Kaseya

Ticketing

User Guide

Version R95

English

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Ticketing Overview

The Ticketing module manages service requests. These service requests, and your response to them, are documented using tickets.

The ticketing system automatically notifies designated VSA users and ticket submitters by email for such system events as ticket creation, changes, or resolutions. The system organizes tickets by machine ID, group ID, organization ID, department ID or staff ID. You may wish to create a "generic" organization in System > Manage to hold tickets of a global nature, such as general network problems.

Visibility of Tickets in Other Modules

Tickets can also be viewed using Live Connect (Classic) and in Info Center > View Dashboard.

Functions	Description
View Summary *(page ii)*	Lists all tickets. Each row displays summary data for a single ticket.
Create/View *(page iv)*	Create new tickets, or add or modify notes in existing tickets.
Delete/Archive *(page vii)*	Permanently delete tickets or move tickets into archival storage.
Migrate Tickets *(page ix)*	Migrate Ticketing tickets to and from **Service Desk** tickets.
Notify Policy *(page ix)*	Determine when email notifications are sent out by the Ticketing module.
Access Policy *(page xi)*	Determine who can edit and/or display fields in tickets.
Assignee Policy *(page xii)*	Create policies to automatically assign users to a new or existing ticket.
Due Date Policy *(page xii)*	Define default due dates for new tickets based on field values and email subject lines.
Edit Fields *(page xiv)*	Define, modify, or create ticket fields used to classify tickets.
Email Reader *(page xv)*	Setup automatic polling of a POP3 email server to generate new ticket entries.
Email Mapping *(page xvii)*	Define default field values for new tickets received using the Email Reader.

Manage Tickets

View Summary

Ticketing > Manage Tickets > View Summary
- Similar information is provided using Info Center > Reporting > Reports > Ticketing.

The **View Summary** page lists all tickets. Each row displays summary data for a single ticket.

New Tickets or New Notes

New tickets, or new notes in existing tickets, are clearly highlighted in one of two ways.

- **By Date** - Tickets with new notes entered in the last 1 day are highlighted in red. New notes entered in the last 7 days are highlighted in yellow. You can adjust these times and colors by clicking the **Change Highlight** link.
- **Read Flag** - Each ticket is flagged to indicate if the user has viewed all the notes in the ticket. Once viewed, the ticket is marked as read using the 🗒 icon. If another user or user adds or modifies a note, the flag is switched back to unread for you, showing the 🗒 icon.

Filtering

The list of tickets displayed depends on several factors:

- The list of machines displayed depends on the machine ID / group ID filter and the user's scope.
- You can further *sort* and *filter* listed tickets by selecting values in the field drop-down lists.
- **Search** does not display any tickets if notes contain none of the words being searched for.
- Machine users only have access to tickets for their own machine ID using Portal Access.

Assignees

The assignee list displayed in **View Summary** *(page ii)* and **Create/View** *(page iv)* is based on the scope of the currently logged on user. Ticketing assignment in the **Ticketing** module always allows you to see master users, regardless of your role or scope.

Open Tickets, Past Due, Closed Tickets, Total Tickets

Shows the number of tickets open, past due, closed, and total for all tickets matching the filtering criteria described above.

Search

Search restricts the list of tickets to only tickets containing **any** of the words or phrases in the search string. Enclose a phrase in double-quotes ("). Search examines the ticket **Summary** line, submitter **Name**, submitter **Email**, submitter **Phone**, or any of the **Notes**.

> Note: Using an asterisk (*) in the search field only finds tickets that include an asterisk.

Clicking any of the ticket **Summary** links in the paging area displays the details of that ticket using the **View Ticket** *(page iv)* page. Words in the ticket notes matching any **Search** word are *highlighted with a green background.*

<last 10 searches>

The drop-down list below the **Search** edit box lists the `<last 10 searches>` you have made. Selecting any item from the list automatically re-searches for those words.

Sort

Click either **ascending** or **descending** to order tickets by the selected column.

Fields...

Allows each user to organize the columns displayed in the table. Clicking **Fields...** opens a dialog in a new browser window. There, you can select which columns to show or hide and also the order in which columns are displayed. You can show/hide any of the following columns:

- **ID** - Unique ID number automatically assigned to each ticket.
- **Machine ID** - The ticket applied to this machine.
- **Assignee** - Name of the user responsible for solving this problem.
- **Category** - Type of problem this ticket discusses.
- **Status** - Open, Hold, Closed
- **Priority** - High, Normal, Low
- **SLA Type** - Service Level Agreement type
- **Dispatch Tech** - Yes, No
- **Approval** - Required, Not Required
- **Hours Worked** - Hours worked, in decimal format.
- **Last Modified Date** - Last time any note was added to this ticket.
- **Creation Date** - Time when the ticket was first entered.
- **Due Date** - Ticket due date.
- **Resolution Date** - Date the ticket was closed.
- **Submitter Name** - Person who submitted this ticket: user, user name, or machine ID.
- **Submitter Email** - The submitter email address.
- **Submitter Phone** - The submitter phone number.

