SysAid IT's That Simple

SysAid™

User Manual

Document Updated: 20 June 2010

Notice

Document Date: June 20, 2010.

Due to the inherently complex nature of computer software, SysAid does not warrant that
SysAid software is: bug-free, will operate without interruption, is compatible with all equipment and software configurations, or will otherwise meet your needs.

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Contents of SysAid User Manual

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Support

SysAid is committed to providing world-class technical support and professional services to its customers. **Free support** is included in every product purchase, the freeware edition, or the 30 day trial; this support is provided either by SysAid online, telephone, Skype, e-mail or MSN web messenger.

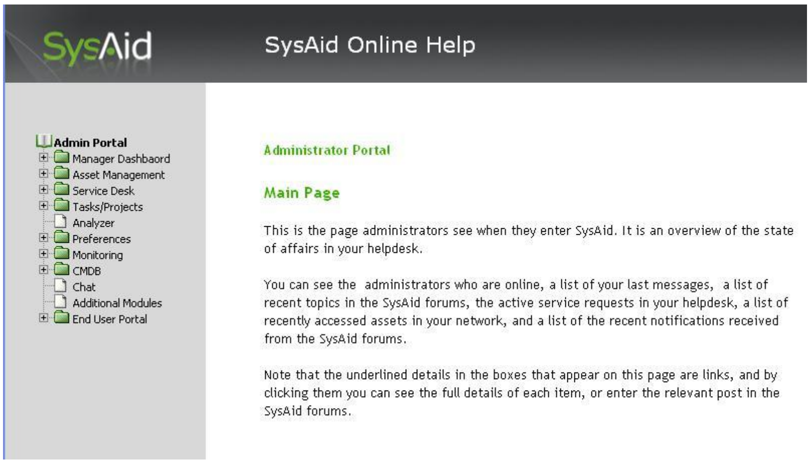
Before Contacting Support

We recommend that you do the following before contacting Support:

Download and install the product. Review the information on the SysAid Support pages (go to www.ilient.com and click on **Support** and then **Guides** or **FAQ**s or search the **Troubleshooting Section**).

Within SysAid interface, you may consult the Help file by clicking the question mark icon at the left of the top bar. This will open a popup screen with specific explanations about the page you are currently in. To navigate the help files, you may click the help library tree that appears on the left of the popup screen.

1 SysAid Help Files



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Support Contact Information – helpdesk@sysaid.com

When contacting Support, please include the following information, or have it available when calling:

- Your service request number.
- Your name, email address and phone number.
- Specific details about the problem, including system message, error codes and logs.
- Details about your system, including the operating system, hardware configuration, network details and other applications running on the system.

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Chapter 1 SysAid Modules

SysAid core product includes the following modules:

Helpdesk

Asset management

Monitoring

Reporting

Chat

IT Benchmark

With SysAid you will be able to:

- Automate handling of service calls to reduce response time and improve service
- Lower down-time by using more efficient system management.
- Create various escalation rules to secure your service quality at all times.
- Improve efficiency of hardware and software Asset Management
- Use integrated remote control capability to solve your users' IT issues quickly and securely
- Measure IT performance with detailed reports.
- And much more

SysAid™ contains additional modules that are available for purchase:

- **Tasks/Projects**
- **Manager Dashboard**
- **Monitoring (Server Monitoring and advanced monitoring capabilities)**
- **ITIL Package (Problem Management, Change Management and CMDB)**

You can also try for free a light edition of **Help Desk** and **Asset Management** or a full 30-day edition both options are available from our web site www.ilient.com

The extra modules are only available with the full 30-day free trial, or upon purchasing the full edition of SysAid.

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A Brief Review of the Modules in SysAid

Below is a brief review of each module, and you can find a detailed description of these modules later in this guide.

SysAid Help Desk Management

- Automate handling **of service calls** to reduce **response time** and improve service
- Based on parameters such as category and location, **service requests can be configured** to be rerouted automatically, change their priority or due date and perform other actions
- Service requests can be **sorted** according to user, due date and other fields
- Different views can be added to reflect customized outlooks on the Help Desk requests
- Administrators can create **escalation rules**
- Service requests can be placed in a **knowledgebase**, which can be searched easily
- End users and administrators are **automatically notified** about new, modified and escalated service requests

SysAid help desk offers you either a hosted online solution, or an installed solution for your IT needs. The help desk provides you with a simple yet comprehensive form that enables quick submission of service requests to an IT department. The administrator interface hosts a wide range of functionalities that assist you in managing a busy help desk:

Features included:

- Comprehensive escalation functionalities
- Intuitive, customizable interface and efficient methodology
- Service request priority defined by pre-determined rules based on category, urgency, and other fields

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- Automatic routing of service requests according to pre-defined parameters and priority
- Automatic logging of all service requests and corrective actions
- Customizable help desk interface allows sorting of service requests by type, preferences, severity, and more
- Knowledgebase of important service requests
- Editable record of common problems & solutions for end users to browse through
- Full communication abilities--users can email, SMS, and instant-message one another
- Automatic notifications, via email or SMS, of new, modified, and escalated service requests
- Customizable alert system highlights urgent, unresolved, or escalated requests
- User and administrator groups enable dividing the help desk into logical units
- Supports access via mobile phones and PDAs.
- Multilingual capabilities.

SysAid Asset Management

- Lower down-time by using more efficient **system management**
- Improve efficiency of hardware and software **inventory management**
- Desktops, laptops, and other assets are listed and grouped using an **automatic deployment tool**
- Hardware and software changes are **updated automatically**
- Administrators can have complete **remote control** of machines
- Easy integration with external purchasing and ordering systems via **XML**
- All reported changes are saved in a permanent computer record, which contains hardware/software and **service history**

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SysAid offers asset management functions. SysAid scans the network of the organization, and provides IT the necessary information. IT managers and administrators can easily see information such as listed above without leaving their offices. SysAid retrieves the assets information automatically, which is by far more effective than listing the data in a spreadsheet. SysAid Asset Management is extremely useful, because it is impossible for IT to manually list all assets, the details of assets, and changes the assets go through.

With SysAid:

- Network computers detected automatically; no need to input assets manually
- Hardware and software of assets are automatically detected and displayed; no need to input asset information manually
- Hardware and software changes on assets detected and updated automatically; SysAid keeps an updated picture of the network and its machines
- All reported changes saved in a permanent "asset record", which contains hardware/software and service history
- Assets easily located using powerful search/listing functionalities
- Full and easy remote control of assets
- Assets interface with the help desk, displaying (and alerting administrators of) service requests associated with them
- Easy integration to external purchasing and ordering systems via XML
- Tracking of software and supplier catalogues
- Enabled feedback about your Helpdesk services from end users.

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Monitoring

- **Constant tests** for memory usage, hard disk usage, vital OS services and processes, network services, software and hardware updates and more

- A warning or error notification will be sent to you when something is wrong. SysAid can **open an automatic service request**, notify you by **email**, or even send you an **SMS message**

- You can see a **visual representation** of all the monitoring tests on daily, weekly, monthly and yearly **graphs**

- Configure **monitoring templates** for any number of servers or workstations

With the SysAid monitoring tool:

- Ensure utmost functionality of all your network components, from your most vital network applications, your servers, and down to each individual workstation on your network.
- Servers monitoring and workstations monitoring.
- Configure the necessary checks that will be preformed on each asset or on a group of assets yourself.
- Create special templates composed of different series of checks that can then be assigned to the relevant assets.

Please note: the monitoring module exists in a limited version in the Free SysAid Edition. To learn more about the SysAid Monitoring module, check the complete SysAid Monitoring Guide at: http://ilient.com/down/monitoring6.pdf

Reports

- Automatic, pre-defined reports on help desk activity, service quality, hardware/software inventory and more

- Reports can be **configured** to match administrators' needs

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Manager Dashboard

- An immediate and customizable graphic Dashboard overview of the state of affairs in your organization

- A wide choice of reports that can be scheduled, customized and sent to different users

- Various possibilities for modifying reports according to your specific needs or creating entirely new reports

Projects and Tasks

- Allows you to create, list and manage projects and tasks
- Tracks work progress and resource use
- Allocates time wisely
- Keeps record of all activities
- Stores relevant documentation
- Graphical Gantt chart of the projects and tasks

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ITIL Package

The Information Technology Infrastructure Library (ITIL), is an international framework of best practices for IT management and service quality, released by the UK Office of Government Commerce (formerly CCTA).
SysAid was established in 2003 on core ITIL principles which have since provided the foundation for all future SysAid Research and Development designs. Over the years, we have continued to develop in accordance with ITIL methodology, and remain dedicated to bringing ITIL best practices to your IT environment.

SysAid CMDB

- SysAid CMDB allows you to Keep track of significant elements in your IT network
- Holds an unlimited number of CIs of all types
- Allows more than 250 customizable fields - to fit your exact needs.
- Helps you predict the influence of changes in your network on future developments and business impacts.

ITIL Problem Management

- Analyzing root incident causes
- Proactively handling problem areas to minimize incident recurrence and business impact
- Grouping isolated SRs into related problem themes
- Knowledgebase of known errors and work-around methods.
- Helps you proactively eradicate root problem causes in your organization.

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ITIL Change Management

- Handle process framework for implementing effective organizational change
- Minimize the risk of business exposure and service disruption.
- An unlimited number of change processes
- Customizing options to suit any change scenario in your organization.
- Automate workflow approval processes with ITIL's proven chain of approval.
- Apply pre-defined change templates
- Perform multi-level risk assessments and authorizations with a full audit trail.
- Set secure notes, tasks and permissions for multiple stakeholders

And more.

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Chapter 2 Installation and Successful Login

If you have purchased SysAid Hosted Online Solution, please go to **SysAid on-demand online Solution** (below) for login details. If you have purchased the installed solution for your server, installation instructions will now follow.

Installation

Please go to the following document for detailed installation instructions:

Guide 1: Installing the SysAid Server

http://www.ilient.com/down/installation_guide.PDF

The installer asks you what language you would like as the default language for SysAid. For detailed instructions on setting up language consult Chapter **7: Tools for Customization in SysAid.**

Logging In

There are two options to login to SysAid. Either you will access SysAid On-Demand Online Solution from the Internet or you will install SysAid on your network.

SysAid On-Demand Online Solution

Upon ordering the on-demand online solution of SysAid, you were supplied with an Account ID, Username, Password, and login URL. Use your details to login to your SysAid On-Demand Edition. You can also be provided with a unique domain upon request. The account compartmentalizes your network as to distinguish it from other networks that use SysAid online solution. No account has access to any other account, and one account is enough for even the largest organization.

If you have any questions you can contact the support team: support@sysaid.com

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Accessing SysAid on the Network

With the installed edition, open any internet browser. Input a URL in the following form:

Http://<server IP>:port

<Server IP> refers to the IP address of the server SysAid is installed on (IPv6 is supported by SysAid). Port is the port number SysAid is listening on. If the port is 8080, you do not need to enter it, since browsers assume port 8080 by default. You specified the port number when installing SysAid. If you are using the computer SysAid is installed on, you already have a shortcut under your **Start** menu. You can now start SysAid using this shortcut.

When SysAid loads, input your Username and Password and make a note of it

Enter your Username and Password. Upon installing SysAid on your network, you, the main administrator, were prompted to create an administrator username and password during the installation setup. Please make a note of your Username and Password.

If you forget your main administrator username and password you can reset this password. Note that if your database type is Derby, you would have to go to "services.msc" and stop the "Sys Aid Server" service before running this command.

1. Open CMD
2. Change the directory to "C:\Program Files\SysAidServer\util"
   (cd C:\Program Files\SysAidServer\util)
3. Type "ResetPassword" and click **Enter**.
4. You will receive a list with the available account Ids

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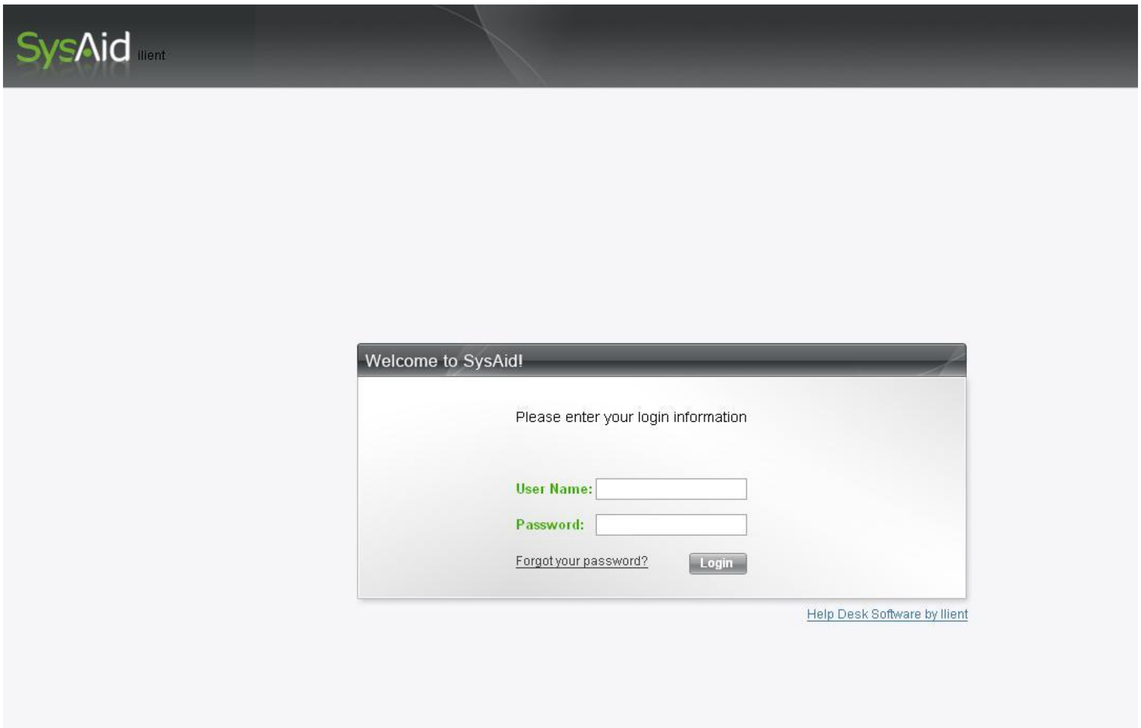
5. Type "ResetPassword account_id" . Please make sure you type the account id from the list above correctly, since it is case sensitive. If you will not type it correctly it may cause a corruption in your database.

Now click the **Submit** button to login.
All users should see the following login screen.

2 Log-in via SysAid on your network



If an ordinary administrator has forgotten his/her password, they can click the link **Forgot your password?** In the login page, and reach the following screen:

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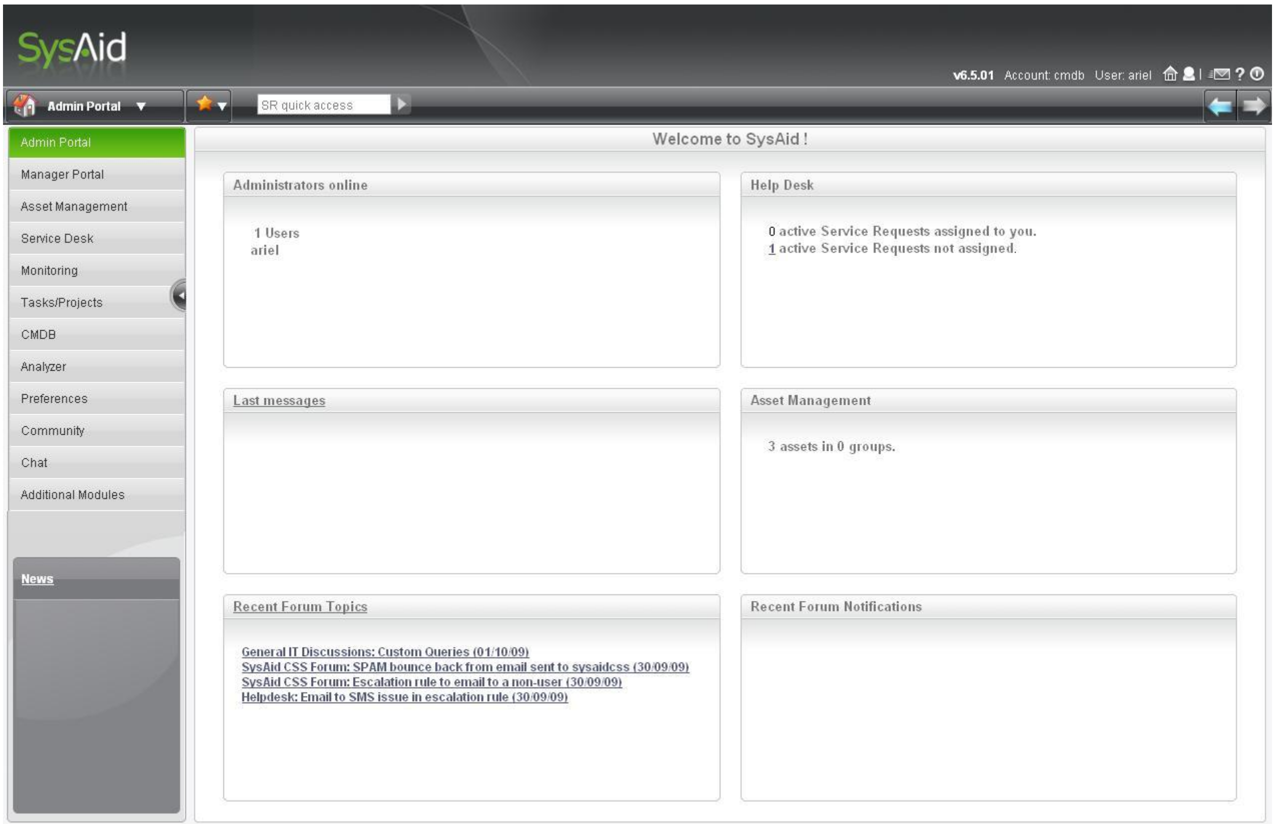
3 Forgot Password Screen

Once logged-in, administrators will navigate to the administrator interface.

4 SysAid Welcome Home Page



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Following successful login, you can commence to deploying and configuring the system.

The Three Interfaces in SysAid

SysAid contains three portals: the end user interface, the administrator interface, and the manager interface.

In SysAid there are three types of user: end users, administrators and managers. The **end users** can submit service requests via the SysAid interface, email, telephone or a customized web page. The **administrators** are able to respond to incoming service requests, to configure settings in the help desk and asset setting, or in the Projects and Tasks SysAid modules. The **managers** can review, generate and send automatically scheduled reports, as well as to have a quick overview through the dashboard in the **Manager Dashboard**.

End User Interface

From this portal the end user can access several pages: the submission form for sending his/her service requests; self service page, to review common problems (if enabled); a page to review old service requests, and a page to re-design their own user settings. End users can search, print, or export to a CSV file their own service requests. End users who are supervisors can also view their supervised service requests. The end user has no access to the administrator interface or to the Manager Dashboard.

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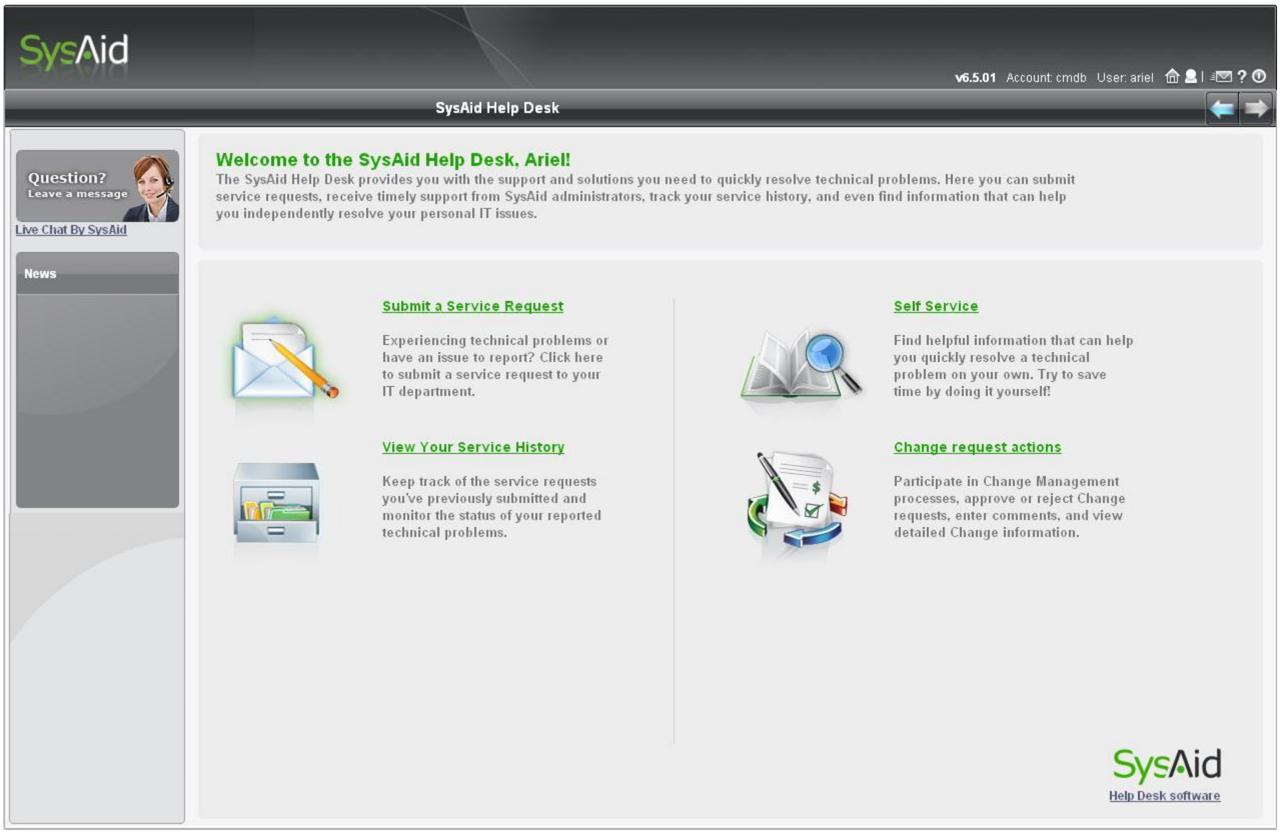
5 End user interface



Administrator interface

From the administrators portal you can set and control the help desk, the inventory, the tasks/projects modules, all the administrators and all your end users settings. You can also run reports using the Analyzer from this interface. Those administrators who are defined as SysAid Administrators have access to a wider range of options and settings. Ordinary administrators do not have access to the Manager Dashboard.

Manager interface

SysAid managers log into an interface designed especially for them. Here you can immediately see the main four dashboard charts, which provide an instant

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picture of the current state of affairs in your IT department. The Manager Dashboard also includes various reports and tools to assist you with running and modifying them for your specific needs. To learn more about SysAid Manager Dashboard, please go to chapter 11: **SysAid Manager Dashboard** in this guide.

Related Guides and Reading

Guide 1: Installing the SysAid Server

http://www.ilient.com/down/installation_guide.PDF

Guide 3: Getting Started Guide

http://www.ilient.com/down/getting_started.PDF

Guide 10: Manager Dashboard Guide

http://ilient.com/down/Manager%20Dashboard%20Guide6.pdf

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Chapter 3 - Setting Up Users

- **SysAid** is highly customizable: You can add or remove users or fields, redefine your forms and interface or adjust your translation of the system quickly, with only a few clicks
- Suitable for technical and non-technical users, **SysAid** is **intuitive** and easy to use
- Service requests can be placed in a **knowledgebase**, which can be searched easily
- End users and administrators are **automatically notified** about new, modified and escalated service requests

In SysAid you need to set up new administrators and end users; and to add the user information for both administrators and end users. This task is performed by an administrator.

In SysAid there are three ways you can add administrators and end users.

- **Manual Set Up.**
- **Import users via lightweight directory access protocol (LDAP) compliant directory software, e.g. Active Directory.**
- **SysAid can create an end user automatically**

This chapter will describe the different ways to add users.

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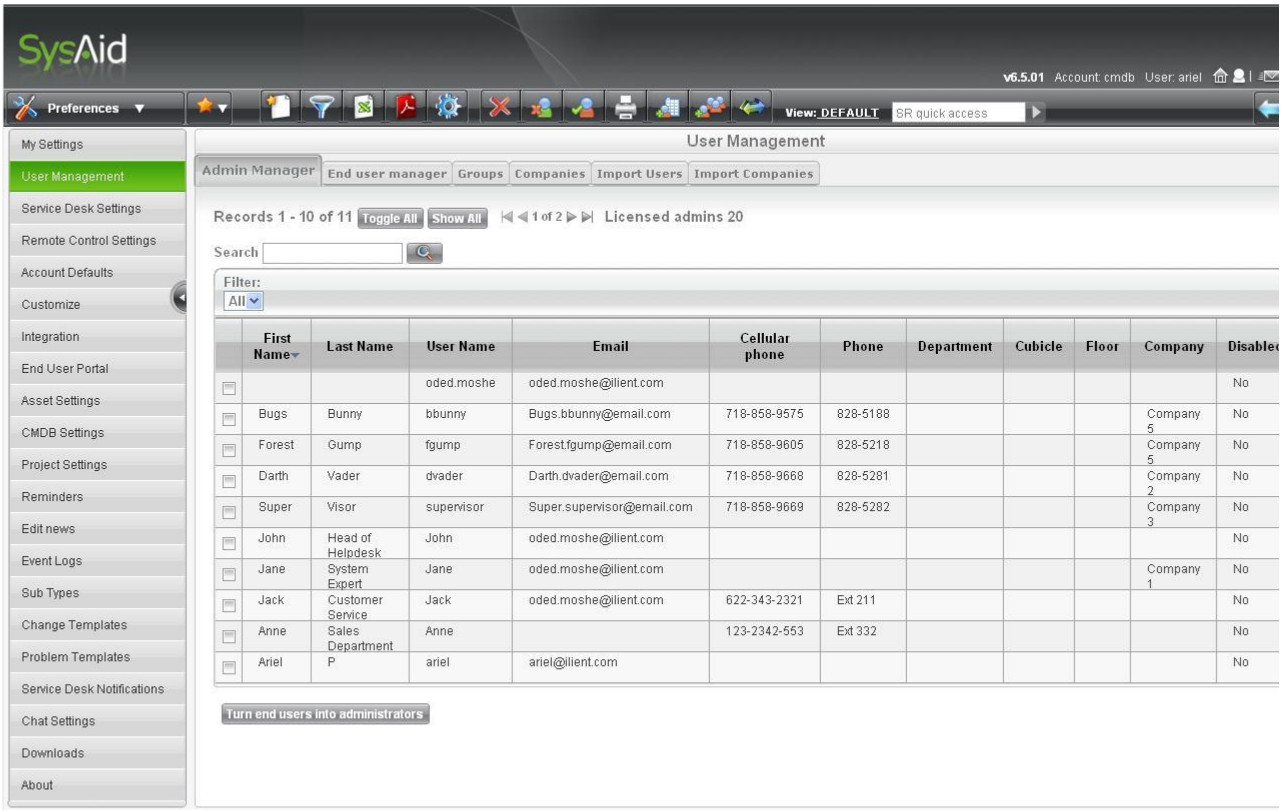
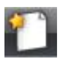
Manual setup

Add New Administrators

1. To add a new administrator in SysAid, go to **Preferences → User Management →Admin Manager** tab.

6 Admin Manager Tab



2. To manually add a new administrator, click on the new  icon in the top left corner. You will reach a form (**New admin**) where you can input details for a new administrator.

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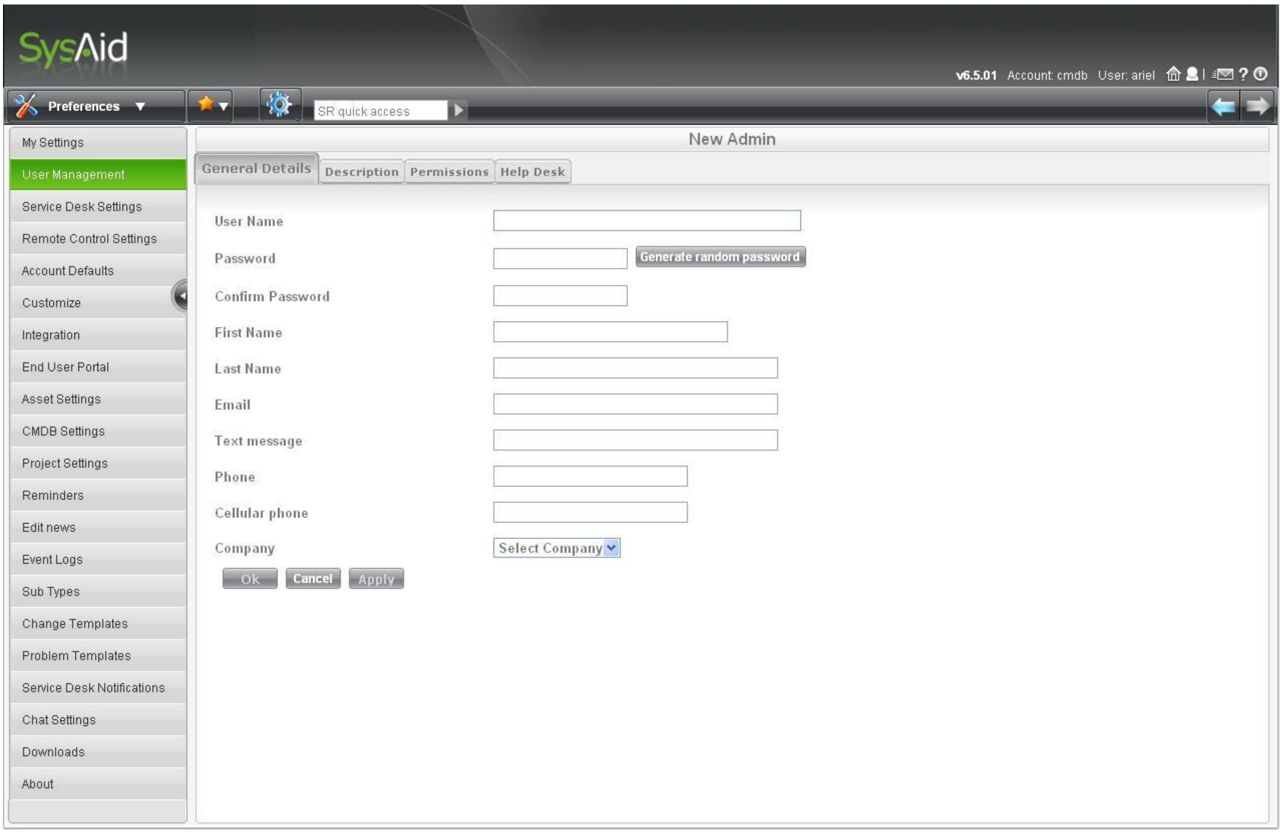
7 Creating a new administrator



3. Fill out the **General Details** form and click **Ok.** You will be prompted with the following popup box message: "Would you like SysAid to email the new user his/her details?" Click **Yes.** The user will now be sent his/her username and password for accessing SysAid.

Add Supplementary Details on Newly Registered End Users and Administrators

Once you have added a user (administrator or an end user) you can insert additional details in the **Description** page. To access this page, click on the name of the user either in the **End User Manager** or **Admin Manager**; then click on the **Description** tab at the top of the page.

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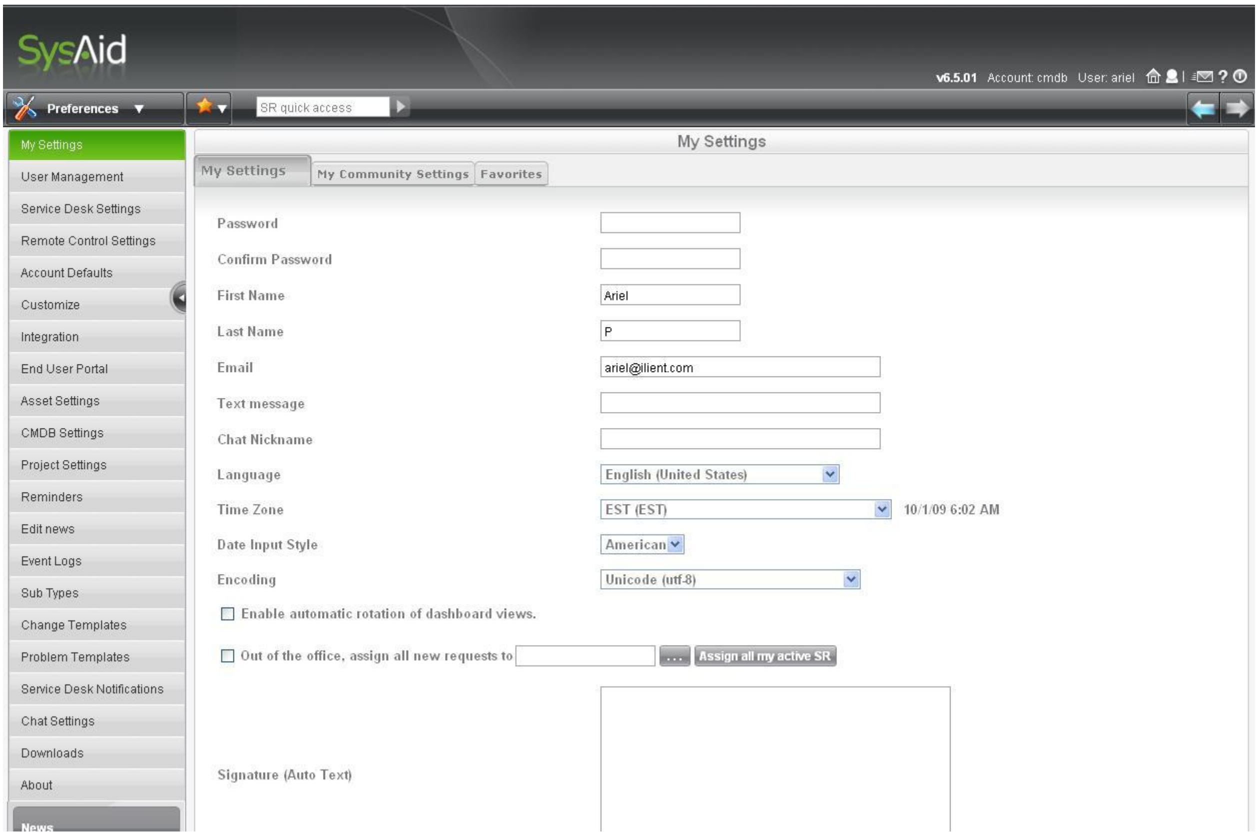
Administrator Settings

To customize your settings as an individual administrator, you should change the parameters in the **My Settings** page.

Go to **Preferences → My Settings**.

8 My Settings Page



Set Language Settings for Administrators

1. To change the language settings across your SysAid interface go to the **My Settings** page, and in the **Language** field select the desired language. Click on the dropdown menu to be able to select a language from the list. Make a note of this option as you need to select the same language in the **Translate** page later on.

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2. In order to change the encoding so it will support reading and writing in your local language, move further down in the page, and click on the dropdown menu next to **Language.** Alter this setting to your desired language. For languages other than English, Dutch, French, German, Spanish, and Italian (Latin 1, en-iso-8859-1) you need to ensure that you select **Language: Unicode (UTF-8)** under **My Settings** and in **Account Defaults**.
3. Once you have completed the fields on this page, click **Save**.
4. Go to the **Translate** page (**Preferences** → **Customize** → **Translate**). At the top left hand side of the page, in the **Language** field, choose the language you set in the **My Settings** page (step 1). For languages other than English, Dutch, French, Hebrew, German, Spanish, and Italian, you will have to perform a one-time translation of all the term listed in the **Translate** page. Possibly, there is an available translation to your language in the SysAid Community:
   http://ilient.com/Sysforums/forums/list.page?listType=translations
5. SysAid uses a dictionary file to support the various languages. You may change the terms for the supported languages and perform a one-time translation for new languages.
6. You can choose which languages will show in the language dropdown lists in SysAid, under Preferences→ Account Defaults. Click the Available Languages button, and uncheck the languages you do not wish to make available for SysAid users. Only languages chosen will be visible when users select their preferred language. The selected languages will be available to the End User under My settings. Note that SysAid Pro edition supports a maximum of two languages.

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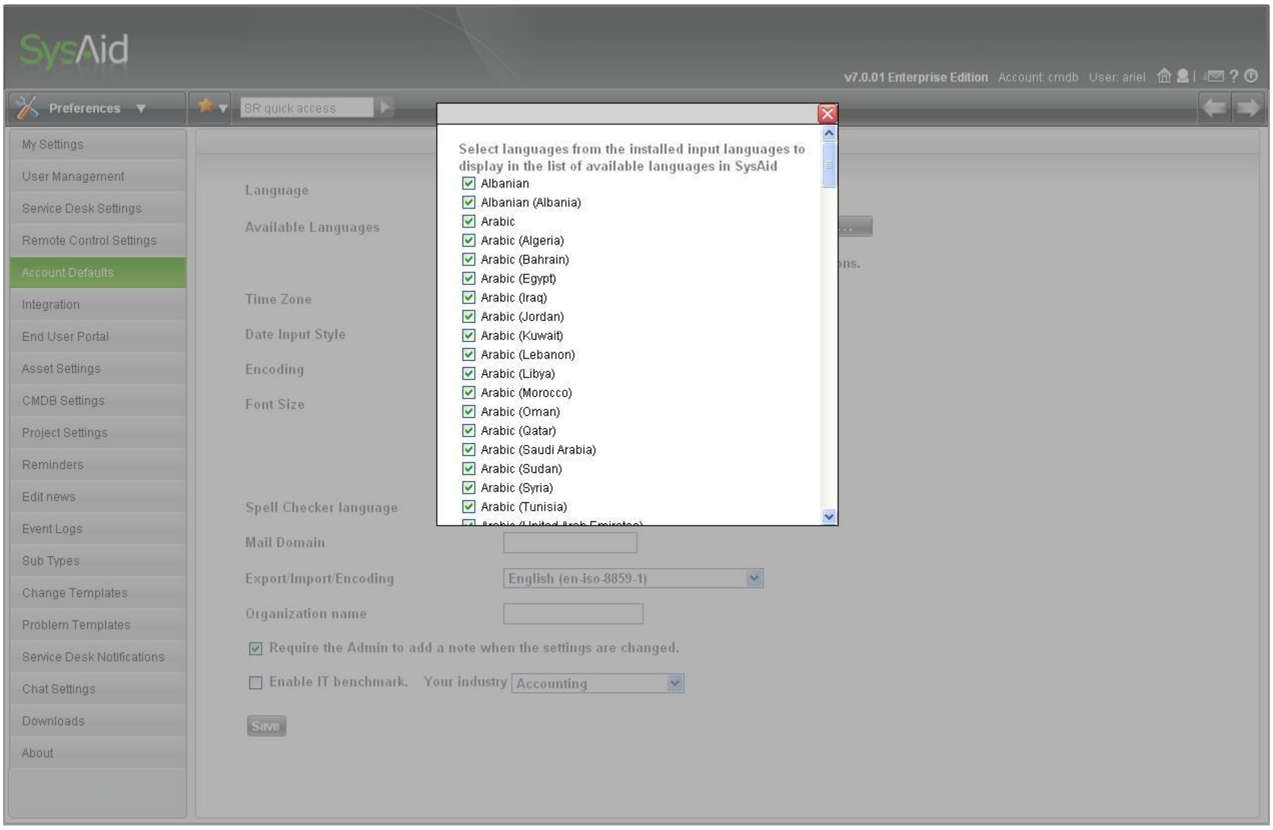
9 Select Available Languages



Set Signature

SysAid administrators can edit their own text used when sending messages through SysAid. Under **Preferences →My Settings** page, insert your signature in the text box, and click **Save**. Note that it is possible to use the tag “$” in order to insert variables. See table 7 in this guide for a full list of possible tags.

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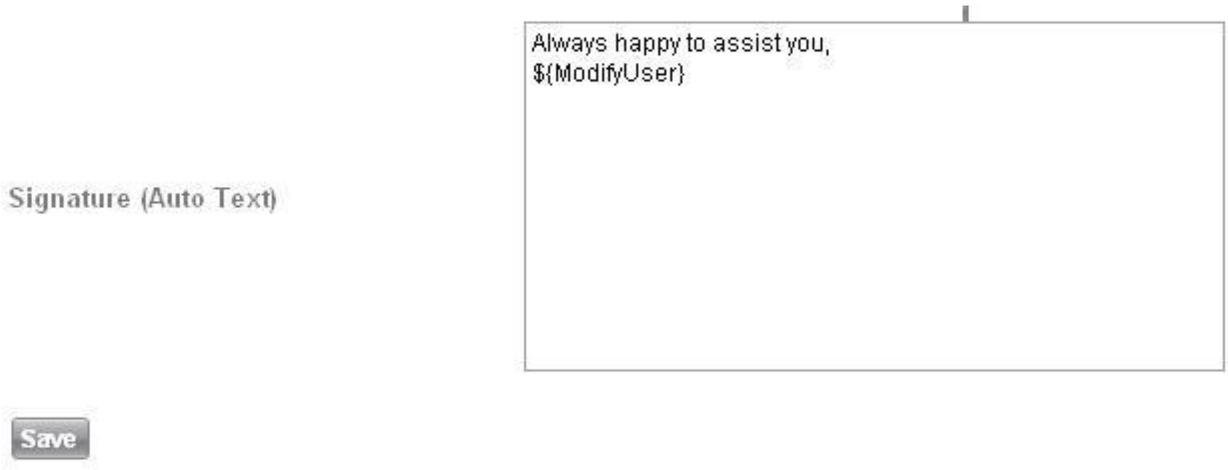
10 Add signature



Out of Office

If you are going on a vacation and wish to direct your incoming service requests during the time you will be away to another member of the support team, you can do so simply by ticking a check box. Under **Preferences → My Settings** there is an option for an out of office support, that is, requests that are assigned to an administrator who is out of office, or are queued by routing rules to such an administrator, can be rerouted to an assigned available administrator instead.

Administrator Permissions

You can set for each administrator his/her permission level. Decide on what kind of access you want your administrators to have, and make your selection in the **Permission** tab (**Preferences →User Management→** Click on the administrator → **Permissions** tab). The **Permission** tab includes eleven potential accessibility options available for an administrator. Here is an explanation of the different available permissions:

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1. **View Inventory**

If you check the box next to this permission, the administrator in question will be able to view your network inventory. However, you can limit the administrator's view to a certain inventory group that you have set-up earlier on, by choosing the name of the relevant group from the dropdown menu which appears in this line.

2. **Modify Inventory**

If you check this box, the administrator in question will be able to modify the inventory of your network.

3. **View Service Requests**

Here you can choose to limit the service request the administrator can view. For instance, you can decide that this administrator will see only service requests that are assigned to him/her or to his/her admin group. Also, it is possible to choose that this particular administrator will not be able to see any service requests at all, simply by un-checking the box.

4. **Modify Service Requests**

Here you can choose to limit the service request the administrator can modify. For instance, you can decide that this administrator will be able to modify only service requests that are assigned to him/her or to his/her admin group. Also, it is possible to choose that this particular administrator will not be able to modify any service requests at all, simply by un-checking the box.

This is a special permission for an administrator to purge a service request. If you check the box, this administrator will be able to delete any service request from your database.

6. **View Projects**

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This box can only be checked in the full edition of SysAid, and only if you have purchased the Projects and Tasks module. To learn more about the Full SysAid edition ,please follow this link: http://ilient.com/fullversion.htm . Here you can choose whether a particular administrator will be able to view all or some of the projects. You can limit the administrator's view of the projects according to the administrators/admin groups that these projects are assigned to. Simply select the relevant names from the dropdown menu. Note, however, that you first have to define projects and assign them to administrators or groups to be able to define this viewing permission (**Tasks/Projects→ Project List→** click a row entry→ **General Details→ Project Manager**)

7. **Modify Projects**

This box can only be checked in the full edition of SysAid http://ilient.com/fullversion.htm and only if you have purchased the Projects and Tasks module. Here you can choose whether a particular administrator will be able to modify all or some of the projects. You can limit the administrator's permission to modify the projects according to the administrators/admin groups that these projects are assigned to. Simply select the relevant names from the dropdown menu. Note, however, that you first have to define projects and assign them to administrators or groups to be able to define this modifying permission (**Tasks/Projects→ Project List→** click a row entry→ **General Details→ Project Manager**)

8. **View Analyzer**

By checking this box you will enable the administrator an access to the analyzer function, so the administrator will be able to generate reports about workflow and service quality. To learn more about the analyzer function, please go to Chapter 9 in this guide.

9. **Remote Control**

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By checking this box you will allow a particular administrator to remote control other computers in the network. Even if the user is not logged on, SysAid will enable the permitted administrator to remote control the asset. You should set the remote control permissions for particular workstations. To learn more about remote control, please go to the section *Remote Control Settings* in Chapter 5 in this guide.

10. **Limit to its company data only**

If you have set up different companies that different administrator belong to, by checking this box you can limit each administrator to its company data only.

11. **SysAid Administrator**

Enabling the checkbox next to this option will permit the administrator to change items accessible via the **Preferences** submenu.

12. **Manager**

Checking this box will determine the administrator as a SysAid Manager, and enable him/her access to the Manager Dashboard. To learn more about SysAid Managers, please go to Chapter 11 in this guide.

13. **Change Manager**

Checking this box will determine the administrator as a change manager, which allows him to create, edit and follow a change or a problem process, and all its action items.

14. #4912 **Create Change/Problem**

Checking this box permits the administrator to create a new change or a problem process, based on an existing template. Note that the administrator does not have to be a change manager.

15. **View other Admins' action items**

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Checking this box permits the administrator to view the action items for which other administrators are responsible.

16. **View CMDB**

Checking this box allows the administrator to see the graph and the relations between CI-s in the CMDB

17. **Modify CMDB**

Checking this box allows the administrator to add new CI-s and to edit the relations between CI-s in the CMDB.

18. **Access Chat Console**

Checking this box allows the administrator to receive and initiate chat sessions with end users.

19. **Chat Administrator**

Checking this box allows the administrator to view closed chats, to edit the chat preferences and to supervise chat sessions conducted by other administrators.

20. **Restrict access to specific URLs**

Here you can prevent administrators from accessing specific pages within SysAid. This restriction will be in addition to their existing permissions. Click the three dots button to select the URL of the page you wish to limit the access to.

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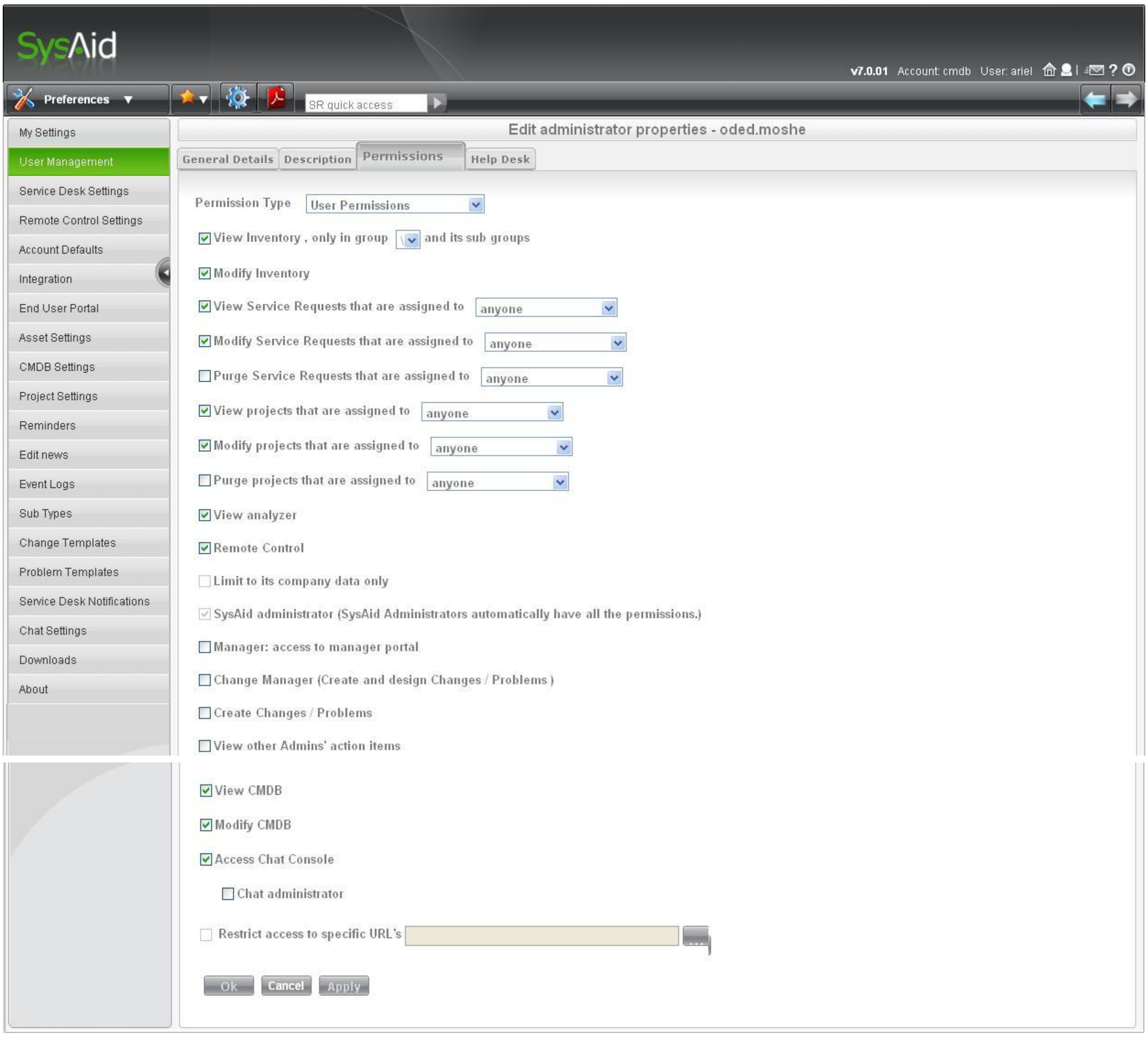
11 Administrator Permissions



Adding New End Users Manually

Add New End Users

1. Go to **Preferences→ User Management→ End User Manager** to add new end users.

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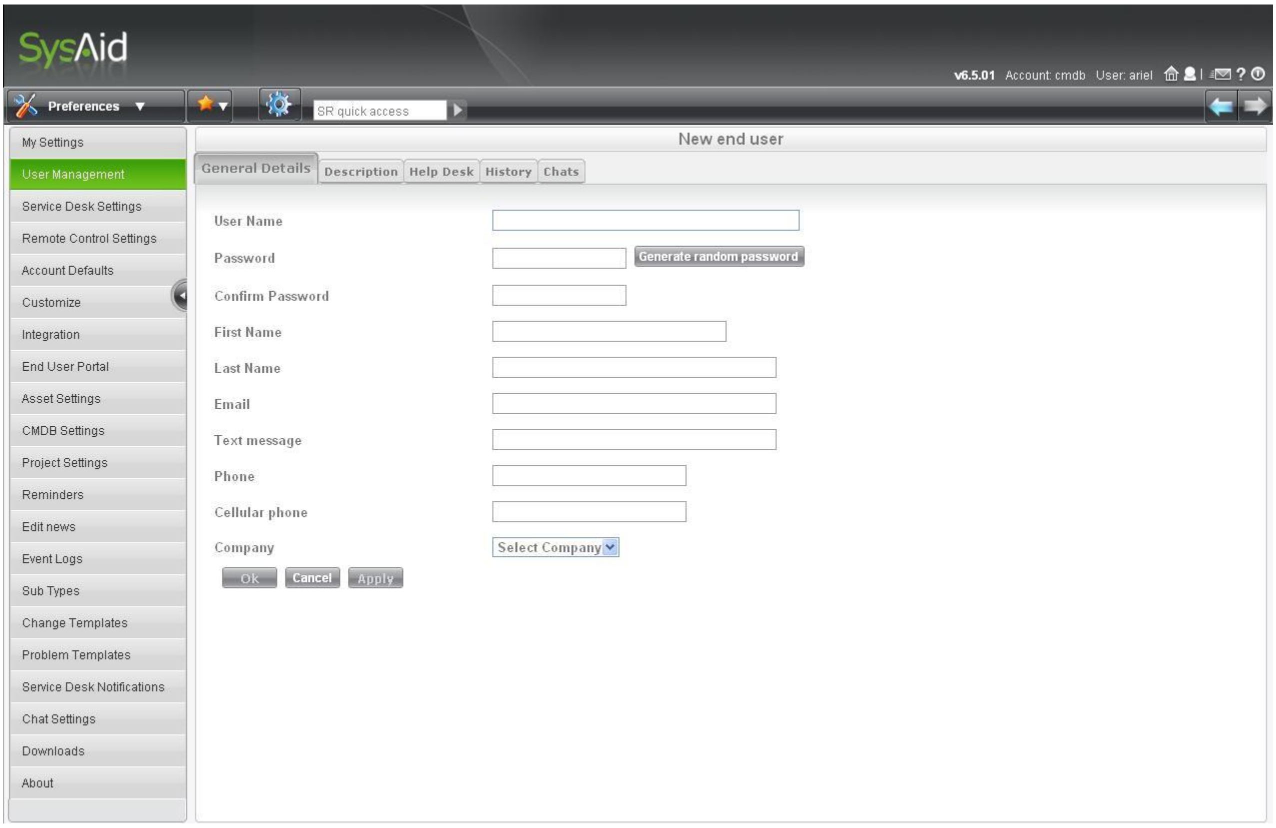
2. To manually add a new user, click on the **New** icon in the top left corner. You will reach a form called **New End User** where you can input details for a new end user (Figure below)

12 New End User



3. Fill out the **General Details** form and click **Ok.** You will be prompted with the following message: Would you like SysAid to email the new user his/her details? Click **Yes.** This will enable your new users to receive an email with their login details.

4. You will automatically return to the **End User Manager** page; here you will see listed the newly added end users.

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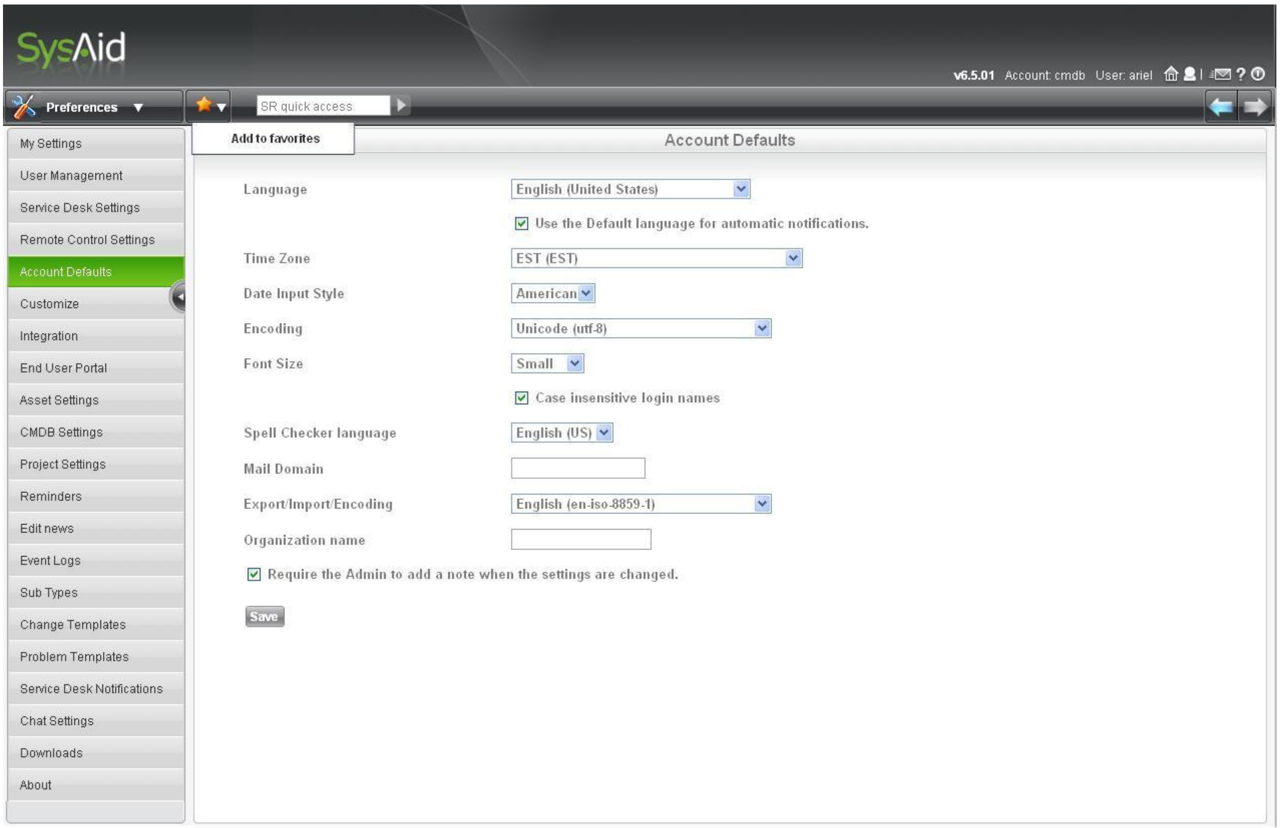
Setting Up Account Defaults for All End Users

In the sidebar, click **Preferences→ Account Defaults**. Since you will create more users, the account-defaults can save you time, by providing automatic settings for those users. Specify the settings you would like most users to have.

13 Setting account defaults for all users



You should select the appropriate option from the dropdown menus to encode email text and attachments in the **Export/Import/Encoding option.**

Language Set Up for End Users

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To set up language setting follow the instructions above **(Set Language Settings for Administrators).**

Removing Users from SysAid

Delete End Users

In the **End User Manager** page you can delete an end user from the list. Select the end user/s to be deleted by clicking the tick box next to their name, then click on the **Delete** button on the top menu bar. To just disable an end user, rather than delete him/her for good, select the end user/s to be deleted by clicking the tick box next to their name, then click on the **Disable** button on the top menu bar. Similarly, to reverse this action and re-activate this user, check the tick box next to that end users' name and then clicking the **Enable** button .

Delete an Administrator

You can delete administrators in the **Admin Manager** tab. Enable the check box next to the name of the administrator you wish to delete. Click the **Delete button** on the top menu bar. A popup box will open asking you to confirm deletion of the administrator. Click "OK" to proceed. A second popup will open asking you to "Transfer all duties of (Deleted Administrator) to (New Administrator)". You can also choose to assign the duties to no other administrator.

When reassigning the duties of an administrator you are deleting, SysAid reassigns Routing Rules, Escalation Rules, and Quick Lists in addition to Service Requests. For service requests, you can choose to transfer only active service requests or to transfer all service requests by checking the appropriate box.

14 Transfer Duties Popup

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The main administrator can also be deleted. However, it is not recommended to delete the main administrator, as this is the only user who can deal with troubleshooting LDAP.

Setting Up a Department Field for Users

To assist in registering your end users you can add their department details so as to help the IT department when responding in person to service requests. Setting up department field for users is necessary if you wish to nominate end-users as department supervisors. See **Chapter 8 Managing Help Desk - Advanced Settings** in this guide to learn more about supervisors.

1. To add a **Department** dropdown menu filed, go to the **General Details** page**.**
2. Click on the Customize icon.
3. A popup screen will open, called **Design Form**. In the box called **Available Fields** select the **Department** field. Click on the arrow button to move it to the **Visible Fields** box.
4. Click **Save.** This new field will now appear in the page.

To set up the contents of the **Department** dropdown menu:

1. Go to **Preferences → Customize → Customized Lists.**

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2. In the **List** dropdown box select **Department**.
3. You should use a numeric figure in the **Key** box. Add the text description in the caption box. Click **Add** to save this line entry.
4. You can adopt any numerical coding sequence (1, 2, 3, 4, 5 or 10,11,12,13,14 etc.) You cannot use the same number twice as this causes the entry to be overwritten. Do not punctuate numbers with commas "," or with full stops "." Also, please keep a continuous sequence, to prevent future breaches.
5. Once you have added all entries to the dropdown menu, click **Save.**

Now you should be able to see the new dropdown menu on the **General Details** page.

Dividing Users into Companies

If you are a helpdesk provider and have outsourced your help desk facility, or are the mother company that provides all the IT services for all associated companies, the facility that enables you to divide users into companies is greatly beneficial. To learn more about creating companies and user groups, please check section **4.2** in this guide: **SysAid Help Desk- How to Optimize your Workflow**.

Also, dividing users into companies is necessary in case you wish to determine end users as company supervisors. To learn more about supervisors, please go to **Chapter 8 Managing Help Desk – Advanced Settings**

Import users with lightweight directory access protocol (LDAP)

Importing users and user information into SysAid using lightweight directory access protocol (LDAP) compliant directory software has several benefits:

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LDAP -The Benefits

1. Allows to continue using the username and password your users currently have on your network to access SysAid.
2. Preserves central location of directory of information on users (address, telephone and cellular phone numbers).
3. Saves time. IT administrators do not have to build new directories and add user information manually.
4. No duplication of user data.
5. The basis for using single-sign on. Avoids double logins.
6. An option for secure integration

The most common LDAP compliant software used is Active Directory. If this is what your organization uses you can easily integrate Active Directory with SysAid. If you integrate users with LDAP, SysAid will treat that information as read only data. Therefore any changes that are made to current users should be made to the Active Directory itself. SysAid will then upload the changes once the user logs in or if you "**Refresh from LDAP"** and have not disabled that user.

