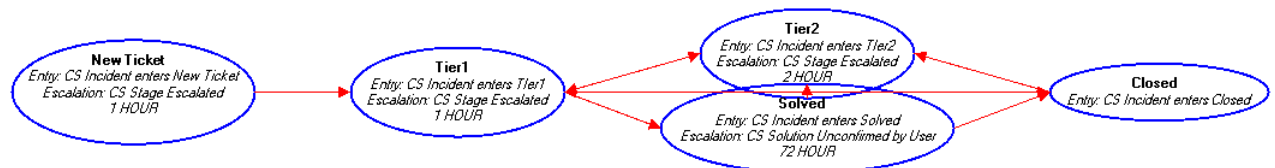
An **event procedure** runs as soon as a ticket transitions from one stage to the next. A **scheduled procedure**, such as an escalation procedure, is triggered to run based on how long a ticket remains in a stage. Escalation procedures run when a system event *does not occur* within a specified time period.

When a desk definition is created, stage sequences are populated by the *template* used to create the desk definition. Once a desk definition is created based on a template, these default stages can be modified to suit your business requirements.

Example - The Stages of Customer_SD_Automation

The description of each stage below assumes the VSA users discussed are *not* **Service Desk administrators**, and so have their views of tickets *limited by their user role and scope*.

Note: See the **Desk Templates** (page 44) topic for instructions on how to create this and other predefined service desks automatically.



New Ticket - A newly created ticket in Customer_SD_Automation starts out in the New Ticket stage.

- A CS Incident enters New Ticket stage entry procedure assigns the ticket to a Tier1Support pool of service ticket technicians. VSA users see any tickets assigned to them, plus any tickets assigned to pools they belong to.
- A VSA message and an email message is created for these same users. The submitter of the ticket is also sent an acknowledgment email that a ticket has been created.
- An escalation procedure is linked to this stage. If the ticket has not been moved out of the CS Incident enters New Ticket stage within 1 hour, the escalation procedure runs. The escalation procedure notifies the assignee of the ticket and the Tier1Support pool of users. The intent of the escalation procedure is to ensure that all newly created tickets are reviewed immediately.

Two other factors can automate the behavior of tickets at any stage:

- **Automatic Ticket Assignment from a Pool** - The first time the ticket is opened by any member of the Tier1Pool, that member is assigned the ticket. Other members of the Tier1Pool no longer see the ticket in their view of tickets.

- **Ticket is Changed** - This not a stage, but a **Ticket Change** (page 73) procedure. The same `CS Incident is Changed` procedure is run each time the ticket is saved, even if a minor change to the ticket does not include switching the stage. This ticket change procedure tests for the following:
 - If the ticket is new, the ticket is immediately moved to the `Tier1` stage.
 - If the ticket has an assignee, the assignee also becomes the "owner" of the ticket. An owner of a ticket typically continues to be responsible for the ticket, even if the ticket is assigned to a series of different assignees over the course of its life cycle. Ticket views can be filtered by owner, enabling owners to manage tickets that may have been forgotten about by their current assignees.
 - If the ticket has been solved, the ticket is closed.
 - If a ticket was already closed, but a customer sends an email referencing the ticket, the ticket is reopened.

Tier1 - The assignee of the ticket is now tasked with working with the ticket in the `Tier1` stage.

- The assignee is sent an email message.
- An escalation procedure is also linked to this stage.
- A ticket can be manually assigned to either the `Tier2` stage or the `Solved` stage, as indicated by the two red arrows coming out of the `Tier1` bubble in the graphic above.

Tier2 - Moving a ticket to the `Tier2` stage typically means the ticket requires a person with more experience to resolve it, perhaps providing a special area of expertise.

- A `CS Incident Enters Tier2` stage entry procedure automatically assigns the ticket to a `Tier2Pool` of users, so that `Tier1` personnel don't have to guess who to assign it to.
- A VSA message and an email message is created for these same users. The submitter of the ticket is also sent an acknowledgment email that the ticket has been assigned to the `Tier2Pool` for further investigation.
- An escalation procedure is also linked to this stage.

Solved - Resolved tickets are sent to this stage to wait for acknowledgment back from the submitter after being notified.

- The `CS Incident Enters Solved` stage sends the submitter an email notification that the ticket has been resolved.
- Solved tickets are either re-opened when the customer sends back an email reply, or the customer is never heard from again. Eventually the ticket is manually closed.

Closed - Resolved tickets are set to the `Closed` stage.

- The `CS Incident Enters Closed` stage entry procedure notifies the submitter of the ticket that the ticket is closed.

Automated Processing Using Policies

You can apply different values to the fields within a ticket and automate the processing of that ticket differently, based on the **policy** assigned to that ticket. *Each desk definition can be associated with any number of different policies.*

Note: The **Desk Templates** (page 44) page provides instructions on how to create an ITIL-based `Incident service desk`. The `Incident service desk` incorporates the automation features described in this topic.

Configuring Policies

A policy can be assigned to a ticket at the time a ticket is created manually, or automatically based on an **inbound email or alert** (page 9). The policy selected can be based on rules set up for matching the organization name, organization type or machine group of a ticket using Desk Definition > Processing > **Associated Policies** (page 42).

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The policy can also be assigned to a ticket at any time using a procedure.

The automatic processing of new tickets is based on four interlocking tables of information:

- Procedure Variables
- Policies
- Policy Variables
- Associated Policies

Variables

A variable name and default value must be defined first, before it can be used as a **policy variable**.

Policies

A selected policy defines two types of information: **hour of coverage** and **policy variables**. The system includes hours of coverage when calculating escalation and goal times.

Policy Variables

Policy variables represent an important link in automating the processing of new tickets using policies. Each policy can be assigned one more variables with a default value. Once a policy is selected and applied to a newly created ticket, the values of any of the policy's variables can be interpreted by a procedure.

Associated Policies

The assignment of a policy to a ticket is based on the **Associated Policies** table defined in a desk definition. A single record in the **Associated Policies** table represents an association of *one* policy and any *one* of the following types of information: an **organization**, an **organization type**, or a **combination of machine group and operating system**. Multiple policy associations can be defined in this table. As a ticket is created, based on a specified desk definition, one or more of these three types of information can be entered *before the ticket is saved the first time*. Based on the three types of information entered, a corresponding policy "rule" is selected from the **Associated Policies** table and applied to the ticket. A default policy is selected if none of the three types of information is entered with the new ticket. This default is defined using the Desk Definition > Edit > **Standard Field Defaults** (page 38) tab. If there is no default policy for a definition, the system assumes a coverage schedule of 7x24.

For example, assume many different organizations are all generating tickets *using the same desk definition*. Several organizations can be defined that have all purchased **Diamond** service coverage. A second set of individual organizations have purchased **Gold** service coverage, and so on.

Alternatively, these same policies could be selected and applied to tickets using organization types or machine group classifications instead.

Once each new ticket is assigned the appropriate policy, based on the **Associated Policies** table, procedures can be run that automatically act on the new ticket.

Procedures

Recall that one or more policy variables can be associated with each policy. IF-ELSE procedures can be written that *interpret the value of a policy variable assigned to a ticket*. Doing so enables a procedure to customize the settings of that ticket. Typically, this procedure would be run as a **Stage Entry or Exit** procedure, and be associated with the first stage of a ticket, which is usually called **New**.

For example, assume that a **Diamond** policy is associated with the organization **Walmart** and should always be prioritized as **High**. Instead of requiring service representatives to enter this information manually, you can create a procedure that always ensures this important customer receives the highest possible priority. Additional IF-ELSE branches can automatically set the properties of any of your other new tickets, including **Status**, **Priority**, **Severity**, **Category** and **Resolution**. The same procedure can also trigger outbound email and message notifications, add notes to the ticket, and even execute additional procedures as appropriate.

Note: Automatic processing of manually created tickets occurs only after you save the ticket.

Automated Processing Using Alerts and Inbound Emails

You can configure and automate the processing of new tickets *using alerts and inbound emails*.

Creating New Tickets Automatically from Alerts

Almost all alerts throughout the VSA include the option of automatically creating tickets. In addition there are links in various functions that enable you to manually create a ticket. To process these ticket-creation links into **Service Desk** tickets:

- The **Service Desk** module must be installed.
- The **Service Desk** module must be *activated* (page 56).
- Incoming Email and Alarm Settings must be *enabled* (page 61).

Creating New Tickets Automatically from Inbound Emails

Automatic creation and processing of tickets can be based on inbound emails. Service Desk > **Incoming Email and Alarm Settings** (page 61) specifies an email account to periodically poll. The body of the incoming email can contain a number of special fields of the form `~field="value"` that can be used to set various properties of the incoming ticket.

Email messages retrieved from the email server can be classified using a **Ticket Request Mapping** (page 73) procedure and converted into different types of tickets. The **Ticket Request Mapping** procedure uses IF-ELSE logic to interpret the email sender's *domain* or *domain/username* and determine how a newly created ticket should be processed. This includes selecting the appropriate desk definition, creating outbound emails and messages, adding notes, and executing additional procedures as appropriate.

Service Desk User Security

Note: When you create a pre-defined service desk using the Service Desk > **Desk Template** (page 44) page, much of the user security issues described in this topic are configured for you.

Note: See System > **User Security** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?4575.htm>) for an introduction to VSA user security concepts mentioned in this topic.

Access to desk definitions, tickets, and KB articles comprise five levels of user security:

- Role Types
- User Roles
- Users
- Scopes
- Field Permissions

Note: Machine roles and **Service Desk** are discussed in a separate topic, **Integrating Service Desk, Live Connect, and Portal Access** (page 13).

Role Types

Kaseya licensing is purchased by role type. There are separate role types for licensing users by *user role type* and licensing machines by *machine role type*. Each role type enables selected functions listed in the User Roles > Access Rights tab and Machine Roles > Access Rights tab. The number of role type licenses purchased displays in the System > License Manager > Role Type tab. Each role

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type license specifies the number of *named users* and *concurrent users* allowed.

User licensing for the **Service Desk** module is purchased and managed using two *user role types*:

- Service Desk Administrators - Equivalent to a Master role user within the **Service Desk** module only.
- Service Desk Technicians - A user who works with tickets and KB articles.

Note: The Master role is assigned the Service Desk Administrators role type by default.

User Roles

Three user roles are created when the **Service Desk** module is installed. These user roles provide three types of function access typically required by **Service Desk** users. You can use them as is, or modify them if you like, or use them as models for creating your own new user roles.

- SD Admin – A **Service Desk** administrator who has access to all **Service Desk** functions and tickets, regardless of scope. An SD Admin can create and edit desk definitions, configure **Service Desk** support tables and **Service Desk** procedures, and perform all actions on tickets. Only SD Admin users have access to advanced functions in the Service Desk > Tickets table such as **Delete**, **Unlock**, **Export** and **Import**. Like a Master role user, an SD Admin user is not limited by *field permissions*, described below. This user role is a member of the Service Desk Administrators role type.
- SD User – A **Service Desk** user who works with **Tickets**, **Archived Tickets**, **Search All** and **User Preferences**. This role does not permit access to desk definitions, procedures or any other support tables. This user role can only *view* published KB articles, but cannot create or edit KB articles. This user role is a member of the Service Desk Technicians role type.
- KB Admin – A **Service Desk** administrator who creates, edits and manages KB articles. The KB Admin user has access to all **Service Desk** functions. This user role is a member of both the Service Desk Administrators and Service Desk Technicians role type.

Users

A VSA user only has access to the **Service Desk** module and functions by assigning that VSA user to a user role using the Service Desk Administrators or Service Desk Technicians role type.

Scopes

Scopes and Service Desks

The following applies to a VSA user using a role that is linked to the Service Desk Technicians role type and that same role is not linked to the Service Desk Administrators role type.

- Assigning a desk definition to a scope using System > **Scopes** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?4578.htm>) provides:
 - Visibility and selection of the service desk in drop down lists in **Service Desk**.
 - Visibility and selection of service desk tickets in ticket tables.
- Scope access only provides *visibility* of tickets. Further access to *editing* tickets is determined by role *field permissions*.

Note: See **Visibility of Service Desk Tickets by a Staff Member** (page 12) for an alternate method of making tickets visible to staff members.

Scopes, User Roles and Knowledge Base Desks

The following applies to a VSA user using a role that is linked to the Service Desk Technicians role type and that same role is not linked to the Service Desk Administrators role type.

- Knowledge base desks do not need to be added to any user role or any scope for KB articles to be visible to VSA users using those roles and scopes.
- If you are using the pre-configured KnowledgeBase desk, any KB articles set to the Published stage are visible and viewable for all service desk users and machine users in Live Connect, regardless of user role or scope. The same is true for any knowledge base desk created from scratch, so long as the KB article is set to the End stage, whatever the name of that End stage.
- If you want non-service desk administrators to be able to create a new KB article and edit the KB article, but don't want those same users complete service desk administrator access, select or create a user role associated with the Service Desk Technicians role type. Then associate the knowledge base with the user role using Role Preferences (page 57) or the Desk Definition > Access > Roles (page 43) tab. Then assign users to that user role. The KB Admin user role can be used for this purpose. The KB Admin is already associated with the KnowledgeBase desk. You only need to remove the Service Desk Administrator roletype from the KB Admin user role.

Field Permissions

Field permissions are set by role. For VSA users using roles linked to the Service Desk Technicians role type, field permissions determine what fields a user can view or edit within the ticket editor or KB article editor. Typical field permissions include: Editable, View Only, Hidden, or Required. Default field permissions are set by editing template (page 119).

Note: VSA users using a role linked to the Service Desk Administrators role type can see and work with any field in any ticket editor or KB article editor. Master role users also always have complete field permission access, regardless of roletype assignment.

Editing Templates

An editing template serves three purposes:

1. The editing template defines the layout of the dialog used to edit a ticket or KB article.
2. An editing template may mask selected fields, even though the fields are defined by the desk definition. Using an editing template to mask a field overrides whatever field permission is set for that field.
3. The editing templates also sets default field permissions (page 120) for editing a ticket or KB article. Whether assigned by role or by user, you can override the default field permissions set by the editing template to suit your business requirements.

An editing template is applied to a combination of desk definition and user role (or machine role) using Role Preferences (page 57) or the Desk Definition > Access > Roles (page 43) tab. An editing template can also be applied to a combination of desk definition and user using User Preferences (page 60). User Preferences has precedence over Role Preferences. The default editing template for all roles and all users working with a service desk is specified in the Service Desk > Desk Definition > New or Edit > General Info (page 37) tab.

Default Field Permissions

Portal Access users (machine users) (page 13) use ticket field level permissions defined for the Default machine role. The Default machine role also applies to VSA users using a user role that does not include either the Service Desk Administrator or Service Desk Technician roletype. When a VSA user is using the Default machine role to view or edit a ticket, a Default Permissions Apply message displays at the top of a service desk ticket. If even the Default machine role does not provide access to a ticket, then an error message tells the user their role does not permit access to the ticket.

Visibility of Service Desk Tickets by a Staff Member

If a VSA user name is associated with the staff member record of an organization, then that VSA user has visibility of tickets associated with that staff member record *even if the VSA user's scope does not allow it*. Any tickets created by that VSA user are automatically associated with their staff member record and organization. This method primarily supports machine users using Portal Access to create and manage their own tickets. Machine users expect to have access to all the tickets they create and to any tickets created on their behalf, but may have no scope privileges defined for them. If a scope does exist for a VSA user associated with a staff member, checking the checkbox called **View all tickets** in the staff member record provides visibility of those additional tickets by scope.

Example: Dale is the main customer contact for the XYZ organization. He is provided a scope that allows him to see all tickets related to his organization, even tickets not created by him, so the **View all tickets** checkbox is enabled. Brandon from the XYZ organization contacts the service desk to submit a ticket as well. Initially it's unclear whether Brandon should have access to any other tickets beyond the tickets he himself creates, so the **View all tickets** is left unchecked. Later, if Dale okays greater access for Brandon, the service desk provider can assign a scope to Brandon and check the **View all tickets** checkbox.

Sharing User-Owned Objects in Service Desk

Service Desk Procedures - Unlike agent procedures, **Service Desk** procedures are always created in *shared* folders.

Named Filters - Named filters in **Tickets** (page 19), **Knowledge Base** (page 33) and **Search All** (page 34) always start as private, but can be shared.

Note: See Agent Procedures > **Folder Rights**

(<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?4673.htm>) for an introduction to sharing rules in folder trees.

Note: See System > **Sharing User-Owned Objects**

(<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?5537.htm>) for an introduction to sharing user-owned objects.

Integration Options in Service Desk

Service Desk can be integrated with several other Kaseya modules. The following are standard options.

- **Migrating Tickets from the Ticketing Module** (page 13)
- **Integrating Service Desk and Live Connect** (page 13)
- **Time Tracking and Service Desk** (page 14)
- **Task Information** (page 17) - Enables the creation and management of *tasks* within a **Service Desk** ticket.
- **Service Billing Integration** (page 18) - Enables hours worked in a **Service Desk** ticket to be *billed* in the **Service Billing** module.

Note: The **Service Billing Integration** and **Task Information** options cannot be used together within the same service desk.

Migrating Tickets from the Ticketing Module

You can migrate tickets from the **Ticketing** module, as well as import **Service Desk** tickets into the **Ticketing** module.

Migrating Tickets from Ticketing into Service Desk

The paging area of **Migrate Tickets** displays all the tickets visible to you in the Ticketing > View Summary page.

1. Select the tickets you want to migrate in the paging area. Click **Select All** to select all tickets.
2. Click **Migrate** to migrate all the selected tickets into **Service Desk**.

Importing Service Desk Tickets into Ticketing

1. Export selected tickets in **Service Desk** to an XML file on your local machine or network, using System > **Import Center** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?6963.htm>).
2. Click **Import** in Ticketing > **Migrate Tickets** and select the XML file you created in step 1 above.

Integrating Service Desk, Live Connect and Portal Access

One of the functions provided by **Live Connect** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?4796.htm>) or **Portal Access** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?438.htm>) is the ability to see all tickets associated with a selected machine. By default, the tickets displayed by **Live Connect** and **Portal Access** are for the **Ticketing** module only. Once **Service Desk** is installed and **activated** (page 56), the **Ticketing** function in **Live Connect** and **Portal Access** displays **Service Desk** tickets only.

When **Live Connect** and **Portal Access** are integrated with **Service Desk**, the **Ticketing** function displays two tabs: one tab for tickets and a second tab for KB articles. Working with tickets and KB articles within **Live Connect** and **Portal Access** is similar to working with them using the **Service Desk** module in the VSA.

Prerequisites

- The **Service Desk** module is installed.
- Agents are already installed on managed machines.

Configuration

1. Create a desk definition and knowledge base definition. The easiest way to do this is to use Service Desk > **Desk Templates** (page 44) to create sample definitions and modify them to suit your preferences.
2. Create a ticket in **Service Desk** associated with a specific machine ID account you can use to test with.
3. Create a KB article. KB articles are not associated with specific machines.
4. For KB articles created using the pre-configured KnowledgeBase desk, set any KB articles to the `Published` stage to make them visible to **Live Connect** and **Portal Access** users. If you created your knowledge base definition from scratch and want to display its KB articles to **Live Connect** and **Portal Access** users, then those KB articles must be set to the `End` stage, whatever the name of that `End` stage.
5. Configure the `Default` machine role.
 - Ensure your created service desk and knowledge base definitions are assigned to the `Default` machine role using Service Desk > **Role Preferences** (page 57).
 - Ensure machine IDs using **Live Connect** and **Portal Access** are assigned to the `Default` machine role using System > **Machine Roles** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?4827.htm>).

Service Desk Overview

- Ensure the **Function Access** tab for the `Default` machine role shows the **Service Desk** functions enabled.

Note: If you create an additional machine role for machine users, repeat step 5 for this machine role.

6. Assign any desk definitions you want visible to Live Connect and Portal Access users to the `Anonymous` scope using **System > Scopes** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?4578.htm>).
7. **Activate** (page 56) **Service Desk** using **Service Desk > Global Settings** (page 56).

Using Live Connect with Service Desk as a VSA User

1. Click the agent check-in icon next to a machine ID to display the **Live Connect** page.
2. Click the **Ticketing** function to display the **Service Desk** tab and **Knowledge Base** tab. You should see any tickets and KB articles created within the VSA that are associated with this machine ID.
3. Create one or more tickets within **Live Connect**. You cannot create KB articles as a **Live Connect** machine user.
4. As a VSA user in the **Service Desk** module, you should see the tickets created as a **Live Connect** user for this machine ID, assuming your current scope includes this machine ID and service desk.

Using Portal Access and Service Desk as a Machine User

1. Click the agent icon in the system tray of the managed machine to display the **Portal Access** page.

Note: When a machine user uses Live Connect, it is called the **Portal Access** page.

2. Click the **Ticketing** function to display the **Service Desk** tab and **Knowledge Base** tab. You should see any tickets and KB articles created within the VSA that are associated with this machine ID.
3. Create one or more tickets within **Portal Access**. You cannot create KB articles as a **Portal Access** machine user.
4. As a VSA user in the **Service Desk** module, you should see the tickets created by the **Portal Access** user of this machine ID, assuming your current scope includes this machine ID and service desk.

Time Tracking and Service Desk

You can optionally report hours worked and add notes to **Service Desk**:

- **Using Session Timers in the Ticket Editor** (page 14) - Requires "session timers" be enabled by desk definition and by user role.
- **Using System Timers with Service Desk** (page 15) - Requires timers be enabled. See **Time Tracking > Configuring Time Tracking** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?7164.htm>).
- **Using Timesheets with Service Desk** (page 16) - Requires timesheets be enabled. See **Time Tracking > Configuring Time Tracking** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?7164.htm>).

Using Session Timers In the Ticket Editor

Enabling "Session Timers"

1. Ensure **Enable Session Timers** is checked for a service desk using **Service Desk > Desk Definition > New / Edit > General Info** (page 41) tab.
2. Ensure **Enable Session Timers** is checked for a user role using **Service Desk > Role Preferences** (page 57).

Note: You can always use timesheet entries and the timers displayed in the upper-right corner of the VSA to add time entries to a **Service Desk** ticket, regardless of whether "session timers" are displayed within the ticket editor.

Using "Session Timers" in the Ticket Editor

When enabled, the following "session timer" displays in the ticket editor.

- **Start Timer** - Starts a timer associated with the ticket.
 - The ticket does not have to be saved to keep the timer going.
 - You can close the ticket, log out of the VSA, then log back in later. The timer continues to track elapsed time.
 - If a ticket timer is already running and you re-open a ticket in the ticket editor, the **Pause Timer** and **Apply Timer** buttons display. You can now pause or apply the elapsed time.
 - When you start a timer in the ticket timer, it displays as one of the standard timers in the upper-right hand corner of the VSA.
 - ✓ A timer created using the **Start Timer** button in the ticket editor always displays the number of the ticket it is linked to, for example, Ticket CS009345.
 - ✓ You can pause and apply a timer linked to a ticket using the timer controls in the upper-right hand corner of the VSA and the time will be applied to the ticket just as if you did so from within the ticket editor.


Note: If you happen to create additional timers *linked to the same ticket number* using the timer control panel in the upper-right hand corner of the VSA, the timer furthest to the left is the one that is always selected if the ticket is re-opened in the ticket editor. Typically this is the timer that has been running the longest, since timers are created from left to right.

- **Pause Timer** - Pauses the timer associated with the ticket.
- **Apply Timer Time** - Populates the **Hours Worked** field with the elapsed time. You can override the time displayed in the **Hours Worked** field before you save the ticket.


Using System Timers with Service Desk

If timers have been **configured** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?7164.htm>) for your VSA logon use the following procedure.

Create a **Service Desk Ticket** timer entry to add the time to the entire **Service Desk** ticket. You can optionally link the ticket to **Service Billing** records or to a task, if either one of these features is enabled. Time entered displays as a note in the ticket.

1. Click the new timer  icon to add a new timer. Timers are located in the upper right hand corner of the VSA window. The **New Timer** dialog displays. Enter or select values for the following fields.
2. Select a unique **Timer Color**. You can define multiple timers concurrently so it helps to assign them different colors.
3. Enter a **Label** for your timer. The label displays whenever the timer icon is selected and added as a note to any time entry you create from the timer. If blank, the timer is labeled by the work type you select.
4. If **Start of Save** is checked, the time starts running as soon as you save this dialog.
5. Select the **Service Desk Ticket work type** (*page 122*) option.
6. Select the **Service Desk** definition.
7. Optionally select a **Status Filter** to limit the list of tickets displayed in the **Ticket** drop-down list.
8. Select either:
 - **Show All Tickets**

Service Desk Overview

- **Show My Tickets**
9. Select a **Ticket**.
 10. The following fields only display if a service desk is integrated with **Service Billing**. See **Creating Billing Entries using Service Desk** (page 18).
 - **Work Order** - Display only. Displays only if a work order is associated with the ticket on the General tab of the ticket editor.
 - **Work Order Item** - The work order line to associate with the hours worked. Displays only if a work order is associated with the ticket on the **General** (page 24) tab of the ticket editor.
 - **Activity Type** - Labor entries are grouped by **activity type** to analyze the cost and revenue of labor. The classification of activity types typically reflects the accounting requirements of a company. Labor entries are classified by both activity type and **resource type** (page 121). Not editable if a detailed work order is selected.
 - **Resource Type** - A **resource type** specifies a *skill*, *material* or *cost* and sets a default rate for a billable labor item or entry. Typically a resource type represents a skill performed by a staff member. A billing rate and standard cost is defined for each *skill* required to perform the service. The rate can be overridden when selected. Because the labor performed to deliver a service sometimes requires incidental charges for materials and costs, resource types can also be classified as either *material* or *cost*. For example, extra cabling or overnight shipping might be included as additional, billable labor entries, because they are required to deliver the service of installing a server. The classification of resource types typically reflects the production requirements of a company. Labor entries are classified by both resource type and by activity type. Not editable if a detailed work order is selected.
 - **Rate** - The default billing rate for the selected resource type. Display only.
 - **Override Rate** - A manually entered rate that overrides the default billing rate for a selected resource type. Does not display if a detailed work order is selected.
 - **Show Note on Invoice** - If checked, the note is displayed on the printed invoice.
 11. Select a **Task**. This field only displays if **Tasks** (page 17) are enabled for the service desk.
 12. Optionally add a **Note**.
 13. Optionally make the note a **Hidden Note** in the ticket.
 14. **Billable** - If checked, the entry is billable. If **Service Billing** is not installed, the **Billable** checkbox is for reference purposes only. If **Service Billing** is installed the entry is forwarded to **Service Billing**. If timesheets require approval, the timesheet containing this entry must be approved before the entry is forwarded to **Service Billing**.
 15. Click **Save** to close this dialog. The new timer clocks begins recording the time for this activity.
 16. Complete the activity being timed by this timer.
 17. Click the Checkmark  icon to display the **Apply Time** window. You can edit your time entry, including the elapsed time, and either:
 - **Apply and Remove** - Apply your time entry to your timesheet and remove the timer.
 18. **Apply and Reset** - Apply your time entry to your timesheet and reset the timer to 0.

Using Timesheets with Service Desk

If timesheets have been **configured** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?7164.htm>) for your VSA logon use the following procedure.

Create a **Service Desk Ticket** timesheet entry to add the time to the entire **Service Desk** ticket. You can optionally link the ticket to **Service Billing** records or to a task, if either one of these features is enabled. Time entered displays as a note in the ticket.

1. Select a timesheet using Time Tracking > **My Timesheets**.
2. Add a new entry to the timesheet by clicking **Add Entry**. The **New Timesheet Entry** dialog displays.
3. Enter a date and time for the timesheet entry.

4. Select the **Service Desk Ticket work type** (page 122) option.
5. Select the **Service Desk** definition.
6. Optionally select a **Status Filter** to limit the list of tickets displayed in the **Ticket** drop-down list.display.
7. Select either:
 - **Show All Tickets**
 - **Show My Tickets**
8. Select a **Ticket**.
9. The following fields display only if the **Service Billing** is installed and integrated with **Service Desk**. See **Creating Billing Entries using Service Desk** (page 18).
 - **Work Order** - Display only. Displays only if a work order is associated with the ticket on the General tab of the ticket editor.
 - **Work Order Item** - The work order line to associate with the hours worked. Displays only if a work order is associated with the ticket on the **General** (page 24) tab of the ticket editor.
 - **Activity Type** - Labor entries are grouped by **activity type** to analyze the cost and revenue of labor. The classification of activity types typically reflects the accounting requirements of a company. Labor entries are classified by both activity type and **resource type** (page 121). Not editable if a detailed work order is selected.
 - **Resource Type** - A **resource type** specifies a *skill*, *material* or *cost* and sets a default rate for a billable labor item or entry. Typically a resource type represents a skill performed by a staff member. A billing rate and standard cost is defined for each *skill* required to perform the service. The rate can be overridden when selected. Because the labor performed to deliver a service sometimes requires incidental charges for materials and costs, resource types can also be classified as either *material* or *cost*. For example, extra cabling or overnight shipping might be included as additional, billable labor entries, because they are required to deliver the service of installing a server. The classification of resource types typically reflects the production requirements of a company. Labor entries are classified by both resource type and by activity type. Not editable if a detailed work order is selected.
 - **Rate** - The default billing rate for the selected resource type. Display only.
 - **Override Rate** - A manually entered rate that overrides the default billing rate for a selected resource type. Does not display if a detailed work order is selected.
 - **Show Note on Invoice** - If checked, the note is displayed on the printed invoice.
10. Select a **Task**. This field only displays if **Tasks** (page 17) are enabled for the service desk.
11. Optionally add a **Note**.
12. Optionally make the note a **Hidden Note** in the ticket.
13. **Billable** - If checked, the entry is billable. If **Service Billing** is not installed, the **Billable** checkbox is for reference purposes only. If **Service Billing** is installed the entry is forwarded to **Service Billing**. If timesheets require approval, the timesheet containing this entry must be approved before the entry is forwarded to **Service Billing**.
14. Click **Save** to close this dialog. The new entry displays in the timesheet.
15. Click **Save** to save your changes to the timesheet.

Task Information

Tasks organize a **Service Desk** ticket into a series of steps. Each task can be assigned a different assignee and tracked individually for completion. You can add notes and hours worked by individual task. All tasks for all tickets can be listed, sorted, filtered, searched and viewed using the **Tasks Associated with Tickets** (page 32) page. If enabled in the ticket editor in the **Tickets** page, tasks are accessed using a separate **Tasks tab** (page 27).

Service Desk Overview

Note: The **Service Billing Integration** and **Task Information** options cannot be used together within the same service desk.

To enable the display of tasks in **Service Desk**:

1. Ensure **Enable Task Information** is checked in the Desk Definition > New / Edit / **General Info** (page 37) tab if you want to make this the default setting for all new user roles created from this point forward.
2. Ensure **Show Task Information** is checked in the Service Desk > Role Preferences > **Service Desk** (page 59) tab for each combination of role and service desk, as necessary.
3. Ensure task values are defined for the desk definition, using the Desk Definition > Properties > **Task Status Values** (page 40) tab.
4. Create or edit a ticket. The **Tasks tab** (page 28) will display.

For more information see:

- **Tasks Associated With Tickets** (page 32)
- **Adding / Editing a Task** (page 33)
- **The Add Note Dialog** (page 28)

Creating Billing Entries using Service Desk

Time entered in tickets for **Service Desk** 1.3 and later can be included as billable entries in **Service Billing**. Tickets associated with a **Service Billing** customer are listed in the Customers > Tickets tab.

Note: The **Service Billing Integration** and **Task Information** options cannot be used together within the same service desk.

Creating Billable Entries Using Service Desk

1. Ensure the customer in **Service Billing** is also an organization in the VSA.
2. Ensure **Enable Service Billing Integration** is checked for the service desk using Service Desk > Desk Definition > New / Edit > **General Info** (page 41) tab.
3. Ensure **Submit Time Entry Data to Service Desk** is checked using Time Tracking > **Settings**. This allows time entered in **Service Desk** tickets to appear in **Service Billing**.
4. Ensure the following fields are checked in Service Desk > Role Preferences > **Service Desk** (page 59) tab for each combination of role and service desk, as necessary.
 - Word Order
 - Activity
 - Resource Type
 - Standard Rate
 - Override Rate
5. Associate a ticket with an organization in the **General** tab of the **Service Desk** ticket editor.
6. Optionally associate the ticket with a selected work order in the **General** tab of the ticket editor. The work order field only displays after the organization is selected.
7. Create an billable or non-billable entry in **Service Desk** that can be forwarded to **Service Billing** using one of three procedures:
 - Enter a entry in the **Notes tab** (page 26) of the ticket editor.
 - Add a note using the **The Add Note Dialog** (page 28).
 - Create a time entry using **timesheets or timers** (page 14).
8. Bill for the billing entries you submit in Service Billing > **Pending Items**. If timesheets require approval, a timesheet containing a billing entry must be approved before the billing entry is forwarded to **Service Billing**.