You can also select additional custom fields you have previously created using Ticketing > **Edit Fields** *(page xiv)*.

Automatically submit on field changes / Submit

If **Automatically submit on field changes** is checked, then the **View Summary** page redisplays as soon as a single field in the **List Fields Filter** is changed. If blank, then you can change several of the **List Fields Filter** at one time. The **View Summary** page won't redisplay until you click **Submit**.

(List Fields Filter)

Each field of type `List`—such as **Category**, **Status**, or **Priority**—are shown as selectable drop-down lists. Selecting values from one or more of these drop-down lists filters the paging area to display only those tickets matching the selected values. Custom `List` fields are created using Ticketing > **Edit Fields** *(page xiv)*.

Mark All Read

Click to mark all tickets as read. Read tickets display a 🗐 icon. Any changes or note additions inserted by other users reset the ticket to unread. Unread tickets display a 🗒 icon.

Set Field...

Use **Set Field...** to change multiple field values on multiple tickets at once. Check the box for all the tickets you wish to change a field value for. Then click **Set Field...** A dialog box displays that enables you to set a new value for any of the fields.

Select Page

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 and click ◀◀ and ▶▶ buttons to go to the last page. The drop-down list alphabetically lists the first record of each page of data.

Merge...

To merge tickets, *check the box for any two tickets* listed, then click the **Merge...** button. The resulting merged ticket contains all the notes and attachments from both tickets. You are asked which field values you wish to use in the ticket for all field values that are different between the two tickets.

Change Highlight

Click **Change Highlight** to set and/or modify row highlighting based on date. Highlight tickets in two ways. Tickets with a date within 1 day of the current time are highlighted in red. Tickets with a date within 7 days are highlighted in yellow. You can independently *adjust both the number of days and the highlight color*. To disable highlighting by date, set each number of days to zero. The highlight date may be **last modified date**, **due date**, or **creation date**.

Select All/Unselect All

Click the **Select All** link to check all rows on the page. Click the **Unselect All** link to uncheck all rows on the page.

Column Headings

Clicking any column heading re-orders the table using that column as the sort criteria.

Data Table

Each row of the table lists summary data for a single ticket.

- To display the details of the 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.
- To display the details of the ticket in the *same window* click the **summary** line link.
- To toggle the state to *read* click 🟨.
- To toggle the state to *unread* click 📄.

Create/View

`Ticketing > Manage Tickets > Create/View`

The **Create/View** page creates new tickets, or adds or modify notes in existing tickets.

Adding a New Ticket

1. Bypass the **Ticket ID** field. It will be populated with a new unique number when the ticket is created.
2. Click **Select association** to associate the ticket with one of six types of VSA records: asset, machine ID, machine group, organization, department, or staff. This is mandatory.
3. Enter a short description of the problem in the **Summary** field.
4. The **Submitter** fields are populated as follows:
    - ➢ If a machine ID was selected in step 2, the submitter **User Name**, **User Email** and **User Phone** fields are populated with contact data maintained for this machine ID using Agent > Edit Profile. This information can be updated if need be.
    - ➢ If anything other than machine ID was selected in step 2, these submitter fields can be filled in manually, if applicable.
    - ➢ If a ticket was created by an incoming email using Ticketing > **Email Reader** *(page xv)*, the **Submitter Email** field is populated with the sender's email address.
5. The **Date Created** is automatically assigned.

6. The **Age / Closed** date is automatically assigned. **Age** lists the number of hours/days since the creation date for non-closed   tickets. If the ticket has been closed then **Age** is replaced with **Closed** and displays the date and time this ticket was closed.

7. The default due date for a ticket is determined by the Ticketing > **Due Date Policy** *(page xii)*. The due date is based on the ticket attributes you enter when a *new* ticket is entered. If a due date policy is in force for a ticket, then a policy icon displays next to the due date. You can override the existing due date by clicking the edit icon next to the due date. The policy icon is replaced by a manual override icon next to the due date. Click the **Apply** button to reset the due date to the policy enforced due date. If the due date does not match any of the defined **due date policies** *(page xii)*, then the Due Date label is highlighted. If no due date policies are defined then the system default due date is used, which is one week from the creation date of the ticket. When a ticket is overdue, the due date displays in bolded dark red text, both in the **View Summary** *(page ii)* page and in Ticketing reports. It also displays in red text in the header of the **Create/View** *(page iv)* page. You can optionally send an email for overdue tickets using Ticketing > **Notify Policy** *(page ix)*. A ticket is resolved when its status is set to closed and the resolution date is recorded.

