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About SolarWinds MSP

SolarWinds MSP is the global leader in remote monitoring and management software for managed service providers and IT departments. SolarWinds MSP's award-winning MSP N-central platform and complementary toolsets, backed by best-in-class business and technical services, are proven to reduce IT support costs, improve network performance and increase productivity through the proactive monitoring, management and optimization of IP-enabled devices and IT infrastructure. SolarWinds MSP is 100% channel-friendly and maintains operations in North America, the U.K., the Netherlands and Australia.
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<td>Unsecured and secured ports for login</td>
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</tr>
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<td>No redirect to HTTPS</td>
<td>284</td>
</tr>
<tr>
<td>URL ports (optional)</td>
<td>284</td>
</tr>
<tr>
<td>Tomcat server port</td>
<td>284</td>
</tr>
<tr>
<td>Mail notification port</td>
<td>284</td>
</tr>
<tr>
<td>Java home location</td>
<td>284</td>
</tr>
<tr>
<td>IP address</td>
<td>285</td>
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<tr>
<td>Privileged networks</td>
<td>285</td>
</tr>
<tr>
<td>Keystore settings (for SSL connections)</td>
<td>285</td>
</tr>
<tr>
<td>Memory allocation</td>
<td>286</td>
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<tr>
<td>Database connections</td>
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</tr>
<tr>
<td>Java command line options</td>
<td>286</td>
</tr>
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<td>JVM arguments</td>
<td>287</td>
</tr>
<tr>
<td>Connect an iPhone to a standard or hosted installation</td>
<td>302</td>
</tr>
<tr>
<td>Connect to a standard installation</td>
<td>302</td>
</tr>
<tr>
<td>Connect to a hosted installation</td>
<td>303</td>
</tr>
</tbody>
</table>
Introduction

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

All help desk processes are managed through the web console. After you set up the application, you can configure Help Desk Manager to perform specific tasks. These tasks include routing tickets to a specific help desk technician or work group and creating new tickets from email requests or alert messages from a supported monitoring application.

You can run Help Desk Manager on the following operating systems and platforms:

- Microsoft Windows Server
- Red Hat Enterprise Linux
- Fedora
- CentOS

Key features

Help Desk Manager provides the following features for managing your enterprise or managed service provider (MSP) help desk operations:

- Modern Authentication for Office 365 e-mail accounts
- Ticket checklists
- Request type archive
- Parent/Child service relationships
- Automated ticket processing
- IT asset management and inventory

Modern Authentication for Office 365 e-mail accounts

You can set up a new incoming e-mail account with Modern Authentication to access Microsoft Exchange Web Services (EWS) and your Office 365 e-mail. This authentication method uses Multi-factor Authentication (MFA), Open Authentication (OAuth) 2.0, and conditional access policies (such as Azure Active Directory Conditional Access) to access your incoming e-mail account. When the configuration is completed, all e-mail correspondence transmitted between Office 365 and Help Desk Manager is secure from unauthorized users.
Ticket checklists

You can create a ticket checklist to ensure that all ticket tasks are completed before a ticket is closed. Techs can create an ad-hoc checklist from within a ticket or an administrator can create checklists templates to automate your ticketing process.

Request type archive

You can archive a request type in the Help Desk Manager Administrator Console. This process archives the request type and all associated tickets so they are hidden from clients and techs.

Parent/child service relationships

You can link multiple service requests to one parent ticket to address a repeated issue or task (such as on-boarding a new employee or tracking your IT projects). You can also pass notes, attachments, and custom fields between parent and child tickets to share data to relevant tasks.

Automated ticketing processing

You can generate help desk tickets manually in the user interface or automatically by emails from any third-party monitoring tool. You can also create tasks to link a ticket automatically to an existing ticket that triggers an action rule.

Architecture

The following illustration provides a high-level view of HDM in a stand-alone installation. In this example, HDM is installed on a dedicated server with your choice of an embedded PostgreSQL database or an external database such as MySQL or Microsoft SQL Server.
Ticket processing

Help Desk Manager initiates and manages your help desk processes through the Web Console, email, SMS, and built-in procedures. After you configure Help Desk Manager, it automatically routes tickets to the proper technician and updates your customer.

Help Desk Manager accepts email ticket requests and opens a ticket based on the information in the email. You can also update and close tickets using email. If a repair requires spare parts, Help Desk Manager orders the required parts.

Each customer can access a Web console dedicated to their help desk needs. Customers can access their help desk features through a Web portal, but they cannot access information from other help desk customers.

The following illustration provides an overview of Help Desk Manager processes at a high level.
Evaluate the application

For 14 days after you install your evaluation version of Help Desk Manager, you have unlimited tech seats. If you do not purchase a license after 14 days, Help Desk Manager automatically switches to a one-tech license. All tech accounts other than the initial admin account become inactive, and the Assets and Processes tabs in Setup are disabled.

Purchasing and entering a license reactivates the deactivated accounts. After you purchase a license in the Customer Portal and receive an activation key code, enter the code in the Setup > General > License > License Settings window.

Convert your unlicensed Help Desk Manager version to a licensed version retains all of your existing Help Desk Manager settings or files. No additional configuration or installation is required.
System requirements

This section contains the system requirements for Help Desk Manager. For additional information about requirements, see the latest Help Desk Manager Release Notes.

Server hardware and software requirements

Hardware

<table>
<thead>
<tr>
<th>HARDWARE</th>
<th>REQUIREMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPU</td>
<td>64-bit Dual Core 3.0 GHz or faster</td>
</tr>
<tr>
<td>RAM</td>
<td>4 GB (up to 10 technicians)</td>
</tr>
<tr>
<td></td>
<td>3 GB (more than 20 technicians) plus 1 GB for every 10 additional technicians</td>
</tr>
<tr>
<td></td>
<td>See Server sizing requirements for details.</td>
</tr>
<tr>
<td>Hard Drive Space</td>
<td>20 GB</td>
</tr>
<tr>
<td>Application Ports</td>
<td>8443 (default)</td>
</tr>
<tr>
<td></td>
<td>20293 (PostgreSQL)</td>
</tr>
</tbody>
</table>

Operating system

⚠️ Deprecation notice: Although you can install Help Desk Manager on systems running Microsoft Windows Server 2012 and 2012 R2 (64-bit), these versions are deprecated and will not be supported on future Help Desk Manager releases. SolarWinds strongly recommends that you upgrade to Windows Server 2016 or later at your earliest convenience.

<table>
<thead>
<tr>
<th>OPERATING SYSTEM PLATFORM</th>
<th>SUPPORTED VERSIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Windows Server</td>
<td>Windows Server 2012 R2 (64-bit)</td>
</tr>
<tr>
<td></td>
<td>Windows Server 2016</td>
</tr>
<tr>
<td></td>
<td>Windows Server 2019</td>
</tr>
<tr>
<td>Microsoft Windows (Trial evaluation only)</td>
<td>Windows 7 (64-bit)</td>
</tr>
<tr>
<td></td>
<td>Windows 8.1 (64-bit)</td>
</tr>
<tr>
<td></td>
<td>Windows 10 (64-bit)</td>
</tr>
<tr>
<td>macOS</td>
<td>10.13 (Sierra)</td>
</tr>
<tr>
<td></td>
<td>10.14 (High Sierra)</td>
</tr>
</tbody>
</table>
### OPERATING SYSTEM PLATFORMS SUPPORTED VERSIONS

<table>
<thead>
<tr>
<th>Operating System Platform</th>
<th>Supported Versions</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.15.x (Catalina)</td>
<td></td>
</tr>
<tr>
<td>Red Hat Enterprise Linux</td>
<td>RHEL 6.5 (64-bit)</td>
</tr>
<tr>
<td>(RHEL)</td>
<td>RHEL 7.0 (64-bit)</td>
</tr>
<tr>
<td>CentOS</td>
<td>CentOS 6.5 (64-bit)</td>
</tr>
<tr>
<td></td>
<td>CentOS 7.0 (64-bit)</td>
</tr>
<tr>
<td>Fedora</td>
<td>Fedora 24 (64-bit)</td>
</tr>
<tr>
<td></td>
<td>Fedora 25 (64-bit)</td>
</tr>
<tr>
<td>Java Platform</td>
<td>Open Java Development Kit</td>
</tr>
<tr>
<td></td>
<td>(OpenJDK) 14</td>
</tr>
</tbody>
</table>

### Web browser

Due to frequent web browser updates, check the SolarWinds support website for the latest information about compatibility issues between these web browsers and the latest version of Help Desk Manager.

<table>
<thead>
<tr>
<th>Type</th>
<th>Supported Versions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google Chrome</td>
<td>Latest version</td>
</tr>
<tr>
<td>Mozilla Firefox</td>
<td>Latest version</td>
</tr>
<tr>
<td>Microsoft Internet Explorer (IE)</td>
<td>IE 11</td>
</tr>
<tr>
<td>Apple Safari</td>
<td>Safari 10</td>
</tr>
<tr>
<td></td>
<td>Safari 11</td>
</tr>
<tr>
<td>Microsoft Edge</td>
<td>Edge 38 and later</td>
</tr>
</tbody>
</table>

**Server sizing requirements**

Use the following sections to determine the requirements for your Help Desk Manager deployment size.

**Deployments with fewer than 20 techs**

If your deployment will support 20 tech sessions or fewer, you can run Help Desk Manager on a system with:
- A supported operating system
- A 32-bit Java Virtual Machine (JVM)
- 4 GB RAM (up to 3.7GB for the tech sessions, JVM support, operating system, and any additional services you need to run on the system)

This configuration supports 10 - 20 tech sessions with no onboard memory issues.

To adjust the maximum memory setting, edit the `MAXIMUM_MEMORY` option in the `<HelpDeskManager>/conf/whd.conf` file.

**Deployments with more than 20 techs**

If your deployment will support more than 20 tech sessions, SolarWinds recommends installing Help Desk Manager on a system running:

- A supported operating system
- A 64-bit JVM
- 3 GB RAM for 20 tech sessions plus 1 GB RAM for each additional 10 tech sessions

**Configuring the JVM**

To increase the max heap memory on a JVM, edit the `MAXIMUM_MEMORY` option in the `<HelpDeskManager>/conf/whd.conf` file.

For other operating systems, install your own JVM and then update the `JAVA_HOME` option in the `<HelpDeskManager>/conf/whd.conf` file to point to your Java installation.

**Database requirements**

Help Desk Manager uses an embedded PostgreSQL database as its standard database. The following table lists the supported databases.

**Software**

<table>
<thead>
<tr>
<th>DATABASE</th>
<th>SUPPORTED VERSIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>PostgreSQL</td>
<td>PostgreSQL 9.2</td>
</tr>
<tr>
<td></td>
<td>PostgreSQL 9.3.2</td>
</tr>
<tr>
<td></td>
<td>PostgreSQL 9.4</td>
</tr>
<tr>
<td></td>
<td>PostgreSQL 9.6</td>
</tr>
<tr>
<td>MySQL</td>
<td>MySQL 5.7</td>
</tr>
<tr>
<td>Microsoft SQL Server</td>
<td>SQL Server 2008 R2 SP3</td>
</tr>
<tr>
<td></td>
<td>SQL Server 2012 SP2</td>
</tr>
<tr>
<td></td>
<td>SQL Server 2014</td>
</tr>
</tbody>
</table>
DATABASE SUPPORTED VERSIONS

<table>
<thead>
<tr>
<th>Database</th>
<th>SQL Server 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>SQL Server 2017</td>
</tr>
</tbody>
</table>

For optimal external database performance, run Help Desk Manager and a supported external database on separate servers.

Hardware
The following table lists the minimum software and hardware requirements for a server hosting MySQL and SQL Server.

<table>
<thead>
<tr>
<th>PRODUCT</th>
<th>REQUIREMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPU speed</td>
<td>64-bit Dual Core 3.0 GHz or better</td>
</tr>
<tr>
<td>Hard drive space</td>
<td>20 GB</td>
</tr>
<tr>
<td>Memory</td>
<td>3 GB plus 1 GB for every additional 10 techs</td>
</tr>
</tbody>
</table>

Discovery connector requirements
The following table lists the supported discovery connectors used for asset discovery.

<table>
<thead>
<tr>
<th>DISCOVERY CONNECTOR</th>
<th>SUPPORTED VERSIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apple Remote Desktop</td>
<td>Remote Desktop 3.8</td>
</tr>
<tr>
<td>Casper</td>
<td>Casper 9.96</td>
</tr>
<tr>
<td>Lansweeper</td>
<td>Lansweeper 6.0.100.75</td>
</tr>
<tr>
<td>Microsoft System Center Configuration Manager (SCCM)</td>
<td>SCCM 1511 (64-bit)</td>
</tr>
</tbody>
</table>

Web server requirements
The following table lists the supported web server for Help Desk Manager.

<table>
<thead>
<tr>
<th>PRODUCT</th>
<th>VERSION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apache Tomcat</td>
<td>9.0.37</td>
</tr>
</tbody>
</table>
LDAP requirements

<table>
<thead>
<tr>
<th>PRODUCT</th>
<th>SUPPORTED VERSIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Active Directory 1</td>
<td>Active Directory 2012</td>
</tr>
<tr>
<td></td>
<td>Active Directory 2012 R2</td>
</tr>
<tr>
<td>Open Directory</td>
<td>Open Directory 4</td>
</tr>
<tr>
<td>OpenLDAP</td>
<td>OpenLDAP 2.4</td>
</tr>
<tr>
<td></td>
<td>OpenLDAP 2.4.42</td>
</tr>
</tbody>
</table>

1 Only Active Directory is addressed in this guide. For other LDAP systems, see the Help Desk Manager Installation Guide.

Mail server requirements

<table>
<thead>
<tr>
<th>MAIL SERVER</th>
<th>SUPPORTED VERSIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Exchange Server</td>
<td>Exchange Server 2010</td>
</tr>
<tr>
<td></td>
<td>Exchange Server 2013 CU7</td>
</tr>
<tr>
<td></td>
<td>Exchange Server 2016</td>
</tr>
<tr>
<td></td>
<td>Office 365</td>
</tr>
</tbody>
</table>

Mobile client requirements

The following table lists the supported client operating systems for the SolarWinds mobile admin software.

<table>
<thead>
<tr>
<th>PLATFORM</th>
<th>SUPPORTED OPERATING SYSTEMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apple iOS®</td>
<td>iOS 10 and later</td>
</tr>
</tbody>
</table>

Supported protocols

- IMAP
- POP3
- SMTP

Port requirements

Help Desk Manager provides communication ports for the following resources:
Help Desk Manager interfaces

The following table lists the Help Desk Manager ports for secure and non-secure interface traffic.

<table>
<thead>
<tr>
<th>PORT</th>
<th>TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>135</td>
<td>TCP</td>
<td>Asset Discovery using Windows Management Instrumentation (WMI)</td>
</tr>
<tr>
<td>389</td>
<td>TCP</td>
<td>Non-secure traffic from the Help Desk Manager server to a designated server (usually a domain controller) for use with the Directory Service tool (LDAP and Active Directory)</td>
</tr>
<tr>
<td>443</td>
<td>TCP</td>
<td>Secure traffic from the Help Desk Manager Console</td>
</tr>
<tr>
<td>8081</td>
<td>TCP</td>
<td>Non-secure traffic from the Help Desk Manager Console (Windows and Linux)</td>
</tr>
<tr>
<td>8443</td>
<td>TCP</td>
<td>Secure traffic from the Help Desk Manager Administrator Console (Windows and Linux)</td>
</tr>
<tr>
<td>61616</td>
<td>TCP</td>
<td>Help Desk Manager Discovery engine (JMS queue port)</td>
</tr>
</tbody>
</table>

Databases

The following table lists the Help Desk Manager ports for external and embedded database communications.

<table>
<thead>
<tr>
<th>PORT</th>
<th>TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| 1433 | TCP  | Communications with a Microsoft Microsoft SQL external database, including:  
  - Microsoft SQL Server  
  - Microsoft Systems Management Server  
  - Microsoft System Center Configuration Manager (SCCM) |
| 3306 | TCP  | External MySQL database |
| 5432 | TCP  | Communication with an External PostgreSQL database |
| 20293| TCP  | Communications with an embedded PostgreSQL database |

Email

The following table lists the Help Desk Manager ports for email traffic.
<table>
<thead>
<tr>
<th>PORT</th>
<th>TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>25</td>
<td>TCP</td>
<td>Traffic from the Help Desk Manager server to your email server for automated email notifications</td>
</tr>
<tr>
<td>80</td>
<td>TCP</td>
<td>Non-secure connection with Microsoft Exchange Web Services (EWS)</td>
</tr>
<tr>
<td>110</td>
<td>TCP</td>
<td>Non-secure traffic with the POP3 mail server</td>
</tr>
<tr>
<td>143</td>
<td>TCP</td>
<td>Non-secure traffic with the Internet Message Access Protocol (IMAP) mail server</td>
</tr>
<tr>
<td>443</td>
<td>TCP</td>
<td>Secure traffic with EWS</td>
</tr>
<tr>
<td>993</td>
<td>TCP</td>
<td>Secure traffic with the IMAP mail server</td>
</tr>
<tr>
<td>995</td>
<td>TCP</td>
<td>Secure traffic with the POP3 mail server</td>
</tr>
</tbody>
</table>

**LDAP and Active Directory**

The following table lists the Help Desk Manager ports for Lightweight Directory Access Protocol / Active Directory (LDAP / AD).

<table>
<thead>
<tr>
<th>PORT</th>
<th>TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>389</td>
<td>TCP</td>
<td>Traffic from the Help Desk Manager server to a designated server (usually a domain controller) for use with the Directory Service tool (LDAP and Active Directory)</td>
</tr>
<tr>
<td>636</td>
<td>TCP</td>
<td>Secure traffic from the Help Desk Manager server to a designated server (usually a domain controller) for use with the Directory Service tool (LDAP and Active Directory)</td>
</tr>
</tbody>
</table>

**Firewall port requirements for data traffic**

Firewalls between any two points of communication must have the requisite ports open to inbound or outbound traffic according to the relative direction of the communication traffic.

**Port requirements for Help Desk Manager**

Help Desk Manager provides communication ports for the following resources:

- Help Desk Manager Interfaces
- Databases
- Emails
- LDAP/AD
Help Desk Manager interfaces

The following table lists the Help Desk Manager ports for secure and non-secure interface traffic.

<table>
<thead>
<tr>
<th>PORT</th>
<th>TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>80</td>
<td>TCP</td>
<td>Non-secure traffic from the Help Desk Manager Console (VA)</td>
</tr>
<tr>
<td>135</td>
<td>TCP</td>
<td>Asset Discovery using Windows Management Instrumentation (WMI)</td>
</tr>
<tr>
<td>389</td>
<td>TCP</td>
<td>Non-secure traffic from the Help Desk Manager server to a designated server (usually a domain controller) for use with the Directory Service tool (LDAP and Active Directory)</td>
</tr>
<tr>
<td>443</td>
<td>TCP</td>
<td>Secure traffic from the Help Desk Manager Console</td>
</tr>
<tr>
<td>8081</td>
<td>TCP</td>
<td>Non-secure traffic from the Help Desk Manager Console (Windows and Linux)</td>
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<tr>
<td>8443</td>
<td>TCP</td>
<td>Secure traffic from the Help Desk Manager Administrator Console (Windows and Linux)</td>
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Databases

The following table lists the Help Desk Manager ports for external and embedded database communications.

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<th>TYPE</th>
<th>DESCRIPTION</th>
</tr>
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  - Microsoft Systems Management Server  
  - Microsoft System Center Configuration Manager (SCCM)  
  - SolarWinds Network Configuration Manager (NCM)  
  - SolarWinds Network Performance Monitor (NCM)  
  - SolarWinds Server and Application Monitor (SAM) |
| 3306 | TCP  | External MySQL database |
| 5432 | TCP  | Communication with an External PostgreSQL database |
| 20293| TCP  | Communications with an embedded PostgreSQL database |

Email

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<th>TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>25</td>
<td>TCP</td>
<td>Traffic from the Help Desk Manager server to your email server for automated email notifications</td>
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<tr>
<td>80</td>
<td>TCP</td>
<td>Non-secure connection with Microsoft Exchange Web Services (EWS)</td>
</tr>
<tr>
<td>110</td>
<td>TCP</td>
<td>Non-secure traffic with the POP3 mail server</td>
</tr>
<tr>
<td>143</td>
<td>TCP</td>
<td>Non-secure traffic with the Internet Message Access Protocol (IMAP) mail server</td>
</tr>
<tr>
<td>443</td>
<td>TCP</td>
<td>Secure traffic with EWS</td>
</tr>
<tr>
<td>993</td>
<td>TCP</td>
<td>Secure traffic with the IMAP mail server</td>
</tr>
<tr>
<td>995</td>
<td>TCP</td>
<td>Secure traffic with the POP3 mail server</td>
</tr>
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</table>

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<th>TYPE</th>
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<td>389</td>
<td>TCP</td>
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<td>TCP</td>
<td>Secure traffic from the Help Desk Manager server to a designated server (usually a domain controller) for use with the Directory Service tool (LDAP and Active Directory)</td>
</tr>
</tbody>
</table>

**Configure firewalls for data traffic**

Firewalls between any two points of communication must have the requisite ports open to inbound or outbound traffic according to the relative direction of the communication traffic.
Get started

The first time you use Help Desk Manager, the Getting Started wizard opens and assists you with setting up your Help Desk Manager deployment. When completed, you can log in to Help Desk Manager and apply an activation key.

Set up the database

Before you install HDM, decide whether to use an embedded or external database. HDM comes standard with an embedded PostgreSQL database.

Set up an embedded database

The embedded PostgreSQL database is ideal for small to medium installations, and is configured as part of the setup in the HDM Getting Started Wizard.

Set up an external database

If you use an external database, SolarWinds MSP recommends using Microsoft SQL Server. Be sure to install and configure SQL Server before you install HDM.

You can install SQL Server and HDM on the same server or separate servers. HDM can also use a new SQL database instance on an existing SQL Server.

Database datatypes

The following table provides a reference for mapping data types from other databases to PostgreSQL (and to each other).

<table>
<thead>
<tr>
<th>HDM</th>
<th>POSTGRESQL</th>
<th>MySQL</th>
<th>SQL SERVER</th>
</tr>
</thead>
<tbody>
<tr>
<td>PK</td>
<td>int4</td>
<td>INT</td>
<td>int</td>
</tr>
<tr>
<td>currency</td>
<td>numeric</td>
<td>DECIMAL</td>
<td>money</td>
</tr>
<tr>
<td>datetime</td>
<td>timestampz</td>
<td>DATETIME</td>
<td>datetime</td>
</tr>
<tr>
<td>integer</td>
<td>int4</td>
<td>INT</td>
<td>int</td>
</tr>
<tr>
<td>pk</td>
<td>bytea</td>
<td>BLOB</td>
<td>varbinary(max)</td>
</tr>
<tr>
<td>data</td>
<td>bytea</td>
<td>LONGBLOB</td>
<td>varbinary(max)</td>
</tr>
<tr>
<td>text</td>
<td>text</td>
<td>TEXT</td>
<td>nvarchar(max)</td>
</tr>
<tr>
<td>varchar</td>
<td>varchar</td>
<td>VARCHAR</td>
<td>nvarchar</td>
</tr>
</tbody>
</table>
Use an embedded PostgreSQL database

When the Help Desk Manager Getting Started Wizard prompts you to select a database, select Use Embedded PostgreSQL database (recommended) and click Next.

Create a custom SQL database and account

1. During the installation procedure, select Use Custom SQL database (advanced).
2. Click the Database Type drop-down menu and select the appropriate database.
3. Enter the appropriate information in the remaining fields.
4. Click Test to test the database connection.
   - If Help Desk Manager connects with the external database, click Next.
   - If Help Desk Manager cannot connect with the external database, check your settings and rerun the test.

If you do not have an account on the selected database:

1. Select Create database and user account if necessary.
2. Enter the database admin account user name.
3. Enter the database admin account password.
4. Click Create.

See Configure the Microsoft SQL Server and MySQL Databases to set up your external database to work with Help Desk Manager.

Create the default admin account

The default admin account is a local super user account used to:

- Log in to Help Desk Manager for the first time and configure the application.
- Access all Help Desk Manager settings and accounts.

Administrators with a default admin account can create all user accounts, including additional admin accounts. The default admin account includes tech account privileges, so you can create and process tickets with tech privileges. Techs can have either Tech or Tech Admin account privileges.

1. In the Getting Started wizard, navigate to the Admin Account panel.
2. Complete the fields as required, and click Next.

After you complete the Getting Started Wizard and create your Admin account, the Getting Started Wizard is no longer accessible. To access Help Desk Manager, log in through the Help Desk Manager login page.

If you try to access the Getting Started Wizard, an error message displays with a link to the login page, as shown below.

The default admin account is the only Help Desk Manager account that can view and use the blue Switch to Client account toolbar button.
When you create the default admin account, the Getting Started Wizard automatically links the client account. Additional admin and tech accounts must be specifically configured to link to a client account.

Create a request type in the Getting Started Wizard

When you install Help Desk Manager, in the last step of the Getting Started wizard you can add request types or edit preconfigured request types. This step of the wizard is optional. You might find it easier to add request types in the Tickets panel after Help Desk Manager is configured.

In most cases, SolarWinds MSP recommends that you bypass this step in the wizard and take time to plan the request types you need.

To bypass this step, click Finish.
Set up the application

This section describes how to set up and configure Help Desk Manager after you install the application. See the following sections for details.

See Setup overview for procedure descriptions, setup menu options, and terms used in Help Desk Manager.

Setup overview

The following steps provide a basic overview of how to set up Help Desk Manager in a typical help desk deployment.

See the System Requirements for the latest hardware and software requirements.

Some procedures may require you to start and stop Help Desk Manager Services.

1. (Optional) Migrate Help Desk Manager to a new server that includes additional resources to support the application, and then relink the application to your existing database.

2. Configure the General settings, such as logging in and activating your Help Desk Manager license, configuring general user interface options, setting up your authentication method, customizing your database connection, setting up the time zone and local work hours for your employees, setting up the calendar options, and configuring the look and feel of the Help Desk Manager console.

   Activate your license before your 30-day evaluation period ends. When your evaluation license expires, your single admin or tech account remains active, but all advanced features are disabled.

3. Prepare the Help Desk Manager database, such as Microsoft SQL Server, MySQL, and Apache Tomcat.

4. Set up your email accounts, such as setting up your inbound and outbound email accounts, applying email templates, and applying tags in email templates.

   If your in-bound email account is linked to a Microsoft Office 365 account, configure an incoming email account for Office 365.

5. Set up your tickets, such as defining request types, status types, priority types and alert triggers, custom ticket fields and tasks.

6. Define your techs in your help desk deployment, such as adding each tech, defining your tech groups, and setting up the tech's permissions.

7. Define your clients, such as setting up client administration roles, defining client custom fields, importing Active Directory or LDAP directory connections, and importing clients.

8. Define your assets, including your Device import and permission options, asset types, Device custom fields, manufacturer and model information, purchase order custom fields, and import asset data.

9. Define your parts and billing processes for applying parts and billing options, creating invoicing options, defining rates and terms, and defining custom fields for your parts.
10. **Set up the dashboard** with pie chart, bar graph, and text widgets that display ticket statistical data.  
11. (Optional) **Add a custom logo** to personalize the user interface for your organization.

### Setup menu options

When you click Setup in the toolbar, the Setup screen displays with a left column menu. Below are descriptions of each menu option.