Operations

The **Operations** folder contains the items you use most frequently in the **Service Desk** module:

- **Tickets** (page 19) are records of your organization's responses to support issues.
- **Organization Tickets** (page 31) display tickets by organization.
- **Tasks Associated with Tickets** (page 32) displays all ticket tasks by task. See **Task Information** (page 17).
- **Archive Tickets** (page 33) are closed tickets that you can continue to reference.
- **Search All** (page 34) searches for text in any ticket or KB article you have access to.
- **Knowledge Base** (page 33) articles comprise an ever-growing reference to known issues about your products or services.

Tickets

Service Desk > Operations > Tickets

A **ticket** tracks the detection, reporting, and resolution of an issue. Every communication and action taken on behalf of the issue can be recorded in the ticket record.

See the following subtopics for **Tickets**:

- **The Ticket Table** (page 19)
 - **Action Buttons** (page 20)
 - **Filtering Tickets** (page 22)
- **The Ticket Editor** (page 23)
 - **General tab** (page 24)
 - **Notes tab** (page 26)
 - **Related Items tab** (page 27)
 - **Tasks tab** (page 28)
- **The Add Note Dialog** (page 28)
- **Standard Fields** (page 30)

The Tickets Table

Service Desk > Operations > Tickets

The **Tickets** page displays all tickets a VSA user is authorized to see in a table format.

Note: The page can be optionally divided into upper and lower panes, by service desk, using the Desk Definition > **General Info tab** (page 37) > **Show Incident Notes Pane** checkbox. If enabled, the table is in the upper pane and the *description* and *notes* of a selected ticket display in two separate tabs in the lower pane.



See the following additional topics about using the **Tickets** table.

- **Action Buttons** (page 20)
- **Filtering Tickets** (page 22)

Page Selection and Ticket Counts

A page selection bar displays just above the column headings of the **Tickets** table.

Operations

- **Page Select** - When more rows of data are selected than can be displayed on a single page, click the  and  buttons to display the previous and next page. The drop-down list alphabetically lists the first record of each page of data using the *sort order of the selected column on that page*.
- **Selected** - The number of rows selected in the table. Includes selections on multiple pages.
- **Viewing** - The number of rows in the current page and the total number of rows in all pages.

Customizing Columns





This table supports **selectable columns, column sorting, column filtering and flexible columns widths** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?6875.htm>).

Standard Fields and Custom Fields



Standard Fields (page 30) refer to built-in fields provided by a service desk. They display as columns in the ticket table and in **field permission** (page 59) dialogs. A standard field is not necessarily available for all combinations of desk definition and user role. Nor does the same standard field necessarily display in both the ticket table and in field permission dialogs. **Custom fields** (page 40)—if defined for a service desk—also display as columns in the ticket table and in field permission dialogs.

Tickets Icons

Tickets rows display one of the following icons:

-  - The ticket has been *read* since it was last changed.
-  - The ticket is *unread* since it was last changed. When a note is added to a ticket, the ticket is reset to *unread* for other users.
-  - **Email notification is pending** (page 121) since the ticket was last changed. Select the ticket and click **Stop Notification** to prevent notification.
-  - The ticket is *locked* for editing.

Previewing Tickets

To display the details of a ticket in a *new window* click the new window  icon. Hovering the mouse cursor over the  icon of a ticket displays a preview window of the latest notes for that ticket. Use this to quickly review tickets in your queue. The number of milliseconds the cursor has to hover can be specified using System > **Preferences** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?503.htm>).

Color Coding of Ticket Rows

Ticket rows are color-coded by their age, from a selected type of date: Creation Date, Due Date, Promised Date, or Date Last Modified. Colors are assigned to:

- Tickets older than a specified number of days from the selected type of date.
- Tickets younger than a specified number of days from the selected type of date.
- Tickets in between these two age groups.

Color coding is defined using **Role Preferences** (page 57) and **User Preferences** (page 60). **User Preferences** has precedence over **Role Preferences**.


Action Buttons

Service Desk > Operations > Tickets

The following actions are provided to manage selected tickets. In some cases you have to select one or more rows to enable these action buttons.

- **New** - Displays the following options.
 - **New Ticket** - Creates a new ticket.

Note: You can customize the New Ticket forms displayed when adding and editing tickets.

- **Add Note** - Enters notes and reports hours worked for a **selected** ticket. See **The Add Note Dialog** (page 28).
- **Goto** - Enter a known ticket ID to edit the ticket.
- **View** - Displays a ticket without allowing any edit changes. Selected users may only have access to view a ticket using this option. You can select multiple tickets and page from one ticket to the next in **View** mode.
- **Edit** - Edits a selected ticket.
- **Delete** - Deletes selected tickets.
- **Mark** - Displays the following options.
 - **Read** - Marks selected unviewed tickets as having been previously viewed.
 - **Unread** - Unmarks selected viewed tickets as having not yet been viewed.
- **Group Updates** - Updates multiple tickets at the same time. For example, you can set a group of tickets to **Closed**. All tickets must be members of the same service desk.
- **Ticket** - Displays the following options.
 - **Stop Notification** - Pending email notification of selected tickets can be stopped using **Stop Notification in Tickets** (page 19). This option is used in conjunction with **Email Send Delay in Role Preferences** (page 57) and **User Preferences** (page 60). For example, if **Email Send Delay** is set to 5 minutes for the role you are using, then you have 5 minutes to cancel any emails that are pending for a ticket using **Stop Notification**. Applies to ticket rows displaying a  icon in the icon column of the ticket table. **Stop Notification** only stops currently pending email.
 - **Archive** - Archives selected tickets. See **Archived Tickets** (page 33) to review archived tickets or to unarchive tickets.
 - **Copy - Copies a selected ticket** (page 21) to a target service desk or knowledge base desk.
 - **Link** - Links two or more selected items. Linked items display in the **Related Tickets** tab of a ticket or KB articles. Use **Search All** (page 34) to select and link items from different desks.
 - **Unlock** - Unlocks selected items. An item locks each time you edit it, preventing other users from editing it at the same time. If a user has left an item open and you need to maintain it, you can unlock the item to gain access to it. Doing so prevents the user who originally opened the item from saving his or her changes. Tickets locked by expired or non-existent sessions are automatically unlocked when **reapply schema** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?248.htm>) runs.
 - **Merge** - Merges multiple tickets into a single ticket. Presents differences between tickets as options. You must select which option you want to keep after the merge. Use **Search All** (page 34) to select and merge tickets from different service desks.
 - **Undo** - Reverts changes made during the last save to a ticket's status, priority, stage, category, subcategory, resolution, last edit time and any note made during the last save. All other fields are unchanged. Procedures are not run as a result of an **Undo**.
- **Statistics** - Displays **Service Desk** statistics, by desk definition and date range.

Copying Tickets and KB Articles

Service Desk > Tickets > Ticket > Copy

Service Desk > Tickets > Edit > Copy Ticket

Service Desk > Knowledge Base > Copy an Article

Service Desk > Search All > Copy

The fastest way of creating a new item is to create it from another item. In the **Service Desk** module there are four buttons that support copying tickets or KB articles.

- The Service Desk > Tickets > Ticket > **Copy** button *copies tickets to either a new ticket or a KB article*.
- The Service Desk > Tickets > Edit > **Copy Ticket** button *only copies tickets to a KB article*.

Operations

- The Service Desk > Knowledge Base > **Copy an Article** button *only copies a KB article to a KB article.*
- The Service Desk > Search All > **Copy** button *copies either tickets or KB articles to either tickets or KB articles.*

Options

- **(Field Values)** - Changes the field values of the target item being created.
- **Note Handling** - Inserts a hidden note in the target item with the source note information.
 - **Don't Copy Notes** - Notes are not copied to the target item.
 - **Copy Notes** - Notes are copied to the target item without changing them.
 - **Copy Notes into Description** - Notes are copied and consolidated, populating the description field of the target item.
- **Link Ticket** - If checked, links source and target items as related items.
- **Action to take on original ticket**
 - **Close** - Makes a copy of the original item, then closes the original item.
 - **Close and Archive** - Makes a copy of the original item, then closes and archives the original item.
 - **Delete** - Makes a copy of the original item, then deletes the original item permanently. In effect, the original item is "moved" from one desk to another.
 - **Do Nothing** - Takes no action on the original item.

Filtering Tickets

Service Desk > Operations > Tickets

There are multiple ways of filtering the rows displayed in the **Tickets** table. **All methods of filtering can be combined at any time. Clicking Reset removes all filtering.**

- **Service Desk Selection** (page 22)
- **Searching for Tickets** (page 22)
- **Column Filtering** (page 22)
- **Named Filters** (page 23)

Service Desk Selection

The tickets displayed in the **Tickets** table depend on the **Service Desk** you select at the top of the table.

Note: Custom columns are defined by service desk and display only if you select the service desk they were defined for. Custom fields can be selected like any other column, sorted on and used to filter items.

Searching for Tickets

Enter a search string in the **Search** edit box. Only rows containing the search string in the **Summary**, **Description** or **Notes** fields are displayed. You can also use the **Goto** (page 20) action button to search for a ticket by ticket ID.

Column Filtering

Click the column drop-down arrow to enter a filter value for that column. For example enter **NS** to find all rows that start with **NS** in that column. Enter **NS%2** to find all rows that start with **NS** and end with **2** in that column. You can filter by multiple column filters if you like.

Named Filters

Named filters are "fixed" combinations of filtering criteria, based on many of the columns you see in the table. They are selected using the **View** drop-down list. Named filters are created, edited, saved, shared and deleted by users. Additional options include:

- **This field can be a column filter** - This extra checkbox displays for many of the filter columns shown in the **Edit a Filter** dialog.
 - If checked, the filter selections you've defined for that column can be changed dynamically within the table, just like any other column not specified by the named filter.
 - If blank, the filter selections you've defined for that column cannot be modified in the table. The column filter option doesn't display for this column in the table, preventing you from making any changes to it. *Leaving this checkbox blank reduces confusion*, since you can be confident that the named filter settings have not been modified by any additional column filtering you may have performed.
- **Similar to/Like** - The text entered occurs *anywhere* within the target cell. Entering wild card characters is not necessary. For example, filtering a column by text that contains `age` will display records with the following cell values: `age`, `agent`, `storage`, etc.
- **Not Like/Is Not Assigned** - The text entered occurs *nowhere* within the target cell.
- **Assignees and Pools** - Filtering by assignee includes all pools an assignee is a member of. Filtering by `Any Assignee` shows all tickets assigned to either an assignee or pool. Filtering by `No Assignee` shows unassigned tickets.
- **Sharing** - See **Sharing User-Owned Objects** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?5537.htm>).

Named Filters and Service Desk Selection

- If you have a named filter that specifies a service desk, then the service desk for that filter is selected in the service desk drop-down list.
- If you have a named filter that does not specify a service desk, then the named filter still applies when you switch service desks using the drop-down list.
- If you have a named filter that specifies a service desk, and then you change the service desk in the service desk drop-down list, the other filter criteria for that named filter still apply, but the **View** combo box shows `No Filter`.

The Ticket Editor

Service Desk > Operations > Tickets > New or Edit

Note: The ticket layout described below is for the standard `Fixed_Width_Tabbed` **editing template** (page 119) used to create a ticket based on the `ITIL Incident` **definition template** (page 46). You may see a different order and selection of fields if a different editing template and desk definition is used.

Adding / Editing a Ticket

Click **New** to display the **Create a New Ticket** window. To edit an existing ticket, click a row then click the **Edit** button, or double-click a row.

Ticket Editor Action Buttons

- **Save** - Save changes without closing the ticket.
- **Save and Close** - Save and close the ticket.
- **Copy ticket** - Create a **KB article** (page 21) by copying the contents of the ticket.
- **Cancel** - Close the ticket without saving any changes.

Operations

Note: See [Time Tracking and Service Desk](#) (page 14) for an introduction to timers in **Service Desk**.

- **Start Timer** - Starts a timer associated with the ticket.
 - The ticket does not have to be saved to keep the timer going.
 - You can close the ticket, log out of the VSA, then log back in later. The timer continues to track elapsed time.
 - If a ticket timer is already running and you re-open a ticket in the ticket editor, the **Pause Timer** and **Apply Timer** buttons display. You can now pause or apply the elapsed time.
 - When you start a timer in the ticket timer, it displays as one of the standard timers in the upper-right hand corner of the VSA.
 - ✓ A timer created using the **Start Timer** button in the ticket editor always displays the number of the ticket it is linked to, for example, Ticket CS009345.
 - ✓ You can pause and apply a timer linked to a ticket using the timer controls in the upper-right hand corner of the VSA and the time will be applied to the ticket just as if you did so from within the ticket editor.

Note: If you happen to create additional timers *linked to the same ticket number* using the timer control panel in the upper-right hand corner of the VSA, the timer furthest to the left is the one that is always selected if the ticket is re-opened in the ticket editor. Typically this is the timer that has been running the longest, since timers are created from left to right.

- **Pause Timer** - Pauses the timer associated with the ticket.
- **Apply Timer Time** - Populates the **Hours Worked** field with the elapsed time. You can override the time displayed in the **Hours Worked** field before you save the ticket.

Tickets are added and edited using the following tabs in the ticket editor dialog.


- **General tab** (page 24)
- **Notes tab** (page 26) - Displays only when editing a ticket.
- **Related Items tab** (page 27)
- **Tasks tab** (page 28)



Note: Some of the fields in the ticket editor may be hidden or view only, based on settings in **Role Preferences**.

General tab

Service Desk > Operations > Tickets > Add/Edit > General tab











Summary Information

- **Service Desk** - *Can only be changed if the ticket is new.* Select a desk definition for the new ticket. The desk definition populates a new ticket with pre-defined values and determines what values are possible for you to select in standard and custom fields. Automated processing of tickets is determined by the set of procedures linked to that ticket's service desk. You can select a different service desk provided you've been given access to more than one service desk. Defaults to the **service desk selected in the Tickets table** (page 22).
- **Ticket Number** - Blank if the ticket is new. The unique identifier for the ticket. This value cannot be changed. Click the magnifier icon  to search for another ticket or KB article, then either view it or edit it.
- **Summary** - A one line summary description of the ticket.
- **Submitter Name** - The name of the person submitting the ticket. Usually this is the name of the user calling or emailing about a service issue.

- **Submitter Email** - The email address of the submitter.
- **Machine ID, Organization, Contact, Phone Number** - Associate a ticket using the magnifier icon  next to any of these fields. A contact is a staff member of an organization. Use the **Machine ID** magnifier icon  in the ticket editor to associate a ticket *with either a machine group or a machine ID*. Associating a ticket:
 - Makes the ticket visible to users if their *user role* uses the `Service Desk Technicians` role type and the related machine or related organization is within their *scope*.
 - Can determine the *policy* assigned to this ticket *if the association is created while the ticket is new*. See `Service Desk > Desk Definition > Processing > Associated Policies` (page 42) for more information.
- **Organization ID** - Click the hyperlink beneath the **Organization ID** to display organization details, if an organization has been associated with the ticket. This includes general information, custom fields, machine groups, departments, staff, and secured data. This same data is available using **Organization Tickets** (page 31).
- **Work Order** - Associates the ticket with a work order in Service Billing. Displays only if **Enable Service Billing Integration** is enabled in `Desk Definition > General Info` (page 37) tab. See **Creating Billing Entries using Service Desk** (page 18).
- **Contact Email** - Displays a contact email address, if an organization's staff member is associated with the ticket and the email address is defined in the staff member record.
- **Created** - The date/time the ticket was created.
- **Promised** - The date/time the customer has been promised resolution of the ticket. This can be manually changed by the call taker.
- **Escalation** - The date/time an escalation counter was last set for this ticket and the amount of time before the escalation procedure is triggered.
- **Work Performed On** - The date and time work was performed on the ticket. This value is independent of the entries entered for hours worked.
- **Status** - Status codes represent the state a ticket is in, regardless of any other classification.
- **Priority** - Prioritizes service requests.
- **Stage** - The stage the ticket is in.
- **Assigned to** - The VSA user or **pool** (page 121) the ticket is assigned to. The list of assignees available to select includes *any* member of *any* non-master scope you belong to, providing that scope is assigned the same service desk you are using. A scope does not have to be currently selected for the **Assigned to** field to include its members in the list.
- **Last Edit** - The date/time the ticket was last edited.
- **Closed** - The date/time the ticket was closed by setting the **Status** field to **Closed**.
- **Due** - The due date/time for the ticket. A value only displays in this field if a goal procedure is linked to the desk definition. The due date can be modified by the `Pause Ticket Goal` (page 88), `Resume Ticket Goal` (page 88) and `Set Ticket Goal Time` (page 89) service desk procedure commands.
- **Category** and **SubCategory** - Classifies the type of service requested.
- **Severity** - Classifies how critical a service request is to an organization's operations.
- **Policy** - The **policy** (page 7) in effect for this ticket. Policies are assigned by the desk definition used to create the ticket.
- **Owner** - This field only displays after a ticket is created. The VSA user ultimately responsible for resolving the ticket.
- **Custom Fields** - Additional custom fields may display and are available for data entry, depending on the requirements of your service organization.
- **Description** - Double-click the description text box to edit the description. A popup window displays with a toolbar at the top:



Operations

- Expand / Contract - Expands or contracts the edit window.
-  - Hyperlink selected text. You may need to reset links copied and pasted from another source.
-  - Copy selected text from Microsoft Word and paste into text pane.
-  - Insert a table.
-  - Insert a horizontal line as a percentage of the width, or set a fixed width in pixels.
-  - Indent text.
-  - Outdent text.
-  - Set selected text to subscript.
-  - Set selected text to superscript.
-  - Remove formatting of selected text.
-  - Insert special characters and symbols.

Notes tab

Service Desk > Operations > Tickets > Add/Edit > Notes tab

- Displays only when editing the ticket.

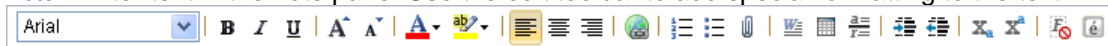
The **Notes** tab enables you to enter notes and report hours worked for the entire ticket. Additional fields are used to classify the type of work performed or to submit the hours worked to **Service Billing** for billing purposes. When a note is added to a ticket, the ticket is reset to **Unread** for other users.

Add Note

- **Date Time Started** - Displays only if **Auto Save Clock** is unchecked in in the **General Info** (page 37) tab in **Desk Definition**. Specifies the date and time of a note for backdating purposes. If hours are reported when the note is added, then the hours are posted in the **Time Tracking** module using the date and time specified. Only supported using the `Fixed_Width_Tabbed` and `Fixed_Width_No_Tabs` editing template.
- **Hours Worked** - Enter the number of hours you've worked on this ticket. Typically when you enter hours worked, you also enter a note describing the work you've done. This field is hidden if the Service Desk > Desk Definition > **General** (page 37) > **Auto Save Clock** checkbox is checked.
- **Note Template** - Append a note template to the ticket notes. Note templates are predefined blocks of text. They are maintained using Service Desk > **Note Templates** (page 50).
- **Add as Hidden** - If checked, do not notify the submitter by email and hide the note from machine users viewing the ticket using **Portal Access**. If unchecked, the added note is public for all users.
- **Suppress Notification** - If checked, suppresses email and message notification, both internal and external, including any other changes included with this note.
- **Billable** - If checked, the entry is billable. If **Service Billing** is not installed, the **Billable** checkbox is for reference purposes only. If **Service Billing** is installed the entry is forwarded to **Service Billing**. If timesheets require approval, the timesheet containing this entry must be approved before the entry is forwarded to **Service Billing**.
- The following fields only display if a service desk is integrated with **Service Billing**. See **Creating Billing Entries using Service Desk** (page 18).
 - **Work Order Item** - The work order line to associate with the hours worked. Displays only if a work order is associated with the ticket on the **General** (page 24) tab of the ticket editor.
 - **Activity Type** - Labor entries are grouped by **activity type** to analyze the cost and revenue of labor. The classification of activity types typically reflects the accounting requirements of a company. Labor entries are classified by both activity type and **resource type** (page 121). Not editable if a detailed work order is selected.
 - **Resource Type** - A **resource type** specifies a *skill*, *material* or *cost* and sets a default rate for a billable labor item or entry. Typically a resource type represents a skill performed by a staff

member. A billing rate and standard cost is defined for each *skill* required to perform the service. The rate can be overridden when selected. Because the labor performed to deliver a service sometimes requires incidental charges for materials and costs, resource types can also be classified as either *material* or *cost*. For example, extra cabling or overnight shipping might be included as additional, billable labor entries, because they are required to deliver the service of installing a server. The classification of resource types typically reflects the production requirements of a company. Labor entries are classified by both resource type and by activity type. Not editable if a detailed work order is selected.

- **Rate** - The default billing rate for the selected resource type. Display only.
- **Override Rate** - A manually entered rate that overrides the default billing rate for a selected resource type. Does not display if a detailed work order is selected.
- **Show Note on Invoice** - If checked, the note is displayed on the printed invoice.
- **Note** - Enter text in the note pane. Use the edit toolbar to add special formatting to the text.



- - Hyperlink selected text. You may need to reset links copied and pasted from another source.
- - Copy selected text from Microsoft Word and paste into text pane.
- - Insert a table.
- - Insert a horizontal line as a percentage of the width, or set a fixed width in pixels.
- - Indent text.
- - Outdent text.
- - Set selected text to subscript.
- - Set selected text to superscript.
- - Remove formatting of selected text.
- - Insert special characters and symbols.

Resolution

- **Resolution** - Select a value that classifies how an issue was resolved.
- **Resolution Description** - Enter a description of how the issue was resolved. Use the edit toolbar buttons described for the **Description** field to add special formatting to the text.

(Note History)

- **(Edit)** - Double click a note to edit its description.
- **Split** - Splits the current ticket and move all notes *after the selected note's date* and all current settings of the current ticket to a new ticket.
- **Delete** - Deletes a selected note.
- **Hidden** - Select a note and check it to mark the note as internal-only, meaning hidden from external users, such as submitters being notified by email, or machine users viewing the ticket using **Portal Access**. Uncheck the note to make it public to all users. Yellow is the default background color for hidden notes.
- **Task Notes** - Blue is the default background color for notes created for a **task** (page 121).


Note: Default background colors for notes are set using **Global Settings** (page 56).

Related Items tab

Service Desk > Operations > Tickets > Add/Edit > Related Times tab

Click the **Related Items** tab to view items related to your ticket. This includes other tickets as well as KB articles.

Operations

- **(Related Items)** - The list of tickets and KB articles related to the current ticket. Usually blank when a ticket is first created.
- **Link Related Item** - Clicking this icon displays a search window of all other tickets and KB articles you are authorized to view. You can add one item at a time to the **Related Items** list. When the search window opens you can click the column drop-down arrow  to hide or show columns and filter the list of items in the search list.
- **Related Ticket Details** - Displays the related item contents in the bottom pane, including **Priority**, **Category**, **Subcategory**, **Description** and **Notes**.

Note: You can also add tickets to the **Related Tickets** table without opening a ticket, by selecting two or more rows in the ticket table and clicking the **Ticket > Link** (page 20) button.

Note: A service desk procedure can automate the creation of related tickets using the **Link to Another Ticket** (page 87) step. A service desk procedure can also return a list of related tickets using two property variables: `[$RelatedTicketsAsBulletList$]` and `[$RelatedTicketsAsString$]`. See **Standard and Custom Property Variables** (page 52) for a list of property variables.

Tasks tab

Service Desk > Operations > Tickets > Add/Edit > Tasks tab

The **Tasks** tab creates and maintains a list of tasks by ticket. **Tasks** organize a **Service Desk** ticket into a series of steps. Each task can be assigned a different assignee and tracked individually for completion. You can add notes and hours worked by individual task. All tasks for all tickets can be listed, sorted, filtered, searched and viewed using the **Tasks Associated with Tickets** (page 32) page.

Note: See **Task Information** (page 17).

Actions

- **New** - Creates a new task for ticket. See **Adding / Editing a Task**. (page 33)
- **View** - Displays a task without allowing any edit changes. Selected users may only have access to viewing a task, depending on their role.
- **Edit** - Edits a selected task.
- **Add Note** - Enters notes and reports hours worked for a selected tasks. See **The Add Note Dialog** (page 28).

The Add Note Dialog

Service Desk > Tickets > New > Add Note

- You must select an *existing* ticket to enable the **Add Note** button in the Tickets table.

Service Desk > Organization Tickets > Tickets tab > Add Note

Service Desk > Tasks Associated with Tickets > Add Note

Service Desk > Tickets > Task tab > Add Note

You can *enter notes and report hours worked* for a **selected** ticket, without necessarily having to open that ticket. A similar add note form displays for adding a note to the entire ticket or to a specific task within a ticket.

Note: The ticket layout described below is for the standard `Fixed_Width_Tabbed` **editing template** (page 119) used to create a ticket based on the `ITIL Incident` **definition template** (page 46). You may see a different order and selection of fields if a different editing template and desk definition is used.

Adding a Note

- The following fields display if **Tasks** (page 17) are enabled for the service desk.
 - **Task** - Selects or displays the associated task, if applicable. The following fields only display if a **Task** is selected.
 - ✓ **Status** - The status of the task.
 - ✓ **% Complete** - The percent complete for the task.
- **Date Time Started** - Displays only if **Auto Save Clock** is unchecked in in the **General Info** (page 37) tab in **Desk Definition**. Specifies the date and time of a note for backdating purposes. If hours are reported when the note is added, then the hours are posted in the **Time Tracking** module using the date and time specified. Only supported using the `Fixed_Width_Tabbed` and `Fixed_Width_No_Tabs` editing template.
- **Hours Worked** - Enter the number of hours you've worked on this ticket. Typically when you enter hours worked, you also enter a note describing the work you've done. This field is hidden if the Service Desk > Desk Definition > **General** (page 37) > **Auto Save Clock** checkbox is checked.
- **Note Template** - Append a note template to the ticket notes. Note templates are predefined blocks of text. They are maintained using Service Desk > **Note Templates** (page 50).
- **Add as Hidden** - If checked, do not notify the submitter by email and hide the note from machine users viewing the ticket using **Live Connect**. If unchecked, the added note is public for all users.
- **Suppress Notification** - If checked, suppresses email and message notification, both internal and external, including any other changes included with this note.
- **Billable** - If checked and the time entered is associated with a work order line, the hours worked are billable.

Note: The **Billable** checkbox is for reference purposes only in timesheets, if **Service Billing** is not installed.

- The following fields only display if a service desk is integrated with **Service Billing**. See **Creating Billing Entries using Service Desk** (page 18).
 - **Work Order** - Display only. Displays only if a work order is associated with the ticket on the General tab of the ticket editor.
 - **Work Order Item** - The work order line to associate with the hours worked. Displays only if a work order is associated with the ticket on the **General** (page 24) tab of the ticket editor.
 - **Activity Type** - Labor entries are grouped by **activity type** to analyze the cost and revenue of labor. The classification of activity types typically reflects the accounting requirements of a company. Labor entries are classified by both activity type and **resource type** (page 121). Not editable if a detailed work order is selected.
 - **Resource Type** - A **resource type** specifies a *skill*, *material* or *cost* and sets a default rate for a billable labor item or entry. Typically a resource type represents a skill performed by a staff member. A billing rate and standard cost is defined for each *skill* required to perform the service. The rate can be overridden when selected. Because the labor performed to deliver a service sometimes requires incidental charges for materials and costs, resource types can also be classified as either *material* or *cost*. For example, extra cabling or overnight shipping might be included as additional, billable labor entries, because they are required to deliver the service of installing a server. The classification of resource types typically reflects the production requirements of a company. Labor entries are classified by both resource type and by activity type. Not editable if a detailed work order is selected.
 - **Rate** - The default billing rate for the selected resource type. Display only.
 - **Override Rate** - A manually entered rate that overrides the default billing rate for a selected resource type. Does not display if a detailed work order is selected.

Operations

- **Show Note on Invoice** - If checked, the note is displayed on the printed invoice.
- **Notes** - Enter text in the note pane. Use the edit toolbar to add special formatting to the text.



- **Expand / Contract** - Expands or contracts the edit window.
- - Hyperlink selected text. You may need to reset links copied and pasted from another source.
- - Copy selected text from Microsoft Word and paste into text pane.
- - Insert a table.
- - Insert a horizontal line as a percentage of the width, or set a fixed width in pixels.
- - Indent text.
- - Outdent text.
- - Set selected text to subscript.
- - Set selected text to superscript.
- - Remove formatting of selected text.
- - Insert special characters and symbols.

Standard Fields

Standard Fields (page 30) refer to built-in fields provided by a service desk. They display as columns in the ticket table and in **field permission** (page 59) dialogs. A standard field is not necessarily available for all combinations of desk definition and user role. Nor does the same standard field necessarily display in both the ticket table and in field permission dialogs. **Custom fields** (page 40)—if defined for a service desk—also display as columns in the ticket table and in field permission dialogs.

Note: Most standard fields have a corresponding *property variable*. See **Standard and Custom Property Variables** (page 52) for more information.

- **Activity** - The activity type associated with an hours worked entry. Applies only if **Service Billing Integration** (page 18) is enabled.
- **Actual Completed Date** - [$\$ResolutionDateTime$] - The date/time the ticket was resolved.
- **Assignee** - [$\$Assignee$] - The VSA user currently assigned to the ticket.
- **Category** - [$\$Category$] - The **category** (page 39) assigned to the ticket.
- **Closed Date and Time** - [$\$ClosedDateTime$] - The date/time the ticket was closed.
- **Contact Email** - [$\$StaffEmail$] - The contact's email address.
- **Contact Phone** - [$\$StaffPhone$] - The contact's phone number.
- **Creation Date and Time** - [$\$CreateDateTime$] - The creation date/time of the ticket.
- **Description** - [$\$Description$] - The description of the ticket.
- **Due Date and Time** - [$\$ExpectedDueDate$] - The **goal** (page 74) date/time for the entire ticket.
- **Entry Form** - Displays a drop-down list of different forms that can be used to edit a ticket.
- **Escalation** - [$\$EscalationDateTime$] - The date/time the ticket will be **escalated** (page 74) if it does not exit the current stage.
- **Hidden Note** - Optionally hides, shows or enables the creation of **hidden notes** (page 26).
- **Hours Worked** - [$\$TotalHoursWorked$] - The total hours worked on the ticket.
- **ID** - [$\$TicketId$] - The unique identifier for the ticket. This value cannot be changed.
- **Locked By** - The user currently editing the ticket. Locking prevents any other user from editing the ticket.
- **Locked On** - The date/time the ticket was locked.
- **Machine ID** - [$\$Machine$] - The machine ID associated with this ticket.

- **Modified On** - [{\$LastEditDateTime\$}] - The date/time the ticket was last edited.
- **Note** - Optionally hides, shows or enables the creation of non-hidden notes.
- **Organization Address** - The address of the organization assigned to the ticket.
- **Organization ID** - [{\$Organization\$}] - The **organization ID** (page 26) assigned to the ticket.
- **Organization Name** - The name of the organization assigned to the ticket.
- **Override Rate** - A manually entered rate that overrides the default billing rate for a selected resource type. Applies only if **Service Billing Integration** (page 18) is enabled.
- **Owner** - [{\$Owner\$}] - The VSA user ultimately responsible for resolving the ticket.
- **Priority** - [{\$Priority\$}] - The **priority** (page 39) assigned to the ticket.
- **Promise Date and Time** - [{\$ProjectedDate\$}] - The date promised to resolve the ticket.
- **Resolution** - [{\$Resolution\$}] - The **resolution** (page 40) assigned the ticket.
- **Resource Type** - The **resource type** (page 121) assigned to the ticket. Applies only if **Service Billing Integration** (page 18) is enabled.
- **Severity** - [{\$Severity\$}] - The **severity** (page 39) assigned to the ticket.
- **Source Type** - [{\$SourceType\$}] - Applies to tickets generated from an email or a system event, such as an alarm.
 - Email - Ticket was created from an email
 - Backup
 - KES
 - Patch
 - Monitor
 - Alarm
 - Portal
 - ServiceDesk
 - Other
- **Staff ID** - [{\$Staff\$}] - Displays as the **Contact** field in the ticket editor. A contact is a staff member of an organization.
- **Stage** - [{\$Stage\$}] - The **stage** (page 41) assigned to the ticket.
- **Stage Goal** - [{\$GoalDateTime\$}] - The **goal** (page 74) date/time the ticket will be overdue if it does not exit the current stage.
- **Standard Rate** - The default billing rate for the selected resource type. Applies only if **Service Billing Integration** (page 18) is enabled.
- **Status** - [{\$Status\$}] - The **status** (page 39) assigned to the ticket.
- **Subcategory** - [{\$SubCategory\$}] - The **subcategory** (page 39) assigned to the ticket.
- **Submitter Email** - [{\$SubmitterEmailAddress\$}] - The email address of the submitter.
- **Submitter Name** - [{\$SubmitterName\$}] - The name of the person submitting the ticket. Usually this is the name of the user calling or emailing about a service issue.
- **Summary** - [{\$Summary\$}] - A one line summary description of the ticket.
- **Work Order** - [{\$WorkOrder\$}] - The **work order** (page 122) associated with the ticket.