SysAid LDAP Wizard

Importing Users with an LDAP Compliant Directory

The full edition of SysAid imports users and authenticates users by implementing LDAP integration. To learn more about SysAid Full edition, please follow this link: http://ilient.com/fullversion.htm You can use any application that can read an LDAP directory or is directory enabled, for example Microsoft Active Directory, Open LDAP or Novell LDAP.

During installation you should have configured SysAid to work with your LDAP compliant directory, for example Active Directory. If you did not manage to do

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this during installation you can configure the Active Directory integration in the LDAP Configuration Wizard within SysAid.

LDAP Configuration Wizard

1. To integrate SysAid with your LDAP compliant software, for example Active Directory go to **Preferences → Integration → LDAP tab**.

15 LDAP Integration

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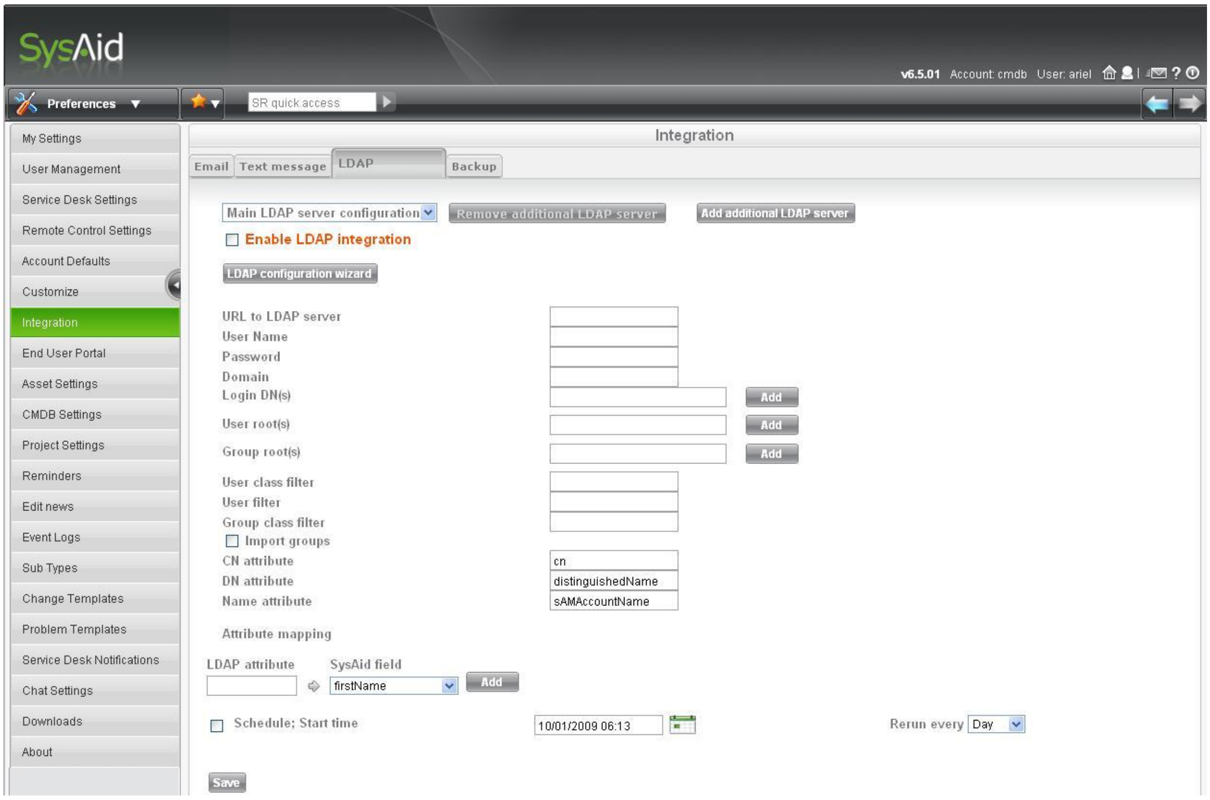

2. Click on the **LDAP Configuration Wizard** button. A popup screen will open. Check that all the fields are complete. Make sure you complete the following four fields: LDAP host name, user name, password, and domain. For the **Username** and **Password** fields, you can use any username that has read only permission.
3. Note that you can check the appropriate box in the wizard for a secure LDAP SSL integration.

16 LDAP Configuration Wizard

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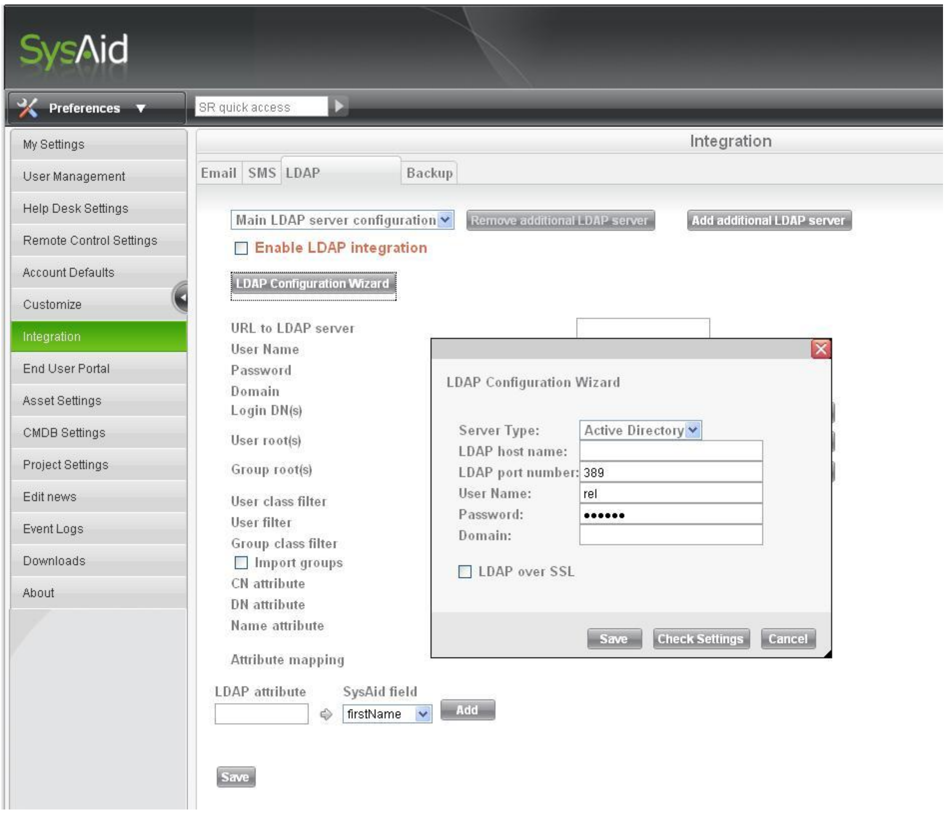

Click **Check Settings** and then **Save**. If you receive an error message verify that you have not made any spelling mistakes. In case the error message persists, please send the error message to SysAid support.

4. If you successfully saved your settings, complete the main **LDAP Server Configuration** page with all the required fields. Check the box "Enable LDAP integration" at the top of the page.
5. Click **Save**.

Using Two or More LDAPs

SysAid can be integrated with more than one LDAP compliant directory. This integration will mean that end users will have to add a domain name before their user name. Once you have integrated from one LDAP, click **Add** at the bottom of the page and complete the **LDAP Server Configuration** page with all the required fields. Click **Save.**

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Final Step - Integration

1. In order to integrate your users from your Active Directory into SysAid, go to **Preferences → User Management → End User Management**.
2. Click **Refresh User List from LDAP.** Check to see if your users were successfully imported. If you do not see all of your users, please contact Ilient support team.

When users are deleted from the LDAP SysAid will automatically mark them as disabled when it is auto-refreshed.

Scheduled LDAP refresh

You can schedule an automatic refresh from LDAP, on pre-defined intervals (once a day, once a week or once a month) according to your preferences. Go to Preferences → Integration→LDAP tab, and choose your auto refresh settings.

Single Sign on

Single Sign On has great benefits for your users. Once a user has signed on to their network at the start of the day, no further login is required for SysAid. You bypass the login screen. To set up this option please contact support@sysaid.com with the following details: Your LDAP compliant software (version number), and whether you have IS integration.

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Importing and updating users and companies form a CSV file

In case you do not use LDAP integration with SysAid, you can import both users and companies form a CSV file.

Go to: **Preferences → User Management→**
Import Users or **Import Companies** tab

In this page you need to set the different columns in your CSV file to suite the parallel fields in SysAid.

Since the username has to be unique for each user in the system, it is recommended to set the email address as a username.

When importing users, if SysAid recognizes in the user field a company name that is not yet registered, SysAid will automatically add this company to your list of companies. In addition, if you import another CSV file with other users from the same company, SysAid will automatically register all the relevant users under the same company.

However, for the department field, or any other customized list field, SysAid will not create new text values, and therefore you need to make sure all the text values in your CSV file are paralleled in SysAid. If a new value which does not exist in the field you have customized in SysAid appears in your CSV file, SysAid will ignore this value.

For instance, if you have set your department list in SysAid to include the following departments: *Management*, *Marketing*, and *Support*. Yet, in the CSV file there is also a *Development* department value, SysAid will ignore this value.

To fix this, simply set a new department value: *Development*, and then upload your CSV file again. SysAid will automatically scan for fields that need to be updated, update changes and insert new information.

To set the *Development* field in your *Department* List go to:

Preferences → Customized Lists tab.

From the List dropdown menu choose your list (for example, *Department*), and insert a key number and a caption: *Development*. Click **Save**

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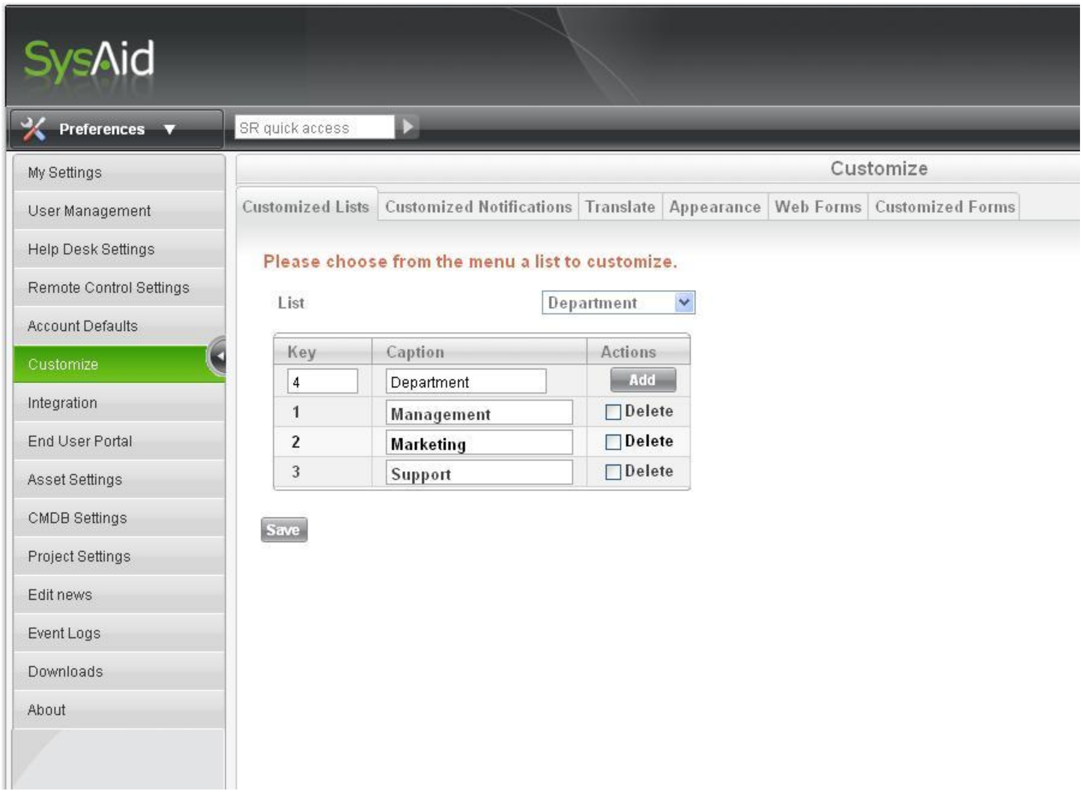
Now, import again your CSV file. SysAid will scan for the fields that need to be updated and will be able to recognize the text value “Development” for the department list. So, SysAid will add the information regarding this department while importing the CSV file.

17 Adding a department to the Departments list in SysAid



You may also import administrators and end users from a CSV file under Preferences→ **User Management→ Admin/End User Manager→ Import Users** tab. If you wish to direct SysAid to re-perform the import of users during specified intervals, check the box below the table to schedule an import. Insert a start time, or click the calendar icon  to choose a start date for the scheduled import. Choose from the dropdown menu how often you wish SysAid to perform the import, and specify the path of the Excel file which contains the users data. Click **Save Fields** to save your preferences, and **Submit** if you wish to perform the import immediately. Note that by importing users you can also update all the fields for the existing users.

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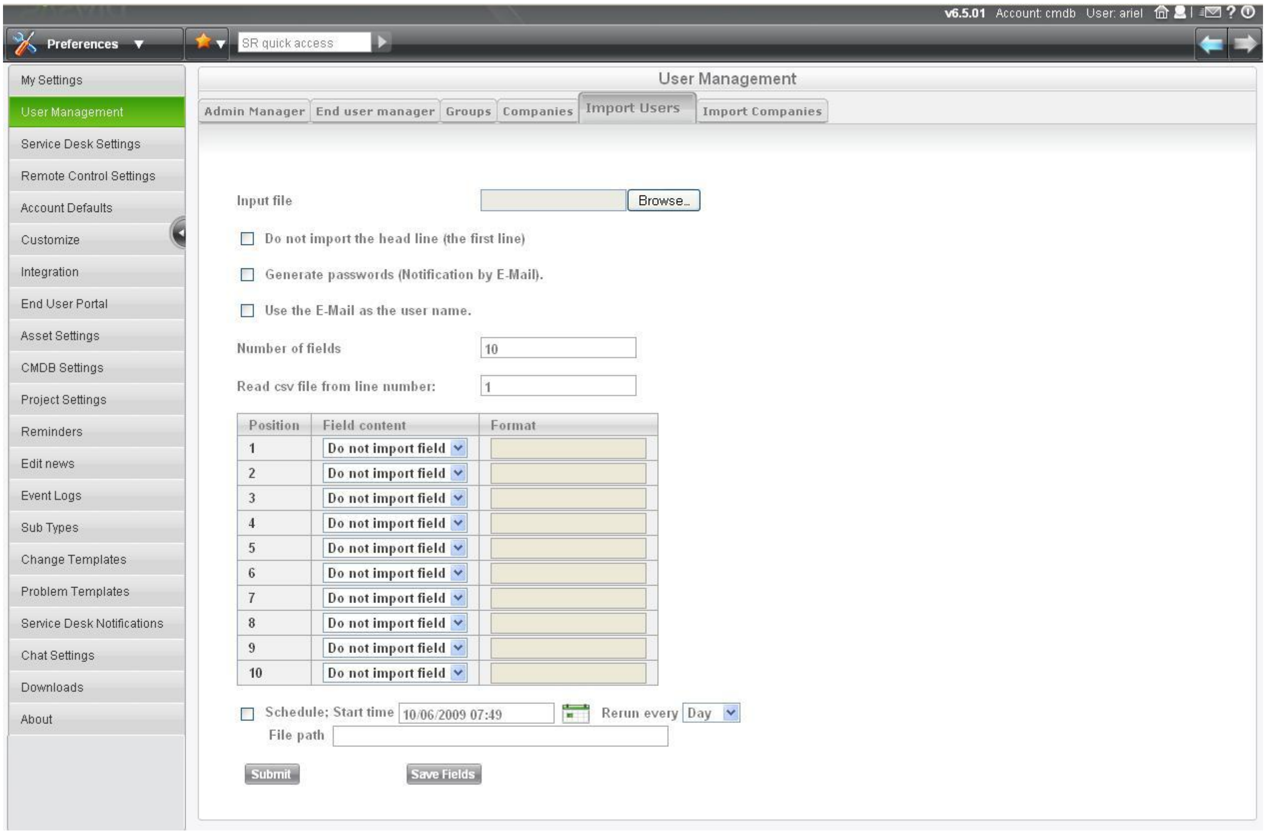
18 Import End Users from CSV File



Administrator/s- The Main Administrator

During the installation process of SysAid you were requested to enter details to setup your first Administrator. This user is referred to as **SysAid Main Administrator**.

In extreme cases where you do not have an access to SysAid, you may use the included utility to reset this main Administrators password and this will allow you access.

It is recommended not to delete the SysAid main administrator, although you may disable it for licensing purposes.

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Create Administrators

Following a fresh installation of SysAid, and after completing LDAP integration, all users can be viewed in the **End User Manager** tab. No administrators exist apart from the main administrator at this stage. Therefore only one entry will appear in the **Admin Manager** tab. **Administrators** are authorized to manage assets, change settings, and respond to service requests. You should now create your administrators.

1. Go to **Preferences→ User Management → Admin Manager**.
2. Click on the "Turn end users into administrator" button.
3. A popup screen will appear. Click on the box next to those usernames whom you wish to turn into administrators.
4. Or, if you know the exact username, type it into the caption box next to **Filter,** at the top of the page. Click on the box next to the name.
5. Now click the **Select** button.
6. These users will now appear on the **Admin Manager** page, which indicates that they are administrators.

Change end user account information when integrating from a single LDAP.

End users with a username and password in SysAid can submit service requests. The interface they interact with is the **End User Portal**. Alternatively, they can submit their requests via an email account. If you do not use single sign on, your SysAid users can login to SysAid by employing the same username and password they use to access the network. In order to change account information imported from LDAP, for example, password or add a new user, you can change this information in the Active Directory.

1. In SysAid go to **Preferences → User Management → End User Manager** tag. Click on the **Refresh from LDAP** button**.**
2. Once you have refreshed from LDAP, perform a quick check of the end user entry to ensure that the changes took effect.

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Change end user account information - when using two or more LDAPs or when having moved to a new LDAP.

If you have moved from one LDAP to a new LDAP or have two or more LDAPs set up (two or more domains), and after you have made changes in the Active Directory, before pressing the **Refresh from LDAP,** you should delete all end users in SysAid.

1. Go to **Preferences → User Management → End User Manager**.
2. Click Toggle All, and on the top menu bar click the **Delete button** 
3. You can now click **Refresh from LDAP.**
4. You will have to create your administrators again if this action does not follow a fresh installation of SysAid.
5. Users will login to SysAid using the following construction: domain/username

SysAid Licenses

First, to verify that SysAid is successfully integrated with your LDAP complaint directory, count the amount of users in your directory. You can see your license details under **Preferences→About**. Count also those users who appear in SysAid, irrespective of the status (Disable). The bottom of the page will state how many records you have. If these numbers are not the same, please contact Ilient support.

SysAid counts the number of users imported from LDAP and reconciles this with the number of licenses purchased. Following integration with LDAP, SysAid duplicates the information in LDAP. SysAid keeps a list of users and their information. To check username and passwords and to maintain information on users, SysAid checks with your LDAP compliant directory.

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In SysAid you have the option to **Disable** users so that your number users will equal the total number of licenses you have bought. When you disable a user, what in effect you do is make a note to SysAid not to take this user under consideration while counting license numbers, and not to update this user's information. The disabled user will still be listed under your user list but will not be counted, and cannot login to SysAid.

Do not use the **Delete** options to disable users following LDAP integration. If you delete an end users from SysAid, when you **Refresh from LDAP**, this user will appear again, because SysAid does not have a way of differentiating between new and deleted users. In other words, SysAid does not know if this user was listed once and was once deleted and therefore should not be imported again.

Therefore, it is preferable to mark to SysAid all those users that do not need access to SysAid as **disabled**. They will still show up under your end user list, yet, you make a note to SysAid to ignore the disabled users when counting licenses.

If you do not ensure that numbers of licenses = end users plus administrators and **managers SysAid will automatically** and randomly disable some accounts, so that the quota of licenses can accommodate the amount of users in SysAid.

Disable End Users

1. First view all end users imported into SysAid. Go to **Preferences → User Management → End User Manager**.
2. To **disable** an end user, click the check box next to the user name.

3. In the top menu bar click the **Disable** button . The page will refresh and in the column titled "Disabled", **Yes** will now appear.

Even if you "**Refresh from LDAP**", the disabled end users will remain so in SysAid.

Support and upgrade information

Under **Preferences→About** you can see the statues of your SysAid maintenance and verify it is still valid. You can also check the amount of licenses for your assets, end users and administrators.

Check how many enabled users you have in SysAid.

This can be preformed after you have purchased a certain amount of licenses. In order to perform a number check on the amount of active users you have in SysAid, you should use the filter option. Once you have disabled end users, you can check for the total amount of active users.

1. Go to **Preferences → User Management → End User Manager**. Click on the Filter icon .
2. The Query Builder screen will open. In the **Choose Element** dropdown box select **Disabled**. In the last box (the Yes/No dropdown box) select **No**, for a list of enabled end-users. For a list of disabled end users select **Yes**.
3. Finally click on the **Create This Filter** button.
4. The **End User Manager** page will appear and show the results of the filter.
5. To print the results, right click on your mouse; select **Print** from the menu.
6. Click on the **Filter** icon again and then click the **Reset Filter** button. If you do not reset the filter, the **End User Manager** page will permanently retain the filter settings.

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7. To have both disabled and enabled end users in one file you can export the results to Excel. Click on the **Export to CSV** icon. You will end up with two Excel files, one with disabled users and one with enabled users. For your convenience, you can cut data from one file and paste it into the other for easy viewing.

Finally if you discover that the number of users does not match the enabled amount, check if any LDAP/AD accounts were locked in LDAP/AD, and may prevent refreshing the user list from LDAP. After the procedure is done, check if the users you have enabled can login in to SysAid.

If you will have more users logging in to SysAid than the license agreement allows, and require more licenses, please contact our sales department sales@sysaid.com

Additional AD/LDAP Options

For further information on Novell LDAP servers or Open LDAP, please contact us for instructions: support@sysaid.com.

The SysAid Audit log can be accessed from within SysAid interface. The SysAid Audit Log allows you to filter information, as well as perform a search. Also, the user login failure information is recorded in the Audit log.

Go to **Preferences→ Event Log** to see and search your information.

On top of the automatic events that are entered in the event log, whenever a change is made in SysAid main settings by an administrator, SysAid requires a note to be entered and records the date, the time and the user who performed the changes in the event log. You may choose to enable or disable this feature under **Preferences → Account Defaults**.

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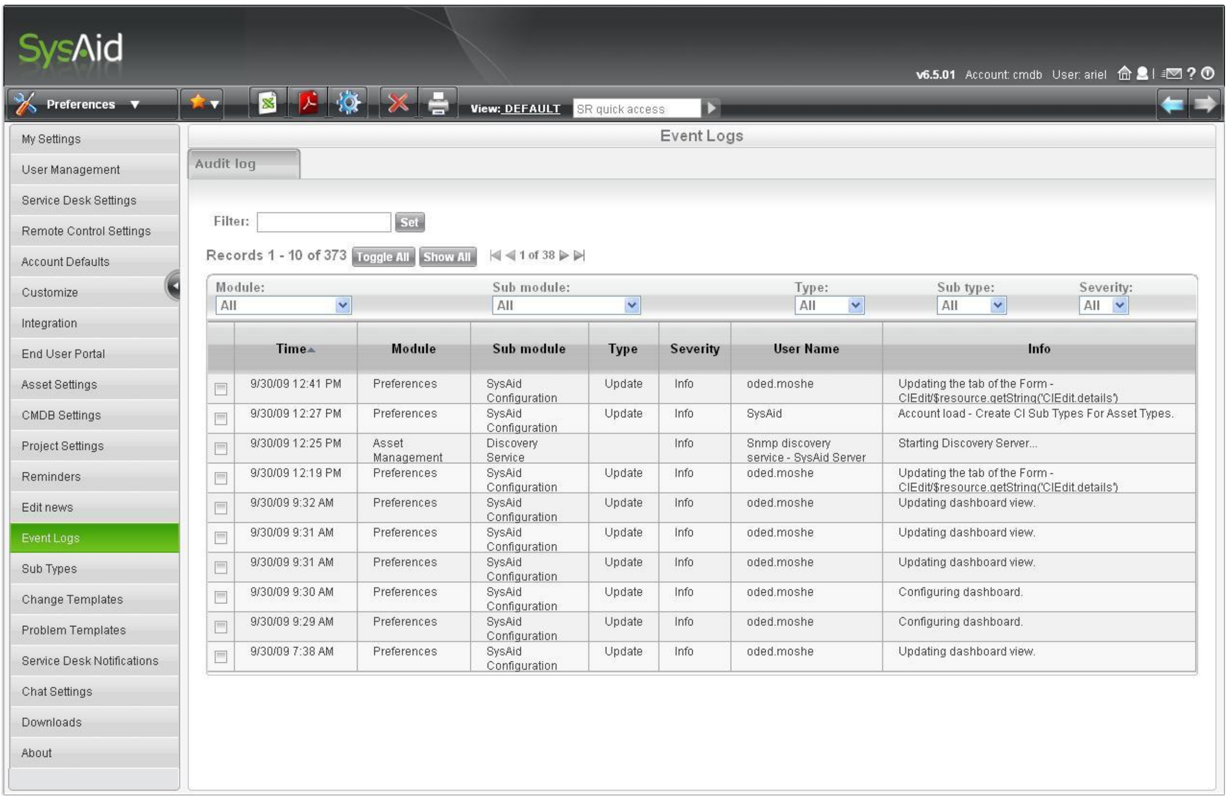
19 Audit log



You can manually add a custom event when needed. Click the **New** icon, and use the form to manually update your system with events that are not automatically monitored. Use the dropdown menu to select the severity of the event- either information or an alert. In the text box, specify the details of the event, and click the **Save** button. The event will be added to your event log.

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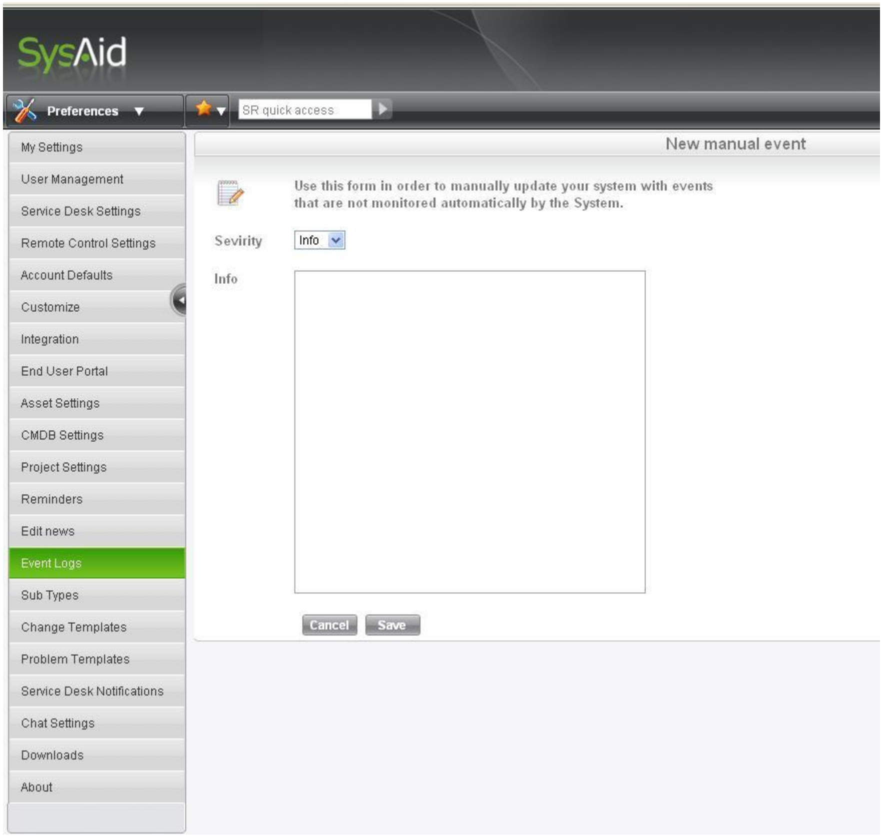
20 Add manual event



SysAid automatically creates an end user

When a user submits a service request from a computer which does not have a user already registered with SysAid, SysAid can automatically add that person as a new user.

1. Go to **Preferences → End User Portal.**
2. In the **End User Portal Settings** page you can enable the following box:

☐ When a Service Request is submitted from an asset, automatically create a user account for the user of this asset, if no such account already exists.

Now, an end user submitting a request from SysAid interface will be added as a new user by SysAid.

This option is not applicable if you are using Active Directory or another LDAP compliant software.

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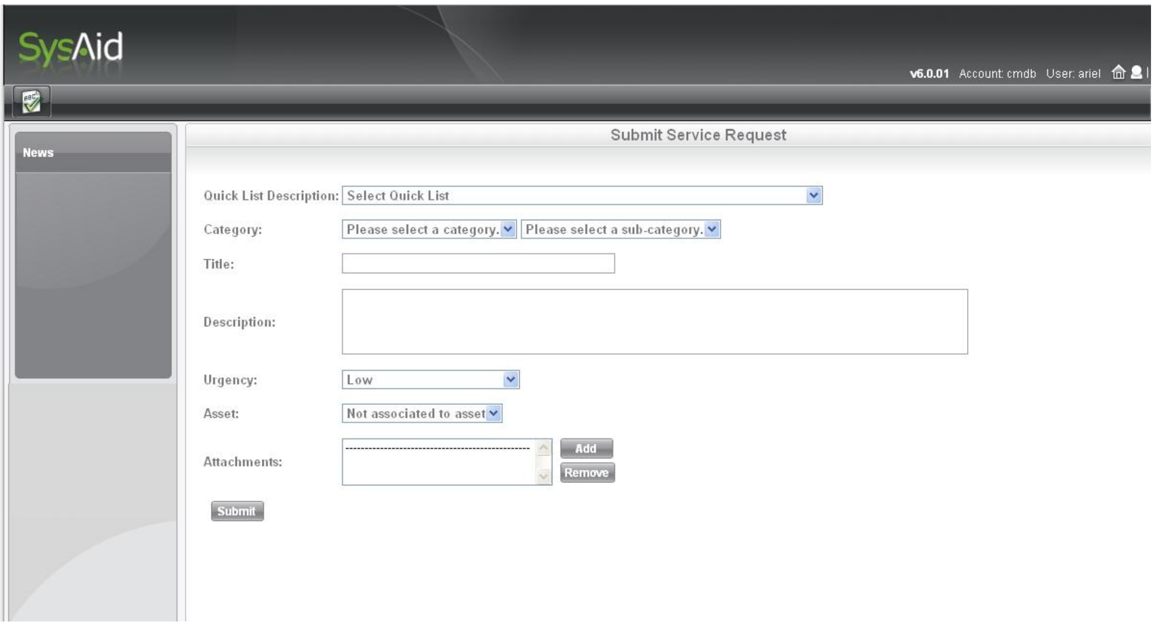
Chapter 4 Help Desk - An Overview

4.1 The Help Desk Interface

The Service Request

A service request is a form that details the end user's request for support from the IT Department. Often it describes a problem, for example, trouble with hardware or the failure of a printer to function. The main way an end user can submit a service request to SysAid is via the end user interface. The end user accesses this form by pressing the hot key (F11), he/she fills out the form and then clicks the **Submit** button. The end user will then see the **"Thank-you"** page with the number of the service request he/she has submitted.

21 Submit Service Request Form - end user interface



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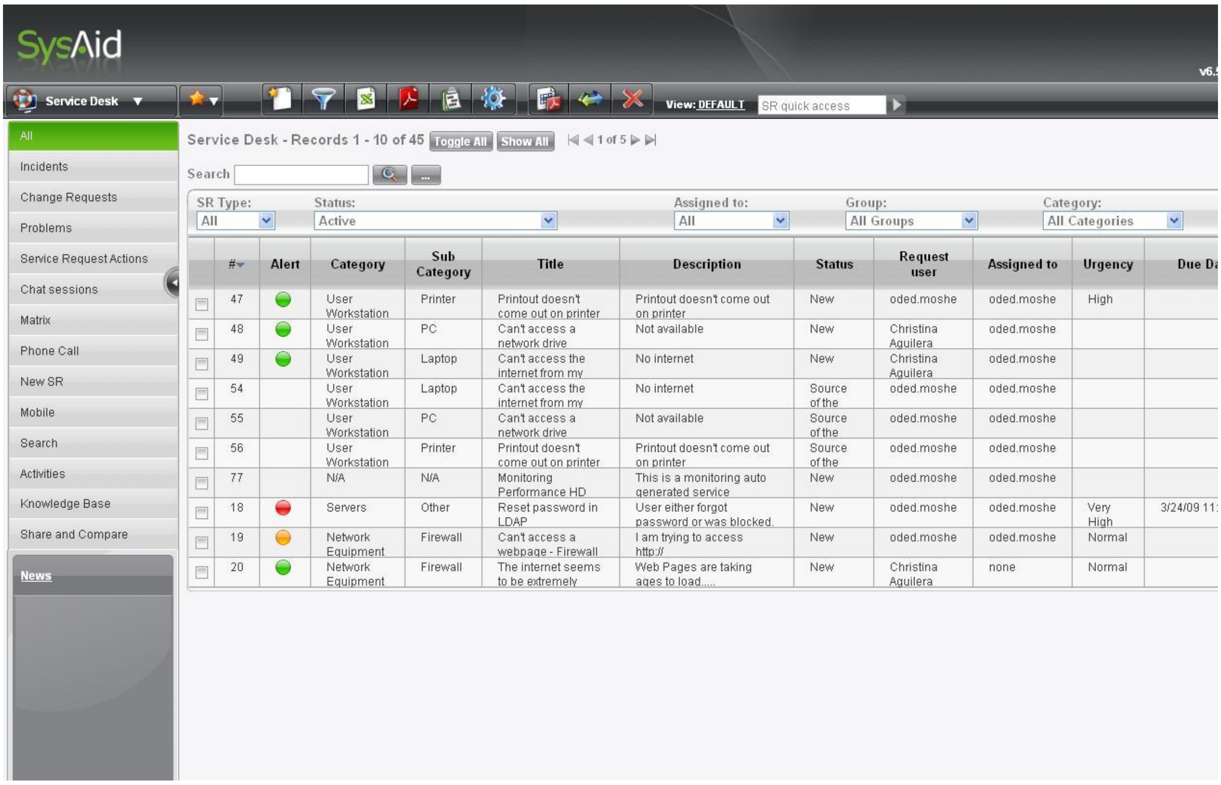
After the administrator logs into SysAid they can easily preview all service requests that require a response by clicking on the **Help Desk** from the sidebar menu. Alternatively, the administrator can also view only a selection of the service requests list, by activating one of the six filter menus located above the list (Status; Assigned to; Group; Category: Urgency and Priority).

22 Service Request List



Click on any row entry to open and read a service request. As a result, the **General Details** page (Figure 18) of that particular service request will be displayed.

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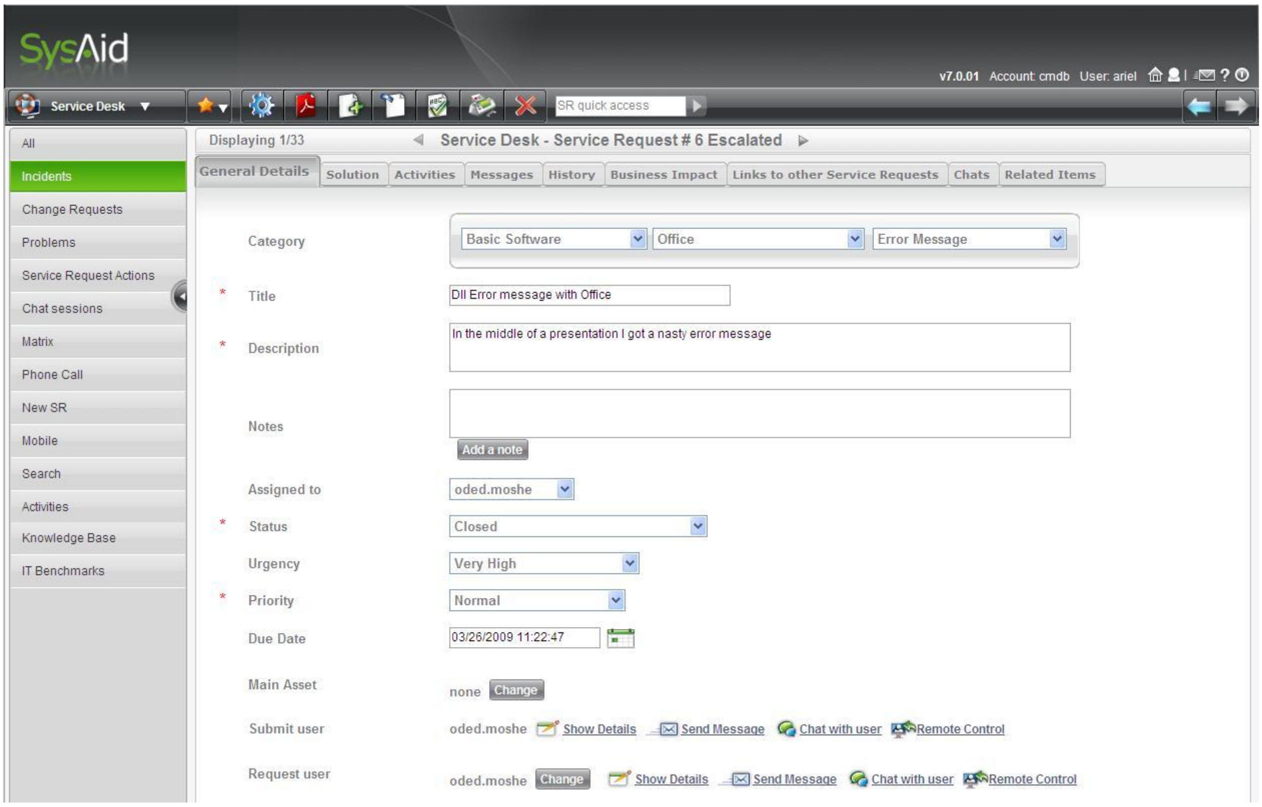
23 General Details of a Service Request



Under the **General Details** page you can see the title and the body of the Service Request, the dates of all correspondences relating to this request, its category, priority, who it was sent to, the general details of the submit user, and various other details. You can browse between the Service Requests in your helpdesk list by clicking the Next/Previous arrows next to the title of the current Service Request.

The General details form of a Service Request can be customized to include more suitable fields. To learn how to customize a form in SysAid, look at chapter 7 **Advanced Configurations**, under **Customize the form** in this guide.

You can edit the user to whom the request is assigned, by selecting the name of the user form the dropdown menu or the More popup Users list. You can also select the administrator group to whom the service request is assigned. When you change the administrators group, SysAid will automatically show in the Assigned to dropdown menu only administrators that belong to the new group

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you have selected. To enable this option go to Preferences→ Service Desk Settings→ General Settings and check the box .

From this page you can also turn the service request into a FAQ for your end users Self Service Portal, or a knowledgebase item, for other administrators. It is advisable to use this option in order to save time and effort. Service requests that tend to repeat themselves can be added to the list of frequently asked questions, to allow your end users to independently solve their problems, and at the same time be stored in your knowledgebase, so your administrators team could refer to it in the future.

You can also Upload and download items from the community to your local SysAid with a simple click!

http://ilient.com/Sysforums/forums/sysaidinterfaces.page

Each service request within SysAid contains a portfolio of information, which is divided into six pages. Each of these pages can be viewed by clicking on the named tab: **General Details, Description, Solution, Activities, Messages** and **History.** Tab names can be changed; tabs can be removed, or you can add your own new tabs. To learn more about creating new tabs, please check chapter 7 in this guide, under: **Create a New Form Tab in the Help Desk Interface using the Customize icon**

Following is an explanation about each of these tabs.

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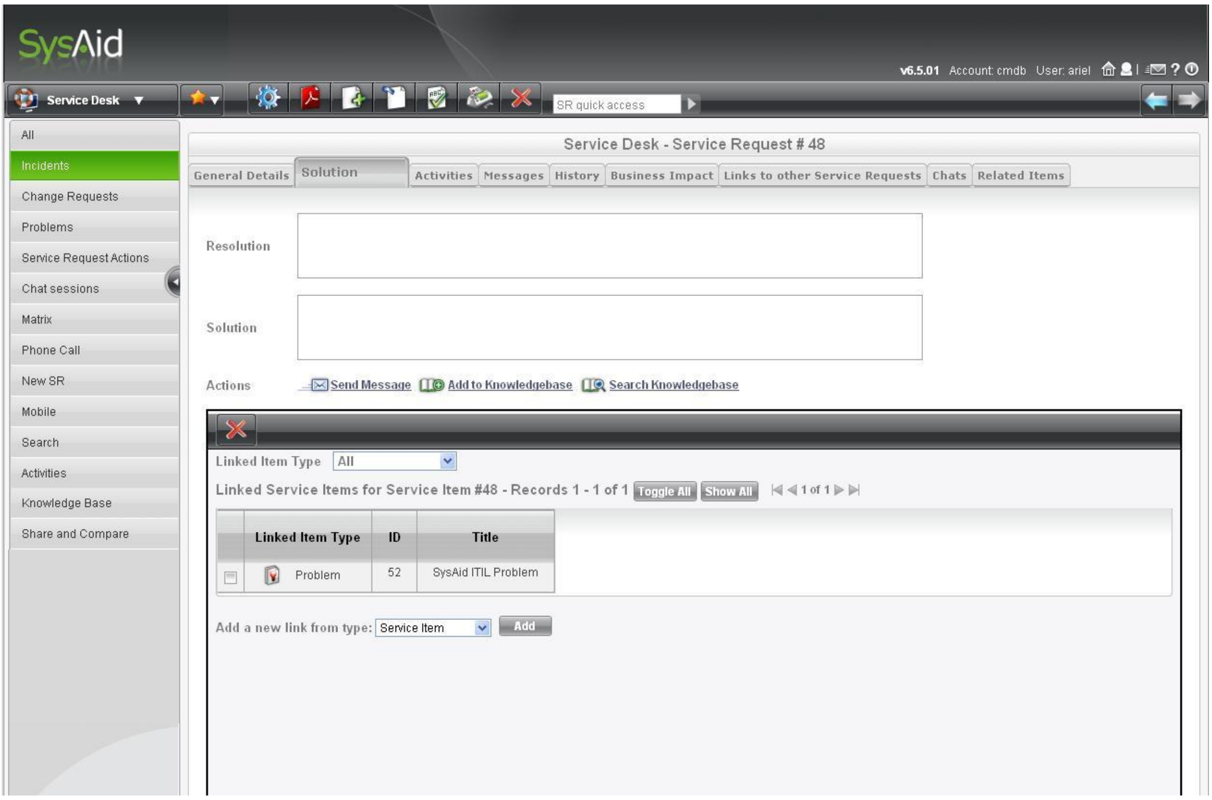
Solution Tab

24 The Solution tab

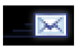


This screen provides two free text areas: **Resolution** and **Solution**. These can be used by the administrator who handles the service request. As resolution, write the cause of the problem. In the Solution text area, describe how to fix the problem. These fields, too, are significant in searches.

If you click on the **Search Knowledgebase** link, SysAid will search for service requests with similar details. You can use the other links to send a message to the request user, or to add this service request to your knowledgebase.

Next to the request user and the submit user names you can see a few icons that allow you to perform various actions:

Click the Show Details icon  to see and edit the full details of the user in a popup screen.

Click the envelope icon  To send a message to the user.

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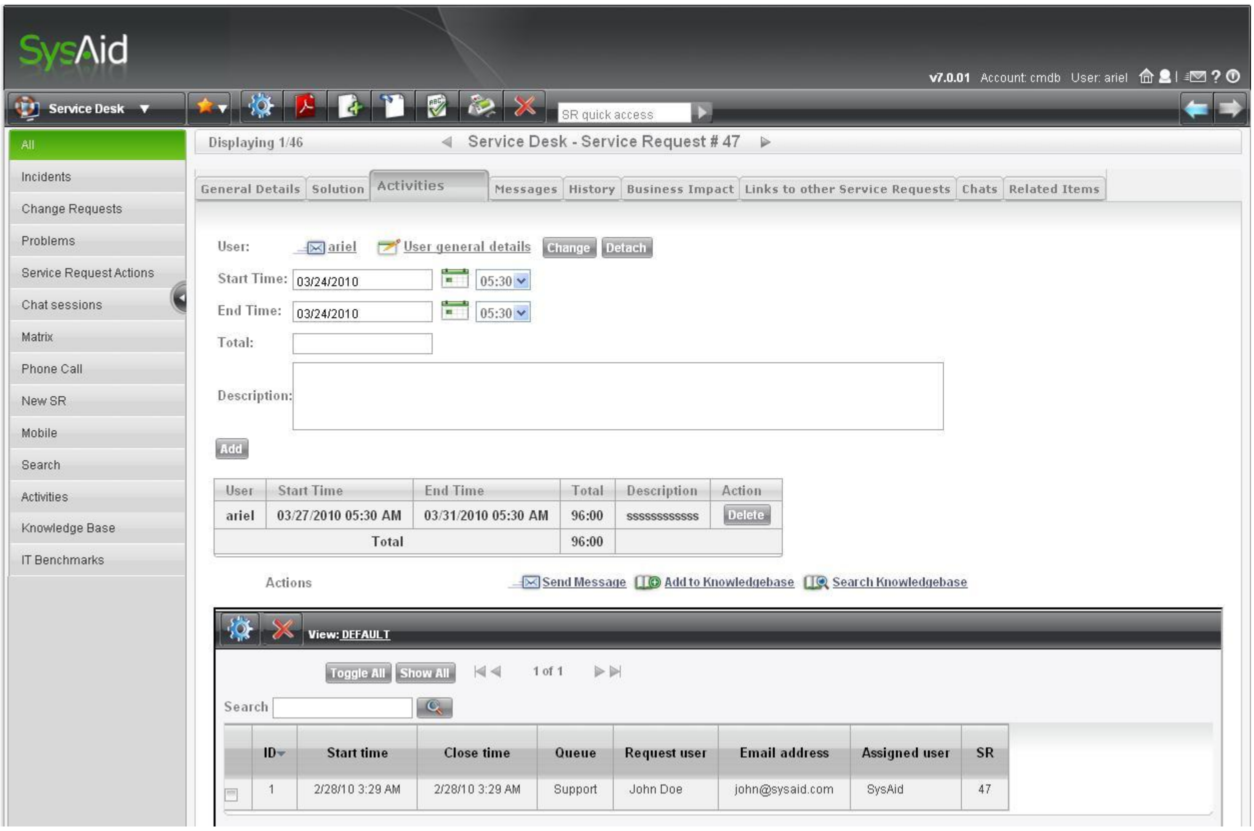
Click the Chat icon to initiate a chat session with the user. 4818 While chatting, click the paper clip icon to send an attached file.

Click the icon to perform a remote control with the submit user or the request user.

Activities

On this screen, an administrator can record the hours spent on a particular service request. For each session of your work enter the Start time and End time. The amount of time spent is calculated automatically by SysAid. Provide a description of the work carried out and click **Add.** If a chat has an attached service request, the chat can be logged as an activity in that service request. The activity start time is when the chat is accepted, and the activity end time is either when the chat closes or when the administrator releases the chat. (See Preferences → General Settings to enable this option.)

25 Service request activities tab with an attached chat session



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Messages

Under this tab you can find all the messages sent and received regarding the service request in question. The messages are automatically time-stamped by SysAid.

You can decide whether you wish to see the automatic notifications related to this service request or not. SysAid is able to distinguish between messages and automatic notifications, and you can see them separately by clicking the button **Show/Hide automatic messages**.

All outgoing and incoming emails regarding a specific service request can be found under the messages tab. In order to see them, you need to make sure you have sent emails from within the service request. Then, all the outgoing emails you have sent to end users, and all their replies to you, will be listed here. To learn more about configuring incoming email messages, please check in Chapter 7 in this guide: **Replying to Service Requests**

History

The **History** screen supplies the record of a particular service request. The creation of the service request and every change made to it since, are documented here. The user who created or changed the service request, and the time he/she did so are also recorded on this page.

Related Items

Under the Related Items tab you can view and edit all the items related to this incident. A table with a list of related items is presented at the bottom of the

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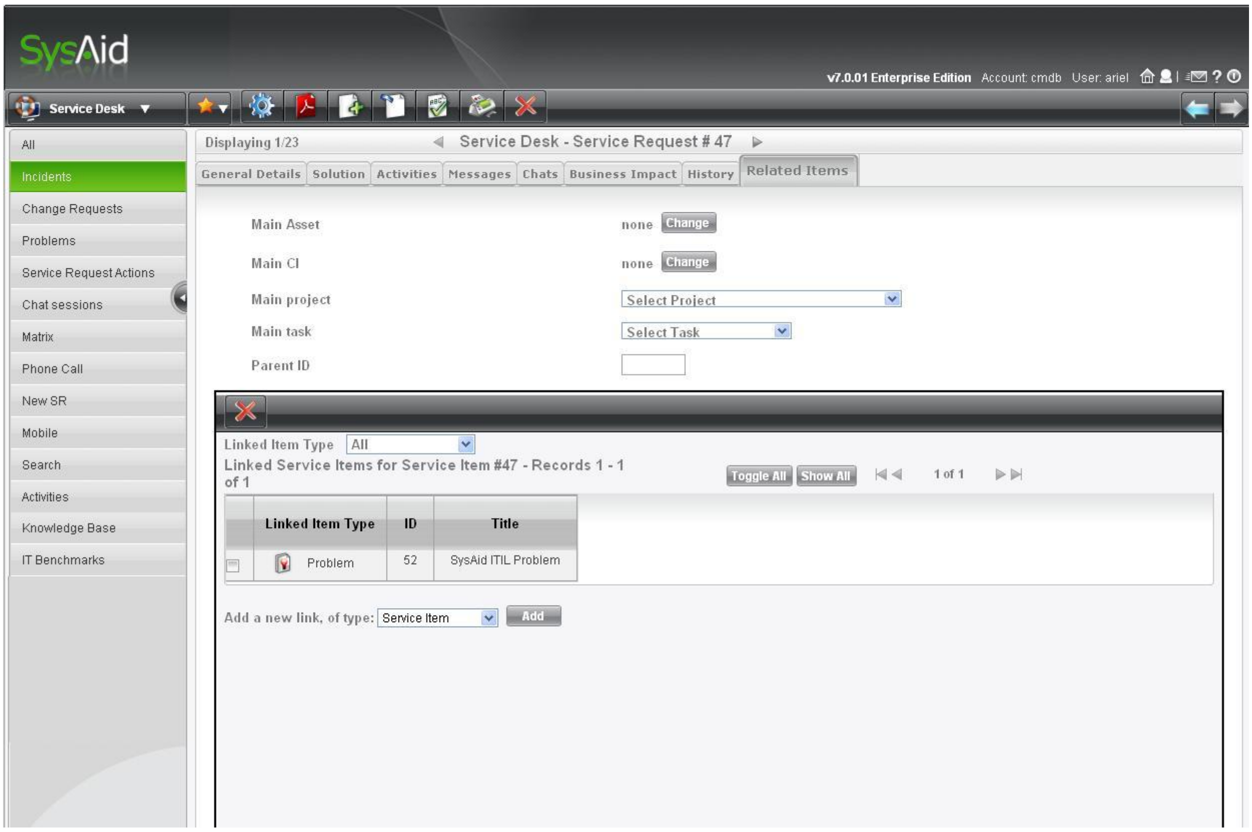
page. At the top of the page, you can create a new link to a main item, by selecting form your lists. The main item is directly influenced by the issue in the incident, and the other items are connected to the main item, and are expected to be influenced vicariously. To add a linked asset or a linked CI attachment, click the Change button and make your choice from the popup screen. Use the dropdown menus to select a project or a task to link the incident to. In case you wish to link this incident to another incident, insert the ID of the service request in the pane.

Click OK/Apply to save your change.

The main item will appear in the table on the bottom of the page.
To create a new link to an item that is not a main link, choose from the dropdown menu in the frame, "Add a new link, of type:" and then select form the popup menu the item you wish to link the incident to.

26 Edit the related items of the incident



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Creating Hierarchies

You can create hierarchies between service requests by inserting the 'Parent ID' for a service request, which will define it as a child request of the request you have specified. This will mean that the status of the parent request will influence the status of the child requests, and you will be able to see the connection to the child/parent requests from within any of these related incidents. When closing a service request that has child service requests, the solution field will be copied from the parent to its child service requests.

Locating Service Requests: Four Options

Before you can solve service requests by inputting a solution and resolution, you should locate them. There are several ways to locate service requests in SysAid.

- **List**

Help Desk → List

Click: **Help Desk → List** to open the service request. The service request list is comprehensive; it includes all the service requests that exist. By using one or more filters, however, you can restrict the list to what interests you. For instance, by clicking on the **Status** dropdown menu, you can review different lists of service requests divided according to the status. To open any service request for editing or rerouting, click on the row entry of that relevant request.

- **Matrix**

In the sidebar Click on **Help Desk → Matrix.** The **Service Request Matrix** page will open; you can view various tables that present the number of requests in aggregate. Clicking on any number will leads you to the requests themselves. To create a matrix, choose a horizontal field and a vertical field. The matrix will display the number of service requests matching both fields. You can filter

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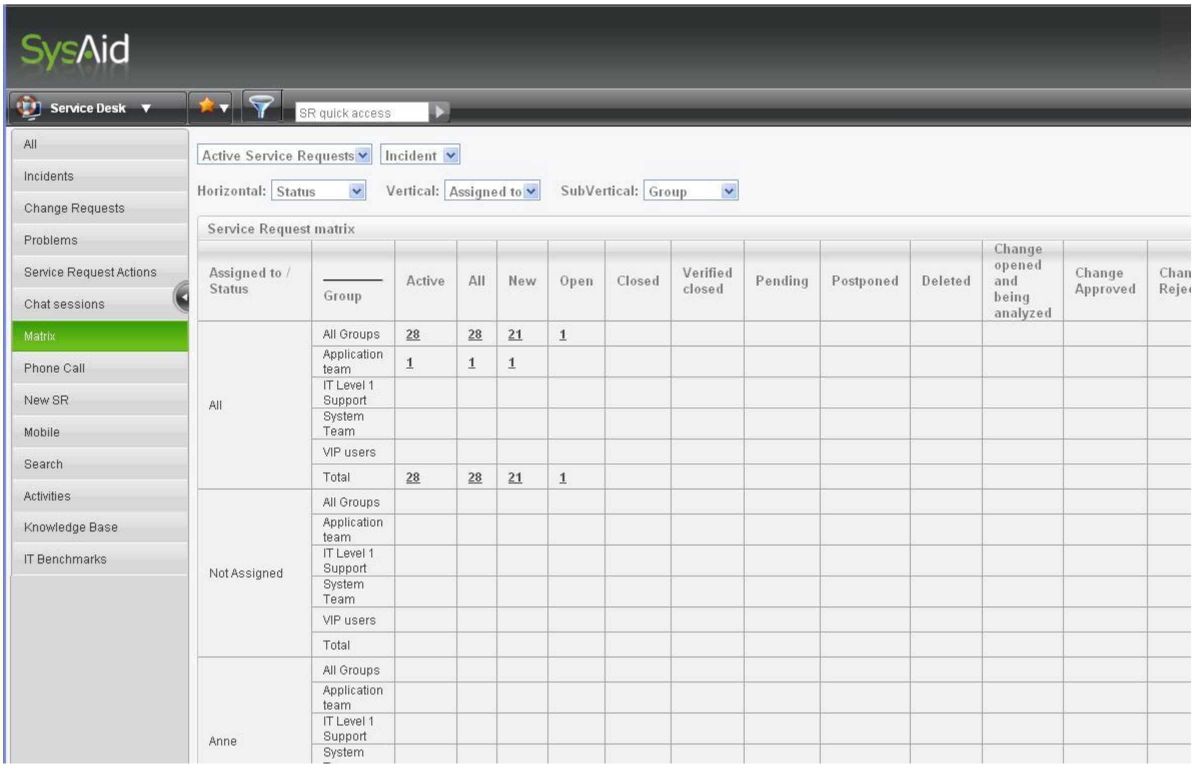
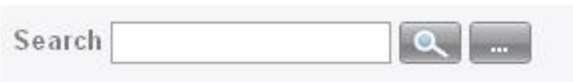
the matrix according to your service desk variables. Click the filter icon and use the dropdown menu to build the filtering expression.

27 Matrix view of SysAid service desk



- ### Search

For searching the Helpdesk and the Asset lists, you can use the search window at the top of the list page.



Note that in the helpdesk list you can use the three dots button to limit your search for specific dates. Choose the start date and end date of either the time the request was sent, or the time in which the request was modified. Note that you can perform a search on any of the columns in any of the SysAid lists: service requests, contacts, assets, and more. The columns in which the expression you have searched for appear will be marked with an asterisk (*).

When you wish to perform a search on your database, click on **Help Desk → Search** in the sidebar. Here you can search for specific service requests. Into

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the search field, enter part or all of the text that might appear in the title of a service request, its description, category, or any other field. The search is not case sensitive and punctuation marks are optional. After you click **Search,** a screen will appear with any matching service requests, best matches first. By default, only the knowledgebase – a group of especially important service requests – will be searched. You can search through all service requests by choosing the appropriate button.

Boolean logic is possible. The default is "Or". For "And", place "&&" between the words. By default, the search will find service requests that match any word you supply, not necessarily them all. To locate service requests that necessarily match two or more words place "&&" between those words. Placing quotation marks around two or more words is equivalent to placing "&&" between them.

- **Quick Access**

To access a SR by its ID, use the quick access box, available at the top bar of any page 

Click the question mark icon for the Help files to learn about performing more complex searches.

Duplicating a Service Request

In some cases it is very useful to be able to duplicate a service request. For instance, when an end user sends a service request specifying two different problems. Let's say that the end user's screen flickers, and his mouse is broken. These are two different issues, that might have two different priorities and different due dates, but they were sent in the same service request.

You will need to create a duplicate and address each of the issues separately.

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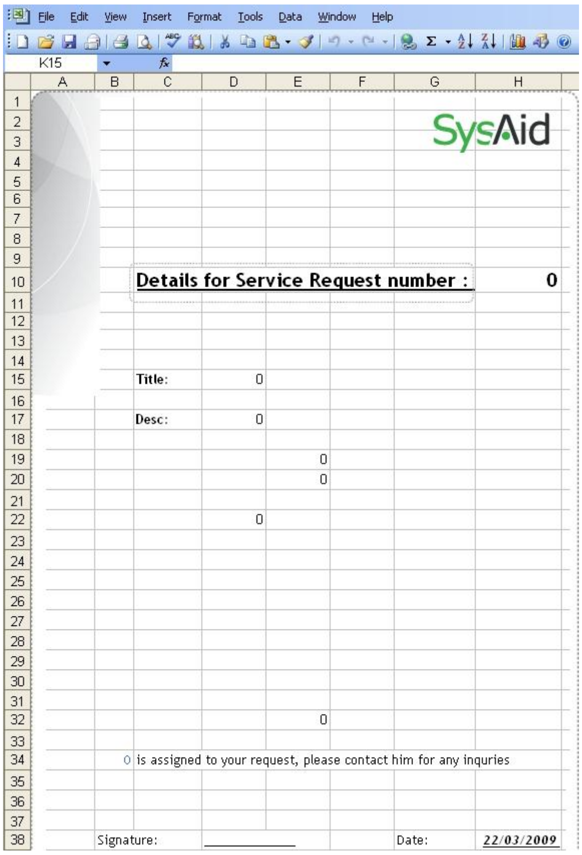
To create a duplicate, simply click the **Duplicate** icon from any of the service request screens. You can easily delete a service request by clicking the Delete icon at the top bar.

Customized printout

This feature enables you a wide range of customizations you can perform on the printout of a Service request, it uses an Excel sheet that you can customize to your needs (Fonts, colors , size, logos etc…) and merges it with selected data in the Service request.
In the installation directory under
C:\Program Files\SysAidServer\root\WEB-INF\conf\templates
you can find an XLS file: customized_printout.xls
This file is the default template used for your customized printouts.

28 Customized Printout Excel File



To merge the data in the service request to your customized printout, click the  **Customize Printout** icon from within the service request.

SysAid will check what tab you are in, and check the directory to see if there is an XLS file with the name of that tab. Note that spaces in the name are omitted.

If SysAid can find a XLS file with the same name of the tab, it will use the tab and xls file to perform a merge between the fields you have selected, and your Excel template.

If SysAid cannot find a matching template, SysAid will use the default XLS file (you can see in the screenshot above) and merge it with the cells under the customized printout tab you are in.

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As long as you name your XLS templates and locate them appropriately, you can manage as many templates as you wish. You can activate your different templates by clicking the icon under each tab in the SR.