8. Classify the ticket using the built-in `List` type fields, such as **Assignee**, **Category**, **Status**, and **Priority**. You can also classify the ticket using additional `List` type fields that have been created for tickets using Ticketing > **Edit Fields** *(page xiv)*.

9. Enter details of the problem in the **Notes** edit box. Click the **Note Size** link to change the number of rows available for your note text.

10. To attach a file, such as a screen shot, to the ticket, click **Browse...** below the note entry area. Locate the file you wish to attach on your local computer. Click **Open** in the browse window to upload the file to the VSA server. Once the file has been successfully uploaded, tag text is automatically entered into the note in this format: `<attached file:filename.ext>`. This tag appears as a hyperlink in a note for the ticket. Display/download the file at any time by clicking that link.

> **Note:** The following list of filename extensions display as images or text in the note, instead of displaying as a hyperlinked filename: gif, jpg, png, bmp, txt, sql.

> **Note:** Ticket note attachments are typically located in the `C:\Kaseya\WebPages\ManagedFiles` directory.

11. Check the **Suppress email notification** checkbox if you don't want email recipients, either VSA users or machine users, to be notified about the ticket. In most cases you'll want to leave this blank.

12. Check the **Suppress automatic note creation checkbox** if you don't want a note to be added automatically. This option is hidden by default. Use **Access Policy** *(page xi)* to display it.

13. Complete the creation of the ticket in one of two ways:
    ➢ Click **Submit** to complete the creation of the ticket and to notify *both* VSA users and machine users by email.
    ➢ Click **New Hidden** to complete the creation of the ticket to notify *only VSA* users by email. Use hidden notes to record data or analysis that may be too detailed or confusing to machine users but useful to other VSA users.

    > **Note:** Hidden notes are *never* included in email notifications.

Editing an Existing Ticket

To display an existing ticket, enter a ticket number in the **Ticket ID** field.

▪ If you don't know the number of the ticket, use **View Summary** *(page ii)* or **Delete/Archive** *(page vii)* to locate and select the ticket. The ticket will be displayed using this page.

▪ When an existing ticket first displays on this page, the header fields show the most recent settings for the ticket.

- Making changes to any of the `List` type fields immediately creates a new note for the ticket, identifying the change.
- Making changes to any of the non-`List` type fields—such as the **Summary** field, **Submitter** information, or fields that accept freeform text entries or numbers—requires you to click **Update** afterwards to create a new note.
- Edit any *previous* note for a ticket by clicking the edit icon 🗒 next to the note you wish to edit. This populates the header fields with the settings for this note. It also highlights the row of the note being edited in light yellow. You can change the contents of the note, including the timestamp for the note. Click **Change** to confirm the changes you have made.
- Delete notes by clicking the delete ✖ icon next to the note.
- Split a ticket into two tickets by clicking the split ✉ icon next to the note. The new ticket contains the note and all more recent notes. The original ticket can either be closed or left unchanged.

> **Note:** View, edit and delete privileges for tickets and fields are controlled using Ticketing > **Access Policy** *(page xi)*. VSA users and machine users are notified about ticket changes based on Ticketing > **Notify Policy** *(page ix)*. Change the number automatically assigned to the next new ticket using **Edit Fields** *(page xiv)*.

Assignees

The assignee list displayed   in **View Summary** *(page ii)* and **Create/View** *(page iv)* is based on the scope of the currently logged on user. Ticketing assignment in the **Ticketing** module always allows you to see master users, regardless of your role or scope.

Assignee Policy Icon

By default a `always enforce assignee policy` icon 🔄 displays next to the assignee field. This indicates that assignee names are automatically selected using **Assignee Policy** *(page xii)*. Click the 🔄 icon once to display the `override the assignee policy` icon 📍. This overrides the assignee policy and allows you to select an assignee manually.

> **Note:** If no assignee policy is defined for the combination of `List` type fields values selected, then toggling between the 🔄 and 📍 icons has no effect.

Displaying the "Create/View" Page Using a URL

The following URL displays the **Create/View** *(page iv)* web page for a specific ticket ID

`http://.../vsaPres/Web20/core/KHome.aspx?ticid=<TicketID>`

For example:

`http://demo.kaseya.com/vsaPres/Web20/core/KHome.aspx?ticid=1234`

Time/Admin

Lists the time a change was made to a ticket and the user or user who made the change.

Note

Lists all notes relating to this ticket in ascending or descending time order. Each note is time stamped and labeled with the logon name of the person entering the note.