<table>
<thead>
<tr>
<th><strong>Menu Option</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>Defines licensing information, authentication methods, interface appearance, time and Customer, logging, and information about the Help Desk Manager software.</td>
</tr>
<tr>
<td>Email</td>
<td>Defines email options, incoming and outgoing email accounts, and email templates.</td>
</tr>
<tr>
<td>Locations</td>
<td>Defines companies, locations and rooms location groups and assigned locations, techs, and group managers, location custom fields, departments and department groups, and department custom fields.</td>
</tr>
<tr>
<td>Tickets</td>
<td>Defines the Help Desk Manager user interface and the fields and information they contain, request types (such as facilities and hardware), status types (such as Open and Pending), priority types and alerts (such as Urgent, High, and Low), custom ticket fields, and task names.</td>
</tr>
<tr>
<td>Clients</td>
<td>Defines the client options, client administration roles, client custom fields, and Active Directory / LDAP connections.</td>
</tr>
<tr>
<td>Techs</td>
<td>Defines your account information (My Account), all techs configured to use Help Desk Manager and their assigned tech groups, and tech permissions.</td>
</tr>
<tr>
<td>Assets</td>
<td>Defines asset types, manufacturers and models, vendors, asset and purchase order custom fields. From the Assets settings, you can run and preschedule asset discoveries to scan connected networks for the assets in your corporate network.</td>
</tr>
<tr>
<td>Processes</td>
<td>Defines how Help Desk Manager defines, stores, and applies action rules. Action rules apply custom actions triggered by events you define, such as ticket routing.</td>
</tr>
<tr>
<td>Surveys</td>
<td>Defines your survey options and associated text to set up surveys and gather feedback from your client users.</td>
</tr>
<tr>
<td>Parts and billing</td>
<td>Defines your parts and billing options; custom fields; inventory alerts; invoicing options; and billing rates, terms, and tax rates.</td>
</tr>
</tbody>
</table>
| Data Import     | Defines how Help Desk Manager imports data for Customers, clients, Devices,
<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>purchase orders, tickets, and more.</td>
</tr>
</tbody>
</table>

**Help Desk Manager terms**

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

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

- **Assets**: Client-owned hardware and software tracked by properties such as location, type, and status.

**Migrate Help Desk Manager to a new server**

Migrating Help Desk Manager to a different server requires you to move the current Help Desk Manager installation settings files to the new server and relink the application to your database.

You can move Help Desk Manager to another server in the following configurations:

- Both servers are running identical operating systems
- Original server is running Windows Server and the target server is running Linux or macOS
- Original server is running Linux or macOS and the target server is running Windows Server

**Access a command line**

Most of the commands in this article must be executed in a command line. The following table describes how to open a command line in your operating system.

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows Server</td>
<td>1. Open a Run dialog box.</td>
</tr>
<tr>
<td></td>
<td>2. Enter <code>cmd</code> to open a command line with administrator privileges.</td>
</tr>
<tr>
<td><strong>Operating System</strong></td>
<td><strong>Steps</strong></td>
</tr>
<tr>
<td>------------------------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td>macOS</td>
<td>1. Click Applications &gt; Utilities.</td>
</tr>
<tr>
<td></td>
<td>2. Double-click Open in Terminal. This option may vary with your distribution.</td>
</tr>
<tr>
<td>Linux (RPM installation)</td>
<td>1. Open the graphical user interface.</td>
</tr>
<tr>
<td></td>
<td>2. Click Applications &gt; System.</td>
</tr>
<tr>
<td></td>
<td>3. Right click Desktop and click Open in Terminal.</td>
</tr>
</tbody>
</table>

**Help Desk Manager directory**

In the following procedures, `<HelpDeskManager>` represents the Help Desk Manager home folder. The default home folders for the supported operating systems are listed below.

If you installed Help Desk Manager in a non-standard directory, replace the following paths with the correct locations in all commands.

<table>
<thead>
<tr>
<th><strong>Operating System</strong></th>
<th><strong>Path</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows Server</td>
<td><code>\Program Files\N-able Technologies\Help Desk Manager</code></td>
</tr>
<tr>
<td>Linux</td>
<td><code>/usr/local/n-abletechnologies/helpdeskmanager</code></td>
</tr>
</tbody>
</table>

**Both servers are running identical operating systems**

1. Ensure that both servers are running identical 32-bit or 64-bit operating systems.
2. Log in to Help Desk Manager as an administrator.
3. Click Setup > General > License.
4. Click the padlock next to your license.
5. In the License Settings screen, click Deactivate to deactivate your license.
7. **Stop Help Desk Manager** on the original server.
8. Navigate to the `<HelpDeskManager>` directory.

<table>
<thead>
<tr>
<th><strong>Operating System</strong></th>
<th><strong>Path</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows Server</td>
<td><code>\Program Files\N-able Technologies\Help Desk Manager</code></td>
</tr>
<tr>
<td>Linux</td>
<td><code>/user/local/n-abletechnologies/helpdeskmanager</code></td>
</tr>
</tbody>
</table>

9. **Back up the `<HelpDeskManager>\conf directory to a safe location.**
10. If the original server is running Windows Server, **copy the \bin\wrapper\conf directory to a safe location.**
11. Install the same Help Desk Manager version on the target server.
12. On the target server, initialize Help Desk Manager using the Getting Started Wizard. When prompted, select Embedded database (the default is PostgreSQL).

13. On the target server, stop Help Desk Manager and the PostgreSQL service.

14. On the target server, rename the \Program Files\N-able Technologies\Help Desk Manager\PGSQL9 directory to OLD_PGSQL9.

15. Move the directory to a different location.

16. Copy the program files in the <HelpDeskManager>\PGSQL9 directory from the old Help Desk Manager installation to \Program Files\N-able Technologies Help Desk Manager\ on the target server.

17. On the target server, navigate to the conf directory.
   a. Windows Server: <HelpDeskManager>\bin\wrapper\conf
   b. Linux and macOS: <HelpDeskManager>/conf

18. Copy the conf directory files from the original server to the same location on the target server.

<table>
<thead>
<tr>
<th>OPERATING SYSTEM</th>
<th>FILES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows Server</td>
<td>keystore.jks</td>
</tr>
<tr>
<td></td>
<td>whd.conf</td>
</tr>
<tr>
<td></td>
<td>labels\CustomLabels*.properties</td>
</tr>
<tr>
<td></td>
<td>bin\wrapper\conf\wrapper_template.conf</td>
</tr>
<tr>
<td>Linux</td>
<td>keystore.jks</td>
</tr>
</tbody>
</table>

19. Start Help Desk Manager on the target server.

   If the target server domain host name is identical to the original server domain host name, you are finished.

   If the target server domain host name is different from the original server domain host name, perform the following steps:
   a. Log in to Help Desk Manager as an administrator.
   b. Click Setup > General > Options.
   c. In the Server DNS Name field, enter the new server DNS name.
   d. Click Save.

20. Log in to the Help Desk Manager Administrator Console as an administrator.

21. Click Setup > General > License.

22. Reactive your license.

Original server is running Windows Server and the target server is running Linux or macOS

1. Ensure that both servers are running identical 32-bit or 64-bit operating systems.
2. Log in to Help Desk Manager as an administrator.
3. Click Setup > General > License.
4. Click the padlock next to your license.
5. In the License Settings screen, click Deactivate to deactivate your license.
7. **Start Help Desk Manager** on the original server.
8. Back up the following directories to a safe location:
   - `<HelpDeskManager>/conf`
   - `hdm\bin\wrapper\conf`
9. Install an identical Help Desk Manager version on the target server.
10. Initialize Help Desk Manager using the Getting Started Wizard. When prompted, select the default PostgreSQL embedded database.
11. Log in to Help Desk Manager using admin/admin credentials.
12. Click Setup > General > Database.
13. Point Help Desk Manager to your original database.
   - If the original server connected to an embedded PostgreSQL database, use port 20293.
14. **Start Help Desk Manager** on the target server.
15. Navigate to the **conf** directory on the target server.

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows Server</td>
<td><code>&lt;HelpDeskManager&gt;\bin\wrapper\conf</code></td>
</tr>
<tr>
<td>Linux</td>
<td><code>&lt;HelpDeskManager&gt;/conf</code></td>
</tr>
</tbody>
</table>

16. Copy the following files from the original server to the same location on the target server:
   - keystore.jks
   - whd.conf
   - labels/CustomLabels*.*properties
17. If you use custom VM arguments in the `\bin\wrapper\conf\wrapper_template.conf` file, add them to the **JAVA_OPTS** parameter in the `/conf/whd.conf` file.
   - For example:
     `JAVA_OPTS=-Darg1=true -Darg2=true`
18. **Start Help Desk Manager** on the target server.
   - If the target server domain host name is identical to the original server domain host name, you are finished.
   - If the target server domain host name is different from the original server domain host name, perform the following steps:
     a. Log in to Help Desk Manager as an administrator.
     b. Click Setup > General > Options.
     c. In the Server DNS Name field, enter the new server DNS name.
     d. Click Save.
19. Log in to the Help Desk Manager Administrator Console as an administrator.
20. Click Setup > General > License.
21. Reactivate your license.

**Original server is running Linux or macOS and target server is running Windows Server**

1. Log in to Help Desk Manager as an administrator.
2. Click Setup > General > License.
3. Click the padlock next to your license.
4. In the License Settings screen, click Deactivate to deactivate your license.
5. Log out of the Help Desk Manager Administrator Console.
6. **Stop Help Desk Manager** on the original server.
7. Navigate to the `<HelpDeskManager>` directory.
8. Back up the `<HelpDeskManager>/conf` directory to a safe location.
9. Install an identical Help Desk Manager version on the target server.
10. Initialize Help Desk Manager using the Getting Started Wizard.
    When prompted, select the default PostgreSQL embedded database.
11. Log in to Help Desk Manager using admin/admin credentials.
12. Click Setup > General > Database.
13. Point Help Desk Manager to your original database.
    If the original server used embedded PostgreSQL, use port 20293.
14. **Stop Help Desk Manager** on the target server.
15. Navigate to the `conf` directory on the target server.

<table>
<thead>
<tr>
<th><strong>Operating System</strong></th>
<th><strong>Path</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows Server</td>
<td><code>&lt;HelpDeskManager&gt;\bin\wrapper\conf</code></td>
</tr>
<tr>
<td>Linux</td>
<td><code>&lt;HelpDeskManager&gt;/conf</code></td>
</tr>
</tbody>
</table>

16. Copy the following files from the original server to the same location on the target server:
   - `keystone.jks`
   - `whd.conf`
   - `labels/CustomLabels*.properties`

17. If you used custom VM arguments in the `JAVA_OPTS` parameter in the `/conf/whd.conf` file, add them to the `\bin\wrapper\conf\wrapper_template.conf` file.
   For example:
   ```
   wrapper.java.additional.16=-DWHDconfig=...Helpdesk.woa.properties
   ```
18. If the target server domain host name is identical to the original server domain host name, you are finished.
   If the target server domain host name is different from the original server domain host name, perform the following steps:
   a. Log in to Help Desk Manager as an administrator.
   b. Click Setup > General > Options.
   c. In the Server DNS Name field, enter the new server DNS name.
   d. Click Save.

19. Log in to the Help Desk Manager Administrator Console as an administrator.

20. Click Setup > General > License.

21. Reactivate your license.

Configure the general settings

The General settings allow you to set up, configure, and personalize your Help Desk Manager deployment.

These settings allow you to:

- **Configure the general options** that define how Help Desk Manager presents information to clients and techs.
- **Configure the server options** to manage the HTTP and HTTPS ports running on Help Desk Manager and create a new Java keystore (JKS) or a Public-Key Cryptography Standards #12 (PKCS12) Keystore.
- **Configure the authentication settings** used to access Help Desk Manager and migrate all client and tech passwords to FIPS 140-2 cryptography.
- **Configure the business zones** for the Customers managed by your help desk.
- **Configure the calendar settings** that determine the tickets and ticket reminders that display in the calendar.
- **Configure your Help Desk Manager screen** with style sheets and logos.
- **Customize the database connection settings** and backup schedule.
- **Set a critical level** for logging.
- **View your system environment settings**, such as the Java version and JVM memory allocation.

Apply the license

Your Help Desk Manager license key determines the number of Tech and Admin seats available. Help Desk Manager installs with a fully functional, 14-day trial license. When the trial license expires, Help Desk Manager automatically switches to a Free Single User license. To add more Tech and Admin seats, you must purchase a license key. Following your purchase, you receive your license key.

To apply a purchased license key:

1. In the Licensed To field, click the Lock icon.
2. Copy the license key text and paste it over the existing License Key text.
3. Click Save.
If you are upgrading Help Desk Manager from an existing installation that already has a purchased license key, the installation verifies that:

- The upgrade release date precedes your current maintenance contact expiration date.
- The number of licensed technicians is carried through to the new installation. This feature allows Admins to seamlessly upgrade to the latest version without entering a new license key.

After you apply a purchased license key, you cannot change the license back to a trial or free single-seat license.

**Configure the general options**

The General Options screen allows you to define how Help Desk Manager presents information to clients and techs. You can define how much information a client or tech can view, but you cannot filter dashboard data for administrators.

A basic Help Desk Manager deployment does not require any changes to the default settings. However, you can customize the general options for your environment. For example, you can force your deployment to use a secure HTTPS port or include direct contact information in your client emails.

> Limiting the amount of data displayed in search results or the dashboard can increase system performance.

1. In the toolbar, click Setup > General > Options.
2. Complete the fields and selections as required, and then click Save.
   - Click the tooltips for specific information about each option.
3. Click Save.

**Configure the server options**

Beginning in Help Desk Manager 12.5.1, you can enable HTTPS by configuring the server options located at Setup > General. These options allow you to:

- Configure the HTTP and HTTPS ports running on Help Desk Manager
- Create a new keystore to store your SSL certificates
- Create a new keystore with an existing wildcard certificate in PFX format
- Restart Help Desk Manager

After you configure the ports, Help Desk Manager copies the settings to the `whd.conf` file in the Help Desk Manager home directory. If you decide to update the `whd.conf` file on your own, the new settings are reflected in the user interface.

Using Keystore Options, you can create a custom Java Keystore (JKS) to share certificates for other applications. You can also create a new JKS or a Public Key Cryptography Standards #12 (PKCS12) keystore.
Enable a listening port

Enable the listening port to listen for HTTP or HTTPS requests, and then configure the port number used to monitor the requests.

After you configure the port, include the port number in URLs that refer to Help Desk Manager. For example, if you select port 8081, enter `https://localhost:8081` in the web browser.

1. Log in to Help Desk Manager as an administrator.
2. Click Setup > General > Server Options.
3. Click HTTP Enabled to enable the HTTP port.
4. Enter an HTTP port number between 0 and 6553 to monitor the HTTP request. For example, enter 8081 to process non-secure traffic from the Help Desk Manager Console.
5. Click HTTPS Enabled to enable the HTTPS port (if required).
6. Enter an HTTPS port number between 0 and 65535 to monitor the HTTPS request. For example, enter 8443 to process secure traffic from the Help Desk Manager Console.
7. Click Save.
8. Click Restart Help Desk Manager.

If you selected port 80 and receive an error, see this KB article for troubleshooting.

Redirect HTTP requests to an HTTPS port

To ensure all incoming requests use a secure connection, enable Redirect HTTP requests to HTTPS. When enabled, all incoming requests redirect to a secure HTTPS port.

1. Log in to Help Desk Manager as an administrator.
2. Click Setup > General > Server Options.
3. Click the Redirect HTTP Requests to HTTPS.
4. Click Save.
5. Click Restart Help Desk Manager.

Enable a URL port for generated URL links

Help Desk Manager generates internal URLs to link customer tickets to specific resources, such as an FAQ. For additional security, configure the generated URL links to access a secure port on the Help Desk Manager server.

For example, you can configure a web server to route requests for default port 80 to the default Help Desk Manager port 8081. As a result, all generated URL links use port 8081 to access the Help Desk Manager server.

1. Log in to Help Desk Manager as an administrator.
2. Click Setup > General > Server Options.
3. If HTTP is enabled, click Custom HTTP Port for Generated URL Links.
4. Enter an **HTTP port number** between 0 and 65535 for the generated URL link.

   - The default selection is port 8081.

5. If HTTPS is enabled, click Custom HTTPS Port for Generated URL Links.

6. Enter an **HTTPS port number** between 0 and 65535 for the generated URL link.

   - The default selection is port 443.

7. Click Save.

8. Click Restart Help Desk Manager.

**Create a new keystore**

By default, Help Desk Manager creates a Java KeyStore (JKS) at `<helpdeskmanager>/conf/keystore.jks` when you install the software. Using Keystore Options, you can create a custom JKS to share certificates for other applications.

1. In the Path field, enter a path to the keystore file on the server.
   - Include the file name in the path, such as `keystore.jks` (for JKS certificates) or `keystore.p12` (for PKCS12 certificates).
2. Click the Type drop-down menu and select a keystore file format.
3. Enter a new password for the keystore file.
   - The current password for the `keystore.jks` file is `changeit`. To use the existing password, leave the field empty.
4. Click Save.
5. Click Restart Help Desk Manager.

**Create a new keystore with an existing wildcard certificate in PFX format**

1. Log in to the Help Desk Manager server.
2. **Stop the Help Desk Manager service.**
3. Navigate to the WHD installation folder.
   - Microsoft Windows Server: `\Program Files\N-able Technologies\Help Desk Manager`
   - Red Hat/CentOS/Fedora Linux: `/usr/local/n-abletechnologies/helpdeskmanager`
4. Run:
   ```
   portecle.bat
   ```
5. Create a new keystore file.
   a. Click the File tab and select New Keystore.
   b. Select JKS (First option).
6. Import the keypair.
   a. Click the Tools tab and select Import Keypair.
   b. Locate the PFX file.
7. Enter **tomcat** as the alias, and click OK.
8. Enter your PFX password, and click OK.
9. Save the file.
   a. Click the File tab and select Save Keystore.
   b. Enter your PFX password.
   c. Name the file: keystore.jks
10. Set the certificate password.
    a. Right-click tomcat and select Set Password.
    b. Enter your PFX password, and click OK.
11. Save your changes.
    a. Click File > Save Keystore As.
    b. Save the file as: keystore.jks
12. In the conf folder, rename the old keystore.jks file (if applicable).
13. Copy the new keystore.jks file to the conf folder.
14. In the conf folder, open the whd.conf file in a text editor (such as Notepad).
15. In the file, locate the KEYSTORE_PASSWORD parameter, as shown below.
    # Keystore settings (for SSL connections)
    KEYSTORE_PASSWORD=changeit
    
    💭 Make sure you change default password with the same password you set earlier on the keystore.
16. Replace the default password with the password you set earlier in the keystore.
17. Save and close the whd.conf file.
18. Close the Help Desk Manager installation folder.
19. Restart the Help Desk Manager service.

Configure the authentication settings

The Authentication settings allow you to configure the authentication methods used to access Help Desk Manager.

Configure the authentication method and settings

1. In the toolbar, click Setup and select General > Authentication.
2. Complete the fields and selections in the top portion of the screen as required, then click Save.

💡 See Customize tickets, notes, instructions, and emails with BBCode for details about customizing your Login Message field text.

The following table describes the authentication methods you can select in the screen.
<table>
<thead>
<tr>
<th>AUTHENTICATION METHOD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Help Desk Manager</td>
<td>Authenticates the user with the user name and password. User names and passwords are pulled from the Help Desk Manager database or imported from Active Directory or LDAP connections.</td>
</tr>
<tr>
<td>CAS 2.0 (Central Authentication Service)</td>
<td>Uses a single sign on (SSO) service URL to authenticate the user provided by Help Desk Manager. The CAS server sends the user back to Help Desk Manager and attaches a &quot;ticket&quot; to the Help Desk Manager URL. Help Desk Manager submits the ticket to the CAS validate URL to obtain the user name of the authenticated user.</td>
</tr>
<tr>
<td>See Deploy SSO with CAS 2.0 for information on how to set up CAS 2.0 on your Help Desk Manager Tomcat server.</td>
<td></td>
</tr>
<tr>
<td>Servlet Authentication (for Apache Tomcat installations)</td>
<td>Provides the authenticated user name to Web applications using the HttpServletRequest.getRemoteUser() method.</td>
</tr>
<tr>
<td>HTTP Header</td>
<td>Uses Web servers (such as the Apache HTTP Server) to forward externally authenticated user information using HTTP headers.</td>
</tr>
<tr>
<td>HTTP Form Value</td>
<td>Forwards the authenticated user name through an HTTP name/value pair instead of an HTTP header.</td>
</tr>
</tbody>
</table>

**Set up the certificates**

Use Certificates to manage SSL and Apple Push Notification Services (APNS) certificates.

When a web browser submits an HTTPS request to Help Desk Manager, the SSL protocol requires the application to respond with a certificate to verify the authenticity of the server. The certificate contains a public key used for encryption and a digital signature from a Certification Authority (CA). The digital signature indicates which CA verified the authenticity of the server.

Help Desk Manager stores the certificates in the Java keystore located at <HelpDeskManager>/conf/keystore.jks. You can also store the certificates in a separate Public-Key Cryptography Standards #12 (PKCS12) KeyStore, or Java KeyStore (JKS) that you create in Server Options.
APNS certificates enable Help Desk Manager to send notifications to an Apple device running Help Desk Manager Mobile and a supported Apple iOS. When enabled, the device receives Short Message Service (SMS) text messages each time a customer ticket is created or updated.

SSL certificates

SSL certificates create a secure connection between Help Desk Manager and an external resource. Help Desk Manager supports the following SSL certificates:

- Self-signed SSL certificate
- Certificate from a Certificate Authority (CA)
- Public-Key Cryptography Standards (PKCS) #12 certificate

The Certificates page displays all certificates that are currently in the keystore and defined in the `.conf` file. In this example, the Apache Tomcat SSL certificate is installed in the keystore.

The following table lists some third-party applications used with Help Desk Manager that require an SSL certificate.

<table>
<thead>
<tr>
<th>PRODUCT</th>
<th>SSL CERTIFICATE FUNCTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apache Tomcat</td>
<td>Creates a secure connection to the Apache Tomcat web and application server.</td>
</tr>
<tr>
<td>Microsoft® Exchange Server®</td>
<td>Creates a secure connection to the Exchange server used to retrieve incoming Help Desk Manager ticket emails sent from clients.</td>
</tr>
<tr>
<td>PostgreSQL</td>
<td>Creates a secure connection to an external PostgreSQL database.</td>
</tr>
</tbody>
</table>

**Import an SSL certificate in CER format**

Download the SSL certificate file in CER format from the certificate provider. After you unzip the file, upload the P12 or PFX certificate into Help Desk Manager.
1. Download the SSL certificate from the third-party software website.
2. Unzip the file.
3. Log in to Help Desk Manager as an administrator.
4. Click Setup > General > Certificates.
5. Under Certificates in the keystore, click Upload, and then click Browse.
6. Navigate to the unzipped file directory.
7. Complete the on-screen prompts to install the SSL certificate.
8. Click Restart to restart the Help Desk Manager server.

The SSL certificate is installed on the Help Desk Manager server.

Import an SSL certificate in PFX format

This procedure describes how to import an SSL certificate in PFX format into Help Desk Manager using the Porteclé application included with Help Desk Manager. Porteclé is a third-party open-source utility that provides a graphical user interface for administering the keystore on the Windows or macOS platforms.

1. Stop the Help Desk Manager services.
2. Navigate to:
   
   C:\Program Files\N-able Technologies\Help Desk Manager
3. Right-click Porteclé.bat and select Run as administrator.
4. In Porteclé, click File > Open and then locate and open the keystore.jks file.
5. Delete the existing keypair by deleting the tomcat entry.
   a. Right-click the tomcat entry and select Delete.
   b. Click Tools > Import Keypair and select your PFX/p.12 file.
6. Enter the PFX password.
7. Change the alias name to:
   
   tomcat
8. Click File > Save Keystore to save the keystore file, overwriting the existing file.
9. Navigate to:
   
   C:\Program Files\N-able Technologies\Help Desk Manager
10. Open the whd.conf file in a text editor (such as Notepad).
11. In the file, locate:
    
    # Keystore settings (for SSL connections)
12. In this section, locate:
    
    KEYSTORE_PASSWORD=changeit
13. Replace changeit with the same password you set for the keystore in a previous step.
14. Save and close the whd.conf file.
15. Restart the Help Desk Manager services.
Delete a certificate

1. Select a certificate in the keystore.
2. Click Delete.
3. Follow prompts on your screen to delete the certificate.

Edit an alias

Some resources require the keypair to have a specific alias. For example, the Apache Tomcat web server requires its keypair to have a `tomcat` alias to enable HTTPS. To change the certificate alias, upload the certificate into the keystore. When you are finished, select the certificate and edit the alias.

```
If the alias name is empty or incorrect, the resource will not use the correct certificate and create its own certificate.
```

1. Locate the alias name required for the certificate.
2. Select a certificate in the keystore.
3. Click Edit Alias.
4. Enter a new name for the certificate, and click Save.
   The new certificate name displays in the keystore list.

Apple Push Notification Services certificates

APNS requires an APNS Certificate that establishes the communications link between APNS and the Apple device. This certificate is included with Help Desk Manager.

The APNS panel displays the current APNS Certificate expiration date and allows you to upload a new APNS Certificate file when the existing file expires.

```
APPLE PUSH NOTIFICATION SERVICES

Current APNS Certificate expiration date
8/26/17 12:49 PM
SEND TEST NOTIFICATION

Upload a new APNS Certificate file
BROWSE No file
```

To enable APNS on an Apple device:
1. **Set up and register the device** with the Help Desk Manager server.
2. **Enable SMS** on the Apple device.
3. **Send a test notification message** to the Apple device to verify that APNS is enabled.

**Set up and register a device**

Install the Help Desk Manager Mobile software and register the Apple device with the Help Desk Manager server.

1. Locate the following Help Desk Manager server information:
   - Host name or IP address
   - Port number (secure TCP 8443 or non-secure TCP 8081)
2. Download Help Desk Manager Mobile from the Apple iTunes site.
3. Install the software on the Apple device.
4. Complete the online registration form.
5. Log in to Help Desk Manager.
6. Click Setup > Techs > Techs.
7. Click your name in the Tech Name column.

![Tech Name](image)

8. In the Account Info tab, scroll down to Mobile Devices Setup and verify that your Apple device displays as a registered device.

![Registered Devices](image)

**Enable the Short Message Service (SMS)**

Enable Help Desk Manager to send SMS text messages to the Apple device.

1. In the Account Info tab, click to enter Edit mode.
2. Scroll down to E-Mail Setup and select the SMS E-Mail Enabled checkbox.
   Additional options display under the setting.
3. Enter the email address associated with the Apple device. For example, if the device uses Verizon email, enter joeadmin@vtext.com. Contact your mobile carrier for the proper email format.

4. Select the minimum ticket priority that triggers an SMS e-mail to the Apple device.

5. Select the minimum ticket alert level that triggers an SMS e-mail to the Apple device.

6. (Optional) Select the Repeating check box to continue sending SMS e-mails until the ticket condition is updated.

7. Click Save.

Send a test notification message

Verify that the Apple device receives APNS notifications from the Help Desk Manager server.

1. Click Setup > General > Certificates in the Help Desk Manager Console.
2. Under Apple Push Notification Services, click Send Test Notification.
3. Verify that you received a notification on your Apple device.
   APNS is configured for the Apple device.

Upload and install a new APNS certificate

When the APNS certificate expires, download a new APNS Certificate from the SolarWinds Customer Portal and install the certificate using the Help Desk Manager Console.

1. Download an updated APNS certificate.
   b. Click the License Management drop-down menu and select My Downloads.
   c. Click the Products drop-down menu and select Help Desk Manager.
   e. Click Download.
      The file is downloaded to the server.
2. Unzip the file contents to a network share.
3. Click Setup > General > Certificates in the Help Desk Manager Console.
5. Navigate to the unzipped file.
6. Complete the on-screen prompts to complete the upload.
7. Click Restart to restart the Help Desk Manager server.
   The new APNS certificate is installed and the new APNS certificate expiration date displays in the Certificates page.