Organization Tickets

Service Desk > Operations > Organization Tickets

The **Organization Tickets** page displays all tickets associated with a selected organization.

Operations

Actions

- **Search** - Enter a search string in the **Search** edit box. Rows containing the search string in any of the columns in the upper panel are displayed: **ID, Organization, Contact Name, Phone Number, Email Address, Tickets**
- **View** - Filters the list of organizations displayed in the upper panel. Similar to **named filters** (page 23) in the **Tickets** table.

The details of a selected organization are displayed using the following tabs:

- **General** - Displays general information about an organization.
- **Custom Fields** - Displays **custom fields** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?7184.htm>) and their values defined for an organization.
- **Machine Groups** - Displays the machine groups of an organization.
- **Departments** - Displays the departments of an organization.
- **Staff** - Displays the staff members of an organization.
- **Secured Data** - Stores data that remains encrypted in the database. For example, you could store the password necessary to connect to a customer's remote website.

Note: Secured data entered here is the same data displayed in **Secured Data** (<http://help.kaseya.com/WebHelp/EN/KSB-Online-Help.asp?7129.htm#o7114>) in **Service Billing** and in the **Service Desk** ticket editor when the hyperlink of an organization ID is selected on the **General** tab.

- **Tickets** - Lists and accesses tickets associated with an organization. See **Tickets Table Action Buttons** (page 20) for more information about each of these buttons.
 - **New** - Creates a new ticket.
 - **View** - Displays a ticket without allowing any edit changes. Selected users may only have access to view a ticket using this option. You can select multiple tickets and page from one ticket to the next in **View** mode.
 - **Edit** - Edits a selected ticket.
 - **Add Note** - Enters notes and reports hours worked for a selected ticket. See **The Add Note Dialog** (page 28).

Tasks Associated With Tickets

Service Desk > Operations > Tasks Associated With Tickets

The **Task Associated with Tickets** page lists all tasks you are authorized to see, displayed as a list of rows in a table. Tasks are identified by ticket and task number, separated by a period. For example IN006178.3 indicates the third task in ticket IN006178. See **Task Information** (page 17).

Actions

- **New** - Creates a new task for ticket. See **Adding / Editing a Task**. (page 33)
- **View** - Displays a task without allowing any edit changes. Selected users may only have access to view a task, depending on their role. You can select multiple tasks and page from one task to the next in **View** mode.
- **Edit** - Edits a selected task.
- **Add Note** - Enters notes and reports hours worked for a selected tasks. See **The Add Note Dialog** (page 28).

Adding / Editing a Task

Service Desk > Tickets > Add or Edit > Tasks > Add or Edit
 Service Desk > Tasks Associated With Tickets > Add or Edit

Click [Add](#) or [Edit](#) to specify a task.

- **Description** - Enter a one line description of the task.
- **Assignee** - The VSA user assigned this task.
- **Est. Hours** - The estimated hours to complete this task.
- **Promised Date** - The expected date to complete this task.

Archived Tickets

Service Desk > Operations > Archived Tickets

Archived Tickets are tickets that have been archived. Archived tickets can be displayed but not edited. They can also be unarchived so that you can continue editing them. The layout and navigation of an archived ticket is exactly the same as a ticket in the **Tickets** (page 19) table.

Select a single row before clicking either of these action buttons.

- **View** - Displays a ticket without allowing any edit changes.
- **UnArchive** - Returns selected archived tickets to the **Tickets** (page 19) table.

Knowledge Base

Service Desk > Operations > Knowledge Base

The **Knowledge Base** table comprises all *KB articles* you have access to view. KB articles represent known solutions to issues that are reported by your customers.

- Search by keyword across multiple KB articles, similar to **searching for tickets** (page 22) in the Tickets table.

Note: **Search All** (page 34) enables you to search by keyword across *all tickets and all KB articles*.

- Associate multiple tickets with the same KB article, enabling you to *manage tickets using a shared problem/solution business process*. If a problem is shared by many customers but the solution is still in development, once you have the solution, you can contact each customer affected by the problem by identifying all the customer tickets related to the KB article.
- **Create a KB article by copying it from a ticket** (page 21). This is the fastest way to create a KB article because the originating ticket often contains much of the detailed information required by the KB article.
- Create a KB article manually, in the same way you create a ticket.
- Ensure knowledge base articles display in **Live Connect** and **Portal Access**. See **Integrating Service Desk, Live Connect, Portal Access** (page 13).

Knowledge Base Table

All KB articles you are authorized to see are displayed as a list of rows in a table. The following actions are provided to manage KB articles. In some cases you have to select one or more rows to enable an action button.

- **New** - Creates a new KB article. Similar to **adding / editing a ticket** (page 23).
- **View** - Displays a KB article without allowing any edit changes. Selected users may only have access to view a KB article, depending on their role.

Operations

- **Edit** - Edits a selected KB article. Similar to **adding / editing a ticket** (page 23).
- **Delete** - Deletes one or more selected KB articles.
- **Copy an Article** - Copies a selected KB article to another KB article. See **Copying Tickets and KB Articles** (page 21).
- **Link** - Links two or more selected items. Linked items display in the **Related Tickets** tab of a ticket or KB articles. Use **Search All** (page 34) to select and link items from different desks.
- **Unlock Articles** - Unlocks selected items. An item locks each time you edit it, preventing other users from editing it at the same time. If a user has left an item open and you need to maintain it, you can unlock the item to gain access to it. Doing so prevents the user who originally opened the item from saving his or her changes.

Knowledge Base Definitions

Service Desk comes with a knowledge base definition already created for you called `KnowledgeBase`. You can begin to add KB articles immediately or create a new desk that matches your preferences. See **Setup Knowledge Base** (page 50).

Knowledge Base Templates

Two types of templates apply to knowledge base desks and KB articles.

- **Definition Template** - `Blank KnowledgeBase.xml` - *This template is mandatory to create a new KB article definition.* This is the template the `KnowledgeBase` definition is created from. A knowledge base definition supports the creation of KB articles rather than tickets. Once created, this definition can only be selected using the **Knowledge Base** function. It isn't selectable using the **Tickets** function. The word `Blank` in the xml filename indicates that standard field values are not populated when you create a definition based on this template. See **Service Desk > Desk Definition** (page 35) for detailed instructions about editing a definition.
- **Editing Template** - `Knowledge Base Article.xml` - *An editing template determines the layout of fields in the ticket editor or KB article editor.* The default `KnowledgeBase` definition uses an **editing template** (page 119) called `Knowledge Base Article.xml` that hides many of the standard ticket fields that are visible when you edit a ticket. The assumption is that a KB article doesn't require users to maintain all these extra fields. The editing template used to edit a ticket or KB article is optional. For example, you can use the `Default Ticket Entry.xml` to display a KB article editor that looks just like the standard ticket editor. Editing templates are assigned to desks using **Role Preferences** (page 57) or the **Desk Definition > Access > Roles** (page 43) tab.

Search All

Service Desk > Operations > Search All

The **Search All** page displays *all tickets* and *all KB articles* a VSA user is authorized to see in a table format. You can use this specialized table to search for text in **Description**, **Notes**, or **Summary** fields, whether that text or value is used in a ticket or KB article. You can also use the **Search All** table to link any combination of tickets or KB articles.

Actions

The following actions are provided to manage items in the **Search All** table. In some cases you have to select one or more rows to enable an action buttons. The functionality is similar to the **Tickets** (page 19) page for tickets and the **Knowledge Base** (page 33) page for knowledge base articles.

- **New** - Creates a new ticket.
- **View** - Displays an item without allowing any edit changes. You can select multiple items and page from one ticket to the next in **View** mode.
- **Edit** - Edits a selected ticket or KB article.

- **Delete** - Deletes selected tickets.
- **Group Updates** - Updates multiple tickets at the same time. For example, you can set a group of tickets to `Closed`. All tickets must be members of the same service desk.
- **Merge** - Merges multiple tickets into a single ticket. Tickets can be members of different service desks.
- **Copy** - Copies a selected ticket or KB article to either a ticket or a KB article. See **Copying Tickets and KB Articles** (page 21).
- **Link** - Links two or more selected items. Linked items display in the **Related Tickets** tab of a ticket or KB articles.
- **Unlock** - Unlocks selected items. An item locks each time you edit it, preventing other users from editing it at the same time. If a user has left an item open and you need to maintain it, you can unlock the item to gain access to it. Doing so prevents the user who originally opened the item from saving his or her changes.
- **Export** - In **Search All**, use the **Service Desk** column to filter the display of items to one desk, then click the **Export** button. Exports selected tickets, including attachments, to an XML file. If more than five tickets are selected for export, the export is performed in the background and an **Inbox** message is generated. The inbox message contains a link you can click to download the generated XML file. *All tickets must be members of the same service desk.*

Note: Desk definitions, message templates and tickets can be imported and exported using the **System > Import Center** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?4796.htm>). A desk definition can be exported as a template or as desk. Exporting a desk definition can include all the procedures that support it. Exporting a ticket includes the desk that supports it.

- **Import** - Imports tickets from another service desk, as an XML file.

Desk Definition

Service Desk > Desk Definition

Desk Definition determines how tickets and KB articles are managed and tracked. When created, tickets are populated with properties and values from a desk definition.

Actions

The following action buttons are provided:

- **New** - Creates the general settings of a new desk definition.
- **Edit** - Edits the general settings of a selected desk definition.
- **Rename** - Renames a selected desk definition.
- **Delete** - Deletes a selected desk definition.
- **Set Default** - Sets a selected desk definition as the default. Inbound email and alarms create tickets using the default desk definition, if no other methods override this default. See **Desk Definition > New or Edit > Standard Field Defaults** (page 38) > Email.
- **Import** - Imports a desk definition. When you import a desk definition, if that desk definition includes field level permissions for a role that does not exist on the target system, the role is created. No users are associated with this new role, but the correct role types are associated with it.

Note: Desk definitions, message templates and tickets can be imported and exported using the **System > Import Center** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?4796.htm>). A desk definition can be exported as a template or as desk. Exporting a desk definition can include all the procedures that support it. Exporting a ticket includes the desk that supports it.

Desk Definition

- **Export** - Exports a selected desk definition as an XML file.

Configuring a Desk Definition

Click any of the following topics for details on how to configure a desk definition.

- **General Settings** (page 36)
 - **General Info tab** (page 37)
 - **Standard Field Defaults tab** (page 38)
 - **Procedures tab** (page 38)
- **Properties tab** (page 39)
 - **Status tab** (page 39)
 - **Priority tab** (page 39)
 - **Category tab** (page 39)
 - **Severity tab** (page 39)
 - **Resolution tab** (page 40)
 - **Custom Fields tab** (page 40)
 - **Task Status Values tab** (page 40)
- **Processing tab** (page 41)
 - **View tab** (page 41)
 - **Stage tab** (page 41)
 - **Associated Policies tab** (page 42)
- **Access tab** (page 43)
 - **Roles tab** (page 43)
 - **Pools tab** (page 43)

General Settings

Service Desk > Desk Definition > New or Edit

General settings for existing desk definitions are displayed as a series of columns in the upper panel of the **Desk Definition** page.

Creating a New Desk Definition

1. Click the **New** button at the top of the Service Desk > **Desk Definition** page. The **Add Service Desk Definition** dialog displays.
2. Select one of two options:
 - **Use selected template** - Displays the **Definition Template** drop-down list so that a template can be selected to create a desk definition.
 - **Import template from file** - Displays the **Upload an XML file for Import** field so that a new desk definition *template* can be imported. After the import, the template displays with the other templates and can be used to create a new desk definition.
3. **Definition Template** - Select a desk definition template.
4. Enter a **Name** and **Description** for your new desk definition.
5. Enter a **Prefix** to assign to tickets IDs based on your new desk definition.
6. Select an **Editing Template** (page 119). An editing template sets the default field permissions for editing a ticket or KB article.
7. Select the **Desk Administrator** who should be notified if there is a problem with the desk definition. For reference purposes only.

8. Optionally select a default **Policy** (page 7).
9. Optionally select an **email reader** (page 62) to associate with the desk definition in the **Email** field. Emails received by this reader are converted into tickets based on this service desk by default. You can override this default association using a **Ticket Request Mapping** procedure.
10. Click the **Save** button.

Editing a Desk Definition

1. Select the row of a desk definition in the upper pane.
2. Click the **Edit** button at the top of the **Desk Definition** page. To edit an existing desk definition, select a desk definition, then click **Edit** or double-click the desk definition to open the desk immediately.
3. When editing a desk definition general settings are displayed in a dialog with three tabs.
 - **General Info tab** (page 37)
 - **Standard Field Defaults tab** (page 38)
 - **Procedures tab** (page 38)

General Info tab

Service Desk > Desk Definition > New or Edit > General Info tab

Options on the **General Info** tab determine how the ticket editor or KB article editor behaves globally. In some cases these settings can be overridden by **Role Preferences** (page 57) or **User Preferences** (page 60).

Note: Not all attributes are available when *adding a record*.

- **Use selected template** - Displays in Add mode only. Creates the desk definition based on a template.
- **Import template from a file** - Displays in Add mode only. Creates the desk definition by importing an XML file. Typically the XML file was created by exporting the desk definition from another **Service Desk** module.
- **Name** - The name of the service desk. Display only in Edit mode.
- **Description** - A brief description of the service desk.
- **Prefix** - The prefix is added to each ticket created based on this service desk. Display only in Edit mode.
- **Definition Template** - The template used to create the desk definition. Display only in Edit mode.
- **Editing Template** - The default **editing template** (page 119) used to maintain tickets based on this service desk. Can be overridden by role using Desk Definition > Access > **Roles** (page 43) or by **Role Preferences** (page 57).
- **Desk Administrator** - The person responsible for maintaining the service desk. This user is sent messages for procedures that fail to execute properly.
- **Default Desk Definition** - If checked, sets this desk definition as the default. Inbound email and alarms create tickets using the default desk definition, if no other method specifies the desk definition to use. Can also be set using the **Set Default** (page 35) action button.
- **Display Machine Info** - If checked, displays machine info in the ticket editor.
- **Require Machine Info** - If checked, requires a machine ID to be entered in the ticket editor.
- **Display Organization Info** - If checked, displays the organization name in the ticket editor.
- **Require Organization Info** - If checked, requires the organization to be entered in the ticket editor.
- **Require Time** - If checked, requires the time spent working on a ticket to be entered each time the ticket is modified in the ticket editor.
- **Auto Save Clock** - If checked, automatically saves the time spent editing a ticket. Overrides the **Require Time** checkbox and **Show Session Timer** checkbox and hides the **Hours Worked** field and **Timer** buttons in the ticket editor, regardless of **role** (page 43) permissions settings. If unchecked, the **Date**

Desk Definition

Time Started field displays in the **Add Note** (page 28) dialog and when adding a note inside the ticket editor.

- **Enable Incident Notes Panes** - If checked, an extra pane with two tabs displays below the **tickets table** (page 19) showing the selected ticket's **Description** and **Notes**.
- **Enable Service Billing Integration** - if checked, billable entries can be created using the **Service Billing** module and billed in **Service Desk**. See **Creating Billing Entries using Service Desk** (page 18).
- **Enable Session Timers** - If checked and **Auto Save Clock** is not checked, timer buttons display in the **ticket editor** (page 23). See **Time Tracking and Service Desk** (page 14).
- **Enable Task Information** - If checked, the **Task** tab displays in the ticket editor. See **Task Information** (page 17).
- **Log Ticket Changes**
 - **Log Changes** - Generate a note when a field is changed that is visible to users.
 - **Log Changes in Hidden Notes** - Generate a note when a field is changed that is visible to service desk users but hidden from submitters submitting tickets by email and machine users using **Portal Access** (page 13).
 - **Do Not Log Changes**

Standard Field Defaults tab

Service Desk > Desk Definition > New or Edit > Standard Field Defaults tab

The **Standard Field Defaults** tab defines default settings for any new ticket created based on this desk definition. If you create a new value for a standard field that you want to serve as the default value, return to this tab and select it.

Select the default values for the standard fields of a ticket based on the selected desk definition.

- **Status** - The default **status** (page 39).
- **Priority** - The default **priority** (page 39).
- **Category** - The default **category** (page 39).
- **Severity** - The default **severity** (page 39).
- **Resolution** - The default **resolution** (page 40) type.
- **Policy** - The default **policy** (page 42).
- **Email** - The **email reader** (page 62) associated with a service desk. Emails received by this reader are converted into tickets based on this service desk. Overrides the Default Desk Definition setting in the Desk Definition > **General Info** (page 37) tab. Can be overridden using a **Ticket Request Mapping** (page 61) procedure.

Procedures tab

Service Desk > Desk Definition > New or Edit > Procedures tab

These procedures run immediately after a new ticket is created or are scheduled to be run a specified time after the ticket is created. If you create a new procedure that you want to run or schedule when a ticket is created, return to this tab to select it.

- **Ticket Change Procedure** - The default **Ticket Change** procedure. A **Ticket Change** (page 73) procedure runs each time a ticket is changed. Typically **Ticket Change** procedures notify the owner, assignee or submitter that a ticket has been updated.
- **Goal Procedure** - The default **Ticket Goals** procedure. A **Ticket Goals** (page 74) procedure runs after a specified time period, measured from the time a ticket was created. A ticket goal procedure usually records whether or not a ticket goal was met and sets the due date for closing the ticket.

Note: The elapsed time counter for a ticket goal can be **paused** (page 88) and **resumed** (page 88) and the due date can be **set** (page 89) in a procedure.

Note: Each stage of a ticket can also specify and run a *stage* goal procedure.

- **Goal Time** - The number of time-periods to wait before running the goal procedure.
- **Goal Time Units** - The time-period unit of measure.

Properties tab

Service Desk > Desk Definition > Edit > Properties

The **Properties** tab displays tabs for each type of property that can be assigned to a desk definition.

- **Status tab** (page 39)
- **Priority tab** (page 39)
- **Category tab** (page 39)
- **Severity tab** (page 39)
- **Resolution tab** (page 40)
- **Custom Fields tab** (page 40)
- **Task Status Values tab** (page 40)

Properties > Status tab

Define an identifier and description for a status code. Status codes represent the state a ticket is in, regardless of any other classification. Possible types of status codes include: Open, Closed, On Hold, Awaiting User Feedback, Under Investigation, etc.

- **Parent ID** - The name of the desk definition.
- **ID** - The record identifier.
- **Description** - A brief description of this ID.

Properties > Priority tab

Define an identifier and description for a priority code. Priority codes are defined for each desk definition and enable you to prioritize service requests.

- **Parent ID** - The name of the desk definition.
- **ID** - The record identifier.
- **Description** - A brief description of this ID.

Properties > Category tab

Define an identifier and description for a category. Categories and sub-categories can be defined for each desk definition and enable you to classify the type of service requested.

- **Parent ID** - The name of the desk definition.
- **ID** - The record identifier.
- **Description** - A brief description of this ID.
- **Sub Category** - Enter a sub category for this category, then click the **Add Sub Category** button.
- **Sub Categories** - The list of sub categories defined for this category.
- **Delete Sub Category** - Select a sub category in the **Sub Categories** list, then click the **Delete Sub Category** button.

Desk Definition

Properties > Severity tab

Define an identifier and description for a severity code. Severity codes are defined for each desk definition and enable you to classify how critical a service request is to an organization's operations.

- **Parent ID** - The name of the desk definition.
- **ID** - The record identifier.
- **Description** - A brief description of this ID.

Properties > Resolution tab

Define an identifier and description for a resolution. Resolutions are defined for each desk definition and enable you to classify a service request by how the ticket was resolved.

- **Parent ID** - The name of the desk definition.
- **ID** - The record identifier.
- **Description** - A brief description of this ID.

Properties > Custom Fields tab

Add custom fields to this desk definition. When a ticket is created, these custom fields are available for data entry. A corresponding **property variable** (*page 52*) is also created for each custom field you define. You can order the display of custom fields in the ticket editor by using the **Move Up** and **Move Down** buttons.

- **ID** - The record identifier.
- **Screen Caption** - The label for the custom field in windows.
- **Report Title** - The label for the custom field in reports.
- **Field Format** - The data type for the custom field. Includes:
 - **Amt** - Positive or negative number, up to 2 decimal places.
 - **Integer** - Positive or negative number, whole number only.
 - **Quantity** - Positive or negative number, up to 5 decimal places.
 - **Rate** - Positive or negative number, up to 5 decimal places.
 - **Date** - Any date.
 - **Datetime** - Any date and time.
 - **List** - A list of string values. If selected, these additional fields display.
 - ✓ **Value to Add to the List** - Enter a value to add to the list.
 - ✓ **Add Item** - Click to add an entered value to the list.
 - ✓ **Values Added to the List** - Displays a list of values.
 - ✓ **Delete Item** - Click to delete a selected value.
 - **Multiline String** - Displays an edit box that supports multiple lines of text.
 - **String** - Any alphanumeric string value.
 - **Rich Text** - Displays an edit box that supports rich text entry.
 - **Boolean** - Displays a checkbox that is either checked or unchecked. If selected, this additional field displays.
- **Default Value** - The default value for the custom field.

Properties > Task Status Values tab

Define an identifier and description for a task status code. Task status codes represent the state a task is in, regardless of any other classification. Possible types of task status codes include: Open, Closed, On Hold, Awaiting User Feedback, Under Investigation, etc.

- **Parent ID** - The name of the desk definition.

- **ID** - The record identifier.
- **Description** - A brief description of this ID.

Processing tab

[Service Desk](#) > [Desk Definition](#) > [Edit](#) > [Processing](#)

The **Processing** tab provides three tabs that display the *automated behavior of a ticket*, based on its desk definition.

- **View tab** (*page 41*)
- **Stage tab** (*page 41*)
- **Associated Policies tab** (*page 42*)

View tab

[Service Desk](#) > [Desk Definition](#) > [Edit](#) > [Processing](#) > [View](#)

The **View** tab provides a visual display of all stage sequences defined for the desk definition. Stages progress from left to right, branching to multiple stages as defined in the Processing > **Stage** (*page 41*) tab.

Stage tab

[Service Desk](#) > [Desk Definition](#) > [Edit](#) > [Processing](#) > [Stage](#)

Stages are designed to model the flow of work a business performs to process support issues. They are defined by desk definition. One stage is defined as a **Begin** stage and one stage is defined as an **End** stage. There are usually several **Middle** stages.

Stages are *sequenced* by selecting one or more "to" stages. The sequence of stages is user-defined. It depends on the policies defined by the service organization and the judgments of individual users using the system. A sequence of stages is graphically represented by the **View** (*page 41*) tab within a desk definition.

An **event procedure** runs as soon as a ticket transitions from one stage to the next. A **scheduled procedure**, such as an escalation procedure, is triggered to run based on how long a ticket remains in a stage. Escalation procedures run when a system event *does not occur* within a specified time period.

When a desk definition is created, stage sequences are populated by the *template* used to create the desk definition. Once a desk definition is created based on a template, these default stages can be modified to suit your business requirements.

Adding / Editing a Stage

Click **New** to add a new stage or select a stage and click **Edit** to edit a stage. You can also double-click a stage to edit it.

There are two tabs to edit in a stage dialog.

- **General Info** (*page 41*)
- **Procedures** (*page 42*)

Processing > Stage > General Info tab

Enter the following attributes:

- **Name** - The name of the stage.
- **Description** - A brief description of this stage.

Desk Definition

- **Stage Type**
 - **Begin** - The first stage in the life cycle of a response to a ticket. You can only have one **Begin** stage.
 - **Middle** - An interim stage.
 - **End** - The last stage. You can have multiple **End** stages.
- **Goal Procedure** - This **goal** (page 74) procedure runs once the **Goal Time** has been exceeded for this stage.
- **Goal Time** - The number of **Goal Time Units** to wait before running the goal procedure, based on setting a ticket to this stage. This default value can be overridden by a **Stage Entry** procedure.
- **Goal Time Unit** - The time period unit of measure.
- **To Stage** - Select one or more stages that this stage can transition to.

Recommendation: If you're creating an entirely new sequence of stages, create **Middle** stages from an **End** stage back to the **Begin** stage. This enables you select the appropriate **To Stages** at the same time you create each stage.

Processing > Stage > Procedures tab

- **Stage Entry** - This **stage entry** (page 72) procedure runs whenever a ticket enters this stage.
- **Escalation Procedure** - This **escalation** (page 74) procedure runs once the **Escalation Time** has been exceeded.
- **Escalation Time** - The number of **Escalation Time Units** to wait before running the **Escalation** (page 74) procedure, based on setting a ticket to this stage. This default value can be overridden by a **Stage Entry** procedure.
- **Escalation Time Units** - The time period unit of measure.
- **Stage Exit** - This **stage exit** (page 72) procedure runs whenever a ticket exits this stage.

Associated Policies tab

Service Desk > Desk Definition > Edit > Processing > Associated Policies

Policies can be optionally assigned to a ticket *when a new ticket is saved for the first time*. Assigning a policy determines the **hours of coverage** (page 67), the manner of contact accepted by a service desk and the assignment of policy-specific variables. Policy variables can affect how a procedure is run on a ticket.

The **Associated Policies** tab provides a method of automatically assigning one of several policies to a *new* ticket. Each policy added to the **Associated Policies** tab of a desk definition is distinguished by its association with an *organization, organization type, or machine group and operating system combination*.

When a *new* ticket is associated with a machine ID, organization, contact or phone number *and saved for the first time*, a policy can be assigned to the new ticket by looking up *the first policy that matches the ticket associations* listed in the **Associated Policies** tab—in *alphanumeric order of the Policy name column*.

- Selecting a contact name or phone number in a ticket has the effect of selecting that contact's organization.
- Selecting an organization in a ticket has the effect of selecting an organization type, if the organization is a member of the organization type.
- Selecting a machine ID and operating system combination in a ticket has the effect of selecting a machine group, operating system, and organization.

Note: A default policy can be assigned to a new ticket if no other method is used to assign a policy. The default policy is set in *Service Desk > Desk Definition > Properties > General > Standard Field Defaults* (page 38).

Note: See *Automated Processing Using Policies* (page 7).

Enter the following attributes:

- **Parent ID** - Display only. The desk definition name selected in the *middle* pane.
- **Policy** - Select a policy in the list box. The list box is empty if no policies are defined, or if all policies are already added to the desk definition.
- **Type** - Specifies the record type you are associating with this policy.
 - *Machine Group* - Select a machine group using the **Machine Group** field.
 - *Organization* - Select an organization using the the **Org Name** field.
 - *Organization Type* - Select an organization type using the **Org Type** field.
- **Operating System** - Displays only if *Machine Group* is selected. Select one of several classes of operating systems.

Access tab

Service Desk > Desk Definition > Edit > Processing > Access

The **Access** tab specifies the roles and pools of users that has access to the desk definition and its tickets.

- **Roles tab** (page 43)
- **Pools tab** (page 43)

Roles tab

Service Desk > Desk Definition > Edit > Processing > Access > Roles

Service Desk > Desk Definition > Role Preferences > Service Desks tab

Field permissions are set by role. For VSA users using roles linked to the *Service Desk Technicians* role type, **field permissions** determine what fields a user can view or edit within the ticket editor or KB article editor. Typical field permissions include: *Editable, View Only, Hidden, or Required*. Default field permissions are set by **editing template** (page 119).

Note: VSA users using a role linked to the *Service Desk Administrators* role type can see and work with any field in any ticket editor or KB article editor. *Master role* users also always have complete field permission access, regardless of roletype assignment.

Action buttons include:

- **Assign** - Associate a role with the desk definition and edit field permissions for each field.
- **Change** - Edit the field permissions for each field in the desk definition.
- **Delete** - Remove the association between the role and the desk definition.

See **Role Preferences - Service Desks tab** (page 59) for more information.

Pools tab

Service Desk > Desk Definition > Edit > Processing > Access > Pools

Users can be assigned to **pools** of users, regardless of the roles they belong to. Tickets can be assigned to pools using the **Assigned To** field in the editor, or by procedure using the `Assign Ticket Property > Pool` command. When a user in that pool opens the ticket, the ticket is automatically *reassigned* to the individual user.

- **ID** - The identifier for the pool of users.
- **Description** - A brief description of the pool.
- **Filter by Role** - Filters the users in the left hand pane by user role.
- Use the **>** button to added selected users in the left side list *to* the pool.
- Use the **<** button to remove selected users in the right side list *from* the pool.

Templates

The **Templates** folder contains functions that create and maintain templates for desk definitions, notes and messages.

- **Desk Templates** (page 44) - Provides sample **desk templates** to help you get started using **Service Desk** as quickly as possible.
- **Note Templates** (page 50) - Defines blocks of static text that can be appended to a note while editing a ticket.
- **Message Templates** (page 51) - Defines reusable, standard messages you can send as emails or display as messages in the **Inbox** of other users.

Desk Templates

Service Desk > Desk Templates

The **Desk Templates** page provides the following sample **desk templates** to help you get started using **Service Desk** as quickly as possible. Each desk template is configured to support one of several business processes required by IT organizations. You can modify any of these sample desk definitions and put them into production, or install them just to learn how to create your own desk definitions from scratch. Once installed, none of the changes you make will be overwritten by subsequent updates or hotfixes.

- **Basic Customer Service Desk** (page 44)
- **Automated Customer_Service Desk** (page 45)
- **Knowledge Base** (page 50)
- **Incident Management Desk** (page 46)
- **Problem Management Desk** (page 48)
- **Change Request Desk** (page 49)

Setup Customer_SD_Basic

The `Customer_SD_Basic` is a basic ticket support desk with sample tickets. *This service desk requires no other configuration to get started.* If you need to get started as quickly as possible—without making use of **Service Desk**'s automation features—this is the one to use.

Configuration

1. **Create the Desk** - Click the **Install Desk** button for the `Basic Customer Service Desk` using `Service Desk > Desk Templates`.
2. **Assign Users to User Roles** - Assign users requiring access to the **Service Desk** module to user roles—such as `SD User` or `SD Admin`—that use the `Service Desk Administrators` or `Service Desk Technicians` role type.
3. **Associate the Desk with User Roles** - *This service desk is automatically associated with the `SD User` role.* If you assign users to a user role that uses the `Service Desk Technicians` role type, you must associate this desk with that user role using **Role Preferences** (page 57) or the `Desk Definition > Access > Roles` (page 43) tab.
This step is not necessary for users assigned to user roles—such as `SD Admin`—that use the `Service Desk Administrators` role type.
4. **Assign the Desk to Scopes** - Assign this desk to the *scopes* of users who use roles—such as `SD User`—that use the `Service Desk Technicians` role type.
This step is not necessary for users assigned to user roles—such as `SD Admin`—that use the `Service Desk Administrators` role type.
5. **Verify Outbound Email is Enabled** - Ensure that *outbound* emails are enabled using `System > Outbound Email`.
6. **Create an Inbound Email Reader** - Create an email reader using the `Service Desk > Incoming Email and Alarm Settings > Readers` (page 62) tab. This enables tickets to be created when *inbound* emails are received. Ensure emails received by this reader are converted into tickets for this service desk by linking the email reader to the service desk using the `Desk Definition > New or Edit > General > Standard Field Defaults` (page 38) **Email** field. You can override this default association using a **Ticket Request Mapping** (page 73) procedure.
7. **Activate Service Desk** - Alarm generated tickets can be configured to create tickets using this desk. Use `Service Desk > Incoming Email and Alarm Settings > General` (page 62) tab to specify `Customer_SD_Basic` as the service desk to use when tickets are created from alarms. Then use `Service Desk > Global Settings` to **activate** (page 56) **Service Desk**.

Setup Customer_SD_Automation

The `Customer_SD_Automation` service desk provides basic automation with a simplified workflow. Automation in this service desk demonstrates email and message notification to users and user pools when a ticket is created, starts a new stage or is escalated. **Minimal configuration is required to use this service desk.**

Note: See **How Stages Work** (page 6) for a description of each stage in the `Customer_SD_Automation` service desk.

Configuration

1. **Create the Desk** - Click the **Install Desk** button for `Automated Customer Service Desk` using `Service Desk > Desk Template`.
2. **Assign Users to User Roles** - Assign users requiring access to the **Service Desk** module to user roles—such as `SD User` or `SD Admin`—that use the `Service Desk Administrators` or `Service Desk Technicians` role type.
3. **Associate the Desk with User Roles** - *This service desk is automatically associated with the `SD User` role.* If you assign users to a user role that uses the `Service Desk Technicians` role type, you must associate this desk with that user role using **Role Preferences** (page 57) or the `Desk Definition > Access > Roles` (page 43) tab.
This step is not necessary for users assigned to user roles—such as `SD Admin`—that use the

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Service Desk Administrators role type.