> **Note:** User entered notes are labeled with the machine ID they logged in with. See Portal Access for details.

Hide

If checked, the note is hidden from VSA users but not machine users. The default setting is determined by the **as hidden note** checkbox in Ticketing > **Access Policy** *(page xi)*. Access policies are applied by user role. If you belong to more than one user role, the most restrictive policy has precedence.

Delete/Archive

The **Delete/Archive** page deletes old tickets, or deletes tickets in a particular category or status. You may reach the point where your system has so many old tickets that they are cluttering up searches with obsolete data.

> **Note:** View, edit and delete privileges for tickets and fields are controlled using Ticketing > **Access Policy** *(page xi)*.

Archiving Tickets

In addition to delete, you can also **archive** tickets. Archived tickets stay in the database but are moved to separate tables. Use archive to move obsolete or old tickets out of the active database **without** deleting them from the system. You can always move tickets back and forth between the active database table and the archive database table.

Filtering

The list of tickets displayed depends on several factors:

- The list of machines displayed depends on the machine ID / group ID filter and the user's scope.
- You can further *sort* and *filter* listed tickets by selecting values in the field drop-down lists.
- **Search** does not display any tickets if notes contain none of the words being searched for.
- Machine users only have access to tickets for their own machine ID using Portal Access.
- Use the **Hide tickets last modified after** control to only display tickets *earlier* than a certain date.

Archiving Closed Tickets

If, for example, you want to archive `Closed` tickets older than 6 months perform the following steps:

1. Select `Closed` from the **Status** control.
2. Set the **Hide tickets last modified after** control to list only tickets last modified 6 months ago or earlier.
3. Click the **Set** button.
4. Click the **Select All** link.
5. Click the **Archive...** button.
6. Check the **Display archived tickets instead of active tickets** checkbox to search and examine the archived tickets. You can move tickets back to the active table here using the **Restore...** button.

Open Tickets, Past Due, Closed Tickets, Total Tickets

Shows the number of tickets open, past due, closed, and total for all tickets matching the filtering criteria described above.

Search

Search restricts the list of tickets to only tickets containing **any** of the words or phrases in the search string. Enclose a phrase in double-quotes ("). Search examines the ticket **Summary** line, submitter **Name**, submitter **Email**, submitter **Phone**, or any of the **Notes**.

> **Note:** Using an asterisk (*) in the search field only finds tickets that include an asterisk.

Clicking any of the ticket **Summary** links in the paging area displays the details of that ticket using the **View Ticket** *(page iv)* page. Words in the ticket notes matching any **Search** word are *highlighted with a green background.*

<last 10 searches>

The drop-down list below the **Search** edit box lists the `<last 10 searches>` you have made. Selecting any item from the list automatically re-searches for those words.

Sort

Click either **ascending** or **descending** to order tickets by the selected column.

Fields...

Allows each user to organize the columns displayed in the table. Clicking **Fields...** opens a dialog in a new browser window. There, you can select which columns to show or hide and also the order in which columns are displayed. You can show/hide any of the following columns:

- **ID** - Unique ID number automatically assigned to each ticket.
- **Machine ID** - The ticket applied to this machine.
- **Assignee** - Name of the user responsible for solving this problem.
- **Category** - Type of problem this ticket discusses.
- **Status** - Open, Hold, Closed
- **Priority** - High, Normal, Low
- **SLA Type** - Service Level Agreement type
- **Dispatch Tech** - Yes, No
- **Approval** - Required, Not Required
- **Hours Worked** - Hours worked, in decimal format.
- **Last Modified Date** - Last time any note was added to this ticket.
- **Creation Date** - Time when the ticket was first entered.
- **Due Date** - Ticket due date.
- **Resolution Date** - Date the ticket was closed.
- **Submitter Name** - Person who submitted this ticket: user, user name, or machine ID.
- **Submitter Email** - The submitter email address.
- **Submitter Phone** - The submitter phone number.

You can also select additional custom fields you have previously created using Ticketing > **Edit Fields** *(page xiv)*.

Automatically submit on field changes / Submit

If **Automatically submit on field changes** is checked, then the **View Summary** page redisplays as soon as a single field in the **List Fields Filter** is changed. If blank, then you can change several of the **List Fields Filter** at one time. The **View Summary** page won't redisplay until you click **Submit**.

(List Fields Filter)

Each field of type `List`—such as **Category**, **Status**, or **Priority**—are shown as selectable drop-down lists. Selecting values from one or more of these drop-down lists filters the paging area to display only those tickets matching the selected values. Custom `List` fields are created using Ticketing > **Edit Fields** *(page xiv)*.