You may change and adapt the default template, too. Your modifications will be saved for future upgrades of SysAid. New templates will be provided in future SysAid upgrades, under new names.

Favorites

To be able to easily and quickly reach any page in SysAid that you need more highly available, you can add the page to your SysAid favorites menu, simply by clicking the star icon at the top bar of that page screen . A popup window opens, asking you to insert a caption for the favorite page, and specifying its URL. Click 'OK/Apply' to save the page as a favorite.

4.2 SysAid Help Desk - How to optimize your work flow

Help Desk provides a single point of contact for employees and customers for their IT problems. It is set up to facilitate the restoration of normal operational service with minimal business impact and is the place where vital day-to-day communication takes place between users, IT support administrators and third party support organizations (if applicable).

The Help Desk also functions as a repository of all service requests, tasks, or projects that have been issued in your organization. It is a knowledge base of what has been done and of all pending IT assignments. However, to obtain the most from help desk, you should first learn how the help desk organizes workflow.

Categories, statuses and priorities are important variables in SysAid. They can help you manage your workflow efficiently, by identifying those service requests that should be queued to certain sections, while at the same time flagging those requests that require a more rapid response. In addition, routing rules can be applied to incoming service requests. This is, in fact, a way of customizing the route a service request takes upon entering the help desk. Service requests that meet all the criteria of the routing rule simply bypass dispatch and go directly to the person or group stated in the settings.

You can also create settings in help desk to monitor or track the general status of certain service requests and then to instruct help desk to perform an action when a certain amount of time has elapsed, for example send an email reminder (according to the escalation rule, which will be elaborated on soon). There is also the option to use an alert system, which applies color filled boxes into your service request lists if the service request meets certain status, priority and escalation criteria. Moreover, you can set a deadline for handling a

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service request using **the Due Dates** feature, or set up timers (**Operating Times**) to monitor total response time of your help desk personnel.

Categories: In SysAid a service request has a Category and alternatively also Subcategories. The end user selects from a dropdown menu which category the service request falls into before submitting it to SysAid. For example a category can be Software, and the sub-category MS Office. When setting up the help desk, first consider what kinds of categories you want to have for your incoming service requests. These categories will serve to classify service request, and should therefore relate to your own in-house needs. A possibility is to monitor over a week the types of service requests you receive, and create a category coding list based on this information. Categories will help you to correctly queue and assign a service request to the appropriate administrator or administrator group, thus improving your workflow in SysAid. It is also possible to design different submission forms for your end users, according to the different categories you have set. To do this, however, some computer programming skills are required. Please contact SysAid Support, and our experts will be happy to assist you with creating different submission forms according to your categories. Setting up categories is described further in this chapter.

Statuses: The life cycle of a service request is presented by statuses in SysAid. A status describes the situation of a particular service request at that point in time. You should customize the statuses to reflect the stages service requests pass through until a final resolution is provided. For example **New, Open, Awaiting Response, In Process, Client Responded** and **Need More Information** are some common choices for statuses. Every service request that arrives into the SysAid Help Desk has the status **New** assigned to it. When an administrator opens a service request he can change the status to Open, or leave it as New and then queue it. You should decide your own local policy for changing statuses. Statuses are significant for calculating the time to respond for a particular service request. If the status of a service request is changed to **Open**

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before the responsible administrator has read it the time to respond can appear prolonged.

Priorities: A service request can be given a priority. For example, a priority can be High or Low. Priorities can assist in accurately targeting those service requests with a higher priority to receive a more immediate response and stand idle in the queue. This configuration will make your help desk responsive and sensitive. The administrator can change the priority after having read through the contents of the service request. In addition you can set a priority rule; this is linked to a specific asset or group of assets and is set up by the administrator. Once you have set up a priority rule, a service request will automatically display this priority. Therefore, it is advised to set priorities that are workable and meaningful.

Urgency: The end users select an urgency level for their service request. As a result, the selected urgency is displayed upon opening the service request in SysAid. When creating the **Urgency** menu, each option should be carefully thought out.

Routing: In SysAid there is a **Routing** option. You can set up **routing rules** that will direct service requests as they enter SysAid to one main administrator, or route them according to set rules to different administrators and administrator groups. Consequently, when a service request is received by SysAid and routing rules have been set up, the Dispatcher will not have to manually queue these service requests. They will be automatically queued or assigned to the responsible administrator.

All of the above fields are items that assist IT department in resolving a problem in as quickly as possible. In SysAid you can choose to set up timers (**Operating Times** tab) to calculate exactly how long it takes for a service request to be open until closure, or until response.

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Service Requests Enter the Help Desk

There are several routes by which service request can enter the Help Desk:

1. When an end user submits a service request via SysAid **End User Portal** he/she can select a category and sub-category that the request falls into. In addition he/she is also asked to set the urgency (Low, Normal, High, Very High, Urgent). Categories and sub categories should be set up by the administrator as soon as possible, so that the end user will be able to make a selection in the **End User Portal**.
2. Alternatively the administrator can receive a phone call requesting assistance. In this case, the administrator will open a service request in SysAid on behalf of the caller, by navigating to the **Phone Call** page, through the SysAid side bar. In this page the administrator places the request in a category and sets who it will be **Assigned to** and which **Admin Group** it belongs to.
3. The third available option is for a service request to be submitted from a customized html web page.
4. The administrator himself/herself can open a new service request by clicking on **New SR** in the side menu in the administrator interface of SysAid.
5. Finally, you can set up email integration (described later on); this allows end users, or even non-registered individuals to send an email to SysAid. SysAid will open the email as a service request.
6. Different notifications can lead to opening a service request. These notification can be configured in the Monitoring module, the Projects and Tasks module, or from the SysAid ITIL Package. The source of the service request will be then available under the control field names source. You can add this field to the list or form by using the **Customize** icon. To learn how to add a field by using the  **Customize** icon, please go to chapter 7 in this guide.

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Default Pathway upon Arrival into Help Desk

A service request can enter the Help Desk and wait for dispatch to read and queue it. Alternatively, however, it can skip dispatch, if **a routing rule** is in place. In this case the service request will be automatically directed to the administrator it is assigned to. In both cases the status of the service request is **New.**

Dispatch reads the service request, and using the **Assigned to** field moves it to the appropriate person or section for follow-up. At this stage the service request may still retain its **New** status, or it can also be changed to **Open**. Your in-house policy should determine when a service request status changes from **New** to **Open**.

Ideally, the IT department would like to resolve a service request problem as quickly as possible. In SysAid you can choose to set up timers (Preferences→ Service Desk Settings→ **Operating Times** tab) to calculate exactly how long it takes for a service request to be open until closure, or until response. If you want to check response times you should have a policy on what dispatch does to the status when it queues the workload.

Categories - Setting Up Categories and Sub Categories for Service Requests

When end users fill out the submission form, they select the category the service request relates to. Upon arrival of the service request, the Help Desk dispatch can change the category if it appears that the request has been allocated to the wrong category.

A service request in SysAid has a category (for example “software” or “hardware”), sub category (such as MS Office or printers), and (if the option is enabled) a third level category. Prepare a list of categories and subcategories

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that will cover the majority of the IT service requests. Here is a brief guide to setting up categories:

1. Go to **Preferences → Service Desk Settings**. Click the **Categories** tab.
At the top of the page, you will see a caption box for inputting a new category, and subcategories. To add a new category and subcategory, simply type the name in the caption box and then click **Add**. You may optionally add a brief description of what the category covers in the **Description Template**. Every time the end user will select this category the template description will appear in the service request. In case you wish a category to include more than a single sub-category, retype the name of the category in the caption box, and be careful to use the exact same spelling. You can also choose where the category will be visible: in your knowledgebase, your change and problem processes, simple incidents, and more.

2. If you wish to add a third level category, you need to enable this option in the **General Settings** page. *Note:* Go to **Service Desk Settings → General Settings** and check the tick box for **Enable third level categories**. Click the **Save** button. Now return to the **Categories** page to fill out the caption.

The categories, subcategories, and third level categories are saved in lines.

To delete a line, click the **Delete** checkbox next to it, then press the **Save** button at the bottom of the page.

Note that each line is independent on the others. Deleting one does not affect the others. In order to add several subcategories (2nd level name) within the same category (1st level name) you need to retype the category (1st level name) name once again on a new line and then the new subcategory name (2nd level name). Take care that you consistently spell category names (1st level name) the same.

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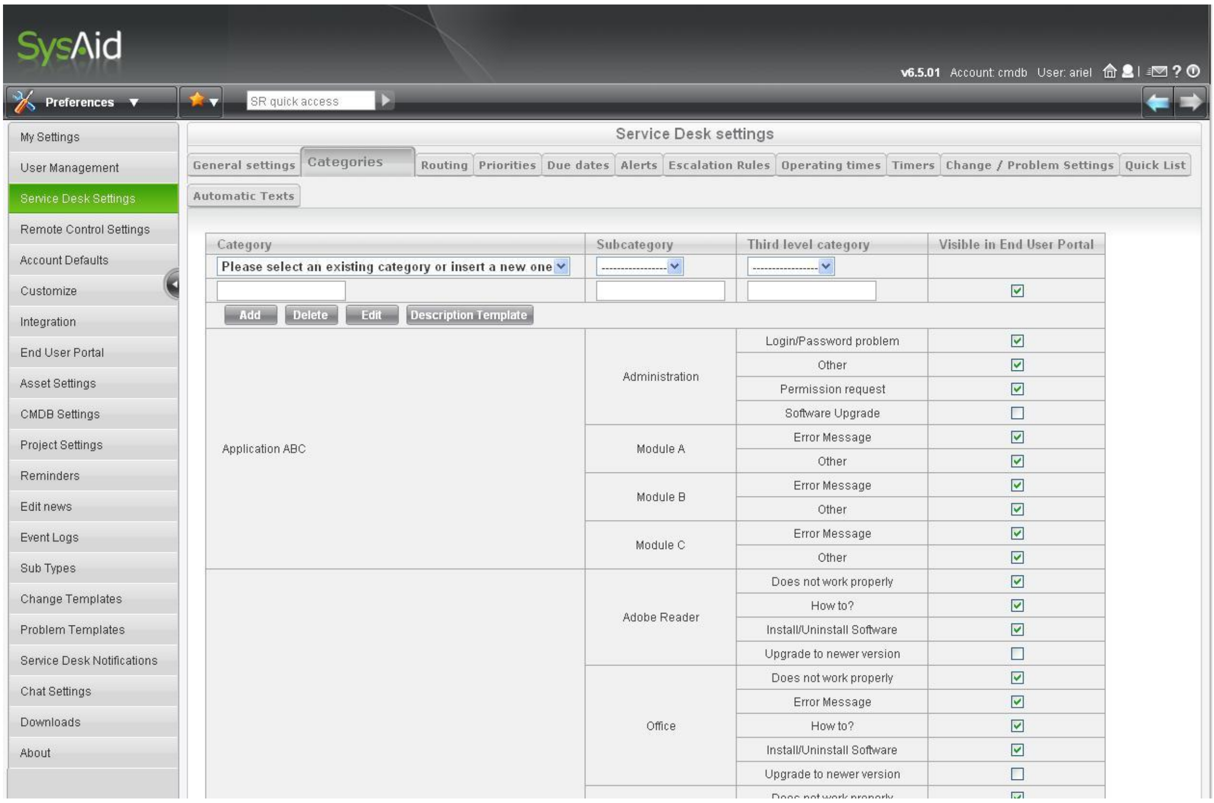
You can choose whether the categories will be visible in the End User Portal, by checking their boxes under the **Visible to End User Portal** column.

You can translate the names of the categories and sub categories into different languages. They will appear in the end user portal according to the users language.

29 Choose to show the categories in the End User Portal



SysAid comes with a default recommended category list to cover your day to day IT requests. You may use this list as a starting point and expand or reduce it to suite your services.

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Routing

In SysAid you can route service requests as they enter the Help Desk directly to a named administrator and/or admin group. If routing rules have been set up, the Dispatcher will not have to manually queue these service requests.

The Benefits of Routing:

- Saves Dispatch reviewing and queuing service requests.
- Delivered directly to the named administrator or admin group.
- Accurate queuing to named individual or group

Usually, the routing option does not do away with the Dispatcher. Somebody will probably need to check in SysAid for "New" service requests as some may not have a category or title, while others may have been sent via email or a web page. Also, some service requests may not fall within the routing rules. The Dispatcher will have to review new service requests and assign them or queue them manually to an administrator.

To use the routing feature in SysAid, you should have set up categories, administrators and end users, as described earlier in this guide. In addition, you should decide if you want to create one or both of the following fields: **Company** (optional) and **User Groups.**

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Brief Overview of Routing

To have service requests automatically routed upon entering SysAid you should make these changes in the **Routing** option.

1. To set up routing rules go to **Preferences → Service Desk Settings → Routing**.
2. Before setting up any routing rules you should have set-up:

- **Groups (end user and administrator)**,
- **Categories**
- If applicable **Companies.**

3. On the routing page there is a divider:

All fields located before the divider (Company, User Group, Category, and Subcategory) are what the helpdesk checks against every incoming service request. If the service request meets all the fields, it will route it to the Administrator and/or Admin group you have selected.

4. To set up who should receive the routed service requests, choose from the **Administrator** and **Admin Group** dropdown menus, which are located to the left of the divider on the routing page.

Most probably, even though routing may be set up, the administrator/s will still have to manually queue service requests not covered by the routing rule.

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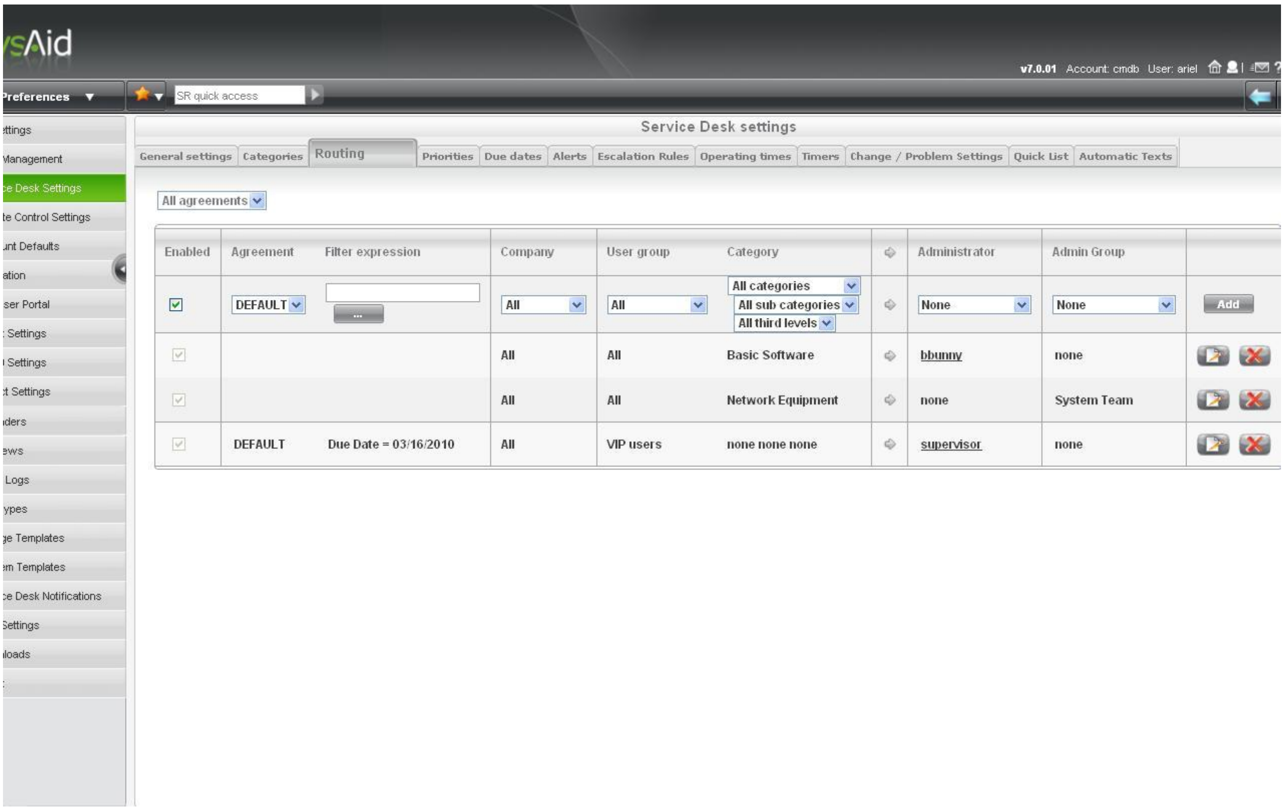
30 Routing page



Route All Service Requests to One Administrator

On a very simple level you can route everything to one person if you have one main administrator that will respond to all of your company's service requests, by selecting the **All** option for **Company, User Group, Category and Sub-Category**. Then select the administrator whom the service requests should be routed to. Finally click **Add.**

Companies – If your organization provides external IT services, you will need to set up **Companies.** Moreover, some IT administrators provide service to several independent groups. For example, different departments, or different clients who are outsourcing their IT management. To keep the inventory/help desk management separate without purchasing multiple SysAid accounts, you can create divisions within one account by creating Companies**.** Also, companies

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should be set up if you wish to nominate an end user as a company supervisor. To learn more about this option, please go to the Supervisors section in chapter 8 of this guide.

Go to **Preferences → User Management → Companies.**

1. To create new company click on the **New** icon, complete the company details, and then click **Ok**.
2. To now add end users to that company, go to **Preferences → User Management → End User Manager.**
3. Click on the tick box next to the users that you wish to assign to a company.
4. In the top menu bar click the button **Change company of Selected Users**. A small screen will open and using the **Company** dropdown menu, assign a company name to those users or user.
5. Click **Save**.
6. If in the **End User** page the Company column menu is missing, click the Customize icon. In the popup screen, move "company" from the available to the visible fields, using the arrow button, and then click **Save**. Now the assigned company will be listed.

User Groups – In the help desk you can set up user groups for administrators so that you can assign certain types of service requests to a particular admin group via routing. It is also possible to group end users. For example, you can set up groups for different departments, groups for individuals who use a particular computer or software, or groups for off site offices. Then you can assign the service requests submitted by a particular end user group directly and automatically to a named administrator in help desk.

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Creating User Groups

1. To set up a group in SysAid, go to **Preferences → User Management → Groups** tab. Here you can create departmental groups for administrators and end users. Here you can also divide users into logical units, then apply different rules for each group. There are three types of user groups: end user groups, administrator groups, and general groups (which include users of both types).
2. Click on **New Group** button.
3. The **New Group** screen allows you input a name for the new group, select its type, and add users from a list of available ones.
4. Select from the **Type** dropdown box the type of user. Move users into this group using the arrow tab. Create as many groups as needed.
5. You may check the **Enable Group Permissions** box if you wish to define special permissions for this group. Group permissions mean that the permissions are set for the group rather than for the user, and any user that you choose to add to this group will automatically get all the permissions you have specified for the group. Once you check the box, new checkboxes will appear, allowing you to specify the permissions for this group, according to your preferences. For instance a group called 'support' may have a certain set of permissions, and by adding users to the support group, they will automatically have the support group permissions.
6. Finally **Name** the new group you have just created and Click **Save**.

31 User Groups

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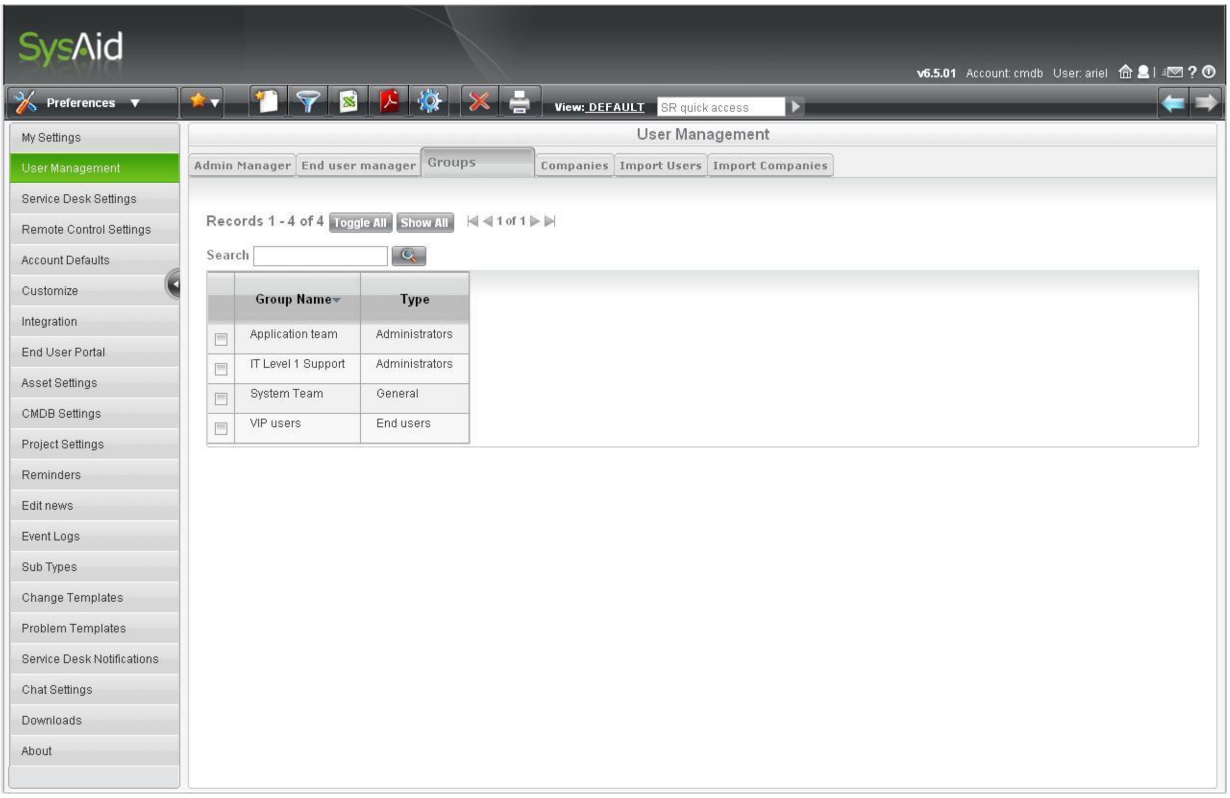

Note that you can add, delete or modify a group using the upper menu buttons. You can also filter, export to CSV, print the list, or print only the groups you have selected.

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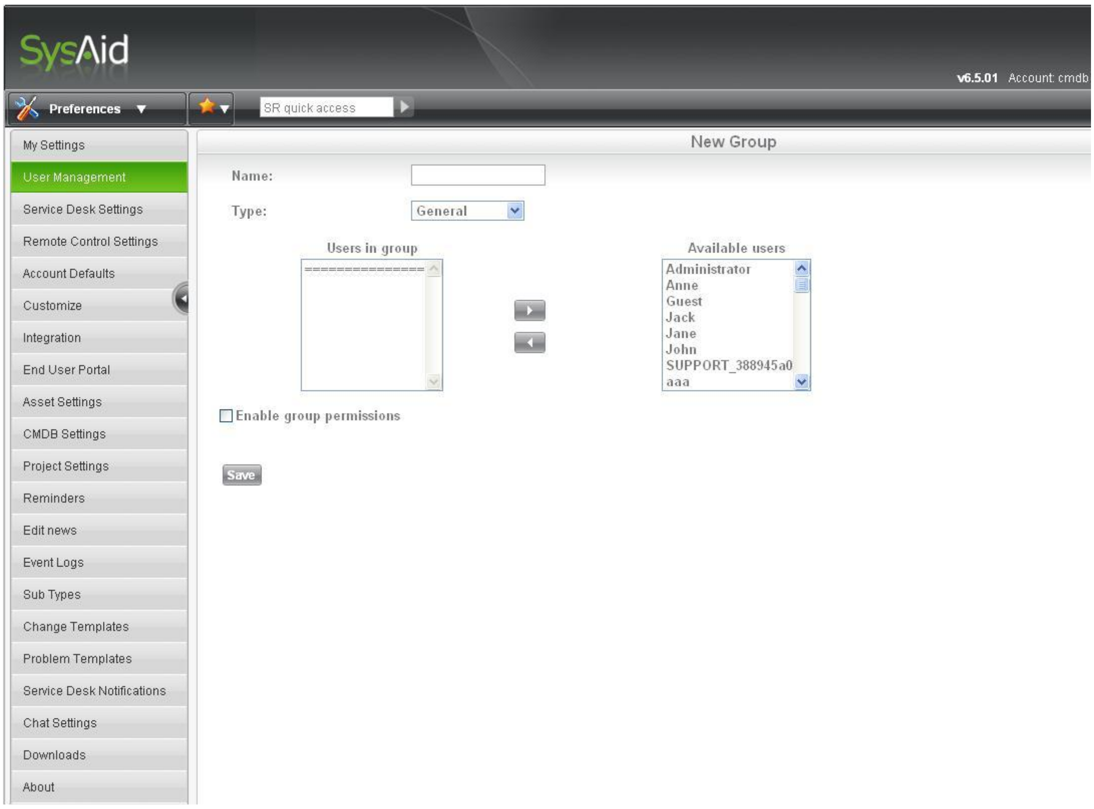
32 New User Group



If you want an assigned administrator to read/write only service requests assigned to the new group, you can set this up in **Permissions** tab (**Preferences→** click on an administrator → **Permissions** tab, choose from the dropdown menu 'View Service Requests that are assigned to user and group only'.

You can also customize SysAid to present different values in the dropdown menus of customized lists within service requests according to your different user groups. limit specific values to specific user groups. Under **Preferences→ Customize→ Customized Lists**, choose which groups will be able to see which menu items.

You can also set automatic priorities and due dates for your service request, set the alerts and the escalation rules. For further details see **Chapter 8: Managing the Helpdesk- Advanced Settings**.

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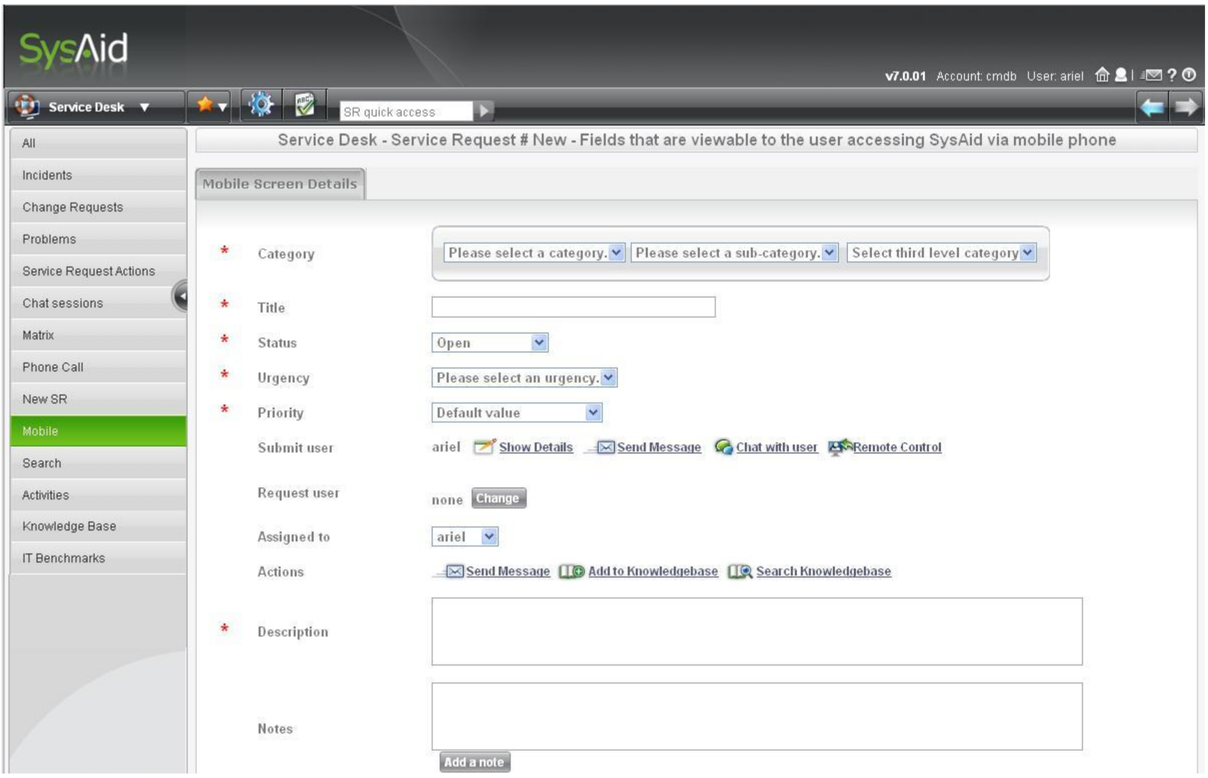
Mobile Portal

Under **Service Desk→ Mobile** you can determine your preferences for entering the SysAid service desk via a mobile phone. You will notice that mandatory fields are marked with an asterisk. Other fields you can add or remove form the view in your mobile by clicking the Customize icon and moving them between the Available and the Visible fields boxes. To learn more about customizing SysAid forms, please go to: **Customize the Form**, chapter 7 in this guide.

You can perform various actions in SysAid, using your mobile phone, when you are away from your office: you can open a new service request, search the knowledgebase, send messages, or even chat with the end user via you mobile phone.

33 Mobile Portal configuration page



If you have Iphone, you can reach the SyAId mobile portal via your Iphone, open and edit service requests, and more.

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Chapter 5 Inventory – Asset Management

5.1. Getting Started With Assets

Here we will review how you can manage your assets:

- Let SysAid Discover your network
- Review of your assets.
- Learn how to add, group and categorize assets.
- Remote control assets
- Connect an asset to an end user

Network Discovery:

Automate SysAid to update the asset inventory at specified intervals

SysAid includes a pre-defined schedule for inventory updates and agent upgrades.

Under the **Network Discovery** tab, you can create tasks, which SysAid will perform automatically and repeatedly. SysAid keeps track of network machines, retrieving and listing their information for easy IT management. When somebody adds hardware to his or her computer, installs new software, or makes any such changes, you want to be able to see it.

1. If you want SysAid to automatically perform an update and check for new updates of an already existing asset at predetermined intervals, go to **Asset Management → Network Discovery.** Here you can program the frequency within which an asset update is performed.

- The line for adding a new task appears on the top.
- **Group** refers to a group of assets.
- **Asset ID** refers to a particular asset.

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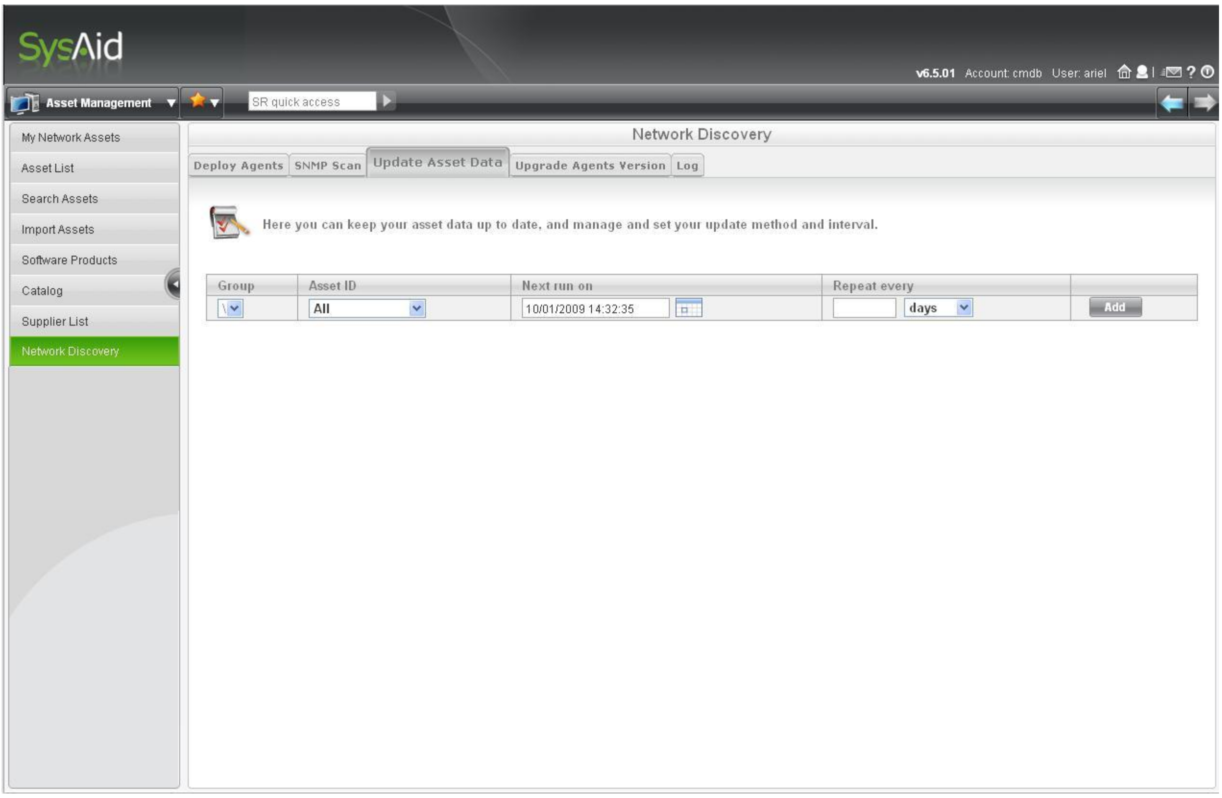
34 Asset Network Discovery



2. To create a new task, choose the assets you want the task performed on. Then choose a task **Command.** The **Inventory** command scans the network for new/updates.

3. Finally, choose how often to repeat the task (**Next run on; Repeat every**).

4. If you have set up everything successfully the **Run Now** button will appear on the screen. This can be used instantly as a test. However, if you do not want to wait for the time of the next scheduled run, you can click **Run Now**. In case you do not see the **Run Now** button, this means the task you have tried to set up does not have complete information.

5. After you have clicked **Run Now**, to see all of your assets following the update click **Asset management → My Network Assets\.**

Note: Automated updates of the asset inventory will not take place on newly added computers, if they do not have the SysAid agent on them.

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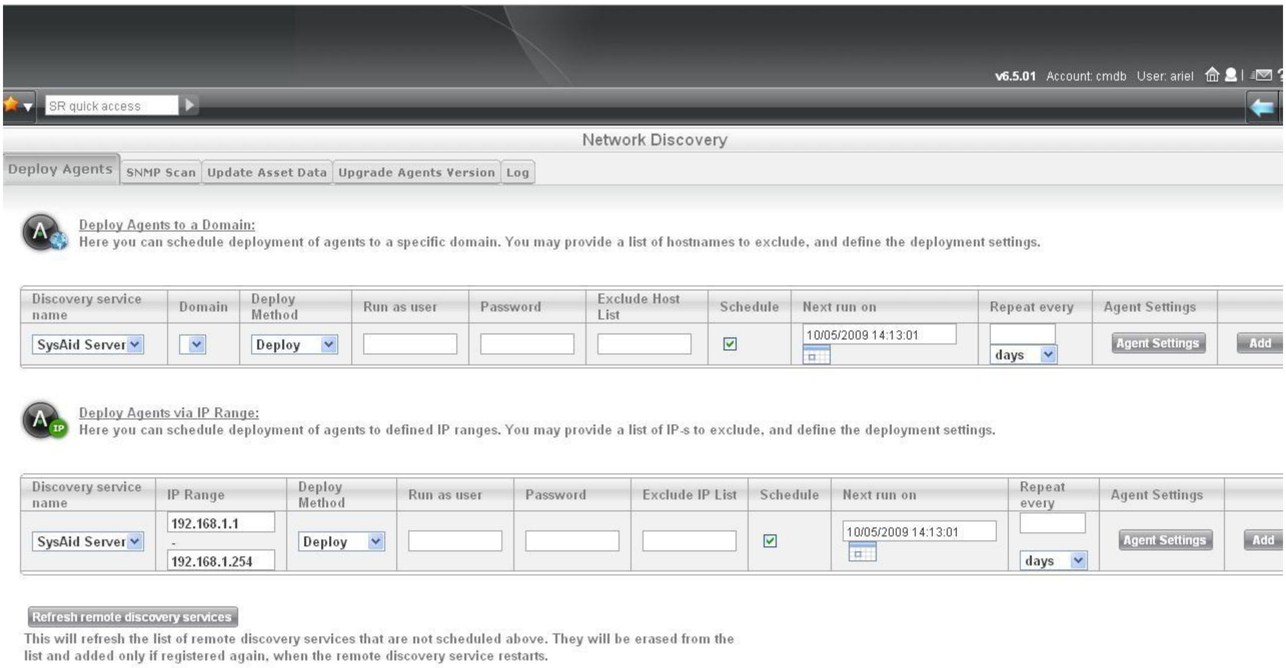
Asset Management- Network Discovery

Under the Network Discovery, you can configure the deployment of the sysAid agent, SNMP scans, updates of the asset data and upgrading the version of your agent. You can also view the process of running network discovery tasks, and a log of historical tasks. Note that the SysAid agent can be installed on virtual machines as well. If you install the SysAid Agent onto a virtual machine, the agent can determine which hardware the virtual machine is installed on. The virtual machine can also be imported into your CMDB and automatically related to the hardware it is installed on.

Asset Management→ Network Discovery→ Deploy Agents

35 Deployment of agents



Here you can schedule the deployment of agents for a specific domain, or according to defined IP ranges.

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Deploy Agents to a Domain

The first option is marked by this icon , and allows you to determine your preferences for a scheduled deployment to a domain. You may provide a list of hostnames to exclude from the deployment of the agents, and define the deployment settings. Use the dropdown menu to choose the name and the domain of the discovery service you wish to schedule a deployment for. The third dropdown menu helps you determine whether you wish to deploy or to remove the deployment.

If you check the **Schedule** box, you can insert or choose by clicking the calendar icon the next time to run the deployment. You any direct SysAid to repeat the deployment once every few days, weeks or months, by filling in the desired number in the pane, and choosing the correct period from the dropdown menu beneath it.

To edit the agent settings, click the **Agent Settings** button. SysAid will open a popup screen where you can make your adjustments, and determine the following details regarding your agent:

You may change the information about the server URL, the Proxy server, the hotkey, the log level and more such details. You may also upload an icon for your agent, or remove the customized icon. Determine here the refresh intervals of running the agent as a service, by inserting the number of seconds in the pane.

You may also determine the remote control settings for the agent. Check the boxes if you wish to enable remote control, if you wish the remote control to proceed only if the end user approves it, or if you wish to install a mirror driver to accelerate the performance. You may also edit in this popup screen the text of the remote control confirmation request, and the text for the **Accept/Deny** remote control buttons.

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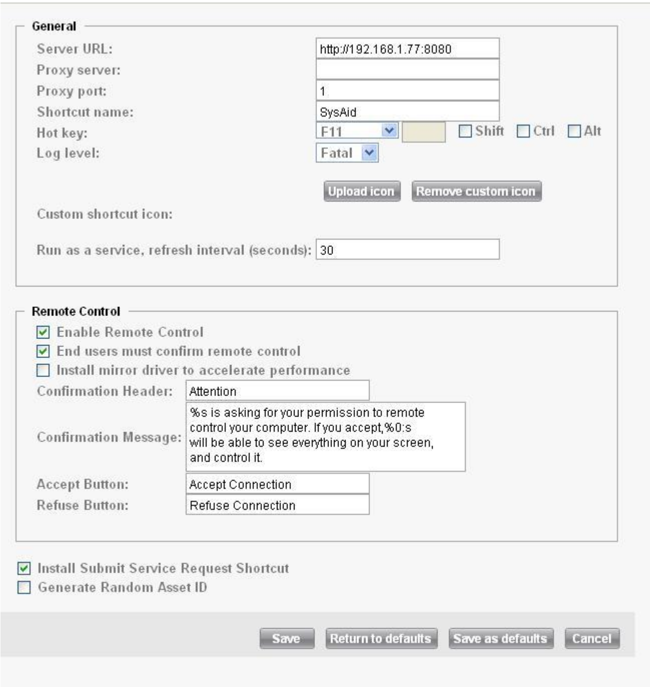
Choose whether SysAid should install a shortcut for submitting service requests in all the assets the agent is deployed on, and whether SysAid should generate a random asset ID for your network assets.

36 Agent Settings Popup Screen



Click **Save** to keep your changes of the agent settings. You may choose to save your settings as a default or return to the default, by clicking the suitable buttons.

Click the **Add** button under the **Deploy Agents** tab, to keep the scheduled deployment to a domain you have just created.

Deploy Agents according to an IP range

The second option is marked by this icon , and allows you to determine your preferences for a scheduled deployment to your specified IP ranges.

From the first dropdown menu on the left, choose the name of your discovery service. In the IP Range boxes, insert the number for the lower IP and the upper IP in your range, in the upper and lower boxes, accordingly. Use the **Deploy**

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Method checkbox to choose whether to deploy or remove the deployment of the agent. If you wish to schedule a recurring deployment, check the **Schedule** box, and click the calendar icon to select a date for running the next deployment. Fill in the number of days, weeks or months you wish the deployment to be repeated, and use the dropdown menu to select the period suitable to you. You may click the **Agent Settings** button to edit the settings of the agent, as described above (regarding the deployment to a domain). Click the **Add** button under the **Deploy Agents** tab, to keep the scheduled deployment to an IP range you have just created.

SysAid SNMP- Simple Network Management Protocol

SysAid Asset management module uses the SNMP protocol to discover and manage all your network devices such as: printers, routers, switches etc. You can also find out about changes in these devices and monitor various data that the device makes available, such as toner level for printers and so on. SysAid can process SNMP traps and notify you accordingly. An SNMP trap is a notification sent from an SNMP device, in this case to SysAid. An example is a printer sending a low toner notification.

37 SNMP Scan Table

Discovery service name	IP Range	SNMP Version	Community String	Community Password	Exclude IP List	Schedule	Next run on	Repeat every
DEFAULT	192.168.1.0 - 192.168.1.255	SNMP V1	public			☑	03/23/2009 16:18:17	days

<u>SNMP scan settings</u>:

To determine the settings for your SNMP discovery service, go to:

Asset Management→ Network Discovery→ SNMP Scan tab.

The SysAid SNMP scan identifies new devices in your network. SysAid identifies the ID of the device according to the mac address of the first interface of the device.

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Here you can determine which service will perform the scanning of your network for new devices. The default service is the SysAid Server, but you can also add other remote discovery services, by choosing form the **Discovery Service Name** dropdown menu.
To learn more about adding remote discovery service name see **Preferences → Downloads.**

The **IP Range** column presents the default range for scanning, which is the subnet that your SysAid Server resides in. You can set it to a different range, according to your needs.
You can also choose the SNMP version you wish to use. Note that version V3 requires a password.

The Community String is a code that allows the communication, and by default in most devices it is public. You can change the Community string to be different than public, to match the community strings on your devices.

You can use the Exclude IP List column to specify which devices should not be included in the scan range entered.

Under the Schedule column you can decide whether the scan will be automatically preformed in certain intervals according to your preferences, or you wish to manually perform the scan yourself by clicking the **Run Now** button.
You have a possibility to refresh the list of remote discovery services that are not scheduled, by clicking the button on the bottom of the page. These will be erased from the list and added only when the Remote discover tool registers again.

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Under the **Asset Management→Network Discovery→ Log** tab, you can view the history of your network scanning, and the progress of currently running scans.
To see more details about each scan, click the row entry of that scan in the table.

Keeping your assets updated:

To make sure assets that were discovered by SysAid SNMP Discovery service are periodically updated, you can set regular updates under **Asset Management→ Network Discovery→ Update Asset Data** tab, as described earlier in this Guide, in Chapter 5.1: **Automate SysAid to update the asset inventory at specified intervals**.

Customize the information extracted from your network devices:

You can create a list of custom OID-s that will be retrieved from your devices and mapped into different asset fields.
OID-s (Object Identifiers) are special codes each vendor manages to allow communicate via the SNMP protocol, a common language between your server and the network device. You can edit your OID-s list under **Preferences→ Asset Settings→ Customized SNMP OID-s** tab.
Here you can find a table with a list of common OID keys used by manufacturers of network devices. You can manually add new keys and descriptions for new network devices here, if you choose. It is recommended to add a clear display name for the device you wish to list. If you add more information, for instance, where is the device located and who is responsible for it, you will be able to see this information in SysAid, too.
The Mapped Field column helps you determine where the information will be presented in the asset page in SysAid. You can choose the appropriate field from the dropdown menu.

An example for a customized OID you might want to add is the Toner Level of your printer. Find in the documentation of your printer the OID that holds this

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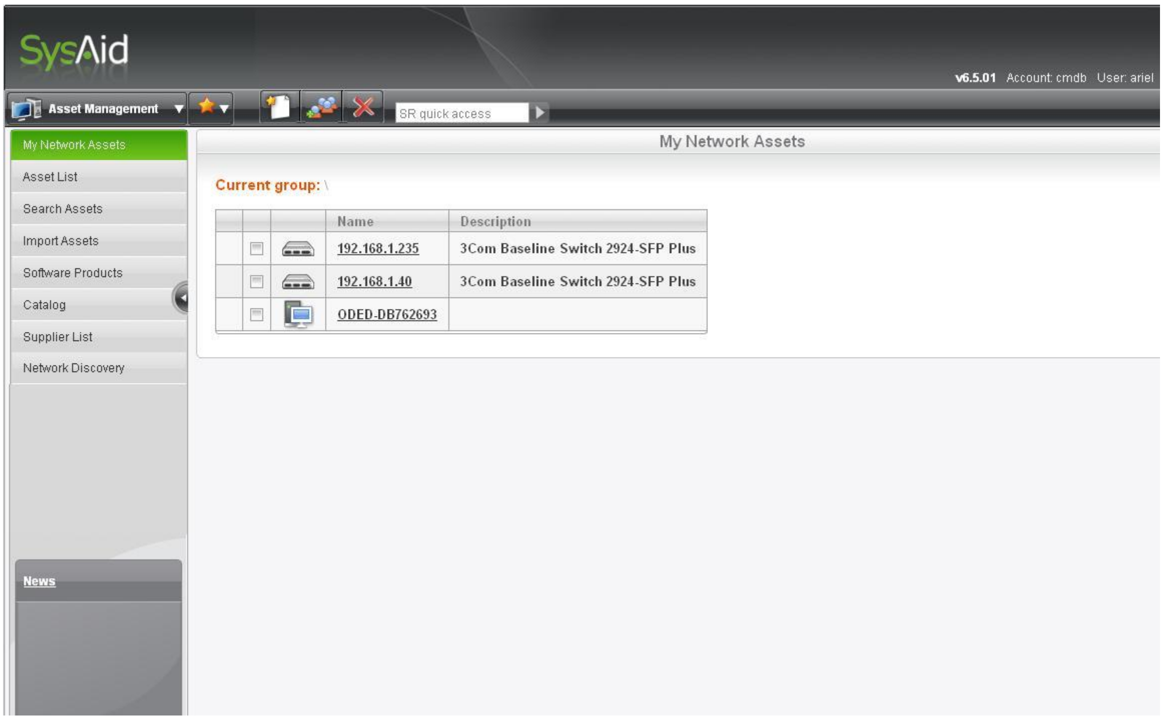
value, and add it to the customized OID list. Map this OID to a custom field and change its name. You can do so, under **Preferences→ Customize→ Translate.** To learn more about adding your own customized fields, please read Chapter 7 in this guide, under: **Benefits of the Translate Option - Customizing the Menu Options and Headings**

Reviewing Assets

To access the **Asset Management** module, click on **Asset management** from the sidebar menu. If you click on **My Network Assets** or **Asset List,** generally these pages list all of your assets. Right now, however, these pages will not contain anything as you have just completed installation and need to start the process of adding you assets**.**

If your server is installed on Windows operating system and you have a new installation of release 6.0 and above, the server itself should appear as your first asset. Your server will appear in your Asset List automatically, a few minutes following the initial installation.

My Network Assets



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Adding Assets – various options

There are four ways in which you can add the assets of your company to the inventory:

1. Automatically add assets – adds all computers that operate with Windows and Linux. First you need to deploy the SysAid agent -as described in section 5.2 below.

2. Automatically detect network devices using an SNMP scan. See section 5.2 in this guide for further details regarding this option.

3. To add an asset manually, go to the main menu, click **Asset management → Add Assets**. There you will see the link to please add it manually. You can also use the icon **Create New Asset**, from the Asset List for the same purpose.

3. Alternatively you can click **System → Asset List** and double click on the new icon; this will allow you to a **Create Standalone Asset**. Once you have completed all of the fields in the **Information** page, click **Ok** to save.

4. Finally, assets can also be imported from a comma delimited file (.csv), in the menu click **Asset management → Import Assets, Browse** for a file or files to import. The advantage of this method is that if you have a large number of assets to be added manually you can specify the details in an excel file and import them into SysAid in one simple step. The Excel file should not include any column headings and should be saved in .csv format. Note that this option is available for importing users and companies as well, **under Preferences → User Management**

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Import a .csv file from Excel

1. To import a .csv file from Excel, first prepare the Excel file. To give you an idea of the fields used in SysAid, go to **Asset management → Import Assets**. Under the column heading **Field Content,** click on the dropdown menu. Here you will see all the field names. Build your Excel file based on those fields.

2. Save your Excel file as a .csv file. Go to **Asset management → Import Assets**. Click on the **Browse** button. Select the file name.

3. In the **Number of Fields,** enter the column headings or number of fields you have in the Excel file (maximum 32). It is advisable not to add or subtract from this number in the Number of Fields box whilst you are in the middle of selecting **Field Content**, since this will delete the already completed row entries.

4. The **Format box** only needs to be completed if you have a date field. You can use either European (dd/mm/yyyy) or US date formats (mm/dd/yyyy).

5. Finally click the **Submit** button. To confirm that the file was imported successfully, go to **My Network Assets** and click on each of the assets, and check the information.

6. It is worthwhile to create specific icons for imported assets, otherwise the default icon given by SysAid to imported assets is:  which indicates a communication problem between SysAid server and the asset. See the **Icons** section below for further instructions.

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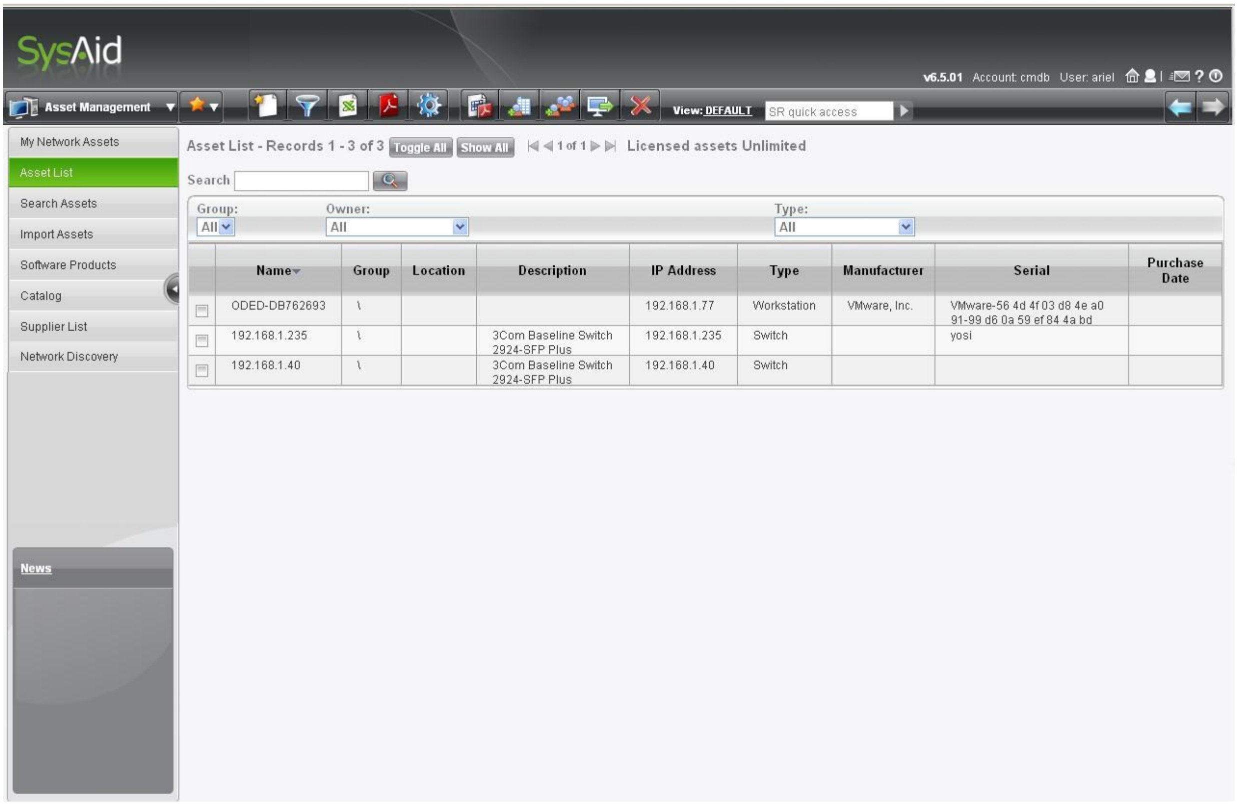
When importing an asset from a csv file, SysAid can import also the company and the group the asset belongs to. The name of the group and the name of the company will be created in case this information was not registered before.

Asset List

Another way to view the assets of your organization is via the Asset List (**Asset management→ Asset List**).

More information on how to customize lists and manage them can be found in Chapter 7.

38 Asset List



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By clicking on one of the assets the **Information** page will open. This page contains an overview of that asset. You can easily navigate to any of the additional six pages that detail the attributes of that asset: **Maintenance**, **Help Desk**, **Hardware**, **Software**, **Activity Log**, and **Remote Control**. In each page you can review, add and update information on that particular asset. From each of these pages you can add or remove fields by clicking on the **Customize** icon or print out the contents of the asset by clicking on **Print** icon. Further details of how to manage this list are provided in Chapter 7.

To review those service requests that relate to a specified asset, first select the asset from the **Asset List,** and then click on the **Help Desk** tab; in this screen you will see the **Service Request List** for that asset.

Asset Monitoring Tab

When looking at the details of a specific asset, you can check the **Monitoring** tab. Under this tab it is possible to view any monitoring information defined on this asset and check the status of its monitoring configurations and monitoring graphs.

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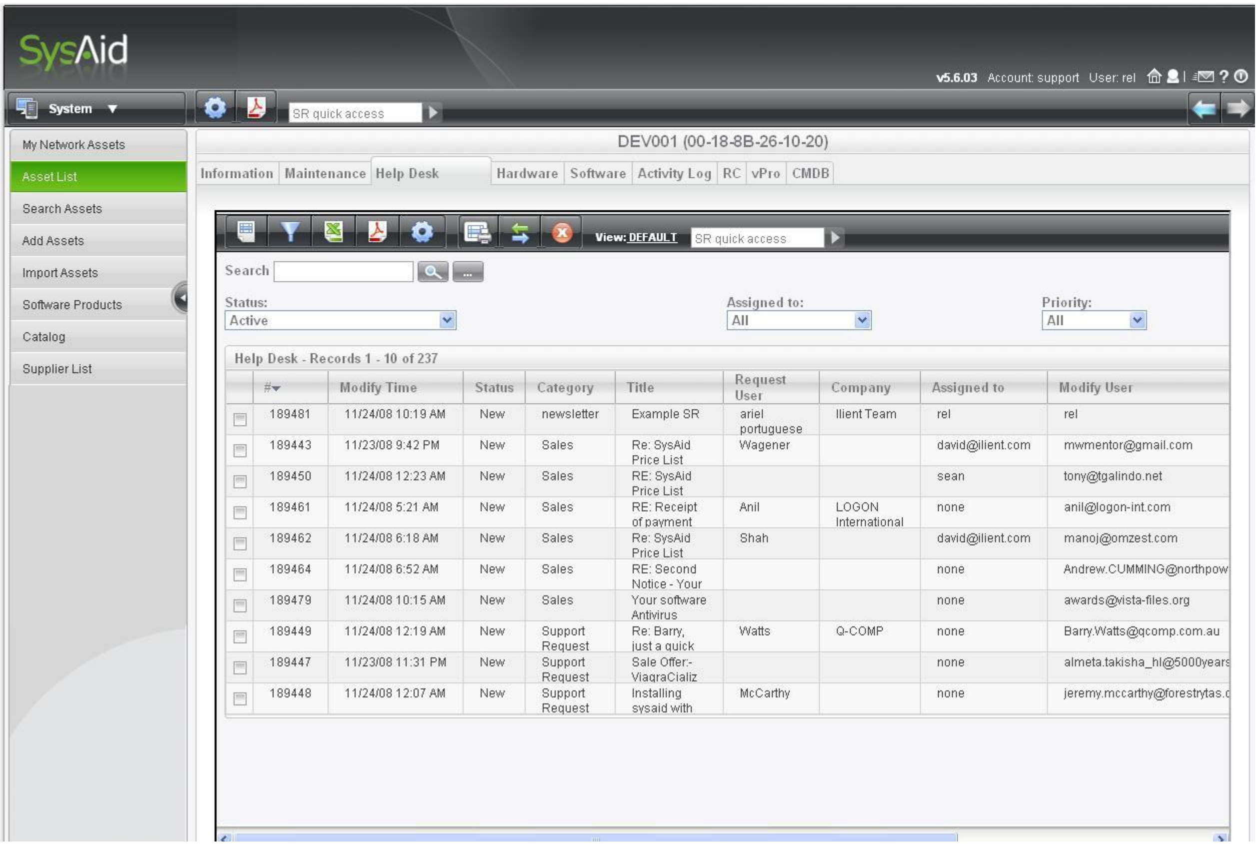
39 A Service Request submitted relating to a specific asset



The Hardware and Software pages provide you with exact listing of what the computer contains.

If you have deployed the SysAid agent, each time your software or hardware changes, these changes are automatically recorded in the **Activity Log.** If you click on More info…, the specific inventory changes will be displayed, with the date and time. If a service request is sent from a user whose computer is listed as belonging to that user, then all service requests sent from that asset will also be listed in the **Activity Log**.

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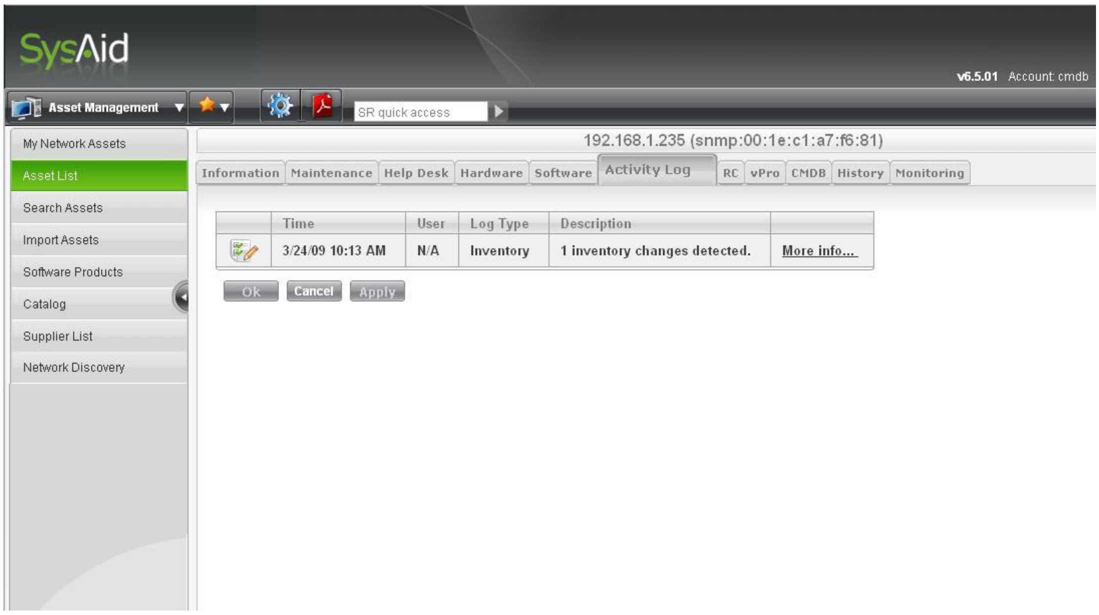
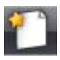
40 Activity Log



Finally the **Remote Control** page details the last time remote control access was performed and the host name of a particular computer. Setting up remote control is detailed below.

Setting up Asset Folders

Now that all of your assets are listed in **My Network Assets**, you should plan how you would like to organize your assets. For example, you can decide on the number of groups needed. Plan the name of the groups and what type of assets should be included.

1. To create a group of assets go to the **My Network Assets** page. To select assets for the new group click on the small box □ located to the left of the asset icon.
2. In the top menu bar, click on the **New Group**  icon.
3. Click the **Move to Group**  button on the top menu bar. A popup box will open, prompting you for a name for this group. Type the name of the group and click **OK**.

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4. In **My Network Assets** the new group you created will appear with an icon. Click on the name of the group to see all assets which are assigned to that group.

Browsing Hierarchies and Assets

To browse a hierarchy and to see the contents of any asset group, click on its name. The page detailing the information for that asset will open.