4. **Assign the Desk to Scopes** - Assign this desk to the *scopes* of users who use roles—such as SD User—that use the Service Desk Technicians role type.
This step is not necessary for users assigned to user roles—such as SD Admin—that use the Service Desk Administrators role type.
5. **Assign Users to Pools** - Assign users to the following user pools within the Customer_SD_Automation service desk. You assign users to user pools using Service Desk > Desk Definition > Access > **Pools** (page 43).
 - Tier1Support
 - Tier2Support
6. **Configure Procedure Variables** - Enter email addresses, as appropriate, in the value fields for the following procedure variables using Service Desk > **Procedure Variables** (page 65).
 - Email_Tier1Support - These email addresses correspond to the same users added to the Tier1Support pool.
 - Email_Tier2Support - These email addresses correspond to the same users added to the Tier2Support pool.
 - Email_KaseyaServer - Enter a single "From" email address.Multiple email recipients should be separated by semi-colons, for example:
jsmith@acme.com;fgorham@acme.com;twinners@consultants.com.
7. **Verify Outbound Email is Enabled** - Ensure that *outbound* emails are enabled using System > **Outbound Email**.
8. **Create an Inbound Email Reader** - Create an email reader using the Service Desk > Incoming Email and Alarm Settings > **Readers** (page 62) tab. This enables tickets to be created when *inbound* emails are received. Ensure emails received by this reader are converted into tickets for this service desk by linking the email reader to the service desk using the Desk Definition > New or Edit > General > **Standard Field Defaults** (page 38) > **Email** field. You can override this default association using a **Ticket Request Mapping** (page 73) procedure.
9. **Activate Service Desk** - Alarm generated tickets can be configured to create tickets using this desk. Use Service Desk > Incoming Email and Alarm Settings > **General** (page 62) tab to specify Customer_SD_Automation as the desk definition to use when tickets are created from alarms. Then use Service Desk > Global Settings to **activate** (page 56) **Service Desk**.
10. **Modify CS Message Templates** - You may wish to update the message templates used by the Customer_SD_Automation using Service Desk > **Message Templates** (page 51). These message templates are all identified with a CS prefix.

Setup Incident Service Desk

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

Note: See **Service Desk Priority Calculations** (page 75) for an explanation of how the Incident service desk sets priorities using a sub-procedure.

Prerequisites

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

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

Configuration

1. **Create the Desk** - Click the **Install Desk** button for the `Incident Management Desk` using Service Desk > **Desk Templates**.
2. **Assign Users to User Roles** - Assign users requiring access to the **Service Desk** module to user roles—such as `SD User` or `SD Admin`—that use the `Service Desk Administrators` or `Service Desk Technicians` role type.
3. **Associate the Desk with User Roles** - *This service desk is automatically associated with the `SD User` role.* If you assign users to a user role that uses the `Service Desk Technicians` role type, you must associate this desk with that user role using **Role Preferences** (page 57) or the `Desk Definition > Access > Roles` (page 43) tab.
This step is not necessary for users assigned to user roles—such as `SD Admin`—that use the `Service Desk Administrators` role type.
4. **Assign the Desk to Scopes** - Assign this desk to the `scopes` of users who use roles—such as `SD User`—that use the `Service Desk Technicians` role type.
This step is not necessary for users assigned to user roles—such as `SD Admin`—that use the `Service Desk Administrators` role type.
5. **Assign Organization to Organization Types** - Assign customer organizations to one of the following organization types using System > Orgs/Groups/Depts > **Manage** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?4017.htm>).
 - `Gold_SLA`
 - `Silver_SLA`
 - `Bronze_SLA`
6. **Assign Users to Pools** - Assign *all* review team members to *each* of the following user pools within the `Incident` desk. This allows your review team to see each step in the life cycle of a ticket. Once your review team is familiar with the entire life cycle, you can assign different users to different user pools. You assign users to user pools using Service Desk > Desk Definition > Access > **Pools** (page 43). *Your review team members can expect to be continually notified by VSA inbox messages about the status of each incident as it progresses through its life cycle.*
 - `Tier1Support`
 - `Tier2Support`
 - `Tier3Support`
 - `SupportManagement`
7. **Configure Procedure Variables** - Change the value of the `Email_ReviewTeam` procedure variable from its default generic value to a series of review team email addresses. Procedure variables are maintained using Service Desk > **Procedure Variables** (page 65).
For example, you could change the value to

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`jsmith@acme.com;fgorham@acme.com;twinters@consultants.com`. This procedure variable is referenced by other procedure variables. It sets the **To:** address of all `sendEmail()` commands in all procedures run by the `Incident` sample service desk. *Your review team members can expect to be continually notified by email about the status of each incident as it progresses through its life cycle.*

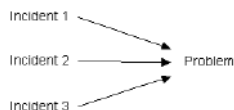
Once your review team is familiar with the entire life cycle of an incident, you can re-assign different values to the following procedure variables:

- `Email_Tier1Support` - These email addresses correspond to the same users added to the `Tier1Support` pool.
 - `Email_Tier2Support` - These email addresses correspond to the same users added to the `Tier2Support` pool.
 - `Email_Specialists` - These email addresses correspond to the same users added to the `Tier3Support` pool.
 - `Email_SupportManagement` - These email addresses correspond to the same users added to the `SupportManager` pool.
 - `Email_KaseyaServer` - Enter a single "From" email address.
8. **Verify Outbound Email is Enabled** - Ensure that *outbound* emails are enabled using `System > Outbound Email`.
 9. **Create an Inbound Email Reader** - Create an email reader using the `Service Desk > Incoming Email and Alarm Settings > Readers (page 62) tab`. This enables tickets to be created when *inbound* emails are received. Ensure emails received by this reader are converted into tickets for this service desk by linking the email reader to the service desk using the `Desk Definition > New or Edit > General > Standard Field Defaults (page 38) > Email field`. You can override this default association using a `Ticket Request Mapping (page 73) procedure`.
 10. **Activate Service Desk** - Alarm generated tickets can be configured to create tickets using this desk. Use `Service Desk > Incoming Email and Alarm Settings > General (page 62) tab` to specify `Incident` as the desk to use when tickets are created from alarms. Then use `Service Desk > Global Settings >` to **activate (page 56)** the **Service Desk**.
 11. **Modify Message Templates** - You may wish to update the message templates used by the `Incident` using `Service Desk > Message Templates (page 51)`. These message templates do *not* have a `CS` prefix.

Setup Problem Service Desk

The `Problem` desk, based on ITIL guidelines, demonstrates the benefits of analyzing and resolving broadly-based product or service problems separately from immediate customer support issues. Problem tickets can be associated with multiple issues. When a solution is identified, customers with related issues can be notified.

When multiple organization/contacts have reported a similar type of incident, it can be easier to manage a response to those incidents by linking them to a single problem ticket. This can apply regardless of whether the incidents are questions/known errors, suggestions, or unknown errors. The problem ticket restates the reported incidents in a generic way that applies to anyone faced with the same set of conditions. For example the title of a problem ticket could be: `Cannot apply printer drivers to mapped drives`.



Configuration

1. **Create the Desk** - Click the **Install Desk** button for the Problem Management Desk using Service Desk > **Desk Templates**.
2. **Assign Users to User Roles** - Assign users requiring access to the **Service Desk** module to user roles—such as SD User or SD Admin—that use the Service Desk Administrators or Service Desk Technicians role type.
3. **Associate the Desk with User Roles** - *This service desk is automatically associated with the SD User role.* If you assign users to a user role that uses the Service Desk Technicians role type, you must associate this desk with that user role using **Role Preferences** (page 57) or the Desk Definition > Access > **Roles** (page 43) tab.

This step is not necessary for users assigned to user roles—such as SD Admin—that use the Service Desk Administrators role type.

4. **Assign the Desk to Scopes** - Assign this desk to the *scopes* of users who use roles—such as SD User—that use the Service Desk Technicians role type.

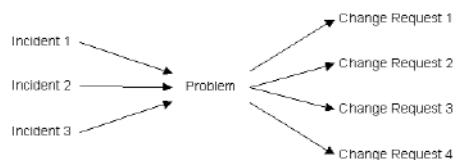
This step is not necessary for users assigned to user roles—such as SD Admin—that use the Service Desk Administrators role type.

5. **Verify Outbound Email is Enabled** - Ensure that *outbound* emails are enabled using System > **Outbound Email**.

Setup Change Requests Service Desk

The Change Request desk is based on ITIL guidelines. Change requests have their own life-cycle, not necessarily related to customer support issues. Change requests are approved or rejected. If approved, then the change request is tracked through to successful completion. Change requests can be associated with multiple incidents reported by customers. When the change request is implemented, customers with related incidents can be notified.

A change request ticket describes a change to a product or service. They don't involve organization/contacts or problems directly. Instead they describe, in technical detail, exactly what aspect of the product or service has to be changed. Change requests can be created internally, or can be associated with a problem ticket. Frequently a single problem ticket can be the source of multiple change requests.



Configuration

1. **Create the Desk** - Click the **Install Desk** button for the Change Request Desk sample service desk using Service Desk > **Desk Templates**.
2. **Assign Users to User Roles** - Assign users requiring access to the **Service Desk** module to user roles—such as SD User or SD Admin—that use the Service Desk Administrators or Service Desk Technicians role type.
3. **Associate the Desk with User Roles** - *This service desk is not automatically associated with any user role.* If you assign users to a user role that uses the Service Desk Technicians role type, you must associate this desk with that user role using **Role Preferences** (page 57) or the Desk Definition > Access > **Roles** (page 43) tab.

This step is not necessary for users assigned to user roles—such as SD Admin—that use the Service Desk Administrators role type.

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4. **Assign the Desk to Scopes** - Assign this desk to the *scopes* of users who use roles—such as SD User—that use the *Service Desk Technicians* role type.
This step is not necessary for users assigned to user roles—such as SD Admin—that use the *Service Desk Administrators* role type.
5. **Verify Outbound Email is Enabled** - Ensure that *outbound* emails are enabled using *System > Outbound Email*.

Setup Knowledge Base

The *Knowledge Base* desk, based on ITIL guidelines, serves as a repository of known errors and recommended solutions. The **Search All** (*page 34*) feature in *Service Desk* lets you perform a single search to find matching text in any service desk ticket and any KB article.

Configuration

1. **Create the Desk** - Click the **Install Desk** button for the *Knowledge Base* desk using *Service Desk > Desk Templates*.
2. **Assign Users to User Roles** - Assign users requiring access to the **Service Desk** module to user roles—such as SD User or SD Admin—that use the *Service Desk Administrators* or *Service Desk Technicians* role type.
3. **Associate the Desk with User Roles** - If users only need to have view-only access to KB articles that are in the *Published* stage, this step is not required for any user role. If you want non-service desk administrators to be able to create a new KB article and edit the KB article, but don't want those same users complete service desk administrator access, select or create a user role associated with the *Service Desk Technicians* role type. Then associate the knowledge base with the user role using **Role Preferences** (*page 57*) or the *Desk Definition > Access > Roles* (*page 43*) tab. Then assign users to that user role. The *KB Admin* user role can be used for this purpose. The *KB Admin* is already associated with the *KnowledgeBase* desk. You only need to remove the *Service Desk Administrator* roletype from the *KB Admin* user role.
This step is not necessary for users assigned to user roles—such as SD Admin—that use the *Service Desk Administrators* role type.
4. **Create Knowledge Base Articles** - See **Knowledge Base** (*page 33*) for instructions on *creating KB articles*.

Note: Without any further configuration, all users using non-administrator roles—such as SD User that use the *Service Desk Technicians* role type—can see any *KnowledgeBase* article set to the *Published* stage.

5. **Display Knowledge Base Articles in Live Connect** - See **Integrating Service Desk, Live Connect, and Portal Access** (*page 13*) for instructions on displaying KB articles in *Live Connect* and *Portal Access*.











Note Templates

Service Desk > Configure > Note Templates

The **Note Templates** page defines blocks of static text that can be appended to a note while editing a ticket. After creating the note template, you can select it from the ticket editor **Note Template** drop-down list in the **Add Note** section of the **Notes** tab.

Adding / Editing a Note Template

Click **New** to display the **Add Note Template** window, or click a row in the *middle* panel, then click **Edit** to display the **Edit Note Template** window. Enter the following attributes:

- **Name** - The name of the note template.
- **Prompt** - A brief description of the note template. This text displays in the drop-down list of note templates when you are editing a note.
- **Response** - Enter the block of static text that will be entered into a note when you select this note template in a ticket. Use the following toolbar buttons to add special formatting to the text:
 -  - Hyperlink selected text. You may need to reset links copied and pasted from another source.
 -  - Copy selected text from Microsoft Word and paste into text pane.
 -  - Insert a table.
 -  - Insert a horizontal line as a percentage of the width, or set a fixed width in pixels.
 -  - Indent text.
 -  - Outdent text.
 -  - Set selected text to subscript.
 -  - Set selected text to superscript.
 -  - Remove formatting of selected text.
 -  - Insert special characters and symbols.

Note: You can not add an attachment to a note template.

Message Templates

Service Desk > Configure > Message Templates

The **Message Templates** page defines reusable, standard messages you can send as emails or display as messages in the **Inbox** of other users. These message templates can be selected when you specify a **sendEmail()** step or **sendMessage()** step within *any* service desk procedure. Message templates can also include ticket **property variables** (page 52) and **procedure variables** (page 65).

Note: **Service Desk** installs pre-defined message templates. These pre-defined message templates are used by one or more pre-configured service desks and procedures installed using the **Desk Templates** (page 44) page. You can change their contents and your changes will be preserved. But if you rename or delete these pre-defined message templates they will be re-created during the next **maintenance cycle** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?248.htm>) of the VSA.

General

Click **New** to display the **Add Message Template** window, or click a row in the *middle* panel, then click **Edit** to display the **Change Message Template** window. Enter the following attributes:











- **ID** - The name of the message template.
- **Description** - A brief description of this ID.

Note: Any value you enter in the following four fields can be overridden by a value in the corresponding fields of a **sendMessage()** or **sendEmail()** step in a procedure.

- **Subject** - The subject of the message template.
- **To** - The recipients of the message template. Multiple recipients are delimited by commas or semicolons.

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Note: Any user name included in the To field of a message template is automatically converted into that user's corresponding email address. For example, if the user `jsmith` has a corresponding email address of `jsmith@acme.com`, then the same message template—with `jsmith` in the To field—can be used by a `sendMessage()` step to send a message to `jsmith` and also used by a `sendEmail()` step to send an email to `jsmith@acme.com`. Email addresses for each user are maintained using `System > Users`.

- **From** - The sender of the message template. The From address of an outbound email is specified using the following order of precedence:
 1. If there is a From address in the `sendEmail()` step of a procedure, then that address is used.
 2. Else the `sendEmail()` step uses the From address provided by a linked Service Desk > **Message Template**, if the link exists and a From address is specified.
 3. Else the `sendEmail()` step uses the **Reply Email Address** of the Service Desk > **Incoming Email and Alarm Settings** > email reader linked to the service desk. This link between the email reader and the service desk is set using the Service Desk > Desk Definition > Properties > General > **Standard Field Defaults** (*page 38*) > Email field.
 4. Else the **Default Sender Email** address set in System > **Outbound Email** is used.
- **Body** - Enter the body text of the message template. Use the following toolbar buttons to add special formatting to the text:
 -  - Hyperlink selected text. You may need to reset links copied and pasted from another source.
 -  - Copy selected text from Microsoft Word and paste into text pane.
 -  - Insert a table.
 -  - Insert a horizontal line as a percentage of the width, or set a fixed width in pixels.
 -  - Indent text.
 -  - Outdent text.
 -  - Set selected text to subscript.
 -  - Set selected text to superscript.
 -  - Remove formatting of selected text.
 -  - Insert special characters and symbols.

Note: You can not add an attachment to a message template.

Standard and Custom Property Variables

Property variables can be used in message templates and note templates, when bracketed using [`$` and `$`] notation. These corresponding property variables can also be referenced in service procedures. Variable names are case sensitive. Custom field property variables are also supported.

Note: See **Working with Variables** (*page 71*) for an overview of variables in service desk procedures.

Note: See **Standard Fields** (*page 30*) for a list of standard fields and their corresponding property variables.

Note: See **Receipt Property Variables** (*page 54*) for a list property variables that apply to ticket requests created using inbound emails and alerts.

- [`$ActualTaskHours$`] - The total number of hours worked while working on tasks within a ticket.

- [\$AgentGuid\$] - When a ticket is associated with an agent, this is the unique ID of the agent.
- [\$AllNotes\$] - Displays the entire history of all hidden notes and non-hidden notes.
- [\$AllPublicNotes\$] - Displays the entire history of non-hidden notes.
- [\$ArchiveFlag\$] - If true, this ticket is archived.
- [\$Assignee\$] - The VSA user currently assigned to the ticket.
- [\$AssigneeEmailAddress\$] - The email of the assignee assigned the ticket.
- [\$Category\$] - The **category** (page 39) assigned to the ticket.
- [\$Changes\$] - Displays a summary of changes as plain text, including any newly added note. Applies to public notes only.
- [\$ChangesAsHtml\$] - Displays a summary of changes in HTML, including any newly added note. Applies to public notes only.
- [\$ClosedDateTime\$] - The date/time the ticket was closed.
- [\$CreateDateDateTime\$] - The creation date/time of the ticket.
- [\$Description\$] - The description of the ticket.
- [\$EditingUserName\$] - The user who last edited the ticket.
- [\$EscalationDateTime\$] - The date/time the ticket will be **escalated** (page 74) if it does not exit the current stage.
- [\$EscalationLevel\$] - The current **escalation level** (page 74) for this ticket within the current stage.
- [\$EstimatedTaskHours\$] - The estimated number of hours for all **tasks** (page 17) within the ticket.
- [\$ExpectedDueDate\$] - The **goal** (page 74) date/time for the entire ticket.
- [\$FullMachineName\$] - The fully qualified machine name and group. Equivalent to using [\$Machine\$] . [\$MachineGroup\$] . Typically used with the **scheduleProcedure()** step in a procedure to run an agent procedure.
- [\$GoalDateTime\$] - The **goal** (page 74) date/time the ticket will be overdue if it does not exit the current stage.
- [\$LastEditDateTime\$] - The date/time the ticket was last edited.
- [\$LastPublicUpdate\$] - The date/time that a **non-hidden note** (page 26) was last added to the ticket.
- [\$Machine\$] - The machine ID associated with this ticket.
- [\$MachineGroup\$] - The machine group of the machine ID associated with the ticket.
- [\$Manager\$] - The *supervisor* of a staff member associated with a ticket. See **Working with Variables** (page 71) for instructions on how to use this property variable.

Note: This is not the same as the *manager of the department* the staff member belongs to.

- [\$Organization\$] - The **organization ID** (page 26) assigned to the ticket.
- [\$Owner\$] - The VSA user ultimately responsible for resolving the ticket.
- [\$OwnerEmailAddress\$] - The email address of the owner of the ticket.
- [\$PolicyName\$] - The name of the **policy** (page 42) assigned to the ticket.
- [\$Pool\$] - The **pool** (page 121) of VSA users assigned to the ticket.
- [\$PreviousStage\$] - The stage the ticket was previously assigned.
- [\$Priority\$] - The **priority** (page 39) assigned to the ticket.
- [\$ProjectedDate\$] - The date promised to resolve the ticket.
- [\$ReadFlag\$] - If true, no user has viewed the ticket yet. If false, at least one user has viewed the ticket.
- [\$RelatedTicketsAsBulletedList\$] - Returns a bulleted list of related tickets.

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- [`RelatedTicketsAsString`] - Returns a comma separated list of ticket IDs with their summary descriptions.
- [`Resolution`] - Displays the **resolution** (page 40) assigned to the ticket.
- [`ResolutionDateTime`] - The date/time the ticket was resolved.
- [`ResolutionText`] - Descriptive text entered with a resolution code.
- [`ServiceDesk`] - The **service desk** (page 24) used to create the ticket.
- [`Severity`] - The **severity** (page 39) assigned to the ticket.
- [`SourceType`] - Applies to tickets generated from an email or a system event, such as an alarm.
 - Email - Ticket was created from an email
 - Backup
 - KES
 - Patch
 - Monitor
 - Alarm
 - Portal
 - ServiceDesk
 - Other
- [`Staff`] - Displays as the **Contact** field in the ticket editor. A contact is a staff member of an organization.
- [`StaffEmail`] - Displays the contact's email value.
- [`StaffPhone`] - Displays the contact's phone number.
- [`Stage`] - The **stage** (page 41) assigned to the ticket.
- [`StageStartDateTime`] - The start date/time of the current **stage** (page 41) of the ticket.
- [`Status`] - The **status** (page 39) assigned to the ticket.
- [`SubCategory`] - The **subcategory** (page 39) assigned to the ticket.
- [`SubmitterEmailAddress`] - The email address of the submitter.
- [`SubmitterName`] - The name of the person submitting the ticket. Usually this is the name of the user calling or emailing about a service issue.
- [`SubmitterType`] - The type of person who created the ticket. A **PARTICIPANT** is a VSA user. A **USER** is a non-VSA user.
- [`Summary`] - A one line summary description of the ticket.
- [`TicketId`] - The unique identifier for the ticket. This value cannot be changed.
- [`TicketURL`] - Provides a link to the ticket in an email or message.
- [`TotalHoursWorked`] - The total hours worked on the ticket.
- [`WorkOrder`] - The **work order** (page 122) associated with the ticket.
- [`WorkOrderName`] - The name of the work order associated with the ticket.
- [`WorkOrderNumber`] - The number of the work order associated with the ticket.
- [`WorkPerformedDateTime`] - The date and time work was performed on the ticket. This value is independent of the entries entered for hours worked.

Custom Property Variables

Custom field property variables are also supported. Use the **Assign Ticket Custom Field** (page 85) command in service procedures to return or set their values. Uses the format [`customfieldId`]. Examples include:

- [`ReasonforChange`]

- [\$BusinessAspectsofChange\$]
- [\$TechnicalImpact\$]

Receipt Property Variables

Receipt property variables are a special set of property variables that apply only when a ticket request is created using an inbound alert or email using **Incoming Email and Alarm Settings** (page 61). They can be:

- Tested using the **Test Property Value of the Receipt** (page 82) in **Ticket Request Mapping**.
- Embedded in **Message Templates** (page 51) when bracketed using [\$ and \$] notation. The message template must be referenced by a **Ticket Request De-Dup** (page 73) and **Ticket Request Mapping** (page 73) service procedures.
- Embedded in the edit fields of other **Ticket Request De-Dup** and **Ticket Request Mapping** service procedure commands. *These are the only two service procedures that can use them.*

Note: See **Working with Variables** (page 71) for an overview of variables in service desk procedures.

Note: See **Standard and Custom Property Variables** (page 52) for a list of standard property variables.

Note: See the **Readers tab** (page 62) for an explanation of how tilda (~) commands are used in the subject or body of an inbound email to set the value of a ticket or note. Some of these tilda (~) commands can set the value of the receipt property variables listed here.

- [\$Assignee\$] - The VSA user currently assigned to the ticket.
- [\$Body\$] - The body text of the email or alert.
- [\$Category\$] - The **category** (page 39) assigned to the ticket.
- [\$Hidden\$] - Always false for ticket requests creating a new ticket. When replying to an outbound ticket, including a ~hide string in the subject or body of the reply email will causes the reply message to be converted into a hidden note.
- [\$ID\$] - The unique ID of the ticket request. Not intended for use in procedures.
- [\$IsTicketRequest\$] - True if created by a system event instead of by an inbound email.
- [\$Machine\$] - The machine ID associated with this ticket.
- [\$MachineGroup\$] - The machine group of the machine ID associated with the ticket.
- [\$Organization\$] - The **organization ID** (page 26) assigned to the ticket.
- [\$PartitionID\$] - The **partition** (page 121) the ticket request was directed to. Not intended for use in procedures.
- [\$Priority\$] - The **priority** (page 39) assigned to the ticket.
- [\$ServiceDesk\$] - The **service desk** (page 24) used to create the ticket.
- [\$Severity\$] - The **severity** (page 39) assigned to the ticket.
- [\$SolutionType\$] - The **resolution** (page 40) of the ticket.
- For the following property variables see **Test Property Value of the Receipt** (page 82) in **Ticket Request Mapping**.
 - [\$SourceTag1\$]
 - [\$SourceTag2\$]
 - [\$SourceTag3\$]
 - [\$SourceType\$]
 - [\$SourceValue1\$]
 - [\$SourceValue2\$]
 - [\$SourceValue3\$]

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- [{\$Staff\$}] - Displays as the **Contact** field in the ticket editor. A contact is a staff member of an organization.
- [{\$Status\$}] - The **status** (page 39) assigned to the ticket.
- [{\$SubCategory\$}] - The **subcategory** (page 39) assigned to the ticket.
- [{\$Subject\$}] - The subject line of the email or alert.
- [{\$SubmitterEmail\$}] - The email address of the submitter.
- [{\$SubmitterName\$}] - The name of the person submitting the ticket. Usually this is the name of the user calling or emailing about a service issue.
- [{\$SubmitterPhone\$}] - The submitter's phone number.
- [{\$TargetEmailAddr\$}] - The email address the inbound email was addressed to.

Common Configuration

Service Desk > Configure

The **Configure** folder contains a set of user defined support tables that *can be used by multiple desk definitions and their tickets*.

Note: Many of the following configuration tables are populated when **Service Desk** is installed, or when you create a service desk using the **Desk Templates** (page 44) page.

- **Global Settings** (page 56) - Defines global settings that apply to the entire **Service Desk** module.
- **Role Preferences** (page 57) - Defines ticket editing preferences and field permissions by *user role*.
- **User Preferences** (page 60) - Defines ticket editing preferences and field permissions by *user*.
- **Incoming Email and Alarm Settings** (page 61) - Creates email readers used to retrieve email messages from email servers and convert them into tickets.
- **Procedure Variables** (page 65) - Defines procedure variables, including variables associated with service desk policies.
- **Policies** (page 65), **Coverage Schedules** (page 67) and **Holidays** (page 68) - Defines service policies.

Global Settings

Service Desk > Common Configuration > Global Settings

The **Global Settings** page sets options that apply to the entire **Service Desk** module.

Actions

- **Edit** - Edits global settings for the **Service Desk** module.
 - **Activate Service Desk** - Check to *activate* (page 56) **Service Desk**. Uncheck to *deactivate* **Service Desk**.
 - Use the color picker to select the background color for each type of note.
 - ✓ **Hidden Note Color** - Hidden ticket notes do not notify the submitter by email and hide the note from machine users viewing the ticket using **Portal Access** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?438.htm>).
 - ✓ **System Note Color** - A note created by a system event, such as the start of a service procedure.
 - ✓ **Task Note Color** - A note created for a task within a ticket.

- ✓ **Hidden Task Note Color** - Hidden task notes do not notify the submitter by email and hide the note from machine users viewing the ticket using **Portal Access**.
- ✓ **Normal Note Color** - The color displayed by public notes for the entire ticket.

Activation

Service Desk > Common Configuration > Global Settings

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

Activation of **Service Desk** integration can be done at any time before or after **Service Desk** configuration. Typically **Service Desk** is configured before activation.

You must perform all three steps below to enable system events to create new tickets in **Service Desk**.

1. The **Service Desk** module must be **activated** (page 56) to process ticket requests from system events using Service Desk > Common Configuration > **Global Settings** (page 56).
2. **Incoming Email and Alarm Settings** must be *enabled*.

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

3. Specify the desk definition used to create the ticket, in any *one of the following three ways*:
 - a. Optionally set the **Default** desk definition in Service Desk > **Desk Definition** (page 35).
 - b. Optionally set the **Alarm Default Service Desk** in Service Desk > Incoming Email and Alarm Settings. Has precedence over the **Default** desk definition.
 - c. Optionally specify a unique **Ticket Request De-Dup** (page 73) or **Ticket Request Mapping** (page 73) procedure to process ticket requests from system events. Set using the Service Desk > Incoming Email and Alarm Settings > **General** (page 62) tab. Has precedence over the **Default** desk definition and the **Alarm Default Service Desk** setting. See the **Test Property Value of the Receipt** (page 82) command for details on testing the property values of ticket requests, including the *source* system event of the ticket request. This IF command is only available in a **Ticket Request Mapping** procedure.

Note: See the Incoming Email and Alarm Settings > **Readers** tab (page 62) to create tickets based on inbound email.

Deactivation

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

Disabling the Ticketing Email Reader

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

Role Preferences

[Service Desk](#) > [Configure](#) > [Role Preferences](#)

The [Role Preferences](#) page defines ticket preferences by role. [Role Preferences](#) can be overridden by [User Preferences](#) (page 60). [Role Preferences](#) includes:

- Email send delay
- Color coding of tickets in the tickets selector table.
- Columns displayed by default in the tickets selector table.
- Field permissions in the ticket editor by user role and desk definition.

[Role Preferences](#) tabs are organized as follows.

- [General tab](#) (page 58)
 - [Role Properties tab](#) (page 58)
 - [Default Columns tab](#) (page 59)
- [Service Desks tab](#) (page 59)

Role Preferences - General tab


[Service Desk](#) > [Role Preferences](#) > [General tab](#)

Click a row in the middle panel, then click [Edit](#) to display the [Change Ticket Preferences for Role](#) window. This dialog has two tabs.

- [Role Properties tab](#) (page 58)
- [Default Columns tab](#) (page 59)

General tab > Role Properties tab

Misc. Preferences

- [Email Send Delay \(Mins\)](#) - Pending email notification of selected tickets can be stopped using [Stop Notification in Tickets](#) (page 19). This option is used in conjunction with [Email Send Delay](#) in [Role Preferences](#) (page 57) and [User Preferences](#) (page 60). For example, if [Email Send Delay](#) is set to 5 minutes for the role you are using, then you have 5 minutes to cancel any emails that are pending for a ticket using [Stop Notification](#). Applies to ticket rows displaying a  icon in the icon column of the ticket table. [Stop Notification](#) only stops currently pending email.

Color Preferences

Set the color codes for ticket rows displayed in tickets tables, based on a [Date Range benchmark](#). Available benchmarks include:

- [Last Date Modified](#) - The date the ticket was last modified.
- [Due Date](#) - The due date of the *current stage* of a ticket. The due date for the current stage of a ticket can only be used if a goal procedure is linked to that stage using the [Desk Definition > Processing > Stage > Procedures](#) (page 42) tab.
- [Creation Date](#) - The creation date of the ticket.
- [Promised Date](#) - The promise date of the ticket.

Ticket Age

For the selected date range benchmark you can select three colors:

- **Older than** - Enter the number of days *before* the selected date range benchmark to color code tickets. Use the color picker to select a color. For example, you might want to color code the oldest tickets as *red*.
- **Between** - Use the color picker to select a color. For example, you might want to color intermediate tickets as *yellow*.
- **Newer than** - Enter the number of days *after* the selected date range benchmark to color code tickets. Use the color picker to select a color. For example, you might want to color recent tickets as *green*.

General tab > Default Columns tab

Select the columns displayed in the ticket selector table and the order they are displayed.

1. Use **Ctrl+Click** or **Shift+Click** to select multiple items in the left-hand listbox.
2. Click the right arrow button to move them to the right hand listbox.
3. Re-order the display of columns in the right-hand listbox by clicking the up arrow or down arrow buttons.
4. Click **Save** to save your default column preferences.

Note: Adhoc changes you make to column selections in the **Tickets** (page 19) table are always remembered, even between sessions. To reset column selections back to **Role Preferences** settings, click the **Defaults** button in **System > Preferences**. This resets *all* your user preferences throughout the VSA back to their default settings.

Role Preferences - Service Desks tab

Service Desk > Role Preferences > Service Desks tab

Service Desk > Desk Definition > Edit > Processing > Access > Roles

Click a row in the middle panel, then click the **Service Desk** tab to assign, change or remove the association between a desk definition and a role.

Configuring this tab involves setting three types of options

- Setting the Editing Template

Note: This preference can be overridden by the editing template selected in **User Preferences** (page 60).

- Setting Enable/Disable Options
- Setting Field Permissions

Setting the Editing Template

An **editing template** serves three purposes:

1. The editing template defines the layout of the dialog used to edit a ticket or KB article.
2. An editing template may *mask* selected fields, even though the fields are defined by the desk definition. *Using an editing template to mask a field overrides whatever field permission is set for that field.*
3. The editing templates also sets default **field permissions** (page 120) for editing a ticket or KB article. Whether assigned by role or by user, you can override the default field permissions set by the editing template to suit your business requirements.