Hide tickets last modified after / Set

Set the date and time of this control to only display tickets *earlier* than a certain date.

Select All/Unselect All

Click the **Select All** link to check all rows on the page. Click the **Unselect All** link to uncheck all rows on the page.

Select Page

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 and click [◀◀] and [▶▶] buttons to go to the
last page. The drop-down list alphabetically lists the first record of each page of data.

Delete...

Select one or more tickets and click the Delete... button to permanently delete the tickets from the
system. Deleted tickets cannot be restored.

Archive...

Select one or more tickets and click the Archive... button. Archived tickets stay in the database but are
moved to separate tables. Use archive to move obsolete or old tickets out of the active database
without deleting them from the system. You can always move tickets back and forth between the active
database table and the archive database table.

Display archived tickets instead of active tickets / Restore

Check the Display archived tickets instead of active tickets checkbox to search and examine the archived
tickets. You can move tickets back to the active table here using the Restore... button.

Migrate Tickets

Ticketing > Manage Tickets > Migrate Tickets

The Migrate Tickets page performs two tasks:
- Migrates selected Ticketing tickets into **Service Desk** tickets.
- Imports **Service Desk** ticket XMLs into Ticketing tickets.

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 ii)* 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
   the Export button in Service Desk > Tickets.
2. Click Import in Ticketing > Migrate Tickets and select the XML file you created in step 1 above.

Configure Ticketing

Notify Policy

Ticketing > Configure Ticketing > Notify Policy

The Notify Policy page determines when email notifications are sent out by the Ticketing module.
Multiple policies can be defined for each machine group, by clicking the Add button instead of the

Update *button.* This lets you specify different email lists for different ticketing events. For example, you may wish to send email alerts to a group of users for ticket creations and note additions, but send email to a different list of users for overdue tickets.

To be sent email notification for a ticketing event:

1. Check the box to the left of each ticketing event you need to be notified about.
2. Enter a comma separated list of email address in the **Email List** edit box.
3. Check the box to the left of all group IDs you wish to apply this notification policy to.
4. Click the **Update** or **Add** button.

> **Note:** You can *not* send notifications to the email address used to receive tickets, defined using Ticketing
> > **Email Reader** *(page xv)*.

From Address

The `From` address used by ticket notifications is based on the **Email Reader** *(page xv)* address, if one is defined. If an **Email Reader** has not yet been defined then the   `From` address in System > Outbound Email is used.

Notification Type Checkbox

The list below describes when the ticketing system sends an email notification *to all email recipients in the email list.*

- **Ticket Creation** - If checked, an email is sent at the time of ticket creation.
- **Modify/Add Note** - If checked, an email is sent when a ticket is changed, including adding a note to ticket.
- **Overdue Ticket** - If checked, an email is sent when a ticket passes its due date without being closed.
- **Edit Summary** - If checked, an email is sent when anyone changes the summary line for a ticket. Click **Format** to edit the format for this email notification.
- **Assignee Change** - If checked, an email is sent when a ticket is assigned to a different user. Click **Format** to edit the format for this email notification.
- **Field Change** - If checked, an email is sent when anyone changes any custom field in a ticket. Click **Format** to edit the format for this email notification.
- **Due Date Change** - If checked, an email is sent when anyone changes the due date of a ticket. Click **Format** to edit the format for this email notification.
- **Notify Ticket Submitter when note added** - If checked, an email is sent to the email address entered for the ticket submitter, in addition to the email list for all email notification messages.
- **Include all public notes in Modify/Add notification** - If checked, *all* notes for a ticket are included when a **Modify/Add Note** message is sent out.
- **Received email alerts always sent to assignee** - If checked, an email is sent to the ticket assignee, whenever a reply email is received and added to the ticket, even if the assignee is not on the notification email list for this group ID.
- **Send auto response to emails creating new tickets** - If checked, an automated reply message is sent out to the person that sent in an email that generated a new ticket. Automated response emails give your users an acknowledgement that their request has been received and processed by the system. Creating tickets based on inbound emails are configured using **Email Reader** *(page xv)* and **Email Mapping** *(page xvii)*. Click **Format** to edit the format for this email notification.

> **Note:** **Format Email...** buttons only display for master role users.

Select All/Unselect All

Click the **Select All** link to check all rows on the page. Click the **Unselect All** link to uncheck all rows on the page.

Machine Group

Lists machine groups. All machine IDs are associated with a group ID and optionally a subgroup ID.

Enable Events TMOAFEDNIRS

Identifies the ticketing events that trigger email notification of email recipients listed in the **Email List** column.

Email List

The list of email recipients notified by selected ticketing events for this group ID.