**Current APNS Certificate expiration date**
8/26/17 12:49 PM
**Configure the business zones and calendar settings**

The Time & Place settings allow you to set up business zones for your primary and remote call center locations. You can also configure the calendar settings to format the ticket due dates and work time events that display in the calendar for each client ticket.

**About business zones**

Business zones describe the time zone, country, business hours, and other related information for your primary and remote call center locations. You can set up business zones that apply to cities or countries where your techs assist clients.

The Business Zone tab defines the default location and time zone for your primary help desk location. This ensures that all dates stored in the database and downloaded in your calendar subscriptions include times and dates based on your selected time zone.

When you set up Help Desk Manager for the first time, the Business Zone tab includes a default business zone. Set the default business zone so it applies to your primary business location and time zone. If you have techs in help desk operation centers located in multiple cities or countries, you can add additional business zones for these locations.

> You can assign business zones to techs and locations. Clients inherit their business zone based on their location.

The following example displays multiple business zones with locations that span several countries. Each zone includes an identifying name and time zone. In this example, America/Atlanta is set as the default zone.

<table>
<thead>
<tr>
<th>Business Zones</th>
<th>Calendars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Time Zone</td>
</tr>
<tr>
<td>America/Atlanta (Help Desk Default)</td>
<td>America/New_York</td>
</tr>
<tr>
<td>America/Los Angeles</td>
<td>America/Los_Angeles</td>
</tr>
<tr>
<td>Asia/Tokyo</td>
<td>Asia/Tokyo</td>
</tr>
<tr>
<td>Australia/Sydney</td>
<td>Australia/Sydney</td>
</tr>
<tr>
<td>Europe/Berlin</td>
<td>Europe/Berlin</td>
</tr>
<tr>
<td>Europe/London</td>
<td>Europe/London</td>
</tr>
</tbody>
</table>
Set the default business zone

1. Click Setup > General > Time and Place.
2. In the Name column, click the Help Desk Default business zone.

3. In the Business Zones tab, delete the existing name and enter a name for your primary business zone.
4. Select the time zone where your Help Desk Manager server is installed.
   This setting ensures that all dates stored in the database and downloaded in your calendar subscriptions include times and dates based on your selected time zone.
   To use the host server time zone, accept the system default time zone. To assign another time zone, click the drop-down menu and select a time zone. See the Greenwich Mean Time (GMT) website for assistance with selecting a time zone format.
5. Select the country where your Help Desk Manager server is installed.
   This setting formats the currency, numbers, percentages, dates, and times that display in Help Desk Manager for your default location. The number formats provide an example based on your selected country.

   You can configure a custom date and time formats in the upcoming steps.

6. Select the number of digits to use in the fraction part of currency or accept the default selection.
7. Select a date format or accept the default chosen automatically based on your Country selection.
   The following table lists the supported date format characters.

<table>
<thead>
<tr>
<th>Character</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>M</td>
<td>The month in a calendar year.</td>
</tr>
<tr>
<td>d</td>
<td>The target day of the month.</td>
</tr>
<tr>
<td></td>
<td>To include a leading zero, use two characters. For example, if the date is the first day of the month, you can use d to display 1 or dd to display 01.</td>
</tr>
<tr>
<td>yy</td>
<td>The current year in two-digit format.</td>
</tr>
<tr>
<td>yyyy</td>
<td>The current year in four-digit format.</td>
</tr>
</tbody>
</table>
8. Select a time format or accept the default selection chosen automatically based on your Country selection.

The following table describes the supported time format characters.

<table>
<thead>
<tr>
<th>CHARACTER</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>h</td>
<td>The hour in 12-hour notation. Enter a value between 1 and 12.</td>
</tr>
<tr>
<td>H</td>
<td>The hour in 24-hour notation (military time). Enter a value between 1 and 24.</td>
</tr>
<tr>
<td>m</td>
<td>The minutes in an hour. To include a leading zero, use two characters. For example, if the time is five minutes past the hour, you can use m to display 5 and mm to display 05.</td>
</tr>
<tr>
<td>s</td>
<td>The seconds in a minute.</td>
</tr>
<tr>
<td>z</td>
<td>The time zone abbreviation.</td>
</tr>
<tr>
<td>Z</td>
<td>The time zone offset from GMT or RFC 822 time zone. For example, Central Time is GMT-05:00 (GMT minus five hours).</td>
</tr>
</tbody>
</table>

9. Select the business hours and work days to include when calculating the ticket open time.

When you select your business hours, select the hours when your help desk team is available to provide support for your clients. The default selection indicates a 24-hour business day, with the Start and End time set to identical values.

10. Click Save.

Create a new business zone

1. Click Setup > General > Time and Place.
2. Click New.
3. In the Business Zones tab, enter a name for the new business zone.
4. Follow step 4 through step 10 in Set the default business zone, entering the details about the new location.

About the calendar

The calendar displays scheduled and due client tickets in a calendar format. Techs can use the calendar to track pending tickets and plan their weekly schedule. Click Calendar in the toolbar to access the calendar.

The Calendars tab contains the ticket due dates and work time events that display in the calendar for each client ticket. By default, each calendar entry displays the ticket number, due status, and abbreviated client name. If the ticket includes a scheduled date and due date, Help Desk Manager adds separate event entries for each date.

See View the ticket due dates and work schedules in the calendar for details about using the calendar.
The following example shows the Calendars tab and the default settings.

![Calendars Tab](image)

Select the ticket details that display in the calendar. Calendar events for due tickets display the date when the ticket request is scheduled to be completed. This date is based on the ticket due date selections.

For example, ticket number 114 is due on the 14th day of the month. If you select the Due Tickets check box, the ticket number and client name display in the calendar on the 14th day based on the formatting options you select in the Calendars tab for due date calendar events.

![Calendar Example](image)

If you select the Scheduled Tickets and Due Dates check boxes, the scheduled ticket events display as well, based on the formatting options you select in the Calendars tab for the work time calendar events.

![Calendar Example](image)

Select the calendar display options

1. Click Setup > General > Time & Place.
2. Click the Calendars tab.
3. Select the tickets to include in your calendar.
   - Select Scheduled Tickets to include calendar events for the ticket work schedules.
   - Select Due Tickets to include calendar events for the ticket due dates.
4. Select a window of time for your calendar events.

   Ticket work time and due dates outside the selected value are not included in the calendar.

5. Select a calendar display format.
   Select this option to subscribe to the calendar events in your Outlook or iCalendar.
   Deselect this option to only view all calendar events in the Help Desk Manager calendar.

6. Enter a display format for due dates that display in the calendar or accept the default format.
   See Calendar event text formats for additional formatting options.

7. Select a display format for scheduled work time events that display in the calendar, or accept the default format.
   See Calendar event text formats for additional formatting options.

8. Click Save.

Calendar event text formats

The following table lists the ticket attributes you can use to format the calendar event text that displays in the calendar.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ticket number</td>
<td>&lt;ticket_id&gt;</td>
</tr>
<tr>
<td>Request type</td>
<td>&lt;request_type&gt;</td>
</tr>
<tr>
<td>Status type</td>
<td>&lt;status_type&gt;</td>
</tr>
<tr>
<td>Priority type</td>
<td>&lt;priority_type&gt;</td>
</tr>
<tr>
<td>Client's full name</td>
<td>&lt;client&gt;</td>
</tr>
<tr>
<td>Client's first initial and last name</td>
<td>&lt;client_short&gt;</td>
</tr>
<tr>
<td>Client's primary phone</td>
<td>&lt;client_phone&gt;</td>
</tr>
<tr>
<td>Client's primary e-mail</td>
<td>&lt;client_email&gt;</td>
</tr>
<tr>
<td>Party responsible for the ticket</td>
<td>&lt;assigned_to&gt;</td>
</tr>
<tr>
<td>The responsible party can be a tech,</td>
<td></td>
</tr>
<tr>
<td>tech group, or manager.</td>
<td></td>
</tr>
<tr>
<td>Party responsible for the ticket</td>
<td>&lt;assigned_to_short&gt;</td>
</tr>
<tr>
<td>The responsible party can be a tech,</td>
<td></td>
</tr>
<tr>
<td>tech group, or manager.</td>
<td></td>
</tr>
<tr>
<td>Tech's full name</td>
<td>&lt;tech&gt;</td>
</tr>
<tr>
<td>Tech's first initial and last name</td>
<td>&lt;tech_short&gt;</td>
</tr>
<tr>
<td>Tech's primary phone</td>
<td>&lt;tech_phone&gt;</td>
</tr>
<tr>
<td>Attribute</td>
<td>Format</td>
</tr>
<tr>
<td>--------------------------------------------------------------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>Tech’s primary e-mail</td>
<td>&lt;tech_email&gt;</td>
</tr>
<tr>
<td>Room</td>
<td>&lt;room&gt;</td>
</tr>
<tr>
<td>Location</td>
<td>&lt;location&gt;</td>
</tr>
<tr>
<td>Model number</td>
<td>&lt;model&gt;</td>
</tr>
<tr>
<td>Subject</td>
<td>&lt;subject&gt;</td>
</tr>
<tr>
<td>Report</td>
<td>&lt;report&gt;</td>
</tr>
<tr>
<td>Date &amp; time Ticket is due</td>
<td>&lt;due_datatetime&gt;</td>
</tr>
<tr>
<td>Scheduled Date and time when the tech works on the ticket request</td>
<td>&lt;scheduled_datetime&gt;</td>
</tr>
<tr>
<td>(compatible with previous HDM versions)</td>
<td>&lt;work_datetime&gt;</td>
</tr>
<tr>
<td>Work time recorded in the ticket tech notes</td>
<td>&lt;work_time&gt;</td>
</tr>
<tr>
<td>First custom field</td>
<td>&lt;custom_1&gt;</td>
</tr>
<tr>
<td>Second custom field</td>
<td>&lt;custom_2&gt;</td>
</tr>
<tr>
<td>nth custom field</td>
<td>&lt;custom_n&gt;</td>
</tr>
</tbody>
</table>

**Configure the look and feel**

The Look and Feel screen allows you to configure your Help Desk Manager screen with style sheets and logos. By applying a style sheet to your deployment, you can render your Log In screen and the client interface with your corporate branding.

**Add your company logo**

1. Locate a PNG or GIF image file for your logo.

   ❔ For the classic style sheet (CSS), the image should be 259 x 61 pixels. Otherwise, the image height should be 70 pixels or less.

2. Log in to the Help Desk Manager Admin Console as an administrator.
3. Click Setup > General > Look and Feel.
   The Look and Feel page displays.

4. Click Clear to remove the default logo.
   The Add File button displays in the Logo field.
5. Click Add File and select the logo image file.
6. Click Save.
   Your company logo displays in the Logo field.

Install and apply a new style sheet template

1. Download your style sheet template.

   The Help Desk Manager Product Forum on THWACK contains additional CSS templates you can use in your deployment. Click Content Exchange > CSS Gallery to access the templates.

2. Copy the content of the zipped CSS file into the clipboard.
3. In the Client Style Sheet row, select Custom and click Edit CSS to open the CSS editor.
4. Remove any existing content in the editor (if available).

5. Paste the template from the clipboard.

6. Select Replace Default CSS and Compress.

7. Click Update to refresh the panel with parameters from the new template.

8. Review the new style sheet implementation at the bottom of the page.
9. Adjust the template Header, Help Desk Name, and Button Bar color, size, and spacing parameters to suit your needs.

10. Click Save to activate the new style sheet.

**Customize the database connection**

The Database Connection screen allows you to customize your database connection settings and backup schedule.

When you install and run Help Desk Manager for the first time, the application automatically selects the embedded PostgreSQL database and will not prompt you for a database connection or license key. If you decide to use an external database, update your database connection settings in this screen. When you are finished, click Save and restart Help Desk Manager to enable your new settings.

> When required, you can restore the PostgreSQL database using the administrator console and pgAdmin3.

1. In the toolbar, click Setup and select General > Database.
2. Click the Vendor drop-down menu and select the appropriate database for your Help Desk Manager installation.
   - If you select PostgreSQL as your primary database, select the Use Embedded Database check box to use the embedded PostgreSQL database included with Help Desk Manager.
   - When you deselect Use Embedded Database, the Database field displays.
3. In the Host field, enter the IP address or DNS name of the server hosting the Help Desk Manager database.
4. In the Port field, enter the port number for the database connection.
   The default ports include 3306 (MySQL), 1433 (Microsoft SQL Server), and 5432 (PostgreSQL).
5. In the Database field (if available), enter the name of your Help Desk Manager database.
6. In the Username and Password fields, enter the user name and password for your Help Desk Manager database connection.
7. In the Backup Schedule row, select the days of the week and time of day when Help Desk Manager will automatically backup the database.
   Otherwise, leave this row blank to prevent Help Desk Manager from scheduling a backup.
8. In the Backup Folder row (if available), select or enter the appropriate backup folder path to store your database backup files.
9. In the Number of backups drop-down menu (if available), select the total number of backups to store in your database backup file.
   Help Desk Manager uses first-in, first-out database storage logic. For example, if you choose to save five backup files and in time save a sixth backup file, the first backup in the series will be deleted.
10. Click Backup Now to back up your new Help Desk Manager database file to your backup folder.

   If a Backup command returned exit code 1 error displays, see this KB article for details.

11. Click Save.
12. Click Restart Help Desk Manager to enable your new database connection settings.

Set the log settings

Log files provide an archeological record of events that occur in the application. Administrators and technical support personnel can use log files to pinpoint when events occur and resolve issues in the application.

Beginning in version 12.7.3, all Help Desk Manager errors are recorded in the Help Desk Manager log file (whd.log) located at <HelpDeskManager>/logs. To prevent unauthorized system access, this log file cannot be sent to a remote server.

The Log Settings window includes three log groups with corresponding log levels that control the level of event detail recorded in the Help Desk Manager log file. These settings are not required for your initial configuration, but are typically used for troubleshooting. You can access the Log Settings window at Setup > General > Logs.

The log settings displayed above are the default settings. You can change these settings to track specific issues in the application. After you restart Help Desk Manager, all log settings return to their default values.
Log groups

The Log Settings window includes three log groups that log specific events to the `whd.log` file. The following table describes the log events recorded in each group.

<table>
<thead>
<tr>
<th>GROUP</th>
<th>DESCRIPTION</th>
<th>LOG FILE IDENTIFIER</th>
</tr>
</thead>
<tbody>
<tr>
<td>N-able Help Desk Manager Daemon Services</td>
<td>Logs events generated from daemon services. These services monitor application processes, such as alerts, LDAP synchronization, and ticket asset recovery.</td>
<td>whd.daemon</td>
</tr>
<tr>
<td>N-able Help Desk Manager Application</td>
<td>Logs application process events related to data imports, utilities, and authorization. This group also logs events for exchange connectors used to monitor incoming and outgoing mail communications between Help Desk Manager and a Microsoft Exchange server. These connectors include App Logger and HTTP Client.</td>
<td>whd.application (except for exchange connectors)</td>
</tr>
</tbody>
</table>

Log levels

A log level defines the events recorded in the Help Desk Manager log file for a corresponding log group. The following table describes the logging levels you can apply to each log setting.

> Changing a log setting enables all sub-level settings to inherit the same setting.

<table>
<thead>
<tr>
<th>LEVEL</th>
<th>INDICATOR</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Off</td>
<td>☐☐☐☐☐</td>
<td>Records no events.</td>
</tr>
<tr>
<td>Error</td>
<td>☐☐☐☐●</td>
<td>Records error events that may impact application performance or cause the application to fail.</td>
</tr>
<tr>
<td>Warn</td>
<td>☐☐☐●●</td>
<td>Records error and warning events that may cause some features to generate unexpected results.</td>
</tr>
<tr>
<td>Info</td>
<td>☐☐●●●</td>
<td>Records information events that highlight application processes. These events indicate normal behavior.</td>
</tr>
<tr>
<td>Debug</td>
<td>☐●●●●</td>
<td>Records the path of execution from the first application entry point to the point in the code where the exception occurred. This granular information can be useful for debugging the application. This level may impact the application performance.</td>
</tr>
</tbody>
</table>
**LEVEL** | **INDICATOR** | **DESCRIPTION**
---|---|---
Trace | ![Indicator](image) | Provides verbose logging compared to Debug. This level may impact the application performance.

Modify the default log settings

The Log Settings window includes the default log settings. You can modify the default settings by performing the following steps:

1. **Select the log settings** and corresponding log levels you want to define for your default settings.
2. **Create an argument for each new log setting.**
3. **Add the new arguments to the logback configuration file.**
4. **Restart Help Desk Manager.**

The following sections provide an example of how to modify selected log settings with default log levels.

**Select the target log settings**

1. Log in to Help Desk Manager as an administrator.
2. Click Setup > General > Logs.
3. Select the log settings you want to configure as your new default settings.
4. Locate the identifier for each selected log setting.
   - Help Desk Manager Application (`whd.helpdesk`)
   - Help Desk Manager Packages (`whd.helpdesk.com.macdesign.whd`)
5. Determine the log level that you want to apply to each setting.

<table>
<thead>
<tr>
<th>IDENTIFIER</th>
<th>DESIRED LOG LEVEL</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>whd.helpdesk</code></td>
<td>Trace</td>
</tr>
<tr>
<td><code>whd.helpdesk.com macdesign.whd</code></td>
<td>Debug</td>
</tr>
</tbody>
</table>

**Create an argument for each new log setting**

Create arguments for each identifier and corresponding log level using the following syntax:
Add the new arguments to the logback configuration file

Add the arguments you created in the previous section to the logback configuration file. When you are finished, restart Help Desk Manager and verify that your new default settings are correct.

1. Log in to the Help Desk Manager server as an administrator.
2. Navigate to:
   
   `<HelpDeskManager>/conf`
   
   where `<HelpDeskManager>` is your Help Desk Manager home folder.
3. Backup the logback-config.xml file to a separate location.
4. Right-click the logback-config.xml file and select Run as administrator.
5. Open the file in a text editor (such as Notepad).
6. Locate the following code in the file. This code indicates the current default settings.

   ```xml
   <logger name="com.solarwinds" level="INFO" />
   <root level="ERROR">
       <appender-ref ref="R"
   <appender-ref ref="STDOUT" />
   </root>
   ```

   In this section of code, `<root level="ERROR">` indicates that all log levels are set to Error except for the settings defined in logger_name arguments.

7. Enter your new arguments under the first logger_name argument.

   ```xml
   <logger name="com.solarwinds" level="INFO" />
   <logger name="whd.helpdesk" level="TRACE">
   <logger name="whd.helpdesk.com.macdesign.whd" level="DEBUG">
   <root level="ERROR">
       <appender-ref ref="R"
   <appender-ref ref="STDOUT" />
   </root>
   ```

8. Save and close the file.
9. Restart Help Desk Manager.
10. Log in to Help Desk Manager.
11. Click Setup > General > Logs.

The Log Settings window displays the new default settings.

In this example:

- All Help Desk Manager Application parent and child settings are set to Trace.
- The Help Desk Manager Packages settings are set to Debug because the logger name argument for this setting overrides its parent setting.
- The Exchange Connector settings retain the root-level Error setting because the new default setting only applies to file names that include whd.helpdesk.

View the system information

The System Environment screen located at Setup > General > System Information contains information about troubleshooting and understanding your server's configuration.
Prepare the HDM database

HDM supports the following databases:

- Embedded PostgreSQL
- MySQL
- Microsoft SQL Server Standard or Enterprise Edition

⚠️ If your HDM deployment requires database management features such as failover clusters, do not use the embedded PostgreSQL database included with HDM. Failover clusters are not available with the embedded PostgreSQL database.

⚠️ To prevent database errors in the application, do not modify the default schemas.

If you choose embedded PostgreSQL as your primary database, HDM installs the database on the HDM server during the installation. No additional configuration is required.

If you choose non-embedded, non-default SQL Server or MySQL as your primary database, install the database engine and management tools on a separate server prior to installing HDM. See the Microsoft Docs or MySQL website for installation instructions.

Install SQL Server or MySQL on a dedicated drive with at least 20 GB of space to accommodate the database engine, management tools, help desk tickets, and ticket file attachments. You can also configure HDM to use a new SQL Server database instance on an existing server running SQL Server.

After you install the MySQL software, prepare the MySQL time zone tables.

After you install the SQL Server software, enable TCP/IP on the SQL server and create and configure your SQL Server database.

**Prepare the MySQL time zone tables**

If you choose non-embedded, non-default MySQL as your primary database, install the database and manually populate your time zone system tables.

You can search for tickets using two new qualifiers: Due Date and First Call Resolution. These qualifiers rely on data located in four MySQL system tables:

- time_zone
- time_zone_name
- time_zone_transition
- time_zone_transition_type
These tables are created when you install MySQL in your deployment, but are not populated by default with data. HDM requires this data because the Due Date and First Call Resolution qualifier logic is implemented from within the database. If the database is missing time zone data, these qualifiers do not work properly.

When you install your MySQL database, be sure to manually populate these system tables with time zone data. See the MySQL website and follow the instructions for MySQL Server time zone support.

You can check the system tables by executing the following query:

```sql
SELECT * FROM mysql.time_zone
```

If the query does not create new table rows, the tables are not populated with data.

**Enable TCP/IP on SQL Server**

Configure the following settings in the SQL Server Configuration Manager.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>TCP/IP Protocol</td>
<td>Enabled in SQL Server Network Configuration &gt; Protocols for SQL 20xx</td>
</tr>
<tr>
<td>IP Address</td>
<td>127.0.0.1 (if installed on the Help Desk Manager server)</td>
</tr>
<tr>
<td></td>
<td>Server IP address (if installed on a separate server)</td>
</tr>
<tr>
<td>TCP Port</td>
<td>1433</td>
</tr>
<tr>
<td>IPAll</td>
<td></td>
</tr>
<tr>
<td>TCP Dynamic Ports</td>
<td>Blank</td>
</tr>
<tr>
<td>TCP Port</td>
<td>1433</td>
</tr>
</tbody>
</table>

**Create and configure your SQL Server database**

Configure the following settings in the SQL Server Management Studio for SQL Server to create and configure SQL Server to the Help Desk Manager database instance.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>SQL Server and Windows Authentication Mode</td>
<td>Enabled</td>
</tr>
<tr>
<td>Login Name</td>
<td>whd</td>
</tr>
<tr>
<td>SQL Server Authentication: Password</td>
<td>Enabled and configured</td>
</tr>
<tr>
<td>SQL Server Authentication: Enforce password policy</td>
<td>Disabled</td>
</tr>
</tbody>
</table>
Configure Microsoft SQL Server

To configure SQL Server for your Help Desk Manager deployment, use the SQL Server Configuration Manager to enable TCP/IP on SQL Server. When completed, use SQL Server Management Studio for SQL Server to create and configure SQL Server to the Help Desk Manager database instance.

Enable TCP/IP on SQL Server

Configure the following settings in the SQL Server Configuration Manager.

<table>
<thead>
<tr>
<th>SETTING</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
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<td>Enabled in SQL Server Network Configuration &gt; Protocols for SQL 20xx</td>
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<td>TCP Port</td>
<td>1433</td>
</tr>
<tr>
<td><strong>IPAll</strong></td>
<td></td>
</tr>
<tr>
<td>TCP Dynamic Ports</td>
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<td>1433</td>
</tr>
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Create and configure your SQL Server database

Configure the following settings in the SQL Server Management Studio for SQL Server to create and configure SQL Server to the Help Desk Manager database instance.

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<tr>
<td>SQL Server and Windows Authentication Mode</td>
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<tr>
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</tr>
<tr>
<td><strong>SETTING</strong></td>
<td><strong>VALUE</strong></td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td>SQL Server Authentication: Password</td>
<td>Enabled and configured</td>
</tr>
<tr>
<td>SQL Server Authentication: Enforce password policy</td>
<td>Disabled</td>
</tr>
<tr>
<td>SQL Server Authentication: Enforce password expiration</td>
<td>Disabled</td>
</tr>
<tr>
<td>SQL Server Authentication: User must change password at next login</td>
<td>Disabled</td>
</tr>
<tr>
<td>Database name</td>
<td>whd</td>
</tr>
<tr>
<td>Database owner</td>
<td>whd</td>
</tr>
</tbody>
</table>

**Configure MySQL**

1. Start MySQL Workbench and connect to the MySQL database server.
2. Create a new schema with the following settings:
   - Name: HDM
   - Collation type: utf8 - utf8_general_ci
3. Open the Configuration > Options File.
4. Configure the following settings:
   - Networking - Port: 3306
   - General - default-storage-engine: InnoDB
   - Misc - init_connect: SET NAMES utf8
5. Stop and then restart the server.
6. Configure the Users and Privileges settings with the following:
   - Login Name: HDM
   - Password: `<your_password>`
   - Limit Connectivity to Hosts Matching: localhost
7. Configure your Schema Privileges.
   a. Select the HDM user.
   b. Add a new entry with your host in the Host box.
   c. In the Schema box, select Selected Schema and HDM and click OK.
   d. Select all Object, DDL, and Other rights check boxes.
8. Save your changes.
Integrate Apache Tomcat

By default, Help Desk Manager runs on port 8081. If Apache Tomcat is not required and you prefer to run the application on port 80, perform the following steps:

1. Stop Apache.
2. Set the DEFAULT_PORT variable in <HelpDeskManager>/conf/whd.conf to 80.
3. Restart Help Desk Manager.
4. Enable Apache to run on port 80 by allowing it to proxy requests to the Help Desk Manager on port 8081.
   a. Open the <HelpDeskManager>/conf/whd.conf file.
   b. In the file, set the URL_DEFAULT_PORT setting to 80
   c. Save the <HelpDeskManager>/conf/whd.conf file.
   d. Enable mod_proxy as described in the Apache HTTP Server Version 2.0.
      See Apache Module mod_proxy on the Apache Software Foundation site for more information.
   e. Add the following lines at the end of your Apache httpd.conf configuration file:

```
>ProxyPass /helpdesk http://localhost:8081/helpdesk
ProxyPassReverse /helpdesk http://localhost:8081/helpdesk
```
   f. Save the file.
      When completed, the application will appear as if it is running on port 80.
5. Restart your Apache server.

Disable IIS

Help Desk Manager does not integrate with IIS. Help Desk Manager runs on port 8081 by default. To run Help Desk Manager on port 80, disable IIS on your Windows Server system.

Additionally, if your system is connected to multiple IP addresses and one IP address uses IIS, bind IIS and Help Desk Manager to separate the IP addresses.

Disable IIS on Windows Server systems

You can disable IIS on Windows Server 2008 systems.

Disable IIS on Windows Server 2008 systems

To run Help Desk Manager on port 80 and disable IIS on Windows Server 2008:

1. Stop Help Desk Manager.
2. Go to Startup > Administrative Services > Server Manager.
3. Click Roles.
4. Select IIS, and then click HDM.
5. Click Confirm.
6. Open the following file:
   \Program Files\N-able Technologies\Help Desk Manager\conf\whd.conf

7. Set the DEFAULT_PORT setting to the following:
   DEFAULT_PORT=80

8. Save the following file:
   \Program Files\N-able Tecnologies\Help Desk Manager\conf\whd.conf

9. Start Help Desk Manager.

Bind IIS to a Windows interface

To specify or Help Desk Manager, edit the \Program Files\N-able Technologies\Help Desk Manager\conf\whd.conf file and set the IP_ADDRESS option to the desired IP address.

Bind IIS to an interface on Windows Server 2008

1. Log on with the local Administrator account.
2. Open a command prompt window.
3. Execute the following command:
   netsh http add iplist en ipaddress=xxx.xxx.xxx.xxx
4. To check your settings, enter:
   netsh show iplist en
5. Restart IIS.