An editing template is applied to a combination of desk definition and user role (or machine role) using **Role Preferences** (page 57) or the Desk Definition > Access > **Roles** (page 43) tab. An editing template can also be applied to a combination of desk definition and user using **User Preferences** (page 60).

User Preferences has precedence over Role Preferences. The default editing template for all roles and

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all users working with a service desk is specified in the Service Desk > Desk Definition > New or Edit > **General Info** (page 37) tab.

Setting Enable/Disable Options

You can can override the following Desk Definition > **General Info** (page 37) settings for any combination of role and desk definition.

- **Enable Session Timers** - If checked and **Auto Save Clock** is not checked, a Timer button displays in the **ticket editor** (page 23). See **Time Tracking and Service Desk** (page 14).
- **Show Task Information** - If checked, the **Task** tab displays in the ticket editor. See **Task Information** (page 17).

Setting Field Permissions

Field permissions are set by role. For VSA users using roles linked to the `Service Desk Technicians` role type, **field permissions** determine what fields a user can view or edit within the *ticket editor* or *KB article editor*. Typical field permissions include: `Editable`, `View Only`, `Hidden`, or `Required`. Default field permissions are set by **editing template** (page 119).

Note: VSA users using a role linked to the `Service Desk Administrators` role type can see and work with any field in any ticket editor or KB article editor. Master role users also always have complete field permission access, regardless of roletype assignment.

When an editing template is selected using this tab, the fields defined for this desk definition display in the dialog, showing the default permission set by the editing template. You may override the default for this combination of role and desk definition.

Standard Fields and Custom Fields

Standard Fields (page 30) refer to built-in fields provided by a service desk. They display as columns in the ticket table and in **field permission** (page 59) dialogs. A standard field is not necessarily available for all combinations of desk definition and user role. Nor does the same standard field necessarily display in both the ticket table and in field permission dialogs. **Custom fields** (page 40)—if defined for a service desk—also display as columns in the ticket table and in field permission dialogs.

User Preferences

Service Desk > Configure > User Preferences

The **User Preferences** page defines user-specific preferences that override **Role Preferences** (page 57). Each user has access to their own **User Preferences** page. **User Preferences** include:

- Email send delay
- Color coding of tickets in the tickets selector table.
- The user's preferred ticket editing template, one for each service desk.

Preferences are set using two tabs on this page:

- General tab
- Service Desks tab

General tab

Click **Edit** to edit General tab information.

Misc. Preferences

- **Email Send Delay (Mins)** - Pending email notification of selected tickets can be stopped using **Stop Notification** in **Tickets** (page 19). This option is used in conjunction with **Email Send Delay** in **Role Preferences** (page 57) and **User Preferences** (page 60). For example, if **Email Send Delay** is set to 5 minutes for the role you are using, then you have 5 minutes to cancel any emails that are pending for a ticket using **Stop Notification**. Applies to ticket rows displaying a 📧 icon in the icon column of the ticket table. **Stop Notification** only stops currently pending email.
- **Enable Incident Notes Panes** - If checked, an extra pane with two tabs displays below the **tickets table** (page 19) showing the selected ticket's **Description** and **Notes**.

Color Preferences

Set the color codes for ticket rows displayed in tickets tables, based on a **Date Range benchmark**. Available benchmarks include:

- **Last Date Modified** - The date the ticket was last modified.
- **Due Date** - The due date of the *current stage* of a ticket. The due date for the current stage of a ticket can only be used if a goal procedure is linked to that stage using the Desk Definition > Processing > Stage > **Procedures** (page 42) tab.
- **Creation Date** - The creation date of the ticket.
- **Promised Date** - The promise date of the ticket.

Ticket Age

For the selected date range benchmark you can select three colors:

- **Older than** - Enter the number of days *before* the selected date range benchmark to color code tickets. Use the color picker to select a color. For example, you might want to color code the oldest tickets as *red*.
- **Between** - Use the color picker to select a color. For example, you might want to color intermediate tickets as *yellow*.
- **Newer than** - Enter the number of days *after* the selected date range benchmark to color code tickets. Use the color picker to select a color. For example, you might want to color recent tickets as *green*.

Service Desks tab

Use this tab to select your "favorite" ticket editing template. You can specify a favorite editing template for each desk definition. This selection overrides the editing template preference set using the Service Desk > **Role Preferences - Service Desks tab** (page 59).

Incoming Email and Alarm Settings

Service Desk > Configure > Incoming Email and Alarm Settings

The **Incoming Email and Alarm Settings** page specifies how to process ticket requests in **Service Desk**. **Ticket requests** are created from either inbound emails or system events, such as alarm conditions. **Incoming Email and Alarm Settings** (page 61) and linked service desk procedures determine how ticket requests are processed into tickets, what service desks are used to create the tickets, and whether ticket requests are canceled.

There are two tabs on this page:

- **General** (page 62) - Specifies general settings for email readers and alarm settings.
- **Readers** (page 62) - Specifies one or more readers to periodically poll email accounts. Email messages are downloaded and used to create ticket requests.

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Actions

The following action buttons apply to all email readers defined in the **Readers** tab.

- **Edit** - Edits general settings for all email readers and alarm settings.
- **Connect Now** - Polls all emails readers immediately.
- **Enable** - Enables polling by all email readers. **Also enables alarm integration if Service Desk is activated (page 56).**
- **Disable** - Disables polling of all email readers **and prevents alarm integration.**

Note: If one or more email readers are failing to connect, click **Disable**, then click **Enable** to re-initialize polling.

Disabling the Ticketing Email Reader

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

General tab

Service Desk > Configure > Incoming Email and Alarm Settings > General tab

The following settings *apply to all email readers* defined in the **Readers** tab.

- **Poll Interval** - Specify how frequently all email readers connect to email accounts. The default connection frequency is 2 minutes.

Ignore emails with these subjects. - Enter text to ignore inbound emails containing this text *in the subject line*. Matching is case insensitive. *Quotes and wildcard characters such as * and ? are interpreted literally as part of the string content.* Create multiple filters using multiple lines. Multiple filters act as an OR statement. Surround whole words with spaces on both sides of each word. Example:

```
Undeliverable  
Do not reply
```

This same ignore list can be maintained in the **Ticketing > Email Reader**

(<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?434.htm>) page and the **Service Desk > Incoming Email and Alarm Settings > General tab (page 62)**. This list can also be maintained manually by editing the `<Kaseya_Installation_Directory>\Kaseya\KServer\ignoreSubject.txt` file.

The following settings apply to *alarm requests only and are unrelated to email readers*. See **Activation (page 56)**.

- **Alarm Mapping Procedure** - The **Ticket Request Mapping** procedure to run when a ticket is created from a system event, such as an alarm condition. A **Ticket Request Mapping (page 73)** procedure sets the attributes of a ticket request, just before the ticket is created, including the desk definition used to create the ticket.
- **Alarm De-Dup Procedure** - The **Ticket Request De-Dup** procedure to run when a ticket is created from a system event, such as an alarm condition. A **Ticket Request De-Dup (page 73)** procedure compares a ticket request with existing tickets to determine if the ticket request is a duplicate. If a ticket request is a duplicate of existing tickets, the ticket request is canceled.
- **Alarm Default Service Desk** - The desk definition to use to create tickets from alarms. Can be overridden by the **Alarm Mapping Procedure**.

Readers tab

Service Desk > Configure > Incoming Email and Alarm Settings > Readers tab

Inbound Email Configuration

You must perform all five steps below to enable inbound emails to create new tickets in **Service Desk**.

1. Add/edit an email reader as described below.
2. Ensure POP or IMAP, as specified in the email reader, is enabled in the email server being polled.
3. Specify the desk definition used to create the ticket, in any *one of the following three ways*:
 - a. Optionally set the **Default** desk definition in Service Desk > **Desk Definition** (page 35).
 - b. Optionally associate an email reader with a service desk using the Desk Definition > Service Desk > Desk Definition > New or Edit > Standard Field Defaults tab. Has precedence over the **Default** desk definition.
 - c. Optionally specify a service desk by associating an email reader with a unique **Ticket Request De-Dup** (page 73) or **Ticket Request Mapping** (page 73) procedure. Has precedence over the **Default** desk definition and the Desk Definition > **Email** setting.
4. Enable **Incoming Email and Alarm Settings** using the Service Desk > Common Configuration > Incoming Email and Alarm Settings > General tab.
5. Ensure **Ignore emails with these subjects** in the Incoming Email and Alarm Settings > **General tab** (page 62) is not filtering the email you are attempting to convert into tickets.

Note: See **Activation** (page 56) to create tickets based on system events, such as alarms.

Note: If a service procedure linked to your service desk sends emails, ensure that *outbound* emails are enabled using System > **Outbound Email** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?4765.htm>).

Adding/Editing an Email Reader

Click **New** to display the **Add Email Account** window, or click an existing email reader, then click **Edit** to display the **Change Email Account** window. Enter the following attributes:

- **ID** - The name of the email reader.
- **Host Name** - The host name of a POP3 or IMAP email server. For example, `pop.youremailserver.com` for a POP3 email server or `imap.youremailserver.com` for an IMAP email server. The email server may require a host name in the **Host Name** field instead of an IP address if **Use SSL** is also checked.
- **Port Number** - The port number used by the email service. This is normally 110 or 995.
- **Logon ID** - The email account name. *Do not include the @ suffix*. For example if the entire email address is `acme@yourmail.com`, enter `acme` in this field.
- **Password** - The email account password.
- **Reply Email Address** - Specifies the From address for outbound emails. The From address of an outbound email is specified using the following order of precedence:
 1. If there is a From address in the **sendEmail()** step of a procedure, then that address is used.
 2. Else the **sendEmail()** step uses the From address provided by a linked Service Desk > **Message Template**, if the link exists and a From address is specified.
 3. Else the **sendEmail()** step uses the **Reply Email Address** of the Service Desk > **Incoming Email and Alarm Settings** > email reader linked to the service desk. This link between the email

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reader and the service desk is set using the Service Desk > Desk Definition > Properties > General > **Standard Field Defaults** (page 38) > Email field.

4. Else the **Default Sender Email** address set in System > **Outbound Email** is used.

- **Disable Reader** - If checked, email is no longer retrieved from the email server.
- **Use SSL** - If checked, communication with the email server is encrypted using SSL. Your email server must support SSL to use this feature. Some systems require a SSL connection, and the corresponding port number is 995. The email server may require a host name in the **Host Name** field instead of an IP address if **Use SSL** is also checked.
- **Process HTML content in reply emails** - Checked by default. If blank, ignores HTML formatting in reply email and only examines the plain text reply message. Reply messages may be poorly formatted, confusing the processing of inbound email reply messages. Uncheck this checkbox if reply emails generate errors while attempting to update the original ticket.
- **Receipt Dup** - A **Ticket Request De-Dup** (page 73) procedure compares a ticket request with existing tickets to determine if the ticket request is a duplicate. If a ticket request is a duplicate of existing tickets, the ticket request is canceled.
- **Receipt Map** - A **Ticket Request Mapping** (page 73) procedure sets the attributes of a ticket request, just before the ticket is created, including the desk definition used to create the ticket. **Receipt Property Variables** (page 54) lists the property variables that are available to test for in a **Ticket Request Mapping** procedure.
- **Transport** - POP3 or IMAP.

Log

The log lists email reader tasks successfully completed and any errors that may have occurred.

Ticket Associations

A ticket request from an inbound email can be associated with an organization, machine or contact (staff member) in one of three ways, using the following order of precedence:

1. The ticket contains tilda (~) tagged content.
2. A ticket request mapping procedure tests the content of the ticket to determine the associations.
3. The "from" address of the inbound email matches the email of a staff record in the VSA. On the basis of this match, the staff member and the staff member's organization is associated with the ticket.

Contents of Email

A reader can receive plain or HTML formatted email, with or without attachments, and add the contents to the ticketing system. **RTF formatted emails are not supported.** The following tags can be included in *either the subject or the body* of the email. Tags are case-insensitive.

Existing Tickets Only

- `~ticaid='xxx'` - Appends the body of the email to an existing ticket. Optional. When a reply email is received, KSD attempts to use the ticket ID included in the previously sent outbound email to identify the existing ticket to append to.

New and Existing Tickets

- `~hide` - Makes the note a hidden note. The `~hide` tag itself is removed.

New Tickets Only

- `~username='xxx'` - Automatically inserts the value given as `xxx` into the **Submitter Name** field.

Note: If `~username='xxx'` is *not* included in the either the subject or the body of the email, then the email sender's `From` address is used to populate the **Submitter Name** field.

- `~useremail='xxx'` - Automatically inserts the value given as `xxx` into the **Submitter Email** field.
- `~assignee='xxx'` - Assigns the ticket created to a specific user. The user must exist.
- `~machineid='xxx.xxx'` - Assigns the ticket created to a machine ID. The machine ID must exist.
- `~machinegroup='xxx.xxx'` - Assigns the ticket created to a machine ID. The machine ID must exist.
- `~organization='xxx'` - Assigns the ticket created to an organization by orgID. The orgID must exist.

Note: The following fields are defined by desk definition.

- `~category='xxx'` - Assigns the ticket created to a specific category. The category must exist.
- `~priority='xxx'` - Assigns the ticket created to a specific priority. The priority must exist.
- `~status='xxx'` - Assigns the ticket created to a specific status. The status must exist.
- `~severity='xxx'` - Assigns the ticket created to a specific severity. The severity must exist.
- `~solutiontype='xxx'` - Assigns the ticket created to a specific resolution. The resolution must exist.
- `~customfield='xxx'` - Assigns the ticket created to the specified value of a custom field ID. The custom field ID must exist.

Procedure Variables

Service Desk > Configure > Procedure Variables

The **Procedure Variables** page defines variables used in service desk procedures. The default value set for a variable in **Procedure Variables** can be superseded by the default value for a **policy variable** (page 65).

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

Note: **Service Desk** installs pre-defined procedure variables. These pre-defined procedure variables are used by one or more pre-configured desk definitions and procedures installed using the **Desk Templates** (page 44) page. You can change their contents and your changes will be preserved. But if you delete these pre-defined procedure variables they will be re-created during the next maintenance cycle of the VSA.

Note: See **Working with Variables** (page 71) for an overview of variables in service desk procedures.

Click **New** to display the **Add Variable** window, or click a row in the *middle* panel, then click **Edit** to display the **Change Variable** window. Enter the following attributes:

- **Name** - The variable name. Can't be changed once you save it.
- **Description** - A brief description of the variable.
- **Set** - The set determines what kinds of desk definition procedures can use the variable. Use any set type of variable in **Policies** (page 65). You can define two variables with the same name, providing they are assigned different sets. Set options include:
 - Stage Entry or Exit

Common Configuration

- Ticket Change
 - Ticket Request De-Dup
 - Ticket Request Mapping
 - Ticket Goals
 - Ticket Escalations
 - All - Applies to all types of procedures.
- **Value** - The default value of the variable.

Policies

Service Desk > Configure > Policies

The **Policies** page regulates how a service desk can be used, including when it may be contacted, the method of contact used, the resources available and other requirements. Policies are assigned to a ticket as each ticket is created, by organization, organization type or machine group. See **Automated Processing Using Policies** (page 7).

Policy Configuration

1. Define the hours and days of the year a service desk is open to respond to service requests using **Coverage Schedules** (page 67). This includes hours of coverage to *standard* holidays.
2. Define hours of coverage for specific holidays using **Holidays** (page 68).
3. Define policies regulating how a service desk can be used, using **Policies**.
4. Link a policy to a service desk using using Service Desk > Desk Definition > Processing > **Associated Policies** (page 42).
5. Define variables you associate with service desk policies, using **Procedure Variables** (page 65).
6. Assign procedure variables to policies using the **Variables** tab in **Policies**.
7. Use policy variables in **procedures** (page 68) to determine how tickets are processed. An example is automatically setting property values in a ticket based on the value of a policy variable.

General tab

Click **New** to display the **Add Policy** window, or click a row in the *middle* panel, then click **Edit** to display the **Change Policy** window. Enter the following attributes:

- **ID** - The name of the policy.
- **Description** - A brief description of this ID.
- **Policy Hours** - Assign a **Coverage Schedules** record to this policy.
- The following settings are for reference purposes only.
 - **Contact by Email** - If checked, the service desk can be contacted by email.
 - **Contact by Phone** - If checked, the service desk can be contacted by phone.
 - **Contact by IM** - If checked, the service desk can be contacted by instant messaging.
 - **Access to Knowledge Base** - If checked, service desk users have access to a knowledge base.
- **Time Measured Against Coverage** - If checked, **goals and escalations** (page 68) include **Coverage Schedules** when calculating escalations. For example, if a new ticket is created just before the service desk shuts down for the night, and escalation is scheduled for two hours, then escalation won't occur until two hours after the service desk re-opens the next morning. If unchecked, calendar time alone is used.

Variables tab

Variables can be assigned to policies. Once policies are assigned to tickets, those tickets can be

processed by procedures differently, based on the values of their policy variables. Procedures can both read and override the values set by a policy variables.

Select a variable and assign a value. Before you can assign a variable to a policy, the variable must be previously created using Service Desk > **Procedure Variables** (page 65). When a procedure is processed, the default value for a policy variable supersedes the default value set for a variable using **Procedure Variables**.

Click **New** to display the **Add Variable** window, or click a row in the **Variables** tab, then click **Edit** to display the **Change Variable** window. Enter the following attributes:

- **ID** - Displays the policy name selected in the middle pane.
- **Variable** - Select a variable previously defined using Service Desk > **Policies**.
- **Value** - Enter an alphanumeric value.

Coverage Schedules

Service Desk > Configure > Coverage Schedules

The **Coverage Schedules** page specifies the hours and days of the week a desk definition is open to respond to service requests. A **Coverage Schedules** record is assigned to a **Policies** (page 65) record.

Testing for Coverage

An **Is Within Coverage** (page 81) service procedure command can test whether a ticket or KB article is within coverage. You can use this to determine the flow of automation from that point forward in the service procedure.

Time Measured Against Coverage

If the **Time Measured Against Coverage** checkbox in **Policies** (page 65) is checked, **goals** (page 74) and **escalations** (page 74) include **Coverage Schedules** when calculating escalations in service procedures. For example, if a new ticket is created just before the service desk shuts down for the night, and escalation is scheduled for two hours, then escalation will not occur until two hours after the service desk re-opens the next morning. If unchecked, calendar time alone is used.

General tab

Click **New** to display the **Add Hours Covered** window, or click a row in the *middle* panel, then click **Edit** to display the **Change Hours Covered** window. Enter the following attributes:

- **Name** - The name of the coverage schedule. Can't be changed once you save it.
- **Description** - A brief description of this ID.

Standard Hours tab

The **Standard Hours** tab defines different hours of coverage for different days of the week or year.

Click **New** to display the **Add Hours Covered Detail** window, or click a row in the **Standard Hours** tab, then click **Edit** to display the **Change Hours Covered Detailed** window. Enter the following attributes:

- **Name** - The name of the hours covered detail record.
- **Days Covered** - Enter the days of coverage for the week or year. Options include individual days in the week, Monday through Friday, weekends, or specific holidays. The holidays you can select in this drop-down list are defined using Service > **Holidays** (page 68). *Holidays older than the current date are not displayed in the drop-down list.*
- **Hours Covered** - Select one of the following:
 - **No Coverage**
 - **24 Hour Covered**
 - **Use these Hours** - If this option is selected, the following fields must be entered:

Procedures Definition

- ✓ **Begin Hour** - Enter the hour of the **Days Covered** that service coverage begins. Use 24 hour notation. For example, enter 8 to mean eight o'clock in the morning.
- ✓ **End Hour** - Enter the hour of the **Days Covered** that service coverage ends. Use 24 hour notation. For example, enter 17 to mean five o'clock in the afternoon.
- ✓ **Time Zone** - The time zone used to define when a service desk is available to receive calls from customers.

Note: All records are logged using the time zone of the Kaseya Server. The selected time zone only affects how time is entered and displayed in the user interface.

Default Holidays

You don't have to define hours of coverage for each holiday separately. Instead define hours of coverage for a record called `Default Holidays` in the **Days Covered** drop-down list. *This adds all holidays in the Holidays table to that coverage schedule.* If you don't define hours of coverage for a specific holiday by exception, then each holiday in the `Holidays` table uses the hours of coverage defined for `Default Holidays`.

Holidays

[Service Desk](#) > [Configure](#) > [Holidays](#)

The **Holidays** page is used to define holidays by specific date. Once defined, they are listed in the **Days Covered** drop-down list in the **Standard Hours** tab of the **Coverage Schedules** (page 67) page. You can change the date of each holiday at any time—for example, at the beginning of each year—without having to reapply them to your coverage schedules.

Default Holidays

You don't have to define hours of coverage for each holiday separately. Instead define hours of coverage for a record called `Default Holidays` in the **Days Covered** drop-down list. *This adds all holidays in the Holidays table to that coverage schedule.* If you don't define hours of coverage for a specific holiday by exception, then each holiday in the `Holidays` table uses the hours of coverage defined for `Default Holidays`.

Actions

- **New** - Click **New** to display the **Add Holiday** window.
 - **Description** - The name of the holiday. This middle pane identifier can not be changed once you save it.
 - **Date** - Enter the calendar date for the holiday.
- **Edit** - Changes the date of an existing holiday.
- **Delete** - Deletes an existing holiday.

Procedures Definition

[Service Desk](#) > [Service Desk Procedures](#)

Service Desk procedures automate the processing of tickets and ticket requests. All service desk procedures are created and structured in a similar fashion.

Types of Procedures

- **Stage Entry or Exit** (page 72) - Runs when a ticket enters or exits a stage.
- **Ticket Change** (page 73) - Runs each time a ticket is changed.
- **Goal** (page 74) - Runs after a specified time period, usually to record whether or not a goal was met.
- **Escalation** (page 74) - Runs after a specified time period, usually to escalate a ticket to another level of service.
- **Sub-Procedures** (page 75) - Runs when executed by another service desk procedure.

The following procedures apply to *ticket requests* processed using **Incoming Email and Alarm Settings** (page 61).

- **Ticket Request De-Dup** (page 73) - Compares a *ticket request* with existing tickets to determine if the ticket request is a duplicate. If a ticket request is a duplicate of existing tickets, the ticket request is canceled.
- **Ticket Request Mapping** (page 73) - Sets the attributes of a *ticket request*, just before the ticket is created, including the desk definition used to create the ticket.

Additional Topics


- **Service Procedure Folder Trees** (page 69)
- **Procedure Editor** (page 70)
- **Working with Variables** (page 71)
- **Service Desk IF-ELSE and STEP Statements** (page 77)
- **Service Desk Priority Calculations** (page 75)

Service Procedure Folder Trees

Service Desk > Procedure Definition > (Any Type of Procedure)

All service procedures are organized under a single **Shared** cabinet. Use the following options to manage objects in these folder trees.

Always Available

- **(Apply Filter)** - Enter text in the filter edit box, then click the funnel icon  to apply filtering to the folder trees. Filtering is case-insensitive. Match occurs if filter text is found anywhere in the folder trees.

When the Shared Cabinet or a Folder is Selected

- **Add Folder** - Creates a new folder underneath the selected cabinet or folder.
- **Import Folder/Procedure** - Imports a folder or procedure as children to the selected folder in the folder tree.

Note: Legacy scripts can be imported into Kaseya 2.

- **Export Folder** - Exports the selected folder and all its procedures as an XML file. The XML file can be re-imported.

Note: Desk definitions, message templates and tickets can be imported and exported using the **System > Import Center** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?4796.htm>). A desk definition can be exported as a template or as desk. Exporting a desk definition can include all the procedures that support it. Exporting a ticket includes the desk that supports it.

Procedures Definition

- **Expand All** - Expands the entire folder tree.
- **Collapses All** - Collapses the entire folder tree.

Additional Buttons Displayed When a Folder is Selected

- **Share Folder** - Shares a folder with user roles and individual users. Applies to shared cabinet folders only.
- **Delete Folder** - Deletes a selected folder.
- **Rename Folder** - Renames a selected folder.
- **New Procedure** - Opens the **Procedure Editor** (page 70) to create a new procedure in the selected folder of the folder tree.
- **Folder Properties** - Displays the name, description, and owner of a folder, and your access rights to the folder.

Note: See guidelines for share rights to objects within folder trees in the **Folder Rights** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?4673.htm>) topic.

When a Procedure is Selected

- **Edit Procedure** - Opens the **Procedure Editor** (page 70) to edit the selected procedure.
- **Delete Procedure** - Deletes the selected procedure.
- **Export Procedure** - Exports the selected procedure.
- **Rename Procedure** - Renames the selected procedure.

Creating / Editing Service Procedures

To create a *new* service procedure, select a folder in the middle pane, then click the **New Procedure** button to open the **Procedure Editor** (page 70).

To *edit* an existing service procedure, select the procedure, then click the **Edit Procedure** button to open the **Procedure Editor** (page 70). You can also double-click a procedure to edit it.

Viewing Procedure Details

When a service procedure is selected in the middle pane, the following tabs display in the right-hand pane:

- **View Procedure** - Provides a display-only view of the procedure.
- **Used by** - Displays a list of other procedures that execute this procedure. Procedures that are used by other procedures cannot be deleted.

Procedure Editor

In any service desk procedure *folder tree* (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?4673.htm>), click **New Procedure** or **Edit Procedure** to display the **procedure editor**.

- The left hand pane displays the outline of the entire procedure.
- The right hand pane displays the parameters for each statement.

Note: See **IF-ELSE-STEP Service Desk Commands** (page 77) for a detailed explanation of each statement's parameters.

Title

- This the first step in the procedure, where you set the name and description of the procedure.





Action Buttons

- **New Step** - Creates a step below the currently selected statement.
- **New IF** - Creates a pair of IF-Else statements below the currently selected statement.
- **Toggle Else** - Adds or removes the corresponding Else statement for a selected IF statement. Only displays if an IF statement is selected.
- **Copy** - Copies a single Step or IF statement to the clipboard. Copying an IF statement includes all child statements, so you quickly copy and paste entire IF branches within the same procedure.
- **Paste** - Pastes a Step or IF statement just below a selected statement.
- **Delete** - Deletes the currently selected Step, IF or Else statement.

Closing the Editor

- **Save and Close** - Saves and closes the procedure.
- **Save** - Saves the procedure.
- **Save As** - Saves the procedure to a different name.
- **Cancel** - Cancels changes made to the procedure.

Drag and Drop

-  - Drag any statement and drop it above another statement.
-  - Drag any statement and drop it below another statement.
-  - Drag any statement and drop it between another statement.
-  - Drag any statement to a procedure Title, IF or Else statement and add it as a child statement.

Guidelines

- Click any Step, IF or Else statement in a procedure to see its properties in the right-hand pane. You can edit these properties immediately.
- You can nest steps within multiple IF or Else statements.
- You can toggle the removal of an Else statement without removing its corresponding IF statement.
- You can set a Step to allow a procedure to continue running even if that particular Step fails.
- You can nest procedures within procedures using the `Execute a Common Sub-Procedure` command.

Working with Variables

The following guidelines apply to any service desk procedure.

- **Global Procedure Variables** - Global procedure variables are defined using Service Desk > **Procedure Variables** (page 65).
 - The same global variable can be applied to any procedure run by any service desk.
 - The **Check a Variable** (page 81) command tests the value of a variable in a procedure.
 - The value of a global variable can be changed within a procedure using the **Get a Variable** (page 87) command, but that value persists only for the duration of the procedure.
 - Within a procedure, a global variable is referenced *in text* by bracketing its name with the [= and =]. Example: [=varname=].
 - Global variables are defined by **name** and **set type**. For example, a global variable could be called `varname` and use the set type `All`. The set type `All` means the global variable can be used in any procedure. If a variable is defined using a set type for a specific procedure, it

Procedures Definition

can only be used in procedures matching that set type. For example, a variable defined using the `Goal` set type can only be used in **Ticket Goals** procedures.

- A global variable of any set type can be associated with a policy. **Policies** (page 65) ignore the set type assigned to the global variable.
- **Procedure-Specific Variables** - Within a procedure you can create a *procedure-specific* variable using the **Get a Variable** (page 87) command and assign it a value.
 - Unlike global variables, the scope of a procedure variable applies only to the procedure it was created in.
 - Like global variables a procedure variable is referenced *in text* by bracketing its name with the [= and =]. Example: [=varname=].
- **Property Variables** - Property variables reference the values of fields within the VSA.
 - Property variables are distinguished by bracketing their names *in text* with [\$ and \$]. Example: [\$machine\$].
 - Types of property variables include [\$TicketId\$] or [\$Organization\$] or [\$Status\$]. See **Standard and Custom Property Variables** (page 52) for a list of property variables.
 - Like global variables and procedure variables, the values of property variables can be tested with IF statements.
 - Setup for the [\$Manager\$] property variable:
 - ✓ Create an Organization.
 - ✓ Create a Department within that Organization.
 - ✓ Create a first Staff member assigned to that Department.
 - ✓ Create a second Staff member assigned to that Department.
 - ✓ There is a field named Supervisor in the Staff record. Assign the *second* Staff member as the *Supervisor* of the first Staff member.
 - ✓ Create a ticket and assign the *first* Staff member to the ticket, the one who has a Supervisor. The Supervisor name does not display in the ticket.
 - ✓ Save the ticket.
 - ✓ Any associated procedure such as stage entry or ticket change can now test for the ticket's [\$Manager\$] property variable being equal to the name of the *first* staff member.
 - ✓ Custom fields property variables are supported.
- **Case Sensitivity** - All three types of variable names are case sensitive.
- **Where Used** - Once variables are created you can include them, in their bracketed format, *in any text entry field* displayed by an IF-ELSE dialog box.
- **Message Templates - Property variables** (page 52), global variables and **procedure variables** (page 65) can be resolved in message templates.
 - Any user name included in the **To** field of a message template is automatically converted into that user's corresponding email address. For example, if the user `jsmith` has a corresponding email address of `jsmith@acme.com`, then the same message template—with `jsmith` in the **To** field—can be used by a **sendMessage()** step to send a message to `jsmith` and also used by a **sendEmail()** step to send an email to `jsmith@acme.com`. Email addresses for each user are maintained using System > **Users** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?4576.htm>).
- **Note Templates** - Property variables, global variables and procedure variables can be resolved in note templates.

Stage Entry or Exit

Procedures Definition > Stage Entry or Exit

A **Stage Entry or Exit** procedure runs when a ticket transitions to a specified stage. Procedures are linked to stages using the Service Desk > Desk Definition > Processing > Stage > New / Edit > **Procedures** (page 42) tab.

Sequencing of Procedures

If you change a stage procedure manually, the stage *exit* procedure runs first, then the stage *entry* procedure for the new stage runs second, then the *ticket change* procedure runs third.

If you set a ticket to a stage *during a procedure*, the procedure waits while the stage exit procedure for the *current* stage runs, then waits while the stage entry procedure for the *new* stage runs, then resumes running the rest of the procedure from that point.

Ticket Change

Procedures Definition > Ticket Change

A **Ticket Change** runs each time a ticket is changed. Typically **Ticket Change** procedures notify the owner, assignee or submitter that a ticket has been updated. **Ticket Change** procedures are linked to the entire desk definition using the Service Desk > Desk Definition > New / Edit > **Procedures** (page 38) tab.

Sequencing of Procedures

If you change a stage procedure manually, the stage *exit* procedure runs first, then the stage *entry* procedure for the new stage runs second, then the *ticket change* procedure runs third.

If you set a ticket to a stage *during a procedure*, the procedure waits while the stage exit procedure for the *current* stage runs, then waits while the stage entry procedure for the *new* stage runs, then resumes running the rest of the procedure from that point.

Ticket Request De-Dup

Procedures Definition > Ticket Request De-Dup

A **Ticket Request De-Dup** procedure compares a *ticket request* with existing tickets to determine if the ticket request is a duplicate. If a ticket request is a duplicate of existing tickets, the ticket request is canceled.

Ticket requests are created from either inbound emails or system events, such as alarm conditions. **Incoming Email and Alarm Settings** (page 61) and linked service desk procedures determine how ticket requests are processed into tickets, what service desks are used to create the tickets, and whether ticket requests are canceled.

Note: See the **Tests for Duplicate Requests** (page 81) command for details on comparing a ticket request with existing tickets. This IF command is only available in a **Ticket Request De-Dup** procedure.

Note: See **Receipt Property Variables** (page 54) for a list of property variables that apply to ticket requests.

Ticket Request Mapping

Procedures Definition > Ticket Request Mapping

A **Ticket Request Mapping** procedure sets the attributes of a *ticket request*, just before the ticket is created, including the desk definition used to create the ticket.

Ticket requests are created from either inbound emails or system events, such as alarm conditions. **Incoming Email and Alarm Settings** (page 61) and linked service desk procedures determine how ticket requests are processed into tickets, what service desks are used to create the tickets, and whether ticket requests are canceled.