Access Policy

`Ticketing > Configure Ticketing > Access Policy`

The **Access Policy** page determines who can edit and/or display fields in tickets. Independent policies can be set for each user role and for all machine users. Machine users only see tickets assigned to their machine ID. Non-master role users only see tickets for scopes they are authorized to access.

Select user or role

Before setting any other policy options, select `<Users>`, meaning all machine users, or a user role from the drop-down list.

Access Rights

The following access rights apply to *all machine users* or to a selected *user role*, as specified using **Select user or user group**.

- **Enable ticket delete** - If checked, the selected user role can delete entire tickets using the **Delete/Archive** *(page vii)* page.
- **Enable ticket edit to modify or remove notes or modify summary line (Adding new notes is always enabled)** - If checked, the selected user role can edit existing notes or modify the summary line.

> **Note:** Adding new notes is always enabled for all user groups.

- **Enable associate ticket with editing** - If checked, enables the selected user role to edit the machine ID or group associated with a ticket.
- **Enable submitter information editing** - If checked, enables submitter information to be edited.
- **Enable due date edit when editing trouble tickets** - If checked, the selected user role can modify the ticket due date.
- **Enable suppress email notifications when editing trouble tickets** - If checked, the selected user role can suppress email notifications when modifying an existing ticket.
- **View hidden notes** - If checked, the selected user role can view hidden notes.

> **Note:** Hidden notes can *never* be viewed by users.

- **Change hidden notes status checkbox** - If checked for the selected user role, notes display a **Hide** checkbox at the far right edge of each ticket note. Toggling the **Hide** checkbox makes a note hidden or not hidden.
- **Automatically insert new note with every field change** - If checked for the selected user role, notes are automatically inserted whenever any ticket field changes.
  - ➢ **As hidden note** - If checked for the selected user role, automatic notes are added as hidden notes. This policy only applies if **Automatically insert new note with every field change** is checked.
  - ➢ **Allow admin to suppress auto note add** - Suppresses the adding of an automatic note when ticket properties are changed and no manual note is added.

- **Define access to each ticket field** - Defines access to each field for the selected user role. Fields are created using **Edit Fields** *(page xiv)*. Three levels of access are possible:
  - ➢ **Full Access** - Can view and modify this field in every ticket.
  - ➢ **View Only** - Can see but not change the value of this field.
  - ➢ **Hidden** - Hidden fields are not shown.

Assignee Policy

`Ticketing > Configure Ticketing > Assignee Policy`

The **Assignee Policy** page automatically assigns a VSA user to a new or existing ticket. Assignment is based on the combination of `List` type field values entered for a ticket. `List` type fields and their possible values are defined using Ticketing > **Edit Fields** *(page xiv)*. The policy is enforced every time the ticket is saved.

Overriding Assignee Policy

Assignee Policy can be overridden for a specific ticket using the **Create/View** *(page iv)* page, by the toggling the 🔄 icon next to the **Assignee** field to display a 💉 icon, then assigning a user manually.

Order of Precedence

The order of precedence for policy *selection* is based on the alphabetical sort order of the policy *name*, which also determines how the policies are listed in the paging area. For example, a policy named of `AAA` will always be selected before `BBB`, so long as all of the fields in `AAA` match the settings of the ticket. You can *force* policy selection to use the sort order you prefer by naming the policies accordingly. For example, you can add a numerical prefix to each policy name, such as 01, 02, 03, ... and adjust the sort order in this fashion. To rename existing policies, select the edit icon 📝 next to a policy name, then enter a new name and click **Apply**.

Policy Name

Enter the name for the assignee policy.

Assignee

Select the user who will be assigned tickets that match the selected combination of `List` type field values.

Create

Click **Create** to create the assignee policy.

List Fields

Each field of type `List`—such as **Category**, **Status**, or **Priority**—are shown as selectable drop-down lists. Select values for one or more of the fields. The combination of `List` type field values associated with an assignee determines which assignee is automatically assigned to a new or existing ticket.

Due Date Policy

`Ticketing > Configure Ticketing > Due Date Policy`

The **Due Date Policy** page sets the due date for each **new ticket** based on field values. Any combination of `List` type fields may be defined to set a due date. This allows you to set a new ticket due date based on the urgency of the ticket and a guaranteed level of service. For example, define a new `List` type field named **Service Level** with the following values: `Premium`, `Standard`, `Economy`. Create different due date policies for each combination such as:

- Set resolution time to `1 Hrs` when **Priority** = `High` and **Service Level** = `Premium`
- Set resolution time to `7 Days` when **Priority** = `Normal` and **Service Level** = `Economy`

When a new ticket gets created, the due date is set by adding the number of hours in the policy to the current time.