Set up your email accounts

You can set up your email options, templates, and incoming and outgoing mail accounts at Setup > E-Mail. Help Desk Manager supports multiple accounts for receiving and sending email.

Each incoming mail account is associated with a specific request type and an optional tech group. Incoming mail accounts are checked each minute for new messages. Help Desk Manager processes each message, turns the messages into tickets, and then deletes the messages from the incoming mail server. Each incoming mail account is associated with an outgoing mail account (SMTP server) used to deliver outgoing mail.

If you need to troubleshoot incoming-email-to-ticket processing, see this KB article.

You can define custom greetings in templates associated with a specific status type and an optional request type. You can personalize these templates using tags that provide placeholders for parameters, such as last name, first name, and ticket number.

See the following sections for details:

- Configure an outgoing email account
- Configure an incoming email account
- Configure an incoming email account for Office 365
Apply your email templates
Apply your tags in email templates

Simplify email management – options

You can simplify incoming mail processing by configuring the E-Mail Options screen located at Setup > E-Mail > Options.

- Click the tooltips for details on configuring each setting.

Configure the email timeout setting

1. Click Setup > E-Mail > Options.
2. In the Connection Timeout field, enter the number of seconds HDM should wait before timing out of an incoming or outgoing email account connection.
3. Click Save.

Accept email from unknown senders

In the screen, you can configure Help Desk Manager to accept email from unknown senders in your client domains or define and maintain lists of each email recipient for each client. The screen also includes options for restricting email formats, senders, and contents.

1. Click Setup > E-Mail > Options.
2. Locate the Incoming Mail section.
3. In the Create Accounts for Unrecognized Senders row, select Only if e-mail matches an Accepted Domain.
4. In the Accepted Domains field, enter the domain names for your clients, separating each domain name by a comma and then a space.
   - See Add Accepted Email Domains in Help Desk Manager and the tooltip for details on completing this field.
5. Click Save.

The Incoming Mail section provides additional options to filter e-mail. Using the Ignored Senders fields, you can deny email from senders who may be sending SPAM or other unwanted email. The Regular Expression Filters fields allow you to filter out email, based on specific criteria for the subject, body, content, or attachments.

Click the tooltips next to each option for more information about using these filters.

Ignore email received from specific email addresses

If you receive spam email from specific email addresses, you can add these addresses to the Ignored Senders list in HDM. When you are finished, HDM ignores or blocks email received from these email addresses.
1. Click Setup and select E-Mail > Options.

2. Under Incoming Mail, locate the Ignored Senders field.

   | Ignored Senders | postmaster@*, mailer@*, mailer-daemon@*, majordomo@*, *-admin |

3. Add the senders you want to ignore, adding a comma after each entry. Use an asterisk (*) for zero or more characters.
   
   For example:
   postmaster@*
   You can also use:
   *-admin@*
   
   This filter configures HDM to ignore email received from addresses such as:
   
   postmaster@example.com
   mailto:list-admin@example.com

4. Click Save.

Configure an outgoing email account

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

To prevent HDM from sending nonstop ticket updates, use a real email address. Do not use an alias.

Be sure to delete the sample outgoing server that was installed by default. The sample server may interfere with your SMTP server.

1. Click Setup and select E-Mail Outgoing Mail Accounts.

2. Click New.

3. In the SMTP Server field, enter the location of your SMTP server.
   
   For example:
   
   smtp.office365.com

4. In the Port field, enter the port of your SMTP server.
   
   Use default port 25 unless your SMTP server requires a specific port.

5. Select the SSL checkbox if required by your SMTP server.

6. Click Make Default to configure this account for sending all non-ticket email messages and any ticket messages for incoming mail accounts linked to the default.
   
   Otherwise, leave this field as is.

7. Enter a friendly name that displays in the From address for email sent by this SMTP server.

8. Enter a list of domains used by this account for all outgoing emails.

9. Enter any additional properties sent to the email provider for mail server with special needs.
   
   Click the tooltips for a list of supported parameters.

10. Click Save.
Configure an incoming email account

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

If required, you can change the frequency that HDM checks for new email.

1. Click Setup and select E-Mail > Incoming Mail Accounts.
2. Click New.
   A new incoming email account form displays.
3. Click Make Default to set this account as your default incoming mail account.
4. In the E-Mail Address field, enter the email address used by Help Desk Manager to create new tickets.
   To prevent HDM from sending nonstop ticket updates, use a real email address. Do not use an alias.
5. In the Account Type field, select the email protocol used to access the email account.
   If you select Exchange or Office 365, verify that Exchange Web Services is enabled on the Microsoft Exchange server. If the Exchange server does not support this service, enable the IMAP or POP3 protocol on the server.
6. Select the Compatibility Mode check box if you want to enable Help Desk Manager to download the full email from the email server rather than specific parts of the email.
   SolarWinds recommends leaving this check box blank.
7. In the Incoming Mail Server field, enter the email account used to send email to clients.
8. Click the Tech Group drop-down menu and select the tech group that filters the incoming email.
9. Click the Request Type drop-down menu and select the request type that will assign tickets created from this email account. The available request types in the drop-down menu reflects the groups supported by your Tech Group selection in the previous step.
   Ensure that the request type is supported by the selected tech group.
    If your email server fails incoming email tests, you can use these options for troubleshooting.
    Click the tooltips for more information.
11. Click Save.

Enable HDM to create tickets from incoming email

1. Log in to the Help Desk Manager Admin Console.
2. Click Setup > E-Mail > Incoming Mail Accounts.
3. Click the default email account.
4. Select the Enable E-Mail Tickets checkbox.
5. Verify that the administrator email address is correct.
6. In the User Name field, enter your administrator details in one of the following formats:
   - domain\admin
   - admin@domain.com

7. Verify that the Request Type option is correct.

   This is a required field. All tickets generated from email will always be created with the selected request type.

8. Click Save.

Troubleshooting connection issues

If you receive an error when you save your Exchange incoming email account, do the following:

1. Access your Exchange server and verify that Server Manager > Tools > Exchange Server IIS Manager > EWS > Basic Authentication is set to Enabled.
2. If SSL is enabled, ensure that your security certificate (self-signed or CA-issued) to the local Java's trusted certificates.
3. When you are finished, save the incoming mail email account again.

Configure an incoming e-mail account for Office 365

Beginning in October 2020, Microsoft will disable Basic Authentication for Exchange Web Services (EWS). This API allows you to access your Office 365 email, as well as other Exchange-related items. This authentication method requires a username and password to access your Exchange email.

If you use Office 365 for your incoming e-mail, create a new incoming e-mail account in HDM and link this account to a Microsoft Azure account. This method uses Modern Authentication, which implements Multi-factor Authentication (MFA), Open Authentication (OAuth) 2.0, and conditional access policies (such as Azure Active Directory Conditional Access) to access Exchange e-mail. This ensures that all e-mail correspondence between your Office 365 e-mail account and HDM is safe and secure from unauthorized access.

OAuth is an open-standard authorization protocol used by websites and applications to enable Internet users to access resources without providing a password. MFA is an authentication method that grants user access to a resource after they present two or more pieces of evidence (or factors) to an authentication mechanism—for example, a password and a secret code.

To configure a new incoming e-mail account for Office 365:

1. Verify your Exchange Online account settings.
2. Obtain an Azure account.
3. Register HDM as an application in Azure.
4. Create a new incoming e-mail account in HDM for your Office 365 e-mail.
Verify your Exchange Online account settings

Log in to your Exchange account and verify that Multi-factor Authentication for Office 365 is enabled. See Set up multi-factor authentication located on the Microsoft Docs website for details.

Obtain an Azure account

See the Microsoft Azure website located at azure.microsoft.com for details.

An Azure administrator account is not required.

Register HDM in Azure as an application

1. Log in to HDM as an administrator.
2. Click Setup > General > Options.
3. In the General Options page, record the server DNS name and assigned port.
   For example, record localhost and 8443.
4. Open a web browser and navigate to:
   https://portal.azure.com/#home
   Do not close HDM.
5. On the Home page under Azure services, click Azure Active Directory.
6. In the navigation pane under Manage, click App registrations.
7. Click the New registration tab.
8. Under Name, enter a display name for HDM.
   For example, Help Desk Manager.
9. Under Supported account types, select the Single tenant option.

Supported account types

Who can use this application or access this API?

- Accounts in this organizational directory only (semo265test only - Single tenant)
- Accounts in any organizational directory (Any Azure AD directory - Multitenant)
10. Under Redirect URI (optional), create a redirect URI in the following format using the HDM server DNS name and port number you retrieved in a previous step:

   https://<Server_DNS_Name>:<Port>/helpdesk/oath-redirect

   For example:

   https://localhost:8443/helpdesk/oauth-redirect

11. Save the application.

12. In the navigation pane, click App registrations.

13. Under Display name, click the Help Desk Manager application.

   The Help Desk Manager application details display.

14. Record the client and tenant ID values and save them to a text file.

15. In the navigation menu, click API Permissions.

16. Click Add a new permission.

17. Scroll down and click Exchange.

18. Select Delegated permissions, and then maximize EWS.

19. Under EWS, select:

   EWS.AccessAsUser.All

20. Remove any other pre-existing permissions from the remaining permission drop-down menus.

   When you are finished, you should have one permission.

21. In the navigation menu, click Certificates & Secrets.

<table>
<thead>
<tr>
<th>Client secrets</th>
</tr>
</thead>
<tbody>
<tr>
<td>A secret string that the application</td>
</tr>
<tr>
<td>New client secret</td>
</tr>
</tbody>
</table>

23. Under Add a client secret, select an expiration date.

24. (Optional) Enter a description.

25. Click Add.

26. At the bottom of the screen, locate the Password with the new client secret code.

27. Copy the client secret code to a text file.

⚠️ Store this text file in a safe location. This code is unique and cannot be retrieved when you close the window.

Create a new incoming e-mail account for your Office 365 e-mail

ℹ️ If required, you can change the frequency that HDM checks for new email.

1. In HDM, click Setup > E-Mail > Incoming Mail Accounts.

ℹ️ Do not close Azure.

2. Click New.

3. Select the E-Mail Account tab.

4. In the E-Mail Address field, enter the email address used by HDM to create new tickets.

<table>
<thead>
<tr>
<th>E-Mail Address</th>
</tr>
</thead>
</table>

⚠️ WARNING: Do not use a personal e-mail account for this setting as all messages will be processed and deleted. The helpdesk should have its own, empty account.

⚠️ To prevent HDM from sending nonstop ticket updates, use a real email address. Do not use an alias.

5. In the Account Type row, select Exchange/Office 365.
6. For Authentication Mode, select OAuth.

![Authentication Mode](image)

The Incoming Mail Server row displays the Office 365 option with three additional fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tenant ID</td>
<td>The ID number linked to your domain (such as solarwinds.com).</td>
</tr>
<tr>
<td>Client ID</td>
<td>The ID number that is unique for each registered Azure application (such as HDM).</td>
</tr>
<tr>
<td>Client Secret</td>
<td>The encrypted password generated by Azure.</td>
</tr>
</tbody>
</table>

7. Locate the text files that include the client ID, tenant ID, and the client secret values you saved from Azure.

8. Paste the values from your text files into the relevant fields in your new email account.

9. Click Authorize.

   You are redirected to the Microsoft Login page.

10. In the Pick an account dialog box, select your Azure account.

11. In the Permissions requested dialog box, review the permission requests from your HDM account. These requests may include:
   - Access your mailboxes
   - Sign you in and read your profile.
12. Click Accept.

If the authorization is successful, you are redirected back to the Incoming Mail Accounts page in HDM. Under Client Secret, Authorized displays with a green indicator. The new incoming mail account is linked with Azure.

<table>
<thead>
<tr>
<th>Incoming Mail Server</th>
<th>Office 365 ✅</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tenant ID</td>
<td></td>
</tr>
<tr>
<td>Client ID</td>
<td></td>
</tr>
<tr>
<td>Client Secret</td>
<td></td>
</tr>
<tr>
<td>Authorized</td>
<td>Re-Authorize</td>
</tr>
</tbody>
</table>

If the authorization is not successful and you receive an error, verify that the redirect URI you entered in Azure includes the correct server DNS and port listed in Setup > General > Options.

13. Click the Outgoing Mail Account drop-down menu and select your outgoing email account.

Outgoing Mail Account: smtp

This account is used to send e-mail for this account. This includes automated replies to e-mail sent to this account, or tickets with a request type that matches what is linked to this account.

14. Click the Tech Group drop-down menu and select the tech group used to filter the available request types below.

Tech Group:        

New tickets created from this Office 365 email account will be given the selected request type.

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

Request Type:      

Ensure that the request type is supported by the selected tech group.

16. Leave the Allow Auto-submitted E-Mail check box and Advanced E-Mail Properties field blank.

Allow Auto-Submitted E-Mail

If your email server fails incoming email tests, you can use these options for troubleshooting.

17. Disable your current incoming e-mail account (if applicable).

18. Click Enable E-Mail Tickets.
19. Click Save. The Mailer Daemon begins parsing your Office 365 e-mail to your new incoming e-mail account.

**Troubleshooting connection issues**

If you receive an error when you save your Exchange incoming email account, do the following:

1. Access your Exchange server and verify that Server Manager > Tools > Exchange Server IIS Manager > EWS > Basic Authentication is set to Enabled.
2. If SSL is enabled, ensure that your security certificate (self-signed or CA-issued) to the local Java's trusted certificates.
3. When you are finished, save the incoming mail email account again.

**Apply your email templates**

Email templates create reusable text for outgoing and incoming email from data in Help Desk Manager tickets. These templates implement tags (such as first name, last name, and ticket number) to pull information from tickets into emails.

See [Apply tags in email templates](#) for a complete list of tags.

You can apply email templates and tags that automate your email processes, such as:

- Ticket update emails
- Action rule emails
- Other general emails that require information from tickets

You can use the built-in templates included with Help Desk Manager or you can create your own custom templates.

**Built-in email templates**

Help Desk Manager includes ready-to-use, built-in email templates for ticket-related outgoing and incoming emails. You can use these templates or customize them to fulfill your needs.

For information about using built-in templates, see [Edit built-in email templates](#).

**Outgoing email templates**

The following table lists the outgoing email templates included with Help Desk Manager.

<table>
<thead>
<tr>
<th>TEMPLATE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>SMS Message</td>
<td>Creates the body portion of all SMS messages.</td>
</tr>
<tr>
<td>New Account Message</td>
<td>Creates the message sent to a client when you create their Help Desk Manager account.</td>
</tr>
<tr>
<td>Validate Email Message - New</td>
<td>Creates the message sent to clients when they create a new account.</td>
</tr>
<tr>
<td><strong>Template</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Account</td>
<td>To enable this template, the Require E-Mail Validation check box must be selected in the Client Options screen at Setup &gt; Clients &gt; Options.</td>
</tr>
</tbody>
</table>
| Validate Email Message - Existing Account | Creates the message sent to clients when they change their email address on an existing account.  
The Require E-Mail Validation check box must be selected in the Client Options screen at Setup > Clients > Options to enable this template.                                                                                                     |
| Reset/Forgot Password Message   | Creates the message sent to clients when they click Forgot Password on the login screen or a tech clicks Reset Password in the Client Info panel for a specific client.  
To enable this template, the Require E-Mail Validation check box must be selected in the Client Options screen at Setup > Clients > Options.                                                                                                    |
| Unrecognized E-mail Reply       | Creates the plain-text reply to Help Desk Manager email that does not match a Client or Tech account.  
To enable this template, the Client Can Create Account setting must be set to No or Only if Client's e-mail matches an Accepted Domain in the Client Options screen at Setup > Clients > Options.               |
| Unauthorized Update E-mail Reply| Creates the plain-text reply to email from a Tech who is not authorized to change the status of a ticket.  
Techs are not authorized if they are not an admin or their assigned tech permission located at Setup > Tech > Tech Permissions is not configured appropriately.                                                                                                                  |
| Unauthorized Status Change E-mail Reply | Creates the plain-text reply to email from a Tech or Client not authorized to change the status of a ticket.  
Techs are not authorized if they are not an admin or their assigned tech permission configured at Setup > Tech > Tech Permissions is not configured appropriately.                                                                                                    |
| Disabled Account Reply          | Creates the plain-text reply to an email from a client whose Customer is disabled.  
Help Desk Manager also uses this template if the Require E-Mail Validation check box is selected in the Client Options screen at Setup > Clients > Options but clients are not authenticated with their e-mail address.                                                                 |
| Default Ticket Greeting         | Creates the message greeting in response to tickets where the Status Type and Request Type do not match any other configured template.                                                                                                                                       |
| Overdue Assets Message          | Creates the message greeting in response to clients with one or more checked-out Devices that are overdue.                                                                                                                                                                      |
| Closed Ticket Greeting          | Creates the message greeting when tickets are closed.                                                                                                                                                                                                                   |
## Template Description

<table>
<thead>
<tr>
<th>Template</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Ticket Greeting</td>
<td>Creates the message greeting when tickets are opened.</td>
</tr>
<tr>
<td>Resolved Ticket Greeting</td>
<td>Creates the message greeting when tickets are resolved.</td>
</tr>
</tbody>
</table>

### Incoming email templates

The following table lists the incoming email templates included with Help Desk Manager.

<table>
<thead>
<tr>
<th>Template</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message Body When Adding a Client Note</td>
<td>Creates the default message for email opened by clicking the Add Note action link in an email from Help Desk Manager.</td>
</tr>
<tr>
<td></td>
<td>This setting only addresses client email.</td>
</tr>
<tr>
<td>Message Body When Canceling a Ticket</td>
<td>The default message for email opened by clicking the Cancel Ticket action link from an email sent by Help Desk Manager.</td>
</tr>
<tr>
<td></td>
<td>This setting only addresses client email.</td>
</tr>
<tr>
<td>Message Body When Confirming a Resolved Ticket</td>
<td>Creates the default message for email opened by clicking the Yes action link in an Help Desk Manager email sent when a Ticket status is changed to Resolved.</td>
</tr>
<tr>
<td></td>
<td>This setting only addresses client e-mail.</td>
</tr>
<tr>
<td>Message Body When Rejecting a Resolved Ticket</td>
<td>Creates the default message for email opened by clicking the No action link in an Help Desk Manager email sent when a Ticket status is changed to Resolved.</td>
</tr>
<tr>
<td></td>
<td>This setting only addresses client email.</td>
</tr>
</tbody>
</table>

### Template layout

Each built-in template includes a detailed description of its purpose and the text and tags included with the template.

Below is an example of a typical email template configuration page for SMS messages.
Edit built-in email templates

Built-in templates are pre-configured and ready to use for your Help Desk Manager deployment. You can modify the tags and text in the templates so your Help Desk Manager installation is able to send custom emails.

If you need to modify a built-in template, you can:

- Modify the information that appears in the resulting email by moving, adding, or removing the text and tags available for that template. See Apply email tags for a complete list of tags available for all email templates.
- Add a language other than standard English.
- Apply an email footer you have already defined in Setup > Email > Options.

The following procedure describes how to customize an outgoing built-in template called Unrecognized E-Mail Reply.

Help Desk Manager uses this template to send replies received from clients who submitted a request using an unrecognized email address. The goal for this example is to have the resulting emails reflect the actual name of the help desk.

1. In the toolbar, click Setup and select Email > Templates.
2. Select the Outgoing Mail tab.
3. In the E-mail Template column select Unrecognized E-mail Reply.
4. In the Subject field, change:
   
   ERROR: Your support request could not be processed.
   
   to
   
   <helpdesk_name> cannot process your request.
5. In the Template field, change the existing default message:
   
   We're sorry. Your e-mail address was not recognized by the help desk, so your request for support could not be submitted.
   
   to
   
   We're sorry. <helpdesk_name> does not recognize your email address and cannot process your request.
6. Click Save.

Create new email templates

This procedure describes how to create a new outgoing template for emails that Help Desk Manager sends to clients who opened accepted trouble tickets.

1. In the toolbar, click Setup and select Email > Templates.
2. Select the Outgoing tab.
3. Click New to open a blank template.
4. In the Name field, enter a name for the template.
   For example:
   Open Ticket Acknowledgment

5. In the optional Description field, enter a description that indicates when your help desk personnel should apply this template. Explain the purpose and reason for using this template.
   For example,
   Use this template for emails sent to clients who opened tickets requiring IT support only - no HR or Facilities requests.

6. In the Template field, enter the customer correspondence to include in the email.
   Because the purpose of this template is to acknowledge that the client's new ticket is being addressed in your help desk system, include information such as:
   - Client name or login ID
   - Ticket number
   - Help Desk name
   - Help Desk contact person (such as a tech or admin)
   - How the client can obtain their ticket status
   You can automate most of this information using tags, which act as placeholders for information available in your tickets. The blue box at the bottom of the Template field labeled Tags offers a partial list of tags you can use.
   See Apply tags in email templates for a complete list of available tags.
   Below is an example of your completed email template.

   ![Template example]

7. In the Status Type field, select Open.

   Selecting Open addresses an email that is sent when a ticket is opened. If Open is not displayed in the drop-down list, another email template might be assigned to this status type.

8. In the Request Types field, select Specific.
9. Select the appropriate request types.

Help Desk Manager includes the following request types:
- Email or Outlook
- Facilities
- Hardware
- HR
- IT General or Other
- Network
- Phone or Voicemail
- Printer or Toner
- User Administration

To enable the template to apply to all open ticket greeting emails, select All. The template is applied to all default and custom-created request types.

10. (Optional) Select the Use Email Footer check box to include the footer as defined in Setup > E-Mail > Options > E-Mail Footer, with this template.

When completed, your template is configured with your new selections, as shown below.

11. Click Save.

12. Skip the Other Languages field if you are creating a template in United States English.

If your client requires emails in another language, click Add to select the client's language and then design your template. When you finish, click Save.

The option lists more than 100 languages, including variants of English and other languages.

**Apply your tags in email templates**

Tags are placeholders in email templates that auto-populate emails with ticket information for general action rule emails. Help Desk Manager replaces these placeholders with their proper values (based on values in client tickets) once the email is generated. The tickets contain information types defined in the Setup pages for areas such as tickets, clients, techs, and processes.

The following table provides a list of tags for any type of Help Desk Manager email template. Because these tags are hard coded into Help Desk Manager, they cannot be edited.

When you add tags to an email template, use the tag syntax as it is shown in the table below. The content (such as tech, email, and client) must be entered between right and left facing angle brackets (such as <client>).

<table>
<thead>
<tr>
<th>TAG</th>
<th>INFORMATION PULLED FROM TICKET</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;ticket_url&gt;</td>
<td>The URL where the ticket resides.</td>
</tr>
<tr>
<td>&lt;login_url&gt;</td>
<td>The URL for logging in to access a ticket.</td>
</tr>
<tr>
<td>&lt;ticket_ID&gt;</td>
<td>The Help Desk Manager ticket ID number.</td>
</tr>
<tr>
<td>Tag</td>
<td>Information Pulled from Ticket</td>
</tr>
<tr>
<td>--------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>&lt;request_type&gt;</td>
<td>The ticket request type. A request type defines the trouble area. For example, Email/Outlook, Network, Printer/Toner, or User Administration.</td>
</tr>
<tr>
<td>&lt;status_type&gt;</td>
<td>The ticket status indicating the ticket's state of completion. The ticket status can be Open, Closed, Pending, Canceled, or Resolved.</td>
</tr>
<tr>
<td>&lt;priority_type&gt;</td>
<td>The ticket priority type that determines the ticket due date. The default priorities include Urgent, High, Medium, and Low.</td>
</tr>
<tr>
<td>&lt;client&gt;</td>
<td>The client's first and last name.</td>
</tr>
<tr>
<td>&lt;client_short&gt;</td>
<td>The abbreviated version of the client name. Use this tag to minimize space, such as in lists.</td>
</tr>
<tr>
<td>&lt;client_phone&gt;</td>
<td>The phone number of the client who submitted the ticket.</td>
</tr>
<tr>
<td>&lt;client_email&gt;</td>
<td>The email address of the client who submitted the ticket.</td>
</tr>
<tr>
<td>&lt;assigned_to&gt;</td>
<td>The name of the tech assigned to the ticket.</td>
</tr>
<tr>
<td>&lt;assigned_to_short&gt;</td>
<td>The abbreviated version of the tech name assigned to the ticket.</td>
</tr>
<tr>
<td>&lt;tech&gt;</td>
<td>The tech's first and last name.</td>
</tr>
<tr>
<td>&lt;tech_short&gt;</td>
<td>The abbreviated version of the tech's name. Use this tag to minimize space, such as in lists.</td>
</tr>
<tr>
<td>&lt;tech_phone&gt;</td>
<td>The tech's phone number.</td>
</tr>
<tr>
<td>&lt;tech_email&gt;</td>
<td>The tech's email address.</td>
</tr>
<tr>
<td>&lt;company&gt;</td>
<td>The company associated with the ticket.</td>
</tr>
<tr>
<td>&lt;Customer&gt;</td>
<td>The Customer of an asset in a ticket.</td>
</tr>
<tr>
<td>&lt;subject&gt;</td>
<td>The subject of the ticket.</td>
</tr>
<tr>
<td>&lt;report&gt;</td>
<td>The request detail information.</td>
</tr>
<tr>
<td>&lt;due_datetime&gt;</td>
<td>The estimated ticket completion date and time.</td>
</tr>
<tr>
<td>&lt;scheduled_worktime&gt;</td>
<td>The scheduled date and time to complete work on the ticket.</td>
</tr>
<tr>
<td>&lt;worktime&gt;</td>
<td>The time spent working on the ticket.</td>
</tr>
<tr>
<td>&lt;first_initial&gt;</td>
<td>The first letter of the client's first name.</td>
</tr>
<tr>
<td>&lt;last_name&gt;</td>
<td>The client's last name.</td>
</tr>
<tr>
<td>&lt;last_initial&gt;</td>
<td>The first letter of the client's last name.</td>
</tr>
<tr>
<td>TAG</td>
<td>INFORMATION PULLED FROM TICKET</td>
</tr>
<tr>
<td>------------------</td>
<td>------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>&lt;email&gt;</td>
<td>The client's email address.</td>
</tr>
<tr>
<td>&lt;last_name&gt;</td>
<td>The client's last name.</td>
</tr>
<tr>
<td>&lt;helpdesk_contact_info&gt;</td>
<td>The Help Desk Manager contact information.</td>
</tr>
<tr>
<td>&lt;helpdesk_name&gt;</td>
<td>The name of the help desk installation.</td>
</tr>
<tr>
<td>&lt;custom_x&gt;</td>
<td>The ticket custom field, where $x$ represents a custom field ID.</td>
</tr>
</tbody>
</table>

See [Apply email templates](#) for information about using tags in templates.

### Set up the tickets

Clients and techs create tickets, either through the Help Desk Manager user interface or through email, and use tickets to correspond to each other.

The Tickets tab in the left menu defines ticketing functions, such as how tickets are generated, routed, updated, and closed.

These functions include:

- Configure ticket options
- Define request types
- Define status types
- Set priority types and alerts
- Create custom fields for tickets
- Create tasks

When a client or tech creates a ticket, they select a request type that determines which custom fields display on the ticket and which techs can be assigned to it. The request type also determines how the ticket is routed to a tech.

Each ticket is assigned a status and a priority. The status indicates the ticket's stage of completion (for example, Open, Acknowledged, Resolved, or Closed) and determines whether time should be counted against the ticket while in that stage.

The priority determines the ticket due date. Each priority can be configured with three alert levels to warn techs when a ticket needs attention.

Tasks facilitate how tickets are automatically created. A task contains one or more task elements, each of which provides settings for a new ticket.

When the task runs, a ticket is created for each task element, either sequentially or all at once, depending on how the task has been configured.