Note: See the **Test Property Value of the Receipt** (page 82) command for details on testing the property values of ticket requests, including the *source* system event of the ticket request. This IF command is only available in a Ticket Request Mapping procedure.

Note: See **Receipt Property Variables** (page 54) for a list of property variables that apply to ticket requests.

Goal

Procedures Definition > Goal

A **Goal** procedure runs after a specified time period, usually to record whether or not a goal was met.

Goal Procedures for Tickets

A goal procedure is linked to a *desk definition* using the Service Desk > Desk Definition > New / Edit > **Procedures** (page 38) tab.

- The ticket goal sets the due date for the entire ticket.
- The ticket editor displays the ticket due date.
- The ticket due date can be set using the **Set Ticket Goal Time** (page 89) command.
- Ticket goal times can be paused and resumed using the **Pause Ticket Goal** (page 88) and **Resume Ticket Goal** (page 88) commands.

Goal Procedures for Stages

Goal procedures are linked to *stages* using the Service Desk > Desk Definition > Processing > Stage > New / Edit **Procedures** (page 42) tab.

- A stage goal procedure starts the goal clock as soon as the ticket enters the stage. The triggering of a stage goal procedure is canceled as soon as the ticket transitions out of that stage.
- The goal time for a stage can be set using the **Set Goal Time** (page 89) command. This overrides the default goal time set in the stage record.
- Color coding by due date in **Role Preferences** (page 57) is determined by a goal procedure linked to a stage.
- Stage goal times can be paused and resumed using the **Pause Stage Goal** (page 88) and **Resume Stage Goal** (page 88) commands.
- Unlike **escalations** (page 74), goal "levels" do not exist. There is only one for each stage.

Escalation

Procedures Definition > Escalation

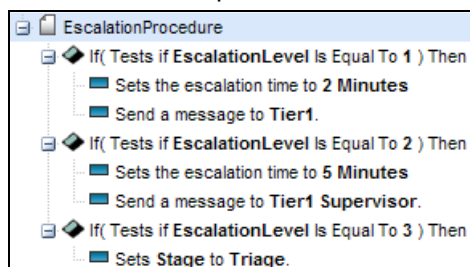
An **Escalation** procedure runs after a specified time period, usually to escalate a ticket to another level of service.

- Escalation procedures are linked to *stages* using the Service Desk > Desk Definition > Processing > Stage > New / Edit > **Procedures** (page 42) tab.
- A stage escalation starts the escalation clock as soon as the ticket enters the stage. The escalation procedure, including all levels of the escalation, is canceled when that stage of the ticket is exited.
- The escalation time for a stage can be set using the **Set Escalation Time** (page 89) command. This overrides the default escalation time set in the stage record.

Escalation Levels

An escalation procedure can be triggered to run multiple times, based on the escalation level of the ticket. Each time the ticket fails to exit the stage, the escalation level of the ticket increases by one. So a stage starts out with an escalation level value of zero. After the first escalation occurs, the escalation level is equal to one, and so on.

- When a stage is exited all escalation levels for the current stage of that ticket are canceled.
- Procedures can be configured to test the `EscalationLevel` property using the **Test a Property Value of the New Ticket** (page 82) command.
- Message Templates** (page 51) and **Note Templates** (page 50) can include the escalation level of a ticket in text using `[$EscalationLevel$]` notation. See **Standard and Custom Property Variables** (page 52).
- A ticket escalation procedure can reset the escalation level and time by using a **Set Escalation Time** (page 89) command. Each escalation procedure that runs sets up the next escalation event to occur. Example:



Sub-Procedures

Procedures Definition > Sub-Procedures

A **Sub-Procedures** procedure runs when executed by another service desk procedure. This enables you to maintain a single sub-procedure and execute it repeatedly.

- Sub-procedures are executed using the **Execute a Common Sub-Procedure** (page 86) command.
- Any type of procedure can execute a sub-procedure.
- You can nest the execution of procedures to 10 levels.

Note: See **Service Desk Priority Calculations** (page 75) for an example of a sub-procedure.

Service Desk Priority Calculations

The STD Calculate Priority sub-procedure—used by the ITIL-based **Incident** (page 46) service desk—calculates the priority for a ticket. The calculation considers ticket settings for *Severity* first, then *Urgency* to select:

- The value for the ticket's *Priority* field.
- The **escalation time** (page 89) for the stage of the ticket.
- The **goal time** (page 89) for the stage of the ticket.

Glossary

- **Severity** – Seriousness of the incident/service request. Possible values are:
- **Urgency** - Requiring or compelling speedy action or attention. The matter is urgent.
- **Priority** - The right of precedence over others. Something given specified attention. My first priority.

Severity and Urgency

The possible values for both *Severity* and *Urgency* are:

- High
- Medium
- Low

Priorities for Setting Escalation Times

The STD Calculate Priority sub-procedure references the following pre-defined **procedure variables** (page 65) to set the *escalation time* for the stage of a ticket.

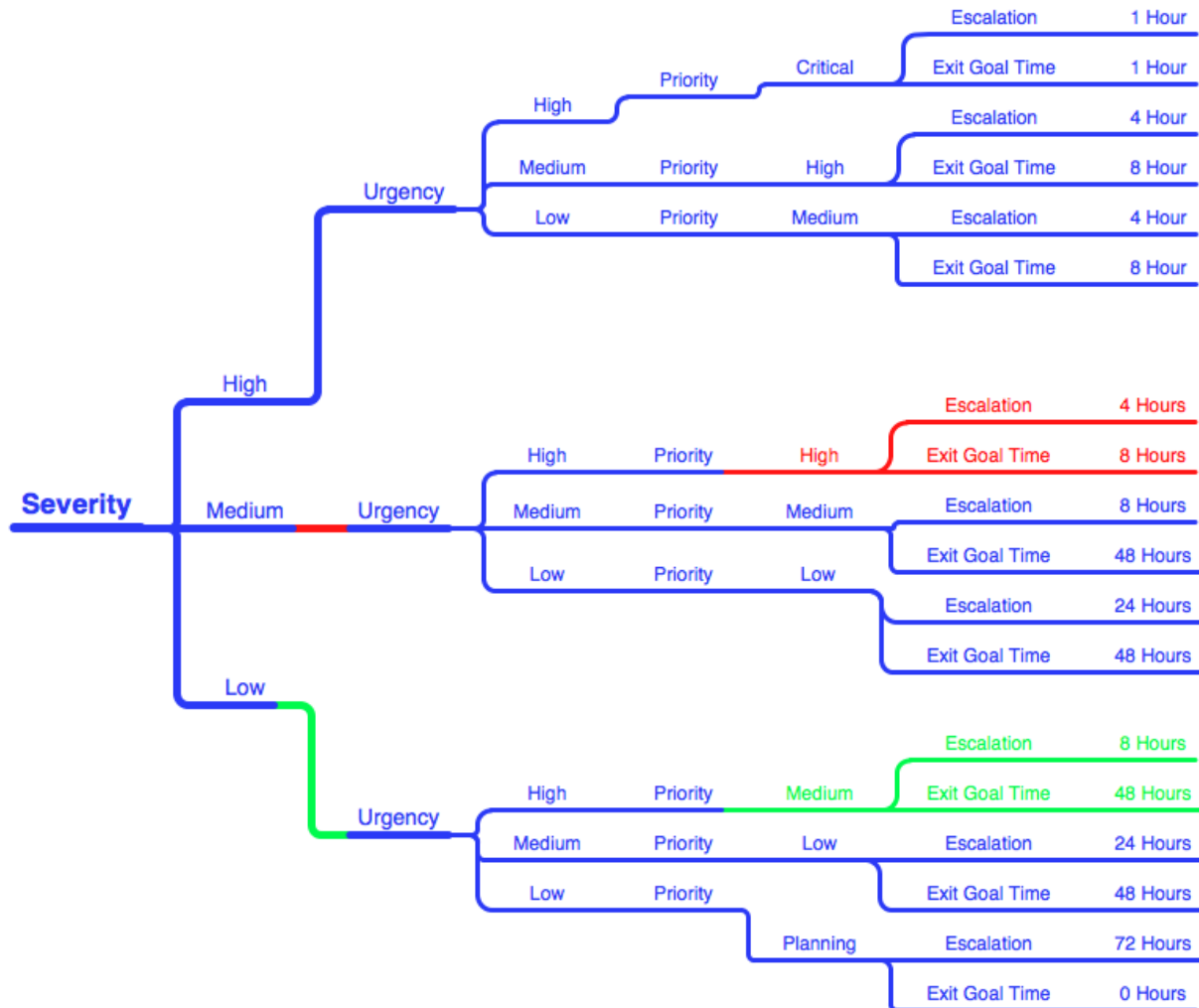
Escalation_Priority1	Critical	= 1 hour
Escalation_Priority2	High	= 4 hours
Escalation_Priority3	Medium	= 8 hours
Escalation_Priority4	Low	= 24 Hours
Escalation_Priority5	Planned	= 72 Hours

SLA Priorities for Setting Goal Times

The STD Calculate Priority sub-procedure references the following pre-defined procedure variables to set the *goal time* for the stage of a ticket.

SLA_Priority1	Critical	= 1 hour
SLA_Priority2	High	= 8 hours
SLA_Priority3	Medium	= 48 hours
SLA_Priority4	Low	= 48 Hours
SLA_Priority5	Planned	= 0 Hours

Priority Calculations in Service Desk for the ITIL Incident Desk



IF-ELSE-STEP Service Desk Commands

The following is a summary of **IF-ELSE** and **STEP** statements used in **Service Desk** procedures.

IF-ELSE Statements	
Check a Variable (page 81)	Evaluate a given variable.
Is Within Coverage (page 81)	Tests whether a ticket or KB article is currently within the coverage schedule.
Tests for Duplicate Requests (page 81)	Compares inbound email to determine if it is a duplicate of an existing ticket.
Test a Custom Field of the Ticket (page 82)	Compares a custom field value in a ticket to a specified value or variable.

Procedures Definition

Test a Property Value of the New Ticket (page 82)	Compares the value of a field in a ticket to a specified value or variable.
Test a Property Value of the Receipt (page 82)	Compares the value of a field in an inbound email to a specified value or variable.

STEP Statements	
Add a Note (page 85)	Adds a note to the ticket being processed by the procedure.
Assign Object Property (page 85)	Assigns a value to the property of a <i>new ticket</i> created using the Create Ticket (page 86) command.
Assign Ticket Custom Field (page 85)	Assigns a value to a custom field in a ticket.
Assign Ticket Property (page 86)	Assigns a value to the property of the <i>current</i> ticket.
Create Ticket (page 86)	Creates a new ticket in a specified service desk.
Delete a Ticket (page 86)	Deletes the ticket being processed by the procedure.
Execute a Common Sub-Procedure (page 86)	Starts another procedure.
Execute an External Script (page 86)	Executes a script written in C#.
executeShellCommand() (page 86)	Executes a shell command on the Kaseya Server
Execute SQL Non-Query (page 87)	Executes an SQL non-query command on the Kaseya Server SQL Server database.
Execute SQL Select Query (page 87)	Executes an SQL select query command on the Kaseya Server SQL Server database.
Fails the Current Ticket Transaction (page 87)	Changes made to a ticket are not saved to the database.
Get Agent Property (page 87)	Returns a selected property value from the last audit of the agent machine associated with the ticket.
Get a Variable (page 87)	Gets a entered value or a value from a file stored on the Kaseya Server.
Link to Another Ticket (page 87)	Associate another ticket with the ticket being processed.
Pause Stage Goal (page 88)	Pause counting elapsed time against the stage goal.
Pause Ticket Goal (page 88)	Pause counting elapsed time against the ticket goal.
Resume Stage Goal (page 88)	Resume counting elapsed time against the stage goal.
Resume Ticket Goal (page 88)	Resume counting elapsed time against the ticket goal.

scheduleProcedure() <i>(page 88)</i>	Runs a selected <i>agent procedure</i> for a specified machine.
sendEmail() <i>(page 88)</i>	Sends an email to one or more recipients.
sendMessage() <i>(page 88)</i>	Sends a message to the inbox of a user.
Send a Text Message <i>(page 89)</i>	Sends a text message to a mobile device. <i>Not yet implemented.</i>
Send a Voice Message <i>(page 89)</i>	Converts a text message to a voice message and sends it to a mobile device. <i>Not yet implemented.</i>
Send Message to Pool Users <i>(page 89)</i>	Sends a message to the inbox of each user included in a pool.
Set Escalation Time <i>(page 89)</i>	Sets the time a ticket is escalated.
Set Goal Time <i>(page 89)</i>	Sets the time a ticket or stage goal is scheduled to be completed.
Set Ticket Goal Time <i>(page 88)</i>	Set the due date for the entire ticket.
writeProcedureLogEntry() <i>(page 89)</i>	Writes an entry to System > Application Logging (http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?4739.htm).

Where Used

These **IF-ELSE** and **STEP** statements are used by the following types of **Service Desk** procedures.

IF-ELSE Statements	Stage Entry or Exit	Ticket Change	Ticket Request De-Dup	Ticket Request Mapping	Ticket Goals	Ticket Escalations	Sub-Procedures
Check a Variable <i>(page 81)</i>							
Is Within Coverage <i>(page 81)</i>							
Tests for Duplicate Requests <i>(page 81)</i>							
Test a Custom Field of the Ticket <i>(page 82)</i>							
Test a Property Value of the New Ticket <i>(page 82)</i>							
Test a Property Value of the Receipt <i>(page 82)</i>							

Procedures Definition

STEP Statements	Stage Entry or Exit	Ticket Change	Ticket Request De-Dup	Ticket Request Mapping	Ticket Goals	Ticket Escalations	Sub-Procedures
Add a Note (page 85)							
Assign Object Property (page 85)							
Assign Ticket Custom Field (page 85)							
Assign Ticket Property (page 86)							
Create Ticket (page 86)							
Delete a Ticket (page 86)							
Execute a Common Sub-Procedure (page 86)							
executeShellCommand() (page 86)							
Execute SQL Non-Query (page 87)							
Execute SQL Select Query (page 87)							
Fails the Current Ticket Transaction (page 87)							
Get Agent Property (page 87)							
Get a Variable (page 87)							
Link to Another Ticket (page 87)							
Pause Stage Goal (page 88)							
Pause Ticket Goal (page 88)							
Resume Stage Goal (page 88)							
Resume Ticket Goal (page 88)							
scheduleProcedure() (page 88)							
sendEmail() (page 88)							
sendMessage() (page 88)							
Send Message to Pool Users (page 89)							
Set Escalation Time (page 89)							
Set Goal Time (page 89)							
Set Ticket Goal Time (page 89)							
writeProcedureLogEntry() (page 89)							

IF-ELSE in Detail

Check a Variable

Enter the name of the variable in the format `#var_name#`. It can be a global variable or a procedure variable that was defined earlier in the current procedure or a parent procedure. If a global variable, then the global variable's **Set** value must be compatible with the procedure being run. See **Procedure Variables** (page 65) and **Working with Variables** (page 71) for more information about variables.

Enter a string comparison operator. The same string comparison options are available for all IF commands. See **String Comparisons** (page 84) and **Date/Time Comparisons** (page 84).

Then enter a second value to compare against the first value. Instead of a value you can also enter a property variable in the format `[$objectname$]` or a global variable or procedure variable in the format `[=var_name=]`. See **Standard and Custom Property Variables** (page 52) for a list of property variables.

If the test is true, **IF** steps are executed. If the test is false, **ELSE** steps are executed.

Is Within Coverage

This IF command is not available for **Ticket Request De-Dup** (page 73) and **Ticket Request Mapping** (page 73) procedures.

Tests whether a ticket or KB article is currently within the **coverage schedule** (page 67).

Tests for Duplicate Requests

This IF command is only available in a **Ticket Request De-Dup** (page 73) procedure.

Tests a *ticket request* to see if it is a duplicate of any existing ticket. Prevents multiple tickets from being created for the ticket request, within a specified time limit.

Ticket requests are created from either inbound emails or system events, such as alarm conditions. **Incoming Email and Alarm Settings** (page 61) and linked service desk procedures determine how ticket requests are processed into tickets, what service desks are used to create the tickets, and whether ticket requests are canceled.

Tests true if one or more of the following conditions are matched:

- **Match the submitter name**
- **Match the submitter email address**
- **Match the request subject**
- **Match the source type**
 - 0 – Counter
 - 1 – Service
 - 2 – Process
 - 3 – SNMP
 - 4 – Alert
 - 5 – System Check
 - 6 – KES
 - 7 – Log Parser
- **Match the first reference field** - Refers to the event ID and value ID of an event log alert.
- **Match the second reference field** - Refers to the alert log type, which is either a system check or an event log alert. Event log alerts are classified as "6 = custom" log type alerts.
 - 1 = web server check

Procedures Definition

- 2 = dns check
- 4 = port check
- 5 = ping
- 6 = custom
- **Match the machine**
- **Match the machine group**
- **Enter Recurrence Time (Integer) / The Unit of Time** - Limits matching to the most recent <N> number of periods, based on the ticket creation date.

Test a Custom Field of the Ticket

Enter the name of the custom field in the format `custom_field`, without bracket characters of any kind.

Enter a string comparison operator. The same string comparison options are available for all IF commands. See **String Comparisons** (page 84) and **Date/Time Comparisons** (page 84).

Then enter a second value to compare against the first value. Instead of a value you can also enter a property variable in the format `[$objectname$]` or a global variable or procedure variable in the format `[=var_name=]`. See **Standard and Custom Property Variables** (page 52) for a list of property variables. See **Procedure Variables** (page 65) and **Working with Variables** (page 71) for more information about variables.

If the test is true, **IF** steps are executed. If the test is false, **ELSE** steps are executed.

Test a Property Value of the New Ticket

Select a ticket property from the drop-down list.

Enter a string comparison operator. The same string comparison options are available for all IF commands. See **String Comparisons** (page 84) and **Date/Time Comparisons** (page 84).

Then enter a second value to compare against the first value. Instead of a value you can also enter a property variable in the format `[$objectname$]` or a global variable or procedure variable in the format `[=var_name=]`. See **Service Desk Property Variables** (page 52) for a list of property variables. See **Procedure Variables** (page 65) and **Working with Variables** (page 71) for more information about variables.

If the check is true, **IF** steps are executed. If the check is false, **ELSE** steps are executed.

Test Property Value of the Receipt

This IF command is only available in a **Ticket Request Mapping** (page 73) procedure.

Select a ticket property from the drop-down list, in the format `objectname`, without bracket characters of any kind.

Enter a string comparison operator. The same string comparison options are available for all IF commands. See **String Comparisons** (page 84) and **Date/Time Comparisons** (page 84).

Then enter a second value to compare against the first value. Instead of a value you can also enter a property variable in the format `[$objectname$]` or a global variable or procedure variable in the format `[=var_name=]`. See **Standard and Custom Property Variables** (page 52) for a list of property variables. See **Procedure Variables** (page 65) and **Working with Variables** (page 71) for more information about variables.

If the test is true, **IF** steps are executed. If the test is false, **ELSE** steps are executed.

SourceType, SourceTag and SourceValue Properties

The `SourceType`, `SourceTag` and `SourceValue` properties are populated when ticket creation is

triggered by a system event and **Service Desk** integration is **activated** (page 56). For example, various types of alarms conditions can trigger the creation of a ticket. The following table shows how the `SourceType` and three `SourceTag` fields are populated by a variety of alarm conditions. The `SourceValue` columns—not shown in this table—contain the specific values that correspond to these `SourceTag` fields.

SourceType	SourceTag1	SourceTag2	SourceTag3
Event Log	agentguid	alertid	EventLogTypeid
Counter	agentguid	monitorobjectid	
Agent Offline	agentguid	alertid	
Service	agentguid	monitorobjectid	
New Patch	agentguid	alertid	
Agent Credential Invalid	agentguid	alertid	
Win AU Change	agentguid	alertid	
RAM Change	agentguid	alertid	
Disk Drive Change	agentguid	alertid	
Agent Online	agentguid	alertid	
PCI Card Change	agentguid	alertid	
System Check	agentguid	alertid	

All Alerts

The following fields are set for all tickets generated from all alerts:

- `sourceType` = alert name (name of actual alert for `sourceValue2`)
- `sourceTag1` = "AgentGuid" (string label - never changes)
- `sourceValue1` = the actual `agentGuid` triggering the alert
- `sourceTag2` = "AlertRegistrationId" (string label - never changes)
- `sourceValue2` = the alert ID (primary key in `alertRegistration` table; identifies the actual alert)

Event Log Alert

Note: Only the Event Log, Missing Event Log, and Multiple Event Log alerts (`SourceType`) have more than two `SourceTag` fields.

The following fields are set for all tickets generated for the specified event log alert. 3, 4 and 5 `sourceTags` and `sourceValues` are generated for *Missing Event Log Alerts* and *Multiple Event Log Alerts*.

- `sourceTag3` = "LogType" (string label - never changes)
- `sourceValue3` = `logType` value (value in `eventLogType.EventLogTypeid`; ** see below)
- `sourceTag4` = "LogTypeLabel" (string label - never changes)
- `sourceValue4` = `logType` label (value in `eventLogType.logfileName` for `LogType` value; ** see below)
- `sourceTag5` = "EventSetName" (string label - never changes)
- `sourceValue5` = eventSet name
- `sourceTag6` = "EventId" (string label - never changes)
- `sourceValue6` = eventId

Procedures Definition

- sourceTag7 = "EventSource" (string label - never changes)
- sourceValue7 = eventSource
- sourceTag8 = "EventMessage" (string label - never changes)
- sourceValue8 = eventMessage

LogType Values from the eventLogType Table

EventLogTypeId logFileName

286518283	Directory Service
635771359	Internet Explorer
796450521	Application
1208407329	DNS Server
1380569194	System
1664713117	Security

String Comparisons

The string comparisons performed in IF commands are not case sensitive. The available tests are:

- `Exists` : true if the variable exists *and* the variable has a non-empty value
- `Does Not Exist` : true if the variable does *not* exist *or* the variable has an empty value
- `Is Equal To` : true if value of the variable equals the test value.
- `Is Not Equal To` : true if value of the variable does *not* equal the test value.
- `Is Greater Than` : true if value of the variable is greater than the test value.
- `Is Greater Than or Equal To` : true if value of the variable is greater than or equal to the test value.
- `Is Less Than` : true if value of the variable is less than the test value.
- `Is Less Than or Equal To` : true if value of the variable is less than or equal to the test value.
- `Contains` : true if the test value is a sub string of the variable (variable must be a string).
- `Does Not Contain` : true if the test value is *not* a sub string of the variable (variable must be a string).

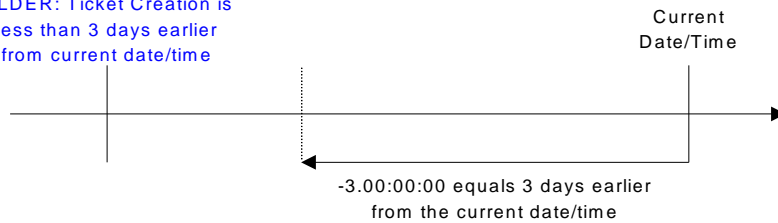
For the tests `Is Equal To`, `Is Not Equal To`, `Is Greater Than`, `Is Greater Than or Equal To`, `Is Less Than`, and `Is Less Than or Equal To` the variables compared may be a string, a number, a date in the format of `yyyy/mm/dd` or `yyyy/mm/dd hh:mm` or `yyyy/mm/dd hh:mm:ss`, or a version number containing dots or commas such as `1.2.3` or `4,5,6,7`. If a date format is specified, it may be offset using `+ dd:hh:mm:ss` or `- dd:hh:mm:ss`. Only `dd` days are required; `hh` hours, `mm` minutes, and `ss` seconds may be omitted and are assumed to be zero when absent.

Date/Time Comparisons

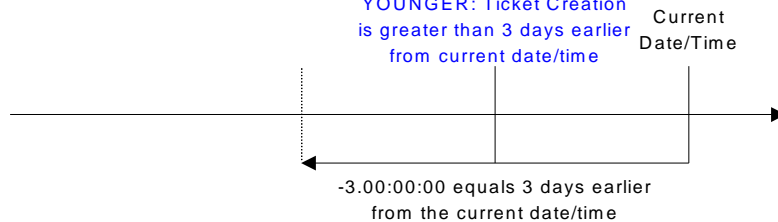
You can use an IF statement to test whether a time relative to the current time is true or not. Relative time is specified as `[-] [d.]hh:mm:ss` where `d` is the number of days, `hh` is the number of hours, `mm` is the number of minutes, and `ss` is the number of seconds. Specifying a `-` in front causes a time in the past to be calculated. Thus `-1:00:00` means one hour ago, `-3.12:45:08` means three days, 12 hours, 45 minutes, and 8 seconds ago. *Notice that days has a period just after it instead of a colon.* Specifying `d` and `-` are optional. These times do not take into account hours coverage associated with a policy. For example, an IF statement can test to see whether a ticket's create date/time is older than 3 days. The first value is `CreateDateTime`, the operator is `Is Less Than`, and the comparison value

is -3.00:00:00.

OLDER: Ticket Creation is less than 3 days earlier from current date/time



YOUNGER: Ticket Creation is greater than 3 days earlier from current date/time



STEP in Detail

Add a Note

Adds a note to the ticket being processed by the procedure. You choose to make the note hidden or not.

Select a note template instead of entering a note.

Note text can include an property variable in the format [`$objectname$`] or a global variable or procedure variable in the format [`=var_name=`]. See [Standard and Custom Property Variables \(page 52\)](#) for a list of property variables. See [Procedure Variables \(page 65\)](#) and [Working with Variables \(page 71\)](#) for more information about variables.

Assign Object Property

Assigns a value to the property of a *new ticket created in a previous service procedure step* using the [Create Ticket \(page 86\)](#) command.

- **The name of the global variable used to reference the New Ticket** - Enter the name of the global variable without [= and =] brackets. If multiple [Create Ticket](#) steps are included in the same procedure, each should specify a different global variable so that each new ticket can be uniquely identified in subsequent steps.
- **The name of the property to assign** - The name of the ticket property to assign.
- **The value for the property** - The value to assign the ticket property.

The set of properties that can be assigned are displayed in a drop-down list. See [Working with Variables \(page 71\)](#) for more information about variables.

Note: Use [Assign Ticket Property \(page 86\)](#) to assign a value to the property of the *current* ticket.

Assign Ticket Custom Field

Assigns a value to a custom field in a ticket. Enter the name of the custom field in the format `custom_field`, without bracket characters of any kind. Then enter a value that matches the range of possible values allowed for this custom field. The range of possible values is specified using the [Service Desk > Desk Definition > Properties > Custom Fields \(page 40\)](#) tab.

You can also enter a property variable in the format [`$objectname$`] or a global variable or

Procedures Definition

procedure variable in the format [=var_name=]. See [Standard and Custom Property Variables \(page 52\)](#) for a list of property variables. See [Procedure Variables \(page 65\)](#) and [Working with Variables \(page 71\)](#) for more information about variables.

Assign Ticket Property

Assigns a value to the property of the *current* ticket. The set of properties that can be assigned are displayed in a drop-down list. The supplied value may be a global variable name or procedure variable name in the format [=var_name=]. See [Procedure Variables \(page 65\)](#) and [Working with Variables \(page 71\)](#) for more information about variables.

Note: Use [Assign Object Property \(page 85\)](#) to assign a value to the property of a *new ticket* created using the [Create Ticket \(page 86\)](#) command.

Create Ticket

Creates a new ticket in a specified service desk.

- **The name of the service** - The name of the service desk.
- **Summary for the new ticket** - The summary of the ticket.
- **(Description)** - The description of the ticket.
- **The global variable where the reference to the new ticket** - The name of a global variable used to reference this newly created ticket in subsequent [Assign Object Property \(page 85\)](#) steps. If multiple [Create Ticket](#) steps are included in the same procedure, each should specify a different global variable so that each new ticket can be uniquely identified in subsequent steps. Enter the name of the global variable without [= and =] brackets.

Events occur in the following order:

1. [Assign Object Property](#) steps in subsequent steps assign values to the properties of the newly create ticket.
2. After the new tickets are created, if there are properties of the ticket that have not been set using [Assign Object Property](#) steps, but have defaults in the service desk, those default values are applied to the ticket.
3. If there is a stage entry procedure for the service desk associated with the new ticket's beginning stage, that is run last.

Delete a Ticket

Deletes the ticket being processed by the procedure.

Execute a Common Sub-Procedure

Causes a [sub-procedure \(page 75\)](#) to execute. Use this capability to string multiple **IF-ELSE** clauses together. You can nest the execution of procedures to 10 levels.

Execute an External Script

Executes a script written in C#. This command only displays when KSD 1.3 is installed in VSA 6.2 or later. The VBScript and JScript options are not yet implemented. See the [Execute an External Script \(http://community.kaseya.com/kb/w/wiki/execute-an-external-script.aspx\)](#) community page for details.

executeShellCommand()

Executes a shell command on the Kaseya Server. Runs from the \windows\system32 directory. For example, the shell command `dir c:\temp` runs the directory command from \windows\system32 directory but displays the directory for `c:\temp`. When running a batch file

use a `cd` command at the top of the batch file to change directories and run all subsequent commands from that directory. Separate fields are provided to direct the output of the command line to an output file or to a variable. If the output file exists, it is overwritten.

Execute SQL Non-Query

Executes an SQL non-query command on the Kaseya Server SQL Server database. This option only displays for master role users.

Warning: Direct manipulation of the Kaseya Server database can result in a massive loss of data. For example executing the **Execute SQL Non-Query** command `DELETE FROM kasadmin.SDIncident` will delete all tickets.

- **Enter the command to execute** - Specify an SQL non-query without brackets or quotes.
- **Perform Step On** - Specify the type of operating system to perform this step on.

Execute SQL Select Query

Executes an SQL select query command on the Kaseya Server SQL Server database. This option only displays for master role users. For example, the **Execute SQL Select Query** command `SELECT * FROM kasadmin.SDIncident WHERE REF='[$TicketID$]'` returns all of details for the current ticket.

- **Enter the command to execute** - Specify an SQL select query without brackets or quotes.
- **The variable where the results are stored** - Specify the variable name without brackets. Example: `var_name`.
- **Perform Step On** - Specify the type of operating system to perform this step on.

Fails the Current Ticket Transaction

If included in a procedure, cancels all changes to the ticket. Cancels both ticket changes made manually before saving the ticket and ticket changes made within the procedure being processed prior to this step being run. Does not cancel `sendEmail()` or `sendMessage()` steps processed before this step is run. *Cancels all steps in the procedure after this step is run.*

Get Agent Property

Returns a selected property value from the last audit of the agent machine associated with the ticket.

- **The vMachine property to retrieve from the agent** - See Audit > **Audit Summary** (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?6779.htm>) for a description of each property.
- **The variable to hold the value of the agent property** - Specify the variable name without brackets. Example: `var_name`.
- **Perform Step On** - Specify the type of operating system to perform this step on.

Get a Variable

Defines a new procedure variable and assigns it a value. Specify the variable name without brackets. Example: `var_name`.

You can refer to this variable in text fields in any subsequent steps by adding `[= and =]` around the variable name. Example: `[=var_name=]`. See **Procedure Variables** (page 65) and **Working with Variables** (page 71) for more information about variables.

- **Constant Value** - Enter a value for the variable.

Link to Another Ticket

Links the ticket being processed to a specified ticket ID or knowledge base article ID.

Procedures Definition

Pause Stage Goal

Pauses counting elapsed time against the current stage **goal** (page 74). Goal procedures are linked to *stages* using the Service Desk > Desk Definition > Processing > Stage > **Procedures** (page 42) tab.

Pause Ticket Goal

Pauses counting elapsed time against the ticket **goal** (page 74). The ticket goal determines the due date for the entire ticket. Goals are linked to a service desk using the Desk Definition > Properties > General > **Procedures** (page 38) tab.

Resume Stage Goal

Resumes counting elapsed time against the current stage **goal** (page 74). Goal procedures are linked to *stages* using the Service Desk > Desk Definition > Processing > Stage > **Procedures** (page 42) tab.

Resume Ticket Goal

Resumes counting elapsed time against the ticket **goal** (page 74). The ticket goal determines the due date for the entire ticket. Goals are linked to a service desk using the Desk Definition > Properties > General > **Procedures** (page 38) tab.

scheduleProcedure()

Runs a selected *agent procedure* for a specified machine. Use [`FullMachineName`] to specify the machine name and machine group, assuming a machine is associated with the ticket. Otherwise you can enter a procedure variable for the machine name or specify a fixed machine name value.

sendEmail()

Sends an email to one or more recipients. Specifies the subject and body text of the email.