> Note: You can change the due date of an **existing ticket** manually using ***Create/View*** *(page iv)*.

Overdue Tickets

When a ticket is overdue, the due date displays in bolded dark red text, both in the **View Summary** *(page ii)* page and in Ticketing reports. It also displays in red text in the header of the **Create/View** *(page iv)* page. You can optionally send an email for overdue tickets using Ticketing > **Notify Policy** *(page ix)*. A ticket is resolved when its status is set to closed and the resolution date is recorded.

Order of Precedence

The order of precedence for policy *selection* is based on the alphabetical sort order of the policy *name*, which also determines how the policies are listed in the paging area. For example, a policy named of `AAA` will always be selected before `BBB`, so long as all of the fields in `AAA` match the settings of the ticket. You can *force* policy selection to use the sort order you prefer by naming the policies accordingly. For example, you can add a numerical prefix to each policy name, such as 01, 02, 03, ... and adjust the sort order in this fashion. To rename existing policies, select the edit icon next to a policy name, then enter a new name and click **Apply**.

Default time to resolve tickets with no policy

Enter the number of hours or days to resolve tickets when new tickets are created that do not match any policy.

Policy Name

Enter a name for a new or selected due date policy.

Resolve Time

When new tickets are created that match the field values in this policy, then the due date is set to this number of hours or days plus the current time.

Fields

Select values for one or more `List` type fields that a new ticket must match to automatically set the due date for the new ticket.

Delete Icon

Click the delete icon to delete a row in the paging area.

Edit Icon

Click a row's edit icon to populate header parameters with values from that row. You can edit these values in the header and re-apply them. The selected row is highlighted in yellow.

Name

The name of the due date policy.

Time

The time added to the current date and time to set the due date policy for a new ticket.

All Other Columns

The values of list fields that must be matched to set a due date for a new ticket using this policy. User defined `List` fields are maintained using **Edit Fields** *(page xiv)*.

Edit Fields

The **Edit Fields** page creates fields used to classify tickets and sets the default values for those fields. Fields are associated with the entire ticket, as opposed to each note of the ticket. You can *customize* the field label and corresponding values of each field, including the mandatory fields. The fields you define here display in the following pages: **View Summary** *(page ii)*, **View Ticket** *(page iv)*, **Delete/Archive** *(page vii)*, **Access Policy** *(page xi)*, **Due Date Policy** *(page xii)* and **Email Mapping** *(page xvii)*.

Mandatory Fields

Three mandatory `List` type fields exist that may not be removed from the system. The values for these list fields can be customized. The mandatory fields are:

- **Category** - Classifies tickets by IT category.
- **Status** - State of the current ticket: `Open`, `Hold`, `Closed`
- **Priority** - `High`, `Normal`, `Low`

Set the next ticket ID to N / Apply

Specify the ticket number for the next ticket. Displays the current "next" ticket number. Click **Apply** to confirm any changes.

Field Position

Click the up/down arrows to the left of the field label to change the display position for this field in **Create/View Tickets** *(page iv)*.

Field Label

You can modify the label for any field here. Click the **Update** button to apply the change.

Type

Specify the data type for each field.

- `String` - Can contain any text up to 500 characters in length. Best used to hold things like problem location or other variables that do not belong in the summary line.
- `Integer` - Can contain any positive or negative integer value
- `List` - Lets you create a drop-down list of choices. The choices for `List` type fields are edited by clicking the `<Edit List>` value in the **Default Value** drop-down list.

> **Note:** Only `List` type fields display as a selectable drop-down list that can filter the display of tickets in the **View Summary** *(page ii)* and **Delete/Archive** *(page vii)* pages.

- `Number (nn.d)` - A number that always shows one digit to the right of the decimal point.
- `Number (nn.dd)` - A number that always shows two digits to the right of the decimal point.
- `Number (nn.ddd)`- A number that always shows three digits to the right of the decimal point.
- `Number (nn.dddd)` - A number that always shows four digits to the right of the decimal point.

Default Value

Creating a new ticket automatically sets each field to its default value. You can specify that default value here.

> **Note:** Default values are system wide and may not be different for different machine group IDs or user roles.

> **Note:** **Email Mapping** *(page xvii)* can override the default values selected here for tickets created using **Email Reader** *(page xv)*.

<Edit List>

This value displays in the drop-down list for a `List` type field in the **Default Value** column. Click `<Edit List>` to edit the list of values for that field.

Update

Click **Update** to confirm changes to field labels, default values, or `List` type values.

New

Click **New** to create a new field.

Email Reader

`Ticketing > Configure Ticketing > Email Reader`

The **Email Reader** page specifies a POP3 email account to periodically poll. Email messages retrieved from the POP3 server are classified by **Email Mapping** *(page xvii)* and converted into tickets.