To drill down to see the contents of an asset group, click on the group asset name and its contents will appear. To return to the parent group click → **Up** link.

Move an asset or group of assets into a different group

If you notice that an asset appears in the wrong group, you can easily move it.

1. In **the My Network Assets** screen, browse to the appropriate level of the hierarchy, where the asset or group is displayed with a check box. Click on the check box for all those assets or groups that you would like to move, simultaneously.
2. At the top of the **My Network Assets** page, click on the **Move to Group** button , a dropdown menu will open; chose the group that the assets you selected will be moved to.
3. Click **Save**. The assets will have been moved.

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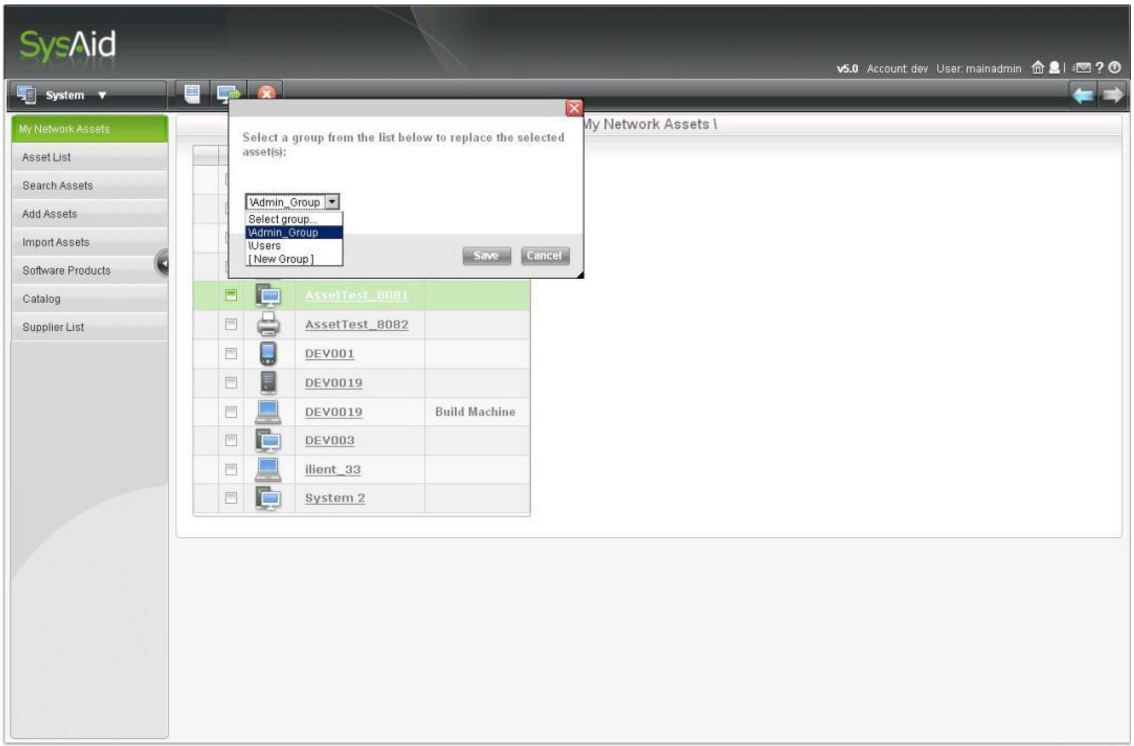

Icons

Select and Upload Asset Icons and Add a New Caption

You are free to add new asset icon images for asset groups or for individual assets. You can also add new caption text to the icon.

1. In the sidebar click **Preferences → Asset Settings → Assets Types** tab
2. In the **Asset Types** tab, you can choose icons associated with asset types, or even define new asset types. These types are displayed in the **Asset List** (Figure 25).
3. If you have your own icons you can upload them and add them, too. Click on the **Upload Icon** button, or click on the **Change Icon** button next to the asset of your choice. When the new popup screen opens **Browse** for the file containing the icons. To finish click **Upload**. Then click the **Add** button.

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4. To add new caption text to the icon, click on the **Change Caption button.** A popup box will appear. Enter the new text, and then click **OK**.

You can set up in the **Asset Types** tab the icon to appear next to imported assets, so that you will easily identify them. In the **Type** caption box create a name that will appear next to your imported assets in the **My Network Assets**/. Upload the icon. Click **Add**.
Make sure that one of the fields in your **Excel** table is called **Import**. Do not forget to define this field as "**Type**" in the **Field Content** on the **Import Assets** screen. After import, to change the caption next to the icon, follow step 4 above.

Registry Key Values

Under **Preferences →Asset Settings** you can find the registry key values tab.
The SysAid agent can collect customized registry key values. They are added to your asset information. For example, you may want to collect the file definition or the date of the last update of your anti-virus program – you can find this information in the registry, usually under your antivirus software section.

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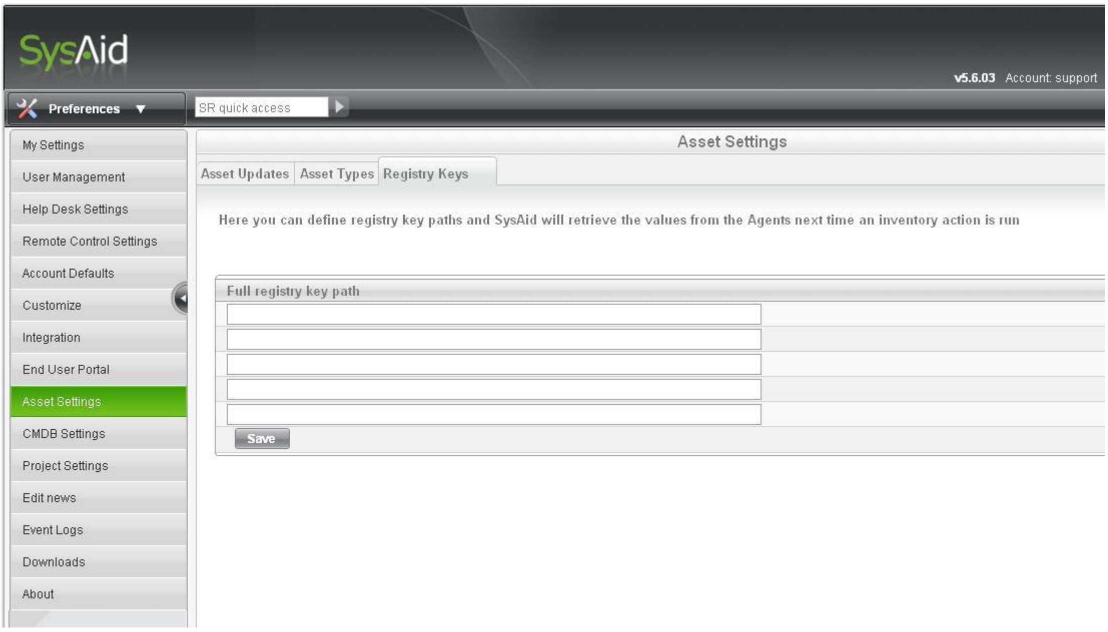
42 Registry Key Values Tab



Remote Control Settings

With SysAid, administrators can remote control many assets. An administrator can access a remote asset from his/her own computer, controlling it from afar. This enables administrators to fix end users' problems without leaving their offices. If you elect for all computers to be remote controlled, leave the default settings as they are. The remote control tool can be used to connect to a machine running Windows 7 as well.

Deny Remote Control Access to All Assets

1. To deny remote control access to assets, in SysAid’s sidebar click **Preferences → RC Settings** (Figure 31).

2. This page is where you specify a default rule – whether to **Allow** or **Deny** remote control (click on the drop down menu).

Allow - permits and authorizes remote control access to all assets.

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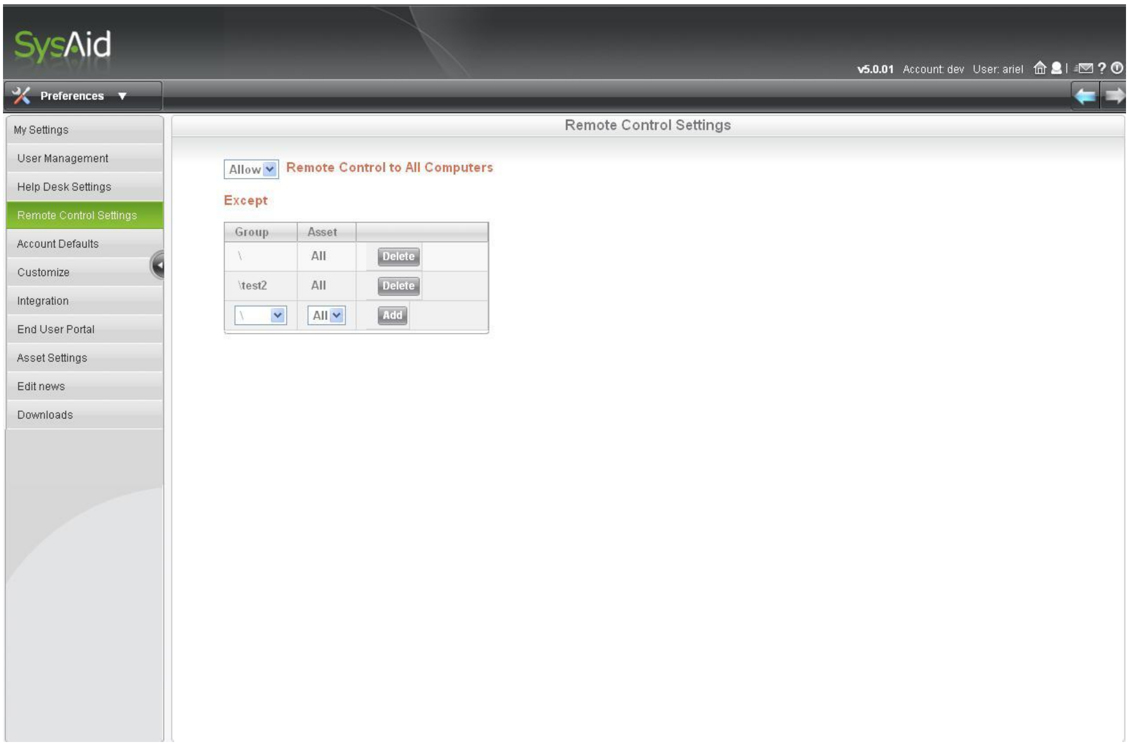
Deny - Prevents/prohibits remote control access to all assets.

43 Remote Control Settings



3. At the top of the **Remote Control Settings** page, make sure that **Deny** appears in the dropdown box. Ensure that there are **no row entries** in the Except table. This setting will deny remote control access to all assets.

Allow Remote Control Access to All Assets

To allow remote control access to all assets, verify that **Allow** appears in the dropdown box at the top of the **Remote Control Settings** page. Make sure that there are <u>no</u> row entries in the Except table. This will allow remote control access to all assets.

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Other Options No. 1 - How to set up the following access rule: To allow remote control access to the majority of assets, at the same time excluding a few assets from remote control.

1. For this rule select the **Allow** tab in the dropdown menu.
2. In the Table, titled **Except** specify those assets you want to exclude from remote control.
3. If the asset is in a group, select the name of the group; go to the first column and move to the row where you can see the dropdown menu. Select the group the asset belongs to.
4. Only move to the asset column, and select the asset itself if you **do not want to exclude an entire asset group.**
5. Now move to the last column and click the **Add** button.

The rule is simple; use the **Allow** or **Deny** setting in the drop down menu to specify the rule for the majority of the assets. For exceptions to the rule (the rule is set in the **Allow** or **Deny** drop down box) enter these exception in the table called **Except**.

Option 2 - Setting up a rule - Deny access to all assets except for a few assets.

1. For this rule select the **Deny** tab in the dropdown menu.
2. In the Table titled **Except** specify those assets you want to allow remote control access to.

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3. If the asset is in a group, select the group; go to the first column, and move to the row where you can see the dropdown menu. Select the group the asset belongs to.
4. Now move to the next column, and select the **Asset** that is to be excluded from the dropdown menu itself. Each asset will appear in a different row.
5. Move to the last column and click the **Add** button**.**
6. Assets can easily be removed from the **Excep**t table by clicking the **Delete** tab on the appropriate row.

Exercising Remote Control over another computer

In order to exercise remote control over another computer, you need to first:

- Allow remote control over that distant computer (see previous section).
- Permit the administrator to activate remote control. To learn how to do that, please consult the section **Administrator's Permissions** in Chapter three of this guide.
- Install the **Administrator Tools** in your network. To learn more about the installation of these tools please consult *Guide 4: Administrator Tools Installation Guide*, http://www.ilient.com/down/administrator_tools.PDF

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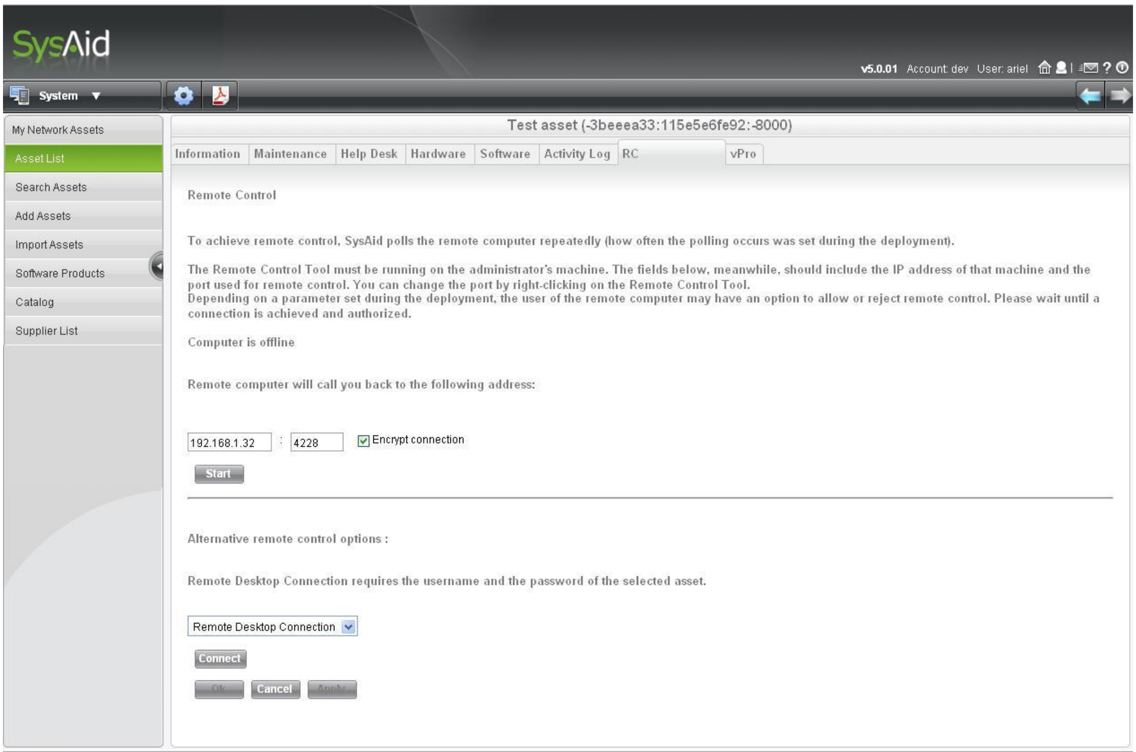
Once you have taken care to fulfill the conditions specified above, you can move on to activate the remote control from your own computer as follows:

1. Go to **Asset management→ Asset List→** choose the computer you wish to remote control.
2. Go to the Remote Control (RC) tab. You will be able to see the IP and the port your computer is listening on.

44 Remote Control tab



3. Since you have installed the Administrator Tools, you will be able to see a small icon of an eye at the right bottom corner of your screen, on the lower horizontal bar. Notice the background of the eye icon is green. 

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This is an indication that your computer is not being remote controlled by another computer on your network. Similar icon exists in all the computers on your network.

4. If you wish to exercise a remote control over another computer with an encrypted communication, please check the box **Encrypt communication** which appears on the RC page.
5. You should also make sure that the port you are listening on enables encrypted communication. To verify that, stand with your mouse on the eye icon on the lower horizontal bar of your screen. You will be able to see the number of the port which enables encrypted communication. If this is not the same port as the one specified in the RC page, change your current listening port to the port which appears in the eye icon.
6. In case you have defined in the deployment process that the end user whose computer you wish to remote control should permit your access, in this stage a box asking for permission to exercise remote control will appear on the screen of the computer you have asked to control. Only when the end user will allow you access to his/her computer, will you be able to remote control it.
7. Even if you did not define in the deployment process that a permission form the end user is required, once you remote control a distant computer, the end user will be able to see his/her computer is being remote controlled, since the background color of the eye icon in the controlled computer will change into blue:

Enabling Remote Control with Alternative Programs

In case the SysAid remote control tool does not coordinate with your own system, you may use one of the following alternative remote control tools with SysAid:

- Remote Desktop Connection
- Ultra VNC Viewer

To be able to use one of these alternative remote control tools with SysAid you need to:

1. Purchase one of these alternative tools separately, as they are not a part of SysAid.
2. In the left bottom of corner of your computer go to: **Start →** **Control Panel → Asset management →** Click the **Remote** tab.
3. Check the box: 'Allow Remote Assistance invitations to be sent from this computer'.
4. Go to Ultra VNC website at: http://www.uvnc.com/download
5. On the administrator side, install the VNC viewer.
6. On the client side, install the VNC server.
7. Once you connect to Remote Control, click Open. Insert the username and password of the remote-controlled computer, and click Remember to insure you will not be asked to give the username and password again the next time you remote control this computer.

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Intel vPro Support

vPro is a chip by Intel that provides support for software and hardware inventory management. The vPro chip allows remote access to your network, even to machines that are turned off.

If you have vPro chip installed on your network assets, you can use SysAid to control your network even when you are not in the office.

1. In the SysAid administrator portal go to Asset management → Asset List.
2. Click on an asset from your list that has the vPro chip installed.
3. A new page will open, with the details of that asset. Go to the vPro tab, which is the last tab in the asset page.
4. Click **OK** or **Apply** to allow control over the asset via SysAid.

To learn more about Intel vPro go to:
http://www.intel.com/technology/vpro/index.htm

Connecting an Asset to an End User

IT administrators have a hectic schedule; with SysAid they can potentially receive hundreds of service Requests per day. If you have SysAid Help Desk and Asset Management you can make this task easier. One of the ways SysAid can be helpful is by linking the end users' computer (asset) to the user him/herself, or to a group of users, for example a shared printer. This greatly assists administrators. When a service request is opened, the administrator immediately views the asset it refers to. Even if the user submits the request via the SysAid interface yet from another computer, the administrator will still see the asset that user is linked to. The administrator can easily see the history of the asset, or how many times problems are reoccurring on a particular computer.

You can link an asset either to one end user, or to a group of end users. This is set up in the **Information** page of the appropriate asset.

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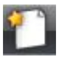
1. Go to **Asset management →My Network Assets.**
2. Click the asset you wish to link to a user.
3. In the **Information** page, select the appropriate user/users in the **User** field
4. Click **Save**.

Deleting an asset or a group of assets

To delete an asset click **My Network Assets**; select an asset or a group of assets by clicking on the check box, or browse within the hierarchy where the asset or group is displayed. Click the **Delete** button at the top of the page. When you delete a group, all its assets will also be deleted.

Software Products

If you click the Software Product link in the SysAid sidebar menu, you will navigate to the **Software Products** page. To begin with, this page will be empty, of course. You need to feed the information about your software products. Click on the **New**  icon. This will lead you to a form in which you can specify various details about a software product used by the computers of your net. The fields in the form are: the name of the product, the company it belongs to, the vendor of the product, the number of the license for the product, the purchase date and the support expiration date for the product.
You can also add notes about the specific software product you are adding.

45 New Software Page

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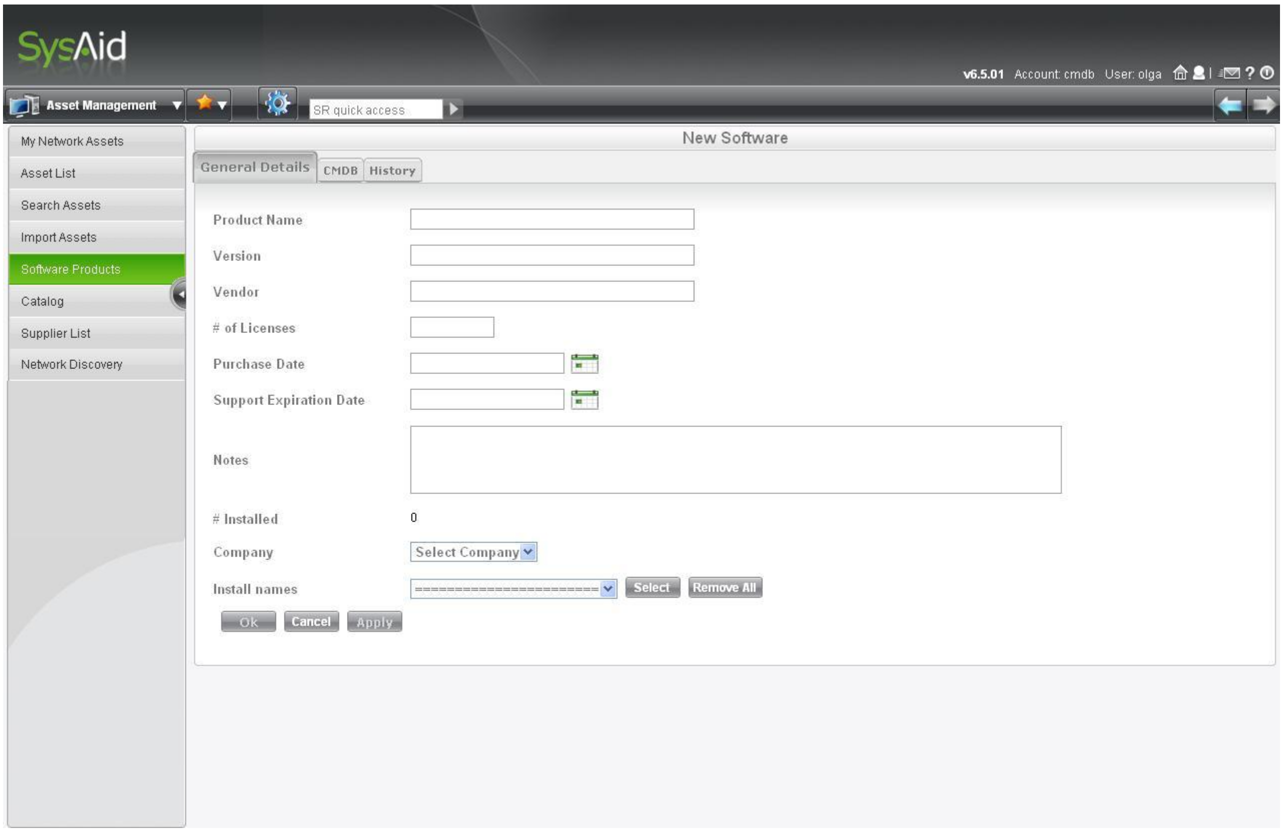

Fields can be added or removed by using the Customize Form  icon on the top of the page. To learn more about how to use this icon, please go to **Chapter 7** of this guide. For instance, you many want to customize this form so some of your software can be designated as freeware. SysAid will not prompt you for a number of licenses purchased for this software.

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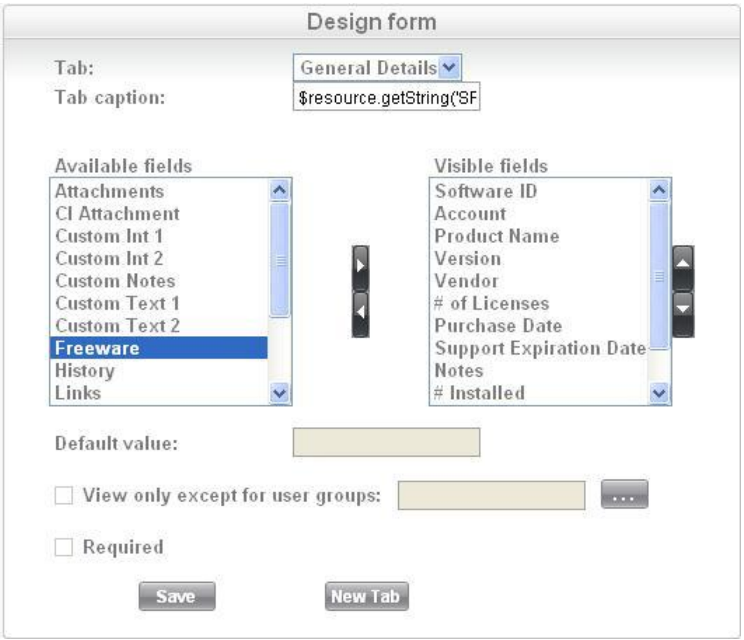
46 Add field to select software as freeware



In a box at the bottom of this page you can see the **Available Install Names** of the software products in your organization, as detected by the SysAid agent. Please select from the list those software products that are used on your computers, and add them to the **Install Names** box. For Instance, there might be listed Windows 97, Windows 2000, and Windows XP in the **Available Install Names.** Your network computers, however, might employ only Windows XP. In this case you need to add into the **Install Names** box only the Windows XP software product. You can direct SysAid to show only non-used install names, which allows you to view clearly which install names do not have a software product assigned to yet.

Under **Asset Management→** a specific asset→ **Software Products** tab, you can see a table displaying the software products that are installed on this asset according to your pre-defined lists of software products.

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Catalog Items

The catalog list is the grouping of specific assets according to the type of catalog item they belong to. For example, in the case you have several DELL Latitude D830 model laptops. The catalog item will be Dell D830, and it will be automatically detected by the SysAid Agent.

To reach the **Catalog** page, click the **Catalog** link in the SysAid sidebar menu. To begin with, this page, too will be empty. You need to feed the information of your catalog items. To add a new catalog item to your list, click on the **New** icon. This will lead you to a form called **New Catalog Item**, in which you can specify various details about a catalog item used for the computers of your net. The fields on this form are: the catalog number, the name of the item, the model of the item, the manufacturer and the supplier of the item. You can also add notes regarding the item you are adding to the catalog list. Fields can be added or removed by using the Customize Form icon on the top of the page. To learn more about how to use this icon, please go to Chapter 7 of this guide. Once you have completed the form, click **Save**.

Supplier List

The **Supplier List page** contains information about all the suppliers of the hardware, software and catalog items of your network. You need to feed the information about the suppliers yourself. You can reach this page by clicking on **Asset management→ Supplier List** on the sidebar menu.

To add a new supplier to your list, click on the **New** icon. This will lead you to a form called **New Supplier**, in which you can specify the following details about that supplier: the supplier's name, the supplier's address, phone number, fax number, and the email address of that supplier. You can also add notes to this form, if needed. Fields can be added or removed by using the Customize Form icon on the top of the page. To learn more about how to use this icon,

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please go to Chapter 7 of this guide. Once you have completed filling out the **New Supplier** form, click **Save**.

Online Users

Software Management Notifications

To configure these notifications, go to **Asset Management→ Notifications**. The first tab **is Asset Management Events**. On this page, you can monitor for two types of software events and create corresponding notifications:

1. You have exceeded your number of licenses for a software product on your network.
2. An unrecognized software product was installed on your network.

Exceeded License Notification

SysAid can notify you when the number of installations of particular software exceeds the number of purchased licenses. The notification will include the name of the Asset that put you over the limit.

Unrecognized software installed notification

In the event that software not on your approved list is installed on your network, SysAid can notify you of the foreign software and the machine it was installed onto. The list of approved software is the list of software products you've entered into SysAid in **Asset Management → Software Products**.

Important: SysAid identifies software products by their install name. In order to avoid receiving notifications for routine items like patches and hotfixes, please be sure to associate all approved install names with at least one software product. For more about install names and configuring software products, please go here.

After you've chosen the type of event to monitor, choose a notification. Various notifications can be composed here, under the next tab- **Notification**, and further explanations are given below. You can also add a filter expression for the event that launches a notification, by using the expression builder. Click the three dots button, and build your filter expression in the popup screen, by selecting options from the dropdown menus in the popup. Click the **Add** button

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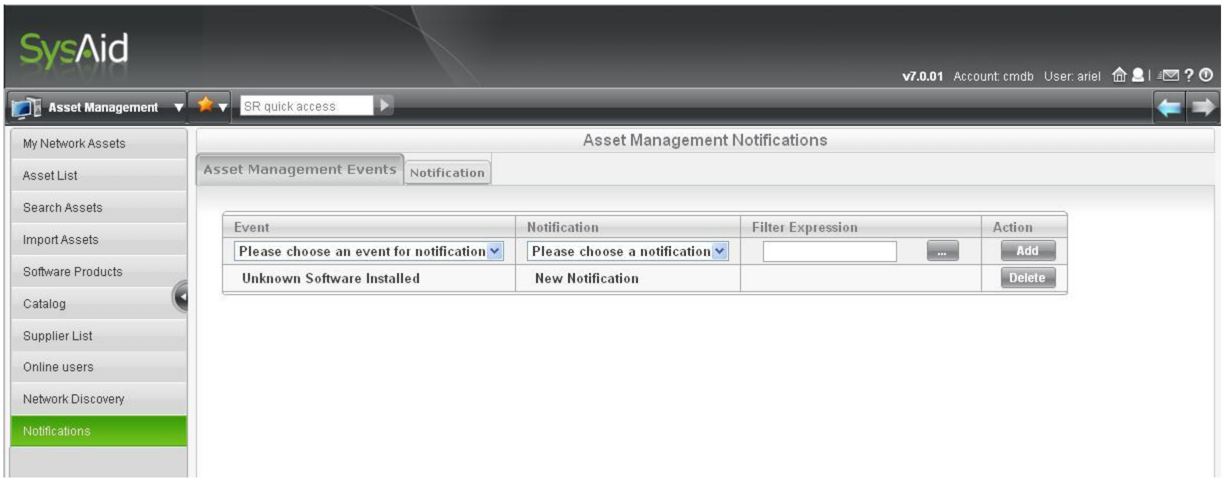
to add your new event for sending a notification, or click the **Delete** button to remove an existing event.

47 Asset Management Event



Under the **Notifications** tab, you can compose the text for your notifications. Click the **New** icon to create a new text, or the **Delete** button to remove an existing notification. When editing a notification, you can choose the type of notification (unknown software or exceeding of licenses), the notification method (SMS, Email, Service Request), and insert a name for your notification. You can view and edit the message details in the next tabs: Mail details/Text Message details/Service Request details. Tags are available for the Asset management notifications. Tags are automatically filled in with the information relevant for each specific notification, by SysAid. For the full list of tags available for automatic notifications in SysAid go to the **Tags** section in this guide.

Once you have completed composing your notification, click the **OK/Apply** button in the **General** page. Now you will be able to see your new notification in the dropdown list under **Asset Management →Notifications→ Asset Management Events** tab, and apply the notification to the relevant event.

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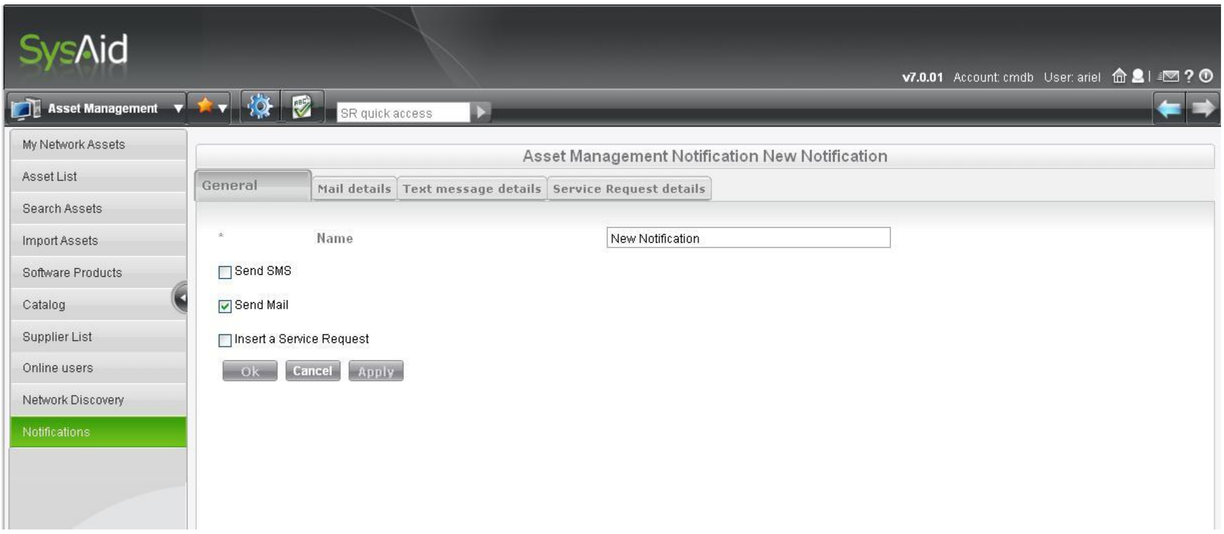
48 Compose New Asset Management Notification



SysAid SNMP- Simple Network Management Protocol

SysAid Asset management module uses the SNMP protocol to discover and manage all your network devices such as: printers, routers, switches etc. You can also find out about changes in these devices and monitor various data that the device makes available, such as toner level for printers and so on.

49 SNMP Scan Table

<u>SNMP scan settings</u>:

To determine the settings for your SNMP discovery service, go to:

Asset Management→ Network Discovery→ SNMP Scan tab.

The SysAid SNMP scan identifies new devices in your network. SysAid identifies the ID of the device according to the mac address of the first interface of the device.

Here you can determine which service will perform the scanning of your network for new devices. The default service is the SysAid Server, but you can

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also add other remote discovery services, by choosing form the **Discovery Service Name** dropdown menu.
To learn more about adding remote discovery service name see **Preferences → Downloads.**

The **IP Range** column presents the default range for scanning, which is the subnet that your SysAid Server resides in. You can set it to a different range, according to your needs.

You can also choose the SNMP version you wish to use. Note that version V3 requires a password.

The Community String is a code that allows the communication, and by default in most devices it is public. You can change the Community string to be different than public, to match the community strings on your devices.

You can use the Exclude IP List column to specify which devices should not be included in the scan range entered.

Under the Schedule column you can decide whether the scan will be automatically preformed in certain intervals according to your preferences, or you wish to manually perform the scan yourself by clicking the **Run Now** button.

Under the **Asset Management→Network Discovery→ Log** tab, you can view the history of your network scanning, and the progress of currently running scans. To see more details about each scan, click the row entry of that scan in the table.

Keeping your assets updated:
To make sure assets that were discovered by SysAid SNMP Discovery service are periodically updated, you can set regular updates under **Asset Management→ Network Discovery→ Update Asset Data** tab, as described earlier in this Guide,

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in Chapter 5.1: **Automate SysAid to update the asset inventory at specified intervals.**

<u>Customize the information extracted from your network devices:</u>

You can create a list of custom OID-s that will be retrieved from your devices and mapped into different asset fields.

OID-s (Object Identifiers) are special codes each vendor manages to allow communicate via the SNMP protocol, a common language between your server and the network device. You can edit your OID-s list under **Preferences→ Asset Settings→ Customized SNMP OID-s** tab.

Here you can find a table with a list of common OID keys used by manufacturers of network devices. You can manually add new keys and descriptions for new network devices here, if you choose. It is recommended to add a clear display name for the device you wish to list. If you add more information, for instance, where is the device located and who is responsible for it, you will be able to see this information in SysAid, too.

The Mapped Field column helps you determine where the information will be presented in the asset page in SysAid. You can choose the appropriate field from the dropdown menu.

An example for a customized OID you might want to add is the Toner Level of your printer. Find in the documentation of your printer the OID that holds this value, and add it to the customized OID list. Map this OID to a custom field and change its name. You can do so, under **Preferences→ Customize→ Translate**. To learn more about adding your own customized fields, please read Chapter 7 in this guide, under: **Benefits of the Translate Option - Customizing the Menu Options and Headings**

Troubleshooting

Check to see if the **'General'** icon G appears in **My Network Assets**

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Now review the **My Network Assets** page, carefully check to see if the **'General'** icon appears next to an asset entry. If you see this icon it signals a communication problem between the asset and the SysAid Server. Consult the **Troubleshooting Section** in our **End User Portal**, or in our website for further details (http://www.ilient.com/troubleshooting.htm). You can also contact the Ilient support team (support@ileint.com).

Verify that All Assets are Present

If you are not sure that all of the assets in your organization have been identified by SysAid, in **My Network Assets**, click on **Search Assets** in the side bar menu and perform a search. In the text box, either type the exact name of the asset in inverted commas (" "), or perform a general text search. In the **All Fields** dropdown menu specify the asset type.

If you suspect that an asset is missing consult our **Troubleshooting Section** for further details (http://www.ilient.com/troubleshooting.htm) or contact the SysAid support team.

If you have purchased the asset management/inventory module you will need to deploy the SysAid agent. Instructions for deploying the agent are provided below.

5.2. Deploying the SysAid Agent

Option 1 - Automatically add your assets

The recommended way to add your assets automatically is using the SysAid agent.

The SysAid Agent

The agent is a ***tool***. It compiles the inventory, reports on the clients' machine on network, and has additional associated tools that assist the Help Desk, for

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example the **Hot Key** or **Screen Shots.** The agent is part of what compiles the inventory.

Advantages of the Deploying the SysAid Agent for Help Desk

End users can enjoy the following advantages:

- By pressing the **HotKey** the SysAid end user portal is instantly opened
- Add screenshots to service requests of the reported problem
- Remote Control facility
- An option to define your own customized icon which will be deployed to your workstations
- You have an option to have the Agent require the end user to login. This is a useful option for shared workstations which have a generic login, when end users want to submit SRs with screenshots and asset details.

Described below are a number of deployment options you can choose from.

Default Agent Settings

By choosing to install the Administrative Tools or by performing Manual Installation of the SysAid agent you will be provided with default settings agent configuration.

Deploying the SysAid Agent

All computers that are connected to the network need a copy of the SysAid agent, otherwise SysAid will not be aware of them.

The **Downloads** page allows you to install **Administrator Tools** (a part of the administrative tools is the deployment tool), thereby automating deployment

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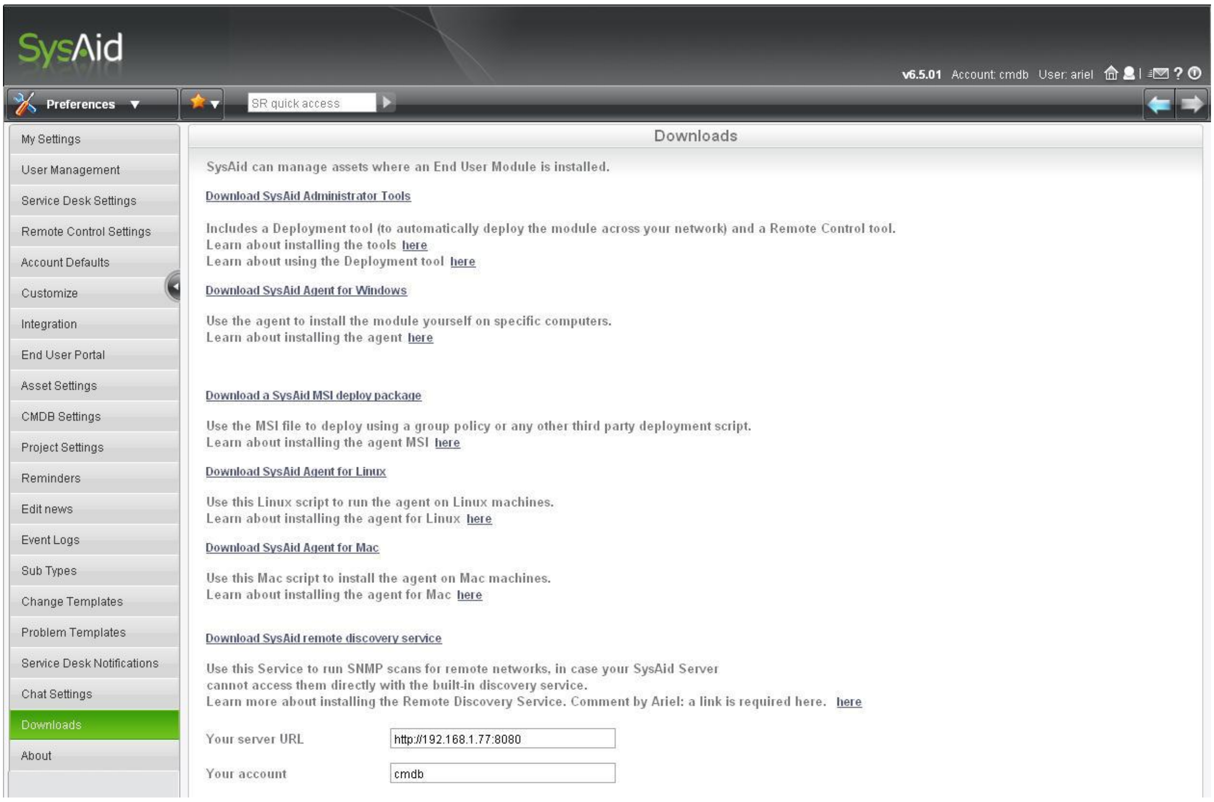
across your network. Alternatively, there is the option to deploy the **SysAid Agent for Windows** the **SysAid Agent for Linux**, or the **SysAid Agent for Mac** either using a login script or performing manual deployment. You can also choose to download a SysAid MSI deployment package from this page. All account information necessary for installing SysAid agent (Account, URL Serial key for account) can be found in the **Downloads** page as well.

50 Downloads Page



To access this page, in the main menu, click on **Preferences →Downloads.**

Table 1: Downloads Page Items Listing the Three Deployment Options

Item	Description

SysAid Administrator Tools	Click this link to commence installation of the SysAid Admin Tools with a Setup Wizard. (Applicable for Windows NT-up to 3.6 SysAid version, Windows 2000, and Windows XP computers). As a result of an installation of the Administrator Tools, you will have access to the Deployment Tool and to the Administrative Remote Control Tool. If this installation fails or is not applicable, e.g. your network has firewalls or anti-virus, continue to try the other options below, or please consult our online Troubleshooting Guide http://www.ilient.com/troubleshooting.htm
SysAid Agent for Windows	Click this link to perform automatic deployment with a login script for Windows. Manual Installation can also be performed with this option, and provides default agent settings.
SysAid Agent for Linux	Click this link to perform automatic deployment with a script for Linux. Manual Installation can also be performed with this option.
Download a SysAid MSI deploy package	For instructions please go to: http://ilient.com/msi.htm
SysAid Agent for Mac	For instructions please go to: http://ilient.com/mac_agent.htm

Three Options- **Deployment Instructions**:

Option 1 **SysAid Administrator Tools:** Automatic deployment with the deployment tool (Windows NT- up to 3.6 SysAid edition, Windows 2000, and Windows XP computers):

1. Click **SysAid Administrator Tools**. Save the file to your hard disk.
2. Run **Deploy SysAid**.
3. Click on Under Microsoft Windows Network. Make certain that you see all of your network computers.
4. In the **Action** menu you should choose the appropriate option (for example **Deploy to selected computers)**; make sure you select computers this action applies to.

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5. If you do not see your computers listed contact the SysAid support team.
6. Finally to uninstall, select computers and click on the **Uninstall from selected computers** button.

For more detailed instructions, please read Guide 4: Administrator Tools Installation Guide, *http://ilient.com/down/Administrator_Tools.PDF* followed by Guide 5: The Deployment Tool Guide, *http://www.ilient.com/down/deployment.PDF*. Both documents are also available at http://www.ilient.com/.

You should proceed either to automatic deployment with a login script, or to manual deployment if you did not choose **SysAid Administrator Tools**.

Option 2 (a) **- Automatic deployment with a login script**

Microsoft Windows

1. Click **SysAid Agent for Windows.** Save the file, named *SysAidAgent.exe*, to a location that is shared on the network by all computers. If you do not, verify that you put it in several places to caver all computer locations.

2. For Windows add the following lines to the network login script, overwriting the tags with the appropriate values. It is not recommended to cut and paste the text, as **tags < > are not permitted in the login script**. Ensure that there is a space before every backslash "**/** " in the login script.

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<Path to SysAidAgent.exe>\SysAidAgent.exe /VERYSILENT /URL <server URL> /account <account id> /serial <serial number> /install once /AllowRegister <Y or N> /AllowRemoteControl <Y or N> /SubmitSRShortcut <caption of the submit service request shortcut> /HotKey 122 /Interval /ConfirmRC <Y or N> /RandomMachineID N /AllowSubmitSR <Y or N >

Table 2: Description of the parameters in the login script

Parameter	Description
URL	URL of the server SysAid is running on.
account	The account ID
serial	Your SysAid serial number located on the bottom of the **Downloads** page on your local SysAid Server.
install once	This option will only install the SysAid agent if it was not installed before. If SysAid was already installed it will not overwrite. Therefore you should delete install once if you are now upgrading or redeploying SysAid.
AllowRegister	Permitted values are Y or N
AllowRemoteControl	The permitted values are Y or N.
SubmitSRShortcut	This is the name your organization gives the caption of the submit service request shortcut, if greater than one word enclose it in " "
HotKey	The hotkey number. Once SysAid is deployed across your network, users will be able to launch the system by clicking a hotkey, for example F11. Yet, login script does not understand F11, but rather identifies a location of a key within the keyboard from the registry, and assigns it according to its numeric placement (e.g. F11 has a value of 122). Please do not set F12 as your hotkey with Windows NT4 and Windows 2000/XP, since in these the F12 is reserved for use by the debugger.
Interval	The agent poll interval, in seconds. To monitor computers, SysAid will occasionally scan them, viewing their details and updating the information it displays. By default, SysAid will run as a service on computers, contacting the server every given number of seconds.

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Parameter	Description
ConfirmRC	The permitted values are Y or N. Optionally, when an administrator attempts to remote control a computer, the user of that computer must confirm the remote control.
RandomMachineID	Generate random machine ID. The permitted values are Y or N. Generally the default will be N.
AllowSubmitSR	To have a shortcut to SysAid placed on your desktop and to activate the hotkey insert **Y**. Alternatively, choose **N**, not to have a shortcut to SysAid and to deactivate the hotkey.

URL, account and serial elements are mandatory. The explanation here provides a clear definition of the parameters, the valid options, and example of successful login script.

Example with completed values:

```
z: \sysaidagent.exe /VERYSILENT /URL http: //10.0.0.10:8080 /account SMITH /serial 3333333 /install once /AllowRegister N /AllowRemoteControl Y /SubmitSRShortcut SysAid /HotKey 122 /Interval 30 /ConfirmRC N /RandomMachineID N /AllowSubmitSR N
```

Option 2 (b) **Automatic deployment with a script:** ***SysAid Agent for Linux***

1. On the **Downloads** page click **SysAid Agent for Linux**, and save the file which is named SysaidAgent.exe, to a location that is shared on the network.
2. Add your own script. Alternatively, we can provide you with a compressed TAR file, and then you can open and run the script in your computer scheduler.

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Please proceed to read the **manual installation** instructions if the aforementioned options have failed, or you simply prefer to opt for manual installation.

Option 3 **Manual Installation for Windows and Linux (Default agent configuration)**

1. Click **SysAid Agent for Windows** or **SysAid Agent for Linux**.
2. Save the file, named SysAidAgent.exe, onto your hard disk.
3. Execute the file from each computer in the network, follow the instructions, and complete the installation. Each computer that logs on to the network will automatically execute SysAidAgent.exe and install the SysAid end user module. From that moment on, SysAid will monitor the computer. Some assets, such as printers, can only be added manually.
4. This option deploys the agent with default settings.

Uninstalling the SysAid Agent

In the event you want to uninstall the SysAid agent, you should choose one of the options below depending upon how the SysAid agent was originally deployed:

- SysAid Administrator Tools - to uninstall the SysAid agent, you can use the deployment tool to un deploy the client from every computer. Click on: **Deploy SysAid → Action → Undeploy from selected computers**.
- Manual installation – Go to **Start → Control Panel → Add/Remove Programs.**
- Login Script - "C:\Program Files\SysAid\unins000.exe" /verysilent

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To uninstall the SysAid server go to **Start → Control Panel → Add/Remove Programs.**

To verify that SysAid has been removed check to see if you have SysAid server directory on your computer. If you can still see the directory, simply delete the directory.

If you plan to reinstall the SysAid server at a later date, save the contents stored within the built-in database; if you will not do so, you will lose all of the contents of the database.

Related Guides and Reading

Guide 3: Getting Started Guide

http://www.ilient.com/down/getting_started.PDF

Guide 4: Administrator Tools

http://ilient.com/down/Administrator_Tools.PDF

Guide 5: The Deployment Tool

http://www.ilient.com/down/deployment.PDF

Guide 6: The SysAid Agent

http://www.ilient.com/down/agent.PDF

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Chapter 6 Monitoring Module

Monitoring is an extremely useful IT management tool, that enables you not only to address problems and malfunctions that have already occurred and have been reported on these via service requests, but to be notified about possible failures in your network and thus proactively prevent these in advance. Also, the SysAid Monitoring module will allow you to exercise better control over your network, and keep your assets from unwanted software and hardware. Thus, the monitoring tool can save you a great deal of time, costs and extra work.

The SysAid monitoring tool ensures utmost functionality of all your network components, from your most vital network applications, your servers, and down to each individual workstation on your network.

The monitoring tool is divided into two main sections: servers monitoring and workstations monitoring.
A server is a computer that delivers information and software to other computers on your network, while a workstation is a client computer connected to your network.
Working with our new SysAid Monitoring tool will raise your IT practice to a whole new level. You will be amazed by how many complications can simply be avoided in advance!
You can configure the necessary checks that will be preformed on each asset or on a group of assets yourself. You can also create special templates composed of different series of checks that can then be assigned to the relevant assets.

SysAid takes a proactive approach and allows you to define customized notifications on monitoring warning signals and alerts be sending customized emails or text notifications, and even allows you to automatically open Service requests. Constant tests for memory usage, hard disk usage, vital OS services and processes, network services, software and hardware updates and more. You

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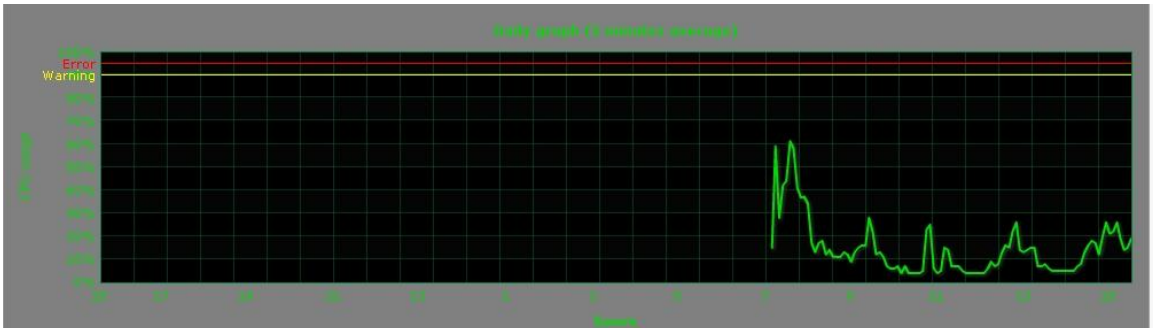
can see a visual representation of all the monitoring tests on daily, weekly, monthly and yearly graphs.

Part of the monitoring module is included in the core product, while additional functionalities are available only in the Full SysAid Edition.

51 Monitoring Graph



Please see the SysAid Monitoring Guide for full details on this module :
http://ilient.com/down/monitoring6.pdf

Related Guides and Reading

Chapter 4 - Introduction to help desk

Guide 9 - The Database:
http://lw6.ilient.com/dede5t/database_guide.pdf

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Chapter 7 Advanced Configurations

In this chapter we cover those advanced configurations throughout SysAid modules: **Help Desk, Asset Management and Tasks/Projects.** The second half of the chapter contains a mini-guide for administrators who want to learn the standard features.

7.1 Tools for Customization in SysAid

7.1.1 Translate

SysAid administrators can adapt and modify the interface of SysAid using the **Translate** feature in order to comply with the internal settings of a company, for example language, syntax, style and layout.

Multilingual Option in SysAid -Translate

Languages Ready to Use

SysAid offers the administrator the opportunity to select the following languages for immediate set up: *English, Dutch, French, German, Hebrew, Italian, Spanish and Russian.*

1. To set a language, go to **Preferences → Customize → Translate**.
2. In **Locale**, select the language your company would like to use.
3. In order for the translate setting to take effect, you also need to set your **Locale** on the **My Settings** page under **Preferences**.
4. You should set that language as a default locale for new users under **Account Defaults**.

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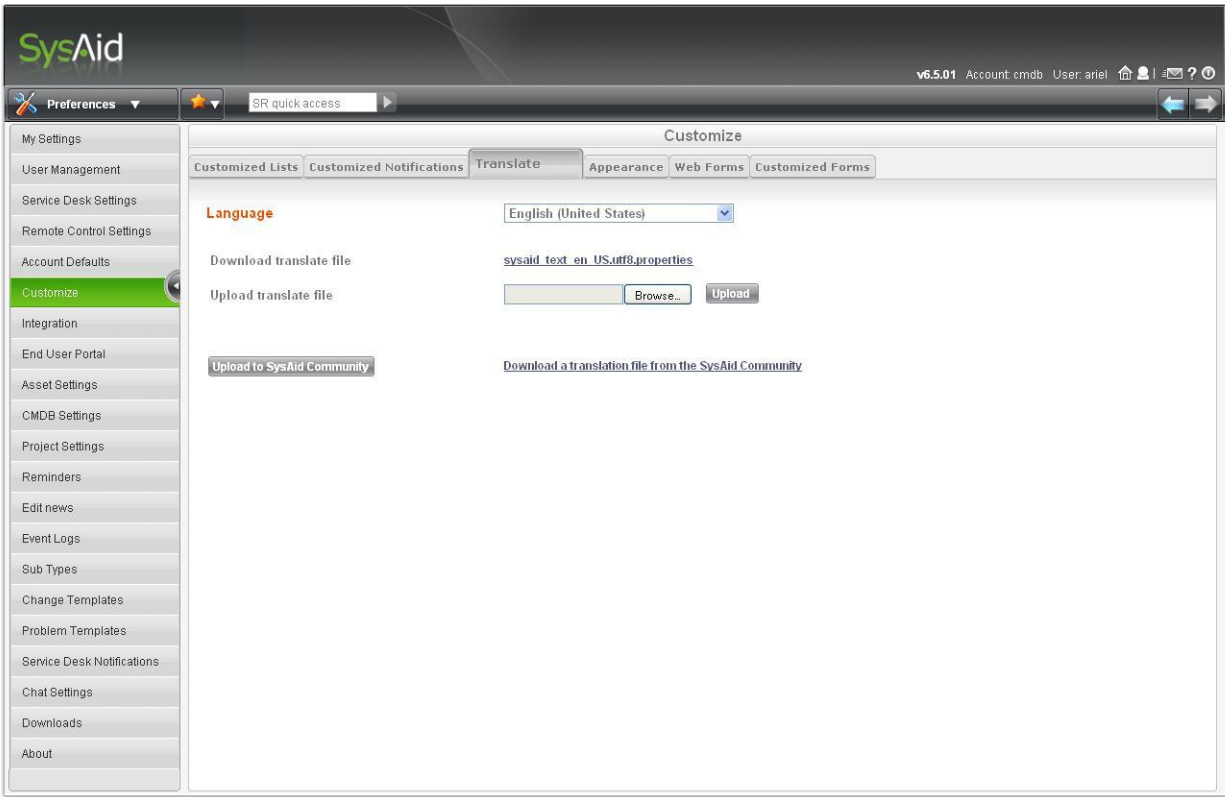
52 Translate page



Overview of How to Make Your Own Translations

It is possible to translate SysAid interface to your own language, for the benefits of both administrators and end users.

1. For languages other than *English*, *Dutch*, *French*, *German*, *Hebrew*, *Italian* and *Spanish* SysAid can be easily customized. The administrator will need to select in **Locale** and **Language** Settings the new language, in **My Settings** (for him/herself), and in **Default Settings** (for the users). You can also look for translations to your local language in the SysAid Community, or help others by sharing the translation you have made there. Go to **Admin Portal→ Community→ Resources→ Translations**, or simply follow the link below:
   http://ilient.com/Sysforums/forums/list.page?listType=translations

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2. The administrator should perform a one time translation of key terms. Download the text file in the **Translate** page.

3. Save the file to your own computer. For that purpose should use a text editor program such as Notepad.

4. Translate the texts, save the file, and then upload it, again, from the **Translate** page in SysAid.

Benefits of the Translate Option – Customizing the Menu Options and Headings

1. This option provides you with the flexibility to change one or more words used throughout SysAid. For example, you may be using the English locale, and want 'service requests' to be called 'trouble tickets'.
2. To make this change go to the **Translate** page, and choose the **English** locale. Download the text file to your computer, edit it in a text-editor: locate the words 'service requests' and change them to 'trouble tickets'. Save your change. Upload the text file from the **Translate** page. Now, wherever the words 'service requests' had appeared in SysAid, you will see the words 'trouble tickets' instead.

Modifying Menu Names

Bolder changes can be made; for instance, the titles of the menu options located on the sidebar in SysAid can be also modified. For example, you can rename **Tasks/Projects** to something more specific or relevant to your IT team, such as 'Software Installation'.

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1. To change any of the menu headings on the menu sidebar go to **Preferences → Customize → Translate**. Download the text file, save it to your computer and open it with a text editor such as Notepad.
2. To find in the text file the menu option you wish to rename, you should search for the string 'leftmenu.'. For example, the **Task/Project** menu option will be found in the caption box next to the string 'leftmenu.project'.
3. The following interactive menu items located horizontally on the top menu of SysAid can also be renamed: **SysAid, Account, Time, Home, Message, Help,** and **Logout.** In the **Translate** page they are all preceded by the string 'topmenu.' followed by the name of the menu item itself. To change the menu name, to the right of the equals sign (=) type the new menu name,
4. Save the changes you have made in the text file.
5. In the SysAid **Translate** page, upload the file you have just edited. The changes will take effect immediately.

Obviously, you may also want to translate SysAid into a language it does not support. Choose the appropriate locale and translate each word on the **Translate** page. If you are ready to share your translation with other SysAiders who speak your language, please contact Ilient support support@sysaid.com.

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7.1.2 Customize Icon

In SysAid you will encounter two types of pages: A **form** and a **list** page.

Form - A form page contains a summary of information on a specific service request or any other SysAid entity (such as catalog item, supplier, user, etc.)

List - If you select **Help Desk**, **Tasks/Projects** and **Asset management→ Asset** List from the main sidebar menu in SysAid, you will be taken to a list page. (There are also lists of many other SysAid entities such as catalog items, suppliers, users, etc.) Here you are provided with a table listing of the contents of service requests, projects and your assets. By clicking on a row entry you can navigate to a specific service request, project or asset, which is a form page.

Both the form and the list page can be customized in SysAid by clicking on the **Customize** icon.

Customize the Form

Redesigning Forms

This option is available in the full edition only. To learn more about SyAid Full edition, please follow this link: http://ilient.com/fullversion.htm . SysAid is extremely flexible; it will let you redesign its forms. You can add, remove, and change the location of the fields. Wherever you see the **Customize** icon: this indicates that the current form may be redesigned. New fields may be added, including new customized fields, and in the Help Desk portal even a new page can be added to SysAid.

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Customize the Form

1. To add additional fields to a form, for example to the **Mobile** form- where you can submit service requests received via a mobile phone- (**Help Desk → Mobile**) click on the customize icon . The **Design Form** popup opens.

53 Design Form

1. In the **Available Fields** select fields to appear in the **Mobile** page. Using the arrow button move the fields to the **Visible Fields** box. Click **Save.**
2. It is possible to add your own customized text fields, or a dropdown menu field or an integer field. All fields that start with the word "custom" in the **Available Fields** list can be customized by the administrator in the **Translate** page. To do so go to **Preferences→ Customize → Translate**, and download the text file in order to edit it. The following fields detailed in the table below can be edited by typing in the text file the new name on the right of the equals sign (=). These fields can be customized for any of the Help Desk screens.
3. Scroll down the page and click the **Save** button.

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4. Return to the **Mobile** page, and click on the **Customize** icon. Repeat step 2 (above).

Create a New Form Tab in the Help Desk Interface using the Customize icon

Choose the particular fields you would like to appear on your new tab and a name for the new tab.

1. To create the page, go to any of the pages of a service request in the help desk interface, for example **General Details**. Click on the **Customize** icon. The **Design Form** popup screen opens.
2. In the **Design Form** click the **New Tab** button, on the bottom of the screen. In the **Tab** caption, type the new name of the new tab you wish to create.
3. From the **Visible Fields** box add or remove fields to display on the new tab using the arrow buttons.
4. You can choose that the field will be of a view-only type, by ticking the checkbox **View Only** in the Customize popup screen. This will prevent users from editing the field. You can also limit the fields in the form to be edited only by certain administrator groups. In the customize form popup screen, check the option of limiting this tab according to group, and click the three dots button to choose the relevant groups.
5. You can choose to limit the permission to see this tab only to specific administrator groups. For example, you might create a tab where you store passwords. You can now restrict this tab to be seen by only the administrators you choose. In the customize form popup screen, check the option 'Visible for User Groups', and click the three dots button to choose the relevant groups.