Optionally check the **Send the email if the body contains the [`ChangesAsHtml`] or [`Changes`] and those properties are empty due to hidden notes**. This prevents emails with "empty" notes from being sent.

You can include property variables, global variables and procedure variables in the **To**, **From**, **Subject**, and **Body** fields of a `sendEmail()` command. You can reference property variables, global variables and procedure variables in the message templates you link to in a `sendEmail()` command. See **Standard and Custom Property Variables** (page 52) for a list of property variables. See **Procedure Variables** (page 65) and **Working with Variables** (page 71) for more information about variables.

You can also enter the name of a pool of users. Names are delimited using commas or semi-colons. The following order of precedence determines the email addresses of recipients. The name in the **To** field of a `sendEmail()` step is checked to see if it:

- Exists as a user name. If that name is found, and an email address exists for that user, then that email address is used.
- Conforms to an SMTP email address. For example, `user@domain.com`. If the name matches that pattern, that name is used for the email address. If a service desk pool name conforms to an email address, then email will be sent to that email address, not to the pool of users in that pool.
- The name is looked up as a service desk pool. The email is sent to the email addresses associated with each user in the pool.

sendMessage()

Sends a message to the **Inbox** of a user.

You can only enter one user name in the **To** field of the `sendMessage()` dialog box. Use **sendMessage() to User Pool** (page 89) to send a message to multiple users.

You can include property variables, global variables and procedure variables in the **To**, **From**, **Subject**, and **Body** fields of a `sendMessage()` command. You can reference property variables, global variables

and procedure variables in the message templates you link to in a `sendMessage()` command. See [Standard and Custom Property Variables](#) (page 52) for a list of property variables. See [Procedure Variables](#) (page 65) and [Working with Variables](#) (page 71) for more information about variables.

Sends a text message to a mobile device. **Not yet implemented.**

Converts a text message to a voice message and sends it to a mobile device. **Not yet implemented.**

Send Message to Pool Users

Sends a message to the **Inbox** of all users in a selected pool.

You can include property variables, global variables and procedure variables in the **Subject**, and **Body** fields of a **Send Message to Pool Users** command. You can reference property variables, global variables and procedure variables in the message templates you link to in a **Send Message to User Pool** command. See [Standard and Custom Property Variables](#) (page 52) for a list of property variables. See [Procedure Variables](#) (page 65) and [Working with Variables](#) (page 71) for more information about variables.

Set Escalation Time

Sets the time a ticket is escalated. Overrides the default escalation time set for a stage using the Service Desk > Desk Definition > Processing > Stage > **Procedures** (page 42) tab. The escalation time can be calculated using the coverage schedule associated with the ticket or using calendar time. For example, if a coverage schedule does not include weekend coverage, and the ticket escalation procedure runs during the weekend, escalation of the ticket will not start counting until coverage begins on Monday morning. If escalation time is calculated using:

- Calendar time, and a coverage schedule is associated with the ticket, calendar time is used.
- A coverage schedule, and no coverage schedule is associated with the ticket, calendar time is used.

Set Goal Time

Sets the time the goal for a stage is scheduled to be completed. Overrides the default goal time set for a stage using the Service Desk > Desk Definition > Processing > Stage > **Procedures** (page 42) tab.

Set Ticket Goal Time

Sets the time the goal for a ticket is scheduled to be completed. The ticket goal determines the due date for the entire ticket. Overrides the default goal time set for a ticket using the Desk Definition > New or Edit > **Procedures** (page 38) tab.

writeProcedureLogEntry()

Writes the supplied string to System > **Application Logging**
(<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?4739.htm>).

Service Desk Reports

The following **Service Desk** reports are created using Info Center > **Reporting > Reports**.

- **Service Desk - Custom Tickets** (page 90) - Displays a customizable ticket report.
- **Service Desk - Tickets** (page 92) - Displays Service Desk ticket summary information and ticket details.

Service Desk Reports

- **Service Desk - Service Goals** (page 91) - Displays summary information and ticket details related to meeting **Service Desk** goals.
- **Service Desk - Service Hours** (page 91) - Displays summary information and ticket details related to **Service Desk** hours worked.
- **Service Desk - Service Times** (page 92) - Shows how many tickets have been created, closed, resolved, past due within fixed time buckets.
- **Service Desk - Service Volumes** (page 92) - Shows the number of tickets in each month that belong to each possible value in a specified ticket column.

Service Desk - Custom Tickets

Info Center > Reporting > Reports > Service Desk - Custom Tickets

- Displays only if the **Service Desk** add-on module is installed.

The **Custom Tickets** report definition generates a report displaying **Service Desk** ticket summary information and ticket details.

Configure your report definition using the following parameters.

General

- **Service Desk**
- **Notes / Summary / Submitter Filter** - List only tickets or ticket counts containing this string in any note, summary line or submitter information line. Use * for wildcard.
- **Display all Tickets** - If checked, list all tickets individually.
- **Display Notes with each ticket** - If checked, display notes with each ticket.
- **Hide Hidden Notes** - If checked, hide hidden notes.
- **Display Ticket Status Chart for each Admin** - Displays a separate ticket status bar chart for each user plus for unassigned.
- **Display pie chart for each selected Ticket Category Column of Data** - Assignee, Status, Priority, Category, Sub Category.

Time Range

- **Select the Time Range Type** - Filters by a fixed type of date range.
- **Display all open tickets plus tickets closed within the last N days** - Applies only if Last N Days is selected time range type.
- **Custom Start DateTime** - Applies only if Fixed Range is select time range type.
- **Custom End DateTime** - Applies only if Fixed Range is select time range type.

Columns

Values for all desk definitions are displayed in the drop-down lists. Select multiple items using Ctrl+Click and Shift+Click, unless otherwise noted.

- **Sort Column** - Select the column to sort tickets on.
- **Sort Direction** - Ascending, Descending.

Filters

- **Assignee Filter** - Only one item can be selected.
- **Status Filter**
- **Priority Filter**
- **Category Filter**
- **SubCategory Filter** - Only displays subcategories for selected categories in the **Category Filter**.

Service Desk - Service Goals

Info Center > Reporting > Reports > Service Desk - Service Goals

- Displays only if the **Service Desk** add-on module is installed.

The **Service Goals** report definition generates a report displaying summary information and ticket details related to meeting **Service Desk** goals.

Configure your report definition using the following parameters:

Time Selection

- **Select the Time Range Type** - Filters by a fixed type of date range.
- **Number Of Days** - Applies only if `Last N Days` is selected time range type.
- **Custom Start DateTime** - Applies only if `Fixed Range` is select time range type.
- **Custom End DateTime** - Applies only if `Fixed Range` is select time range type.

Parameters

- **Include Only Tickets with Goals** - If checked, only tickets with goals are displayed.
- **Select Report-By Type** - `Service Goals by Ticket, Ticket Number`.
- **Sort Column** - Select the column to sort tickets on.
- **Sort Direction** - Ascending, Descending.

Service Desk - Service Hours

Info Center > Reporting > Reports > Service Desk - Service Hours

- Displays only if the **Service Desk** add-on module is installed.

The **Service Hours** report definition generates a report displaying summary information and ticket details related to **Service Desk** hours worked.

Configure your report definition using the following parameters:

Time Selection

- **Select the Time Range Type** - Filters by a fixed type of date range.
- **Number Of Days** - Applies only if `Last N Days` is selected time range type.
- **Custom Start DateTime** - Applies only if `Fixed Range` is select time range type.
- **Custom End DateTime** - Applies only if `Fixed Range` is select time range type.

Parameters

- **Include Only Tickets with Goals** - If checked, only tickets with goals are displayed.
- **Select Report-By Type** - `Service Hours by Ticket, Service Hours by Contributor, Service Hours by Organization`.
- **Sort Column** - Select the column to sort tickets on.
- **Sort Direction** - Ascending, Descending.

Service Desk - Service Times

Info Center > Reporting > Reports > Service Desk - Service Times

- Displays only if the **Service Desk** add-on module is installed.

The **Service Times** report definition generates a 12-month report, starting with a specified month and year, showing how many tickets have been created, closed, resolved, past due within fixed time buckets.

Configure your report definition using the following parameters:

Parameters

- **Month** - Select a month.
- **Year** - Select a year.
- **Display Tickets Created** - If checked, display tickets created.
- **Display Tickets Closed** - If checked, display tickets closed.
- **Display Tickets Resolved** - If checked, display tickets resolved.
- **Display Tickets Past Due** - If checked, display tickets past due.
- **Display Ticket Service Time Details Tables** - If checked, display tickets detail tables.

Service Desk - Service Volumes

Info Center > Reporting > Reports > Service Desk - Service Volumes

- Displays only if the **Service Desk** add-on module is installed.

The **Service Volumes** report definition generates a 12-month report, starting with a specified month and year, showing the number of tickets in each month that belong to each possible value in a specified ticket column.

Configure your report definition using the following parameters:

Parameters

- **Group by** - Select the column to group by.
- **Sort Column Direction** - Ascending, Descending.
- **Month** - Select a month.
- **Year** - Select a year.
- **Display Ticket Volumes Chart** - If checked, display a tickets volumes chart.

Service Desk - Tickets

Info Center > Reporting > Reports > Service Desk - Tickets

- Displays only if the **Service Desk** add-on module is installed.

The **Tickets** report definition generates a report displaying **Service Desk** ticket summary information and ticket details.

Configure your report definition using the following parameters:

Time Selection

- **Select the Time Range Type** - Filters by a fixed type of date range.

- **Display all open tickets plus tickets closed within the last N days** - Applies only if `Last N Days` is selected time range type.
- **Custom Start DateTime** - Applies only if `Fixed Range` is select time range type.
- **Custom End DateTime** - Applies only if `Fixed Range` is select time range type.

Parameters

- **Notes / Summary / Submitter Filter** - List only tickets or ticket counts containing this string in any note, summary line or submitter information line. Use `*` for wildcard.
- **Display all Tickets** - If checked, list all tickets individually.
- **Display Notes with each ticket** - If checked, display notes with each ticket.
- **Hide Hidden Notes** - If checked, hide hidden notes.
- **Sort Column** - Select the column to sort tickets on.
- **Sort Direction** - Ascending, Descending.
- **Display Ticket Status Chart for each Admin** - Displays a separate ticket status bar chart for each user plus for unassigned.
- **Display pie chart for each selected Ticket Category Column of Data** - Assignee, Status, Priority, Category, Sub Category.

Column Filters

Values for all desk definitions are displayed in the drop-down lists. Select multiple items using `Ctrl+Click` and `Shift+Click`, unless otherwise noted.

- **Assignee Filter** - Only one item can be selected.
- **Status Filter**
- **Priority Filter**
- **Category Filter**
- **SubCategory Filter** - Only displays subcategories for selected categories in the **Category Filter**.

KSD API Web Service

- [Enabling KSD API Web Service](#) (page 95)
- [KSD API Web Service Data Types](#) (page 95)
- [KSD API Web Service - Operations](#) (page 102)
- [Sample Messages](#) (page 105)

Enabling KSD API Web Service

See the [VSA API Web Service](http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?3433.htm) (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?3433.htm>) online help or user guide for a general introduction to the Kaseya API.

To enable the KSD API Web Service:

- Display the System > [Configure](http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?248.htm) (<http://help.kaseya.com/WebHelp/EN/VSA-Online-Help.asp?248.htm>) page in the VSA.
- Check the [Enable VSA API Web Service](#) checkbox.
- Access the KSD API web service using `http://<your-KServer>/vsaWS/vsaServiceDeskWS.asmx`

KSD API Web Service Data Types

The following are the major data types used in the [KSD API Web Service](#). These data types are defined in the XML schema document in the `XML\Schemas\ServiceDesk\ServiceDeskDefinition.xsd` file located in the directory where the Kaseya software is installed.

Note: In the descriptions that follow, where the name says (content) that means the value is the content of the element.

Legend

- A - AddIncident
- G - GetIncident
- L - ListIncidents
- U - UpdateIncident

RefItem

The [RefItem](#) describes an item that is a reference item in the service desk. These have an internal database ID value, an internal name, an optional description and the display value.

G	ref	string	The internal name of the item. This is usually prefixed by the service desk name and , such as Standard Open.
G	id	string	The internal database key for the item.
G	description	string	The optional description for the item.
G	(content)	string	The user readable form of the item.

CustomField

The **CustomField** describes the value of a custom field in an incident.

AGU	fieldName	string	The name of the field within the service desk.
AGU	(content)	string	The value of the custom field.

Note

The **Note** describes a single note attached to a ticket.

G	User	string	The name of the user that created the note.
G	Timestamp	dateTime	The time the note was created.
AG	Text	string	The content of the note. This may be HTML formatted, and may include references to attachments.
AG	Hidden	boolean	True if the note should be hidden.
AG	HoursWorked	Decimal	The number of hours worked in this update of the ticket.
AG	SuppressNotify	Boolean	True if notifications for this update should be suppressed.

Attachment

The **Attachment** describes a single attachment for the ticket.

A	Name	string	A unique identifying string for this attachment.
A	DisplayName	string	The name of the attachment as seen by the user.
A	FileName	string	The original name of the file or URL.
A	DocumentType	string	The MIME format of the attachment.
A	Content	Base64Binary	The base 64 encoded content for the attachment.

RelatedIncident

The **RelatedIncident** is another incident that has been related to this current incident

AGU	IncidentNumber	string	The unique identifier for the incident.
G	Summary	string	The summary of the related incident.
G	Status	string	The user readable status of the related incident.
G	Description	string	The description field of the incident.

ServiceDeskDefinition

The following **ServiceDeskDefinition** elements returned describe the desk definition used to edit the ticket. This provides each of the possible values for each field in the ticket.

A single record of the following elements returned.

ServiceDeskDefinition	id="decimal"	A unique identifier.
Name	string	The name of the desk definition.
Description	string	A brief description of the desk definition.
RequireTime	boolean	If true, entering hours worked is required.
DisplayMachineInfo	boolean	If true, machine lookup field is displayed.
RequireMachineInfo	boolean	If true, machine lookup association is required.
DisplayOrgInfo	boolean	If true, organization lookup field is displayed.
RequireOrgInfo	boolean	If true, organization lookup association is required.
DisplayCI	boolean	obsolete
RequireCI	boolean	obsolete
AllAdmins	boolean	obsolete
AutoStartClock	boolean	If true, a clock is automatically started when the user starts to edit the ticket.
AutoSaveClock	boolean	If true, when the ticket is saved, the difference between the current time and the start time is entered as the Hours Worked.
AutoInsertNote	boolean	If true, notes are automatically added to each ticket for the changes made to the ticket.
AutoInsertNoteHidden	boolean	If true, automatically generated notes are made hidden.
NeedStatusNote	boolean	obsolete
SDPrefix	string	The prefix code added to the beginning of the ticket ID.
DefaultStatus	decimal	Default status value. Refers to one of the elements with the matching id attribute in the Status section.
DefaultStage	decimal	Default stage value. Refers to one of the elements with the matching id attribute in the Stage section.
DefaultPriority	decimal	Default priority value. Refers to one of the elements with the matching id attribute in the Priority section.
DefaultSeverity	decimal	Default severity value. Refers to one of the elements with the matching id attribute in the Severity section.
DefaultResolution	decimal	Default resolution value. Refers to one of the elements with the matching id attribute in the Resolution section.
DefaultCategory	decimal	Default category value. Refers to one of the elements with the matching id attribute in the Category section.
DefaultSubCategory	decimal	Obsolete
DefaultServiceDesk	boolean	If true, this is the default service desk, the first one selected when creating new tickets.
TemplateName	string	The template file used to initially create the service desk. Not used otherwise.
TemplateType	int	The type of service desk: 1=ticket, 3=knowledge base.
SequenceName	string	For internal development use only.
EditingTemplate	string	The name of the form used to edit tickets for the service desk.
ShowNotesPane	boolean	If true, notes pane displays in lower pane of Tickets table.
ShowWorkOrders	boolean	If true, display work order and work order line in ticket editor.

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ShowSessionTimers	boolean	If true, display session timers in ticket editor.
ShowTasks	boolean	If true, display tasks tab and task related fields.
EstimatedHours	double	Total number of hours worked estimated to resolve this ticket.
ActualHours	double	Total number of hours entered to resolve this ticket.
EmailReader	string	The email reader associated with the service desk.
Administrator	string	The user that is the "desk administrator" of the service desk. The desk administrator is notified of certain errors within the service desk.
DefaultPolicy	string	The default policy assigned to the desk.
Status	RefItem	Returns a list of child elements of each Status value in the service desk.
Priority	RefItem	Returns a list of child elements of each Priority value in the service desk.
Severity	RefItem	Returns a list of child elements of each Severity value in the service desk.
Resolution	RefItem	Returns a list of child elements of each Resolution value in the service desk.
TaskStatus	RefItem	Returns a list of child elements of each TaskStatus value in the service desk.
Categories	RefItem	Returns a list of child elements of each Category value in the service desk. Each Category can include child SubCategory elements if they exist.
Stages		<p>Returns a list of child elements of each Stage value in the service desk. Each Stage is identified by a Begin, Middle, or End stagetype attribute. Each stage has the following child elements:</p> <ul style="list-style-type: none"> • Item - The name of the stage. • Initialization - The Stage Entry procedure linked to the stage. • Escalation - The Escalation procedure linked to the stage. Time and Units are specified as attributes. • Goal - The Goal linked to the stage. The Goal procedure linked to the stage. Time and Units are specified as attributes. • NextStage – One of the next stages that this stage may transition to.
Participants	RefItem	The list of users as pools that may be assignees or owners for the service desk.
CurrentContact		<p>Contact information about the user logged on during this transaction. If the user is associated with a staff record, then the <code>CurrentContact</code> information is culled from the staff record. If the currently logged on user is a machine user using Portal Access, then <code>CurrentContact</code> information is culled from the Home > Change Profile tab of Portal Access.</p> <ul style="list-style-type: none"> • ContactName • PhoneNumber • Organization • EmailAddress
SubmitterTypes	string	<p>Type of person submitting the ticket:</p> <ul style="list-style-type: none"> • UNKNOWN • PARTICIPANT - A participant is a VSA user. • USER - Someone not known to VSA.

CustomFields		Returns zero or more Field elements, each with the following hierarchy: <ul style="list-style-type: none"> • Caption - Screen caption. • Title - Report title. • Fieldname - Name of the field. • FieldFormat - Data type. • DefaultValue - Default value, if a List data type. • Values - collection element, if a List data type. <ul style="list-style-type: none"> ○ Item - List item value.
AccessRights		Returns a hierarchy of child elements: <ul style="list-style-type: none"> • ViewHiddenNotes - true or false • ChangeHiddenNotes - true or false • Field Rights>Field Right - collection elements <ul style="list-style-type: none"> ○ FieldName - Name of the ticket field ○ AccessType - Required, Edit, View Only, Hidden
NoteTemplates		Returns a list of note templates, each representing standard text that can be added to ticket notes.
ChangeProcedure	string	The Change Ticket procedure associated with the service desk.
GoalProcedure	decimal	The Goal procedure associated with the service desk. <ul style="list-style-type: none"> • time – the amount of time for goal • unit – The units of time • (content) – the name of the goal procedure.
ResourceTypes		The list of resource types that can be assigned to a ticket.
TaskDefinitions		The list of task values that can be assigned to a task status.
AssocPolicies		The list of policies that can be associated with a ticket.

Incident Summary

The **IncidentSummary** contains the basic description of a ticket.

AGLU	ServiceDeskName	string	The name of the desk definition.
GLU	IncidentNumber	string	The ticket identifier.
AGLU	Summary	string	The ticket summary text.
AGLU	Description	string	The ticket description. text.
AGLU	Status	string	The ref status of the ticket.
AGLU	Priority	string	The ref priority of the ticket.
AGLU	Resolution	string	The ref resolution type of the ticket.
AGLU	Stage	string	The ref stage of the ticket.
AGLU	Severity	string	The ref severity of the ticket.
AGLU	Category	string	The ref category of the ticket.
AGLU	SubCategory	string	The ref subcategory of the ticket.
GL	Policy	string	The policy of the ticket.
GL	CreateDateTime	dateTime	The date time the ticket was created.
GL	LastEditDateTime	dateTime	The date time the ticket was last edited.

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GL	CloseDateTime	dateTime	The date time the ticket was closed.
AGLU	OrgID	decimal	Unique identifier of the organization associated with the ticket.
AGLU	OrganizationName	string	The organization name associated with the ticket.
AGLU	Organization	string	The organization ID associated with the ticket.
AGLU	OrganizationStaffName	string	The organization staff member name associated with the ticket.
AGLU	OrganizationStaff	string	The organization staff member unique ID associated with the ticket.
AGLU	OrganizationStaffEmail	string	The email of the organization staff member associated with the ticket.
AGLU	Machine	string	The machine associated with the ticket.
AGLU	MachineGuid	decimal	The GUID of the machine associated with the ticket.
AGLU	MachineGroup	string	The machine group of the machine associated with the ticket.
AGLU	MachineGroupGuid	decimal	The GUID of the machine group associated with the the ticket.
AGLU	Submitter	string	The name of the submitter who submitted the ticket.
AGLU	SubmitterEmail	string	The email of the ticket submitter.
AGLU	SubmitterPhone	string	The phone of the ticket submitter.
AGLU	SubmitterType	string	Type of person submitting the ticket: <ul style="list-style-type: none"> UNKNOWN PARTICIPANT - A participant is a VSA user. USER - Someone not known to VSA.
GL	IsUnread	boolean	If true, the ticket has not been viewed by the currently logged on user.

Incident

The **Incident** is derived from the **IncidentSummary** and contains all of the fields of the **IncidentSummary** in addition to these fields.

G	IsParticipant	boolean	obsolete
G	IsClosed	boolean	True if closed.
G	CurrentStageEscalationDateTime	dateTime	Stage escalation date and time.
G	CurrentGoalDateTime	dateTime	Stage goal date and time.
AGU	Owner	string	Owner of the ticket.
	Participant	string	obsolete
AGU	AssigneeType	string	Type of assignee: <ul style="list-style-type: none"> UNKNOWN PARTICIPANT - individual assignee POOL - a pool of users
AGU	Assignee	string	Assignee name.
AGU	AssigneeEmail	string	Assignee email.
G	ActualCompletionDate	dateTime	obsolete

G	ExpectedCompletionDate	dateTime	Date time the ticket is or was expected to be closed, (the ticket goal due date).
G	ActualResolutionDate	dateTime	Date time a resolution type was set for the ticket.
AGU	PromisedDate	dateTime	Date time promise date entered by the customer representative to resolve the ticket.
G	IsArchived	boolean	True if ticket is archived.
G	IsError	boolean	obsolete
G	IsPoolAssignee	boolean	obsolete
	ErrorMessage	string	obsolete
	Notify	boolean	obsolete
G	CurrentStage	string	The current stage.
AGU	ResolutionNote	string	Descriptive text entered with the resolution type.
G	LockTime	dateTime	Date time the ticket was locked by opening the ticket for editing.
G	LockUser	string	User locking the ticket by opening the ticket for editing.
G	StageGoalTimeRemaining	int	The time remaining before the stage goal timer executes the goal procedure. Rrelevant when the stage goal has been paused.
AGU	SourceType	string	The source type, either a system event or email, that generated a ticket request. <ul style="list-style-type: none"> • Email • Backup • KES • Patch • Monitor • Alarm • Portal • ServiceDesk • Other
	OrgAddress/Address	string	Org address 1
	OrgAddress/Address	string	Org address 2
	OrgAddress/City	string	Org city
	OrgAddress/State	string	Org state
	OrgAddress/Zip	string	Org zip
	OrgAddress/Country	string	Org address
AGLU	Field	CustomField	Zero or more custom fields values
AGU	Notes	Note	Zero or more notes.
AGU	Attachments	Attachment	Zero or more attachments
AGU	RelatedIncidents	Related Incident	Zero or more related incidents
	StartDate	datetime	start date/time of the task
	EndDate	datetime	end date/time of the task
	UpdateTime	datetime	last date/time this task was updated
	FollowupDate	datetime	date/time to followup on this task

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	CompletionDate	datetime	completion date/time of this task
	ApprovalDate	datetime	approval date/time of this task
	PromiseDate	datetime	promise date/time for this task
	PercentCompletion	int	percent completion of this task
	TaskStatus	string	status of this task
	ActualHours	double	total hours worked for this task
	Resource	Resource	Zero or more resources
	Assignee	string	assignee assigned to this task
	EstimatedHours	decimal	Estimated total hours worked for this ticket.
	TotalHours	decimal	Actual hours worked for this ticket.
	PreviousStage	string	PreviousStage of this ticket.
	WorkPerformedDateTim e	datetime	Datetime work was performed on this ticket.
	EditingTemplate	string	Editing template used to edit this ticket.
GU	ServiceDeskDefinition	ServiceDesk Definition	

KSD API Web Service - Operations

The following operations can be performed using the [KSD API Web Service](#).

AddIncident

The request is:

AddSDIncident	Incident	The content of the new incident to create. Only fields marked with an A in the first column can be set.
SessionId	Decimal	The web service session ID.

A single record of the following fields is returned.

IncidentNumber	string	The unique identifier of the ticket.
IncidentID	decimal	The identifier of the ticket.
Method	string	The operation that requested this response.
TransactionID	decimal	The unique message ID for this message.
ErrorMessage	string	If blank, no error was returned.
ErrorLocation	string	If blank, no error was returned.

AddServDeskToScope

The request is:

servDeskName	string	The name of the service desk.
scopeName	string	The name of the scope.
SessionId	decimal	The web service session ID.

A single record of the following fields is returned.

Method	string	The operation that requested this response.
TransactionID	decimal	The unique message ID for this message.
ErrorMessage	string	If blank, no error was returned.
ErrorLocation	string	If blank, no error was returned.

GetIncident

Retrieves a single incident from the database. The request is:

IncidentRequest		The incident to retrieve. This has the following fields: <ul style="list-style-type: none"> • IncidentNumber – The ticket ID as seen by the user, such as STD000001 • IncidentId – The database ID of the ticket to retrieve. • IncludeNotes – true to include notes in the retrieved ticket • IncludeDefinition – true to include the desk definition in the response
SessionId	Decimal	The web service session ID.

A single record of the following fields is returned.

IncidentResponse	Incident	The retrieved incident.
Method	string	The operation that requested this response.
TransactionID	decimal	The unique message ID for this message.
ErrorMessage	string	If blank, no error was returned.
ErrorLocation	string	If blank, no error was returned.

GetIncidentList

Retrieve a list of incidents matching the request criteria. The request is:

IncidentRequest		The incident to retrieve. This has the following fields: <ul style="list-style-type: none"> • ServiceDeskName – The name of the service desk to query. • Status – One or more status values to match. If no status values are supplied, then tickets are retrieved regardless of status. • Priority – One or more priority values to match. If no priority values are supplied, then tickets are retrieved regardless of priority. • Stage – One or more stage values to match. If no stage values are supplied, then tickets are retrieved regardless of stage. • Summary – a string or expression to search the summary of tickets. • Organization – The name or partial name of organizations to match. If not supplied, then tickets are retrieved for all organizations within the scope. • OrganizationStaff – The name of an organizational staff member. associated with tickets. If not supplied, then tickets are retrieved for all organizations within the scope.
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		<ul style="list-style-type: none"> Machine – The name of a machine to match. If not supplied, then tickets are retrieved for all machines within the scope. MachineGroup – The name of a machine group to match. If not supplied, then tickets are retrieved for all machine groups within the scope. Assignee – The name or partial name of assignees to match. If not supplied, then tickers are retrieved for all assignees within scope. StartingIncident – When paging, this is the next incident number to retrieve. This value comes from the nextStartingIncident value of a previous GetIncidentList request. IncidentCount – When present, specifies the number of incidents to retrieve. SortField – When present, sorts the results on the field name.
SessionId	Decimal	The web service session ID.

The response is the following:

IncidentList		<p>The list of matching incidents. This has the following attributes and elements:</p> <ul style="list-style-type: none"> totalIncidents – The total number of incidents that match the request. nextStartingIncident – the Id of the next incident to retrieve. Incident – zero or more incident matching the request criteria.
SessionId	Decimal	The web service session ID.

GetServiceDesk

Retrieves the definition of a service desk. This should be called prior to creating a user interface to allow the user to enter a ticket. The request is:

ServiceDeskDefinitionRequest		<p>The service desk to retrieve. This has the following elements:</p> <ul style="list-style-type: none"> ServiceDeskName – The name of the service desk to retrieve. ServiceDeskID – the database of the service desk to retrieve. Should not be used.
SessionId	Decimal	The web service session ID.

A single record of the following elements returned.

ServiceDeskDefinitionResponse	ServiceDeskDefinition	The retrieved desk definition.
Method	string	The operation that requested this response.
TransactionID	decimal	The unique message ID for this message.
ErrorMessage	string	If blank, no error was returned.
ErrorLocation	string	If blank, no error was returned.

GetServiceDesks

Multiple records of the following fields are returned, if applicable. The request is:

IsDefault	boolean	If true, the service desk is the default service desk.
ServiceDeskID	decimal	A unique identifier.

ServiceDeskName	string	The name of the service desk.
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A single record of the following fields is returned.

Method	string	The operation that requested this response.
TransactionID	decimal	The unique message ID for this message.
ErrorMessage	string	If blank, no error was returned.
ErrorLocation	string	If blank, no error was returned.

Primitives

The following primitive Datatype operations are also provided. Each primitive operation uses the same xml contract as their corresponding multiple-columns operation. Each primitive returns a string value that requires subsequent processing. You are strongly discouraged from using these methods.

Primitive	Result	Datatype
PrimitiveAddIncident	PrimitiveAddIncidentResult	string
PrimitiveAddServDeskToScope	PrimitiveAddServDeskToScopeResult	string
PrimitiveGetIncident	PrimitiveGetIncidentResult	string
PrimitiveGetIncidentList	PrimitiveGetIncidentListResult	string
PrimitiveGetServiceDesk	PrimitiveGetServiceDeskResult	string
PrimitiveGetServiceDesks	PrimitiveGetServiceDesksResult	string
PrimitiveUpdateIncident	PrimitiveUpdateIncidentResult	string

UpdateIncident

Updates a single incident in the database. The request is:

UpdateSDIncident	Incident	The incident to update. See the first column of the Incident data type for the fields that are valid on update.
SessionId	Decimal	The web service session ID.

A single record of the following fields is returned.

Method	string	The operation that requested this response.
TransactionID	decimal	The unique message ID for this message.
ErrorMessage	string	If blank, no error was returned.
ErrorLocation	string	If blank, no error was returned.

Sample Messages

Sample data is included in the following XMLs.