Tasks can be run manually or automatically at given intervals.
You can group identical tickets together to troubleshoot and resolve all tickets as one service request. See parent/child service relationships for more information.

**Configure ticket options**

You can configure your ticket contents, generation, and ticket access options on the Options page located at Setup > Tickets > Options.

Help Desk Manager categorizes all ticket options into three areas:

- General Options
- Client Options
- Tech Options

To configure your ticket options:

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

<table>
<thead>
<tr>
<th><strong>OPTION</strong></th>
<th><strong>DESCRIPTION</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Use Subject Field</td>
<td>Enables clients and techs to view the Subject field about the Request Detail field.</td>
</tr>
<tr>
<td>Default Priority</td>
<td>Selects the default priority type assignment for new tickets.</td>
</tr>
<tr>
<td>Lookup Clients By</td>
<td>Selects the attribute used for looking up clients when assigning them to tasks and parts.</td>
</tr>
<tr>
<td>Attachments Enabled</td>
<td>Enables techs and clients to attach files to tickets using the HDM interface or by attaching files to e-mail. Deselect the checkbox to prevent attachments sent by e-mail to be saved with the ticket. Their presence will be indicated in the ticket report.</td>
</tr>
<tr>
<td>Room Required</td>
<td>Prevents HDM from accepting tickets without an assigned room.</td>
</tr>
<tr>
<td>Room Field Style</td>
<td>Enables room selection using a pop-up menu or entering the room name in a text field. If you defined all available rooms in your organization, select Pop-up Menu to ensure you can select a valid room. You can define all rooms at Setup &gt; Locations &amp; Departments &gt; Locations &amp; Rooms &gt; [Location] &gt; Rooms Editor.</td>
</tr>
<tr>
<td>Enter Work Time As</td>
<td>Indicates whether techs can select rooms using a popup menu or by entering the room in a text field.</td>
</tr>
<tr>
<td>Allow Non-User CC Updates</td>
<td>Allows ticket updates by e-mail from people who are not HDM users but are Cc or Bcc recipients in the ticket update e-mail.</td>
</tr>
</tbody>
</table>
4. Review and update settings in the Client Options section, including how clients can create tickets and who can update the priority.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Required</td>
<td>Requires a ticket to be assigned to a client before it is saved.</td>
</tr>
<tr>
<td>Clients Can Create Tickets Using</td>
<td>Enables clients to create tickets using the HDM interface or e-mail. If both options are disabled, clients can only view or update existing tickets. All new tickets must be created by a tech.</td>
</tr>
<tr>
<td>Client Priority Option</td>
<td>Enables all clients and client admins (both location and department) to set up their ticket priority level. If you select None, new tickets are assigned the Default Priority setting.</td>
</tr>
<tr>
<td>Clients can Cc: E-mail</td>
<td>Enables clients to carbon copy e-mail tickets to additional e-mail addresses.</td>
</tr>
<tr>
<td>Allow User Lookup</td>
<td>Auto completes the Cc: field as you type with suggested users from the Help Desk Manager database. The Clients can Cc: E-mail checkbox must also be selected. This option exposes e-mail addresses to clients. Leave this option disabled if client email addresses should be kept secret. Tech email addresses will be hidden according to the Show Tech E-Mail Addresses to Clients setting.</td>
</tr>
<tr>
<td>Show Tech E-Mail Addresses to Clients</td>
<td>Enables tech e-mail addresses to display in the client interface and in e-mail sent by Help Desk Manager to clients.</td>
</tr>
<tr>
<td>Show Scheduled Date to Clients</td>
<td>Enables clients to view the time scheduled for ticket work to be completed through e-mail or the Help Desk Manager interface.</td>
</tr>
<tr>
<td>Show Estimated Due Date to Clients</td>
<td>Enables clients to view the estimated ticket due date and time in e-mail or the Help Desk Manager interface.</td>
</tr>
<tr>
<td>Lock Ticket to Client Location</td>
<td>This option is disabled in Help Desk Manager.</td>
</tr>
<tr>
<td>Update Ticket Location / Room / Department when Client Changes</td>
<td>Ensures that the location, room, and department is updated to match the values assigned to the new client (if any) when the assigned client changes for any reason. The priority type is updated to match the new location.</td>
</tr>
<tr>
<td>Include Room Assets in Client Asset List</td>
<td>Presents the client with a list of all assets in their room. Deselect this option to allow the client to view only assets assigned to them.</td>
</tr>
<tr>
<td>Ticket Must Use Assigned Asset</td>
<td>Restricts clients to choose only their assigned Devices when creating a ticket.</td>
</tr>
<tr>
<td>OPTION</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Deselect this option to enable clients to enter model information for an asset that is not on their assigned list.</td>
<td></td>
</tr>
</tbody>
</table>
| Asset Number Lookup for Client         | Enables a client to search for an asset to associate with a ticket by entering the asset number in a text field when they submit the ticket.  
This option is based on whether clients can choose an asset based on the Model Required setting of the request type selected for a ticket. |
| Note Collapsing Threshold for Clients  | Indicates the number of ticket notes displayed to a client before a "More..." link is added at the bottom of the Notes field.  
In the Help Desk Manager interface, the "More..." link exposes any hidden notes.  
In an e-mail, the link returns the client to the web interface to view the hidden notes. |
| Auto-Reply to Client                   | Indicates the actions taken by a client to invoke an automatic e-mail confirmation.  
This applies to the client (assigned client or Cc client) currently updating the ticket. |
| Enable Cancellation By Client          | Indicates under which conditions a Cancel option is available to the client in the Help Desk Manager interface and e-mail ticket display. |
5. Review and update settings in the Tech Options section.

<table>
<thead>
<tr>
<th><strong>OPTION</strong></th>
<th><strong>DESCRIPTION</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Tech Note Visibility</td>
<td>Enables tech notes to be visible or hidden to clients by default. You can override this setting for each tech note.</td>
</tr>
<tr>
<td>Print View Note Visibility</td>
<td>Enables which note types are displayed in the Ticket Detail Print View and Tickets PDF download.</td>
</tr>
<tr>
<td>Note and History Sorting</td>
<td>Selects the ticket sorting order in the Ticket Details tab.</td>
</tr>
</tbody>
</table>
| Default Setting for E-Mail Recipients (No Tech Group) | Selects the default setting for the E-Mail Recipients attribute of new tickets, which is visible in the Ticket Details editor. The E-Mail Recipients setting determines which users associated with a ticket receive an e-mail when action is made by a Tech.  <br>  
  See this [KB article](#) for additional details on configuring this option.                                                                                                                                         |
<p>| Default Ticket Editor Button                    | Enables the Save or Save &amp; Email button to display as default in the Ticket Details tab.                                                                                                                                                                                                                                                      |
| E-mail Delete Confirmation                      | Sends an e-mail to the assign tech or tech group to confirm a ticket deletion. This setting overrides the Tech checkbox in the ticket.                                                                                                                                                                                                              |
| Limit Assigned Tech to Current Level            | Limits the available techs in the Assigned Tech drop-down menu on the Ticket Details tab to techs that are in the current ticket tech group level.                                                                                                                                                                                                  |
| When an attempt is made to edit a Ticket already being edited in another session | Selects the action taken when a ticket is edited by more than one tech at the same time in separate sessions. Select Allow to allow multiple users to edit a ticket at the same time without any warning. Select Warn to display an alert message when you edit a ticket that is being edited. Select Block to allow only one user to edit a ticket at a time.                                                                 |
| Enable Ticket E-Mail Overrides                  | Enables three new settings in the Recipients section of the ticket editor that provide options for overriding email settings elsewhere in HDM.                                                                                                                                                                                                     |
| Automatically Delete Obsolete Custom Fields      | When selected, custom fields rendered obsolete (for example, by changing the request type of a ticket to one that doesn't support those custom fields) are removed from the ticket, regardless of whether they have a value.                                                                                                                                                     |</p>
<table>
<thead>
<tr>
<th>OPTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Otherwise, the empty obsolete fields are automatically removed. Deleted custom fields that are not empty are noted in the Ticket History.</td>
</tr>
</tbody>
</table>

6. Click Save.

Define request types

Request types are used to categorize tickets. The request type definition specifies which users can create this type of ticket and what fields are included on the ticket.

Request types also define what type of issue the customer is experiencing and what action needs to be taken. When a user opens a ticket, they must choose a request type.

Request types can be defined as parent and child types. For example, when a user requests a password reset, you can configure the parent type as IT Software Assistance and the child type as Password Reset. You can define the types of tickets your help desk services support in the Request Types screen.

To begin, build your parent types first and then add your corresponding child types. If you build a child type before you build the parent type, you cannot set the child type as a child.

1. Log in to Help Desk Manager as an administrator.
2. In the toolbar, click Setup and select Tickets > Request Types.
   The Request Types window displays current request types.
3. Click New.
4. Enter a name to identify this request type.

![Request Type: New Hire Paperwork](image)

5. To create a nested request type, select the parent type. Optionally, click to copy values for the remaining fields from the parent type.
   To create a top-level request type, leave this field blank.

![Parent Type: HR](image)

6. Select the tech group that will handle this type of request.
   If the tech group is not defined, leave this field blank. You can map the request type to a tech group when you define the tech group.

![Tech Group](image)
7. Specify the default priority and whether fields are hidden or required.

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

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

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

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

10. Specify whether the user will be prompted to select an asset or model when they create this type of ticket.

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

<table>
<thead>
<tr>
<th>Companies</th>
<th>All</th>
<th>Specific</th>
</tr>
</thead>
<tbody>
<tr>
<td>Locations</td>
<td>All</td>
<td>Specific</td>
</tr>
</tbody>
</table>

12. To include custom fields on this type of ticket, specify which fields to include.

13. Specify whether clients can attach files to this type of ticket, and whether this request type is available as a category when techs create an FAQ.

```
The Attachments Enabled option does not affect whether techs can attach files.
```

14. Identify the tech who will receive the highest level escalation (after the tech group manager).
15. Select the survey that is sent to clients when this type of ticket is closed, or select None to disable surveys for this ticket type.

16. Click Save.

Set the request types for techs and key personnel

You may have request types that require unique restrictions for key personnel, such as techs and HR. For example, in the HR department, you may need to have a Reset Password request type in your HR department, which should only be available to the IT helpdesk personnel in the HR department. You can enable these for your personnel.

1. Log in to Help Desk Manager as an administrator.
2. Click Setup > Companies and Locations > Departments.
3. Click New.
4. Complete the form to add a new department.
   a. Enter a department name. For example, HR.

   ```
   Department Name: HR
   ```
   b. Enter a phone number.

   ```
   Phone: 
   ```
   c. Select the default client admin permissions.

   ```
   Default Client Admin Permissions:
   ```
   ```
   Client Admin Ticket Permissions
   Client Admin Can Report for Others
   Copy Admin on Ticket Updates
   Cost Visible to Admin
   Create Reservations for Others
   ```
   d. Complete the remaining fields as required, and then click Save.
5. Under Companies and Locations, click Department Groups.
6. Click New.
7. Complete the Group Name form.
   a. Enter a group name. For example, Helpdesk.

   ```
   Group Name: Helpdesk
   ```
   b. Select a group manager.

   ```
   Group Manager: Admin, Joe
   ```
   c. Click Save.
8. Click the Assigned Techs tab in the form.
9. Click Edit.
10. Select the required technicians, and click Save.
The assigned techs display in the form.

<table>
<thead>
<tr>
<th>Group Name</th>
<th>Assigned Departments</th>
<th>Assigned Techs</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tech Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kim Allen</td>
</tr>
<tr>
<td>Edmund Barton</td>
</tr>
</tbody>
</table>

11. Click Tickets > Request Types.
12. Click New.
13. Update the new Request Types form.
   a. In the Request Type field, enter Reset Password.
      ![Request Type](image1)
   b. Click the Parent Type drop-down menu and select Helpdesk.
      ![Parent Type](image2)
   c. In the Departments field, select Specific.
      ![Departments](image3)
   d. In the Selected Departments field, select the HR checkbox.
   e. Complete the additional fields and selections as required.
14. Click Save.

**Archive a request type**

Prior to Help Desk Manager 12.6, you could hide a request type from clients by creating a non-existing department and assigning the targeted request type to this department. Another option was to delete the request type, but this method can corrupt your historically-assigned tickets.

Beginning in Help Desk Manager 12.6, you can archive a request type in the Help Desk Manager Administrator Console. After you archive the request type, the request type and all associated tickets are hidden from clients and techs.

When an administrator generates a report, the request type and associated ticket information are included in the report. However, the archived ticket data does not display in the dashboard widgets.

Use this feature to:

- Purge Help Desk Manager of outdated request types
- Prevent techs from assigning tickets to an archived request type
- Prevent clients from assigning help requests to an archived request type
To archive a request type:

1. In the toolbar, click Setup and select Tickets > Request Types.
   The Request Types window displays the current request types.
   
   ![Request Types window]

   
   2. In the Archived column, select the checkbox for the request type you want to archive.
   3. Click Save.
      The request type is no longer available in the Help Desk Manager console options.

Remove a request type from an archive

1. In the toolbar, click Setup and select Tickets > Request Types.
   The Request Types window displays the current request types.

2. In the Archived column, select the checkbox for the request type you want to remove from an archive.
   
   ![Warning message]

3. Click Save.
   The request type is available in the Help Desk Manager console options.

Define status types

Each ticket is assigned a status from the available status types. The following status types are predefined:

- Open
- Closed
- Canceled
- Resolved
Create a priority type

You can use Help Desk Manager to automate ticket workflows. For example, you can automatically change a ticket's priority type.

In the following example, a Critical priority type is created. In the next topic, the Critical priority type will be used in an action rule that changes all tickets submitted by the CEO to Critical.

1. Click Setup.
2. Select Tickets > Priority Types and Alerts.
3. Click New.
4. Enter a name, and select a display order and color.
5. (Optional) In the Due Time field, select the time when tickets with this priority should be closed.
6. (Optional) In the Client Reminder Interval field, select the amount of time to elapse before sending (or resending) a reminder to clients.
7. (Optional) In the Alert Repeat Interval field, select the amount of time between reminders to trigger an alert.
8. Click Save.
9. (Optional) In the Alert Level rows, set the conditions (such as time interval, criteria, and email recipients) for each Alert Level, beginning with Alert Level 1 and ending with Alert Level 3.
10. Click Save.

Create custom ticket fields

Use the Ticket Custom Fields screen to create custom tickets fields for your request types. After you create your custom ticket fields, you can attach one or more custom fields to a request type.

When you open a new ticket and select a request type, any custom fields attached to that request type display in the ticket under Custom Fields. The custom field can be hidden, visible, editable, or required for techs or clients based on your needs.

You can add a pop-up message to the custom field by entering message text in the Info field. When you add text to this field and click Save, an Information icon displays in the custom field. When a tech or client (based on your assigned permissions) clicks this icon, the pop-up message displays next to the field.

<table>
<thead>
<tr>
<th>Custom Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of toner cartridges</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Status &amp; Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter the number of required toner cartridges.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Recipients</th>
</tr>
</thead>
</table>

The Information icon displays next to each custom field in the Ticket Custom Fields window that is configured with a pop-up message.
The following table lists all custom fields you can add to your tickets. These custom fields display under Custom Fields in the ticket.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Text</strong></td>
<td>Creates a text box for 80 characters and up to 15 lines of text.</td>
</tr>
<tr>
<td></td>
<td>For example, you can create a custom text field called Additional Notes and attach the custom field to any request type so a tech or client can add additional ticket information.</td>
</tr>
<tr>
<td></td>
<td><img src="custom_fields_text.png" alt="Custom Fields" /></td>
</tr>
<tr>
<td><strong>Numbers</strong></td>
<td>Creates a text box for 80 characters and up to 15 lines of text or numbers.</td>
</tr>
<tr>
<td></td>
<td>For example, you can create a custom number field called Toner Cartridges and attach the custom field to the Printer/Toner request type so the tech or client can indicate how many toner cartridges are requested.</td>
</tr>
<tr>
<td></td>
<td><img src="custom_fields_numbers.png" alt="Custom Fields" /></td>
</tr>
<tr>
<td><strong>Currency</strong></td>
<td>Creates a text box for 80 characters and up to 15 lines of text or numbers.</td>
</tr>
<tr>
<td></td>
<td>For example, you can create a custom currency field called Estimated Cost and attach the custom field to a Hardware request type. This provides a quick reference for any hardware costs included with the ticket.</td>
</tr>
<tr>
<td></td>
<td><img src="custom_fields_currency.png" alt="Custom Fields" /></td>
</tr>
<tr>
<td><strong>Date</strong></td>
<td>Creates a calendar field to add a date to the ticket.</td>
</tr>
<tr>
<td></td>
<td>For example, you can create a custom date field called Target Date to identify the date when a task in the ticket must be completed.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Label</th>
<th>Type</th>
<th>Clients: Hidden</th>
<th>Visible</th>
<th>Editable</th>
<th>Req’d</th>
<th>Tech: Hidden</th>
<th>Visible</th>
<th>Editable</th>
<th>Req’d</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional Notes</td>
<td>Text</td>
<td>•</td>
<td></td>
<td>•</td>
<td>•</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of toner cartridges</td>
<td>Number</td>
<td>•</td>
<td></td>
<td>•</td>
<td>•</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Estimated Cost</td>
<td>Currency</td>
<td>•</td>
<td></td>
<td>•</td>
<td>•</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date/Time</td>
<td>Creates a field with a calendar and time drop-down menus so you can add a date and time to the ticket. For example, you can create a date and time field called Delivery Date and Time and attach the custom field to a Facilities request type. This field can indicate when equipment will be delivered to the customer.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time Period</td>
<td>Creates a field with days and hours drop-down menus under Custom Fields to add the elapsed time and minutes. For example, you can create a time period custom field called Time On Site and attach the field to the Facilities request type to indicate the amount of time you spent at the customer site.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multiple Choice</td>
<td>Creates a field with one or more checkboxes. The user can select one or more options. For example, you can create a multiple choice custom field called Select An Option and list each option in a text file separated by a semicolon. When you select and upload the text file in the Ticket Custom Fields window and click Save, the options display in the Options field.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single Choice</td>
<td>Creates a field with one or more radio buttons. The user can only select one option.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**FIELD** | **DESCRIPTION**
---|---
For example, you can create a single choice custom field called Select An Option and list each option in a text file separated by a semicolon. When you select and upload the text file in the Ticket Custom Fields window and click Save, the options display in the Options field.  

<table>
<thead>
<tr>
<th>Custom Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select An Option</td>
</tr>
</tbody>
</table>

If you want to include one option (for example, Yes or No), enter the option text in the Option field. Point your mouse arrow over Options for details.

**Popup Menu**

Creates a field with one or more options in a drop-down menu. The user can only select one option.

For example, you can create a single choice custom field called Select An Option and list each option in a text file separated by a semicolon. When you select and upload the text file in the Ticket Custom Fields window and click Save, the options display in the Options field.

<table>
<thead>
<tr>
<th>Custom Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select An Option</td>
</tr>
</tbody>
</table>

If you want to include one option (for example, Yes or No), enter the option text in the Option field. Point your mouse arrow over Options for details.

**To create a custom ticket field:**

1. Click Setup.
2. Select Tickets > Ticket Custom Fields.
3. Click New.
   
   The Ticket Custom Fields screen displays the default values for a new custom field.
4. Enter a label to identify this field.

   | Label | Start Date |
   
5. To accept the default options, go to step 12. Otherwise, go to step 6.
6. In the Display Order drop-down menu, select this field's position within the Custom Fields section of a ticket.

   | Display Order | 1 |
7. In the Clients and Techs sections, specify whether each group can see or edit the custom field.

   Techs with admin accounts can edit all custom fields.

<table>
<thead>
<tr>
<th></th>
<th>Hidden</th>
<th>Visible</th>
<th>editable</th>
<th>Req'd</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clients</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Techs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

8. Select the Type of input this field will accept.

   Type: Date

   The remaining fields change based on your selection. Mouse over the selections for details.

9. In the Info field, enter a description, and then select whether the field is searchable or excluded from e-mail. Hover over each option for details.

   **Info:** The new employee's first day of work.

   - **Searchable**
   - **Exclude From E-mail**

   Searchable
   Indicates whether this field will appear as a search option from the Advanced Search page.

10. Click the Display Order drop-down menu and select the position where this option is listed in the Custom Fields list.

    For example, to display this selection as the first option in the Custom Fields list, select 1.

   **Display Order:** 1

11. Select the display options for clients and techs. For example, if this field is a required custom field option for tech and client tickets, select Req'd for both options.

<table>
<thead>
<tr>
<th></th>
<th>Hidden</th>
<th>Visible</th>
<th>Editable</th>
<th>Req'd</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clients</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Techs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

12. Click Save.

    The Request Types field and an Edit link is displayed on the Ticket Custom Fields screen.
13. Specify which request types apply to this custom field. Only tickets with the selected request type will display this field.
   a. Click the Edit link. A new tab displays a list of request types.
   b. Select one or more request types. To display the custom field on all tickets, click Select All below the list.

   ![HR • New Hire Papework]

   c. Click Done to close the tab.

14. Click Save.

Verify the custom field

1. Click Tickets > New Ticket.
2. In the Client Info tab, locate and select a client.
3. Click the Ticket Details tab.
4. In the Request Type drop-down menus, choose the request type that includes your custom field.
5. Complete the remaining ticket fields, and click Save.
6. Close and then reopen the ticket.
7. Scroll down to Custom Fields.

   Start Date displays as the first option because the display order is set to 1.

![Custom Fields]

Edit the custom field

1. Click Setup > Tickets > Ticket Custom Fields.
2. In the Label column, locate and click the custom field you want to edit.
3. Edit the field as required. Click the Help for details.
4. Click Save to save your changes.

Create tasks

Help Desk Manager uses tasks to create tickets. A task contains one or more task elements, and each task element provides settings for a new ticket. When the task runs, Help Desk Manager creates a ticket for each task element, either sequentially or all at once, depending on the configured task.

Tasks can run manually or automatically, at given intervals or based on specific criteria, depending on how you configure them. Tasks are especially useful for handling repetitive processes.
For example, if your HR department has a set of routine onboarding tasks to complete for a new employee, you can create a task called New Employee and define each task element required to help a new employee get started in their new position.

Related tasks can include:

- Completing tax and insurance forms
- Accessing network resources
- Configuring a new computer system
- Installing and configuring corporate and department-specific software

You can trigger a new task when required—for example, when you on-board a new employee. When you run the task, Help Desk Manager generates a ticket for each task element. These tickets can be assigned to techs, who ensure each task element is completed.

You can create action rules that automatically trigger your tasks. See Automating parent/child tickets for more information.

To create a new task:

1. Access the task screen.
2. Create a new task.
3. Add new task elements.
4. Create new tickets from task elements.

Access the task screen

You can access the task screen by clicking Setup and selecting Tickets > Tasks.

The following screen displays.

When you create a new task, the task displays in this screen.

Create a new task

To create a new task, click New. The Task Info screen displays.

To create a new task:

1. In the Task Name field, enter a name for the task.
   For example:
   
   New Employee

2. (Optional) If this task pertains to a specific employee, search for the appropriate client in the Client Lookup box fields and assign a client to the task.
   Otherwise, leave this box blank.

3. Select the Scheduled check box to schedule this task to run at a specific time interval. Otherwise, leave this check box unchecked.
4. Select the Shared check box to share this task with other users.

Selecting this check box will also make the task available as an action rule and be visible to other techs.

5. Click Save.

A message displays stating that the task was created successfully. The Task Elements and History tabs appear in the screen.

### Add new task elements

To add new task elements, click Task Elements. In the initial screen, click New. The Task Elements tab screen displays, as shown below.

#### To create new task elements:

1. Click the Element Order drop-down menu and select 1 so this task element runs first.
2. (Optional) Select the Link to Parent check box to link this task to a parent ticket and automate parent/child ticket creation.

   When selected, the task element is inherited from the parent ticket.
3. Select the appropriate selections for Location, Room, and Department.
4. Click the Request Type drop-down menus and select the appropriate request type.

   For example, for new hire tasks, select HR.
5. In the Subject field, enter a name for this element.

   For example, to configure a new computer system for a new hire, you can enter Configure a new computer system.
6. In the Request Detail field, enter a description for the element.

   For example:

   Configure a new computer system with Microsoft Office and all required corporate software.
7. In the Tech drop-down menu, select a specific tech for this element (if required).
8. In the Priority drop-down menu, select the appropriate priority for this element.
9. In the Asset No. field, enter an asset number (if required).
10. In the Generate Next Element field, select On Creation to trigger the next element immediately after the ticket for this element is created.

    Otherwise, you can select When Status Equals and select the appropriate selection to trigger the next element.
11. Click Save.

   When completed, the Task Elements tab lists a summary of your task.

   After you create your first task elements, add additional elements to create new task elements for your task. For example, for the New Employee task, you can create new elements to create an email account, assign a specific desk in a building, and enroll the employee in on-site new hire classes.

### Create new tickets from task elements

To create tickets from task elements, click the Task Info tab, Select a task, and click the arrow next to the Task Name field.
To select another task, click the left and right arrows at the top right to scroll through all available tasks.

After you execute a task, click Tickets and verify that the task created the appropriate tickets. For example, when you click the Green arrow in the example above, Help Desk Manager creates a new ticket for the task.

Define your techs

Techs are users who resolve Help Desk Manager tickets. Permissions specify which tickets a tech can access and what actions the tech can perform.

Tech permissions are determined by:

- The type of tech account
- The set of permissions granted to the tech account

Help Desk Manager provides two account types for techs:

- The Admin account type provides unlimited access to all Help Desk Manager functionality. All permissions are granted to admins.
- The Tech account type allows limited access to Help Desk Manager functionality based on the tech’s permissions.

Use the Techs tab in Setup to assign your techs to specific support areas (such as Customers, and Clients). When completed, Help Desk Manager will automatically assign tickets to the appropriate tech based on your selections (such as Tech Group, Customers, and Devices).

Create tech accounts

Check out this video (8:58) on setting up a Help Desk Manager account.

Each tech who logs in to Help Desk Manager must have an account. You can use the Techs page to define the techs who will log in to Help Desk Manager. For each tech, you can define their work schedule, Customer, associated tech group, and business zone.

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

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

The Tech Name column includes a list of techs in your tech group. Some tech names may include an indicator that describes their availability status.
<table>
<thead>
<tr>
<th>INDICATOR</th>
<th>STATUS</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ C ]</td>
<td>Concurrent</td>
<td>The tech is assigned to a concurrent license.</td>
</tr>
<tr>
<td>[ D ]</td>
<td>Deleted</td>
<td>The tech account was deleted.</td>
</tr>
<tr>
<td>[ I ]</td>
<td>Inactive</td>
<td>The tech account is inactive.</td>
</tr>
<tr>
<td>[ S ]</td>
<td>Not on schedule</td>
<td>The tech has a specific work schedule outside the assigned business zone.</td>
</tr>
<tr>
<td>[ V ]</td>
<td>Vacation</td>
<td>The tech is on vacation.</td>
</tr>
</tbody>
</table>

You can configure all statuses except Concurrent in the Scheduling Setup section of each tech account. If the tech is assigned to a Concurrent license, the tech must wait for an available license to use Help Desk Manager.

SolarWinds MSP recommends creating the supervisor before creating the techs who report to that supervisor. Using this method, you can assign a supervisor to each tech as you create the tech.

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

   For more information about any field, see the tooltips.

   A supervisor is required for tech accounts, but optional for admin accounts.
5. To enable the tech to access the Help Desk Manager client interface, link the tech to a client account.

| Linked Client | Demo Client [client] |

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

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

6. Enable user interface enhancements to support the latest web browsers (if desired). When selected, some user interface enhancements required by the latest web browsers is enabled. This includes speed and standards requirements. See the tooltip for details.