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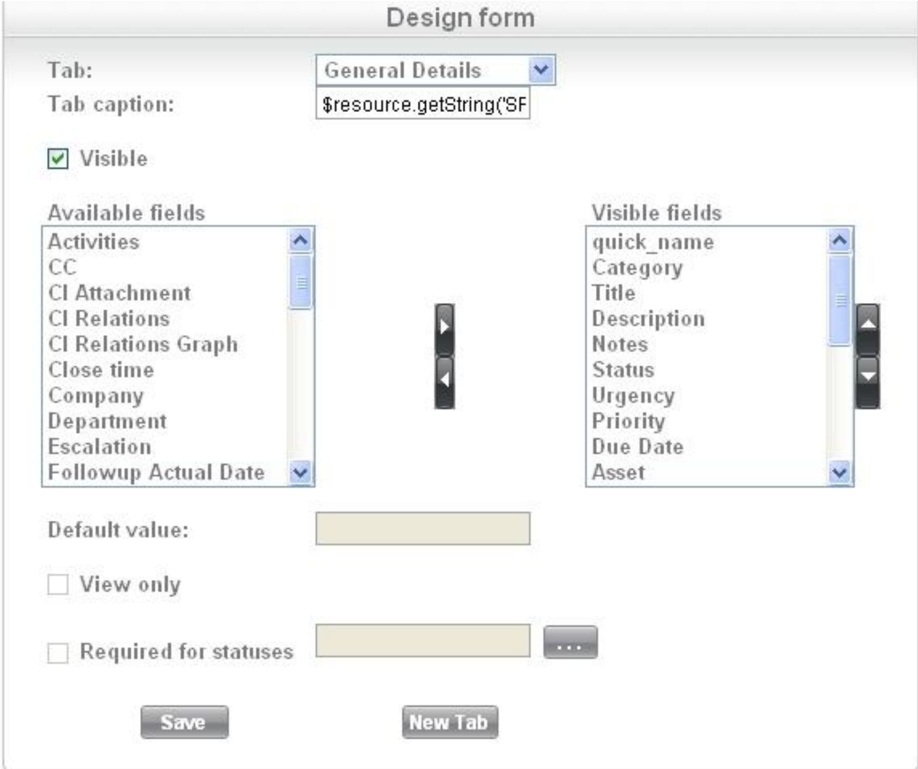
54 View Only checkbox in the Customize form popup screen



6. Click **Save**.
7. Your new tab will now be available for viewing.

Adding Your Own Customized Lists

All items contained in the dropdown **List** field in the **Customized Lists** page (**Preferences → Customize → Customized Lists**) can be formatted into a dropdown menu. There are two options in SysAid:

1. Make a dropdown menu from the fields already available in **Customized Lists** or
2. Set up dropdown menus based on new customized field names by editing Custom List 1 and Custom List 2 in **the Translate** page.

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Set up the dropdown menu field.

1. If you want to create a new dropdown menu name entirely, first go to **Preferences → Customize → Translate**.
2. To add a new list name, download the text file and save it to your desktop.
3. In the text file, look for the fields: cust_list1 or cust_list2. Each of these fields is preceded by letters that indicate which interface they pertain to (see table 3 for the complete listing).
4. Replace the name of the list, which appears on the right of the equals sign (=) with the name of your new dropdown menu.
5. Scroll down to the end of the page and click **Save**.
6. Upload the file from the **Translate** page.

To create a new menu field:

1. Go to **Preferences → Customize → Customized Lists.**
2. In the **List** dropdown box select the name of your new menu.
3. Note: When editing **Status** Items in **Customized Lists**, each item in the **Status** menu must be of class "Open", "Closed", or "Deleted/Ignore". When you modify/create status items, you will be asked to associate each one with a class. SysAid handles requests based on this status class. For example, if you add the status "Solved" of class "Closed", then every time you change a service request to "Solved", SysAid will update the close time. SysAid reports (described later in this manual) will consider the request to be closed.
4. Note that it is impossible to delete list entries that are currently in use. For example, you cannot delete the Pending status when there are pending Service Requests.

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5. In the **Key** box, you should use a numeric figure. Add the text description in the caption box. Click **Add** to save this line entry.
6. You can adopt any numerical coding sequence (1, 2, 3, 4, 5 or 10, 11, 12, 13, 14); the only rule is that you cannot use the same number twice as this causes the entry to be overwritten. Do not punctuate numbers, do not use commas "," or full stops "."
7. Once you have added all entries to the menu, click **Save.**
8. Finally go to the page where you want to add the dropdown menu field. Click on the  **Customize** icon.
9. A pop screen will open, called **Design Form** or **Customize List**. In the box called **Available Fields** you will now see the newly named menu field. Select it. Click on the arrow button to move it to the **Visible Fields** box.
10. Click **Save.** This new dropdown menu will now be updated and appear in the page you selected.

Customize the Form and the List Page

Customize Extra Fields for Entities in the SysAid Enterprise Edition

For any form and list that holds information regarding an entity in SysAid- such as Service Requests, Tasks, Assets, Projects or CI-s, you can add your own customized fields. The advantage of adding your own fields to the forms and the lists of your SysAId entities is basically that you can determine what details you wish to add to the information about this entity. For instance, you may want to

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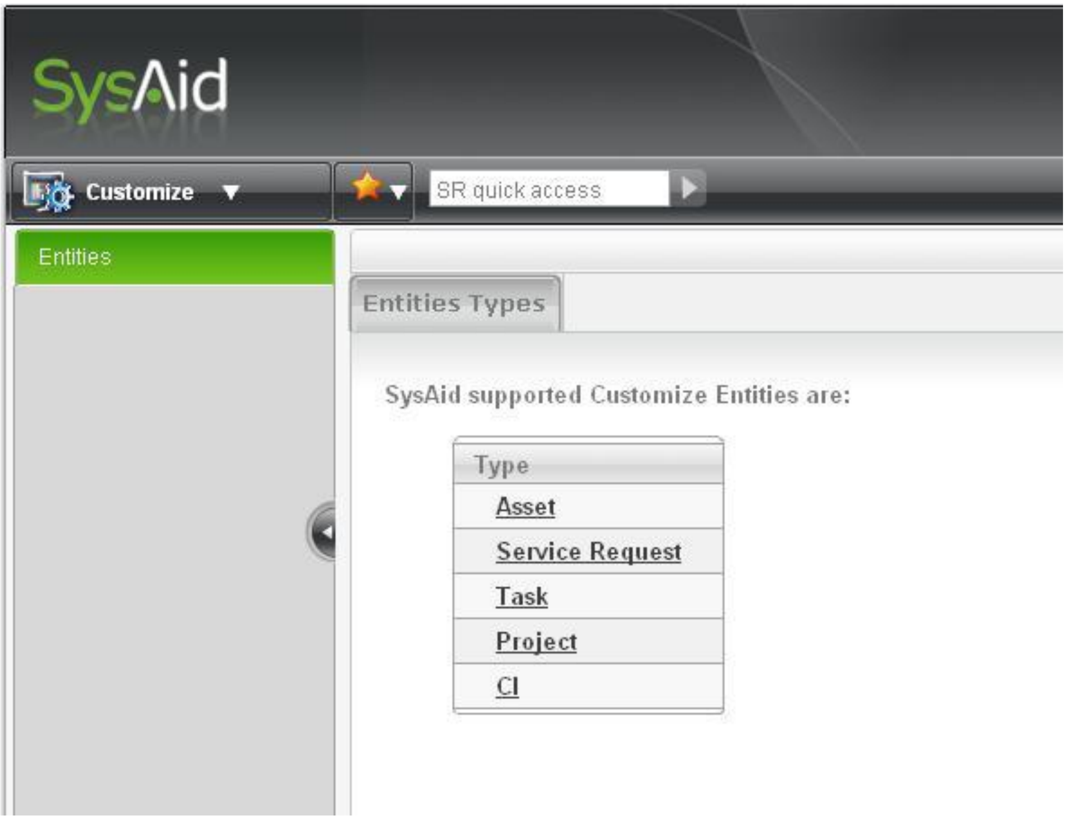
add to your task form the costs that are involved in performing it. You can add a customized field that receives numeric values to the task form, so the administrators will be able to fill in the costs involved in this task.

To add your own customized fields, go to **Customize** from the main left menu.

You will reach a table with a list of your SysAid entities: Service Request, Tasks, Assets, Projects and CI-s.

55 Customizing fields in SysAid Entities



Click the entity you wish to add a customized field to.

You will reach a page with a table showing your customized fields for this entity. To modify a customized field, click its row entry. To create a new customized field for this entity, click the **New** icon .

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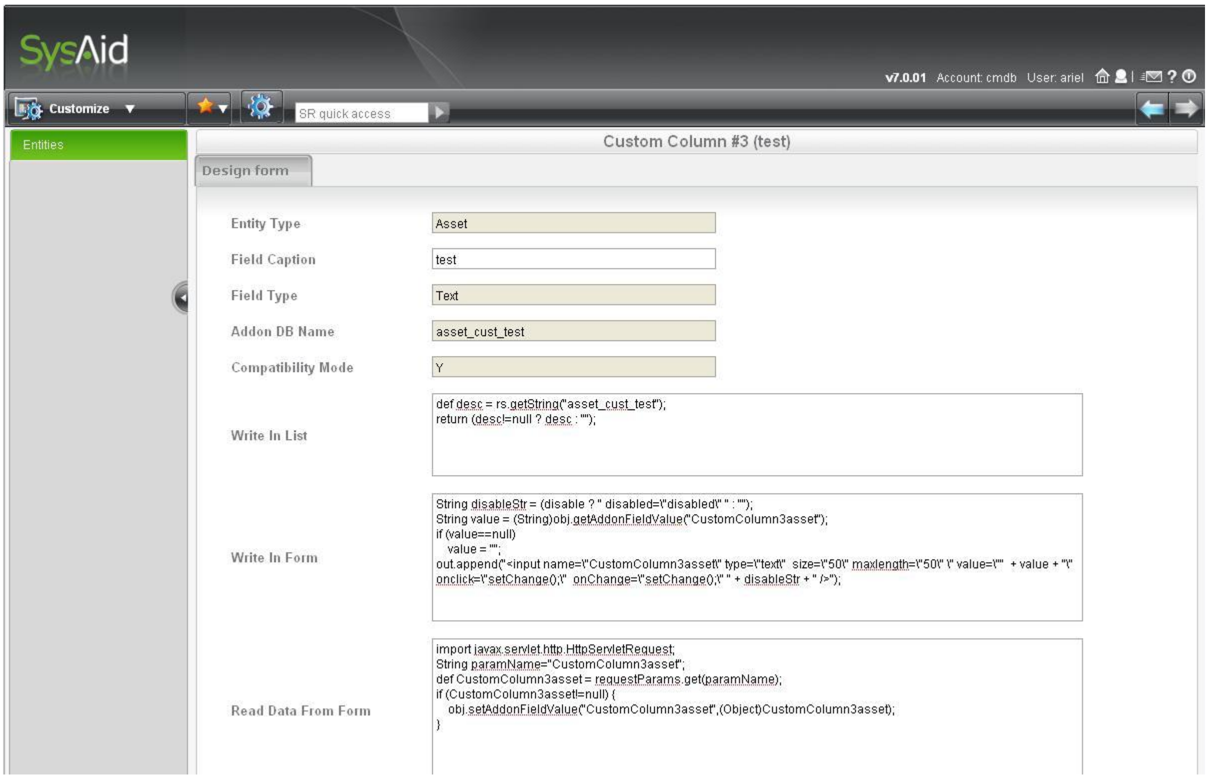
You will reach a form that allows you to customize the new field. You can choose a name of the field to be shown in the customization popup screen that opens when clicking on the cog wheel icon, in the **Field Caption**.

56 Edit your customized field



Choose the type of your field. You can choose between a short text pane, a field that can be filled in with numeric values, a filed with a textbox for long texts, a field that receives date values, or a list field. You can also insert a name for your new customized field as it will appear in the database.

Click the OK/Apply button to keep your new customized field.

Now you will be able to use this field in the form and the list of the entity. For instance, in case you have added a new customized field called "Costs" to your service request, a field that receives numeric values, you will be able to add this field to your Service Request form in the following way:

1. Go to Service Desk→ Click a row entry of one of your requests, or click the **New** icon to open a new request.

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2. In the SR form, click the cog wheel icon
3. In the popup screen, you will be able to see the new filed you have customized under the **Available Fields** box. Use the arrow button to move it to the **Visible Fields** box. You may also choose to render this field as required, or limit it to specific user groups.
4. Click to save your changes. Now you will be able to view the new customized field in the service request form.

Add New Fields to Customize Fields

SysAid provides the option of customizing extra fields for different SysAid entities. You can define the following custom fields:

- Two text fields named Custom Text 1 and 2
- A long text field named Custom Notes (such as the Notes field for service requests)
- Two dropdown menus named Custom List 1 and 2 (such as the Status/Urgency/Priority menus), the values of which appear in the Customized Lists page under Preferences
- Two (integer) numeric fields named Custom Int. 1 and 2

You can change the caption of these custom fields in the **Translate** page (**Preferences → Customize → Translate**). The names of the fields are self-explanatory.

You can choose that certain fields will be visible in the form under each tab, by moving them from the available to the visible fields in the customizing popup screen, while you are under a specific tab and you click the Customize icon.

Table 3: Fields that can be customized in the Translate page

Field name in the translate page	Field Type	For use
asset.cust_list1	Creates a drop-down menu (text or numeric)	In the asset interface only
asset.cust_list2	Creates a drop-down menu (text or numeric)	In the asset interface only
asset.cust_text1	Adds text field only	In the asset interface only
asset.cust_text2	Adds text field only	In the asset interface only
asset.custom_notes	Adds a note box	In the asset interface only
asset.cust_int1	Adds a numeric field only	In the asset interface only
asset.cust_int2	Adds a numeric field only	In the asset interface only
companycust_list1	Creates a drop-down menu (text or numeric)	In the help desk interface (for company categories)
companycust_list2	Creates a drop-down menu (text or numeric)	In the help desk interface
companycust_text1	Adds text field only	In the help desk interface
companycust_text2	Adds text field only	In the help desk interface
companycust_notes	Adds a note box	In the help desk interface
companycust_int1	Adds a numeric field only	In the help desk interface
companycust_int2	Adds a numeric field only	In the help desk interface
sr.cust_list1	Creates a drop-down menu (text or numeric)	In the help desk interface
sr.cust_list2	Creates a drop-down menu (text or numeric)	In the help desk interface
sr.cust_text1	Adds text field only	In the help desk interface
sr.cust_text2	Adds text field only	In the help desk interface
sr.cust_notes	Adds a note box	In the help desk interface.
sr.custom_int1	Adds a numeric field only	In the help desk interface
sr.custom_int2	Adds a numeric field only	In the help desk interface
project.cust_list1	Creates a drop-down menu (text or numeric)	In the project interface
project.cust_list2	(Creates a drop-down menu (text or numeric)	In the project interface
project.cust_text1	Adds text field only	In the project interface
project.cust_text2	Adds text field only	In the project interface
project.cust_notes	Adds a note box	In the project interface
project.cust_int1	Adds a numeric field only	In the project interface
project.cust_int2	Adds a numeric field only	In the project interface
task.cust_list1	Creates a drop-down menu (text or numeric)	In the task interface
task.cust_list2	Creates a drop-down menu (text or numeric)	In the task interface
task.cust_text1	Adds text field only	In the task interface
task.cust_text2	Adds text field only	In the task interface
task.cust_notes	Adds a note box	In the task interface
task.cust_int1	Adds a numeric field only	In the task interface
task.cust_int2	Adds a numeric field only	In the task interface
user.cust_list1	Creates a drop-down menu (text or numeric)	In the user management interface
user.cust_list2	Creates a drop-down menu (text or numeric)	In the user management interface
user.cust_text1	Adds text field only	In the user management

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Field name in the translate page	Field Type	For use
		interface
user.cust_text2	Adds text field only	In the user management interface
user.cust_notes	Adds a note box	In the user management interface
user.cust_int1	Adds a numeric field only	In the user management interface
user.cust_int2	Adds a numeric field only	In the user management interface
sr.max_support_level	Adds a numeric field only	Admin groups in SysAid can have a defined support level, and an admin from that group will be considered to be part of that level support. Each service request shows a max support level

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7.1.3 VIEWS – Customizing Lists and Creating Views

Customizing Lists

A **View** in SysAid loads field items you have selected to appear on the screen. The view has a name and is easily selected from the **View** dropdown menu located at the top of the page (to the right of the icons).

Views determine which values, and which of their columns (such as “title” or “priority”), appear in lists. Using different views means listing different values and showing different fields. One view, for example, might show only the title and description of new service requests. Another view might show only the category and priority of closed service requests.

You can create your own views. Some views, such as **EndUser**, arrive with the system. The **EndUser** view, for example, controls the lists end users see when viewing their old service requests (End User Portal).

You can create a new view for printing purposes and select only those fields necessary.

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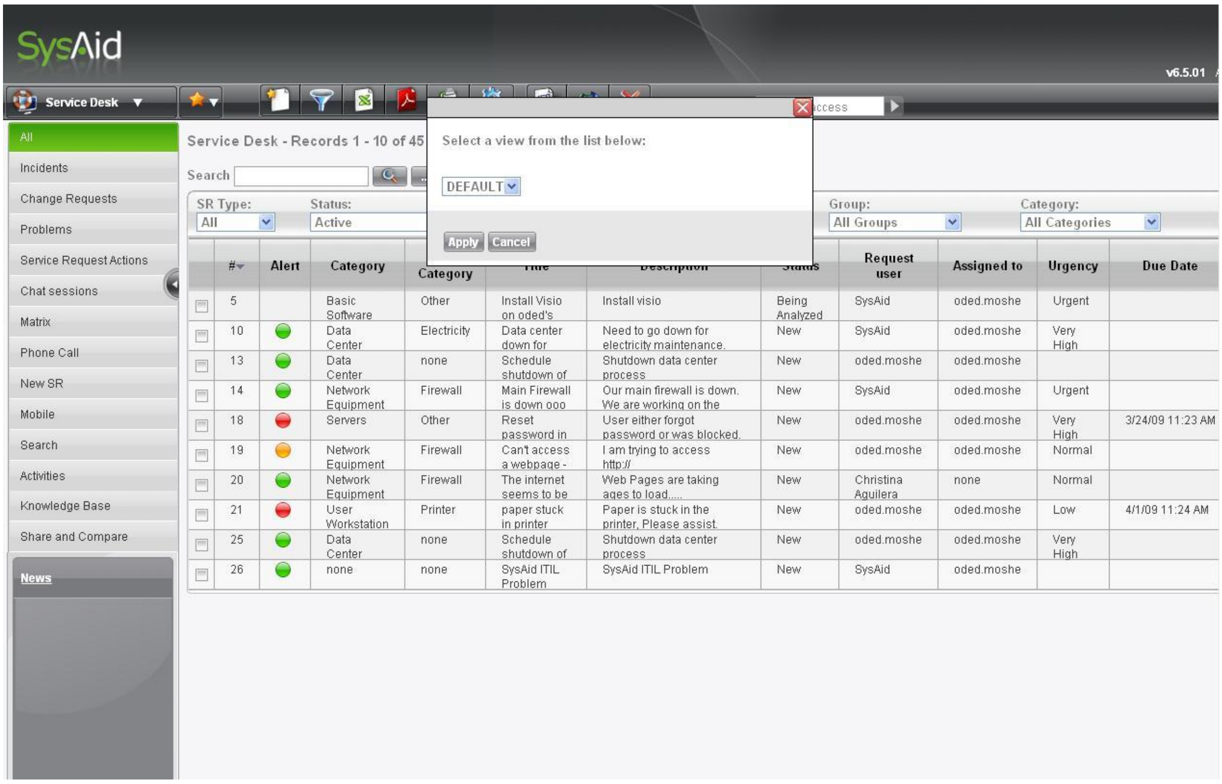
Creating a New View or Editing a Current View

Above lists such as Service Request list, Activities list, or Project and Task List, there is a **View** field. Click the current view name to see a dropdown list with the names of views you can choose to load. Choose a view you would like to edit. For example, to configure which fields end users will see when they check their old service requests, choose the EndUser view.

57 Choose View



To the left of the **View** dropdown menu you can see some icons. Click on the  **Customize** icon. A new screen will open.

At the top of the screen two lists appear:

- Available Columns, which shows the columns available for viewing in the list

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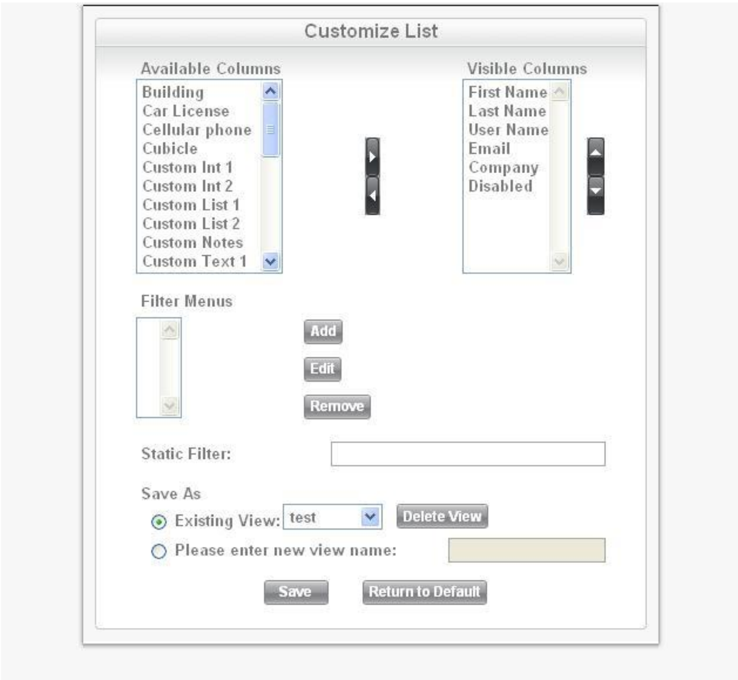
- Visible Columns, which shows the columns currently used in the list

To customize the columns in the view, use the arrow buttons to move columns between “available” and “visible”. Also, use the arrow buttons to change the order of the visible columns. If you are editing the EndUser view, for example, place into “visible columns” the service request fields you want end users to see.

To create a completely new view, once you have selected the fields to appear in the visible columns and the order they will be shown, go to **Save as** and select the "Please enter new view name" radio button. Finally name the view. Click the **Save** button.

58 Customize List



The **Return to Default** button returns the view to its original configuration.

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A note about changing the view name

Ensure that when you create a new view you click on the:

"Please enter new view name" radio button and give the view a new name.

If you will not do so, your new view will be saved as "Default" view and therefore you will lose your original default settings. Making changes to a view and saving them as a Default view is not advisable, as it will seriously interfere later on with downloading new SysAid upgrades.

Dropdown (Filter) Menus

Decide which dropdown menus you would like to appear.

You may decide whether to sort the dropdown lists alphabetically or according to ID under **Preferences → Customize → Customized lists.**

The following dropdown (filter) menus appear as default already in SysAid:

Service Request List:

- Status
- Assigned to
- Group
- Category
- Urgency
- Priority

Asset List:

- Group
- Belongs to
- Type

Project List:

- Category
- Status
- Manager

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Task List:

- Project
- Category
- Status
- User

If you would like to add another dropdown filter, please contact our support team support@sysaid.com and we will help you to create additional dropdown menus.

Removing Dropdown (Filter) Menus from a View

1. To remove a dropdown menu from a view go to the relevant page and click on the **Customize** icon.
2. In the **Customize List** popup screen, select from the **Filter Menu** the dropdown menu you wish to remove. Now click the **Remove** button.
3. Save this view, either by selecting a name from **Existing view**: (dropdown menu) or by selecting and creating a new view name. Do not save these changes to the **Default** view.
4. Click the **Save** button.

To reinstate the dropdown menu at a later date, from the **Customize List** popup screen, you have two options. Either:

1. Click on the **Return to Default** button; all the dropdown menus will be reinstated. Now save this view.
2. Alternatively go to a different view that contains the dropdown menu you wish to reinstate. Click on the **Customize** icon. From the filter menu click on the dropdown menu you want to reinstate, click the **Edit** button. A **Filter Menu** popup screen will open.

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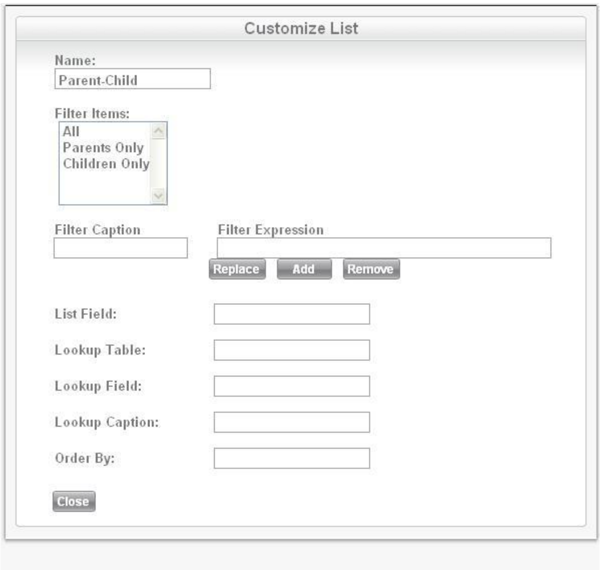
59 Filter Menu



3. Make a note of all the filter and menu field details or print the page off as you will use them to reinstate this dropdown menu in your own view (see step 5).
4. Now go to the View that is missing in the dropdown menu. Click on the  **Customize List** icon; in the **Filter Menu** box click the **Add** button.
5. Proceed to complete all the blank caption boxes in the **Filter Menu** box (using the details you printed off in step 3). Click **Close**.
6. You will be returned to the **Customize List** popup screen, now **save** the view.
7. Finally press the **Save** button.

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Option - Setting up a Static Filter within a View - Contact SysAid for Assistance.

No need to worry that your employees have reviewed and responded to all outstanding urgent service requests or tickets. With a static filter in SysAid you can command SysAid to list in the view those service requests that meet certain criteria. This will help to maintain the high standard of service your help desk provides.

A static filter can determine that certain fields will always be included in a certain view, even if not chosen in the dropdown menu. For instance, if you wish to ensure that the view used by employees will always contain certain kinds of service requests, such as new, open, and responses to previous emails, this can be set up in static filters. Escalation rules can be built into the static filter as well, so that your organization can ensure that it does not overlook any outstanding requests or issues.
Contact support@sysaid.com with a design for the static filter and we will help you set it up.

For creating static filters, you need to understand relational databases and have a familiarity with the database used by SysAid. Describing the structure of the database used by SysAid is beyond the scope of this manual.

Please consult *Guide 9: the database* guide for this information.
http://lw6.ilient.com/dede5t/database_guide.pdf

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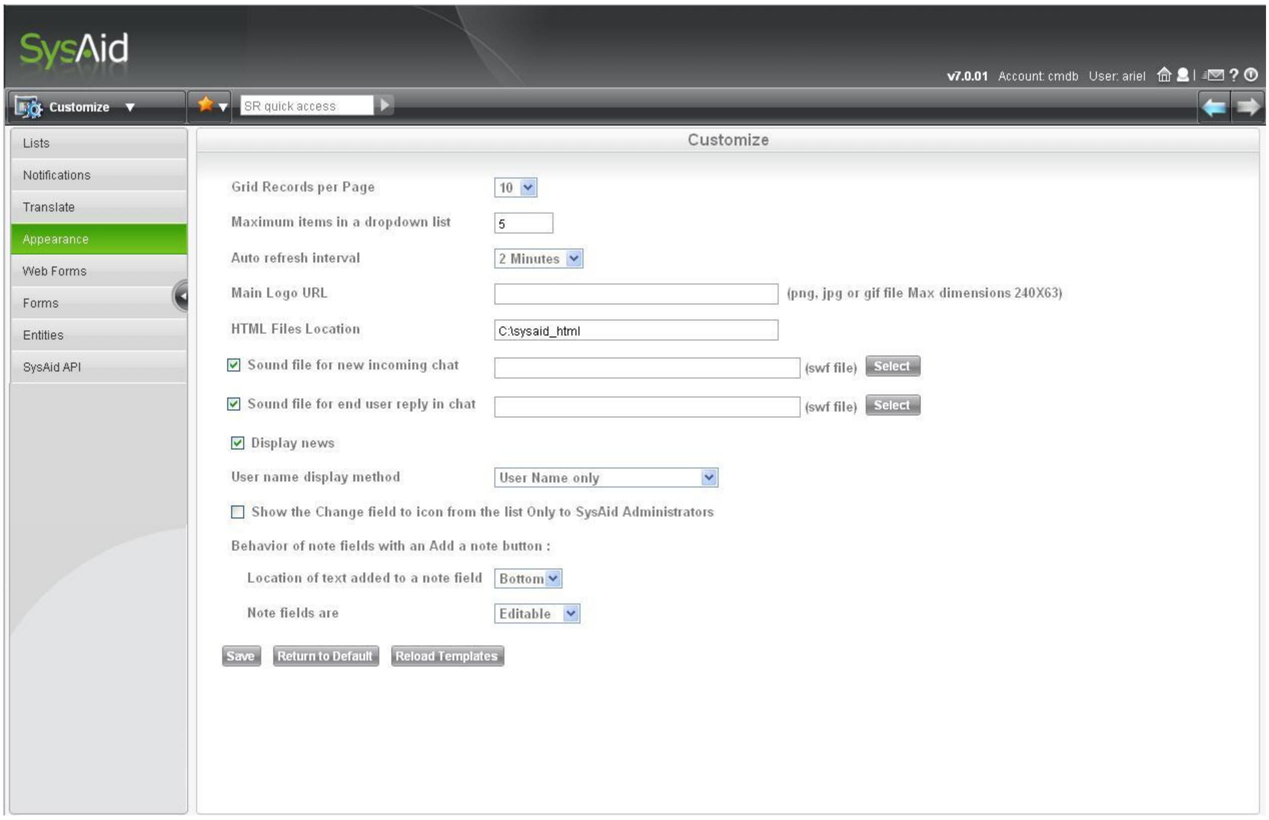
7.1.4 Customize Appearance

60 Appearance Menu



On the main left menu, click the **Customize** button, and from the sub menu choose **Appearance**. This page presents the administrator with the opportunity to customize the SysAid interface with his/her own selection of **colors**, **font settings** and determine the **Auto refresh interval**.

Under this menu you can decide how many lines you will be able to see in all your SysAid lists. Choose form the dropdown menu your desired grid records per page.

You can also choose to customize your dropdown menus and ask SysAid to present the dropdown menu in a separate popup screen for longer lists. Choose the maximum items that will appear in a combo box (dropdown menu). If the

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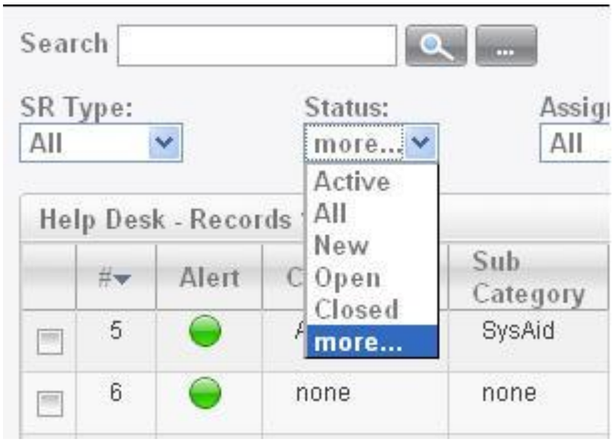
list contains more than the number you have set, instead of a dropdown menu, a button will appear and allow you to open the list in a separate popup screen where you can search sort and select the values.

61 Dropdown menu with an option to see as a separate popup screen.



There is also the option of adding your company logo URL, to add sound files that will be used in your chat console, to check the box if you wish to display the news throughout SysAid interface, and to choose the location of notes fields and whether they will be open for editing. You can also choose to allow only SysAid administrators to use the "Change SR Field to" button in the helpdesk list view, by checking the relevant box.

Choose the display method of user names throughout SysAid, by selecting from the dropdown menu. The available options are: user name only, first and last name, or both user name and first and last name.

By checking the box in this page you can choose to allow only SysAid administrators to use the "Change SR Field to" button  in the helpdesk list view.

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However, these options are only available in the full edition of SysAid. To learn more about the SysAid Full edition, please follow this link: http://ilient.com/fullversion.htm

Edit the HTML and Upload Changes in the Appearance Page

SysAid interface is displayed using HTML code. If you are familiar with HTML code, you can edit the **End User Portal** and Login pages.

1. Go to ...\SysAidServer\root\WEB-INF\conf\.
2. You will find a folder called 'html'. Copy this folder to another location - preferably, not in the SysAidServer folder).
3. Edit the HTML files in the new location, design the appearance which is suitable to you, and save your changes.
4. In SysAid, go to **Preferences → Customize → Customized Forms** tab.
5. In the "HTML Files Location" field, point to the new location of the HTML files. The path you point to should be a full-local path.
6. Save your changes.
7. Click the **Reload Templates** button to update the changes you made in the HTML files. You should always click this button after any change you make to the HTML files.
8. Open the relevant pages to verify that your newly designed End User Portal and Login page are displayed.

One of the options is to create different forms for the **End User Portal** that will be used for submitting service requests that belong to different categories.

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Using interfaces other than SysAid to create web forms

SysAid provides you with the option to add service request submission forms to any existing web page. For example, you might want to let users submit SysAid service requests from your company home page. Go to **Preferences → Customize** and go to the **Web Forms** tab. Click **New Form**.

Fill out all the details in the form. Choose fields that you would like to appear in your service request submission form. Preview your form by clicking **Preview**. When you have finished designing the customized form, click on the **HTML Code** tab. Copy the HTML into any existing web page. Users can now submit service requests using your web page.

7.1.5 Tags (for automatic notifications)

Service requests can prompt automatic notifications (messages) in SysAid. These messages are based on editable templates. For example, there is a template for the automatic email notification sent to users who submit a service request. There is another template for the email sent to an administrator when a service request escalates.

These templates use *tags* to make them unique from one another. Tags are placed within the message. They change based on the service request they apply to.

For example, whenever a service request escalates, you may want to email the administrator about it. The template might look like this: "A service request ${ID} has been escalated". The tag "${ID}" marks the number of the service request. Whenever such an email is sent, the appropriate service request number will automatically replace the tag. Choose a notification from the dropdown menu, and edit the text in the text box below it, using the available tags. You may edit the titles of your notifications, too.

The following **tags** build automated messages and are located in **Customized Notifications**, (**Preferences → Customize**) and in the **Escalation Rule** page

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(**Preferences → Service Desk Settings → Escalation Rule →** Click a row entry) in SysAid. You can set a special notification that will be sent according to an escalation rule you have determined.

Table 4: Tags used in SysAid

Tag	Tag Description
${ActionNotification}	Message to administrator, sensitive to action taken. For example, "You have been assigned to Service Request #100"
${StatusNotification}	Message to submitter, sensitive to status/"assign to" change. For example: "Service Request #100 has been closed."
${Title}	The title of the service request
${ModifyUser}	The user who modified the service request
${Account}	The account the service request exists in
${Computer}	The computer the service request applies to
${Category}	The category of the service request
${SubCategory}	The subcategory of the service request
${ThirdLevelCategory} -	The third-level-category of the service request
${AssignedTo}	The administrator the service request is assigned to
${AssignedGroup}	The administrator group that is assigned to the service request
${CloseTime}	The time the service request was closed
${Description}	The description of the Service Request

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Tag	Tag Description
${DueDate}	The date the service request is due
${LinkToSR} -	A link to the service request - possible for administrators only
${Company}	The company name that is associated with the request user
${Phone}	The request user's telephone number
${Cellphone}	The request user's cellular phone number
${SMS}	The request user's SMS number
${CompanyAddress}	The email address of the request user's company
${ID}	The ID number of the service request
${SubmitTime}	The time the service request was submitted
${Notes}	The notes written in a service request
${Priority}	The priority of the service request
${Urgency}	The urgency of the service request
${Status}	The status of the service request
${RequestUser}	The user who requested the service request
${Resolution}	The resolution of a service request
${Solution}	The solution of a service request
${SubmitUser}	The user who submitted the service request
${ModifyTime}	The time the service request was modified
${Location}	The location the service request applies to
${ParentID}	The ID of the parent service request
${CompanyPhone}	The telephone number of the company of the end user

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Tag	Tag Description
${sr.custText1}	This is a customized text of the service request.
${sr.custText2}	This is a customized text of the service request.
${sr.custInt1}	This is a customized integer of the service request.
${sr.custInt2}	This is a customized integer of the service request.
${sr.custList1}	This is a customized list of the service request.
${sr.custList2}	This is a customized list of the service request.
${LinkToAttachments}	This tag creates a link to download the files attached to the service request
$Total_Active_Requests	Adds the current number of active service requests.
$Active_requests_for_assigned_admin	Adds the number of the active service requests of the assigned administrator to the notification
$Timestamp ¤	This tag contains the date and time of the monitoring event.
$EventTime	This tag uses the default server time zone.
${CompanyAddress2}	Another email address of the request user's company
${CustDate1}	A date field that you can customize according to your preferences.
${CustDate2}	A date field that you can customize according to your preferences.
Boolean variables for using in customized notifications*	
$IsNewSr	Returns True if this is a new service request
$isClosedSR	Returns True if this is a closed service request
$isAfterHours	Returns True if the notification is sent outside of the operating hours
$AssignedTo.FirstName¤	The first name of the administrator to whom the request is assigned

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Tag	Tag Description
$AssignedTo.LastName¤	The last name of the administrator to whom the request is assigned
$ActivitiesTable	Available for service requests notifications. Contains the service request activities
$ActivitiesNum	Presents the number of the service request activity.
$ActivitiesTotalMinutes	Presents the total time (in minutes) of all the activities of the service request.

*Boolean variables can be used in cases you want a different message to be sent in specific cases. For instance, if a service request is sent when the helpdesk is closed you can use the tag $isAfterHours in the following way:

#if(${AfterHours} && ${AfterHours}==true && ${IsNewSr}==true)

The Helpdesk is not active at the moment, your service request will be addressed during working hours.

#end

The texts in **Customized Notifications** can (and should) be enhanced with tags.

Quicklists

SysAid allows you to create templates for service requests. These templates can save time for both your administrators and your end users. The quicklists present common issues for service requests in a dropdown menu. Once the end user or the administrator chooses the SR subject from the quicklist, SysAid will

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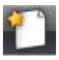
populate all the other fields in the request according to the settings you have determined.

Here is a useful tip: gathering together the most common re-occurring issues in your IT environment, and making them available as quicklists, can bring you closer to a smoother implementation of SysAid End User portal. Your end users will not need to search through the categories and type the title and description for their service requests. In addition, your administrators will avoid reading through long and various descriptions of users want to report a simple and recurring problem, for instance, that there is a paper jam in their printer.

To enable the quicklist option for your end users, check the appropriate box in the **Preferences→ End User Settings** page.

To edit the quicklist according to your preferences, go to: **Preferences→ Service desk Settings→ Quicklist** tab. Click to modify or delete you quicklists, or click the **New** icon  to create a new quicklist.

When creating or modifying a quicklist you can determine the different settings that will be automatically determined for the SR once the topic of the list is chosen: category, title, status, urgency, priority, to whom the SR will be assigned, what attachments will be added to the SR, and other custom fields you can add according to your needs. Note that quicklist subjects appear in the dropdown menu grouped according to their class. Here you can determine which class your quicklist will belong to.

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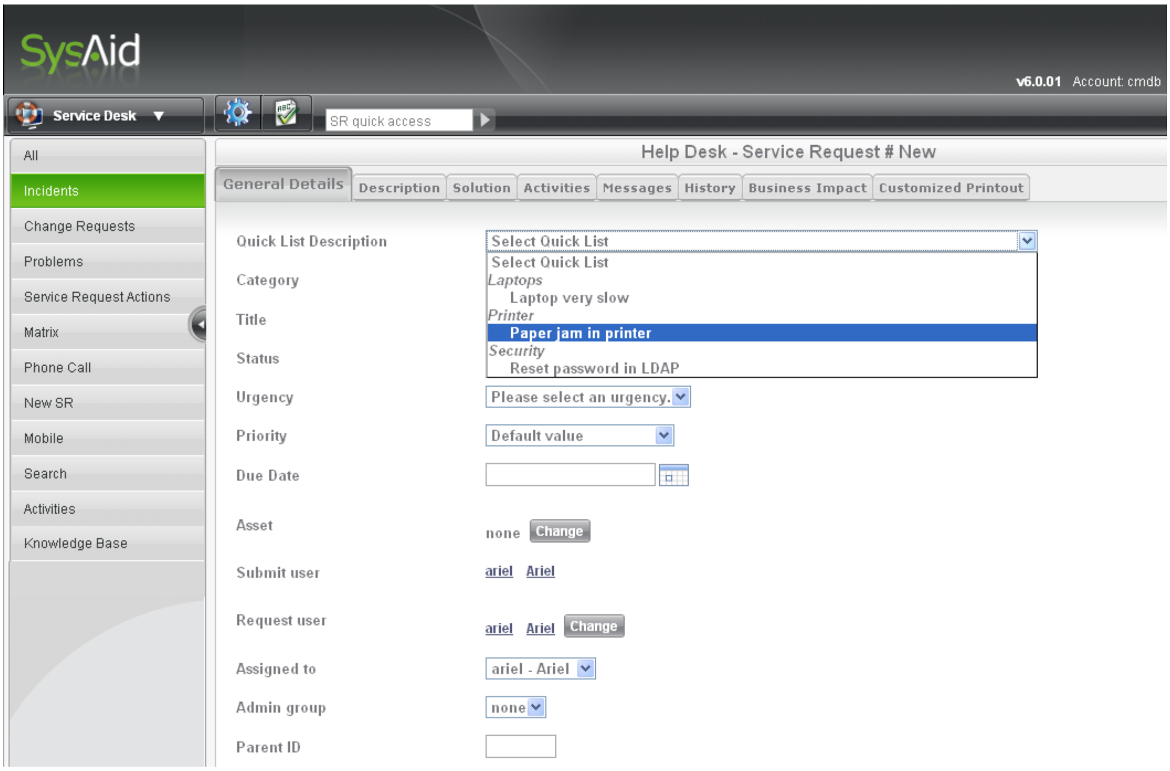
62 Quicklist topics are organized according to classes



For example you can create a template for a service request for re-setting a password. This quicklist template would be relevant for the administrators. The SR template may include a title such as ‘A need to reset a password’, a category and sub-categories, such as ‘Servers’ and ‘Permissions’, and a description, that contains instructions for the administrators on how to reset the password.

An example for a quicklist template for end users can be, for example, ‘Cannot access a webpage because of Firewall block’. The category in this case would be ‘Internet’ and a sub category could be ‘Firewall’. You can specify in the description field how the firewall block on certain websites can be removed.

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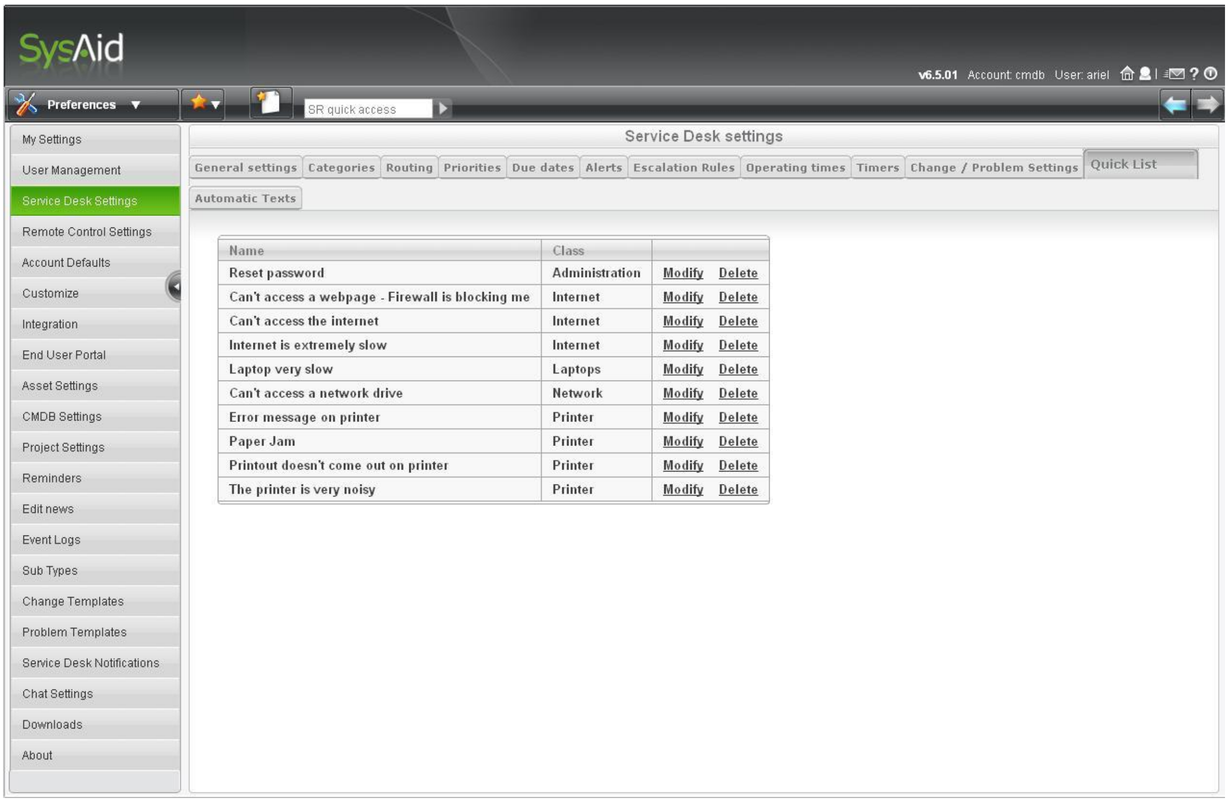
63 Quicklist setting- general details



7.2 Automatic Texts

SysAid enables composing a list of generic texts that can be easily added to the messages administrators compose. Under **Preferences→ Service Desk Settings→ Automatic Texts** tab, you can create and modify such texts, that will save you time while composing the messages to end users. Such texts can be an apology for a delay in service, holiday greetings, or any other text you can use in many of your sent messages. You may build separate texts for your admin groups and each user will see the relevant automatic text of his group.

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7.2 Backup your SysAid Database

You do not have to use external database to enjoy backup capabilities. SysAid supports backup in its internal databases.

To create a backup to your database:

1. Go to: **Preferences → Integration → Backup** tab
2. Check the box to enable the backup.
3. If you are about to perform an action which could cause a database corruption, you can create a backup at once by clicking the **Run Now** button.
4. To configure a backup of the database on a regular basis enter a time for the regular backup, the directory for your backup, and administrators who will receive email notifications when the backup was successful and when it has failed.
5. Save your data backup preferences. The backup is always for the most recent seven days.
6. Note that this SysAid internal backup feature is only available with the built-in databases Derby.

When using Derby database, SysAid sends an email notification of failure or success of the backups, either to the administrator you have selected, or by default to the main administrator. Click the buttons with three dots on to choose the administrators you wish to send the failure/success notifications to. You can also opt not to receive any notification regarding backups, by un-checking the box: 'Send backup email notification'.

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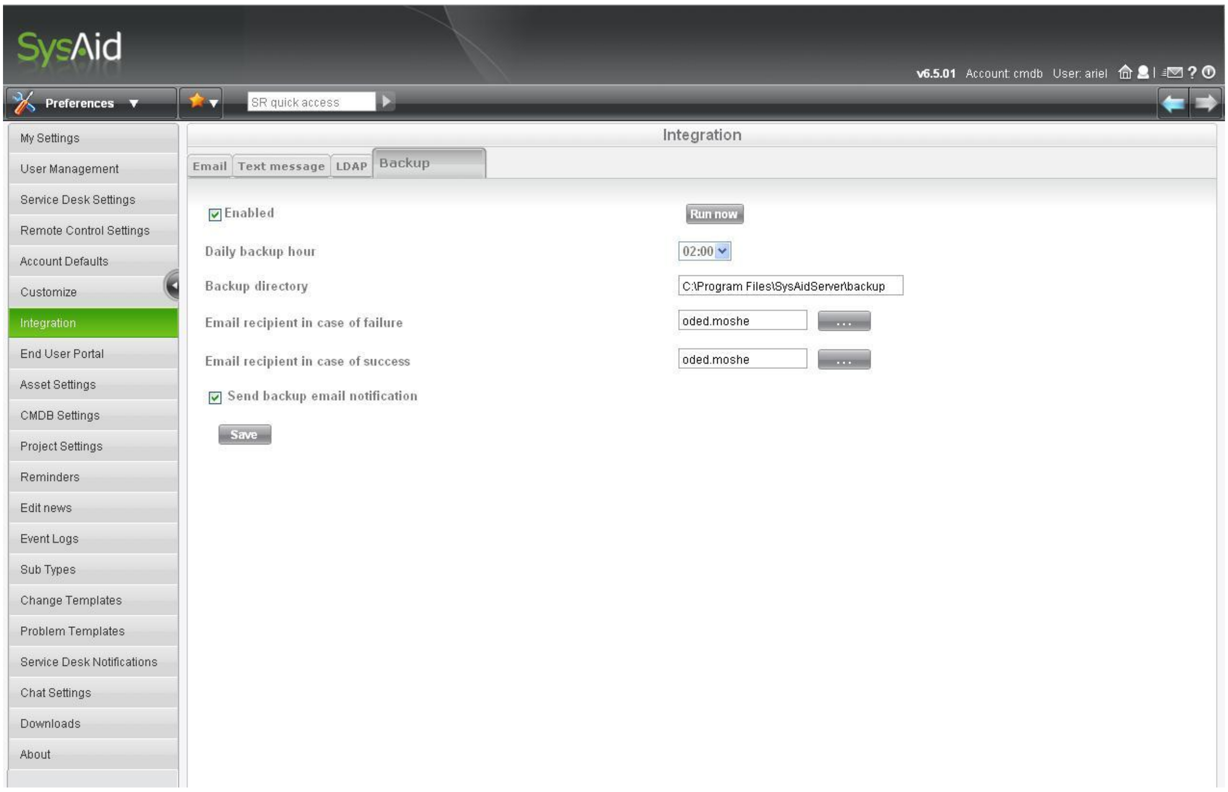
64 Database Backup



Reminders

Under Preferences→ **Reminders** SysAid includes an option to set reminder notifications on several date fields in SysAid including : Assets, Catalog items, Software products, suppliers, CI-s and projects and tasks. For example you can set a reminder email thirty days prior to a software expiration date or an asset warranty expiration date. You can also set a notification when you have exceeded the number of licenses you have.

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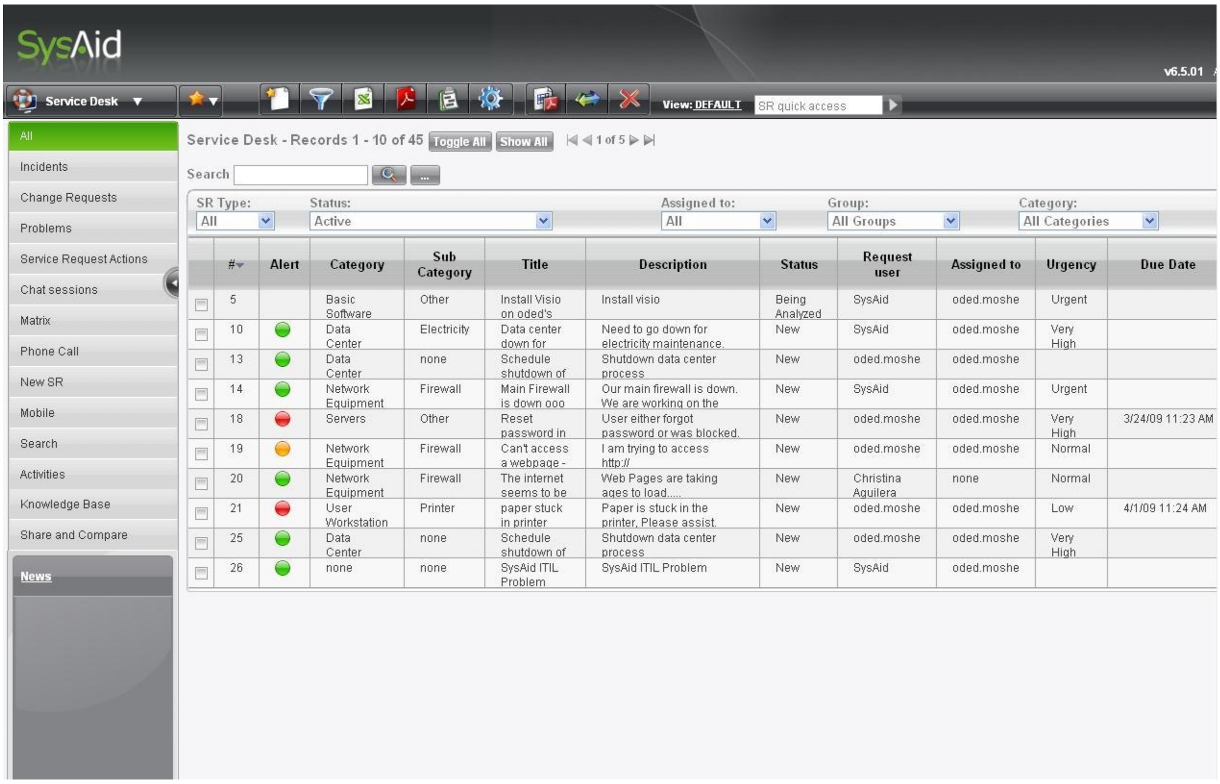
7.3 Administrator Mini User Guide

In chapter 4, we reviewed the basics of the Help Desk; here is a brief overview of other features available for administrators.

Using Lists

Accumulating service requests are stored within lists. Upon entering SysAid go to **Help Desk**, in the **Status** dropdown menu, click on **Open**. Now all **open** service requests will be listed. SysAid lists are a useful feature, enabling the easy filtering, sorting, and viewing of information. They appear throughout the software (Service Request List, Asset List, Activities List Project List and Task List).

65 A SysAid List



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Controlling Lists

You can sort a list by clicking the title of a column. The list will be sorted according to that column. To change the order of the sorting, click the column title again.

You can perform actions on list items. Check the items relevant for you, and then choose an action from the top menu bar buttons. You can toggle between selected items using the "Toggle All" button, at the top right corner.

View all the items by using the "next" and "previous" buttons or by choosing "Show All", which will display all the items in a single page.

Replying to Service Requests

Click on the row entry of the service request from the list; this will open the service request. To reply to an end user, click on Send Message, at the bottom of the page. A popup box will open; enter your text in the email box and then click the **Send** button. This reply and any other responses will be registered and can be viewed fully in the **General Details** page of that service request.

Send Message Option

At the bottom of the page you will see a **Send Message** link. Click on **Send Message** to email, SMS or send an instant message to a user. A popup box opens, in the **Method** field a dropdown menu can be accessed to select the type of message you want to send.

All outgoing and incoming emails regarding a specific service request can be found under the messages tab. In order to see them, you need to make sure you have sent emails from within the service request. Then, all the outgoing emails you have sent to end users, and all their replies to you, will be listed here.

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Icons

In the **Service Request/Asset/Project/Task/Activities List** pages, five icons are positioned in the upper left hand side above the Status bar.

Icon	Icon Name	Description
	New	Adds a new item to the list.
	Filter	Open the filter builder popup screen.
	Export to CSV	Data can be transferred into the Excel spreadsheet.
	Print	Turns the text into a PDF file, with options to print.
	Customize	Add or delete fields that appear in lists and forms

New

Click this icon to add a new item to the list. For example, when viewing a list of service requests, clicking this icon lets you add a new service request. Similarly, when viewing a list of assets, clicking the icon lets you add an asset.

Filter

The second icon is the filter icon. Clicking the icon takes you to SysAid Filter Builder. With the Filter Builder you can create a filter to return only the results you need. For your filter, choose between creating a simple “statement”, an “and” expression, or an “or” expression. A simple statement includes an element (such as “Priority”), an operator (such as “equals”), and a value (such as “Urgent”). The above example would allow only results with an urgent priority. You have the option to choose "is empty" for many of the fields. For instance, you can filter according to an empty Due Date field, or an empty Assigned To field.

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You can also create and/or expressions, connecting simple statements using Boolean logic. If statements are connected by an "and", both must be true for the result to be returned. If an "or" connects them, one or both must be true. While creating an expression, clicking on **Add New Line** adds another simple statement.

Export to CSV

This icon appears where data is summarized in list format. By clicking on this icon SysAid transfers the list data into the Excel spreadsheet.

Print (PDF Creator)

The fourth icon, the **Print** icon, turns the fields related to the page you are viewing into PDF and provides you with the option to print.

Customize

By using the **Customize** icon, you can add or delete fields in the list or the form on the screen you are currently viewing. The option to add filter menus is also offered via this icon.

Note that you can update the following fields at once in the helpdesk list: Status, Priority , Urgency , Custom lists1 Cust List 2 , Assigned to.

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Customizing Lists

A **View** in SysAid loads field items you have selected to appear on the screen. The view has a name and is easily selected from the **View** dropdown menu located at the top of the page (to the right of the icons).

In SysAid you will encounter views; you can select a particular view in the following interfaces:

- **Service Request List** and the **Activities** page (Help Desk)
- **Asset List**, **Software Products**, **Catalog** and **Supplier List** page (Asset Management)
- **Project List, Task Activities List** (in the **Tasks/Projects** interface).

The **Views** function determines which values, and which of their columns (such as “title” or “priority”), appear in lists. Using different views means listing different values and showing different fields. One view, for example, might show only the title and description of new service requests, whereas another view might show only the category and priority of closed service requests.

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Printing Options

In SysAid you may want to print out a single service request, entire service request listings, the complete history for a number of service requests, or customize your own page.

Using the print icon

Click on the print icon. The page will open the document in PDF format. At this stage the page will not yet be sent to print. The PDF document contains a summary of the service request/s, based upon the details entered in all of the six pages (General Details, Description, Solution, Activities, Messages, History).You can also print unicode characters using the print icon . Note that the PDF document holder contains the vertically placed Attachments and Comments tabs. These tabs are automatic additions from Acrobat and are not functional for documents exported from SysAid.

To print the PDF summary click the print icon on the toolbar inside the PDF interface screen. Alternatively you can save the file.

Customized Printout

The **Customize Printout** icon. This icon allows you to merge the data in the service request to your customized printout, from within the service request. More details about this option can be found under section **4.1** in this guide

If you would like to print only selected items from a service request, for example only four fields, you can customize this by creating a new page, by clicking on the **Customize Printout** icon.

The **Design Form** screen will open. Choose the fields to appear on the printout from the **Available Fields** box, and by using the arrow button move them to the

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Visible Fields box. For the **Page** field choose from the dropdown menu, **New.** In the page caption type a new name for this page, for example "**Printout**". Click **Save**; SysAid will now add a new page tab called **Printout** and this will be located next to the **History** tab. Click on the **Printout** tab, to proceed to print the contents of the page. Click the Print icon to print the page.

Export to Microsoft Excel and Print

If you have hundreds of service requests, you may want to print a large quantity of rows of service requests. In this case you can export the data to Excel. From Microsoft Excel you can then select to print one of these rows or a selection of rows and columns. To do this, go to the page you want to export to Excel (**Help Desk List or Tasks/Projects List**). Click on the Excel icon, a popup screen will open, and you will be asked if you want to open or save the file. Make a choice. Click **Open;** data will be immediately transmitted to an Excel table. Click **Save**; you will be prompted where to Save it. Then a popup box will give you the option to open the file. You can now highlight the relevant rows and print them, while de-selecting those columns you do not need.

Additional icons available from within the service request

The **Duplicate Service Request** icon allows you to create a new service request identical to the one you are viewing. To learn more about this option, go to **Duplicating a Service Request** under section **4.1** in this guide.

The **Create new linked Change/Problem** icon allows you to link the current service request to a new change process or a new problem process. Learn more about this option in the **ITIL Package Guide** that can be found in the SysAid Website, on page http://ilient.com/contact_support.htm

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To check the spelling in your service request, click the **Check Spelling** icon

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Chapter 8 Managing Help Desk – Advanced Settings

In this chapter we will proceed to set up some advanced configurations in the help desk. You first need to configure the help desk for your local environment; this is done by customizing the status, urgency and priority menus, if necessary, and setting up routing rules. Once you have made these configurations you can then get SysAid to send e-mail or SMS notifications to an administrator, an option described in the second part of this chapter.

8.1 Service Desk Settings

Service request are queued according to categories, priority and urgency.