GetServiceDesks Request

```
<GetServiceDesks xmlns="vsaServiceDeskWS">
  <req>
    <SessionID>62648424383576321292545755</SessionID>
  </req>
</GetServiceDesks>
```

GetServiceDesks Response

```
<GetServiceDesksResponse xmlns="vsaServiceDeskWS">
  <GetServiceDesksResult>
    <ServiceDesks>
      <ServiceDesk>
        <IsDefault>>false</IsDefault>
        <ServiceDeskID>291273277175176</ServiceDeskID>
        <ServiceDeskName>KnowledgeBase</ServiceDeskName>
      </ServiceDesk>
      <ServiceDesk>
        <IsDefault>>false</IsDefault>
        <ServiceDeskID>696191121914314</ServiceDeskID>
        <ServiceDeskName>Standard</ServiceDeskName>
      </ServiceDesk>
    </ServiceDesks>
    <Method>GetServiceDesks</Method>
    <TransactionID>144</TransactionID>
    <ErrorMessage/>
    <ErrorLocation/>
  </GetServiceDesksResult>
</GetServiceDesksResponse>
```

GetServiceDesk Request

```
<GetServiceDesk xmlns="vsaServiceDeskWS">
  <req>
    <ServiceDeskDefinitionRequest>
      <ServiceDeskName
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Standard</ServiceDeskName
>
      <ServiceDeskID
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">696191121914314</ServiceD
eskID>
    </ServiceDeskDefinitionRequest>
    <SessionID>62648424383576321292545755</SessionID>
  </req>
</GetServiceDesk>
```

GetServiceDesk Response

```
<GetServiceDeskResponse xmlns="vsaServiceDeskWS">
  <GetServiceDeskResult>
    <ServiceDeskDefinitionResponse id="696191121914314">
      <Name
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Standard</Name>
      <Description
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Standard SD</Description>
      <RequireTime
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">>true</RequireTime>
      <DisplayMachineInfo
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">>true</DisplayMachineInfo>
      <RequireMachineInfo
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">>false</RequireMachineInfo
>
      <DisplayOrgInfo
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">>true</DisplayOrgInfo>
      <RequireOrgInfo
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">>true</RequireOrgInfo>
```



```

    <DisplayCI
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">false</DisplayCI>
    <RequireCI
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">false</RequireCI>
    <AllAdmins
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">false</AllAdmins>
    <AutoStartClock
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">false</AutoStartClock>
    <AutoSaveClock
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">true</AutoSaveClock>
    <AutoInsertNote
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">false</AutoInsertNote>
    <AutoInsertNoteHidden
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">true</AutoInsertNoteHidden>
    <NeedStatusNote
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">false</NeedStatusNote>
    <SDPrefix
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">STD</SDPrefix>
    <DefaultStatus
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">218924116119912</DefaultStatus>
    <DefaultStage
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">831768438118427</DefaultStage>
    <DefaultPriority
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">693719171716599</DefaultPriority>
    <DefaultSeverity
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">0</DefaultSeverity>
    <DefaultResolution
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">0</DefaultResolution>
    <DefaultCategory
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">0</DefaultCategory>
    <DefaultSubCategory
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">0</DefaultSubCategory>
    <DefaultServiceDesk
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">false</DefaultServiceDesk>
    <TemplateType
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">1</TemplateType>
    <SequenceName
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">SEQ129</SequenceName>
    <EditingTemplate
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Fixed_Width_Tabbed.xml</EditingTemplate>
    <Status xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">
      <Item ref="Standard|AwaitingHardware" id="541491145218711">Awaiting Hardware</Item>
      <Item ref="Standard|AwaitingUserFeedback" id="281767467828324">Awaiting User
Feedback</Item>
      <Item ref="Standard|Closed" id="989295147216226">Closed</Item>
      <Item ref="Standard|Escalated" id="551271771474242">Escalated</Item>
      <Item ref="Standard|Hold" id="172151822788151">Hold</Item>
      <Item ref="Standard|InProgress" id="111313126312233">In Progress</Item>
      <Item ref="Standard|New" id="218924116119912">New</Item>
    </Status>
    <Priority xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">
      <Item ref="Standard|CriticalHigh" id="744512181719881">Critical High</Item>
      <Item ref="Standard|High" id="982525519923522">High</Item>
      <Item ref="Standard|Low" id="291721863176342">Low</Item>
      <Item ref="Standard|Medium" id="693719171716599">Medium</Item>
      <Item ref="Standard|Planning" id="176222131631332">Planning</Item>
    </Priority>
    <Severity xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">
      <Item ref="Standard|CompanyWide (High)" id="315477225242249">Whole Company
(High)</Item>
      <Item ref="Standard|MultipleUsers (Medium)" id="262164368749722">Multiple users
(Medium)</Item>
      <Item ref="Standard|OneUser (Low)" id="917688316816914">Single User (Low)</Item>
    </Severity>
    <Resolution xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">

```

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```
<Item ref="Standard||AdviceGiven" id="498162732192611">Advice Given</Item>
<Item ref="Standard||CannotDuplicate" id="262514419248621">Cannot Duplicate</Item>
<Item ref="Standard||ClosedbyCustomerRequest" id="525192125718333">Closed by Customer
Request</Item>
<Item ref="Standard||HardwareReplaced" id="432262321578326">Hardware Replaced</Item>
<Item ref="Standard||HotFixReleased" id="189239616133249">Hot Fix Released</Item>
<Item ref="Standard||InstallationCompleted" id="139764799836252">Installation
Completed</Item>
<Item ref="Standard||NewSoftwareInstalled" id="521637923418319">New Software
Installed</Item>
<Item ref="Standard||Noresponsefromuser" id="115424612244857">No response from
user</Item>
<Item ref="Standard||OSReinstalled" id="531617444692623">OS Reinstalled</Item>
<Item ref="Standard||Other" id="711261961631328">Other</Item>
<Item ref="Standard||PassedtoSales" id="191482475814123">Passed to Sales</Item>
<Item ref="Standard||Pendingscriptcleared" id="762515513181192">Pending script
cleared</Item>
<Item ref="Standard||ReapplySchema" id="525317525441497">Reapply Schema</Item>
<Item ref="Standard||Reboot" id="832182442825238">Reboot</Item>
<Item ref="Standard||ResolvedbyCustomer" id="243623591961272">Resolved by
Customer</Item>
<Item ref="Standard||ResolvedbyTechnition" id="423939164212169">Resolved</Item>
<Item ref="Standard||SolvedwithKBarticle" id="272199179212412">Solved with KB
article</Item>
<Item ref="Standard||TrainingGiven" id="622224812237126">Training Given</Item>
</Resolution>
<Categories xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">
<Category>
<Item ref="Standard||Advice&Guidance" id="161211171768212">Advice &
Guidance</Item>
<SubCategory ref="Standard||Advice&Guidance||General"
id="561699795215782">General</SubCategory>
</Category>
<Category>
<Item ref="Standard||Kaseya" id="641881726251641">Kaseya</Item>
<SubCategory ref="Standard||Kaseya||AgentIcon" id="821781865922435">Agent
Icon</SubCategory>
<SubCategory ref="Standard||Kaseya||Alarm" id="481422361723261">Alarm</SubCategory>
<SubCategory ref="Standard||Kaseya||ApplicationChanges"
id="525187874623717">Application Changes</SubCategory>
<SubCategory ref="Standard||Kaseya||Disk" id="919621482151882">Disk</SubCategory>
<SubCategory ref="Standard||Kaseya||Eventlog"
id="814714713317798">Eventlog</SubCategory>
<SubCategory ref="Standard||Kaseya||GetFile" id="322618792314914">Get
File</SubCategory>
<SubCategory ref="Standard||Kaseya||Hardware"
id="176166136238942">Hardware</SubCategory>
<SubCategory ref="Standard||Kaseya||Lanwatch"
id="214791394922624">Lanwatch</SubCategory>
<SubCategory ref="Standard||Kaseya||Logon_Admin"
id="943315515116292">Logon_Admin</SubCategory>
<SubCategory ref="Standard||Kaseya||Logon_User"
id="636613429245187">Logon_User</SubCategory>
<SubCategory ref="Standard||Kaseya||NewAgent" id="557214511134217">New
Agent</SubCategory>
<SubCategory ref="Standard||Kaseya||Other" id="631281678197153">Other</SubCategory>
<SubCategory ref="Standard||Kaseya||PatchManagement" id="462824113621914">Patch
Management</SubCategory>
<SubCategory ref="Standard||Kaseya||Procedure"
id="274262311559714">Procedure</SubCategory>
<SubCategory ref="Standard||Kaseya||RCDisabled" id="641624812335116">RC
Disabled</SubCategory>
<SubCategory ref="Standard||Kaseya||Script"
id="471482131991414">Script</SubCategory>
<SubCategory ref="Standard||Kaseya||SystemOffline" id="113411182222324">System
Offline</SubCategory>
<SubCategory ref="Standard||Kaseya||SystemOnline" id="251814418923368">System
Online</SubCategory>
<SubCategory ref="Standard||Kaseya||Unidentified"
id="617313577253122">Unidentified</SubCategory>
</Category>
```

```

    <Category>
      <Item ref="Standard||Network" id="414766231875111">Network</Item>
      <SubCategory ref="Standard||Network||Connectivity"
id="122145211361321">Connectivity</SubCategory>
      <SubCategory ref="Standard||Network||Design"
id="495611529142242">Design</SubCategory>
      <SubCategory ref="Standard||Network||Firewall"
id="812515316323522">Firewall</SubCategory>
      <SubCategory ref="Standard||Network||Other" id="946227769167531">Other</SubCategory>
      <SubCategory ref="Standard||Network||Performance"
id="941891772111717">Performance</SubCategory>
    </Category>
    <Category>
      <Item ref="Standard||Printer" id="155243642251342">Printer</Item>
      <SubCategory ref="Standard||Printer||Other" id="341431321188813">Other</SubCategory>
      <SubCategory ref="Standard||Printer||PrinterProblem" id="851831547314111">Printer
Problem</SubCategory>
      <SubCategory ref="Standard||Printer||PrinterSetup" id="619395216749723">Printer
Setup</SubCategory>
      <SubCategory ref="Standard||Printer||Toner" id="161984536861723">Toner</SubCategory>
    </Category>
    <Category>
      <Item ref="Standard||ServiceRequest" id="541124124415221">Service Request</Item>
      <SubCategory ref="Standard||ServiceRequest||EquipmentMove"
id="862712311517672">Equipment Move</SubCategory>
      <SubCategory ref="Standard||ServiceRequest||NewLaptop" id="266812518245792">New
Laptop</SubCategory>
      <SubCategory ref="Standard||ServiceRequest||NewServer" id="322872913227349">New
Server</SubCategory>
      <SubCategory ref="Standard||ServiceRequest||NewWorkstation" id="224115236352441">New
Workstation</SubCategory>
    </Category>
  </Categories>
  <Stages xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">
    <Stage stageType="End">
      <Item ref="Standard||Closed" id="213813735111171" description="Auto
Generated">Closed</Item>
      <Initialization>Standard Enters Closed</Initialization>
    </Stage>
    <Stage stageType="Begin">
      <Item ref="Standard||Identified" id="831768438118427" description="New ticket is
received">Identified</Item>
      <Initialization>Standard Enters Identified</Initialization>
      <Escalation time="15" unit="MINUTE">Incident is Escalated</Escalation>
      <Goal time="1" unit="HOURL">Identified Goal</Goal>
      <NextStage ref="Standard||Tier1" id="546812745461511" description="Tier 1
Support">Tier1</NextStage>
    </Stage>
    <Stage stageType="Middle">
      <Item ref="Standard||Tier1" id="546812745461511" description="Tier 1
Support">Tier1</Item>
      <Initialization>Standard Enters Tier1</Initialization>
      <Escalation time="3" unit="HOURL">Incident is Escalated</Escalation>
      <Goal time="2" unit="HOURL">Tier1 Goal</Goal>
      <NextStage ref="Standard||Closed" id="213813735111171" description="Auto
Generated">Closed</NextStage>
      <NextStage ref="Standard||Tier2" id="318527191192719" description="Tier 2 Specialist
Support">Tier2</NextStage>
    </Stage>
    <Stage stageType="Middle">
      <Item ref="Standard||Tier2" id="318527191192719" description="Tier 2 Specialist
Support">Tier2</Item>
      <Initialization>Standard Enters Tier2</Initialization>
      <Escalation time="3" unit="HOURL">Incident is Escalated</Escalation>
      <Goal time="4" unit="HOURL">Tier2 Goal</Goal>
      <NextStage ref="Standard||Closed" id="213813735111171" description="Auto
Generated">Closed</NextStage>
    </Stage>
  </Stages>
  <Participants xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">
    <Participant ref="garyw" id="67511883639135112891416313"

```

KSD API Web Service

```
isPool="false">garyw</Participant>
  <Participant ref="jschenck" id="72381729521421633172123416"
isPool="false">jschenck</Participant>
  <Participant ref="NickT" id="96171921315349923924634249"
isPool="false">NickT</Participant>
  <Participant ref="Standard|SupportManager" id="654222596258293"
isPool="true">SupportManager (Pool)</Participant>
  <Participant ref="Standard|Tier1Support" id="352161952139188"
isPool="true">Tier1Support (Pool)</Participant>
  <Participant ref="Standard|Tier2Support" id="921522231318131"
isPool="true">Tier2Support (Pool)</Participant>
</Participants>
<CustomFields xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">
  <Field id="221552971661261">
    <Caption>Source</Caption>
    <Title>Source</Title>
    <FieldName>Source</FieldName>
    <FieldFormat>List</FieldFormat>
    <DefaultValue>Call</DefaultValue>
    <Values>
      <Item ref="Call" id="0">Call</Item>
      <Item ref="EMail" id="0">EMail</Item>
      <Item ref="Text" id="0">Text</Item>
    </Values>
  </Field>
  <Field id="818831117157241">
    <Caption>Urgency</Caption>
    <Title>Urgency</Title>
    <FieldName>Urgency</FieldName>
    <FieldFormat>List</FieldFormat>
    <DefaultValue>Medium</DefaultValue>
    <Values>
      <Item ref="High" id="0">High</Item>
      <Item ref="Low" id="0">Low</Item>
      <Item ref="Medium" id="0">Medium</Item>
    </Values>
  </Field>
  <Field id="513119818455188">
    <Caption>KB Article created</Caption>
    <Title>KB Article Created</Title>
    <FieldName>KB_Article</FieldName>
    <FieldFormat>List</FieldFormat>
    <DefaultValue>No</DefaultValue>
    <Values>
      <Item ref="No" id="0">No</Item>
      <Item ref="Yes" id="0">Yes</Item>
    </Values>
  </Field>
  <Field id="291214644251233">
    <Caption>Dept</Caption>
    <Title>Department</Title>
    <FieldName>Dept</FieldName>
    <FieldFormat>List</FieldFormat>
    <DefaultValue>IT</DefaultValue>
    <Values>
      <Item ref="Accounting" id="0">Accounting</Item>
      <Item ref="Accounts Payable" id="0">Accounts Payable</Item>
      <Item ref="Facilities" id="0">Facilities</Item>
      <Item ref="HR" id="0">HR</Item>
      <Item ref="IT" id="0">IT</Item>
      <Item ref="Other" id="0">Other</Item>
      <Item ref="Payroll" id="0">Payroll</Item>
      <Item ref="Sales" id="0">Sales</Item>
      <Item ref="Telecom" id="0">Telecom</Item>
    </Values>
  </Field>
</CustomFields>
<AccessRights xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">
  <ViewHiddenNotes>true</ViewHiddenNotes>
  <ChangeHiddenNotes>true</ChangeHiddenNotes>
  <FieldRights>
```

```

<FieldRight>
  <FieldName>ID</FieldName>
  <AccessType>Required</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>Summary</FieldName>
  <AccessType>Required</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>Description</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>CreationDtTm</FieldName>
  <AccessType>ViewOnly</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>SubmitterName</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>SubmitterEmailAddr</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>ContactPhone</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>OrgName</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>OrgID</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>StaffID</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>ContactEmail</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>MachineID</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>Note</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>ClosedDtTm</FieldName>
  <AccessType>ViewOnly</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>PromiseDtTm</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>DueDtTm</FieldName>
  <AccessType>ViewOnly</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>ActualCompletedDate</FieldName>
  <AccessType>ViewOnly</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>HiddenNote</FieldName>
  <AccessType>Edit</AccessType>

```

KSD API Web Service

```
</FieldRight>
<FieldRight>
  <FieldName>Owner</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>LockUser</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>EditDtTm</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>current_esc_datetime</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>current_goal_datetime</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>lockTime</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>sourceType</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>Status</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>Priority</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>Severity</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>Category</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>SubCategory</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>Stage</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>Resolution</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>Assignee</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>Source</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>Urgency</FieldName>
  <AccessType>Edit</AccessType>
</FieldRight>
<FieldRight>
  <FieldName>KB_Article</FieldName>
```

```

        <AccessType>Edit</AccessType>
      </FieldRight>
    </FieldRights>
  </AccessRights>
  <NoteTemplates xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">
    <Item ref="My Note" id="196429316815241">My Note</Item>
    <Item ref="Note 2" id="167218821431219">Second note</Item>
  </NoteTemplates>
  <ChangeProcedure
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Standard is
Changed</ChangeProcedure>
  <GoalProcedure time="1" unit="DAY"
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Standard Goal - All
Stages</GoalProcedure>
</ServiceDeskDefinitionResponse>
<Method>GetServiceDesk</Method>
<TransactionID>146</TransactionID>
<ErrorMessage/>
<ErrorLocation/>
</GetServiceDeskResult>
</GetServiceDeskResponse>

```

GetIncidentList Request

```

<GetIncidentList xmlns="vsaServiceDeskWS">
  <req>
    <IncidentListRequest>
      <ServiceDeskName
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Standard</ServiceDeskName
>
      <IncidentCount
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">30</IncidentCount>
    </IncidentListRequest>
    <SessionID>62648424383576321292545755</SessionID>
  </req>
</GetIncidentList>

```

GetIncidentList Response

```

<GetIncidentListResponse xmlns="vsaServiceDeskWS">
  <GetIncidentListResult>
    <IncidentList>
      <Incident xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">
        <ServiceDeskName>Standard</ServiceDeskName>
        <IncidentNumber>STD000001</IncidentNumber>
        <Summary>Getting Started with Service Desk - PLEASE READ!</Summary>
        <Status>Closed</Status>
        <Priority>Low</Priority>
        <Stage>Closed</Stage>
        <Category>Advice & Guidance</Category>
        <CreateDateTime>2010-02-05T17:07:21.55-08:00</CreateDateTime>
        <LastEditDateTime>2010-02-05T22:59:22.64-08:00</LastEditDateTime>
        <Submitter>Kaseya Support</Submitter>
        <SubmitterEmail>noreply@kaseya.com</SubmitterEmail>
      </Incident>
    </IncidentList>
    <Method>GetIncidentList</Method>
    <TransactionID>147</TransactionID>
    <ErrorMessage/>
    <ErrorLocation/>
  </GetIncidentListResult>
</GetIncidentListResponse>

```

GetIncident Request

```
<GetIncident xmlns="vsaServiceDeskWS">
  <req>
    <IncidentRequest>
      <IncidentNumber
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">STD000001</IncidentNumber
>
      <IncludeNotes
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">true</IncludeNotes>
      <IncludeDefinition
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">true</IncludeDefinition>
    </IncidentRequest>
    <SessionID>67223225114316912673490269</SessionID>
  </req>
</GetIncident>
```

GetIncident Response

```
<GetIncidentResponse xmlns="vsaServiceDeskWS">
  <GetIncidentResult>
    <IncidentResponse id="611922114996841">
      <IncidentNumber
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">STD000001</IncidentNumber
>
      <Summary xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Getting
Started with Service Desk - PLEASE READ!</Summary>
      <Description xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">
        &lt;p&gt;&lt;strong&gt;&lt;span
style='font-size:11.0pt;font-family:"Calibri","sans-serif";color:blue'&gt;WELCOME TO SERVICE
DESK&lt;/span&gt;&lt;/strong&gt;&lt;br&gt;
        Your Service Desk module has been pre-configured with a template-driven Standard service desk,
and a Knowledge Base desk. Only a few short customization steps are required to use these desks
immediately. See &lt;a
href="http://help.kaseya.com/WebHelp/EN/KSD/1000000/index.htm?toc.htm?5982.htm"&gt;Getting
Started&lt;/a&gt; to quickstart your implementation of Service Desk.
        &lt;/p&gt;
      </Description>
      <Status
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Standard||Closed</Status>
      <Priority
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Standard||Low</Priority>
      <Stage
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Standard||Closed</Stage>
      <Category
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Standard||Advice&amp;Guid
ance</Category>
      <CreateDateTime
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">2010-02-05T17:07:21.55-08
:00</CreateDateTime>
      <LastEditDateTime
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">2010-02-05T22:59:22.64-08
:00</LastEditDateTime>
      <Submitter xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Kaseya
Support</Submitter>
      <SubmitterEmail
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">noreply@kaseya.com</Submi
tterEmail>
      <SubmitterType
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">UNKNOWN</SubmitterType>
      <IsUnread
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">true</IsUnread>
      <IsParticipant
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">>false</IsParticipant>
      <Owner
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">garyw</Owner>
      <AssigneeType
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">POOL</AssigneeType>
      <Assignee
```



```

xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Tier1Support</Assignee>
  <ActualCompletionDate
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">2010-02-05T22:59:29.28-08
:00</ActualCompletionDate>
  <ExpectedCompletionDate
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">2010-02-06T17:07:22.283-0
8:00</ExpectedCompletionDate>
  <IsArchived
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">>false</IsArchived>
  <IsError
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">>false</IsError>
  <Notify
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">>false</Notify>
  <SourceType
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">ServiceDesk</SourceType>
  <CustomFields xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">
    <Field fieldName="Source">Text</Field>
    <Field fieldName="Urgency">Low</Field>
    <Field fieldName="KB_Article">No</Field>
    <Field fieldName="Dept">Sales</Field>
  </CustomFields>
  <Notes xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">
    <Note id="213494962391116">
      <Timestamp>2010-02-05T22:59:25.127-08:00</Timestamp>
      <Text>Auto Generated Note:&lt;br/&gt;
Ticket Changed&lt;br/&gt; 'currentStageGoalDateTime' cleared&lt;br/&gt;</Text>
      <Hidden>true</Hidden>
    </Note>
    <Note id="356934215185622">
      <User>garyw</User>
      <Timestamp>2010-02-05T17:07:21.55-08:00</Timestamp>
      <Text>Auto Generated Note:&lt;br/&gt;
Ticket Added&lt;br/&gt;</Text>
      <Hidden>true</Hidden>
    </Note>
  </Notes>
</IncidentResponse>
<Method>GetIncident</Method>
<TransactionID>200</TransactionID>
<ErrorMessage/>
<ErrorLocation/>
</GetIncidentResult>
</GetIncidentResponse>

```

AddIncident Request

```

<AddIncident xmlns="vsaServiceDeskWS">
  <req>
    <AddSDIncident>
      <ServiceDeskName
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Standard</ServiceDeskName
>
      <Summary xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Test Ticket
From Web Service</Summary>
      <Description xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">This
ticket was created with the web service.</Description>
      <Status
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Standard||New</Status>
      <Priority
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Standard||Medium</Priorit
y>
      <Category
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Standard||Network</Catego
ry>
      <SubCategory
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Standard||Network||Connec
tivity</SubCategory>
    </AddSDIncident>
    <SessionID>67223225114316912673490269</SessionID>
  </req>

```

```
</AddIncident>
```

AddIncident Response

```
<AddIncidentResponse xmlns="vsaServiceDeskWS">
  <AddIncidentResult>
    <AddSDIncidentResponse>
      <IncidentNumber
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">STD000002</IncidentNumber
>
      <IncidentID
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">249259141859248</Incident
ID>
    </AddSDIncidentResponse>
    <Method>AddIncident</Method>
    <TransactionID>203</TransactionID>
    <ErrorMessage/>
    <ErrorLocation/>
  </AddIncidentResult>
</AddIncidentResponse>
```

UpdateIncident Request

```
<UpdateIncident xmlns="vsaServiceDeskWS">
  <req>
    <UpdateSDIncident id="249259141859248">
      <ServiceDeskName
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Standard</ServiceDeskName
>
      <IncidentNumber
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">STD000002</IncidentNumber
>
      <Summary xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Test Ticket
From Web Service</Summary>
      <Description xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">This
ticket was created with the web service.</Description>
      <Status
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Standard||InProgress</Sta
tus>
      <Priority
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Standard||Low</Priority>
      <Stage
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Standard||Identified</Sta
ge>
      <Category
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Standard||Printer</Catego
ry>
      <SubCategory
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Standard||Printer||Printe
rProblem</SubCategory>
      <CreateDateTime
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">2010-03-10T21:07:31.923-0
8:00</CreateDateTime>
      <LastEditDateTime
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">2010-03-10T21:07:31.923-0
8:00</LastEditDateTime>
      <Submitter
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">garyw</Submitter>
      <SubmitterType
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">UNKNOWN</SubmitterType>
      <IsUnread
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">true</IsUnread>
      <IsParticipant
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">false</IsParticipant>
      <CurrentStageEscalationDateTime
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">2010-03-10T21:22:43.063-0
8:00</CurrentStageEscalationDateTime>
      <CurrentGoalDateTime
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">2010-03-10T22:07:43.077-0
```

```

8:00</CurrentGoalDateTime>
  <Owner
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">garyw</Owner>
  <AssigneeType
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">POOL</AssigneeType>
  <Assignee
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">Tier1Support</Assignee>
  <ExpectedCompletionDate
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">2010-03-11T21:07:43.077-0
8:00</ExpectedCompletionDate>
  <IsArchived
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">>false</IsArchived>
  <IsError
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">>false</IsError>
  <Notify
xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">>false</Notify>
  <Notes xmlns="http://www.kaseya.com/vsa/2007/12/ServiceDeskDefinition.xsd">
    <Note id="281273717819319">
      <User>garyw</User>
      <Timestamp>2010-03-10T21:07:31.923-08:00</Timestamp>
      <Text>Auto Generated Note:&lt;br/&gt;
Ticket Added&lt;br/&gt;</Text>
      <Hidden>true</Hidden>
    </Note>
  </Notes>
</UpdateSDIncident>
</req>
</UpdateIncident>

```

UpdateIncident Response

```

<UpdateIncidentResponse xmlns="vsaServiceDeskWS">
  <UpdateIncidentResult>
    <Method>UpdateIncident</Method>
    <TransactionID>205</TransactionID>
    <ErrorMessage/>
    <ErrorLocation/>
  </UpdateIncidentResult>
</UpdateIncidentResponse>

```


Glossary of Terms

Default Field Permissions

Portal Access users (machine users) (page 13) use ticket field level permissions defined for the Default machine role. The Default machine role also applies to VSA users using a user role that does not include either the Service Desk Administrator or Service Desk Technician roletype. When a VSA user is using the Default machine role to view or edit a ticket, a Default Permissions Apply message displays at the top of a service desk ticket. If even the Default machine role does not provide access to a ticket, then an error message tells the user their role does not permit access to the ticket.

Desk Definition Templates

To help you get started quickly, new desk definitions are created in Service Desk by copying them from one of several **desk definition templates**, each configured to support a typical business process. The template you select determines whether *tickets* or *KB articles* are created, based on the desk definition.

- **Blank KnowledgeBase** - Creates a blank knowledge base desk definition that contains no pre-defined values for any standard fields.
- **Blank Ticket** - Creates a blank desk definition that contains no pre-defined values for any standard fields.
- **ITIL ChangeRequests** - A change request desk, based on ITIL guidelines, used to track detailed requirements for changes or enhancements to a product or service, usually in response to a problem. The *ChangeRequest* (page 49) service desk is created from this template.
- **ITIL Incident** - An advanced service desk, based on ITIL guidelines. The *Incidents* (page 46) service desk is created from this template. Integrates with pre-defined sample user roles, user pools, organization types, procedure variables, message templates, policies, coverage schedules, and holidays. Additional configuration is required to use this service desk.
- **ITIL KnowledgeBase** - A knowledge base desk based on ITIL guidelines. The *Knowledge Base* (page 50) desk is created from this template. Serves as a repository of known errors and recommended solutions.
- **ITIL Problem** - A service desk, based on ITIL guidelines, used to track broadly-based product or service problems separately from immediate customer support issues. The *Problem* (page 48) service desk is created from this template.
- **Service_Desk_Standard** - Provides basic automation with a simplified workflow. The *Customer_SD_Automation* (page 45) service desk is created from this template. Minimal configuration is required to use this service desk.

Editing Template

An **editing template** serves three purposes:

1. The editing template defines the layout of the dialog used to edit a ticket or KB article.
2. An editing template may *mask* selected fields, even though the fields are defined by the desk definition. *Using an editing template to mask a field overrides whatever field permission is set for that field.*
3. The editing templates also sets default **field permissions** (page 120) for editing a ticket or KB article. Whether assigned by role or by user, you can override the default field permissions set by the editing template to suit your business requirements.

An editing template is applied to a combination of desk definition and user role (or machine role) using **Role Preferences** (page 57) or the Desk Definition > Access > **Roles** (page 43) tab. An editing template can also be applied to a combination of desk definition and user using **User Preferences** (page 60).

Glossary of Terms

User Preferences has precedence over Role Preferences. The default editing template for all roles and all users working with a service desk is specified in the Service Desk > Desk Definition > New or Edit > **General Info** (page 37) tab.

Field Permissions

Field permissions are set by role. For VSA users using roles linked to the `Service Desk Technicians` role type, **field permissions** determine what fields a user can view or edit within the ticket editor or KB article editor. Typical field permissions include: Editable, View Only, Hidden, or Required. Default field permissions are set by **editing template** (page 119).

Note: VSA users using a role linked to the `Service Desk Administrators` role type can see and work with any field in any ticket editor or KB article editor. Master role users also always have complete field permission access, regardless of roletype assignment.

Machine Group

Machines are always defined by **machine group** and machine groups are always defined by organization. You can define multi-level hierarchies of machine groups by identifying a parent machine group for a machine group. You can also move a machine group and all of its associated machines to a different parent machine group within the same organization.

Managed Machine

A monitored machine with an installed agent and active machine ID / group ID account on the Kaseya Server. Each managed machine uses up one agent license.

myOrg

myOrg is the **organization** (page 120) of the service provider using the VSA. All other organizations in the VSA are second party organizations doing business with myOrg. The default name of myOrg, called `My Organization`, should be renamed to match the service provider's company or organization name. *This name displays at the top of various reports to brand the report.* Agents installed to internally managed machines can be assigned to this organization. VSA user logons are typically associated with staff records in the myOrg organization. myOrg cannot be assigned a parent organization.

On Premises

An **on premises** hardware/software installation of the VSA is maintained by a service provider and typically used only by the service provider. See **Software as a Service (SaaS)** (page 121).

Org

The VSA supports three different kinds of business relationships:

- **Organizations** - Supports machine groups and manages machines using agents.
- **Customers** - Supports the billing of customers using **Service Billing**.
- **Vendors** - Supports the procurement of materials using **Service Billing**.

The `Org` table is a support table shared by *organizations*, *customers* and *vendors*. Each record in the `Org` table is identified by a unique `orgID`. The `Org` table contains basic information you'd generally need to maintain about any kind of business relationship: mailing address, primary phone number, duns number, yearly revenue, etc. Because the `Org` table is shared, you can easily convert:

- A customer into an organization or vendor.
- A vendor into an organization or customer.
- An organization into a customer or vendor.

Note: `myOrg` (page 120) is the organization of the service provider using the VSA.

Pools

Users can be assigned to **pools** of users, regardless of the roles they belong to. Tickets can be assigned to pools using the **Assigned To** field in the editor, or by procedure using the `Assign Ticket Property > Pool` command. When a user in that pool opens the ticket, the ticket is automatically *reassigned* to the individual user.

Resource Type

A **resource type** specifies a *skill*, *material* or *cost* and sets a default rate for a billable labor item or entry. Typically a resource type represents a skill performed by a staff member. A billing rate and standard cost is defined for each *skill* required to perform the service. The rate can be overridden when selected. Because the labor performed to deliver a service sometimes requires incidental charges for materials and costs, resource types can also be classified as either *material* or *cost*. For example, extra cabling or overnight shipping might be included as additional, billable labor entries, because they are required to deliver the service of installing a server. The classification of resource types typically reflects the production requirements of a company. Labor entries are classified by both resource type and by activity type.

Resource Type - Cost

A *cost* resource type for labor line item has a predefined cost and billing rate—which can be overridden—while a *expense* line item only specifies the name of the expense and the total amount billed.

Software as a Service (SaaS)

Kaseya provides "software as a service" (SaaS) deployment of **Virtual System Administrator™**. Service providers contract with Kaseya to access a VSA hosted and maintained by Kaseya and can install a specified number of their customer agents. Service providers are allocated a unique *tenant partition* of a shared Kaseya Server and database. Within their assigned partition, service providers can only see their own organizations, machine groups, procedures, reports and tickets. Service providers in a tenant partition have full access to all the functions of the VSA except system maintenance, which is the responsibility of Kaseya. See **On Premises** (page 120).

Stop Notification and Email Send Delay

Pending email notification of selected tickets can be stopped using **Stop Notification** in **Tickets** (page 19). This option is used in conjunction with **Email Send Delay** in **Role Preferences** (page 57) and **User Preferences** (page 60). For example, if **Email Send Delay** is set to 5 minutes for the role you are using, then you have 5 minutes to cancel any emails that are pending for a ticket using **Stop Notification**. Applies to ticket rows displaying a  icon in the icon column of the ticket table. **Stop Notification** only stops currently pending email.

Task

Tasks organize a **Service Desk** ticket into a series of steps. Each task can be assigned a different assignee and tracked individually for completion. You can add notes and hours worked by individual task. All tasks for all tickets can be listed, sorted, filtered, searched and viewed using the **Tasks Associated with Tickets** (page 32) page.

Ticket

A **ticket** tracks the detection, reporting, and resolution of an issue. Every communication and action taken on behalf of the issue can be recorded in the ticket record.

Glossary of Terms

Ticket Requests

Ticket requests are created from either inbound emails or system events, such as alarm conditions. **Incoming Email and Alarm Settings** (page 61) and linked service desk procedures determine how ticket requests are processed into tickets, what service desks are used to create the tickets, and whether ticket requests are canceled.

Work Order

A **work order** specifies the delivery of a non-recurring service (billable item). A work order lets you estimate and review costs *before you create billable entries*. Work orders can be converted from a sales order, but a sales order is not required. The four types of billable items you can include on a work order are *labor, parts, expenses* or *general*.

Work Types

Work types determine how time entries are integrated with other functions in the VSA. The work type options displayed in your VSA depend on the modules installed.

- **Admin Tasks** - A recurring operational activity not associated with any project.
- **Work Orders** - Only displays if the **Service Billing** is installed.
- **Service Desk Tickets** - Only displays if **Service Desk** 1.3 or later is installed.

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