Enable UI Enhancements

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

| Note Collapsing Threshold | 4 |
| History Collapsing Threshold | 5 |

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

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

9. In the E-Mail Setup section, specify the email settings and select the events that generate an email to this tech.

For example, to enable the tech to receive notifications about certain events, select the appropriate notification checkboxes.

Notifications

- Send me an e-mail when...
  - I am assigned to a Ticket
  - A Client updates my Ticket
  - My Ticket is reassigned to another Tech
  - A Tech I supervise is the recipient of a Ticket reassignment

An administrator may force some of these notifications for all techs in a particular Tech Group by configuring the email notifications at Setup > Techs > Tech Groups [Tech Group] > Tech Group Levels > [Tech Group Level].
10. To prevent Help Desk Manager from escalating a ticket to this tech when the tech is not scheduled to work, enter the Scheduling Setup settings.
   a. Specify the tech's business zone.
   b. If the tech's work schedule is different than the default work schedule for that zone, specify the work schedule.
   c. Indicate if the tech is on vacation.
   d. Optionally, select a backup tech to receive this tech's escalated tickets.
   e. Indicate whether the account is active.

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

11. Click Save.

**Assign a backup tech**

You can assign a backup tech to any tech account. When you change the tech status to indicate that the tech is not available, the backup tech is assigned to cover in their absence.

1. Log in to Help Desk Manager as an administrator.
2. Click Setup > Techs and select Techs.
3. Select a technician or agent in the Tech Name column.
4. Click the edit icon to enter Edit mode.
5. Click the Backup Tech drop-down menu and select a backup tech.
6. Click Save.
   The backup tech is saved in Help Desk Manager.
Edit the admin account

Use the My Account page to update your administrator account contact information, including your identity and setup for tickets, assets, e-mail, and scheduling. This account is the administrator account you use to log in to Help Desk Manager.

1. In the toolbar, click Setup and select Techs > My Account.
2. Click the pencil to enter edit mode.
3. Under Ticket Setup, decide whether you want the option to securely delete tickets.
   When the Secure-delete Tickets checkbox is selected and you delete a ticket, the ticket is physically removed from the database rather than marked as deleted. When a ticket is securely deleted, all attachments, client notes, ticket notes, tech notes, ticket history entries, and e-mail history related to the ticket are deleted.

   This option is not available for Tech accounts.

4. Review and update the remaining options, then click Save.

   Click the tool tips next to each selection for more information.
Request types, tech groups, and ticket assignment

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

Request types

Request types help you organize incoming issues into categories so you can route help desk tickets to technicians and groups who resolve these issues. They define the basic structure of your help desk system.

For example, if a client cannot access their email, they can create a ticket and select the default Email/Outlook request type. When they save the ticket, the ticket is routed to the tech or group who specializes in resolving email issues.

You can use request types to:

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

Help Desk Manager includes several default request types to help you get started, but you can create your own.

Tech groups

Tech groups are designed to be a group of similar request types handled by a group of techs. Tech groups categorize your technical support personnel based on their skills and knowledge. These groups enable Help Desk Manager to expedite tickets to the appropriate personnel based on the request type.

When you receive a help desk ticket, Help Desk Manager filters the techs based on the request type, which determines the tech group and tech group level. Next, it looks at the location of the client on the ticket and uses this information to filter out which techs are eligible based on their location group membership. If you configure a tech group level to auto assign a ticket to a level tech, it will automatically assign the ticket to the correct tech group. Otherwise, it will assign the ticket to the tech group manager.

When you install Help Desk Manager, the application includes three default tech groups: General, Network, and System. You can use these tech groups to help you get started, and then create new groups as you plan your tech groups and request types.

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

Define tech groups

All current tech groups appear in the Tech Groups screen located at Setup > Techs > Tech Groups.
In this screen, you can:

- Create a tech group
- Assign tech group levels
- Assign supported request types
- Enable ticket auto-assignment

Create a tech group

1. In the toolbar, click Setup and select Techs > Tech Groups.
2. Click New.
   The Tech Group Info page opens.
3. Enter a name to identify the tech group.
4. Select the group's manager.
5. If tickets should be assigned to the manager of the Customer group associated with the ticket (instead of the tech group manager), select When a Ticket's Location.
   
   Tickets are assigned to a group manager when auto-assignment is not enabled on the Tech Group Levels tab, or when auto-assignment is enabled but no techs in the group are available.

6. Click Save.

Configure tech group levels

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

If you configure multiple levels, all new tickets are initially assigned to techs in Level 1. Techs in higher levels receive tickets only if they are escalated.

1. Click the Tech Group Levels tab.
2. Click an existing level to open it, or click Add Level to add a new level.
3. Specify how Help Desk Manager will assign tickets for this level.
   a. Select the type of tech Help Desk Manager will assign tickets to.

<table>
<thead>
<tr>
<th>None</th>
<th>Tickets are not automatically assigned to individuals, but belong to the group level.</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Level Tech</td>
<td>Each ticket is assigned to a tech in this level based on the tech's availability.</td>
</tr>
<tr>
<td>Group Manager or Lead Tech</td>
<td>All tickets are assigned to the manager or lead tech, who then reassign them to techs.</td>
</tr>
</tbody>
</table>

   b. If you selected A Level Tech, select the assignment algorithm.
      - Load Balancing assigns each ticket to the tech with the smallest backlog (the lowest number of assigned tickets).
      - Round Robin assigns tickets sequentially to all techs in the level, regardless of the tech's current backlog.

<table>
<thead>
<tr>
<th>Auto-Assign Tickets To</th>
<th>None</th>
<th>A Level Tech</th>
<th>Group Manager</th>
<th>Lead Tech</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment Algorithm</td>
<td>Load Balancing</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. Leave the Customer check box unchecked.
5. In the Force E-Mail Notification To row, select who receives email notifications when a ticket is created or updated by the REST API or a SolarWinds MSP alert, or updated by a client. These notifications are sent regardless of the email options selected for each tech account.
6. In the Default Selected E-Mail Recipients row, specify who is selected by default to receive an email when a tech clicks Save and E-Mail in a customer ticket.
7. Select the techs assigned to this level.

<table>
<thead>
<tr>
<th>Level Techs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Richard Acevedo [S]</td>
</tr>
<tr>
<td>Sara Peterson</td>
</tr>
<tr>
<td>Lynette Strauss</td>
</tr>
</tbody>
</table>

8. Click Save.

Assign supported request types

1. Click the Request Types Supported tab to display the request types assigned to this tech group.
2. Click Edit to display all request types not assigned to any tech group.
3. Select one or more Request Types for this group to receive, and click Save.
Repeat the procedures above as needed to assign tech group levels and supported request types to each tech group.

**Enable ticket auto-assignment**

1. Log in to the Help Desk Manager Admin Console.
2. Click Setup > Techs > Tech Groups.
3. In the Group Name column, click a group name.
4. Click the Tech Group Levels tab.
5. Click a Level number in the Level column.
6. In the Auto-Assign Tickets To field, select an option. Click the tooltip for info:
   - Level Tech
   - Group Manager
   - Lead Tech
7. Click Save.

**Define tech permissions**

Permissions determine which tickets techs can access and which actions they can perform. Help Desk Manager includes default admin and tech permissions, but you can define other permissions that correspond to roles within your organization.

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

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

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

**Create a new tech permission set**

This example creates a new permission set called Senior Tech. Techs with this permission set can edit the Due Date and Request Detail fields on a ticket. They can also edit approved FAQs and approve new FAQs.

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

> The tooltips provide more information about each permission.
5. In Ticket Permissions, define what actions a tech can perform within a ticket.

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

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

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

9. Click Save.

Assign techs to a permission set

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

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

View the ticket due dates and work schedules in the calendar

The calendar displays scheduled and due client tickets in a calendar format. When you install Help Desk Manager, the calendar is enabled by default.

Click Calendar in the toolbar to access the calendar.

See the Help Desk Manager Administrator Guide for details on configuring the business zones and calendar settings.

Plan your weekly schedule

Techs and tech groups can use the calendar to review pending tickets and plan their weekly schedule. Administrators can use the calendar to keep track of ticket resolutions and reassign a ticket when the assigned tech is unavailable. This process ensures that all customer issues are resolved in a timely manner.

The calendar includes Techs and Tech Group tabs that allow you to view ticket due dates and work schedules for both categories. The current date is highlighted in blue.
See Configure the business zones and calendar settings in the Help Desk Manager Administrator Guide for details on how to configure the calendar settings.

Calendar display logic

The Status & Schedule section is located in the Ticket Details tab. Help Desk Manager displays the calendar information based on the Scheduled Date and Due Date settings in this section for each ticket.

The due date is calculated based on your Priority selection. For example, if you click the Priority drop-down menu and select Medium (1 wk), Help Desk Manager sets the due date one week out from the date when the ticket was created. This ticket due date displays in the calendar.

If you enter a specific due date in the ticket, Help Desk Manager overrides the priority selection and displays your selected ticket due date in the calendar.

See Create the priority types and alerts for details on how to modify the due date settings for each priority type.

Ticket display format

By default, each calendar entry displays the ticket number, due status, and abbreviated client name. The client name (for example, John Brown) is abbreviated based on the default display format.
If the ticket includes scheduled dates, Help Desk Manager adds the work schedule dates in the calendar. If the scheduled date matches the due date, both dates display in the same calendar date. The scheduled dates help techs plan their work week in the calendar.

<table>
<thead>
<tr>
<th>14</th>
</tr>
</thead>
<tbody>
<tr>
<td>114 (J. Brown) 9/14/20 8:00 am - 5:00 pm</td>
</tr>
<tr>
<td>114 due (J. Brown)</td>
</tr>
</tbody>
</table>

If the scheduled date spans more than one day, Help Desk Manager displays a ticket entry for each scheduled date and time, along with the due date entry.

<table>
<thead>
<tr>
<th>13</th>
<th>14</th>
</tr>
</thead>
<tbody>
<tr>
<td>114 (J. Brown) 9/13/20 8:00 am - 9/14/20 5:00 pm</td>
<td></td>
</tr>
<tr>
<td>114 due (J. Brown)</td>
<td></td>
</tr>
<tr>
<td>114 (J. Brown) 9/13/20 8:00 am - 9/14/20 5:00 pm</td>
<td></td>
</tr>
<tr>
<td>114 due (J. Brown)</td>
<td></td>
</tr>
</tbody>
</table>

View a tech calendar

This calendar displays all ticket due dates and work schedules assigned to a selected tech.

1. Log in to Help Desk Manager.
2. Click Calendar in the toolbar.
3. Click the Techs tab (if not selected).
4. Click the Tech drop-down menu and select a tech.

   Tech : Admin, Joe

All ticket due dates and work schedules display in the calendar for the selected tech.

View a tech group calendar

This calendar displays all ticket due dates and work schedules assigned to a selected tech group.

1. Log in to Help Desk Manager.
2. Click Calendar in the toolbar.
3. Click the Tech Groups tab.
4. Click the Group Name drop-down menu and select a tech group.

   Group Name : General

All ticket due dates and work schedules display in the calendar for the selected tech group.
View calendar events in a calendar client

You can subscribe to the calendar using Microsoft Outlook or a third-party calendar program that supports the Internet Calendaring and Scheduling Core Object Specification (iCalendar). When new events are posted, they display in your calendar program.

View calendar events in Outlook

You can subscribe to the calendar and view your calendar events in Microsoft Outlook. When you complete the subscription procedure, Outlook creates a link to your tech calendar in the left column under Other Calendars.

During the subscription procedure, you can also subscribe to your tech group calendar.

1. Close your Outlook program.
2. Log in to Help Desk Manager as a tech.
3. Click Calendar in the toolbar.
4. In the calendar toolbar, click Subscribe.
5. Follow the directions on your screen to complete the subscription.
6. Open your Outlook program.
7. In the left column, locate Other Calendars.
8. Click the calendar link to view your calendar events.

View calendar events in other calendar applications

You can subscribe to the calendar and view your calendar events using other third-party calendar applications that support the iCalendar format.

1. Log in to Help Desk Manager as a tech.
2. Click Calendar in the toolbar.
3. Right-click Subscribe and copy the link to a text file.
4. Open your calendar application.
5. Copy the link to the appropriate area.

See your calendar documentation for details on how to subscribe to an external calendar.

Define the tech group email notifications

You can enable Help Desk Manager to send an email notification to a tech, level techs, or a group manager when a new ticket is created. This notification is sent to one or more recipients when:
- A client updates a ticket.
- A ticket is updated using the REST API
- A ticket is updated from a SolarWinds Integration alert
- A new ticket is created using the REST API
- A new ticket is created from a SolarWinds Integration alert

All selected recipients receive email notifications regardless of their individual tech preferences for email notifications.

1. Click Setup and select Techs > Tech Groups.
2. Click a group in the Group Name column that will receive email alerts when a new ticket is opened.
3. Click the Tech Group Levels tab.
4. Select a tech group level in the Level column.

5. In the Force E-Mail Notification To row, select the people who receive an email notification.

<table>
<thead>
<tr>
<th>Force E-Mail Notification To</th>
<th>Tech</th>
<th>Level Techs</th>
<th>Group Manager</th>
<th>Send on Ticket Creation Only</th>
</tr>
</thead>
</table>

If you select Level Techs, the email is filtered by Location Group and Department Group membership.
If the ticket has no Location Group or Department Group or the Ignore Location and Department check box is selected in the level, then all level members receive an email notification.

6. Select the Send on Ticket Creation Only check box.
7. Click Save.

**Define the default settings for ticket email recipients**

This setting determines which user (based on request type) associated with a ticket will receive an email when a tech clicks Save & Email in the ticket.

**Request type is not assigned to a tech group**

1. Click Setup > Tickets > Options > Tech Options.
2. Scroll down to the Tech Options group and locate the Default Setting for Email Recipients (No Tech Group) option.

<table>
<thead>
<tr>
<th>Default Setting for E-Mail Recipients (No Tech Group)</th>
<th>Tech</th>
<th>Client</th>
</tr>
</thead>
</table>

3. Select the check box next to the tech or client assigned to receive ticket email notifications.
4. Click Save.
Request type is assigned to a tech group

1. Click Setup > Techs > Tech Groups.
2. Click the Tech Group Levels tab.
3. Locate the Default Selected E-mail Recipients option.

| Default Selected E-Mail Recipients | Client | Tech | Level Techs | Group Manager |

4. Select the check box next to the user assigned to receive ticket email notifications.
5. Click Save.

Define the ticket routing processes

Ticket routing processes define when and how to route tickets for certain types of requests, providing a controlled environment for managing time and cost-sensitive events. This feature enforces your defined settings, ensuring the right person or team receives the trouble ticket in a timely manner for problem troubleshooting and resolution.

Approvers

You can add client personnel responsible for approving or denying changes, as well as define the process work flow and requirements. When you create your Help Desk Manager ticket routing processes, you define your action rules.

Approver roles

Clients with approver roles approve ticket assignments based on the location or department associated with a given ticket. For example, each location could have a facilities representative and faculty representative location approver role who must approve requests to get a new printer.

You can configure these roles for each location in the Customer Approvers screen located at Setup > Processes > Customer Approvers. If these roles are assigned to an approval process for a Procure Printer request type, Help Desk Manager automatically sends approval requests for this request type to the clients-assigned approver roles for the ticket location.

Create action rules for ticket processing

Action rules create customized processes for unique situations. You can create action rules that define when, what, who, and how issues are approved, tracked, assigned, and handled. Action rules create a customized process for unique use cases.

Action Rule Info tab

Use this tab to add an action rule name so it appears in the Action Rules tab at Setup > Processes > Action Rules. You can also:

- Enable or disable the action rule.
- Specify the priority level when included with multiple action rules.
- Stop associated rules with a lower priority.
- Trigger the action rule based on a set of criteria.
- Trigger an action rule based on keywords in the e-mail subject.

Criteria tab

Use this tab to select the conditions that must occur before a ticket triggers the action rule. For example, to address service requests, issues, or problems initiated by the CEO, you can select Client > E-mail > Is equal to > CEO@email.com. When the ticket meets this condition, Help Desk Manager triggers the action rule.

Action tab

Use this tab to select the action that executes when the action rule criteria is met.

The Assign To action assigns the ticket to a specific tech or tech group. If you assign the ticket to a tech group, you can change the assignment algorithm to balance ticket processing during periods of high call volume. For example, you can select Load Balancing to assign a ticket to a tech within a tech group level with the least amount of assigned tickets. You can also select Round Robin to reassign the ticket assigned sequentially to a member of a tech group level. See Load balance action rules for ticket processing for details.

The Add Approval Process action assigns the ticket to an approval process that you define at Setup > Processes > Approval Processes. When the action rule is triggered, the ticket is assigned to your selected approval process for review. For example, if your company requires approvals for all new corporate assets (such as new computers or laser printers), you can assign this action to an action rule for all service requests used for new asset purchases.

The Change Priority action assigns the ticket to a specific status based on the nature of the ticket. For example, if your CEO contacts the help desk to request an immediate action, you can create an action rule with Change Priority set to Critical so it jumps to the top of the ticket queue.

The Change Status action changes the ticket status to another status type based on the action rule.

The Run Task action triggers a task that you create in Setup > Tickets > Tasks. For example, you can set up a task called New Employee with task elements that include request types for HR, Facilities, and IT. These request types can include task elements for setting up employee health insurance, setting up a work environment, and purchasing a new computer. When a tech creates a ticket to onboard a new employee, the assigned action rule triggers the New Employee task.

ℹ️ The Shared check box in the task must be checked to enable an action rule.

The Modify Ticket action provides options to automatically modify specific information within the ticket, such as Client and Location, Ticket Details, and Tech Note tabs in the ticket. For example, you can create a new action that assigns all new employee on-boarding tickets to a specific tech or request type.
The Send E-mail action sends an email to one or more specific recipients with a predefined subject and message to one or more recipients in your organization. For example, when you create a ticket to address a CEO issue, you can add an action to send an email to the director stating that the ticket is being processed and will be resolved as quickly as possible.

Add an Action Rule

1. In the toolbar, click Setup and select Processes > Action Rules.
2. Click New.
3. Select a priority and enter a rule name.
   
   ![Note] Only one action rule can be executed at a time. The action rule priority determines the trigger order of all action rules.

4. Select the Cascade check box to trigger all defined actions for a ticket.
   Do not select Cascade to trigger only the highest priority action.
5. Select the rule triggering options to define when and how often Help Desk Manager applies the action rule.
6. Click Criteria.
7. Configure the conditions that tickets must match to trigger the action:
   
   - Every condition in the All section must be true. If any condition is false, the action is not triggered.
     Help Desk Manager evaluates these conditions using the Boolean AND operator.
   - The Any section defines a group of conditions. At least one of these conditions must be true to trigger the action, but they do not all have to be true.
     Help Desk Manager evaluates these conditions using the Boolean OR operator.
   - If both sections include conditions, all conditions in the All section and at least one condition in the Any section must be true.
     Help Desk Manager evaluates the two groups with a Boolean AND operator between the groups:
     (all_1 AND all_2) AND (any_1 OR any_2)
   - If no conditions are defined in the All section, at least one condition in the Any section must be true.
8. Click Actions.
9. Specify the action to take when the conditions are met.
10. Click Save.
Load balance action rules for ticket processing

To balance ticket processing during periods of high call volume, you can configure action rules to reassign tickets to assigned techs in another tech group.

When you configure your action rule, select one of the following assignment algorithms to avoid ticket level errors:

- **Load Balancing.** Reassigns tickets specifically to assigned techs in another tech group with the least amount of ticket backlog.
- **Round Robin.** Reassigns tickets sequentially to assigned techs in another tech group.

When completed, the action rule automatically assigns tickets that meet the criteria to another tech group and request type.

1. In the toolbar, click Setup and select Processes > Action Rules.
2. In the Rule Name column, click the action rule you want to modify or click New to create a new Action Rule.
3. Select the appropriate options on the Action Rule Info tab for your new or existing action rule according to your needs.
   - If you are creating a new rule, enter a name in the Rule Name field.
4. Click the Criteria tab.
5. Select the appropriate criteria according to your needs.
6. Click the Actions tab.
7. Click the Assignment Algorithm drop-down menu and select Load Balancing or Round Robin, depending on your help desk requirements.
8. Select any additional options on the Actions tab according to your needs.
9. Click Save.

Enter customers

Use the Customers tab to set up and store information about Customer sites.

Help Desk Manager installations typically use Customers to represent individual sites where you provide services. However, Customers can also be used for different departments within a customer site or a storage place for inventory within Help Desk Manager.

You can use Customer information for setting up access controls for Techs and Clients. See Defining Techs and Adding Clients for information on grouping Techs and Clients using Customer information.

Add customer info

Enter Customer contact and Client permissions information in the Customer Info page.

Add customer contact information into the first 12 fields in the Customer Info tab. This information is for Client reference, so add all the details a Client would need.
This page also configures how Clients use the Customer information. Interaction capabilities include:

- Whether a Client assigned to the customer can create tickets for this Customer
- Client Admin can report for others
- Whether a Client needs to copy the Admin on updates

You can also add Customer billing and tax rates.

Other features on this page include adding attachments and configuring the color of the customer page.

Create customer groups

Group Customers together that have certain similarities, such as Devices, Clients, and servicing needs, and so on.

Define Customer Custom Fields

Use this page to create Customer custom fields.

Define clients

The Clients tab options define Help Desk Manager Client users and how they enter information into the application. When a new client accesses Help Desk Manager and is accepted by the system, they are automatically given the access and interaction permissions you defined for each client.

The AD / LDAP Connections option copies and adds client data from Microsoft® Exchange and other mail servers and adds this data to Help Desk Manager. Using this feature streamlines the process to help you avoid manually adding all your clients.

Manually create a client account

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

1. In the toolbar, click Clients.
2. Click New Client.
3. Enter the client's name, credentials, and contact information.

   - Required fields are bold.

4. Update other options as needed. See the tooltips for more information.
5. Click Save.

   If you selected E-mail Client When Account is Created, Help Desk Manager sends a confirmation email to the client.
Define client options

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

1. In the toolbar, click Setup and select Clients > Options.
2. If you want to allow clients to create accounts from the client interface, change the Client Can Create Account setting.
3. If you want to email login information to new clients, select E-Mail Client When Account Is Created.

To change the text of the email that Help Desk Manager sends, choose Setup > E-Mail > Templates and open the New Account Message template.

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

Set up client admin roles

You can set up a client admin to open tickets on behalf of other clients for a remote Customer or department. If the client tickets include service requests, incidents, and problem tickets that require additional diagnosis and intervention, the client admin can report these issues to management for problem resolution.

The client admin does not require a user license, but cannot act as a tech within the Help Desk Manager deployment.

1. Click Setup and select Clients > Client Admin Roles.
2. Click New.
3. In the Role Name field, enter a name for this role.
4. In the Request Type Supported row, select the appropriate role check boxes.

These request types populate with the Request Types you defined at Tickets > Request Types.
5. Click Save.

Add additional client admin permissions

You can add additional client admin permissions for a specific Customer.

1. Click Setup and select Companies and Customers > Customer & Rooms.
2. Click the appropriate Customer in the Customer Name column.
3. Click the pencil icon in the Customer Info tab to edit the tab preferences.
4. In the Default Client Admin Permissions row, select the appropriate values for the client admin.

If you select Client Admin Can Report for Others, the client admin has the option of creating a ticket and assigning a different client as the originator.

You can override the Default Client Admin Permissions values for each client admin by...
Click the icon next to each client.

5. Click Save.

Define client custom fields

Use the Client Custom Fields screen to create custom fields in the Client Info tab for each client record. After you create your custom ticket fields, the fields automatically display in each client record. The custom field can be hidden, visible, editable, or required for all clients based on your needs.

You can add a pop-up message to the custom field by entering message text in the Info field. When you add text to this field and click Save, an Information icon displays in the custom field. When a tech or client (based on your assigned permissions) clicks this icon, the pop-up message displays next to the field.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text</td>
<td>Creates a text box for 80 characters and up to 15 lines of text in the Client Info tab.</td>
</tr>
<tr>
<td>Numbers</td>
<td>Creates a text box for 80 characters and up to 15 lines of text or numbers in the Client Info tab.</td>
</tr>
<tr>
<td>Currency</td>
<td>Creates a text box for 80 characters and up to 15 lines of text or numbers in the Client Info tab.</td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Date</td>
<td>Creates a calendar field to add a date to the client record (for example, a start date) in the Client Info tab.</td>
</tr>
<tr>
<td>Date/Time</td>
<td>Creates a field with a selectable calendar and time drop-down menus in the Client Info tab.</td>
</tr>
<tr>
<td>Time Period</td>
<td>Creates a field with days and hours drop-down menus in the Client Info tab.</td>
</tr>
<tr>
<td>Multiple Choice</td>
<td>Creates a field with one or more checkboxes in the Client Info tab. You can select one or more options.</td>
</tr>
<tr>
<td>Single Choice</td>
<td>Creates a field with one or more radio buttons in the Client Info tab. You can only select one option.</td>
</tr>
<tr>
<td>Popup Menu</td>
<td>Creates a field with one or more options in a drop-down menu in the Client Info tab. You can only select one option.</td>
</tr>
</tbody>
</table>
If you want to include one option (for example, Yes or No), enter the option text in the Option field. Point your mouse arrow over Options for details.

To create a custom ticket field:

1. Click Setup > Clients > Client Custom Fields.
2. Click New.
   The Client Custom Fields screen displays the default values for a new custom field.
3. Enter a Label to identify this field.
4. On the Display Order drop-down menu, select this field's position within the Custom Fields section of a ticket.
5. In the Clients and Techs sections, specify whether each group can see or edit the custom field.
   - Techs with admin accounts can edit all custom fields.
6. Select the Type of input this field will accept.
   The remaining fields change based on the Type you select.
7. Complete the remaining fields. Point to any field name to display information.
8. Click Save.

Import Active Directory/LDAP directory connections

Use the Active Directory / Lightweight Directory Access Protocol (AD / LDAP) Connections settings to discover and import client AD / LDAP information from the client's Microsoft Exchange or LDAP server. AD / LDAP Connections can perform bulk data imports of AD and LDAP directories that speeds up the client setup process and greatly reduces manual input errors. You can use the AD/LDAP Connections to synchronize Help Desk Manager user information with the latest information on your Microsoft Exchange or LDAP server.

About LDAP

LDAP is a protocol that creates a central user database for single sign-on (SSO), allowing you to access resources and services in a network. LDAP implementations use self-signed certificates by default. To use a trusted certificate issued by a Certificate Authority (CA), you can import the certificate into your Java key store.

Validate LDAP certificates

You can establish a secure connection from Help Desk Manager to an LDAP server by selecting the SSL check box. To accept certificates issued by a CA, select the Accept only trusted Certificates check box. When selected, Help Desk Manager verifies the host LDAP certificate against the certificates in your Java key store. If Help Desk Manager detects a certificate that is not signed by a trusted CA or uploaded to your Java key store, Help Desk Manager generates a warning in the user interface and does not store the LDAP connection.
The WHDGlobalConfig.properties file contains the name, password, and location of your Java key store. This file is located in the following directory:

c:\<HelpDeskManager>\conf

To update these parameters, edit the file with your new settings, save the file, and then restart Help Desk Manager. See Keystore Settings (for SSL Connections) for more information.

Synchronize Help Desk Manager user information

When you import your AD/LDAP connections, use the following conventions:

- Ensure the person configuring and using this import is experienced with AD and LDAP administration.
- Work with a client representative familiar with AD/LDAP and the existing structure. The client representative must have administrative access to the customer AD/LDAP server.
- If your AD/LDAP directory contains mostly users not using Help Desk Manager, SolarWinds does not recommend performing a bulk AD/LDAP import.