- Statuses
- Urgency
- Priority Rules
- Alerts
- Due Dates
- Escalation Rules
- Operating Times

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Statuses

A service request has a life cycle. Upon entering help desk the service request is assigned a **New** status. Depending upon your local in-house policy you should define the point when a request becomes **Open**, maybe at dispatch upon entering the help desk or only when the assigned administrator reads the service request. This change in status is important, as later on you can take advantage of monitoring response times from the opening of a service request until it is closed (Operating Times). Another useful result is the ability to receive color alerts signaling when a request fulfills certain conditions (Alerts).
You can determine that certain fields in the service request will be obligatory, and that the administrator will have to fill them when the Service request is in certain statuses. For instance, it may be logical to define that in order to move a SR to the status “closed”, the solution field should be filled out by the administrator.

You should prepare your own in-house coding scheme for Statuses that will describe the transient stages a service request goes through from entering help desk (New) until it is closed. For example statuses can change from **New** → **Open** to help you manage your incoming service requests.

Set up customized status menus

See **section 7.1.2 Adding your own customized list**, for further instructions.

Urgency

1. The end user sets the urgency within the end user portal/interface when completing the service request form. The default menu settings (Low, Normal, High, Very High, Urgent) can be changed, or the menu can be extended by the administrator. SysAid converts the urgency level to a priority number, so you should ensure that the same numerical coding system is used and the same increments are used. You should retain the

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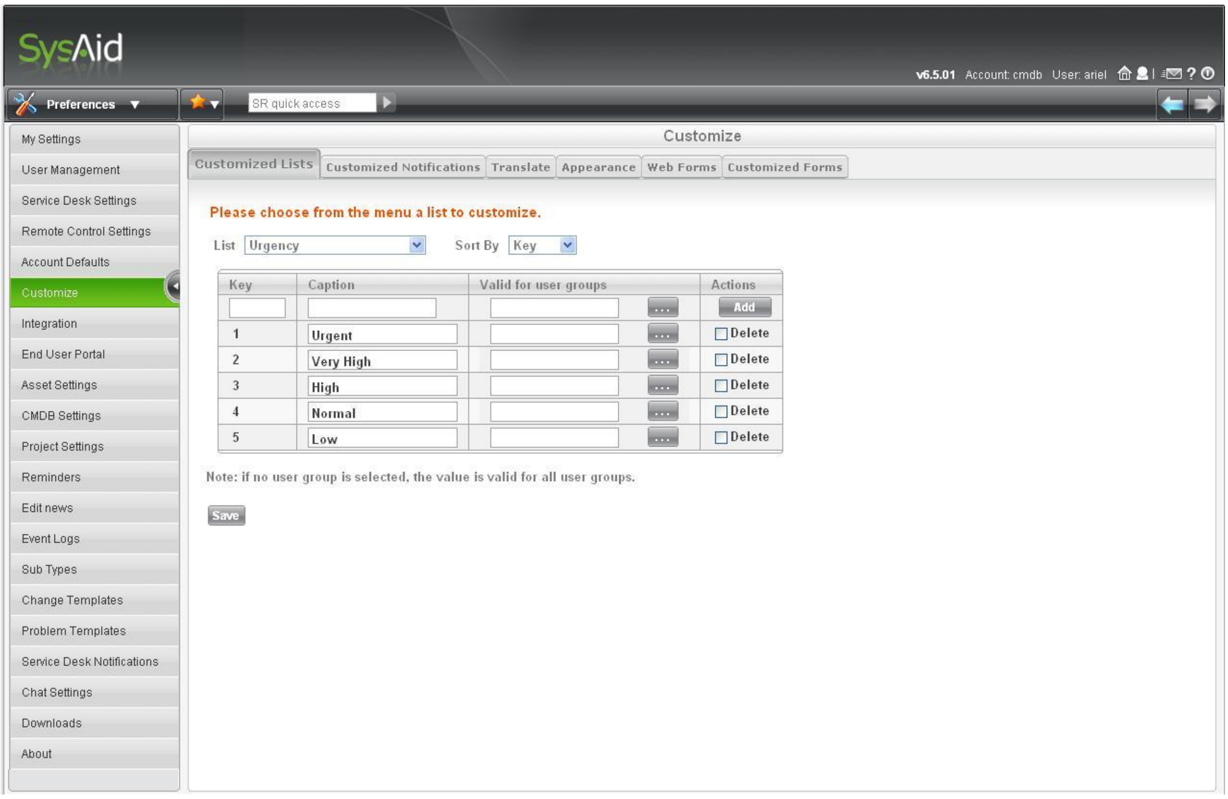
1-5 coding system. **Please note - 1 is the highest number, with the highest level of alert and 5 the lowest number.** (See Chapter 7 Advanced Configurations for all modules).

66 Setting up the urgency menu



Priority Rules

A service request has a priority. The priority is set automatically when the help desk receives the service request. A priority indicates the level of attention or precedence rating given to a service request. Priorities are **set by the administrator**. There are two ways to set up priorities in help desk.

1. You can assign one priority level to all incoming service requests irrespective of the asset they relate to.

2. Alternatively you can create priority rules that relate to assets, asset groups, department, user or company. For example service requests

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relating to assets of senior management may be given higher priority than an asset of a junior member of staff, or requests from the communication department in a certain organization can automatically receive a higher priority than the archiving department.

Both options described above operate on a coded priority menu and this is the first thing you should set-up.

1. You can set up a coded priority menu by going to **Preferences → Customize → Customized List.**
2. Select from the **List** drop-down menu Priority. Here you will see the default coding from 1-5. **Please note - 1 is the highest number, with the highest level of alert and 5 the lowest number.**
3. Now add your own coding.
4. In the **Key** box, you should use a numeric figure. You should use the same coding system for the **Urgency** menu. If you change the coding, you should be aware that SysAid converts the urgency level to a priority level; therefore it is important to ensure that you use the same increments and coding system to aid this conversion. Finally do not punctuate numbers with commas (,) or full stops (.)
5. Add the text description in the caption box. Click **Add** to save this line entry.
6. Once you have added all entries to the menu, click **Save.**

Your priority menu is now set-up.

Option 1: Create a default priority

This default setting instructs SysAid on the priority setting to be given to all new service requests.

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1. Go to **Preferences → Service Desk Settings → General Settings**.
2. On the **General Settings** page you will see the following default setting, which is active. This default setting gives all new service requests the priority of **Normal**, when sent via the End User Portal or via e-mail. Even if a service request has an urgency of Very High or Low, the priority will automatically be set by SysAid to Normal.

3. You can change the default priority setting by clicking on the dropdown menu. You set up your coding menu earlier. You will notice that within the dropdown box you have the option to set a priority to the urgency. The urgency is chosen by the person who submitted the service request. To make the priority level sensitive to the urgency level set by the end user, click on the dropdown menu and select = Urgency.

Exclusions: Even though the default priority is active and takes effect on all new service requests, there are three instances when the default priority will not take effect:

4.1 When an administrator creates and sends a new service request from the administrator interface.

4.2 When the end user portal has been modified and the priority field is made available for end users to submit new service requests via the Submit Service Request Form.

4.3 When a priority rule has been set up (see below), all those new service requests that meet the criteria set in the priority rule will not be covered by the default priority setting. Those not covered by the priority rule will be governed by the default priority setting.

Option 2: Create Priority Rules according to asset, asset group, department, company or user.

You can create rules for automatically assigning different priorities for incoming service requests.

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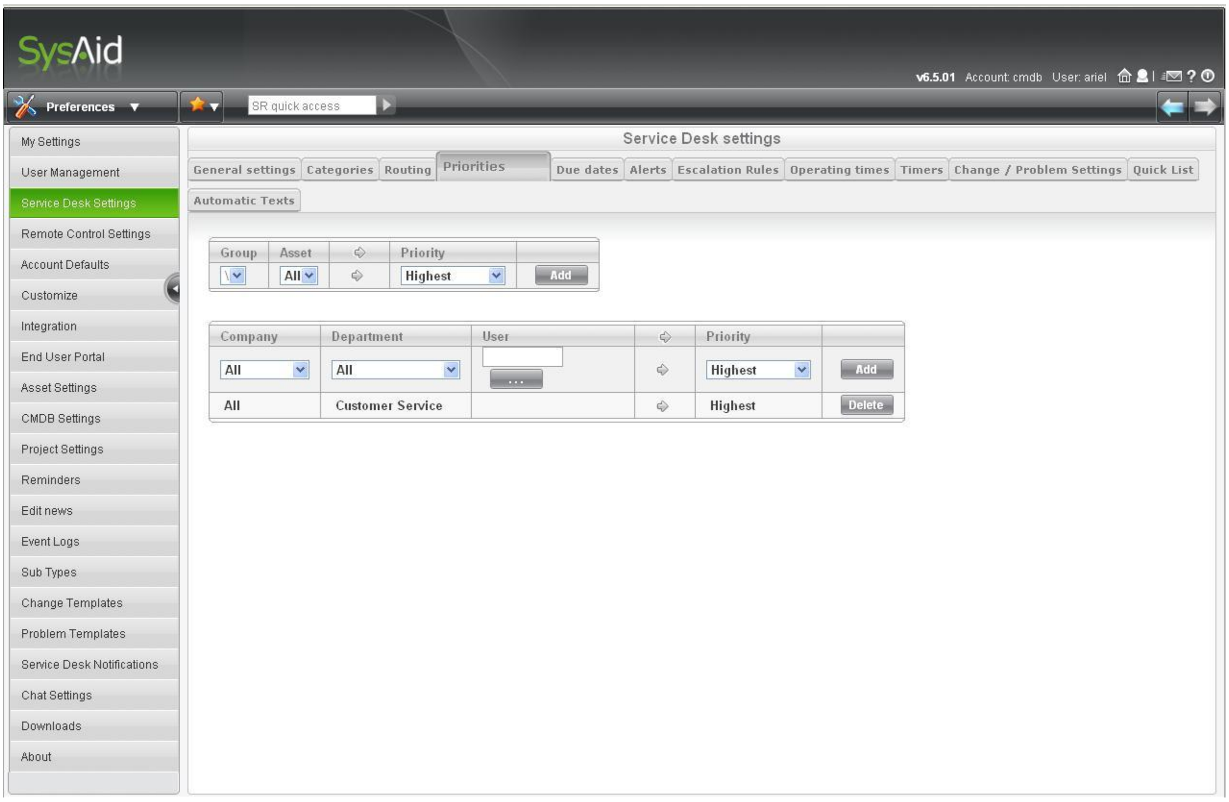
1. Go to **Service Desk Settings → Priorities** tab. This screen lists priority rules. You can select form the dropdown menus an asset, a group of assets, a company, a department, or browse for a particular user. Note that your network information, such as assets, users, companies and departments, should be set beforehand.
2. Next, choose the priority level for service requests according to: asset, a group of assets, company, department or user. Whenever a service request is submitted, if a priority rule exists for the asset, asset group, company, department or user you have specified, the rule will assign a suitable priority to the service request.
3. To delete a priority rule, click **Delete** at the right of the rule.

67 Priorities page



If an element such as asset or company is covered by more than one rule, for example one rule for an asset and another for its group, and perhaps even another rule for a higher-level-group, then the most specific rule is applied.

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End users will have to select their asset/company/department in the dropdown menu in the **Submit Service Request** form, so that the priority rules according to these elements will be applied by SysAid. Finally when the service request arrives in SysAid the administrator can go in and reassign the priority.

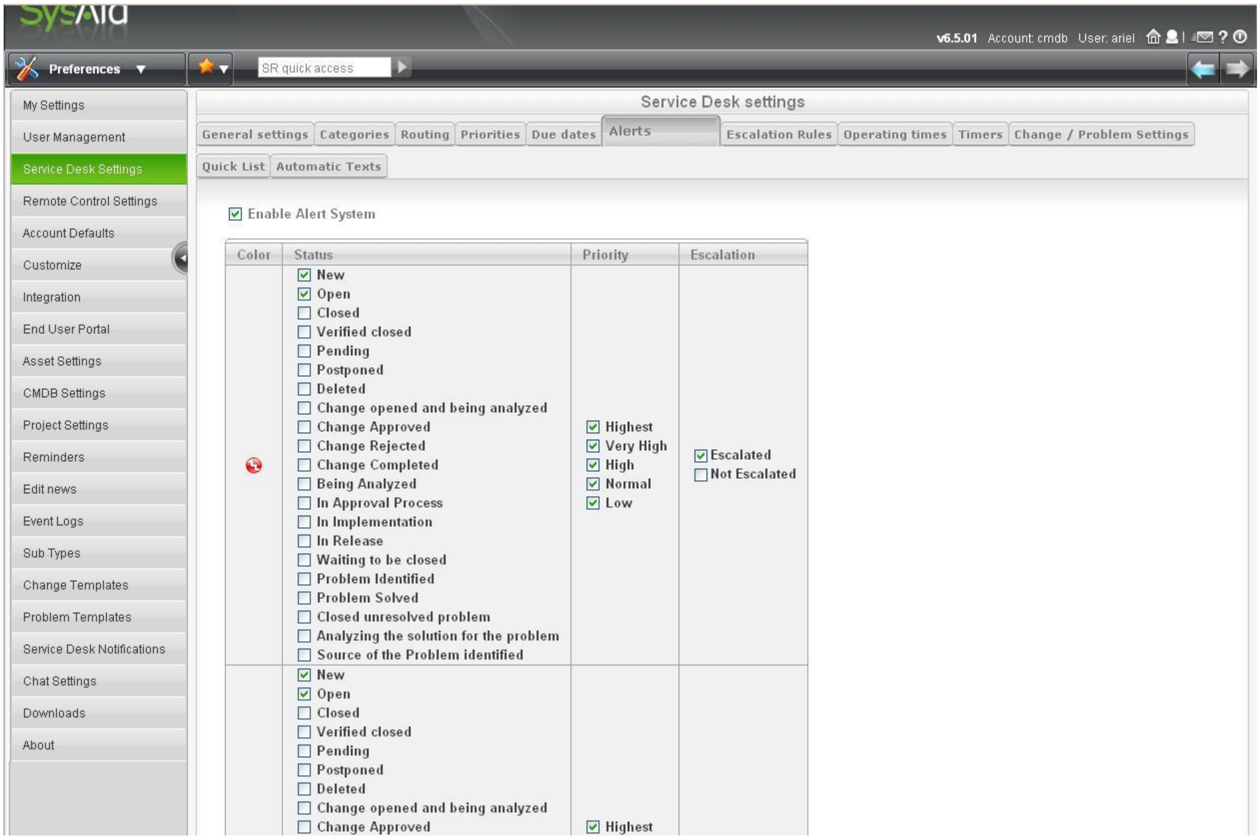
Alerts

SysAid offers an alert system for service requests meeting certain predetermined conditions. By enabling the alert system one of four colors can appear in the service request list signaling that it has fulfilled certain criteria you have selected.

Create an Alert System

1. To set up this optional alert system, go to **Service Desk Settings → Alerts tab**.

68 Alert settings page



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2. Click on the box next to **Enable Alert System**. Here, you can create alerts for your service requests. There are four alert colors: green, yellow, red, and flickering red. For each color, you can select statuses, priorities, and a state of escalation (escalated or not escalated). A service request will activate the alert if it meets all the conditions you select. The request must match at least one of the selected statuses, one of the selected priorities, and one of the states of escalation. If you do not choose a status, priority, or state of escalation, the alert will never go off.
3. Click the Submit button to set the alert system

How do I see the alert lights?

To see the alert lights in the list of service requests click on the  **Customize** icon.

A popup window will open, in the **Available Columns** click on the **Alert** field, then on the arrow so as to move it to **Visible Columns**.

Alert lights are also visible under **My Network Assets**. They appear for assets, or groups of assets, which are associated with a service request and have activated an alert.

Due Dates

You can define the "due date" a service request will automatically receive. The due date will be calculated based on the category, the sub-category, the third-level category, the urgency and the priority of the service request.

Create Due Dates Rules

Service requests have *due dates* – dates by which the service request must be handled.

SysAid can automatically determine a due date for a new service request, based on predefined rules.

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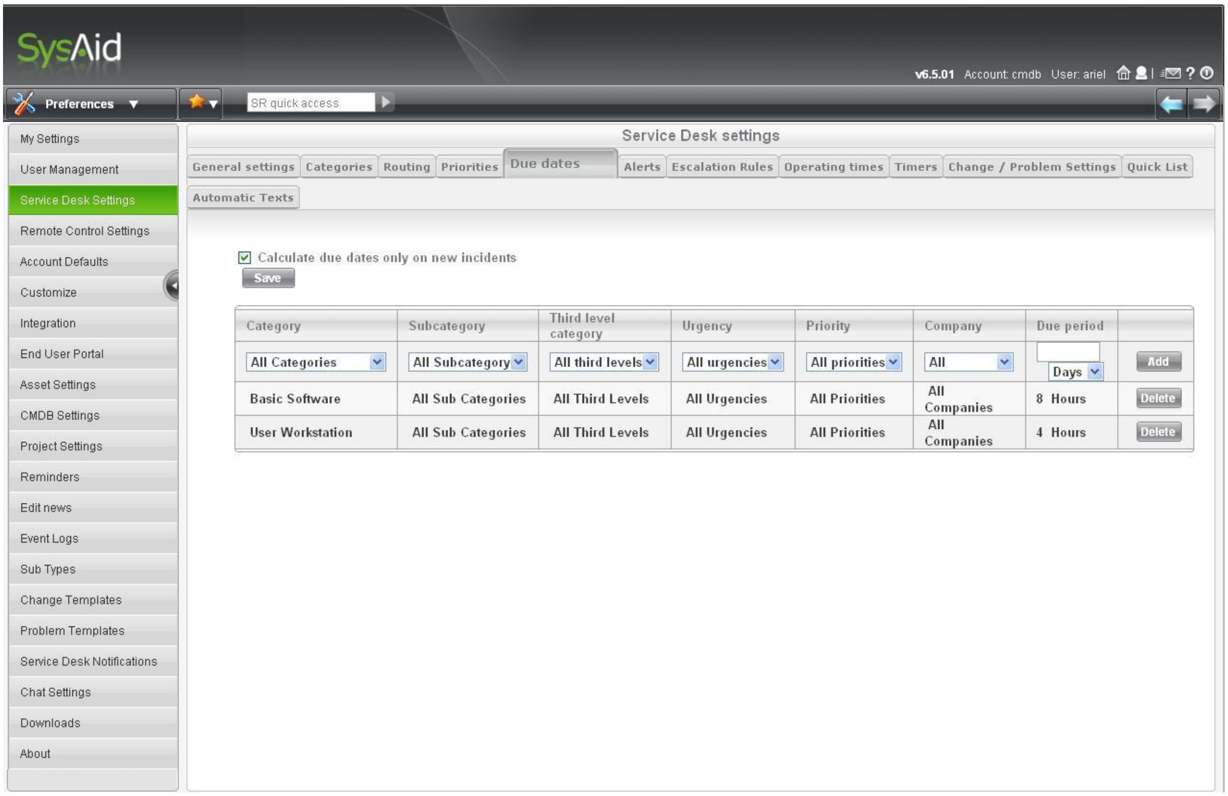
1. To define such rules, go to **Service Desk Settings → Due Dates** tab.
2. On the top of the **Due Dates** page, appears a line for adding a new due date rule. Due dates can be calculated based on the category, sub-category, third level category, urgency, and priority of the service request. Create a new rule by selecting parameters. Finally, choose within how many days or hours service requests matching the parameters must be solved.
3. Click **Add.**
4. To see the **Due Date** field in service request list click on the  **Customize** icon. A popup window will open; in the **Available Columns** click on the **Due Date** field, then on the arrow to move it to **Visible Columns**.

69 Setting up Due Dates



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You can choose whether you wish SysAid to re-calculate the due date when changes occur, by un-ticking the box **Calculate due dates only on new incident** at the top of the due dates page.

Escalation Rules

When a certain condition is met, you might want a service request to *escalate*. Escalation describes the process by which an action is initiated. When a service request escalates, it performs a predefined action. An escalation rule, therefore, contains these two elements:

- A condition
- An action occurs when this condition is fulfilled.

Here is an example: SysAid administrator, Rachel, often forgets to solve service requests. If, within a month, she neglects to solve a service request assigned to her, you would like SysAid to automatically email her the message, “Answer your service request, Rachel!” The condition, therefore, is that a service request be open, a month old, and assigned to Rachel. The action is to email Rachel. This is the escalation rule. Now, whenever Rachel fails to solve a service request on time, the service request will escalate, and SysAid will automatically remind Rachel to address it. This was just one example. Various other conditions and actions are possible.

Note: Before creating an escalation rule, please make sure you know and define for which service requests and under what conditions this escalation rule is to be applied. If you fail to define this, the result might be that every single service request in SysAid will escalate automatically.

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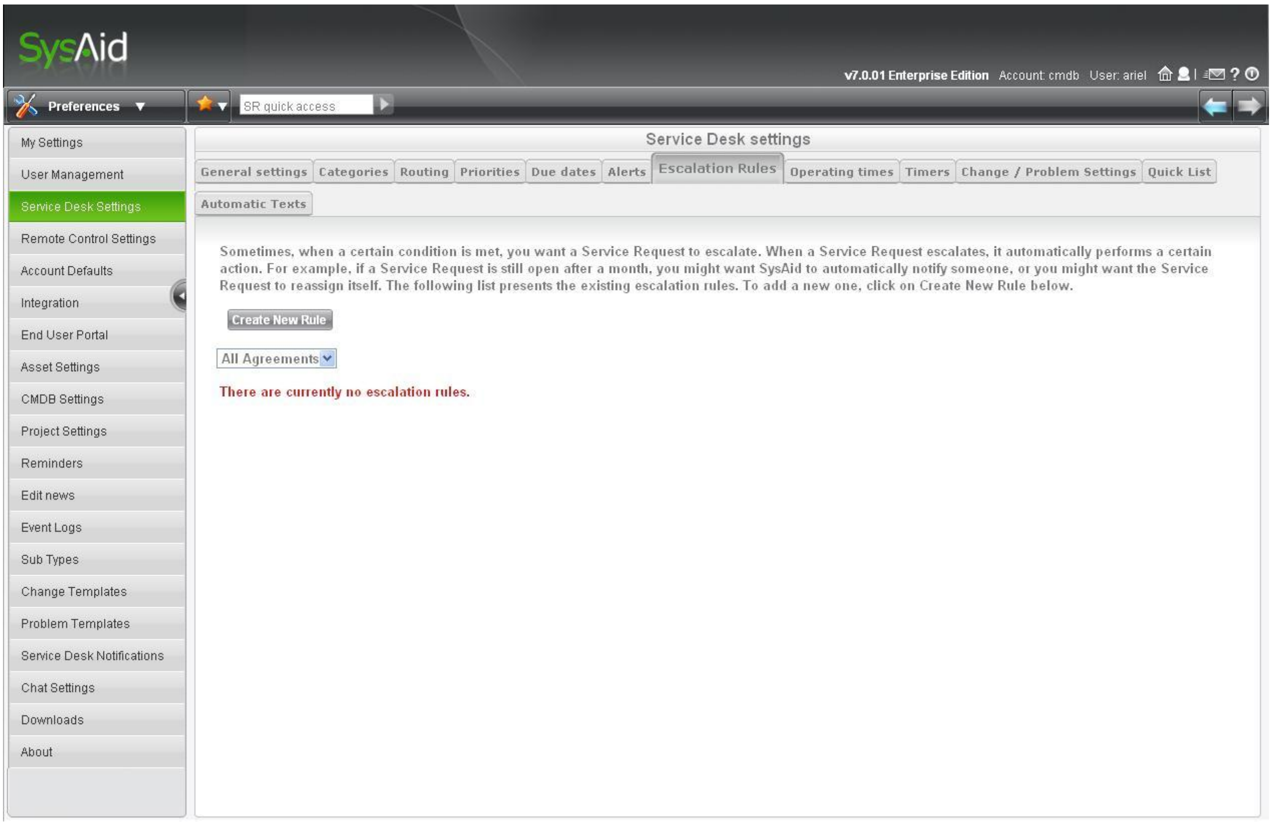
Create Escalation Rules

1. Go to **Service Desk Settings → Escalation Rules** tab. The **Escalation Rules** page lists the existing escalation rules

If you have the SLA and SLM SysAid modules, you will be able to select from a dropdown menu the SLA levels that are defined in your system. In case you have not created any new SLA levels, the options available in the dropdown menu will be: All agreements, and Default SLA.

70 Select the relevant SLA for your escalation rule



2. To add a new escalation rule, click on the **Create New Rule**. This will lead you to a form where you can create a new escalation rule.

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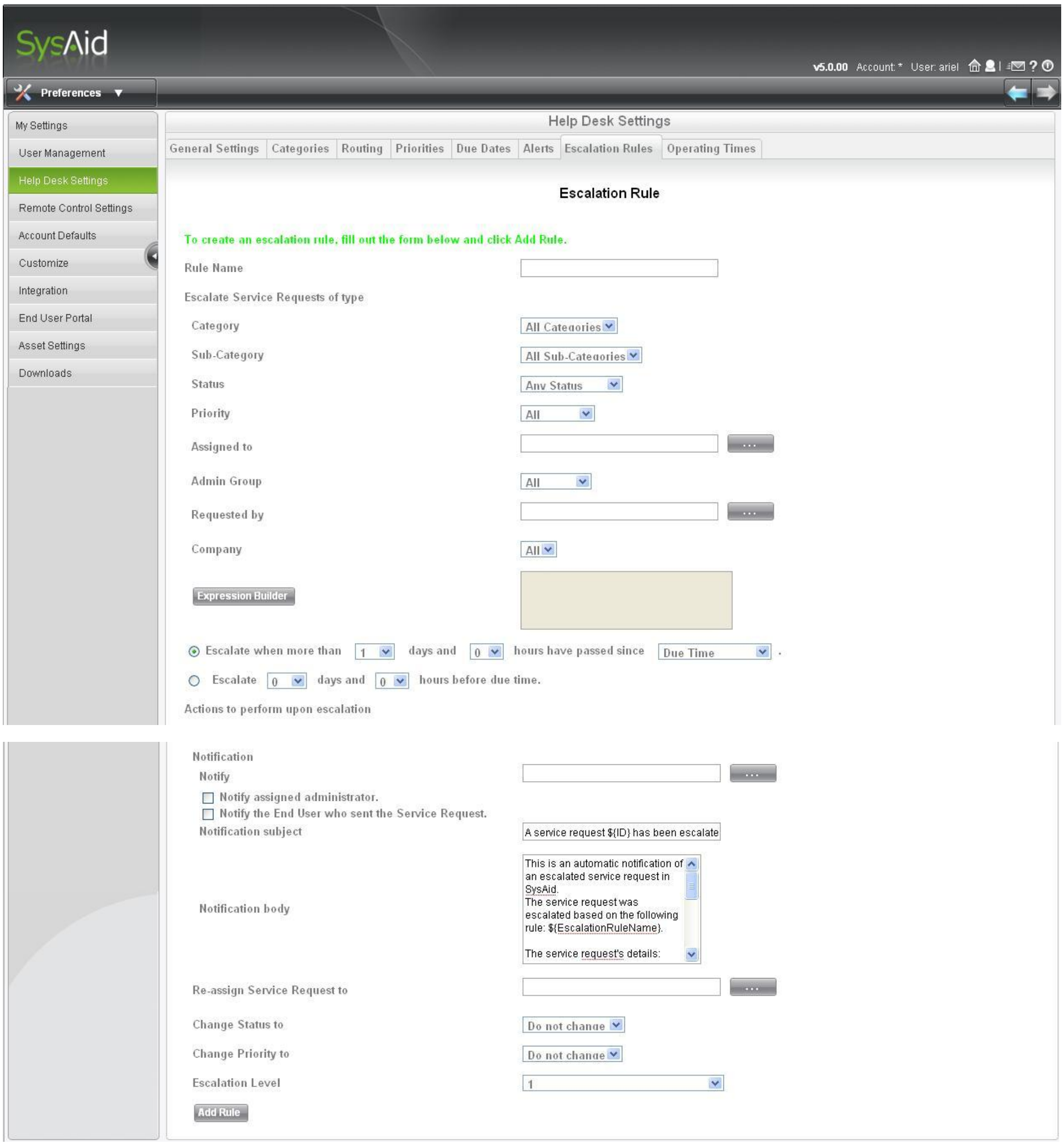
71 Setting up an escalation rule



3. The form will let you compose various conditions and actions. Escalation rules can be based on a certain category, sub-category, third level category, status and priority.
4. In the "Actions to perform upon escalation" section in the escalation rule, you can choose a notification by clicking the three dots button. Note that you need to compose the notifications first. You can compose here messages that will be sent automatically to users when a service request escalates. Fill in the notification subject in the pane, and the notification body in the text box below it. You can use

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tags for the subject and the body of the notification. To learn about tags, consult chapter 7 (7.1.3) of this manual. Use the checkboxes to determine to whom and in what method the notification should be sent.

5. You can determine here whether the escalated service request will be re-assigned, to whom, how its status and priority level will change upon escalation, and what escalation level it will reach. Escalation rules have "escalation priority". You will see an escalation priority dropdown menu. Certain conditions for service requests, for instance, high-urgency requests two weeks past their due date, might merit escalation of a high priority. You can also create low-priority escalation rules for non-critical conditions: for example, service requests that are only a day past their due date. Escalated service requests can be increased in escalation with a different priority.
6. You also have an option to use an Action Builder that allows full customization of escalation rule actions. Choose a statement and an element to create a filter according to which the service request will be escalated. For instance, you can choose that an escalated service request will be escalated to a specific Admin group.

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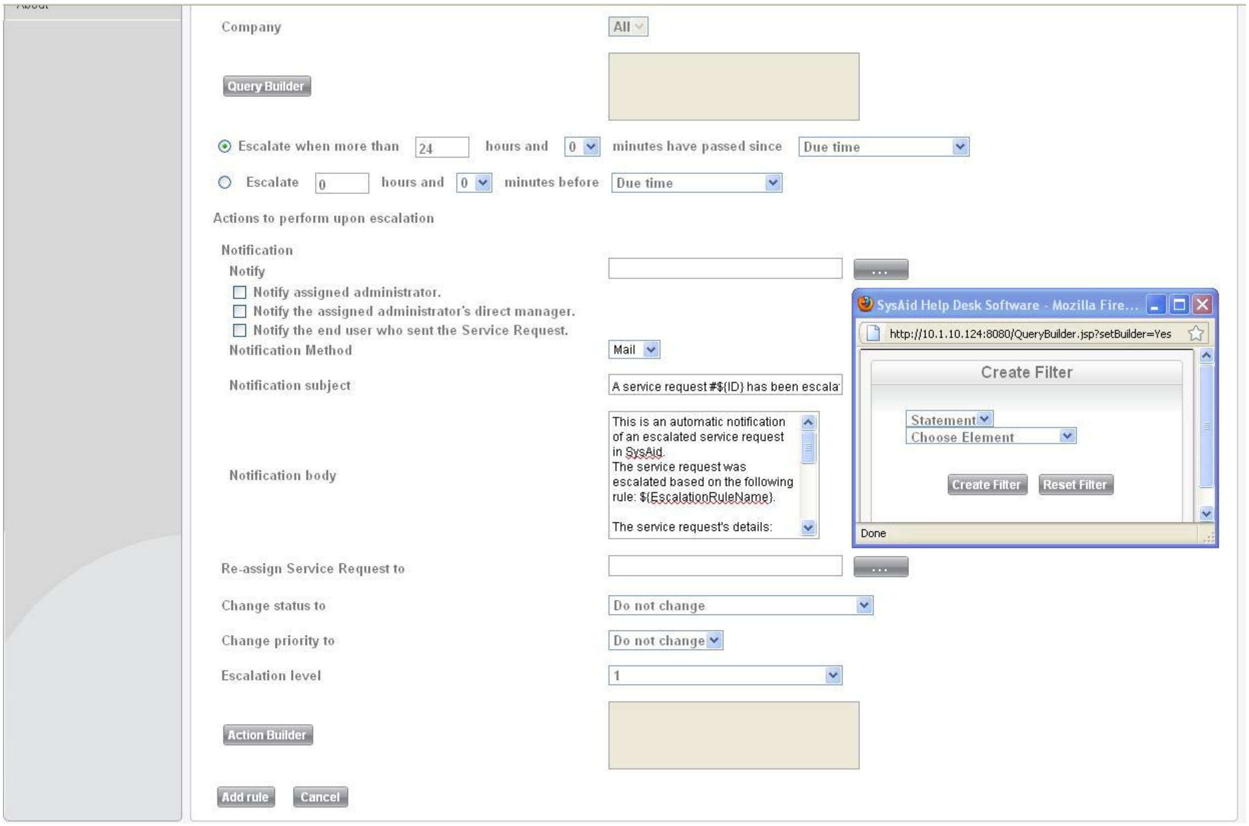
72 Creating Action Builder for an escalation rule



7. You can set an escalation rule by inserting the time in hours and minutes, based on various elements such as: Due time, Last modify time, Follow up planned and actual date, and other options listed in the dropdown menu.
8. Click the **Add Rule** button at the bottom of the page.

Note that SysAid allows to escalate the Service Level Agreement according to timers, and to add timers and other service request dates such as 'close date' and customized dates to the SLA.

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Timers

An advanced feature of SysAid is the concept of *timers*, which can record time for service request operations. For example, a *Time to Respond* timer can record how long it took an administrator to begin handling the service request. The timers can be viewed in the service request list-- you can add them to your list views.

1. To create timers, go to **Preferences → Service Desk Settings → Timers**.
2. When creating a timer, create an expression that defines the conditions for recording time. For example, create the expression "(Status <> Closed And Status <> Verified closed And Status <> Deleted)" to record how long it takes to resolve a service request.
3. Finally click the **Save** button.

SysAid offers a convenient Expression Builder, letting you build expressions based on SysAid fields. Building expressions is an advanced feature. If you require assistance in building an expression, contact us for support.

Operating Times

In the **Operating Times** screen, you can create operating time configurations. An operating time configuration specifies the operating days and hours of the help desk for a particular company or SLA (requires SLM module). Holidays can be specifically excluded. Due dates, escalation, and timers will use these definitions.

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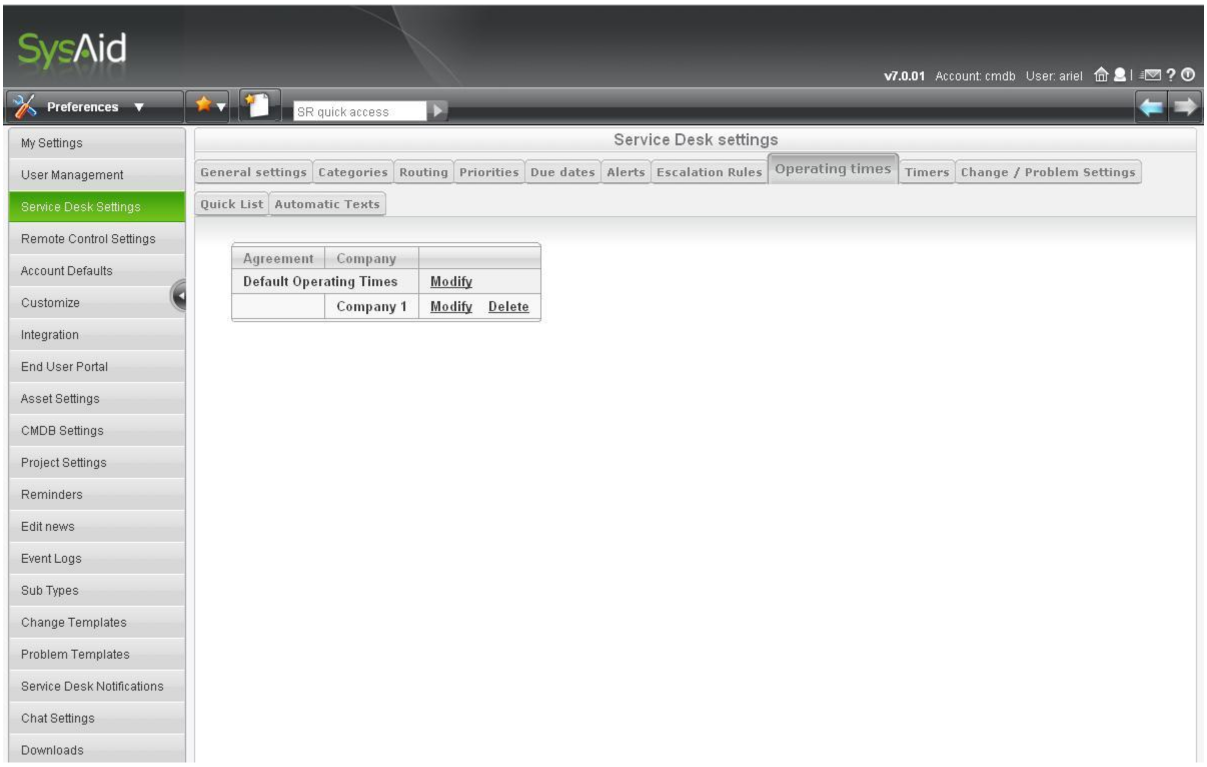
#39 Enterprise only. When you open the Operating Times tab, you will see a list of your different operating time configurations.

To create a new configuration:

1. Click the "New" icon on the icon bar.
2. (SLM only) Select whether to create a new set of operating times for a company or for a particular SLA.
3. Click "Create New."

73 Operating times table according to service agreements



Modifying an operating time configuration

1. To modify an existing configuration, click modify. If you have just created a new configuration, you will be at the modify screen already.
2. Choose the days and hours that your helpdesk operates for the currently selected company or SLA. You are allowed one break in the middle of the day, as denoted by the times before and after the comma. For ease of

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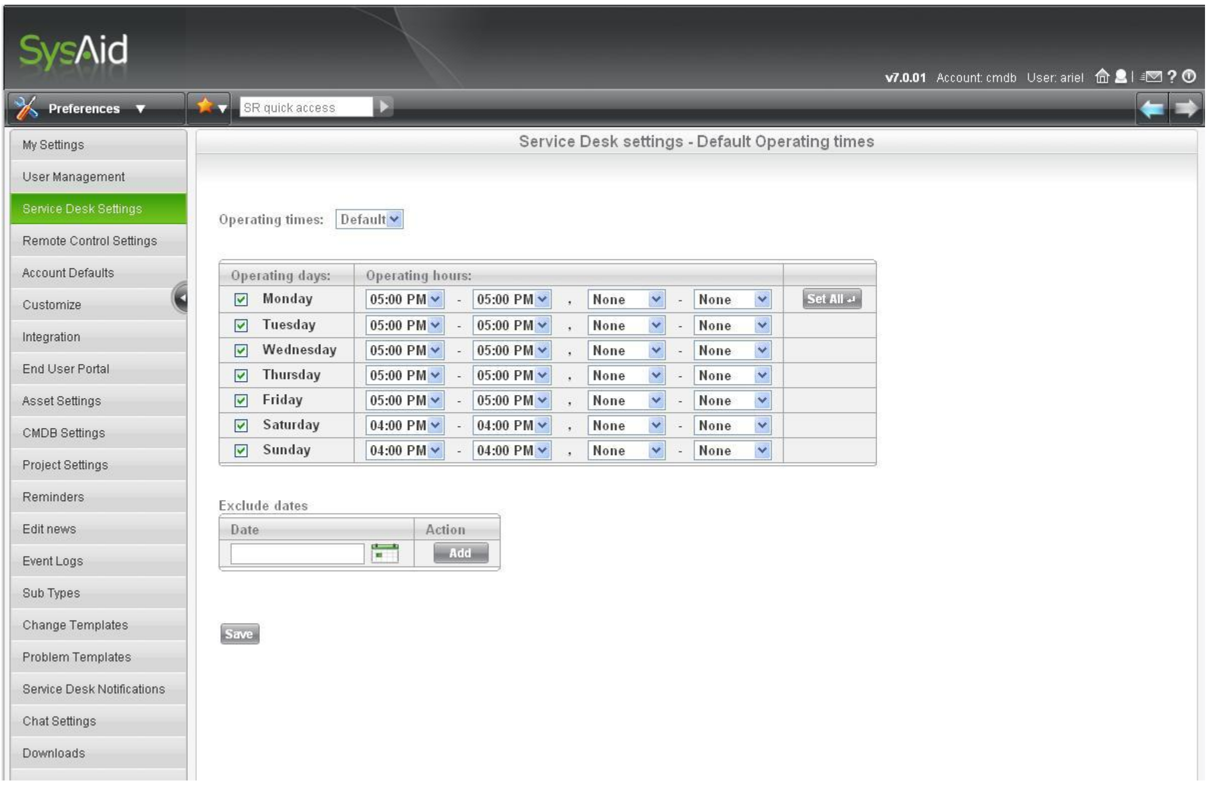
configuration, you can copy your operating times for Monday to all the other days of the week using the "Set All" button.

3. The exclude dates list allows you to input any dates where you do not work your normal operating hours (such as a holiday).
4. Make sure to hit "Save" after making any changes.

74 Setting up Operating Times



8.2 Satisfaction Survey

The survey feature enables you to keep in touch with the needs of your end users. SysAiders can now issue a survey when closing a Service Request, in order to track and measure the satisfaction of your end users by the services of your helpdesk.

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Enabling an end user satisfaction Survey

In the General Settings page, under Preferences →Service desk Settings, you can also choose to add a satisfaction survey that will be sent to your end users once their service requests are answered. To enable this option, click the checkbox:

Once the survey option is enabled, you should edit your survey.

Editing the satisfaction survey

To setup satisfaction survey:

1. Go to Preferences → Service Desk Settings → General Settings tab
2. Check the box: “Add a link to a survey for the end user regarding a closed Service Request”.
3. A URL for the satisfaction survey will be added, in the email notification regarding the closure of a service request.
4. To edit the question, go to: Preferences → Customize → Translate tab.
5. In the **Translate page**, click to download the translate file. Save the file in an easily accessible location on your computer, for instance, on your desktop. To edit the Translate file as a text file, you may use Notepad or a similar program.
6. Open the file to edit it. To look for the survey question that now needs to be edited, press Ctrl + F and enter “survey.question=”.
7. Edit the text for you question, save the file, and upload it via SysAid Translate page.
8. To edit the optional answers, go to: Preferences → Customize → Customized Lists tab
9. From the List drop down menu choose **Survey**.
10. Edit your questions, and click **save**.

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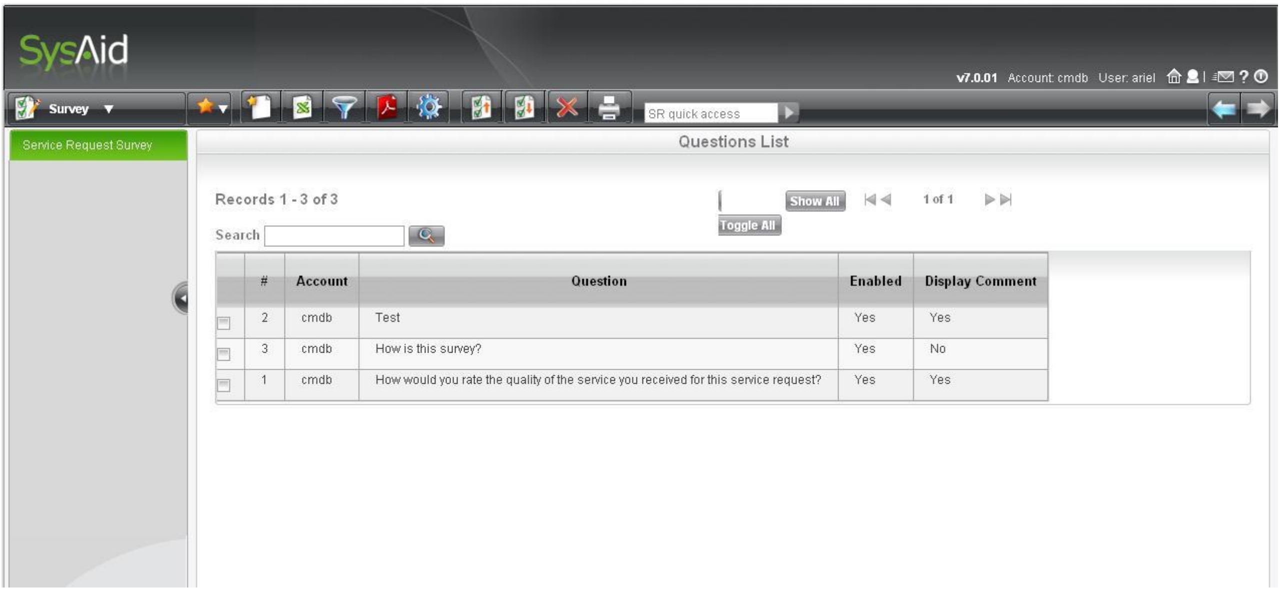
Your survey results can be pulled as a report. There are three available reports regarding the survey system: satisfaction level by administrator, satisfaction level by category and satisfaction level by company.

For Enterprise Edition Only: To edit your Survey questions, go to **Survey** from the main left menu. Here you can see a table with the survey questions, which account they belong to, whether they are enabled, and other preferences regarding your survey questions. You can customize this page according to your needs by clicking the **Customize List** icon . To change the order of the questions in your survey check the box of the question you wish to relocate, and click the **Move Question Up** or the **Move Question Down** icons, at the top bar. To edit the question and its optional answers, click the question row entry. To add a new question to your Survey, click the **New** icon .

75 Survey Questions List



On the **New Question** page, fill in the text of your question in the text box. The text box is marked with a red asterisk, since it is a mandatory field.

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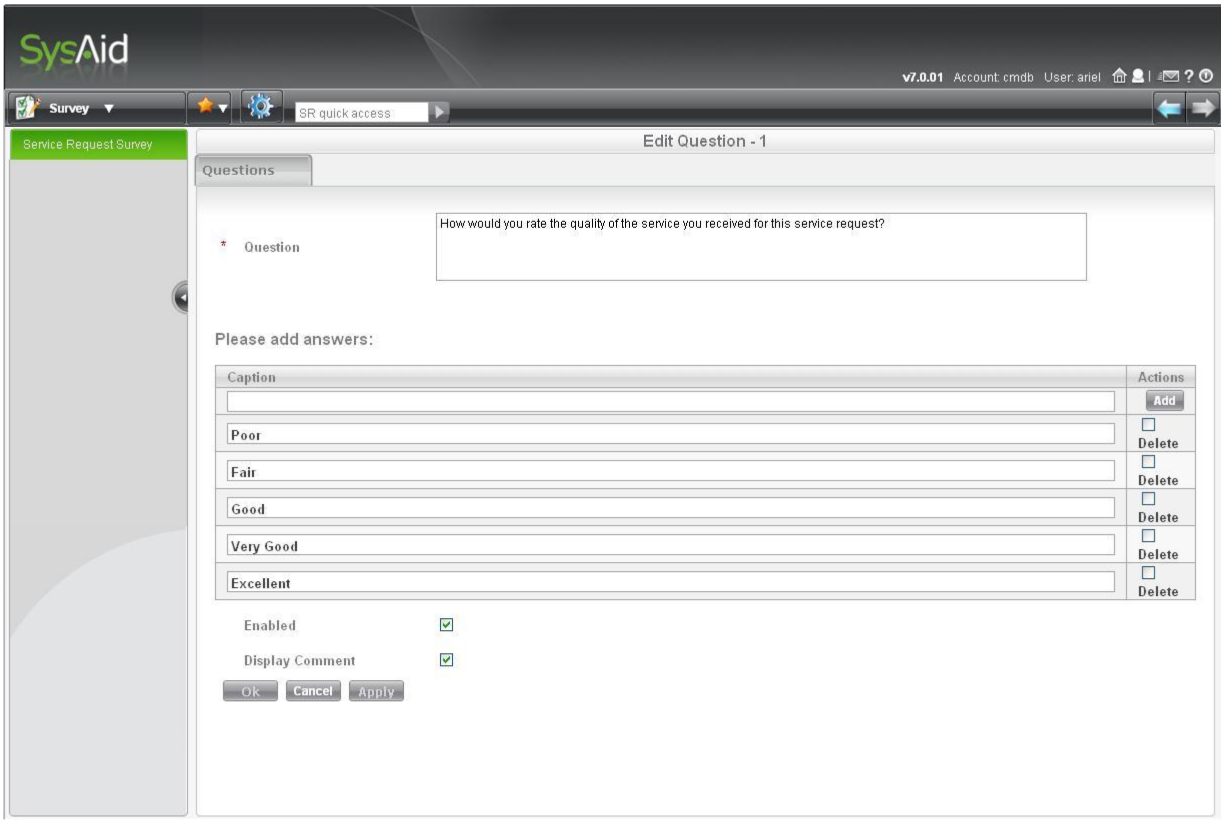
In the caption pane, insert one optional answer, and click the **Add** button. Repeat this process to add more optional answers, or check the **Delete** box to remove the optional answer.

Check the **Display Comment** box to add a text box for the user who fills in the survey to add free text as an answer to the question.

Check the **Enabled** box to allow users to see and answer this question. The option to disable survey questions allows you to select different questions for different surveys. Choose the questions that are relevant for your current survey, and enable them.

Click **OK/ Apply** to add your new question(s) to the survey.

76 Edit a Survey Questions



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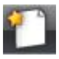
8.3 Editing News

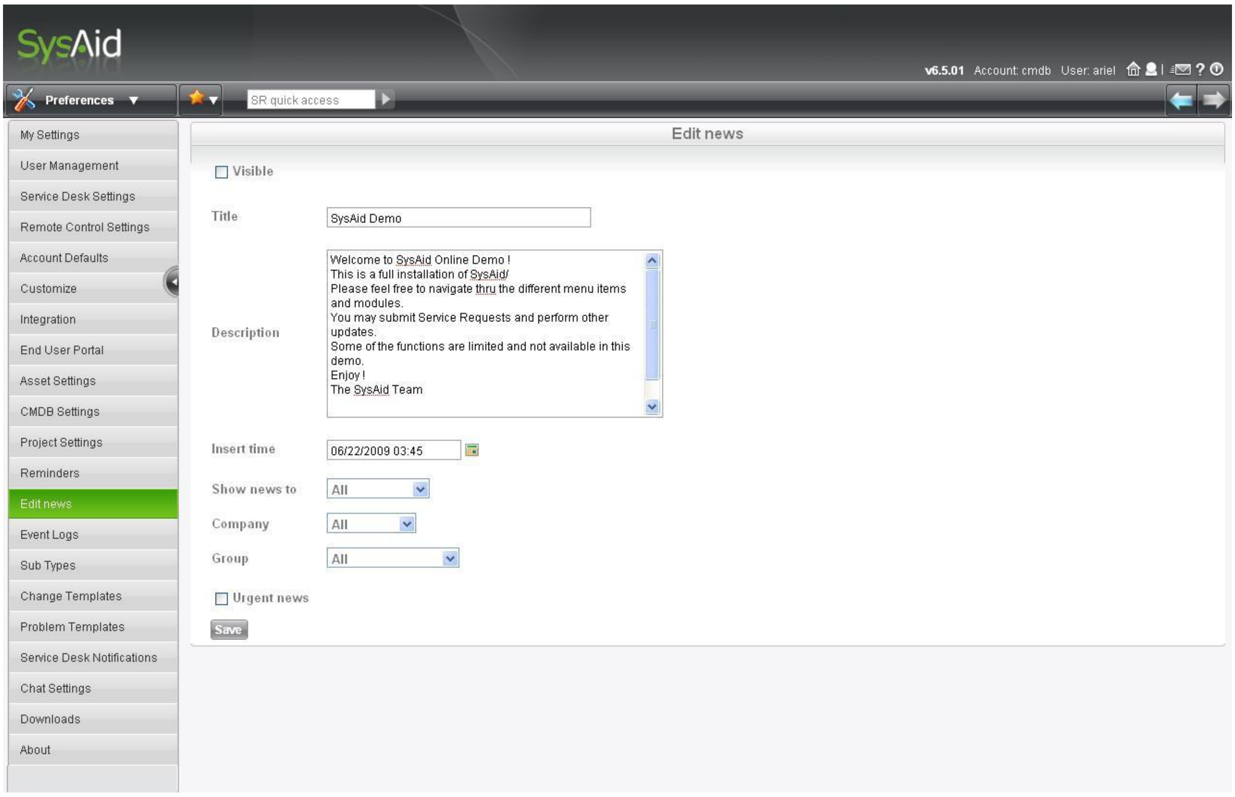
In SysAid you can update news for your administrators and end users. The news feature can be extremely useful to you when you have to announce some new and significant occurrence.

For example, if your network server is going to be down for a few hours during the week, you can announce this in the news and save calls from your co-workers saying that your server is down.

To edit your news:

1. From the SysAid home page click the **News** title at the left bottom of the page, under the main SysAid menu.
2. To create a new news item, click the **New** icon 

77 Editing News Item



3. Check the Visible box to render your news item visible.
4. Fill in the form with your news item title, the text of the item, and the time. In the news text field you may use html tags such as <b> and
 to edit your text.
5. From the dropdown menu choose to show the news either to your administrators, to your end users, or to both.
6. If the news is urgent, tick the check box to mark the item as urgent news. The title of your news item will appear in red.

7. You can also sort the news items according to dates.

8. It is also possible to edit specific news for a specific group of users or only to a specific company. To customize this, under Preferences→ Edit News click the dropdown menus to choose the relevant group or company.

News Items in your SysAid Homepage

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8.4 Email and SMS - Integration and Automatic Notifications.

One of the advantages of email integration is that responses to emails sent from SysAid itself do not go to a personal email box but are centrally returned to SysAid, so that other team workers can answer service requests when the assigned administrators are off on holiday or off sick.

SysAid supports integration with multiple incoming e-mail addresses. In the enterprise edition of SysAid, there is also support for multiple outgoing e-mail addresses.

In this chapter we will review:

- The function of e-mail integration within SysAid
- Configuring SysAid for outgoing and incoming e-mails.
- Configuring for SMS, if you have an SMS gateway account.

Outgoing Emails in SysAid

SysAid can be set-up to send e-mail notifications to administrators or to administrator groups assigned to address specific service requests. Moreover, when a person sends a response back to SysAid, you can also receive an e-mail notification so that you do not have to keep opening SysAid and checking for new responses.

Administrator may want to send an email from within SysAid, or SysAid could generate and send automatic notifications concerning, for example escalation rules. Under **Preferences→ Service desk Settings→ General Settings** tab choose whom to notify (end user, administrator, admin group) and on what occasions.

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If you have multiple outgoing email addresses set up (enterprise only), or if you allow administrators to send emails from their own email address, an administrator can choose the email address to use when sending an email from within Sysaid.

Incoming Emails in SysAid

SysAid can create a service request from an email alone, and thus accept service requests from non-registered end users. Also if an end user responds to an email sent to him/her from SysAid, this reply will be assigned to the service request and the status of the service request will be automatically changed. A notification can also be sent to your personal email.

Email integration addresses two situations that can arise: if a new e-mail is sent, it can be turned into a service request, and as it is turned into a service request you specify here what category, subcategory and urgency it should be given. If an email contains a service request number in the subject field (For instance, Subject: #11,383 Printer not working) SysAid matches and attaches this reply to the service request; and then SysAid emails the administrator that the status has changed.

Configuring Email

In order to send and receive e-mail from SysAid, the administrator must first provide SysAid with the outgoing and incoming email configurations of his/her organization. Go to **Preferences → Integration → E-mail tab.**

You have four options on the e-mail list page:

1. Create a new e-mail address.
2. Modify settings of an existing e-mail address.
3. Delete an existing e-mail address.
4. Allow your administrators to send e-mails from their personal e-mail addresses using SysAid.

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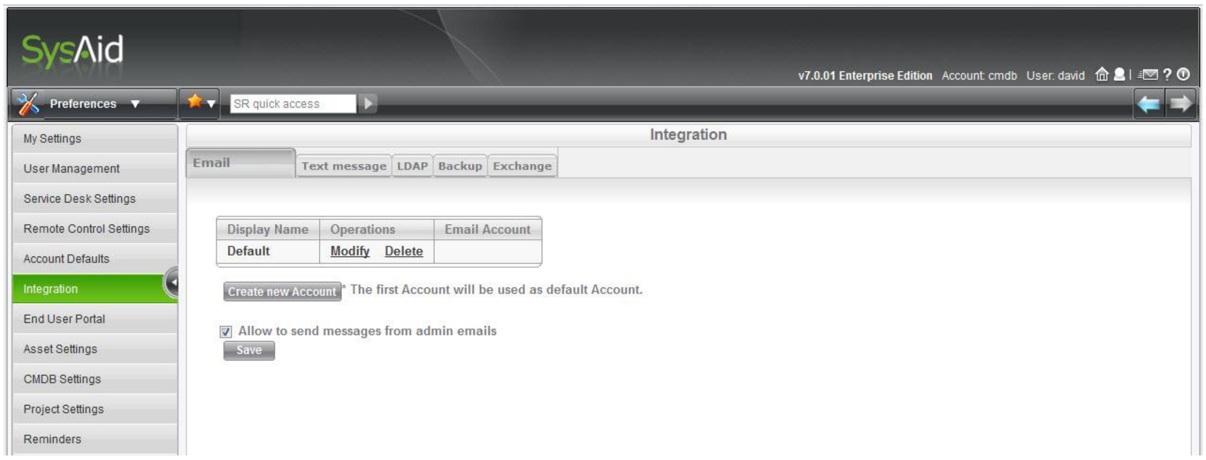
Note: The first email address in this list will be used by SysAid as the default address for outgoing emails. Therefore, it is recommended to keep your helpdesk's primary email address as the first item.

78 Configuring e-mail addresses



Creating a new e-mail address

Click the "Create new account" link. This will bring you to the e-mail configuration page. Fill out the fields as necessary and click "Save." Please refer to the table below for a description of all fields.

Note: In the Pro edition of SysAid, only one outgoing email address is allowed. Therefore, only the default e-mail address will have outgoing email settings.

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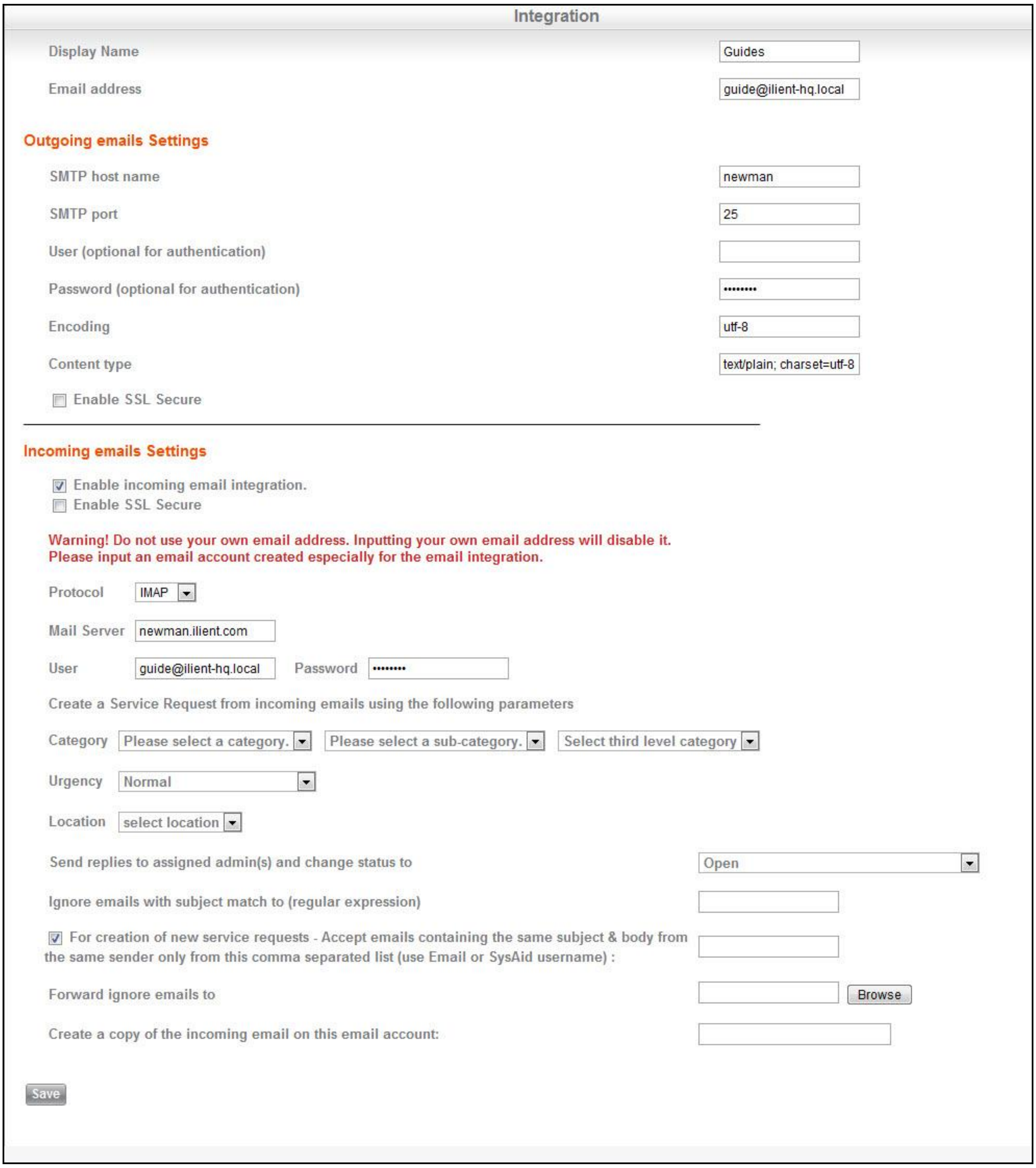
79 Setting up e-mail integration



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Outgoing email integration

Item	Description
Display Name	This is the name that will show up in the email address list.
Email Address	This is the e-mail address you are integrating with.
SMTP Host Name	If you do not provide SMTP information, SysAid will neither send any notification nor communicate with users concerning service requests; in effect, this mutes SysAid.
SMPT Port	
User (optional for authentication)	
Password (optional for authentication)	Your user password is only needed if your SMTP requires authentication.
Encoding	
Content Type	
Enable SSL Secure	You can allow SysAid to send emails using SSL encryption if your SMTP server supports SSL for outgoing emails

Incoming email integration

Item	Description
Enable Incoming Email Integration	If you enable email integration, input the necessary data into the appropriate fields. The email received will open as a service request. SysAid extracts email from an email box given with POP3, IMAP, or MAPI capability.
Enable SSL Secure	You can allow SysAid to receive emails using SSL encryption if your mail client supports SSL for incoming emails
Protocol	
Mail Server	
User	
Password	
Create a Service Request from incoming emails using the following parameters: Category, Urgency, Location	All e-mails created by e-mail integration will have the category, urgency, and location you specify here
Send replies to assigned admin(s) and change status to	When a service request is replied to, you will be sent notification and the status of that request in SysAid will be changed. Select the status from the dropdown menu.
Ignore emails with subject match to (regular expression)	For those emails that have in their subject matter, (insert regular expression) for example, (Undelivered Mail Returned) all such emails will be ignored. This option is meant to protect your email account from Spam.
For creation of new service requests - Accept emails containing the same subject & body from the same sender only from this comma	

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separated list (use Email or SysAid username):	
Forward ignore emails to	Insert the username of the individual who should receive the ignored emails.
Create a copy of the incoming email on this email account:	If you have the SyAid Enterprise edition, after SysAid has imported an e-mail into SysAid using e-mail integration, you can choose to have a copy of that e-mail sent to an e-mail address of your choice.