Alarm to Ticket Integration

When a VSA user clicks a `New Ticket...` link—typically for an alarm—anywhere in the system, the **Ticketing** module converts it into a ticket. The **Ticketing** email reader does not have to be enabled.

> **Note:** If the **Service Desk** module is installed, see Service Desk > **Activating Service Desk Integration** *(http://help.kaseya.com/webhelp/EN/KSD/9050000/index.asp#5478.htm)*.

Contents of Email

The **Email Reader** can receive any email, with or without attachments, and add the contents to the ticketing system. Additional information can be added to the email to enhance the mapping of the email to the ticketing system. The following tags can be included in *either the subject or the body* of the email.

- `~ticrefid='xxx'` - Appends the body of the email to an existing ticket rather than cause a new ticket to be created.
- `~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.
- `~userphone='xxx'` - Automatically inserts the value given as `xxx` into the **Submitter Phone** field.
- `~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.
- `~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. If this information is not included, and tickets are not assigned to a machine ID or group ID using **Email Mapping** *(page xvii)*, tickets are assigned to the `unnamed` group by default.
- `~fieldName='xxx'` - Assigns the value `xxx` for any defined field. If the field is a `List` type, then the value must exist in the list.

Suppressed Notes

Notes are suppressed if an email is sent with no body and no attachments or if no response text is sent with a reply email.

Email Reader Alerts

You can be alerted by email if the Ticketing > Email Reader fails using Monitor > Alerts - System alerts.

Email Address

Enter the email address you wish to retrieve email messages from periodically. Replies to this email address are in turn processed by the ticketing system and added as notes to the relevant ticket.

Disable email reader

Check this box to prevent the email reader component from polling a server.

View Log

Click **View Log** to review the polling log for this email reader.

Turn off independent ticket sequence numbering (use identity value)

For "on premises" single partition environments only, if checked, ticket numbers match the ticket numbers displayed in outbound emails. If unchecked, these two numbers can be different. These number always match in additional partitions.

Host Name

The name of the POP3 host service is needed. POP3 is the only email protocol supported. An example is `pop.gmail.com`.

Port

Provide the port number used by the POP3 service. Typically non-SSL/TLS POP3 ports are 110 and SSL/TLS POP3 ports are 995.

Use SSL

Check this box to enable SSL/TLS communications with your POP server. Your POP server must support SSL/TLS to use this feature. Typically, SSL/TLS enabled POP3 servers use port 995.

Logon

Enter the email account name. Do not include the @ domain name with the account name. For example, if the **Email Address** is `jsmith@acme.com`, then enter `jsmith` as the account name.

Password

Enter the email account password.

Check for new emails every <N> minutes

The number of minutes the **Email Reader** should wait before polling the POP3 server for new emails.

Reject inbound emails containing the following in the subject line

This option only displays for master role users. 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/9050000/index.asp#434.htm) page and the Service Desk > Incoming Email and Alarm Settings > General tab. This list can also be maintained manually by editing the `<Kaseya_Installation_Directory>\Kaseya\KServer\ignoreSubject.txt` file.

Apply

Click **Apply** to begin using the email reader.

Connect Now

Click **Connect Now** to connect to the POP3 server immediately instead of waiting for the next polling time. This can be used to test your configuration of the email reader.

Email Mapping

Ticketing > Configure Ticketing > Email Mapping

The **Email Mapping** page assigns default values for **new tickets** created using the **Email Reader** *(page xv)*. The default values assigned are based on the email address or email domain of the email *sender*. Matching can be optionally filtered by the text entered in the email subject line. This information overrides the standard defaults defined using **Edit Fields** *(page xiv)*.

Email Address or Domain

The email address or domain *of the sender*. For example: `jsmith@acme.com` or `acme.com`.

Set map for unassigned emails

If checked, assigns default field values for inbound emails not covered by any other email map.

Subject Line Filter

Assigns ticket defaults when the *email subject line matches the filter string*. Matching is case insensitive. No wildcard processing is provided. A single *, without any other characters in the filter, means let anything through. Booleans statements are not accepted. Single quotes and double quotes are not supported.

Associate map with

Click the **Select association** link to associate new tickets created using this map with a machine ID, machine group, organization, department or staff record.

Assignee

Enter the name of the VSA user assigned to new tickets created using this email map.

Fields

Specify the default field values assigned to new tickets created when an email is received by the ticketing system using this map.

Create

Click **Create** to create a new email map using the header values you have previously selected.

Delete Icon

Click the delete icon ✗ to delete this record.

Edit icon

Click the edit icon 🖼 for a row to automatically set header parameters to those matching the selected machine ID.

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