To connect to a client LDAP server and import or synchronize users:

1. Click Setup.
2. Select Clients > AD / LDAP Connections.
3. To create a new connection, click New.
   
   To update an existing connection, click the connection name to open it, and then click ☀️ to edit.
4. In the Connection Basics tab, select Enabled to enable the connection.
5. Enter the required connection information. See the tooltips for more information.
6. Maximize the Advanced window and review or update the advanced settings.
7. If you want to use bulk synchronization, select Enabled and then specify when the synchronization should occur.

   To avoid affecting network performance, schedule the synchronization for a time when the network is least busy.

8. Click Save.
9. Click Test Settings to test your settings, and make adjustments if needed.

See LDAP fails to connect when initiating a connection for troubleshooting information.
10. Map client account fields to attributes in the schema.
   a. Click the Attribute Mappings tab.
   b. Specify the AD or LDAP schema being used.
   c. Locate each client account field that will be populated with information from the AD or LDAP server. To map each field, enter the associated schema element as instructed by the AD or LDAP administrator.

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

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

11. Click Save.

Import clients

Use the Import Clients function to import client data into Help Desk Manager. See Import data using templates for information on applying templates.

1. In the toolbar click Setup and select Data Import > Import Clients.
   The Import Clients screen displays.
2. Click the Sync Based On drop-down menu and select the column in the import file used to synchronize the import data with existing records.
3. Select the Ignore Blank Fields check box to ignore blank fields in the imported file.
   If not selected, the blank fields in the import file will clear the corresponding values in the existing records.
4. Select the Add New Entities check box to add new entities referred by the import records if they do not exist in the database.
5. Select the Abort Import on First Error check box to stop the import procedure when Help Desk Manager encounters an error.
   If not selected, Help Desk Manager will continue the import if errors appear.
6. In the File Type row, select the appropriate import file format.
7. Click the File Encoding drop-down menu and select the method used to encode the import file.
   If your import file contains any Unicode characters, select Microsoft Excel, as this file format encodes in UTF-16 format.
8. In the Import Data File row, click Choose File and select the file to use for the import procedure.

[i] The first line of the import file must match the import template. SolarWinds MSP recommends copying and pasting the template into your data file to ensure that it is identical. The import procedure will generate an error if the first row of the import file does not match the template.

9. Click Import.

The file contents are imported into the Help Desk Manager database.
Define devices

Devices are the Client-owned software and hardware that Techs work with. Help Desk Manager tracks Devices by properties such as:

- Customer
- Type
- Status
- Owner
- Serial Number
- Warranty Dates
- Lease Types
- Relationship to Other Devices
- Ticket History
- Purchase Orders

Configure Device information and permission options

Use the Asset Options screen to set the options for Device information import and Device permissions for Techs.

> Click the tooltips for details.

Deploy N-central remote control links

Individual Techs can work on tickets for N-central-controlled devices by deploying the HDM N-central remote control links.

Before you configure and launch the HDM N-central remote control links, configure N-central to integrate with HDM. After you integrate N-central and HDM, you can launch the HDM N-central remote control link.

See Integrating Help Desk Manager with N-central for information about setting up an N-central integration configuration.

To deploy the N-central remote control links:

1. Configure access to the HDM N-central remote control feature for a particular device.
   a. Log in as an administrator.
   b. Navigate to Setup > Devices > Options.
   c. In the Options screen, locate the N-central Links Enabled row.
   d. Select the N-central Links Enabled check box.
   e. In the Host field, enter the name of the host on which the N-central server is running.
   f. In the Port field, enter the port number where the N-central web application is listening.
The default port number is 80.

g. Select the SSL check box to secure the hyperlinks to the N-central web application.

h. Click Save.

The hyperlinks to the N-central server will now appear in the N-central Help Desk. These links will appear in tickets next to assets that are synchronized with N-central.

i. Log in to N-central.

j. In the user interface, click Device - Network Devices.

k. Locate your device and ensure that it is connected to N-central.

l. Close N-central.

2. Configure Administrator access to the HDM N-central remote control feature.
   
   a. Log in as an administrator.

   b. Click Setup and select Techs > My Account.

   c. Select the Enable N-central Links check box.

   d. Click Save.

   N-central links will now appear in tickets next to assets that are synchronized with N-central.

3. Configure Tech access to the HDM N-central remote control feature.
   
   a. Log on as an administrator.

   b. Click Setup and select Techs > Techs.

   c. In the Tech Name column, click on the Tech that needs access to the remote control feature.

   d. In the Account Info tab, click Enable N-central Links.

   e. Click Save.

   N-central links will now appear in tickets next to assets that are synchronized with N-central.

   f. Repeat step c through step e for all remaining Techs who require access.

When completed, administrators and Techs can launch the N-central remote control link through a ticket.

1. Click Start and select Tickets > My tickets.

2. Open the ticket you need to resolve.

3. Select the Device Info tab.

4. In the Ticket Devices tab, click the icon for the device you want to remotely control.

   N-central opens in a new browser tab.

5. Switch to the new browser tab to access the device through N-central.

Integrate other tools with HDM

Device tool links appear in HDM wherever there are references to a Device or to a Client's IP address. Use the Other Tool Links function to create custom tool hyperlinks.

To select and configure this option:

1. Click Add Link in the Other Tool Links area.

2. Enter the tool name the way you want it to appear in HDM.
3. Enter the tool’s URL.
4. If you want a new window to open when you click the tool, select Open in New Window.
5. Select an icon to represent the tool.
6. Click Save.

Set technician device permissions

Select which device features Techs can see and edit in the Technician Device Permissions area. Choose permissions for device features such as:

<table>
<thead>
<tr>
<th>Device number</th>
<th>Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>Model</td>
<td>Network Address</td>
</tr>
<tr>
<td>Customer</td>
<td>Network Name</td>
</tr>
<tr>
<td>Client</td>
<td>MAC Address</td>
</tr>
<tr>
<td>Relation</td>
<td>Purchase Order</td>
</tr>
<tr>
<td>Status</td>
<td>Purchase Date</td>
</tr>
<tr>
<td>Service Contract</td>
<td>Audit Date</td>
</tr>
<tr>
<td>Serial Number</td>
<td>Notes</td>
</tr>
</tbody>
</table>

When you are finished configuring Tech Device Permissions, click Save.

Define Device type, status, warranty, and lease information

Device type, status, warranty, and lease information are usually included data imports. However, if you have undefined Device types, you can manually define them on the Types page.

Devices can be associated with clients so techs can easily identify the items for which support is requested.

Device Classes tab

Use the Device Classes tab to represent any type of classification you choose, such as Software, Hardware, Owned, and Leased.

1. In the toolbar, click Setup > Assets > Types.
   The Types screen appears.
2. Click the Asset > Classes tab.
3. Click New.
4. In the Name field, enter a name for the custom type.
5. In the Custom Fields row, select which of your custom fields should be attributed to the type you are creating.
6. Click Save.
Device Status Classes tab

Use the Device Status Classes tab to define Device status. A status can be anything you create, such as Deployed (for equipment in use) or In Storage (for equipment in storage and not in use). Help Desk Manager includes predefined Deployed status types.

1. In the toolbar, click Setup and select Assets > Types.
2. Click the Device Status Classes tab.
3. Click New.
4. In the Name field, enter a name for the custom type.
5. Select the Retired check box if your custom selection is retired.
6. Click Save.

Warranty Classes tab

Use the Warranty Classes to create and apply warranty classes (from one year to five years) and reflect the appropriate warranty length or type for a particular asset class.

1. In the toolbar, click Setup and select Types.
2. In the toolbar, click Setup and select Types.
3. Click the Warranty Classes tab.
4. Click New.
5. In the Warranty Name field, enter the name used to identify the warranty.
6. In the Expiration row, enter the amount of time until expiration.
   If there is no expiration, leave the field blank.
7. Click Save.

Lease Classes tab

Use the Lease Classes tab to create and apply lease types—from one year to five years—and reflect the appropriate warranty length or type for a particular asset class.

1. In the toolbar, click Setup and select Lease Types.
2. Click the Lease Types tab.
3. Click New.
4. In the Lease Name field, enter a name to identify the lease.
5. In the Expiration row, enter the amount of time until expiration.
   If there is no expiration, leave this field blank.
6. Click Save.

Define Device custom fields

Use Custom Fields to extend the types properties associated with Devices.

Below is an example of the Device Custom Fields screen.
<table>
<thead>
<tr>
<th>Field / Check Box</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label</td>
<td>The custom field name.</td>
</tr>
<tr>
<td>Type</td>
<td>Select one of the following types using semicolons to delimit multiple</td>
</tr>
<tr>
<td></td>
<td>choices in the Options setting:</td>
</tr>
<tr>
<td></td>
<td>- Text (up to 255 characters)</td>
</tr>
<tr>
<td></td>
<td>- Number (number of integers with up to four decimal places)</td>
</tr>
<tr>
<td></td>
<td>- Currency</td>
</tr>
<tr>
<td></td>
<td>- Date</td>
</tr>
<tr>
<td></td>
<td>- Dateline</td>
</tr>
<tr>
<td></td>
<td>- Time Period</td>
</tr>
<tr>
<td></td>
<td>- Multiple Choice (adds check boxes)</td>
</tr>
<tr>
<td></td>
<td>- Single Choice (adds radio buttons)</td>
</tr>
<tr>
<td></td>
<td>- Pop-up menu (adds a single-selection menu)</td>
</tr>
<tr>
<td>Width</td>
<td>Specifies the number of columns in the custom field text area.</td>
</tr>
<tr>
<td>Info</td>
<td>Creates a tool tip that helps users complete the custom field.</td>
</tr>
<tr>
<td></td>
<td>When the tool tip is created, an Info icon is displayed next to the</td>
</tr>
<tr>
<td></td>
<td>custom field. When the user mouses over the Info icon, the tool tip</td>
</tr>
<tr>
<td></td>
<td>pops up.</td>
</tr>
<tr>
<td>Display Order</td>
<td>Click the drop-down menu and select the custom field order.</td>
</tr>
<tr>
<td>Height</td>
<td>Specifies the number of rows in the custom field text area</td>
</tr>
<tr>
<td>Clients</td>
<td>Configures the Client permissions, defining whether the client can see,</td>
</tr>
<tr>
<td></td>
<td>edit, or interact with the custom field.</td>
</tr>
<tr>
<td></td>
<td>These fields are disabled when the custom field is not visible in the</td>
</tr>
<tr>
<td></td>
<td>client interface.</td>
</tr>
<tr>
<td>Techs</td>
<td>Configures the Tech permissions, defining whether the tech can see, edit,</td>
</tr>
<tr>
<td></td>
<td>or interact with the custom field.</td>
</tr>
<tr>
<td></td>
<td>Administrative users have at least Editable access to all custom fields.</td>
</tr>
<tr>
<td></td>
<td>The Required fields are required for Administrators.</td>
</tr>
<tr>
<td>Limit Input to Text</td>
<td>Ensures the maximum number of characters does not exceed the number of</td>
</tr>
<tr>
<td>Box Width</td>
<td>characters chosen in the Width option.</td>
</tr>
<tr>
<td>Encrypt in database</td>
<td>AES-encrypts the data entered in the custom field before it is stored in</td>
</tr>
<tr>
<td></td>
<td>the database.</td>
</tr>
</tbody>
</table>
Define an asset custom field

1. Click Setup > Assets > Asset Custom Fields.
2. Click New.
3. In the Label field, enter a name for this custom field.
4. Complete the remaining fields, and then click Save.
5. Click Setup > Assets > Types.
6. In the Asset Type Name column, click an asset type.
7. In the Custom Fields row, select Specific.
8. In the Selected Custom Fields row, select the checkbox next to your new asset custom field.
9. Click Save.

Add manufacturers

Use the Manufacturers Info page to add hardware and software and other Device manufacturer contact information.

Add a manufacturer

1. Click Setup > Assets > Manufacturers & Models.
2. Complete the fields, and then click Save.

Add vendors

The Vendors page defines contacts for ordering parts or software.

Add a vendor

1. Click Setup > Devices > Vendors.
2. Click New.
3. Complete the fields, and then click Save.
Define PO custom fields

Purchase Order (PO) Custom Fields define custom fields and specify view and editing permissions for techs. Use this screen to extend the types properties associated with purchase orders.

See Managing Devices for information about working with purchase orders.

No client permissions are available in PO custom field because clients never view purchase orders.

Below is an example of the PO Custom Fields screen.

<table>
<thead>
<tr>
<th>FIELD / CHECK BOX</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label</td>
<td>The custom field name.</td>
</tr>
</tbody>
</table>
| Type              | Select one of the following types using semicolons to delimit multiple choices in the Options setting:  
  ■ Text (up to 255 characters)  
  ■ Number (number of integers with up to four decimal places)  
  ■ Currency  
  ■ Date  
  ■ Dateline  
  ■ Time Period  
  ■ Multiple Choice (adds check boxes)  
  ■ Single Choice (adds radio buttons)  
  ■ Pop-up menu (adds a single-selection menu) |
| Width             | Specifies the number of columns in the custom field text area. |
| Info              | Creates a tool tip that helps users complete the custom field.  
  When the tool tip is created, an Info icon appears next to the custom field. When the user mouses over the Info icon, the tool tip pops up. |
| Display Order     | Click the drop-down menu and select the custom field order. |
| Height            | Specifies the number of rows in the custom field text area |
| Clients           | Configures the Client permissions, defining whether the client can see, edit, or interact with the custom field.  
  These fields are disabled when the custom field is not visible in the client interface. |
<p>| Techs             | Configures the Tech permissions, defining whether the Tech can see, edit, or interact with the custom field. |</p>
<table>
<thead>
<tr>
<th>FIELD / CHECK BOX</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Administrative users have at least Editable access to all custom fields. The Required fields are required for Administrators.</td>
</tr>
<tr>
<td>Limit Input to Text Box Width</td>
<td>Ensures the maximum number of characters allowed does not exceed the number of characters chosen in the Width option.</td>
</tr>
<tr>
<td>Encrypt in database</td>
<td>AES-encrypts the data entered in the custom field before it is stored in the database.</td>
</tr>
<tr>
<td></td>
<td>If you select this option after the data is entered, the existing values are not encrypted until they are updated.</td>
</tr>
<tr>
<td>Searchable</td>
<td>Enables the custom field to appear as a search option in the Advanced Search page.</td>
</tr>
<tr>
<td>Allow full-text search (slower)</td>
<td>Indexes only the first 255 characters in a custom field.</td>
</tr>
<tr>
<td></td>
<td>Select this option when the custom field values may exceed 255 characters. Applying this option greatly reduces search performance.</td>
</tr>
<tr>
<td>Exclude From E-Mail</td>
<td>Ensures the custom field does not appear in emails to Clients or Techs.</td>
</tr>
</tbody>
</table>

Define the PO custom fields

1. Click Setup > Devices > PO Custom Fields.
2. Click New.
3. In the Label field, enter a name for this custom field.
4. Complete the remaining fields, and then click Save.

Import Device data

Use the Import Assets screen located at Setup > Data Import > Import Devices to add Device data into Help Desk Manager.

To ensure a successful data import, use the Devices Import template.

See Import data using templates for information about applying templates.

1. Click Setup and select Data Import > Import Assets.
2. In the Import Devices screen, complete the fields as required.
   Click the tooltips for additional information.
3. Click Import.
   The file is imported into Help Desk Manager.
Define parts and billing

You can apply parts and billing options in Help Desk Manager to track resources, such as parts, inventory, and billing tickets. When applied, you can:

- Select parts and billing options
- Set up billing invoices
- Define rates and terms
- Define part custom fields

Apply parts and billing options

Parts & Billing Options enable or disable the parts and billing functionality, define the ticket PDF format, and enable or disable service time blocks by Customer. This functionality is enabled by default. Always make sure this functionality is active when you configure how Help Desk Manager handles parts and billing.

To enable this feature, click Setup > Parts & Billing > Options and select the Parts & Billing Enabled check box in the Parts & Billing Options screen. To disable this feature, clear the check box.

Disabling Parts & Billing hides the main Parts icon, the ticket detail Parts & Billing tab, billing preferences, and the billing reporting options.

Perform invoicing

Set up your company contacts in Help Desk Manager for each billing invoice. When completed, you can generate an invoice or quote from a ticket.

Specify a company contact for invoices

1. Click Setup > Parts & Billing > Invoicing Options.
2. In the Invoicing tab, enter the appropriate contact information.
   - Click the tooltips for more information.
3. (Optional) Click the Logo tab.
4. (Optional) Upload a GIF or PNG file containing your company logo.
5. Click Save.

Generate a PDF invoice or quote from a ticket

1. In the toolbar, click Tickets and select Search Tickets.
2. In the Basic Search or Advanced Search tab windows, enter the appropriate search criteria for your ticket, and then click Search.
3. In the search results, click the appropriate ticket number.
4. Click the Parts & Billing tab.
5. Select the type of PDF you want to generate.
6. Click the PDF icon.

**Define rates and terms**

You can use the Billing Rates, Terms, and Taxes feature to define billing rates to use in your tickets. You can configure specific billing rates to be consistent with the level of delivered service (Level tech) and the applicable local tax codes.

1. Click Setup and select Parts & Billing > Rates & Terms.
2. Click New.
3. Complete the fields and selections as required, then click Save.
   - Click the tooltips for additional information.
4. Click the Billing Terms tab.
5. Click New.
6. Complete the field and drop-down menu as required, then click Save.
   - Click the tooltips for more information.
7. Click the Tax Rates tab.
8. Click New.
9. Complete the fields and selections as required, then click Save.
   - Click the tooltips for more information.

**Define part custom fields**

Use the Part Custom Fields screen to create custom part fields. To access this screen, click Setup and select Part & Billing > Part Custom Fields.

Below is an example of the Part Custom Fields screen.

<table>
<thead>
<tr>
<th>FIELD / CHECK BOX</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label</td>
<td>The name of your custom field.</td>
</tr>
<tr>
<td>Type</td>
<td>Select one of the following types using semicolons to delimit multiple choices in the Options setting:</td>
</tr>
<tr>
<td></td>
<td>- Text (up to 255 characters)</td>
</tr>
<tr>
<td></td>
<td>- Number (number of integers with up to four decimal places)</td>
</tr>
<tr>
<td></td>
<td>- Currency</td>
</tr>
<tr>
<td></td>
<td>- Date</td>
</tr>
<tr>
<td></td>
<td>- Dateline</td>
</tr>
<tr>
<td></td>
<td>- Time Period</td>
</tr>
<tr>
<td></td>
<td>- Multiple Choice (adds check boxes)</td>
</tr>
<tr>
<td></td>
<td>- Single Choice (adds radio buttons)</td>
</tr>
<tr>
<td>Field / Check Box</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Pop-up menu (adds a single-selection menu)</td>
<td></td>
</tr>
<tr>
<td>Width</td>
<td>Specifies the number of columns in the custom field text area.</td>
</tr>
</tbody>
</table>
| Info | Creates a tool tip that helps users complete the custom field.  
When the tool tip is created, an Info icon appears next to the custom field.  
When the user mouses over the Info icon, the tool tip pops up. |
| Display Order | Click the drop-down menu and select the custom field order. |
| Height | Specifies the number of rows in the custom field text area. |
| Clients | Configures the Client permissions, defining whether the client can see, edit, or interact with the custom field.  
These fields are disabled when the custom field is not visible in the client interface. |
| Techs | Configures the Tech permissions, defining whether the Tech can see, edit, or interact with the custom field.  
Administrative users have at least Editable access to all custom fields. The Required fields are required for Administrators. |
| Limit Input to Text Box Width | Ensures the maximum number of characters allowed does not exceed the number of characters chosen in the Width option. |
| Encrypt in database | AES encrypts the data entered in the custom field before it is stored in the database.  
If you select this option after the data is entered, the existing values are not encrypted until they are updated. |
| Searchable | Enables the custom field to appear as a search option in the Advanced Search page. |
| Allow full-text search (slower) | Indexes only the first 255 characters in a custom field.  
Select this option when the custom field values may exceed 255 characters.  
Applying this option greatly reduces search performance. |
| Exclude From E-Mail | Ensures the custom field does not appear in emails to Clients or Techs. |

Configure inventory alerts

Configure the frequency and recipients for all email alerts—for example, when your inventory threshold falls below your specified level for parts a client regularly requests.
1. Click Setup > Parts & Billing > Inventory Alerts.

2. In the Inventory Alerts screen, click the first Inventory Alert Interval drop-down menu and select a value from 0 to 100.

3. Click the second Inventory Alert drop-down menu and select the appropriate alert frequency.

4. In the Default Inventory Alerts Recipients field, enter the email addresses for each recipient who will receive inventory alerts.

5. Click Save.

Override default inventory alert recipients

1. Click Setup and select Companies and Locations > Locations and Rooms.

2. In the Location Name column, click the appropriate location.

3. Edit the information in the tab windows as required.

4. Click Done.

Set up the dashboard

Use the dashboard to create and view pie chart, bar graph, and text widgets that display ticket statistical data. These widgets display trends in specific ticket categories (such as Ticket Status and Alert Condition) to help you locate issues that could impact your help desk and corporate operations.

You can configure three types of widgets:

- Ticket Chart
- Ticket Activity
- What's New

Access the widgets from the Widget Drawer. Click Open Widget Drawer in the dashboard to display all available widgets.

Ticket Chart widget

The ticket chart widget displays your ticket metrics in pie or bar charts. Each chart type identifies the total number of selections in a specific category.

Widgets can generate a warning message if the data cannot be processed within 15 seconds. See Ticket Chart performance limitations for details.

Create a ticket chart widget

1. In the toolbar, click Tickets > Dashboard.

2. In the dashboard, click Open Widget Drawer.

3. Select Ticket Chart Widget.

A preview of the widget displays.
4. Click and drag the widget header to the dashboard.
5. Resize the widget to your desired size. Use the blue snap-to guide to ensure that the widget is sized correctly.
6. Click the drop-down menu icon and select Options.
7. Select your chart options.
   To import the chart data into a spreadsheet, click the Raw Data icon and copy the data in the window to an external file. When you are finished, close the window.
8. Click Save.
   The widget displays in the dashboard with your selected category in the header. When you hover your mouse arrow over a pie slice or horizontal bar, a pop-up window displays the total number of tickets.

   ![Select the Hide Headers check box to hide all widget headers.]

9. Click Close Widget Drawer.

**Ticket Chart types**

You can select a pie chart or horizontal bar chart.

The pie chart divides each ticket category into slices that illustrate the numerical proportion of your tickets. You can restrict the chart data by clicking a legend item to remove the category from the chart. For example, if you click and remove Closed, the chart only displays Open and Pending ticket information.

Double-click a legend option to remove all categories except your selected category.

The Horizontal Bar chart displays your ticket categories using color-coded bars. Each category includes a separate bar color and corresponding data value.

**Ticket Chart Options**

To configure your widget options, click the options drop-down menu. The Ticket Chart Options window opens, and you can configure all available options to display in the chart.

The window includes a widget preview that displays your data in real time. When a data parameter changes, Help Desk Manager implements a new database call and updates the chart to reflect the changes. If your ticket chart options include a complicated request, the chart may require additional time to process the request.

Select a Category option to filter your ticket data by request type (such as Status). The Query option filters your category results through a condition or qualifier that you set up in Advanced Search.

For example, you can set up a query that searches your Help Desk Manager database for all tickets opened within the last 30 days and save the query as Opened within 30 days.

To share your query with all techs, select the Shared check box in the tab window. When you select the query in the Query drop-down menu, an asterisk (*) displays next to the query and indicates the query is shared with all techs.
When you select this query in the Query menu and Status in the Category menu, the chart preview displays the number of tickets by status opened within the last 30 business days. An asterisk (*) displays next to the query and indicates the query is shared with all techs.

If you select Horizontal Bar, the Show non-zero items only check box displays. Select this check box to display all categories with values greater than zero only.

After you select the chart type and the number of top items to display in the chart, click Save to display the chart in your widget. You can also export the raw data to an external file.

Help Desk Manager refreshes the Ticket Chart widget every 60 seconds.

**View tickets by category and status**

When you click a pie slice or horizontal bar, Help Desk Manager displays all associated tickets. For example, when you click the Open pie slice, Help Desk Manager displays all open tickets opened within the last 30 days with an Open status. The widget title reflects the selected category and category value.

To adjust the number of displayed tickets, click the Items per Page drop-down menu. If you need to search for a specific term in the page, press Control + F and enter your search term to highlight it in the page.

**View a selected ticket**

You can view an individual ticket by clicking a ticket in the window. For example, if you click ticket 12, Help Desk Manager opens the Search Tickets option and displays ticket number 12 on your screen.

Click to return to the Dashboard. If you click the browser Back arrow, you return to the Dashboard main page, but you lose your search results.

**Ticket chart performance limitations**

The Category drop-down menu in the Ticket Chart Options window include the following categories:

- Alert Level
- Alert Condition
- On-time Status
- First-Call Resolution

These categories may require an extended amount of time to query the Help Desk Manager database, process the results, and display the results in the chart. If these categories cannot be processed within 15 seconds, the system times out and displays a warning message.

To minimize this issue, create and save a query in Tickets > Search > Advanced Search to reduce your search results. When you are finished, add the query to your widget options. This method reduces the amount of data processing required by the Help Desk Manager database and prevents a warning.

For example, you can create a query in the Tickets > Search Tickets > Advanced Search tab that locates all tickets created within the last month. When you are finished, save the query with a corresponding name (such as Open within 30 days).
To share the query with other techs, select the Shared check box. When you configure your ticket chart options, the shared queries displays in the Query drop-down menu with an asterisk (*).

**Ticket Activity widget**

The ticket activity widget displays the recent changes applied to your tickets. These changes include:

- Tech notes
- Client notes
- Emails
- Assignments
- Escalations
- De-escalations
- Others

Help Desk Manager refreshes this widget every 60 seconds.

**Ticket Activity options**

You can configure the ticket activity widget by clicking Options in the widget drop-down menu. This opens the Ticket Activity Options window where you can configure all available options that display in the chart. The window includes a chart preview that shows you how the chart will display in the widget based on your selected options.

You can select one or more activity types, select a query to narrow your search results, and select the number of items that display in the Ticket Activity window. Additionally, you can export the widget data to an external file.

**Create a Ticket Activity widget**

1. In the toolbar, click Tickets > Dashboard.
2. In the dashboard, click Open Widget Drawer.
3. Select Ticket Activity.
   - A preview of the widget displays.
4. Click and drag the widget header to the dashboard.
5. Resize the widget to your desired size. Use the blue snap-to guide to ensure the widget is sized correctly.
6. Click the drop-down menu icon and select Options.
7. Select the appropriate options in the Ticket Activity Options window, and then click OK.
   - The widget displays in the dashboard.

You can select the Hide Headers check box to hide all widget headers.

8. Click Close Widget Drawer.
What's New widget

The What's New widget lists the new features included with your release. This widget does not include any configuration options.

Create a What's New widget

1. In the toolbar, click Tickets > Dashboard.
2. In the dashboard, click Open Widget Drawer.
   
   A preview of the widget displays.
4. Click and drag the widget header to the dashboard.
5. Click Close Widget Drawer.
6. Resize the widget to your desired size. Use the blue snap-to guide to ensure all widgets are the same size in your dashboard.
   
   The widget is resized in the dashboard. No configuration is required.
7. Click Close Widget Drawer.

Export the widget data

1. In the toolbar, click Tickets > Dashboard
2. In the dashboard, select a ticket chart widget to export the data.
3. Click the drop-down menu icon and select Options.
4. Click the Raw Data icon.
5. Copy and save the data to an external file.

Add a custom logo

After you set up the dashboard, you can add a custom log to personalize the user interface.