If you have left it, return now to the email list page.

Modifying an existing email address

Click the modify link next to the e-mail address you would like to modify. This will open the existing settings for this e-mail address and allow you to modify them (see above). Be sure to hit "Save" if you would like to keep the changes you've made.

Deleting an existing email address

To delete an e-mail address, click the delete link next to the e-mail address you would like to delete. When prompted, click "OK." Note that the first email, since it is the default address, cannot be deleted.

Allowing your administrators to send e-mails from their personal e-mail addresses using SysAid

If you check this box, administrators will be able to select their personal e-mail address as the "from" address when sending e-mails. (Their personal e-mail address is taken from their user profile under User Management.) This will allow administrators to conduct direct communication with end users using their own email account, instead of the general service desk address.

Note: E-mails sent in this way will be recorded on the service request they are sent from, but responses will go directly to the mail client of the administrator and will not enter SysAid. Keep this in mind for tracking purposes.

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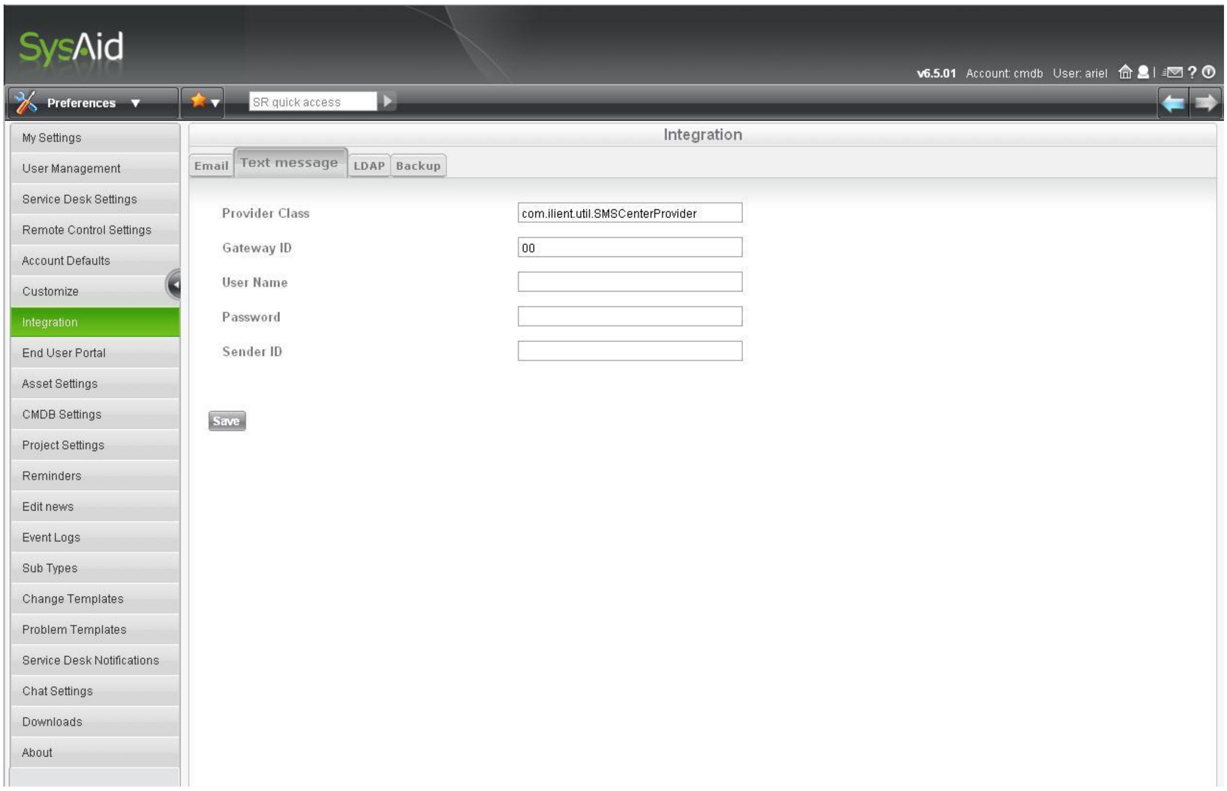
Configure SMS

1. Go to **Preferences → Integration → SMS** tab.
2. In order to use this option you should have a SMS gateway account.

One of the SMS gateways SysAid supports is clickatell (http://www.clickatell.com).

3. Complete all of the fields in the **SMS** integration page.

80 Setting up SMS Integration



4. Finally click **Save.**

Note that you can also customize an automatic SMS message to be sent according to your escalation rule. Go to **Preferences→ Service Desk Settings → Escalation Rules** tab, and choose from the dropdown list **Notification Method** to send an email, a text message, or both.

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81 Automatic SMS Message determined via an Escalation Rule

Table 5: SMS Integration

Item	Description
Provider class:	Your SMS service provider
Gateway ID:	Given to you by your SMS provider
User Name:	Given to you by your SMS provider
Password:	Given to you by your SMS provider

In order to completely integrate SMS with SysAid, you should also make sure you enable the option in the **General Settings** page, as described below. **(Preferences →Service Desk Settings →SMS)**.

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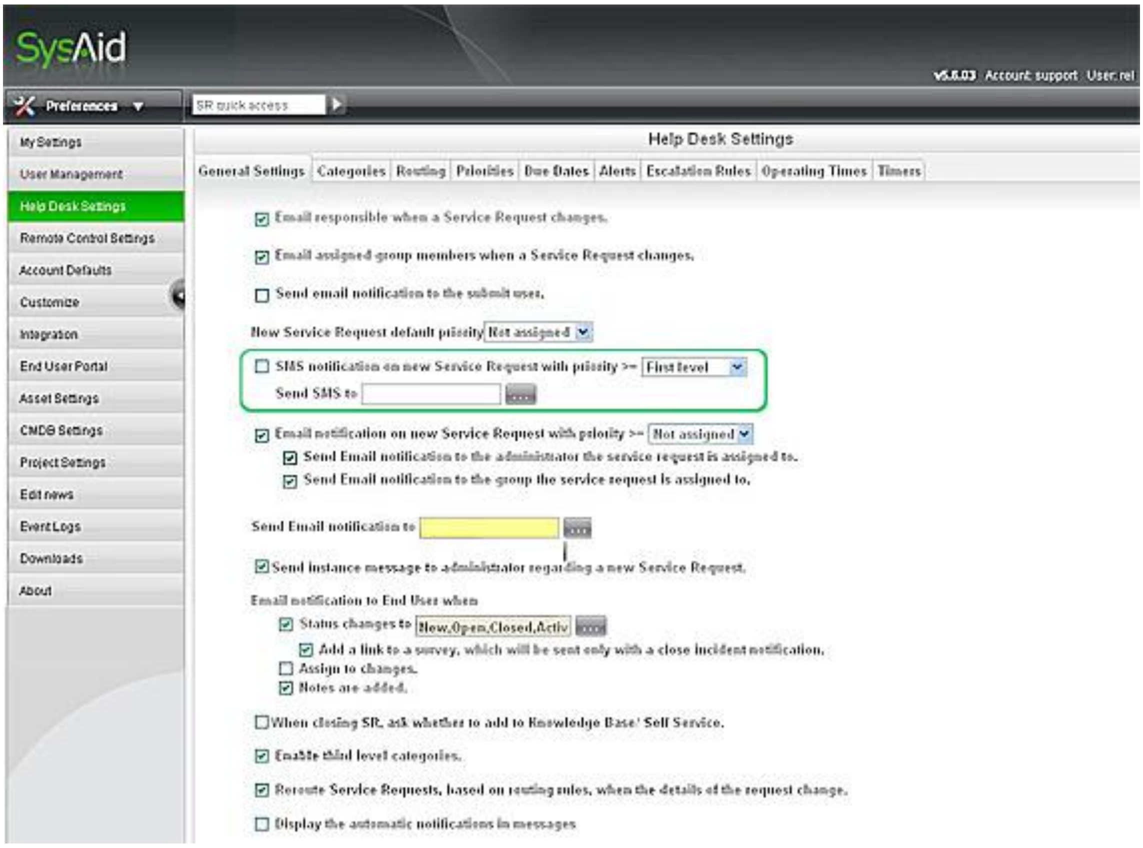
82 Enabling SMS Integration



Setting up Automatic E-mail and SMS Notifications

SysAid can automatically notify users via e-mail or SMS when certain help desk events, such as new or changed service requests, occur.

Note that you can decide whether you wish your individual administrators or end users to receive automatic notifications regarding their service requests from SysAid, or not. To choose to turn off the automatic notifications, you may uncheck the relevant boxes in the service desk settings general page, or to add the automatic notifications field under **Preferences→ My Settings**, and direct SysAid not to send the automatic notifications.

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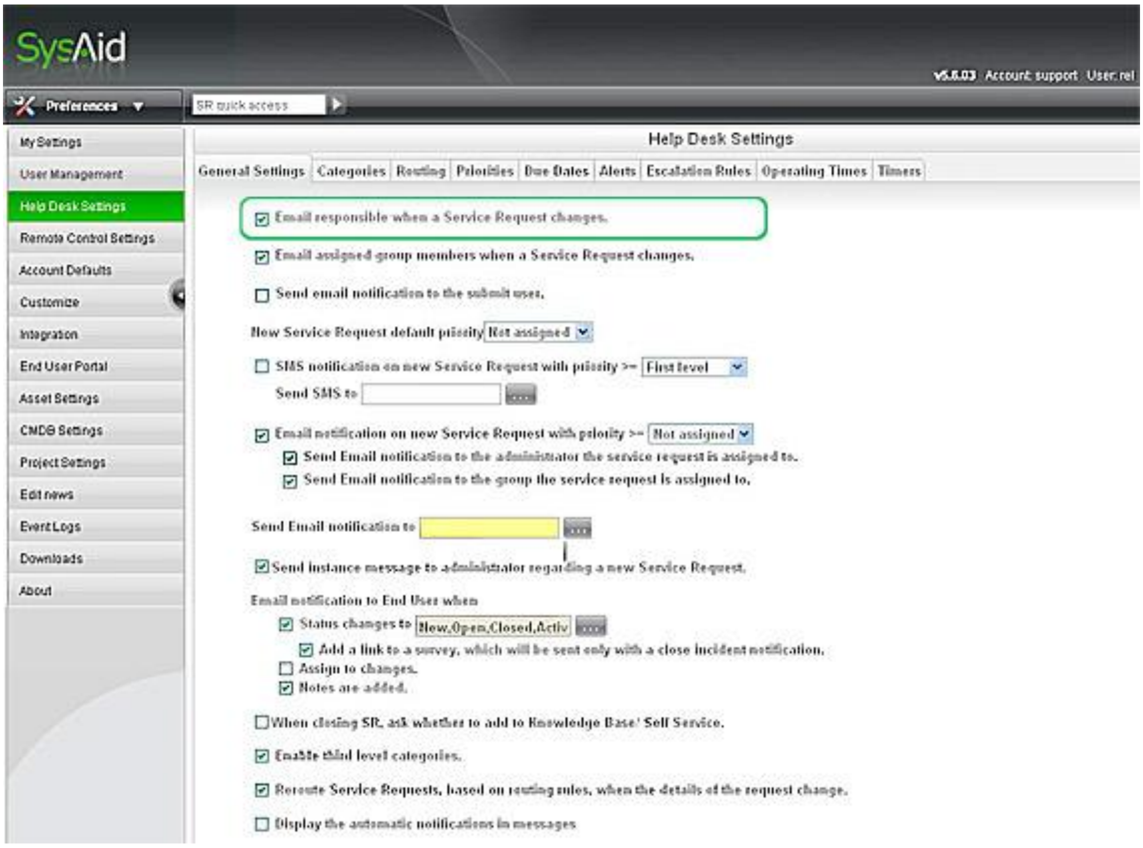
Go to the **General Settings** page (**Preferences → Help Desk Settings**)

83 General Settings page

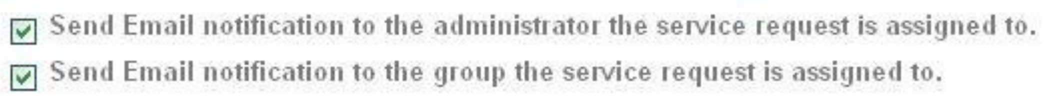


When a **service request** changes you can instruct SysAid to **email** the responsible **administrator**. Enable the tick box in the option below:

When a service request changes you can also instruct SysAid to email notifications to a group of administrators.

For this to work, you should also set up this option in the **Routing tab.** The submit user of a certain service request, by default will not be sent an automatic notification when the SR is opened and when changes are made in it, unless you check the box "Send email notification to the submit user" under **Preferences → Service desk Settings → General Settings.**

Also, you can choose to send notifications according to the identity of the administrator/admin group the service request is assigned to.



In addition, you can be notified of high priority requests by e-mail or SMS. This will only take effect **on all** service requests if service requests are not routed automatically to an administrator/admin group. If routing has been set up, the routing rule will take effect first, then the system of notifications will start to operate on the remaining service requests. It will send you notification on those service request that are not captured by the routing rule and which met the priority you selected.

It is possible to set SysAid to send the automatic notifications in the language of the user who receives them rather than according to the language of the default SysAid settings, as defined under **Preferences → Account defaults**.

You may enter your own custom translation variables, and translate them to your different languages and use them within the customized notifications.

In order to select the priority level from the dropdown box you should remember that: **1 = Urgent, is the highest number, with the highest level of alert and 5 the lowest number.** For example, selecting priority >/= Very High. If you will consult the coding menu Very high is 2, anything larger will include 1. So for all service requests coded 1 or 2 SysAid will issue a notification. **Insert the username of the individual** and not the SMS number or the actual email address.

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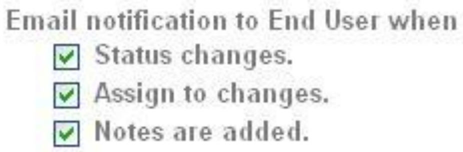
You have the option of sending an instant message to the administrator when a new service request is assigned to him/her. The administrator will be able to directly reach that request by clicking its link in the instant message.

SysAid can send the end user a notification when either the status of a service request changes (for instance, an open SR is closed), the service request becomes assigned to another administrator, or notes are added by the administrator to the service request. The option in **General Settings** is:



For detailed explanation of each option on the **General Settings** page see **Appendix 3**.

Integration with CTI

SysAid can be easily integrated with CTI (Computer Telephone Interface). The new process can be as follows: when a CTI system identifies the caller, SysAid can now open a service request according to ID number, or any other field you choose for identifying the caller. A caller can be identified automatically or requested to dial his/her ID number, and a new service request is opened, and the request user field is populated accordingly.
For example, if you identify the end user according to phone number, to verify that the details of the end user will automatically appear in SysAid (either in the SR or the phone call page) configure the following URL:
New Phone call

http://<your_server>:8080/SRPhone.jsp?id=0&autoUserField_phone=1234567

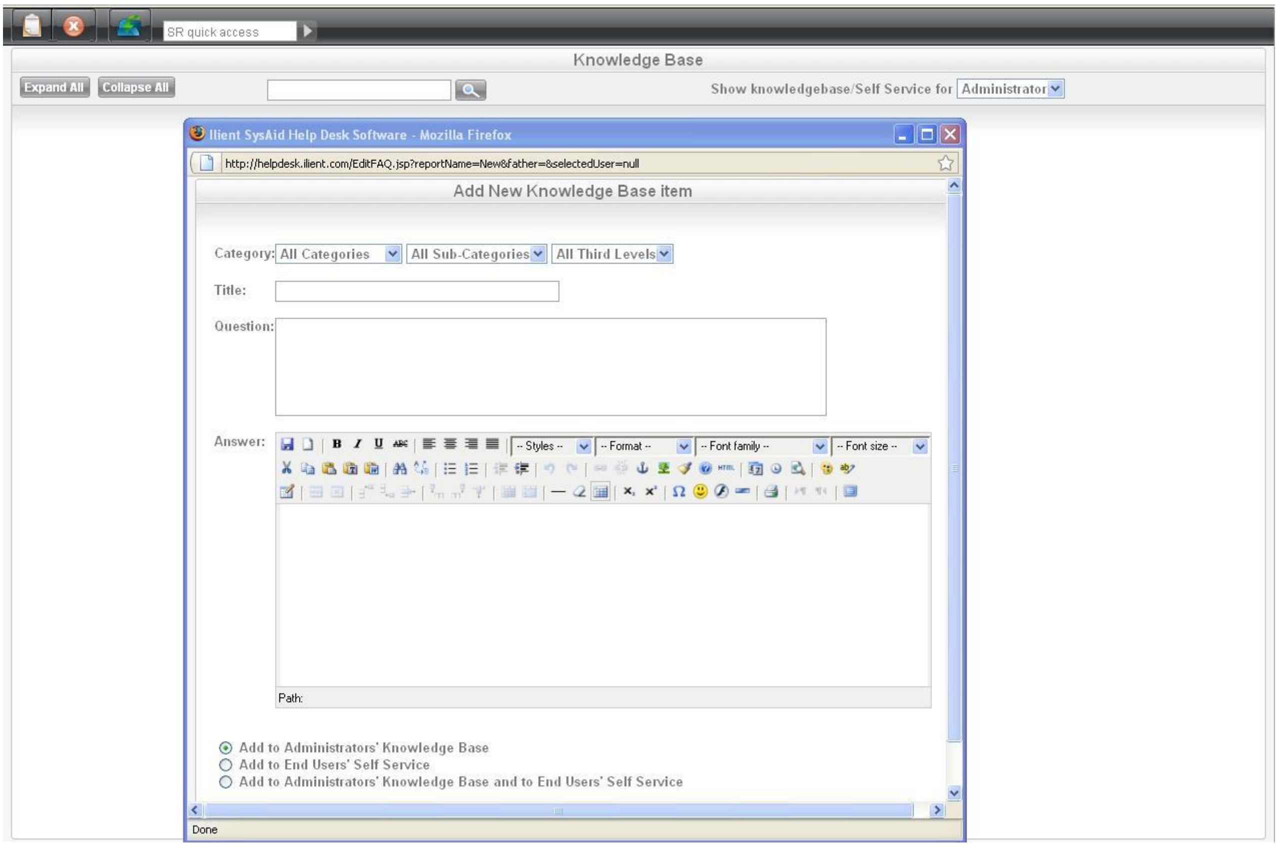
New Service Request
http://<your_server>:8080/SREdit.jsp?id=0&autoUserField_ phone=1234567

autoUserField_phone : in this example we used the phone field as a lookup field – you can use any field name from the End user – see field names in the database manual under table named Sysaid_user.

8.5 Configure your Knowledgebase

SysAid enables the option of creating a knowledgebase for administrators, that includes important information for your IT team, and recurring service requests and their solutions.

To create a new knowledgebase item, go to: **Helpdesk→Knowledgebase**
A new screen will open, with a list of your knowledgebase items. You may browse the list, or use the **Expand All** and **Collapse All** buttons to view the list the way you prefer. Click **New** to create a new item.



Insert a title, the question/problem and a solution. You may use the editing options to format your text.
Use the radio buttons to choose whether to keep your new item in the knowledgebase (for administrators), the Self Service Portal FAQs (for end users) or both.

Another option is to turn a service request immediately into a knowledgebase item or FAQ. The instructions for this are specified later in this chapter.
SysAid also allows you to add attachments (such as pictures or PDF files) to knowledgebase items. They will be added as links in the text. You can edit them by highlighting the text and clicking the link icon.

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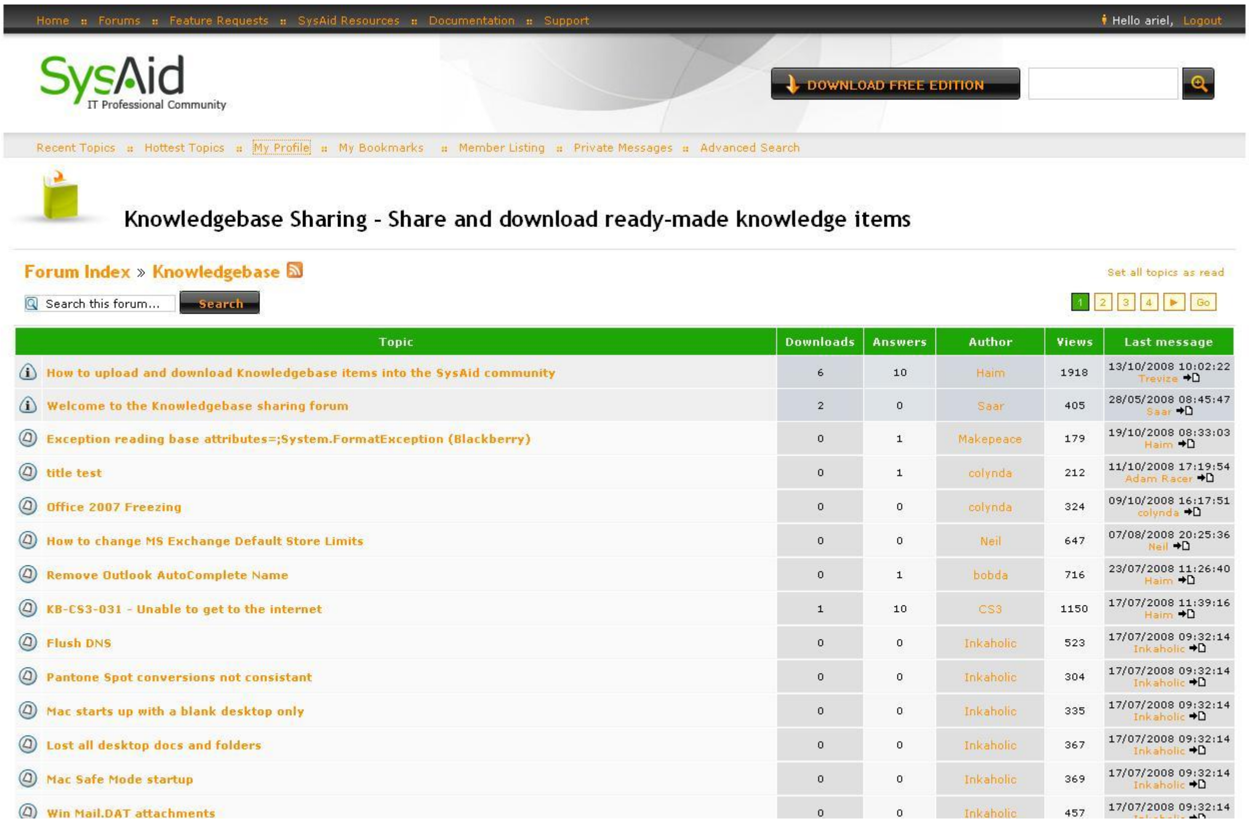
It is most recommended to take advantage of the SysAid Community when configuring your knowledgebase. If you are not yet registered, please go to **Preferences → My Settings → My community Settings** tab, fill in your details and click **Save**.

You may find many knowledgebase items used by IT experts all over the world, which are also relevant to your helpdesk. Visit the SysAid Knowledgebase forum at: http://ilient.com/Sysforums/forums/show/58.page

85 SysAid Community: Knowledgebase Sharing



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To download an item, go in the community to **My Profile,** and fill in your Local SysAid Server URL in the form. You need to be registered in the SysAid community to be able to download an item. If you are not yet registered, please go to **Preferences → My Settings→ My community Settings** tab, fill in your details and click **Save**.
To import Knowledgebase items from the SysAid community, click the icon "Download directly to my SysAid" in the community. The item will be imported to your local server.

You can also take part in the SysAid community by uploading you own knowledgebase items or FAQs, for the use of other IT experts. Click the **Upload button** to upload your own data.

If you seek help in operating SysAid, you can easily reach online help pages from within the SysAid community. View and comment the online help files, that include specific explanations regarding the various pages of SysAid. To view the help files from within your system (rather than online) click the question mark icon at the top right corner of the SysAid interface.

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8.6 Configure the End User Portal

In SysAid there are three types of users:

- End users, who seek help desk support.
- Administrators, who manage the organization's help desk, assets, purge database and manage projects.
- Managers, who overview the organization, generate, run and schedule reports.

When managers and administrators log into SysAid, they see various screens and functionalities. When end users log into SysAid, however, their options are more limited. Administrators can configure what end users will see when logging in. The **End User Portal** is an optional screen for end users. It offers the end user the opportunity to:

- Submit service requests
- View an FAQ maintained by SysAid administrators
- View details of their submitted service requests (and of other requests, in case they are supervisors)
- Add notes to their submitted service requests
- Change their settings, such as name, password, etc.
- Chat with support team members

The End User Portal editing function appears under Preferences in your SysAid sidebar menu (click on Preferences to see it). To change the End User Portal settings, click on the End User Portal link under Preferences. To view the End

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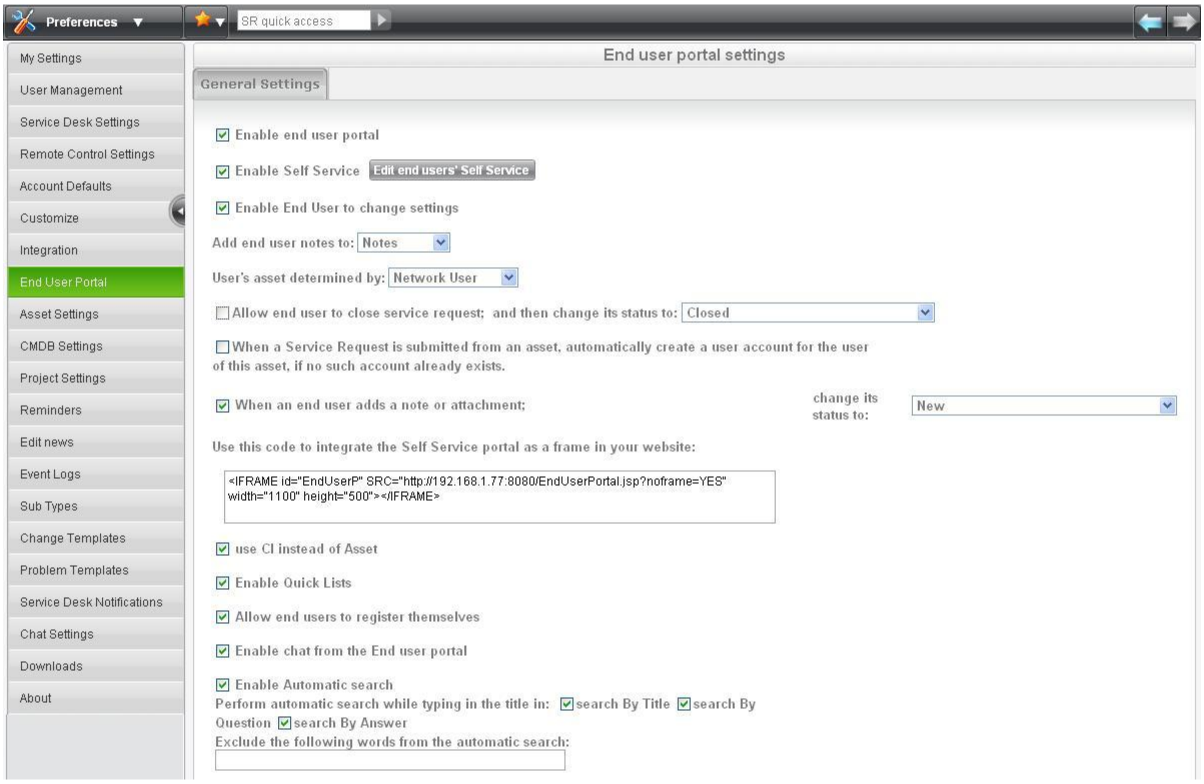
User Portal as an end user, however, click the icon of a figure in the upper right corner of your SysAid application screen .

Here are the administrators' options for configuring the End User Portal.

86 End User Portal Settings



The first checkbox, **Enable End User Portal**, at the top of the page, lets you enable or disable the **End User Portal**. When the **End User Portal** is disabled, end users will see only a screen for submitting service requests. They would have other options only when the **End User Portal** is enabled.

It is also possible to check the box **use CI instead of Asset** so that End Users will be displayed with CI-s instead of assets and they will have to choose a CI that belongs to them when submitting a service request.

The second checkbox, **Enable Self Service (FAQ)** lets administrators enable end users' self service. Optionally, you can create a self service screen for end users. This lets end users find solutions to common problems themselves, sparing administrators from answering recurring questions. End users can view

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the self service FAQ only via the **End User Portal,** so to enable the self service, the **End User Portal** must be enabled, as well.

The third option, **Enable Settings**, determines whether to let end users change their settings. This option, too, is available to end users only within the **End User Portal**.

End users can add notes to their old service requests using the following radio buttons:

○ Add end user notes to

○ Notes Description

You can decide where these notes will be added to: The service request notes field or the service request description field.

You can configure SysAid to automatically notify the end user when a note is added to his/her Service Request. Under **Preferences → Service desk Settings**, tick the box "Email notification to end user when notes are added".

Under **Preferences→ End User Portal Settings**, you can also copy the code for adding the SysAid Self Service Portal as an iframe to your own website. Simply paste this code at the place you wish to see SysAid End User Portal in your own website. All you have to do is fit the size of the frame to your website.

You may save yourself the time of registering end users into the End User Portal, by allowing them to do so independently. All you need to do is check the box "Allow End Users to register themselves" in this page. This will create a link that End Users will be able to use when entering the End User Portal, to register themselves to it.

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87 Independent Registering into the End User Portal

You can also enable chat between administrators.

Another option here is to edit the quicklist for end users. The quicklist offers your end user a template for submitting their service requests in common issues, and saves them time and effort when submitting their requests. SysAid will automatically fill out the request details for the end user, in common issues. To learn more about setting your quicklists, please check **chapter 7: Advanced Configurations** in this guide.

SysAid allows you to determine in detail the options for automatic search available for end users. While the end user types the title of the request, SysAid suggests knowledge base eateries that may be related to the request. In this way the end user is more likely to find the solution for the problem independently, and save the time of the service team. Use the check boxes to determine whether SysAid should search the knowledgebase for similar titles, questions or answers. You can also type a list of words that you wish to exclude from the search.

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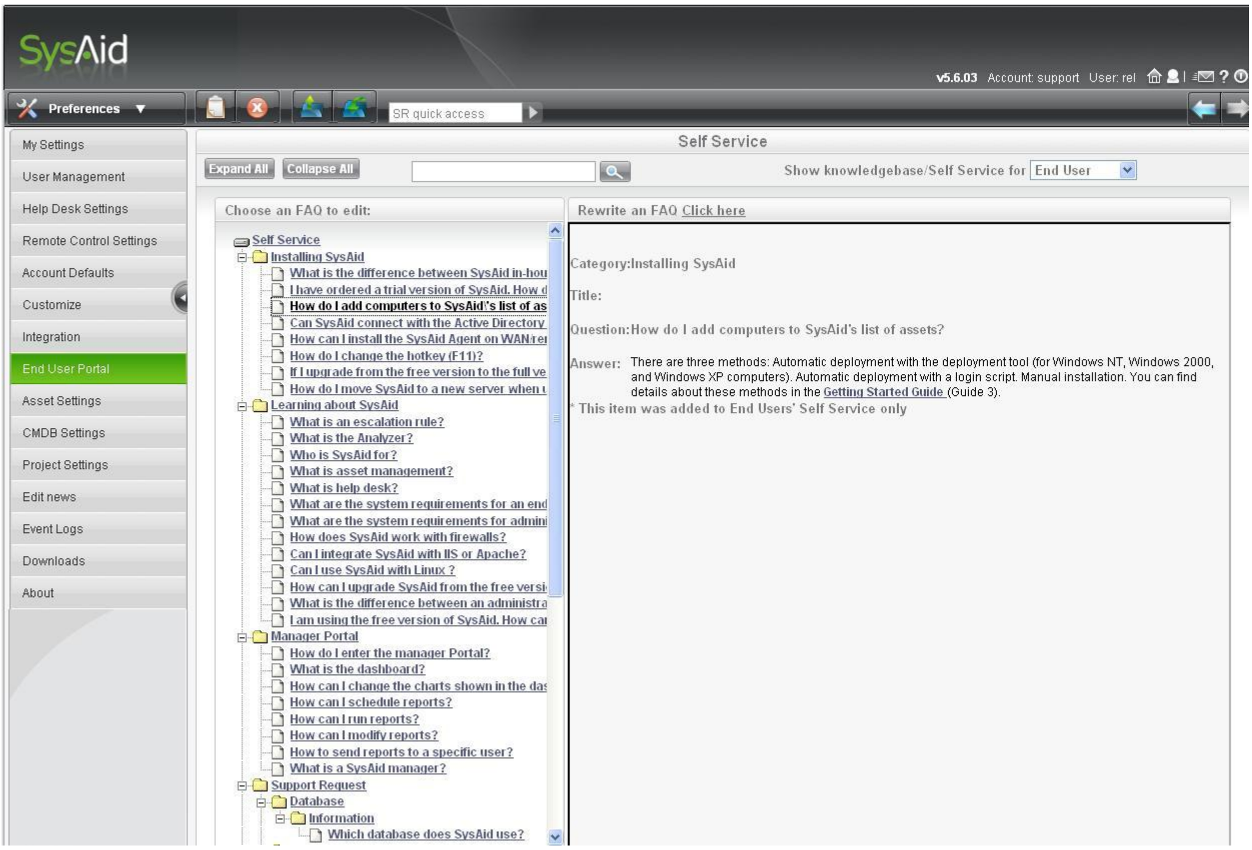
You can edit the self service by clicking on the **Edit End Users Self Service** link. You will reach a screen where you can create and edit FAQ items. End users will see these items when logging into the portal.

Click on **Add New FAQ** button. You will reach a form for adding an FAQ item. Select a category, input the common question, and input the solution. In the self service screen, the FAQs will be sorted by category. The FAQs you add will be listed in the **Edit End Users Self Service** screen. Click **Modify** next to an FAQ item to edit it. Click Delete to remove an entry. If **Self Service** is enabled, the End User will see this FAQ. When you have finished configuring the **End User Portal**, click **Save**.

88 Editing the FAQ page



You can also configure what fields an end user will see when viewing his or her old service requests. For example, perhaps you want end users to see the status of their old service requests, but not their priority. The fields the end user can

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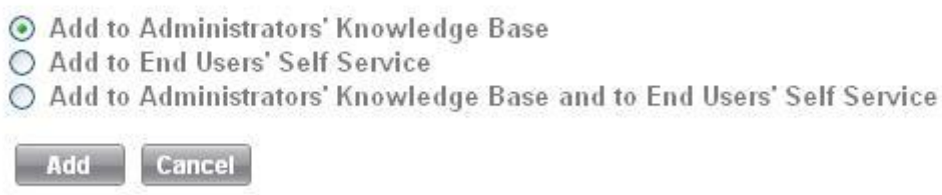
see are known as the EndUser View. You can learn about customizing views in chapter 7 .

Turning a Service Request into a FAQ/KB item

You can save time by creating an FAQ for end users or a knowledgebase item for administrators directly from a service request. This feature is most useful when you receive multiple service requests regarding the same problems.

To turn such a repeating SR into a FAQ or into a knowledgebase item, click the link *Add to knowledgebase* in the SR **General Details** page. A popup screen with various designing options, will open, and the relevant fields of the SR already appear: category, title, description, and solution. You can also design the appearance of the text.

Choose from the radio buttons that appear at the bottom of the popup screen whether you wish to create a new FAQ, a new knowledgebase item, or both.



Note that when you search for a KB item from within a specific service request, SysAid will focus its search for KB items with the same categories as the service request.

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Supervisors

The full edition of SysAid includes a feature that allows nominating particular end users as their department or their company's supervisors. To learn more about the SysAid Full edition, please follow this link: http://ilient.com/fullversion.htm .

The supervisor will be able to see all service requests of his/her supervised end users. Needless to say, nominating end users as supervisors can offer a great advantage in improving your workflow and in reducing the workload on administrators.

To determine that a certain end user will be a **company supervisor**, you have to:

1. First set at least one company in the dropdown menu of companies (**Preferences→ User Management→ Companies**)
2. Then attribute end users to a company (**Preferences→ User Management→ End User Manager→** click a row entry→ **General Details**). In case the **Company** field does not appear in the **General Details** form, click the **Customize** icon and in the popup screen add "company" to the visible fields. The process of linking end user to companies is further elaborated in **Chapter 3 Setting up Users** (page 24) of this guide.
3. Under the General Details tab of that end user you wish to nominate as a supervisor, click the **Customize** icon , and add "Is supervisor" to the list of visible fields.

4. Choose from the dropdown menu to make this end user into a company supervisor.

To determine that a certain end user will be a **Department supervisor**, you have to:

1. First you need to add a menu which includes at least one department. Go to **(Preferences→ Customize→Customize Lists)**.
2. Choose "Department" from the dropdown menu. In the caption box add at least one name for a department, and add a key number. You can add any sequence of numbers to the list of departments, as long as you do not repeat the same key number for different departments. Click **Add** to add a new department to the menu. Finally, click **Save**.
3. Then attribute end users to a department (**Preferences→ User Management→ End User Manager→** click a row entry**→ General Details**). In the **General Details** form, click the **Customize** icon  and in the popup screen add "department" to the visible fields, with the arrow button.
4. Under the General Details tab of that end user you wish to nominate as a supervisor, click the **Customize** icon , and add "Is supervisor" to the list of visible fields. Choose from the dropdown menu to make this end user into a department supervisor.

You can also add the "Is supervisor" to the visible field using the Customize icon in the **End User Manager** page. Thus, you will be able to immediately see your supervisors.

Asset User determined by:

This performs a check when the end user initially logs into his/her computer using his/her username and password and matches this later on to the login information given in SysAid.

If you are not sure what the options mean and the effect they can have, keep the default setting (Network User) as they are.

The three options are:

Network User - If you have a standard network that matches username and password for Windows authentication, select this option. This is the default setting.

Domain and User – This option is selected if you have more than one active directory (more than one LDAP), and your users login using domain name/username.

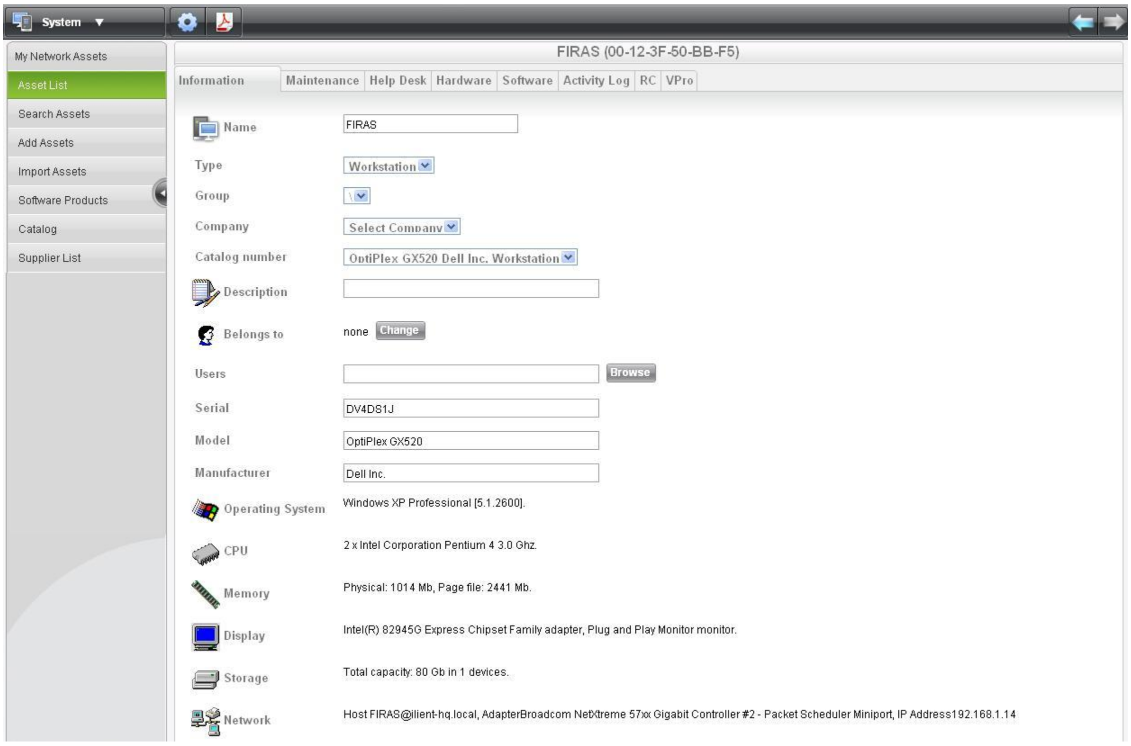
Asset Owner -This option can link one person **only** to an asset. This option will cause a service request to be based on an asset owner.

The advantage of this option, for instance, is for companies that are external IT service providers. The clients of such a company do not have access to the active directory of that company and therefore a contact person is required for a particular asset. This option lets such companies have the contact information of their clients. With this option the asset binds to a specific user and creates a contact person.

If you select **Asset Owner** you should ensure you link the asset to an individual. To do this:

1. Go to **Asset management → Asset List.** Enable the check box of the asset in question, and then double click on the asset to open the **Information** page.
2. Go to the **Belongs to** field, and link the right person to the asset. Click **Ok** to finish.
3. Finally to set this up for the end user, go to Preferences → End User Portal → Asset user determined by, select Asset Owner. Finally click Save.

89 Information page for an asset



Finally there is an option for individuals to submit service requests even though they are not end users of SysAid. To activate this option, go to **Preferences→**

End User Portal and from the dropdown menu choose the Asset Owner option. Then, enable the check box:

When a service request is submitted from an asset, automatically create a user account for that asset's user, if no such account already exists.

Related Guides and Reading

Guide 7: End User Manual
http://www.ilient.com/down/end_user_manual.PDF

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Chapter 9 Reports in the Analyzer

SysAid offers a reporting function via the **Analyzer** portal.

SysAid provides various standard reports, which can be customized by utilizing the various dropdown menus. These reports are the same as the reports available in the **Manager Dashboard**. In the Analyzer, however, the options are much more limited. If you have the full edition of SysAid you can run, modify, send, schedule and perform more actions on these reports. To learn more about the SysAid Full edition, please follow this link: http://ilient.com/fullversion.htm . Please read chapter 11 in this guide to learn more about the reports in The **Manager Dashboard**.

The Analyzer stores reports in three folders:

- **Help Desk** (containing two subfolders **Work Load** and **Service Quality**).
- **Inventory**
- **Highest Values Reports**

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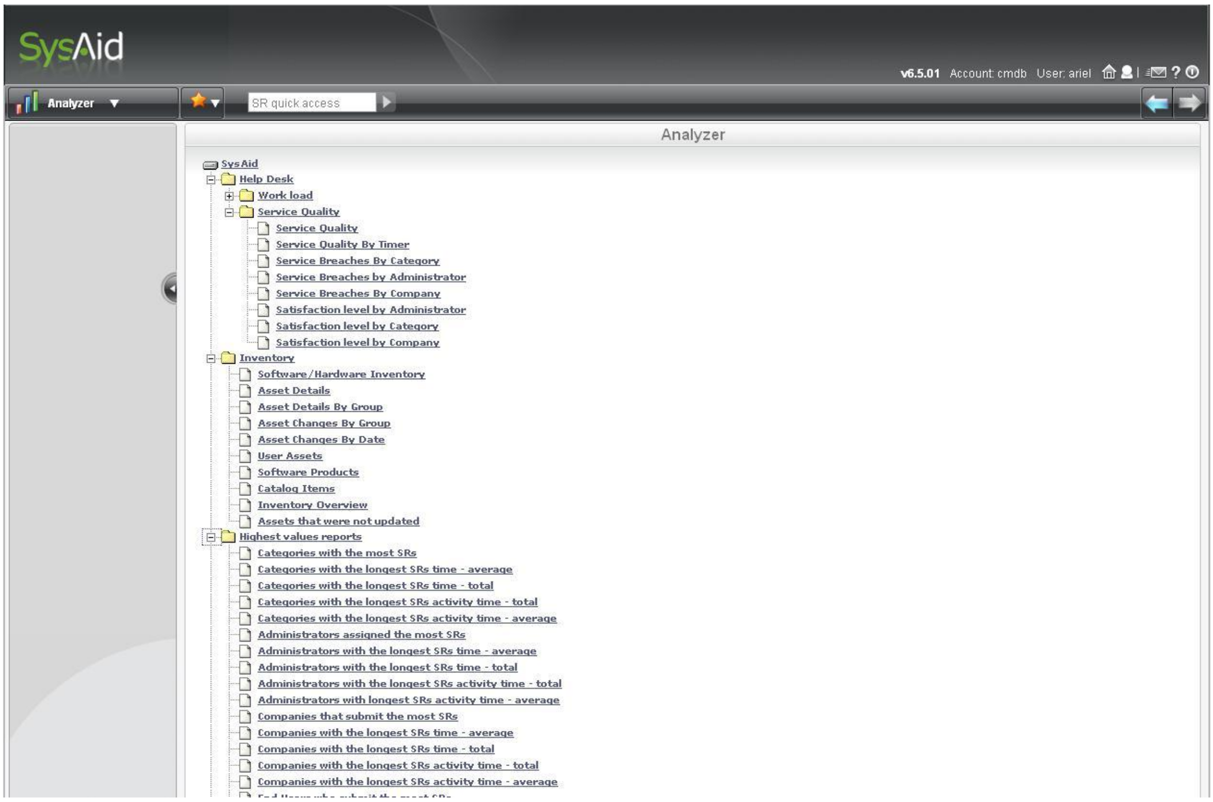
90 Analyzer



Access a report by clicking on the plus + sign next to the yellow folder, to open its contents. Listed in the table below are the reports that can be generated in the Analyzer.

Table 6: Report contents in the Analyzer file tree

Folder	Report Name	Content of report
Help Desk/Workload		
	Active Requests	Number of active service requests- broken down by category, company asset group, group, admin, end user, priority or urgency. Data displayed in – Table.
	Opened/Closed Requests per Period	Number of opened and closed service requests during a specific period (day, week or month). Data displayed in – Table & line graph.
	Opened/Closed Requests per category	Number of opened and closed service requests for a selected category. Data displayed in – Table & bar

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		chart.
	Opened/Closed Requests per company	Number of opened and closed requests by company. Data displayed in – Table & bar chart.
	Opened/Closed Requests per administrator	Number of opened and closed service requests by administrator. Data displayed in – Table & bar chart.
	Opened/Closed Requests per admin group	Number of opened and closed service requests by administrator group. Data displayed in – Table & bar chart.
	Opened/Closed Requests per priority/urgency	Number of opened and closed service requests by priority or urgency. Data displayed in Table.
	Detailed Closed/Active Requests per Period	Number of closed and active requests according to period (day/week/month). Various resolutions available with Grouping filter. Data displayed in Table.
	Help Desk Activity Summary	Provides service request totals. You can choose from a group variable and sub-group variable in your report. Data displayed in Table.
	Activities By Administrator	Lists activity per service request number. Includes date worked on, title, description and length of time. Also includes service request type. Data displayed in Table.
	Workload by Administrator	Lists number of service requests, activities and times by administrator. Data displayed in Table.
	Service Requests per third category	Summarized number of service requests, specified for the third level category.
Service Quality		
	Service Quality	Number of service requests opened, and the mean time to repair (MTTR) is the default setting. Data displayed in table listing.
	Service Quality By Timer	Summarizes the number of service requests, date service request opened and average time taken to repair in days. Data displayed in table.
You must complete the field: **Threshold in hours**		
	Service Breaches By Category	Breaches are broken-down by category.

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		Mandatory marked with asterisk (*)- specify the threshold in hrs. Average time to repair (hr, mins) – listed per category. Data displayed in - table and bar chart.
	Service Breaches by Administrator	Calculates "time to repair". Mandatory marked with asterisk (*)- specify the threshold in hrs. The report then calculates the number of breaches by admin and the average time. Displays data in table and bar chart.
	Service Breaches by Company	Breaches are broken down by company. Mandatorymarked with asterisk (*) – specify the threshold in hrs. The average time to repair per company is listed (hr, mins). Displays data in table and bar chart.
Inventory		
	Software/Hardware Inventory	Lists software and hardware. You have the option to enable: **Show assets details.** This gives a further breakdown. Data displayed in Table
	Asset Details	All the details of one asset you select are provided. Data displayed in Table.
	Asset changes by group	This report lists those changes that have taken place for an asset during the dates specified. It lists the changes according to asset group. Data displayed in Table.
	User Assets	Select a user, all the assets for that user will be listed. Data displayed in Table.
	Software Products	Software products for a company or all companies are listed. You can also choose to show an assets details. Data displayed in Table.
	Catalog Items	Lists the contents of your catalog plus provides a count of the number of assets you have that are listed in your catalog. Data displayed in: Table.
	Inventory Overview	Provides overview of inventory. Range of graphics.
	Assets that were not updated	Lists assets that were not updated, including their details, hardware, software, user, etc. Data displayed in Table.
	Assets with the most Service Requests	This report presents the assets from which the highest number of service requests were sent, during

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		the specified period.
Highest Values Reports		
The default is five listed items for each highest values report. However, you can easily customize the number of reported items. To learn how to do so, please consult **chapter 11: The Manager Dashboard** in this guide.		
	Categories with the most SRs	Lists the top 5 categories which contain the most service requests.
	Categories with the longest SRs time-average	Lists the top 5 categories with service requests that took the longest time to solve, in average.
	Categories with the longest SRs time - total	Lists the top 5 categories with service requests that took the longest total time to solve.
	Categories with the longest SRs activity time - total	Lists the top 5 categories with service requests of which the total activity time is the longest.
	Categories with the longest SRs activity time - average	Lists the top 5 categories with service requests of which the average activity time is the longest.
	Administrators assigned the most SRs	A list of the top 5 administrators who are assigned the most service requests.
	Administrators with the longest SRs time - average	A list of the top 5 administrators who took the longest average time to solve their service requests.
	Administrators with the longest SRs time - total	A list of the top 5 administrators who took the longest total time to solve the service requests assigned to them.
	Administrators with the longest SRs activity time - total	A list of the top 5 administrators who invested the longest total activity time to solve the service requests assigned to them.
	Administrators with longest SRs activity time - average	A list of the top 5 administrators who invested the longest activity time in average to solve the service requests assigned to them.
	Companies that submit the most SRs	A list of the top 5 companies that submitted the most service requests.
	Companies with the longest SRs time - average	The top 5 companies whose service requests took the longest time to solve, in average.
	Companies with the longest SRs time - total	The top 5 companies whose service requests tool the longest total time to solve.
	Companies with the longest SRs activity time - total	The top 5 companies whose service requests took the longest activity time in total.
	Companies with the longest SRs activity time - average	The top 5 companies whose service requests took the longest activity time in average.
	End Users who submit the most SRs	A list of the top 5 end users in terms of the submission of service requests.

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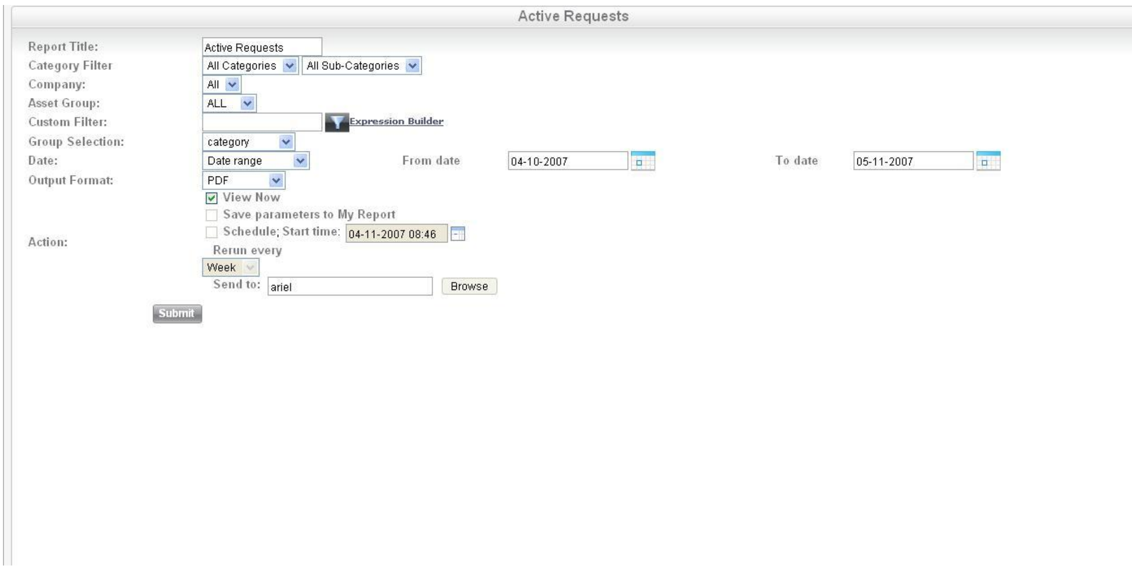
	End Users with the longest SRs time - average	The top 5 end users whose service requests took the longest average time to solve
	End Users with the longest SRs time - total	The top 5 end users whose service requests took the longest total time to solve
	End Users with the longest SRs activity time - total	The top 5 end users whose service requests involved the longest total activity time
	End Users with the longest SRs activity time - average	The top 5 end users whose service requests involved the longest average activity time
Projects and Tasks Reports		
	Tasks-Projects-Activities-overview	This report provides an overview of all the activities in projects, according to different tasks.
	Task activities by administrator	You can see the different activities according to administrators.
	Tasks per User	Different tasks presented according to the responsible user.
	Tasks per statues	Presents the tasks according to their statuses
	Tasks per project	Presents the tasks according to the projects they belong to.

Clicking the name of a report will open a new page, which contains a form that helps you to set the parameters in the report.

91 Active Requests page


Active Requests

Report Title: Active Requests
Category Filter: All Categories / All Sub-Categories
Company: All
Asset Group: ALL
Custom Filter: Expression Builder
Group Selection: category
Date: Date range From date 04-10-2007 To date 05-11-2007
Output Format: PDF
Action: View Now
Save parameters to My Report
Schedule; Start time: 04-11-2007 08:46
Rerun every
Week
Send to: ariel Browse
Submit

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Some of the parameters that you can set in these forms are: Category, Sub category, company, asset grouping, custom filter, output format, date range, and number of records.

Select the specific parameters. Click the **Submit** button.

For more information about setting the parameters of the report, please consult **The Manager Dashboard** chapter in this guide.

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Chapter 10 Project and Task Management

The *Project* and *Task Management* tool (Tasks/Projects) is available in the full edition of SysAid and in the full edition 30-day trial. To learn more about SysAid Full edition, please follow this link: http://ilient.com/fullversion.htm . *The Free Edition does not have this module.*

This feature, has been designed for Projects and Tasks management, and allows members of staff to:

- Track progress
- Track resource usage (personnel)
- Allocate time wisely
- Keep record of all activities
- Store relevant documentation
- Review and record all versions of the project (A version numbering method provides the user with a record of changes made to the project over time).

With **Project and Task Management**, one can focus on improving time management, track expended resources and oversee the successful completion of project deliverables. User-specific customization is available in **Project and Task Management**. The **Project and Task Management** interface allows you to manage multiple-projects, add file attachments and input detailed information on project milestones and on personnel.

Working in the task interface you can easily build your project step by step. By detailing all necessary tasks, you come closer to fulfilling the goals of your project. In addition, all service requests associated with a project can be conveniently reviewed.

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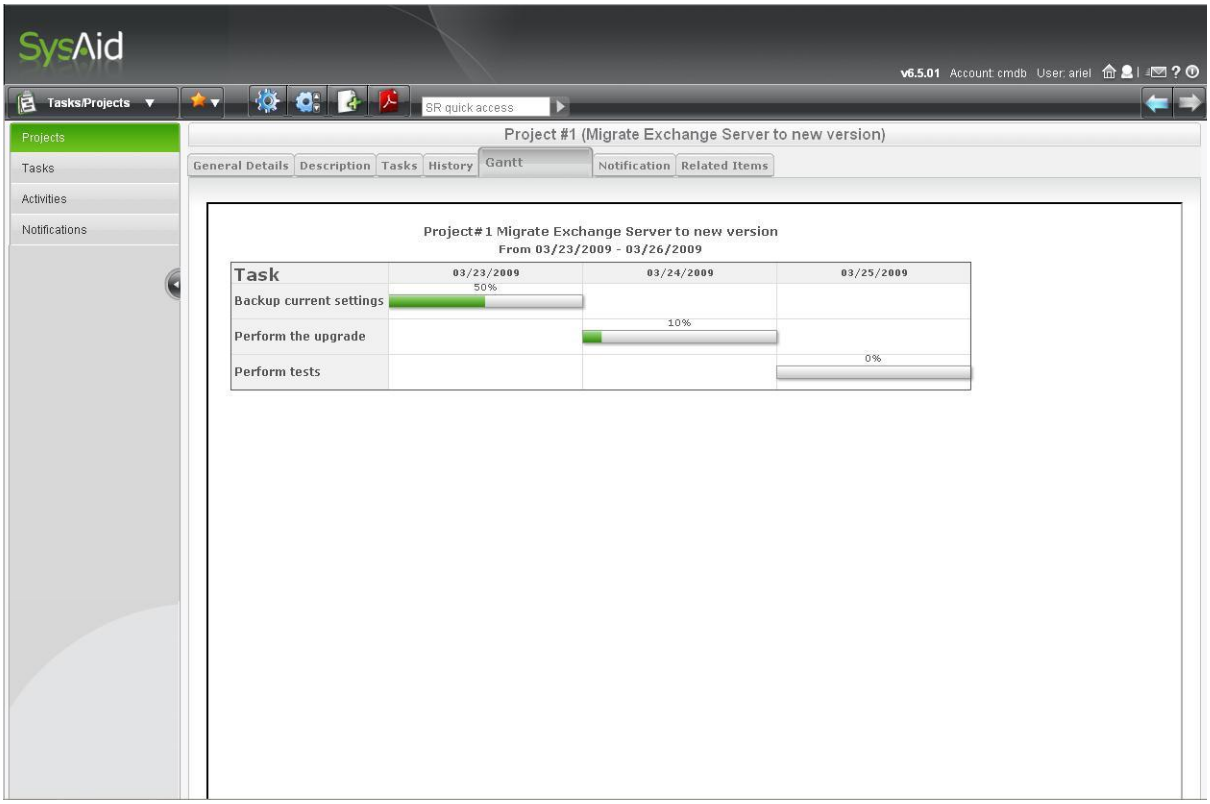
The SysAid **Projects and Tasks** module is strongly integrated with the **Helpdesk** module. You can attach tasks to service requests for better control and follow-up capabilities, and you can determine that tasks will automatically open new service requests, to improve your service quality.

The **Project and Task Management** module is suitable for small as well as for large scale projects.

92 Gantt Chart displaying the grouping of tasks per category



See the full Projects and Tasks Guide:

http://ilient.com/down/Project%20and%20Task%20Management.pdf

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Chapter 11 SysAid Manager Dashboard

The **Manager Dashboard** is a module in SysAid, which provides a full suite of reporting features. In the **Manager Dashboard** the user can take advantage of standard reporting features or customize entirely his/her own reports.

Here are some of the advantages SysAid Manager Dashboard can offer:

- An immediate and customizable overview of the state of affairs in your organization
- A wide choice of reports that can be scheduled, customized, and sent to different users
- Various possibilities to modify reports according to your specific needs, or to create entirely new reports
- An immediate and customizable graphic Dashboard overview of the state of affairs in your organization.

The **Manager Dashboard** tool is available in the full edition of SysAid no. 4.0.1 and up. To learn more about SysAid Full edition, please follow this link: http://ilient.com/fullversion.htm . Note that *the Free Edition does not include this module.*

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93 SysAid Manager dashboard

Please see the full Manager Dashboard Guide for full details

http://ilient.com/down/Manager%20Dashboard%20Guide6.pdf

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Chapter 12: IT Benchmarks

The IT Benchmark is a dynamic **measurement tool** that translates the raw data of your IT activities into meaningful facts and numbers. As an innovative feature indispensible to the analysis of your IT department's performance, the IT Benchmark is a landmark module **completely unique to SysAid**.

With the IT Benchmark, you can compare your current IT statistics with data from previous months and years. Furthermore, you can compare your department's statistics with thousands of other IT departments worldwide.

These statistics lend themselves to immediate analysis. Gaining a greater and ultimately global perspective of your department's performance helps you **assess your** department's strengths within a truly relevant context.

94 IT Benchmarks page

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Chapter 13 SysAid ITIL Package

The *SysAid ITIL Package* is available in the full edition of SysAid and in the full edition 30-day trial. To learn more about SysAid Full edition, please follow this link: http://ilient.com/fullversion.htm . *The Free Edition does not have this package.*

What is ITIL, and how can it help me?

The Information Technology Infrastructure Library (ITIL), is an international framework of best practices for IT management and service quality, released by the UK Office of Government Commerce (formerly CCTA).

With SysAid ITIL package, you will continue to experience the same fully customizable and intuitive SysAid interface, and smooth integration with your existing SysAid modules. All ITIL modules come with pre-defined templates or basic start-up tools to help you get you up and running, so you can enjoy ITIL's wide-reaching and comprehensive range of proven management solutions in next to no time.

ITIL Problem Management

In ITIL, Problem Management refers to the process of analyzing root incident causes and proactively handling problem areas to minimize incident recurrence and business impact (as opposed to fire-fighting).

In a logical extension of the SysAid Helpdesk, SysAid's ITIL Problem Management offers a wider approach to managing SR Incidents, including the ability to group isolated SRs into related problem themes, and a knowledgebase of known errors and work-around methods. The module is designed to help you improve your IT service levels and proactively eradicate root problem causes in your organization.

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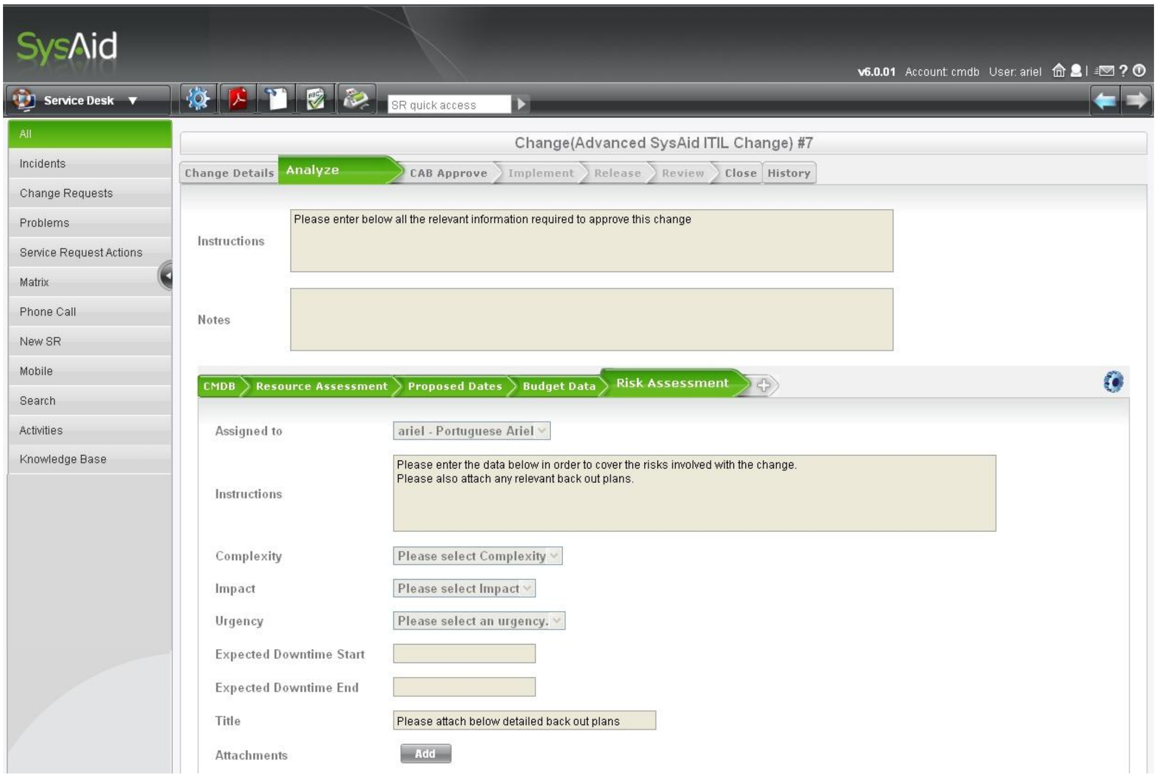
ITIL Change Management

ITIL literature also provides a best practice process framework and approval workflow for implementing effective organizational change and minimizing the risk of business exposure and service disruption.

SysAid's ITIL Change Management holds an unlimited number of change processes and allows you to customize options to suit any change scenario in your organization. Automate workflow approval processes with ITIL's proven chain of approval to help you manage and control your change activities. Apply pre-defined change templates, perform multi-level risk assessments and authorizations with a full audit trail, set secure notes, tasks and permissions for multiple stakeholders and more.

95 Change Management Process.



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The SysAid CMDB module helps your organization understand the relationships between components and track their configuration.

CMDB are the initials for Configuration Management Data Base. The CMDB is a repository of information related to all the components of an information system.

In fact, the CMDB is a data base that keeps information about all your network assets, software products and catalog items, as well as all the information about the relations between them.

The SysAid CMDB can be useful for storing information about many kinds of items.

As long as you maintain and keep your CMDB up-to-date, you will be able to enjoy the associations SysAid creates between your various configuration items.

Here are a few examples for configuration items you can set and manage in your CMDB:

- hardware (including network components where relevant)
- system software, including operating systems
- business systems - custom-built applications
- software packages
- database products
- physical databases
- environments
- configuration baselines
- Policies (Backup, Security etc.)
- configuration documentation, e.g. system and interface specifications, licenses, maintenance agreements, SLAs, decommissioning statement
- other resources e.g. Users, suppliers, contracts
- other documentation e.g. IT business processes, workflow, procedures

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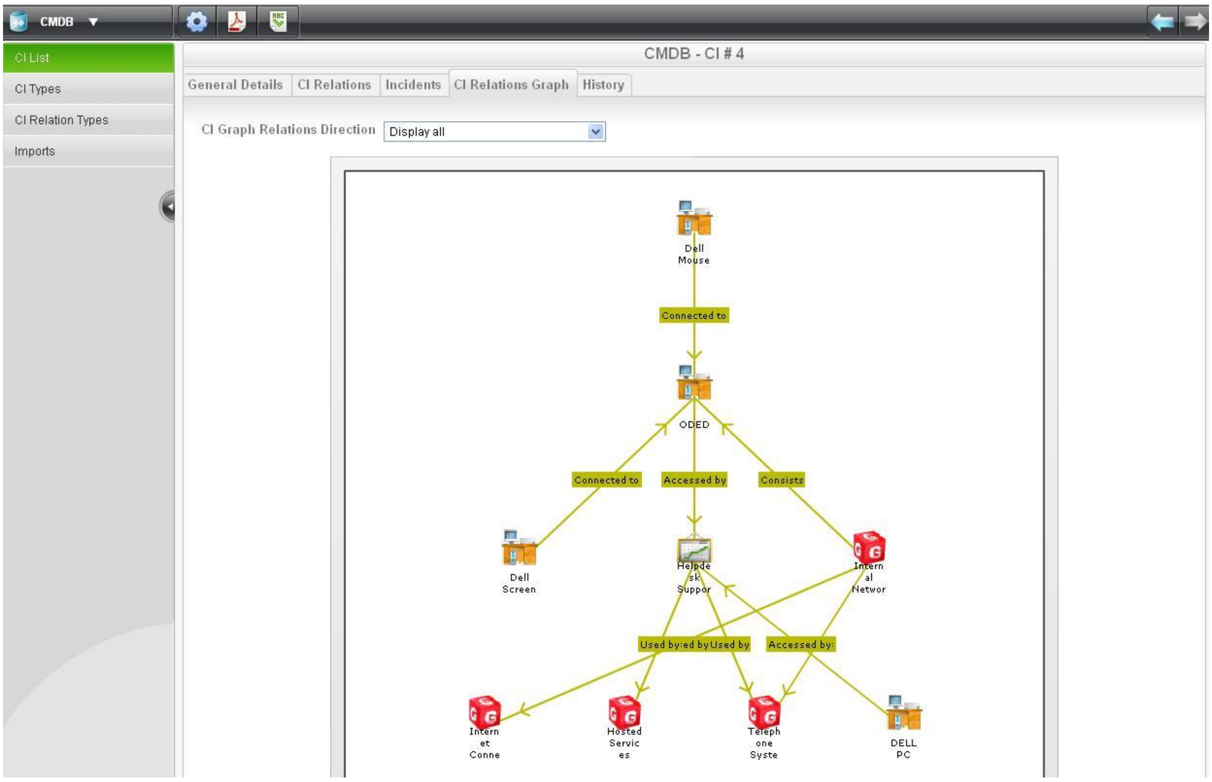
96 CI Relations Graph



SysAid CMDB can be used for additional purposes outside your IT environment for example, even a Taxi station can use SysAid CMDB to keep track of the different vehicles, drivers, destinations, garages, and other relevant components and information.

ITIL In Action

You might be applying an upgrade to the internet firewall in your organization for example. SysAid's ITIL Change Management Module offers a best-practice process framework for managing all your change-related activities, such as analyzing costs and resources, coordinating an external specialist, carrying out risk assessments and devising a roll back plan. You could even coordinate scheduled internet downtime, obtain business approval, document changes and update your Asset Management and CMDB modules - all from within SysAid.

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Another likely scenario is upgrading user workstations from Vista to Windows 7. SysAid's ITIL Change Management module automates the step-by-step workflow and chain of approval, which usually includes checking compatibility of existing hardware and software with Windows 7, ensuring proper licensing, arranging alternative workstations, acceptance testing and user training. You could also set automatic change templates for future upgrades.

In both cases, SysAid's ITIL Change Management module enhances efficiency and coordination of required change processes using ITIL best practice methodology, to ensure smooth transition with minimal impact to services and operations.

Please note: In the ITIL package the menus have been expanded to fit the package functionalities. You will notice  **Service Desk** menu link instead of **Helpdesk**. This link includes the sub-menu options: **Change Management** and **Problem Management**.

Please see the full ITIL Guide for full details
http://ilient.com/down/ITIL%20Package.pdf

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Chapter 14 SysAid Chat Module

SysAid allows administrators in the helpdesk to provide instant online support to end users via SysAid chat feature. The chat is fully integrated with your other SysAid modules, and you can improve your service level and add yet another channel of communication between administrators and end users by activating the SysAid chat.

The SysAid chat has many benefits, both for you as a helpdesk support team member, and for your end users:

- Immediate online communication available for your end users
- Initiate a chat with your end user with one click from within a Service request to assist him.
- Higher availability of the helpdesk for your end users- no need for phone calls, and full integration with the helpdesk- any chat can be connected to a service request.
- Ability to integrate the chat interface in your own website, simply by copying and pasting the provided code!
- And many more !

Please see the SysAid Chat Guide for full details on this module:
http://www.ilient.com/down/Chat_Guide.pdf

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Chapter 15 SysAid Calendar Module

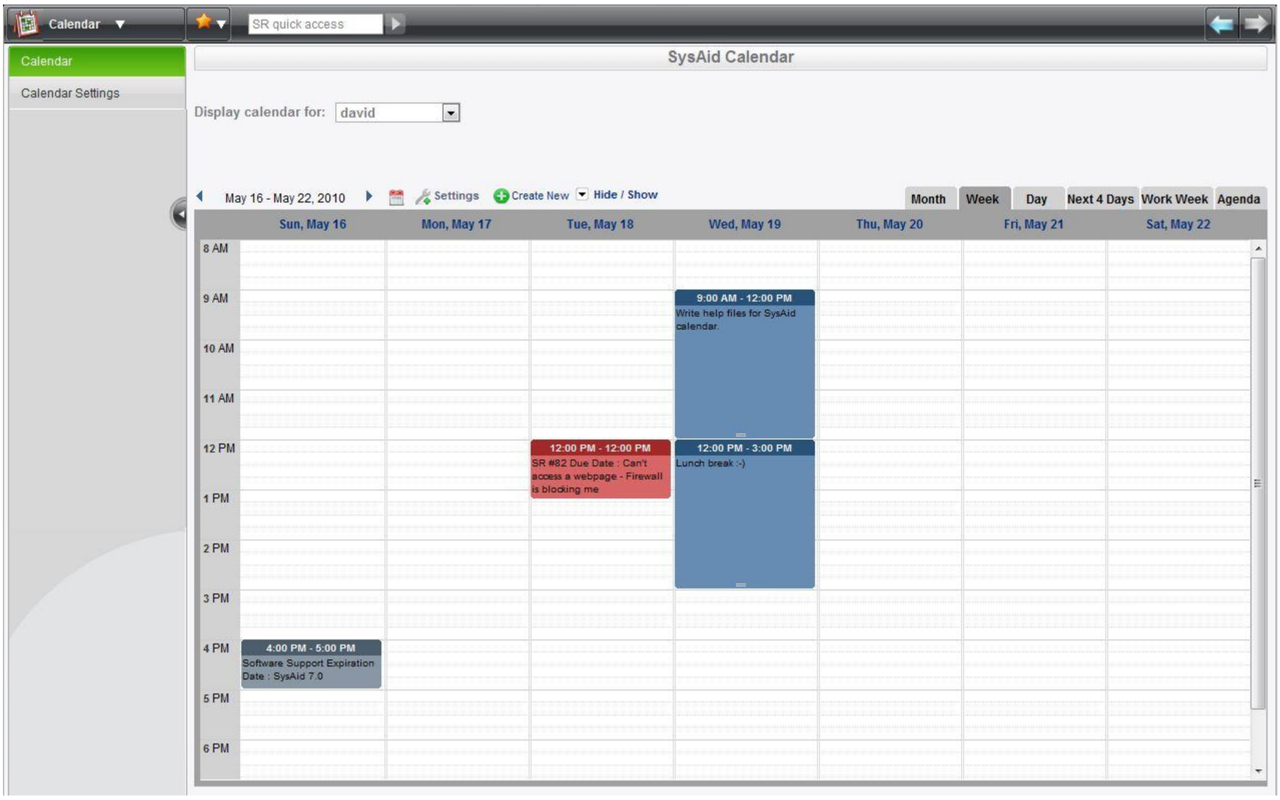
The SysAid calendar gives you one location where you can see all time relevant information within SysAid. This includes software expiration dates, service request due dates, service request activities, and more. Best of all, the SysAid calendar integrates with Microsoft Exchange allowing you to synchronize all SysAid calendar data into your Microsoft Outlook calendar.

There are three pages relevant to the SysAid Calendar:

1. The main calendar page, found at Calendar → Calendar
2. The Calendar Settings page, found at Calendar → Calendar Settings
3. The Exchange Integration page, found at Preferences → Integration → Exchange

Read below for a detailed description of each page.

Main Calendar page



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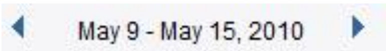
Calendar icons and their functions

Choose administrator's calendar

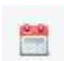
Allows you to choose the administrator whose calendar you would like to see or edit.

Previous/next date



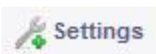
Allows you to cycle the calendar in increments specified by your view (i.e., if you are viewing a day, this will move you to the next day. If you are viewing a week, it will move you to the next week).

Select date



Allows you to pull up a calendar select page where you can easily scroll through the months and choose the exact day you want:

Change calendar layout



Pulls up the calendar settings page. Unlike the menu bar menu **Calendar --> Calendar Settings** which controls the way the calendar interacts

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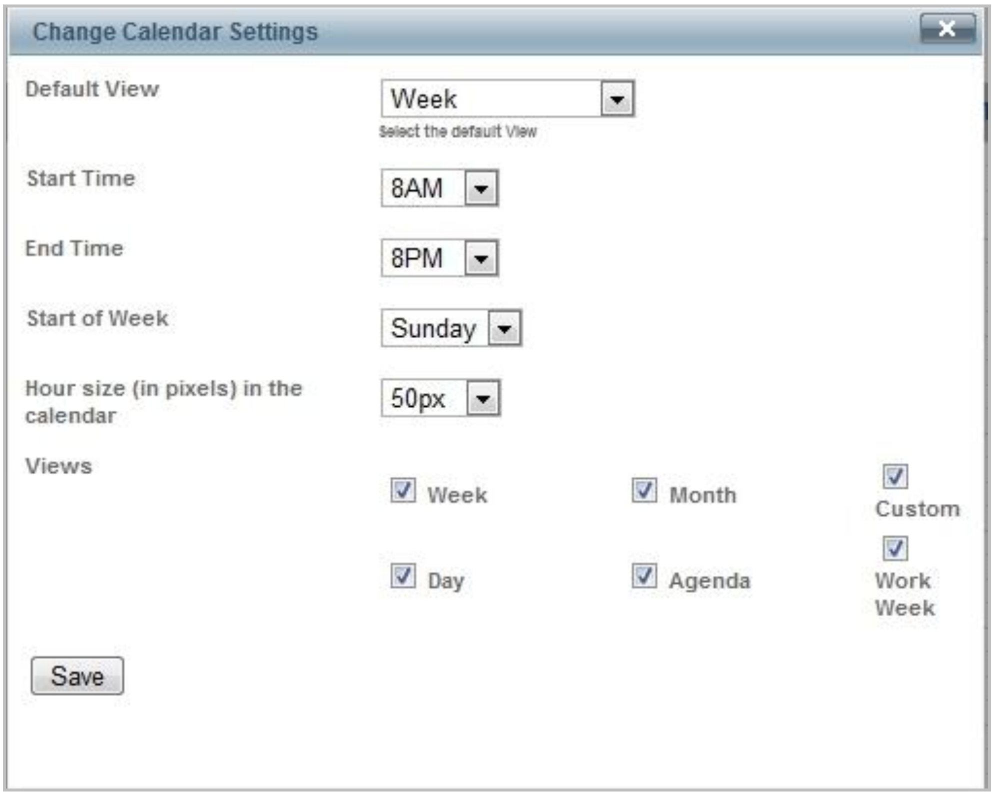
with the rest of SysAid, this settings panel controls only the visual layout of the calendar:



Default View: Determines the view that will load when you open the calendar page. If you choose **Custom # of days**, you can choose how many days will be shown.

Start/End Time: Determines the hours that will appear on the calendar. Hours before the start time or after the end time will not appear on the calendar at all.

Start of Week: Allows you to choose whether your workweek starts on Sunday or Monday.

Hour size (in pixels) in the calendar: Controls the width (visually) of the hours on the calendar.

Views: Determines which views will be shown in the top right corner of the main calendar screen (see views below).

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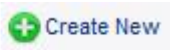
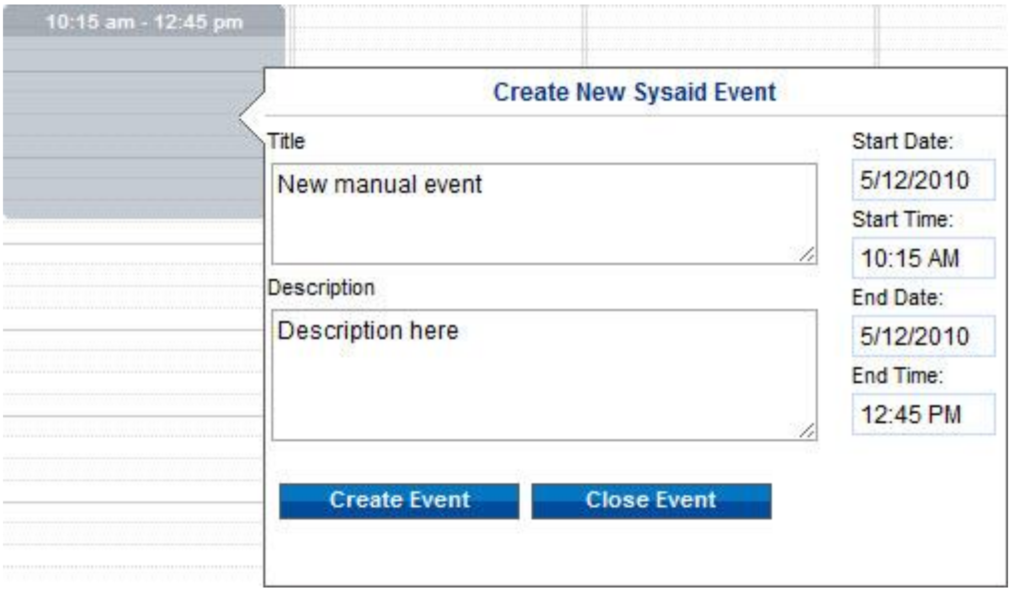
Create/Modify a SysAid event



Allows you to create a new SysAid event. A SysAid event is an event you add manually to the calendar. In addition to using the **Create** New button, you can also click and drag on the calendar itself to create a new event:



Give your event a title, description, and start and end time. Then click **Create Event**. To close the event without creating it, click **Close Event**.

To modify an event, click on the event and choose **Edit Event**. You can also click and drag on an event to move it to a different time slot. To delete an event, click on the event and choose **Delete Event**.
Please note that only manually created events can be edited or deleted from this screen.

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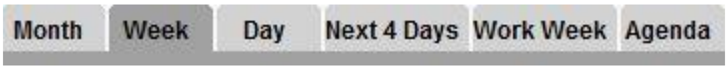
Hide/Show calendar events

Hide/Show allows you to determine which events will be shown on the calendar. A SysAid Event is any event you create manually.

Calendar views

The following are your calendar view options:



Month, Week, Day: Shows the full month, week, or day.

Next X Days: Shows a specified number of days. Choose how many days will be shown in **calendar settings** (see above).

Work Week: Shows Monday to Friday.

Agenda: Shows a list of all calendar items with their title and times. You can click **Expand Details** to see the description of each agenda item in the list, as well. By default, the next 30 days are shown. You can edit the individual dates shown on the agenda by using the icons in the top left of the screen (these icons will only appear if the agenda view is open):

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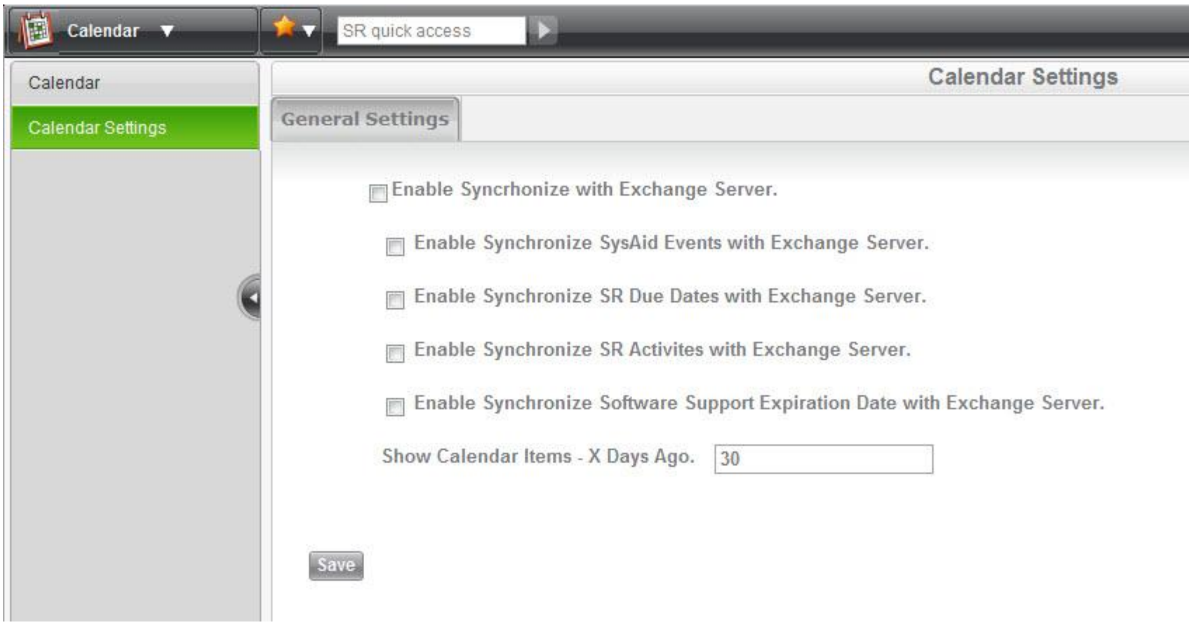
Calendar Settings page

The Calendar Settings page controls 1) which calendar items are synchronized with Exchange and 2) how far back in time the calendar will synchronize. Synchronization with Exchange means exporting calendar items from the SysAid calendar and importing them into an administrator's Outlook calendar.

Be sure to hit **Save** when you've finished making changes to this page.

IMPORTANT: All of the settings on this page are **per administrator**, so any changes made to this page will only affect the currently logged in administrator. To change system-wide Exchange settings, please go to **Preferences --> Integration --> Exchange**.



Enable Synchronization with Exchange: This controls whether or not SysAid will import calendar items into the Outlook of the currently logged in administrator.

Enable Synchronization...: You can choose individually for each type of calendar item if you would like to import to Outlook or not.

Show Calendar Items - X Days Ago: This field has two functions:

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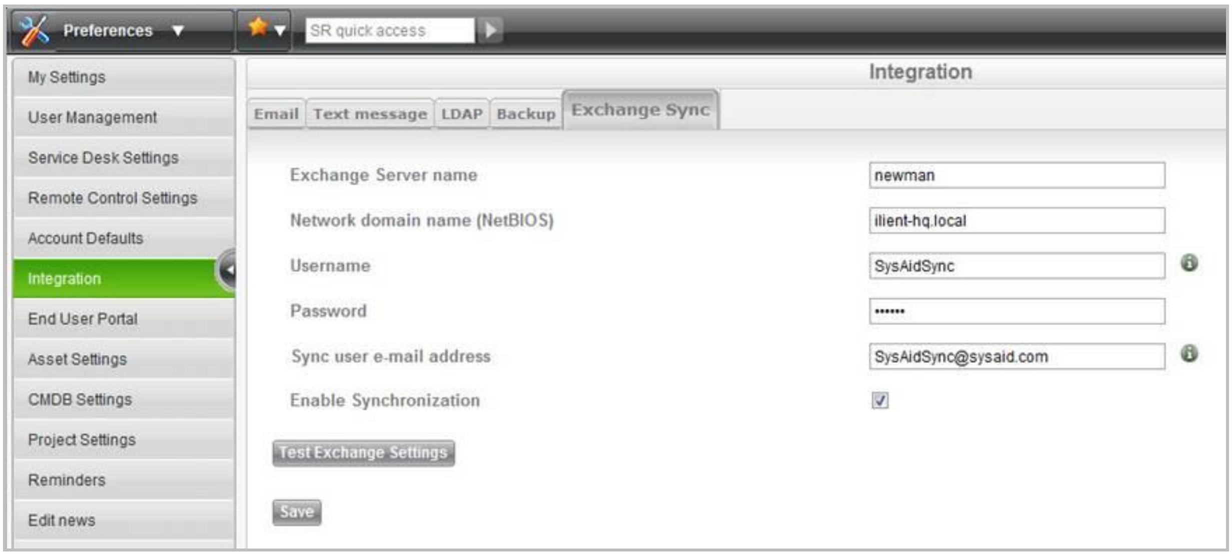
1. Determines how far back in time data will appear on the SysAid calendar.
2. Determines how far back in time calendar items will be imported into Outlook.

For example, if the number is 30, then you will not see anything older than 30 days on your SysAid calendar, and any changes to due dates, activities, etc. more than 30 days old will not be imported into your Outlook calendar.

Exchange Integration Page

This page allows you to integrate SysAid with your Exchange server for the purpose of synchronizing your SysAid calendar with your Outlook calendars. The synchronization process will export data from SysAid to your Exchange server.

To enable synchronization with Exchange, please fill out each field using the descriptions below for assistance. After you have entered the necessary information, please have each administrator go to Calendar --> Calendar Settings to complete the individual synchronization process.



Exchange Server Name: This is the name or IP address of the computer that hosts your Exchange.

Network domain name (NetBIOS): This is your network domain name.

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Username: The Exchange user whose account will be used for the synchronization. This user must have permission in Exchange to create events on employees' Outlook calendars. See below for full instructions on configuring this user.

Password: Password for the username you've used.

Sync user e-mail address: The e-mail address of the username you've used. IMPORTANT: If your company uses multiple e-mail domain formats (e.g. @sysaid.com, @internal.sysaid.com, @dev.sysaid.com), please use an e-mail address that uses the most common format (i.e. @sysaid.com). Any user on your exchange who has an e-mail address with a different e-mail domain than that of the e-mail address you use here will not be able to synchronize their SysAid calendar with Outlook.

Enable Synchronization: This will allow synchronization with Exchange for all administrators who choose to do so. To complete the synchronization with Exchange Server and import SysAid calendar data into Outlook, administrators must enable synchronization on an individual basis from Calendar --> Calendar Settings.

Test Exchange Settings: Click here and SysAid will attempt to connect to your Exchange Server using the credentials you've supplied. You will be notified if the connection is successfully established.

Configuring a user on Exchange 2003 for synchronization with SysAid

It's recommended to create a new user for SysAid integration with Exchange.

Create your Exchange synchronization user:

1. Create a new Active Directory/LDAP user for Exchange Synchronization
2. Go to Exchange System Manager --> Servers --> MailServer --> First Storage Group
3. Right click on Mailbox Store --> Properties

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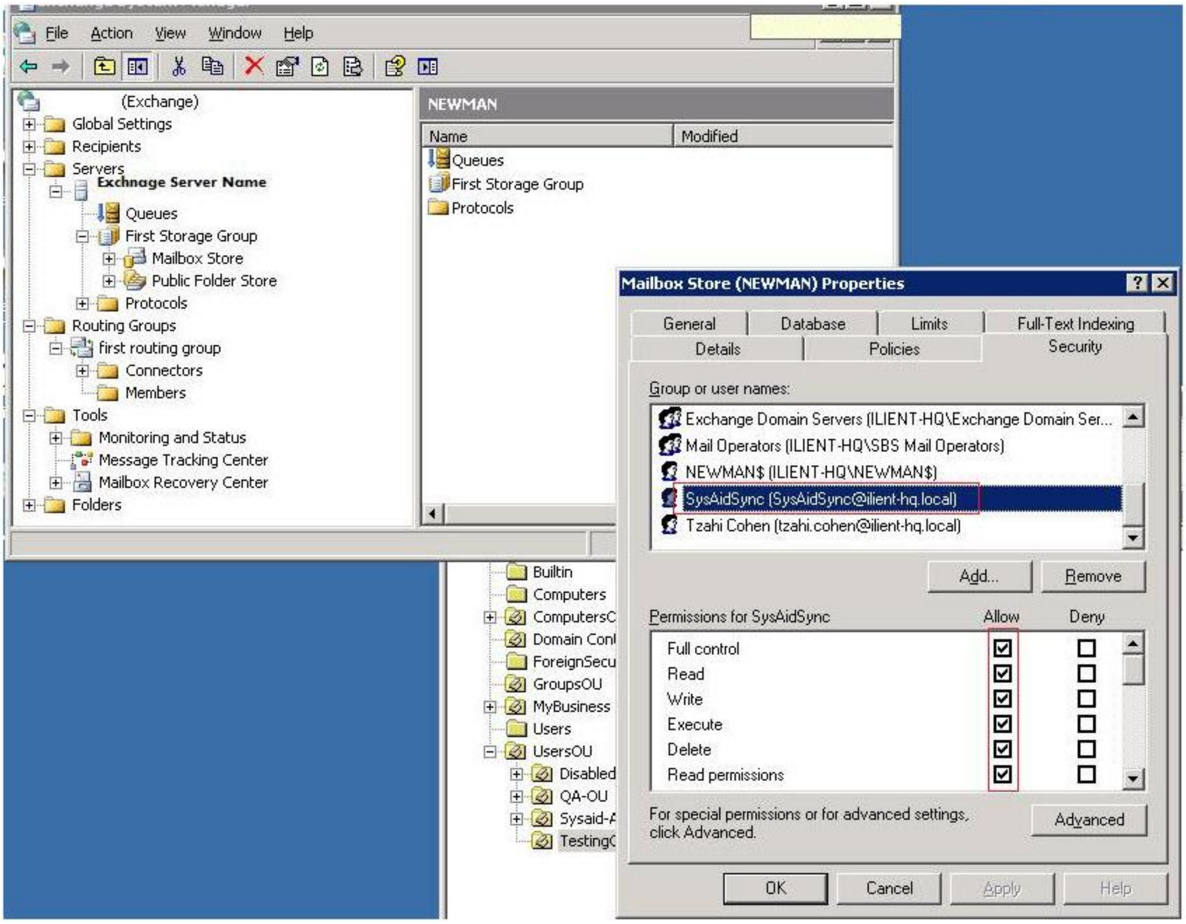
4. Select the Security tab
5. Add your new user to the list with Full control permission, as displayed below:



Configuring a user on Exchange 2007 for synchronization with SysAid

It's recommended to create a new user for SysAid integration with Exchange.

Create your Exchange synchronization user:

1. Create a new account
2. Right click on Organization Configuration
3. Add Exchange Administrator

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4. Click on **Browse** and select your new account

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5. Click the Add button

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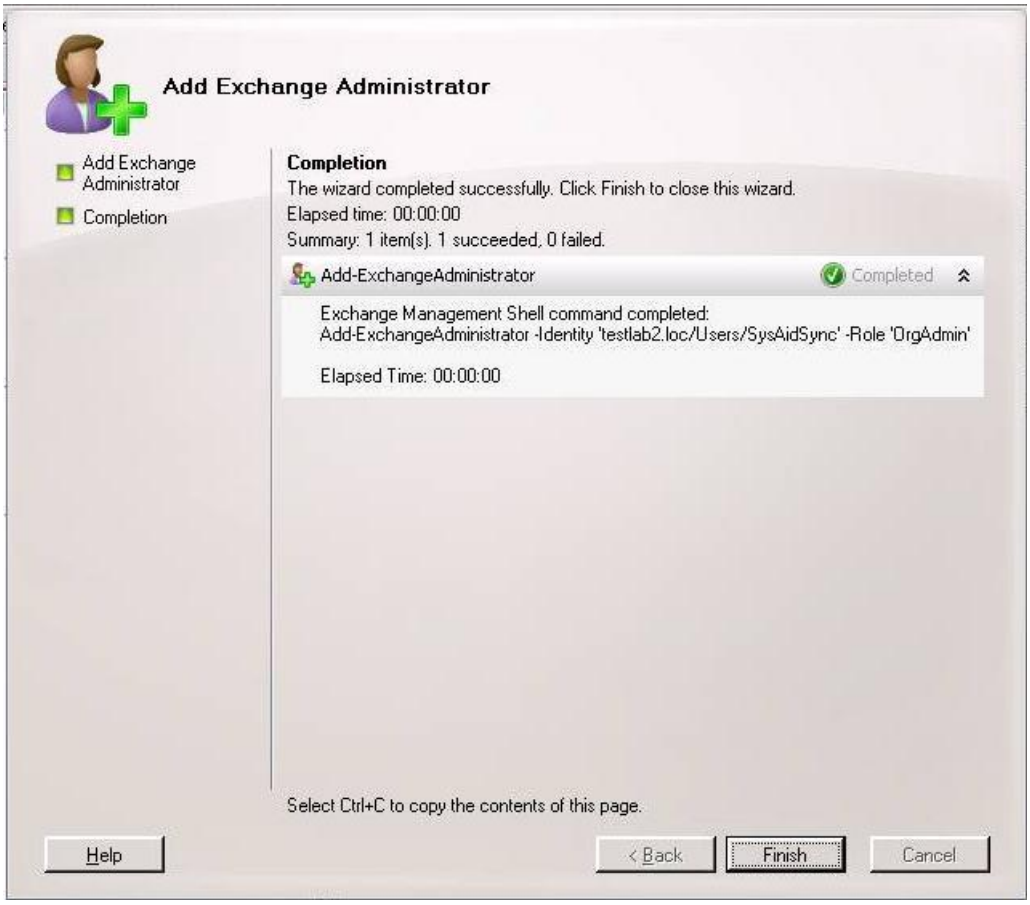

6. Click Finish to complete the process

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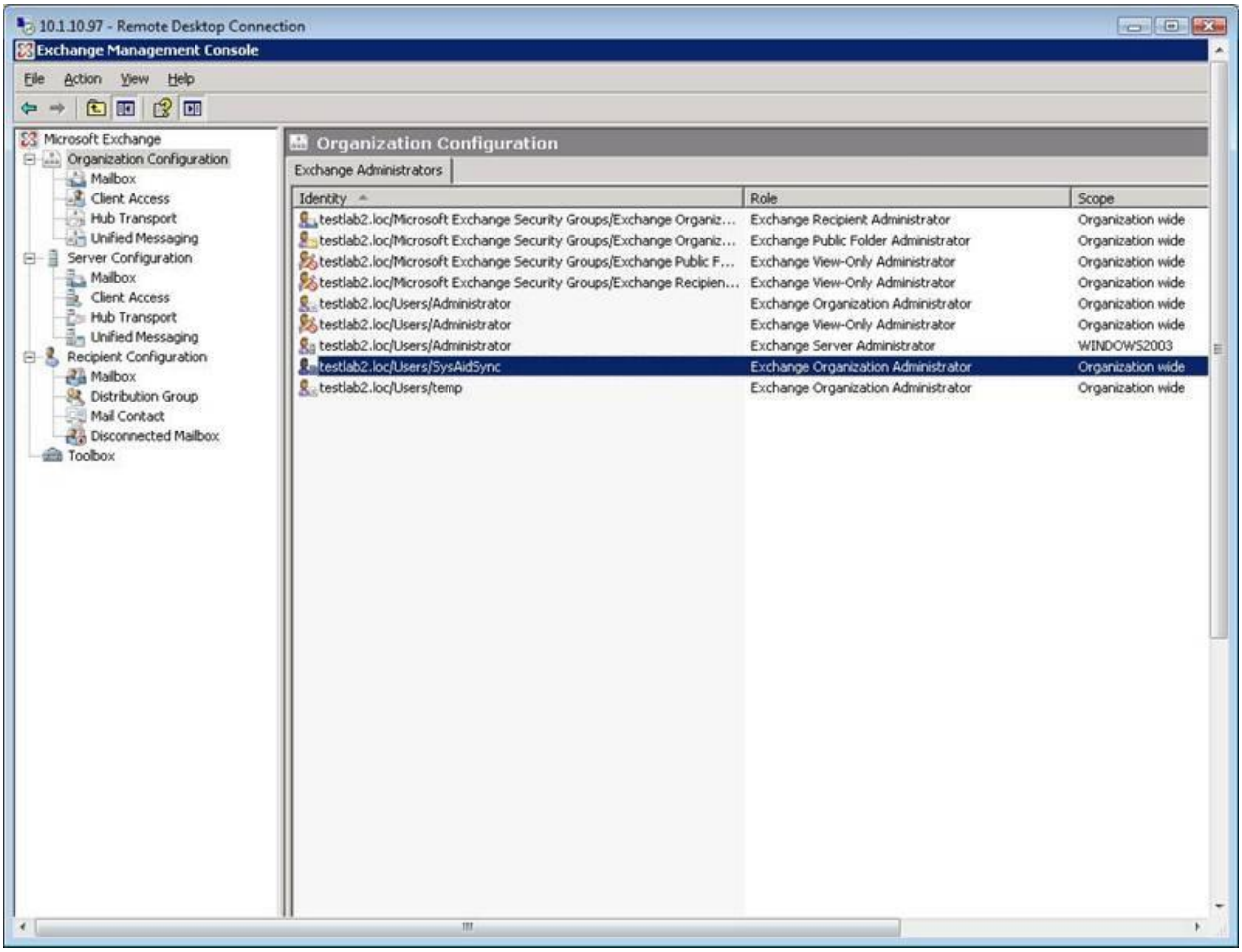

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Chapter 16 SysAid SLA/SLM Module (Enterprise Edition only)

Welcome to the SysAid Service Level Agreement (SLA) / Service Level Management (SLM) module!

Today's technology users are more demanding than ever, and for good reason. Reliance upon IT for critical company infrastructure, desire for 100% uptime, and the simple fact that almost every single person in a company has a computer means that IT staffs are responsible for an ever increasing portion of a company's well-being. Companies need to be able to depend upon their IT staffs to provide a high level of service. After all, if the e-mail server is down, the primary method of communication for nearly all workers is disrupted. If a user's keyboard breaks, they can't continue working until they receive a new one. The importance of IT staffs has led many companies to implement standards for IT availability and response time. These standards for IT performance are called Service Level Agreements.

More specifically, a Service Level Agreement is a contract that specifies the quality and speed of service that the IT team is expected to provide. For example, a company's SLA could specify that a particular server cluster must experience 100% uptime. In this case, the IT staff would spend extra time and money ensuring that this server cluster never experiences a failure. There could be another component of that SLA which says that any problem that prevents a user from doing their job, such as a keyboard or monitor failure, must be resolved within 1 hour. Sometimes a company will have different SLAs for different users, specifying that the same situation be handled differently depending upon who asks for the service. An example of this would be a VIP receiving faster response times than other workers. A company can have many different SLAs, or only one SLA that covers all aspects of their IT service operation. Regardless of how many SLAs a company has and of how they are set up, SLAs are only relevant if IT follows them. The measurement of IT conformance to SLAs within a company is called Service Level Management.

SysAid's Service Level Agreement (SLA) / Service Level Management (SLM) module allows you to define SLAs for your company within SysAid according to the agreements you follow today. SysAid SLA/SLM gives you the flexibility you need to take the complex SLAs of your IT staff and implement them in a form where they can be measured and reported on automatically. You can easily see deviance from predefined SLAs, as well as outstanding performance. Most importantly, SysAid offers you the in-depth detail you need to analyze the root cause of SLA non-conformance and to make sure that your service level is always the best.

For full instructions for using the SLA/SLM module, please see our detailed guide, or consult the online help files.

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Appendix 1
SysAid Menu Guide for Administrators

You can print off the following menu guide to help you find your way around SysAid.

Admin Portal- Home
Administrators Online
Help Desk
Last Messages
Asset Management
Recent Forum Topics
Recent Forum Notifications

Manager Portal
Dashboard
Reports
Scheduler
Design dashboard
Design Reports
Reports tree

Asset Management
My Network Assets
Asset List
Search Assets
Add Assets
Import Assets
Software products
Catalog
Supplier List
Network Discovery

Helpdesk
All
Incidents
Change Requests

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Problems
Service Request Actions
Matrix
Phone Call
New SR
Mobile
Search
Activities
Knowledgebase

Monitoring
Workstations
Servers
Workstation Templates
Server Templates
Notifications
Monitor Settings

Tasks/Projects
Projects
Tasks
Activities
Notifications

Analyzer
Analyzer File Tree

Preferences
My Settings
User Management
Service desk Settings
Remote Control Settings
Account Defaults
Customize
Integration
End User Portal
Asset Settings
CMDB Settings
Project Settings
Edit News
Event Logs
Sub Types
Change Templates
Problem Templates
Helpdesk Notifications
Downloads
About

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Appendix 2

Fields contained in the Help Desk→ New SR→ General Details Page of a Service Request

Field	Description
Category	The category a service request applies to. These are based upon the categories you set up in **Service Desk Settings → Categories.** For example: hardware, software, etc.
Sub-category	This field is positioned horizontal to the category field. It is an additional descriptive label and includes more detail of the type of service request. For example if category is hardware, the subcategory can be floppy.
Third level category	Optional further descriptive label. It should have been enabled in **General Settings**.
Title	Title of the service request, free text description. For example: Fax machine does not work.
Status	The status of the service request. A newly submitted service request will have a **New** status. The administrator can change the status once the service request has been opened, depending on the policy of your organization.
Urgency	This status is chosen by the end user when submitting the service request. It should not be confused with **Priority.**
Priority	This is determined by the SysAid administrator or by Priority rules.
Due Time	Set by Due Date Rule, the time by which the service request should be solved
Asset	The asset the service request was submitted from.
Submit user	The username of the person who submitted the service request
Request User	The user who requests assistance. This will often be the same user who submitted the request.
Assigned to	The administrator who should solve the request.
Admin Group	The admin group assigned to this particular service request.
Parent ID Child SR	Service requests can have parents and children, based on a requests relationship with one another. Say, for example, that one service request describes low memory. A second service request describes how a word processor does not load, while a third service request describes how a game will not start. The second and third service requests are linked to the first; the problems they describe stem from low memory. The administrator, therefore, can input the ID of the first service request as their parent. When the status of a parent service request changes, the status of the children also changes, automatically.
Include in Knowledgebase	A copy of the service request can be stored in the Knowledgebase.
Actions	Certain actions an administrator can perform: Send Message, Search Knowledgebase.

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Appendix 3

Items contained in the Preferences→ Service Desk Settings→ General Settings page

Item	Description
□ Email responsible when a service request changes	This option will send an email notification to the individual assigned to it if any changes are made to the service request. In each service request one can see in *General Details*, the individual assigned in the *Assigned To* field.
Email assigned group members when a service request changes	This option will send an email notification to the administrator group assigned to it if any changes are made to the service request. In each service request one can see in *General Details*, the administrator group assigned in the *Admin Group* field.
New service request default priority	For all new service requests you can set the priority level so that all incoming service requests will be displayed. If you want to retain the Urgency setting set by the end-user, you should select Priority=Urgency.
SMS notification on new service requests with priority >= Send SMS to username	This option is useful for the most urgent service requests. You should set the priority level. Once you have set the priority level all service requests that meet the set priority generates a notification to your SMS. This will only work if you have set up: SMS gateway account, or if your company supports an email2sms service. In the field Send SMS to - add a username. The SMS number will be retrieved from the user account information located in **My Settings**. If you would like to send an SMS using an email account add "email:" before the SMS number (e.g. email:23423423@your_cellphone_provider.com) in **My Settings**. Note: You should insert your cellular phone number in **My Settings** page (Preferences → My Settings → SMS), plus go to Preferences→Integration→SMS.
Email notification on new service requests with priority >= Send email to username Browse	This is the **default setting** for sending notification to one administrator upon receipt of all new service requests. Enter the username of the administrator. If you want a notification to be sent for all service requests change the priority to Low. If you set up an administrator to receive notification in **Routing**, then that will take precedence over this option. If you use **Routing**, for those categories not assigned under **Routing**, the setup here will take effect and send notification to the administrator.

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Item	Description
	Add the username of the administrator here.
Send instant messages to administrators on new service requests	You can send an instant message to report a new service request. This will appear in a popup screen in SysAid. The popup screen can be clicked on in order to go directly to the service request.
Email notifications to end users when -Status changes -Assign to changes -Notes are added	Here you can set up to notify the end user via email when one or all of the criteria are fulfilled. The content of the email is set out in **Customized Notification** (**Go to Preferences → Customize**).
-Enable third level categories	A service request has a category (such as “hardware” or “software”) and a subcategory (such as “keyboard” or “anti-virus”). Here, you can choose to enable third level (sub-sub) categories. To add third level categories in the **Categories** tab Go to **(Preferences → Service Desk Settings**).
-Reroute service requests, based on routing rules, when the details of the request change.	If a service request changes (Company, user group, category, administrator or administrator group), SysAid will reroute and follow the new routing rule. If the checkbox is disabled, service requests will be routed only once, when received.
-Enable incoming (POP3, IMAP or MAPI) email integration POP3 Server: Email address: User: Password: Create SR from new emails using the following parameters: Please select a category Please select a sub-category Please select urgency.	If you enable email integration, input the necessary data into the appropriate fields. The email received will open as a service request. SysAid extracts email from an email box given with POP3, IMAP or MAPI capability. SysAid uses a predefined set of parameters to open the service request. The parameters are: Category, subcategory, and urgency; meaning a service request opened by email integration will always have the same category, subcategory and the same urgency. SysAid can identify the end user by his/her email address. Email integration gives you more flexibility when connecting with the IT department. The POP3 IMAP or MAPI email given should not be used for anything other than internal purposes. SysAid only supports POP3 IMAP or MAPI. The email address is the one you shall give to end users who want to send SR via this option. The service requests arriving by email will be assigned the following category and sub-category. The urgency that all service requests arriving by emails will be given is set here.
Send replies to assigned admin(s) and change status to:	When a service request is replied, you will be sent a notification and the status of that request in SysAid will be changed. Select the status from the dropdown menu.

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Item	Description
Ignore emails with subject matter to (regular expression):	For those emails that have in their subject matter: [insert regular expression] for example: (Undelivered Mail Returned) all such emails will be ignored.
Forward ignored emails to:	Insert the username of the individual who should receive the ignored emails.

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Appendix 4

Fields available for customization of forms in SysAid various modules.

Service Request Form

Available fields for Customization	Additional Remarks
Activities	Present the Activities related to the service request
Attachments	Present the attachments to the service requests.
CC	Present the carbon copies for the service request.
CI Attachment	Present the CIs attached to the service request.
CI Relations	Present the relations to relevant CIs.
CI Relations Graph	Present the graph of relations between CIs related to the service request.
Close Time	Present the time in which the service request was closed.
Company	Present the company from which the service request was sent.
Department	Present the department from which the service request was sent.
Description	Present any text in the description field in the service requests.
Escalation	Present the escalations of the service request
Follow-up Actual Date	Present the actual date of the follow-up on the service request.
Follow-up Planned Date	Present the planned date for the follow-up on the service request.
Follow-up Text	Present the text for the follow-up on the service request.
Follow-up User	Present the name of the administrator who sends the follow-ups for the service request.
History	Present any text in the history field of the service request.
Links	Present all the links of the service request
Location	Present the location of the sender of the service request.
Messages	Present the messages sent regarding the service request.
Modify Time	Present the time in which the service request was last modified.
Notes	Present the notes of the service request
Project	Present the projects related to the service request

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Request Time	Present the time in which the request was sent
Screen Capture	Present the screen capture attached to the service request.
Solution	Present the solution of the service request.
Source	Present the source of the service request
Resolution	Present the resolution of the service request.
Success Rating	
Task	Present the tasks related to the service request.
SR Custom Date 1, 2	Preset a special date field you have customized.
SR Custom Integer 1, 2	Present a special integer field you have customized.
SR Custom List 1, 2	Present a special list you have customized.
SR Custom Notes	Present notes you have customized.
SR Custom Text 1, 2	Present a special text field you have customized
Quick Name	
Category	
Title	
Status	
Urgency	
Priority	
Due Date	
Asset	
Submit User	
Request User	
Assigned to	
Admin Group	
Parent ID	
Child Service Request	
Knowledgebase	
Actions	
Screen Capture	
Re- opened	The number of times a service request has been reopened, that is, moved from a closed status to an open status.¤
Re-Assigned	The number of unique administrators that the service request has been assigned to throughout the service request life cycle.
Links to Other Items	This field easily allows you to see if an incident is linked to a change, problem, task, etc.
Responsible Admin	Enterprise edition only: this field allows you to choose from a

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	popup screen the name of the administrator responsible for the Service Request. In your Service desk Settings under Preferences, you can choose to e-mail the responsible admin when a Service Request changes. Note that this field appears also under HelpDeskSettings.jsp

Asset Form

Available Fields for Customization	Additional Remarks
Activity Log	Present the log of all the activities related to the asset
Attachments	Present the attachments to the asset
BIOS Type	
Building	Present the building in which the asset is located
CI Attachment	Present the CIs attached to the asset
CI Relations	Present the CI Relations of the asset
CI Relations Graph	Present the CI Relations graph for the asset
CPU Count	Present the CPU count for the asset
CPU Model	Present the CPU model for the asset
CPU Speed	Present the CPU speed for the asset
CPU Vendor	Present the CPU vendor of the asset
Child Assets	Present child- assets
Company Serial	Present the serial number of the company of the asset
Cubic	Present the cubic in which the asset is located
Department	Present the department that uses the asset
Display Adapter	
Display Memory	Display the memory of the asset
Display Resolution	
External Serial	Present the external serial number of the asset
Floor	Present the floor in which the asset is located
Hardware	Present the hardware of the asset
Helpdesk	
History	Present the history of the asset
Last Maintenance	Present the last maintenance date for the asset
Links	Present the links related to the asset
Location	Present the location of the asset

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Monitor	Present the monitor of this asset
Monitor Serial	Present the serial number of the monitor of this asset
Mouse	Present the mouse of this asset
OS Serial	Present the serial number of the OS of the asset
Operating System Type	Present the type of OS of the asset
Operating System Version	Present the version of OS of the asset
Parent Asset	Present the parent asset
Printers	present the printers related to the asset
Purchase cost	present the purchase cost of the asset
Purchase date	Present the purchase date of the asset
RC	Present the remote control sessions on the asset
Registry Values	Present the registry value of the asset
Service Pack	Present the service pack of the asset
Software	Present the software installed on the asset
Source	Present the source of the asset
Supplier	Present the supplier of the asset
Support Provider	Present the support provider for the asset
Warranty Expiration	Present the warranty expiration for the asset
Vpro	
SNMP Custom Text 1-20	
Asset Custom date 1, 2	Present a special date you have customized
Asset Custom Integer 1, 2	Present a special integer field you have customized
Asset Custom List 1, 2	Present a special list field you have customized
Asset Custom Notes	Present customized notes
Asset Custom Text 1, 2	Present a special text field you have customized.
Last Access Time	
SNMP Parameters	
SysAid Agent Version	
Update Time	
Name	
Type	
Group	
Company	
Catalog Number	
Description	
Owner	
Users	
Serial	

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Model	
Manufacturer	
Operating System	
CPU	
Memory	
Display	
Storage	
Network	
IP Address	Note that you can see the MAC addresses of the asset, view export and search by MAC address.

Edit End user Properties

Available Fields for Customization	Additional Remarks
Active service request	Present the active service requests
Attachments	Present the attachments of the end user
CI Attachment	Present the CIs attached to the end user
CI Relations	Present the CIs related to the end user
CI Relations Graph	Present a graph of related CIs
Car License	Present the car license number of the end user
Cubicle	Present the cubicle of the end user
Date Input Style	
Department	Present the department to which the end user belongs
Disabled	Show whether the end user is enabled or disabled
Encoding	
Expiration Date	Present the expiration date of the end user license
Floor	Present the floor on which the end user is located.
Font Size	
Helpdesk	
History	Present the history of the end user
Is Supervisor	Show whether the end user is a supervisor or not
Language	Present the language of the end user
Links	Present relevant links for the end user
Location	Present where the end user is located
Notes	Present the notes of the end user
Service Requests	Present the service requests of the end user

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Time Zone	Present the time zone of the end user
User Custom Date 1, 2	Present a special field you have created for dates
User Custom Integer 1, 2	Present a special integer field you have created
User Custom List 1, 2	Present a special list field you have created
User Custom Notes	Present your customized notes field
User Custom Text 1, 2	Present a special text field you have created
Building	
User Name	
Password	
Confirm Password	
First Name	
Last Name	
Email	
Text Message	
Phone	
Cellular Phone	
Company	

Supplier

Available Fields for Customization	Additional Remarks
Name	
Phone	
Fax	
Address	
Email	
Account	
Account Number	Present the account number of the supplier
Attachments	Present attachments of the supplier
Contact Name	Present the name of the contact person
Version	
ID	
Mobile	Present the mobile phone number of the supplier
Phone 2	Present another telephone number of the supplier
Supplier List 1, 2	Present a special list field you have created
Supplier Custom Date 1,2	Present a special date field you have created
Custom Integer 1, 2	Present a special integer field you have created

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Custom Notes	Present a special notes field you have created
Custom Text 1, 2	Present a special text field you have created

Catalog item

Available Fields for Customization	Additional Remarks
Attachments	Present attachments to the catalog item
CI Attachment	Present CIs attached to the catalog item
Catalog Custom Date 1, 2	Present a special date field you have created
History	Present the history of the item
Links	Present the links of the catalog item
Supplier	
Account	
Model	
Manufacturer	
Name	
Catalog Number	
Notes	

Project

Available Fields for Customization	Additional Remarks
Account	
Assigned Group	Present the group of administrators to whom the project is assigned
Tasks	
Company	Present the company for which the project is performed
Description	Present the description of the project
Gantt	Present the Gantt chart of the project
History	Present the history of the project
Links	Present the links for the project
Notes	Present the notes of the project
Notification Title	Present the titles of the notifications sent regarding the

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	project
Progress	Present the progress of the project
Project Custom Date 1,2	Present a special dates field you have created
Project Custom Integer 1,2	Present a special integer field you have created
Project Custom List 1,2	Present a special list field you have created
Project Custom Notes	Present a special notes field you have created
Project Custom Text 1, 2	Present a special text field you have created
Project Level	Present the level of the project
Raw Estimation	
Version	
ID #	
Category	
Title	
Manager	
Status	
Start Time	
End Time	
Requested Group	

Task

Available Fields for Customization	Additional Remarks
Activities	Present the activities of the task
Attachments	Present the attachments of the task
Description	Presents a description of the task
History	Presents the history of the task
Links	Presents the links added to the task
Notes	Presents the notes of the task
Task Notification	Presents the notification related to the task
Users	Presents the users who are involved in the task
Task Custom Date 1, 2	Present a special dates field you have created
Task Custom Integer 1, 2	Present a special integer field you have created
Task Custom List 1, 2	Present a special list field you have created
Task Custom Notes	Present a special notes field you have created
task Custom Text 1,2	Present a special text field you have created
Title	
Project	

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Category
Status
Start Time
End Time
Estimation
Progress

CI

Available Fields for Customization	Additional Remarks
Attachments	Present attachments to the CI
CI Relations	Present CI relations
CI Relations Graph	Present the CI relations graph
Company	Present the company the CI is related to
History	Present the history of the CI
Incidents	Present the incidents of the CI
Links	Present the links of the CI
Users	Present the users connected to the CI
CI Custom Date 1-50	Present up to 50 special date fields you have created
CI Custom Integer 1-50	Present up to 50 special integer fields you have created
CI Custom List 1-50	Present up to 50 special list fields you have created
CI Custom Long Text 1-50	Present up to 50 special long text fields you have created
CI Custom Text 1-50	Present up to 50 special text fields you have created
CI Name	
Serial Number	
CI Type	
Status	
Priority	
Location	
Owner	
Supplier	
Supply Date	
Accept Date	
Import Items	
Notes	

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Service Request Action items

Available Fields for Customization	Additional Remarks
Account	
Admin Group	
Approved	
Budgeted	
CAB meeting reference	
CI Attachment	
Company	
Completed Time	
Complexity	
Department To Charge	
Duration in hours	
Enabled Time	
Expected Downtime End	
Expected Downtime Start	
Hardware Costs	
Impact	
Installation Costs	
Internal Manpower In Hours	
Location	
Maintenance Costs	
Modify Time	
Notes	
Completed Percentage	
Policy Compliance	
Priority	
Project	
Proposed delivery date	
Proposed version	
Re-opened	
Request time	
Resources required in days	
Software Costs	
Status	
Submit user	

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Task
Title
Total Costs
Total Expected Downtime In Hours
Training Costs
Urgency
User Acceptance
Service Request ID
Service Request Title
Assigned to
Instructions
Due Date

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Further Guides and Reading

The following guides are also available from www.ilient.com.

Guide 1: Installing the SysAid Server
http://www.ilient.com/down/installation_guide.PDF

Guide 2 : Freeware Installation Guide
http://www.ilient.com/down/freeware_installation.PDF

Guide 3: Getting Started Guide
http://www.ilient.com/down/getting_started.PDF

Guide 4: Administrator Tools
http://ilient.com/down/Administrator_Tools.PDF

Guide 5: The Deployment Tool
http://www.ilient.com/down/deployment.PDF

Guide 6: The SysAid Agent
http://www.ilient.com/down/agent.PDF

Guide 7: End User's Manual
http://www.ilient.com/down/end_user_manual.PDF

Guide 8: Administrator's Guide
http://www.ilient.com/down/administrators_guide.PDF

Guide 9: The Database
http://lw6.ilient.com/dede5t/database_guide.pdf

Guide 10: Manager Dashboard Guide
http://ilient.com/down/Manager%20Dashboard%20Guide6.pdf

Guide 11: Project and Task Guide
http://ilient.com/down/Project%20and%20Task%20Management.pdf

Guide 12: Monitoring Guide
http://ilient.com/down/monitoring6.pdf

Guide 13: CMDB Guide
http://ilient.com/down/CMDB6.pdf

Guide 14: ITIL Package Guide
http://ilient.com/down/ITIL%20Package.pdf

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Guide 15: Chat Guide
http://ilient.com/down/Chat_Guide.pdf

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