The log file should be in PNG or GIF format. For the CSS, the image should be 259 x 61 pixels. Otherwise, the image height should be 70 pixels or less.

1. Locate a PNG or GIF image file for your logo.
2. Log in to the Help Desk Manager Administrator Console.
3. Click Setup > General > Look & Feel.
4. Click Clear to remove the default logo.
5. Click Add File.
7. Click Save.
Start and Stop Help Desk Manager Services

When you install or update certain features in your Help Desk Manager deployment, you must stop and restart the Help Desk Manager Services in your operating system to enable these features. The following sections describe how to start and stop Help Desk Manager Services in each supported operating system.

**Make sure you are logged in to your Help Desk Manager system as an Administrator.**

### Microsoft Windows Server

To start Help Desk Manager Services, do one of the following:

- Using the Start Menu options, right-click Start Help Desk Manager and select Run as Administrator.
- Navigate to your `<HelpDeskManager>` directory, right-click `whd_start.bat`, and select Run as Administrator.
- Run the following commands in a command prompt (if Help Desk Manager is installed in the default location):
  ```
  cd C:\Program Files\N-able Technologies\Help Desk Manager
  whd start
  ```

To stop Help Desk Manager Services, do one of the following:

- Using the Start Menu options, right-click Stop Help Desk Manager and select Run as Administrator.
- Navigate to your `<Help Desk Manager>` directory, right-click `whd_stop.bat` and select Run as Administrator.
- Run the following commands in a command prompt (if Help Desk Manager is installed in the default location):
  ```
  cd C:\Program Files\N-able Technologies\Help Desk Manager
  whd stop
  ```

```
cd /Library/helpdeskmanager
```

### Linux

The following procedures apply to RPM installations.

To start Help Desk Manager Services, run the following commands in a terminal window:

```
cd /usr/local/n-abletechnologies/helpdeskmanager/
sudo ./whd start
```

To stop Help Desk Manager Services, run the following commands in a terminal window:

```
cd /usr/local/n-abletechnologies/helpdeskmanager/
sudo ./whd stop
```
Configure and manage user authentication

When a browser submits an HTTPS request to Help Desk Manager, the SSL protocol requires the application to respond with a certificate to prove the authenticity of the server. The certificate contains a public key used for encryption and a digital signature from a Certification Authority (CA). The digital signature indicates which CA verified the authenticity of the server.

Web browsers currently trust most certificates signed by large CAs such as Verisign®, and you can use certificates signed by smaller CAs. When a browser does not recognize the CA certificate, the browser prompts you to trust the certificate.

When completed, the browser uses the public key in the certificate to encrypt information it sends to Help Desk Manager. Help Desk Manager decrypts the information using its private key. Similarly, Help Desk Manager uses its private key to encrypt information sent to the browser, and the browser uses the public key received in the certificate to decrypt it.

For details about setting up HTTPS, see Enabling HTTPS and Configure the server options.

For information on using and troubleshooting keys and certificates, see Working with Keys and Certificates, as well as Certificate Troubleshooting Tips.

Enable HTTPS

When a browser submits an HTTPS request to Help Desk Manager, the SSL protocol requires Help Desk Manager to respond with a certificate to prove the authenticity of the server. Begin your security configuration by enabling HTTPS.

Beginning in Help Desk Manager 12.5.1, you can enable HTTPS in Server Options located at Setup > General > Server Options.

To activate HTTPS in Help Desk Manager:

1. Configure the HTTPS listening port to monitor HTTPS requests.
2. Configure a URL port to monitor URLs generated by Help Desk Manager that point back to the application.
3. Enable Help Desk Manager to listen for HTTPS requests.
4. Enter the SSL connection port (if needed).
5. Restart Help Desk Manager.

This procedure requires changes to the whd.conf file. Review the following procedures before you enable HTTPS.
Configure the HTTPS listening port

Configure the listening port to listen for HTTPS requests. When you are finished, configure the port number used to monitor the requests.

1. Open an Explore window.
2. Navigate to:
   `<HelpDeskManager>/conf/whd.conf`
3. In the `whd.conf` file locate the `Ports` section.
4. Enter the port number Help Desk Manager monitors for HTTPS requests, which appears after the following entry:
   `HTTPS_PORTS=
5. Save your changes.

Configure a URL port

Your deployment may require Help Desk Manager to use a different port in URLs it generates to itself than the port the app server itself is running on. For example, you can configure a Web server to route requests for the default port (80) to go to the default Help Desk Manager port (8081). In this example, you can have Help Desk Manager URLs use port 80 instead of port 8081.

1. In the `whd.conf` file, locate the `URL` (optional) section.
2. At the bottom of this section, enter the desired URL port number after the following entry:
   `URL_HTTPS_PORT=
3. Save and close the file.

Enable listening for HTTPS requests

1. In the `whd.conf` file, locate the `HTTPS_PORT` entry.
2. Uncomment the entry.
3. Save and close the file.

Enter the SSL connection port

By default, Web browsers use port 443 for SSL connections. If you use a different port, include the port number in URLs that refer to Help Desk Manager.

For example, if your `whd.conf` file contains `HTTPS_PORT=8443`, connect to Help Desk Manager using the following URL:

`https://localhost:8443`

Restart Help Desk Manager

After you configure the `HTTPS_PORT` setting, restart Help Desk Manager. The application creates a new Java KeyStore at the following location:
<HelpDeskManager>/conf/keystore.jks

The new keystore contains a self-signed certificate.

Manage keys and certificates in Help Desk Manager

When a web browser submits an HTTPS request to Help Desk Manager, the SSL protocol requires the application to respond with a certificate to verify the authenticity of the server. The certificate contains a public key used for encryption and a digital signature from a Certification Authority (CA). The digital signature indicates which CA verified the authenticity of the server.

Trust certificates signed by CAs

Current Web browsers trust most certificates signed by large CAs (such as Verisign). You can also use certificates signed by smaller CAs. When a web browser does not recognize the CA, it prompts you to confirm your trust in the certificate.

After you confirm your trust, the web browser uses the public key in the certificate to encrypt information sent to Help Desk Manager. Help Desk Manager uses its private key to decrypt the information. Additionally, Help Desk Manager uses its private key to encrypt information sent to the web browser, and the browser uses the public key received in the certificate to decrypt it.

Store keys and certificates

Help Desk Manager stores its keys and certificates in a Java KeyStore located at <HelpDeskManager>/conf/keystore.jks. Porteclé (an open-source utility bundled with Help Desk Manager) provides a graphical user interface for administering the keystore on the Windows platform.

Generate a keypair and CSR

If you do not have a certificate for your server and are using the Windows platform, use Porteclé to generate a keypair and a Certificate Signing Request (CSR) to send to the CA. When completed, import the CA Reply certificate.

Import a certificate and private key to the keystore

If you have a certificate, import both the certificate and the primary key into the Java Keystore. Porteclé does not allow the private key to be imported by itself. You must combine it with its certificate in a Public-Key Cryptography Standards (PKCS) #12 file (such as P12 or PFX). In each case, the keypair must be aliased as tomcat and both the keypair and the keystore must be protected by the password specified in the KEystore_PASSWORD setting in the whd.conf file.

For more information about working with keys and certificates, see the following resources:

- Use default keypair aliases and passwords
- Add certificate chains
- Replace self-signed certificates with CA certificates
- Generate a new certificate
Add a Certificate Authority to an embedded Java CA certificate keystore
- Import an existing certificate
- Certificate troubleshooting tips

Use a default keypair alias and password

Help Desk Manager uses the Apache Tomcat web server. This server requires a key pair with a tomcat alias.

The default password to both the keypair and keystore is changeit, as shown below.

Tomcat requires identical keystore and keypair passwords. To use your own password, change the KEYSTORE_PASSWORD setting in the whd.conf file located in the <HelpDeskManager>/conf directory.

Replace a self-signed certificate with a CA certificate

When you create a new keypair using Portecle, it includes a self-signed certificate. To replace the self-signed certificate with a CA-signed certificate, generate a CSR for the keypair and submit the CSR to the CA. The CSR contains the public key and the name of the server in a format defined by the public-key cryptography standards #10 (PKCS10), which is typically given the P10 or CSR file name extension.

After you verify the applicant identity, the CA sends you a certificate you can use to replace the self-signed certificate in the keypair, as shown below.
This CA Reply (or CSR Reply) is typically an X.509 certificate file with a CER, CRT, PEM, or DER extension or a PKCS7 file with a P7B extension.

See Import an existing certificate and Certificate troubleshooting tips for additional information.

Add certificate chains

A trusted Certificate Authority (CA) can delegate to another CA. In this example, the certificate returned by the delegated CA is signed by the trusted CA, resulting in a certificate chain. Certificate chains can vary in length. The highest certificate in the chain—known as the root certificate—should be a self-signed certificate signed by the trusted CA.

Each certificate in the chain must be imported into the keystore so the complete chain can be sent to the web browser. If the CA Reply does not include the chain certificates, you must add them to the keystore before the CA reply.

The certificates must be imported in order of dependency.

To import the certificates:

1. Add the root certificate first.
2. Add the next chained certificate signed by the root certificate.
3. Add the next chained certificate (and so on) down to the CA reply.

Generate a new certificate using Porteclé

To generate a new certificate using Porteclé:

1. Create a new keypair or replace a keypair.
2. Generate a certificate signing request (CSR).
3. Import CA chain and root certificates.
4. Import the CA reply certificate.

If you currently have a certificate, see Import an existing certificate.

Create a new keypair

1. Open a File Explore window.
2. Launch the Porteclé batch file from the following directory: \Program Files\N-able Technologies\Help Desk Manager
3. Click the Files of Type drop-down menu and select: .jks
4. Enter a password.
   The default password is: changeit
   The keystore displays, with a keypair entry alias labeled tomcat. Help Desk Manager automatically creates this key pair.

Replace a keypair
1. Right-click an alias and select Delete to delete a tomcat keypair.

2. Click Tools > Generate Key Pair.
3. Select an algorithm and key size.
4. Enter 1024 or 2048, and then select RSA.
5. Click OK.
6. Enter the X.509 attributes for your certificate.
   a. Select a validity (in days) that matches the number of days your CA certificate will be valid. The validity period is the period you specified when you purchased the certificate from the CA.

   Typical validation periods are 6, 12, or 24 months.

   b. Enter a common name that matches the site used in the certificate.
      For example, if Help Desk Manager is hosted at support.example.com, your CN must be support.example.com.

   c. Enter an organization unit that distinguishes this certificate from other certificates for your organization.

   d. Enter an organization name, which is typically the name of your organization.

   e. Enter a locality name (such as a city name).

   f. Enter a state name.
      This is the full name of the state, province, region, or territory where your organization is located.

   g. Enter the country where your organization is located.
      This should be the two letter ISO 3166 country code for your country.

   h. (Optional). Enter a valid email address.
      This is an optional setting that your CA may use as the email address to send your certificate.

7. Click OK.
8. Enter the keypair alias tomcat, and then click OK.
9. Enter changeit in both fields for the keypair password, and click Enter.
   The new keypair aliased by Tomcat appears in the window.

**Generate a Certificate Signing Request (CSR)**

To use a Certificate Authority (CA) certificate in the Help Desk Manager Administrator Console, create a Certificate Signing Request (CSR).

A CSR is a block of encrypted text that is generated on the server where the certificate is used. The CSR contains information that will be included in your certificate, such as your organization name, common name (domain name), locality, and country.

Create a keypair before you generate a CSR.

1. Log in to the Help Desk Manager server.
2. Stop the Help Desk Manager service.
3. Navigate to the Help Desk Manager installation folder.
   Microsoft Windows: \Program Files\N-able Technologies\Help Desk Manager
   Red Hat/CentOS/Fedora Linux: /usr/local/n-abletechnologies/helpdeskmanager
4. Run:
   portecle.bat
5. Right-click the tomcat keypair and select Generate CSR.

![Generate CSR window](image)

The Generate CSR window displays.

6. Enter a name for the CSR to help you remember the domain it validates.
   For example:
   `support.example.com.csr`

7. Click Generate.

![Generate CSR dialog box](image)

The file is created.

8. Send the file to your CA to request your certificate.

   The CA returns an X.509 certificate in DER (*.cer, *.crt), PEM (*.pem, *.cer, *.crt) or PKCS#7 (*.p7b, *.p7c) encoding.

After you generate a CSR, **import the CA root and chain certificates**.

**Add a CA to the embedded Java CA cert keystore**

Help Desk Manager does not accept certificates signed by a Certificate Authority (CA) that is not trusted by its Java Virtual Machine (JVM). To import the certificate into the trust store, export the certificate to the CRT file and import the CA. Run Porteclé as an administrator to import the CA.

**Import certificates on Windows**

1. Open Porteclé at `<HelpDeskManager>/portecl.bat`.
2. Navigate to File > Open Keystore File.
3. Open the cacerts keystore at `<HelpDeskManager>/bin/jre/lib/security/cacerts`.
4. When prompted, enter the default password: `changeit`
5. Click Tools > Import Trusted Certificates and locate the `.crt` file.
6. Choose the following file and alias/name:
   FileSaveKeystore
7. Restart Help Desk Manager.

**Import the CA root and chain certificates**

Before you import your certificate into the keystore, check whether the certificate vendor requires you to include any other certificates to complete the certificate chain. Also, verify that you created a new keypair and generated a Certificate Signing Request (CSR).

1. Verify if the certificate vendor requires any other certificates to complete the certificate chain.
2. In the toolbar, click Tools and select Import Trusted Certificate.

3. Locate each of the certificates provided by your CA.
4. Import the certificates into the keystore.

**Import a CA reply certificate**

After you install the required root certificates, right-click the tomcat keypair and click Import CA Reply to import the CA response from the CA.
Import certificates with Base64-encoded format

If your certificate is in Base64-encoded format (with a PEM or CER extension) and you import the certificate with another file, an error may display. If this occurs, copy the certificate text that includes:

```
-----BEGIN CERTIFICATE-----
```

and ends with:

```
-----END CERTIFICATE-----
```

After you import your certificate reply, Porteclé reports that the certificate was imported successfully.

Import errors

If you import the CA Reply and Porteclé generates an error stating that the certificate cannot be trusted, the root certificate may not be included. To determine which certificate you need, temporarily import your CA Reply as a Trusted Certificate (rather than a CA Reply certificate) and examine the certificate details.

Locate the issuer property

Obtain a certificate from your CA that matches the Locate the Issuer property value and import the certificate into Porteclé as a trusted certificate. After you import this certificate into Porteclé (and any other certificates needed by its issuer), you can delete your own trusted certificate and re-import it as a CA Reply to your keypair.

Import an existing certificate

By default, Help Desk Manager creates a self-signed certificate. Since the certificate is not signed, it displays as not trusted. You can obtain a signed certificate from a Certificate Authority (CA), such as Comodo, GoDaddy, and others. To obtain a certificate, you can create a Certificate Request or use an existing certificate.

To use an existing certificate with Help Desk Manager, import your private key and your certificate chain.

Import a wildcard certificate

Large organizations may use a signed certificate (such as a wildcard certificate) throughout their domain. This certificate may be stored in a central location (such the Central Certificate Store (CCS) included with Windows Server 2012 and higher) and distributed on demand.

You can import a self-signed wildcard certificate in personal information exchange format (PFX) to your Help Desk Manager keystore. The import should include they and certificate in a single file.

If you cannot import the PFX file using the Help Desk Manager Administrator Console, import the file using Portecle, which is included with your Help Desk Manager program files. You can download the user documentation from the Porteclé website at portecle.sourceforge.net.

If Help Desk Manager is installed on another drive other than drive C, Porteclé will not be able to run. To work around this scenario, install a third party application such as Keystore Explorer. The
application uses a similar installation process. However, SolarWinds does not provide support this application.

1. Log in to the Help Desk Manager host server as an administrator.
2. Navigate to:
   
   C:\Program Files\N-able Technologies\Help Desk Manager
4. Enter your keystore password. This password is located in the whd.conf file.
   
   The default password is changeit.
5. Right-click tomcat and select Delete.
6. Click Tools > Import key pair.
   
   Do not import the certificate using Tools > Import Trusted Certificate, as this option will not include the private key.
7. Select the new self-signed or wildcard PFX certificate.
8. Enter the password.
   
   This password should be identical to the current keystore password.
9. Save the keystore.
10. Restart Help Desk Manager.

Import a self-signed certificate

Self-signed certificates do not contain CA certificates. As a result, use your group policy object (GPO) to push the PDX file to a trusted certificate store.

About PKCS#12 files

The PKCS#12 standard specifies a keystore format used for transferring private keys and certificates. PKCS#12 files typically use the p12 or PFX extension. If you have your private key and certificate bundled in this format, you can import it directly into Porteclé.

If a PKCS#12 (p12 or PFX) file is not available, use the OpenSSL pkcs12 command to generate the file from a private key and a certificate. If your certificate is on a Windows server, export a PKCS#12 file from the Microsoft Management Console.

Create a PKCS#12 keystore from a private key and certificate

OpenSSL is an open source software library that provides the pkcs12 command for generating PKCS#12 files from a private key and a certificate.

The private key and certificate must be in Privacy Enhanced Mail (PEM) format (for example, base64-encoded with -----BEGIN CERTIFICATE----- and -----END CERTIFICATE----- headers and footers).

Use these OpenSSL commands to create a PKCS#12 file from your private key and certificate:
openssl pkcs12 -export \
-in <signed_cert_filename> \
inkey <private_key_filename> \
-name ‘tomcat’ \
-out keystore.p12

If you have a chain of certificates, combine the certificates into a single file and use it for the input file, as shown below. The order of certificates must be from server certificate to the CA root certificate.

See RFC 2246 section 7.4.2 for more information about this order.

```bash
cat <signed_cert_filename> \
<intermediate.cert> [<intermediate2.cert>] 
... \
> cert-chain.txt
openssl pkcs12 -export \
in cert-chain.txt \
inkey <private_key_filename> \
-name ‘tomcat’ \
-out keystore.p12
```

When prompted, provide a password for the new keystore. This password is required for importing the keystore into the Help Desk Manager Java keystore.

Export a PKCS#12 keystore from the Microsoft Management Console

To use an existing certificate located on a server running Microsoft Windows:

1. Click Start > Run.
2. In the Run box, execute:
   ```bash
   mmc
   ```
   The Microsoft Management Console displays.
3. Select File > Add/Remove Snap-In.
5. Expand Console Root > Certificates > Personal.
   Your certificate is displayed.
6. Right-click your certificate and select More Actions > Export List.
7. Follow the Certificate Export Wizard prompts to export a Personal Information Exchange – PKCS #12 (.pfx) file.
   ```
   Note the location where you saved the PFX file.
   ```
8. Select the option to Include all certificates in the certification path.
9. Import the PKCS#12 file Into the keystore.
Import a PKCS#12 file into the keystore

When you import your file, ensure that:

- **Your certificate chain is intact in the Help Desk Manager keystore.** Double-click the certificate to inspect the certificate chain and view the certificate details. Use the left and right arrows at the top of the details panel to navigate through each certificate in the chain.
  
  If you do not see the full certificate chain, import the CA certificates first at Tools > Import Trusted Certificate and import your keypair again. Porteclé does not establish trust when a certificate is imported before the certificate that was used to sign it.

- **You import the certificate chain in the correct order.** Your root certificate is imported first, then the next certificate in the chain, and so on until you get to your own certificate.

- **Your certificate is aliased as tomcat.** The password for your certificate and the keystore must be identical and match the KEystore_PASSWORD setting in the <HelpDeskManager>/conf/whd.conf file (changeit by default).

If your keystore contains a default, unsigned Tomcat certificate, delete this certificate before you import your PKCS#12 file.

To import the contents of a PKCS#12 file into the Help Desk Manager keystore, you can:

- Convert the PKCS#12 keystore to a Java keystore
- Import the keypair containing your certificate

Convert the PKCS#12 keystore to a Java keystore

1. Click File > Open Keystore file.
2. Click Tools > Change Keystore Type > JKS and convert the keystore to a Java keystore.
3. Save the file in <HelpDeskManager>/conf/keystore.jks to overwrite the existing keystore file.

Import the keypair that contains your certificate

1. Open the Help Desk Manager keystore file.
2. Click Tools > Import Keypair.
3. Import the keypair containing your certificate into Porteclé.
   
   When prompted, select which keypair in your PKCS#12 keystore to import.

Certificate troubleshooting tips

If you experience issues when importing CA certificates, ensure that your settings are correct and there are no errors in your procedures.

Select the CA certs keystore

In Porteclé, navigate to Tools > Options and select Use CA Certs Keystore. When completed, Porteclé checks the built-in Java certificates to establish trust.
Import certificates in order

Porteclé requires you to import all certificates in order, beginning with the most trusted certificate (for example, root certificate, intermediate certificate issued by the root, the certificate issued by that certificate, and so on). If you import a certificate out of order, Porteclé generates an error stating it cannot establish trust. Confirming trust for any certificate other than the root certificate is not expected.

Additionally, do not import your own certificate using the Tools > Import Trusted Certificates menu option. This option is only for importing root and chain certificates. Instead, right-click your tomcat keypair and select Import CA Reply.

Use identical keypair and keystore passwords

Ensure that the password set for the keypair and the keystore are identical and match the KEystore_PASSWORD setting in the <HelpDeskManager>/conf/whd.conf file (the default password is changeit). To set the keypair password, right-click the tomcat keypair and select Set password. To set the keystore password, select Tools > Set Keystore Password.

Save your keystore

Ensure that your keystore is saved to:

<HelpDeskManager>/conf/keystore.jks

Enable your changes

Restart Help Desk Manager to ensure changes in Porteclé or the whd.conf file are enabled. For Windows systems, use the Help Desk Manager Start/Stop utilities in the Start menu instead of the Windows Services panel. For systems running Windows Server 2008 and later, right-click Run As Administrator.

Prevent certificate warnings

When the host name in the address used to browse to Help Desk Manager is different from the Common Name (CN) field in your certificate, a certificate warning displays. For example, a certificate warning displays if your certificate is for help.mycompany.com and you use localhost as the hostname in your URL.

Enable HTTP requests

When using HTTPS, ensure that your Setup settings are set correctly. To verify, click Setup and select Options. In the General Options screen, ensure that the Force HTTPS setting is set to Always. This setting ensures that links pointing to Help Desk Manager use HTTPS.

Troubleshoot and resolve issues

The following table provides resolutions to common certificate issues.
<table>
<thead>
<tr>
<th>ISSUE</th>
<th>RESOLUTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Porteclé says my CA Reply certificate cannot be trusted.</td>
<td>Porteclé does not trust sign your certificate. You must obtain a root certificate (or chain of certificates) from your CA that matches the issuer identity of your certificate and import them into Porteclé before importing your own certificate as a CA Reply. You can determine the issuer of your CA reply by importing your certificate into Porteclé as a trusted certificate (instead of a CA reply) and examining the certificate details. Review the certificate details of other certificates in your keystore to see if any of them match your certificate's Issuer attribute. If not, obtain a certificate from your CA that does match. After you import a certificate that matches your certificate issuer, as well as any other certificates needed to trust those certificates, delete your temporarily trusted certificate and re-import it as a CA reply to your keypair.</td>
</tr>
</tbody>
</table>
| After importing my certificate, Help Desk Manager does not start. | Open your whd.conf file in a text editor and ensure that:  
   - You commented out the SSL_PORT setting.  
   - Your DEFAULT_PORT and HTTPS_PORT settings are not conflicting with any other processes on the server.  
   - Your KEystore_PASSWORD setting matches both the password of your keystore and the password of your keypair. The default password is changeit. |
| After importing my certificate, Help Desk Manager is OK, but my browser shows a self-signed certificate. | Verify that your private key was generated using the DSA algorithm. DSA keys can fail with many browsers, including Internet Explorer. Try using RSA instead. |

**Deploy SSO with CAS 2.0**

The Central Authentication Service (CAS) is a single sign-on (SSO) protocol that enables a user to access multiple applications using one set of credentials. This protocol works in conjunction with the CAS server, which handles all the user connections to your Microsoft Exchange and LDAP servers.

You can deploy CAS server into Apache Tomcat or your own Help Desk Manager server.
Deploy CAS Server on Apache Tomcat

Before you deploy single sign-on with CAS 2.0 in your Help Desk Manager deployment, configure the CAS module for LDAP and Active Directory communications.

Download 7-Zip

The 7-Zip utility is a free open source file archiving utility you can use to complete this procedure.

1. Navigate to the 7-zip website.
2. Download and install the 7-Zip archive utility on your system.

Download the CAS Server file

1. Navigate to the Apereo website.
2. Click v3.5.1.
3. Scroll down and click cas-server-3.5.1-release.zip to download the ZIP file.
4. Extract the contents of the ZIP file to a local directory.
5. Open the cas-server-3.5.1 directory and click modules.
6. Copy the cas-server-webapp-3.5.1.war file to your local directory.

Edit the WAR file

1. Download the deployerConfigContext.txt file from the SolarWinds Documentation website and save the file to your local directory.
2. Open the file in Notepad and copy the content to your clipboard.
3. Right-click the cas-server-webapp-3.5.1.war file and select 7-Zip > Open Archive.
4. Double-click the WEB-INF directory. The directory displays.

![Directory Structure]

5. In the archive, right-click the deployerConfigContext.xml file and select Edit.
6. Paste the content in the archive file, overwriting the existing content.
7. In the updated `deployerConfigContext.xml` file, update the file variables for your deployment.
   a. Locate the following parameter. If you are using an SSL connection, use `ladps://` in the path.

   ```xml
   <property name="url" value="ldap://127.0.0.1:389" />
   ```

   b. Replace the `value` variable with the IP address of your LDAP server.

   c. Locate the following parameter:

   ```xml
   <property name="userDn" value="ldap_admin@yourdomain.com" />
   ```

   d. Replace the `value` variable with the email address of your LDAP administrator.

   e. Locate the following parameter:

   ```xml
   <property name="password" value="ldap_admin_password" />
   ```

   f. Replace the `value` variable with your LDAP admin password.

   g. Locate the following parameter:

   ```xml
   p:filter="sAMAccountName=%u" p:searchBase="DC=yourdomain,DC=com"
   ```

   h. Ensure that the LDAP `p:filter` search filter matches your LDAP configuration settings.

   i. Replace the `p:searchBase` variable with your domain settings.

   j. Save and close the file.

8. Download the `cas.properties.txt` file from the SolarWinds Documentation website and save the file to your local directory.

9. Open the `cas.properties.txt` file in Notepad and copy the content to your clipboard.

10. In 7-zip, right-click `cas.properties` and select Edit.

11. Paste the content to the `cas.properties.xml` file in 7-Zip, overwriting the existing content.
12. In the updated `cas.properties.xml` file, update the file variables for your deployment.
   a. At the top of the file, locate the following parameter:

   ```
   server.name=http://localhost:8080
   ```

   b. Replace the `server.name` variable with the Help Desk Manager server address. For example:
   ```
   http://whd.example.com
   ```

c. Under # Unique CAS node name, locate the following parameter:

   ```
   host.name=cas01.yourdomain.com
   ```

d. Replace `yourdomain.com` with your domain name.

   > The `host.name` parameter is used to generate unique service ticket IDs and SAML artifacts. This is usually set to the specific hostname of the machine running the CAS node. However, it could be any label as long as it is unique in the cluster.

   e. Save and close the file.
      Leave the 7-Zip archive open.

Download and apply the dependencies

1. Navigate to the following links and download the corresponding dependency files in JAR format to your local directory.

<table>
<thead>
<tr>
<th>Download Link</th>
<th>Dependency File</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAS Server Support LDAP v3.5.2</td>
<td><code>cas-server-support-ldap-3.5.2.jar</code></td>
</tr>
<tr>
<td>Commons Pool v1.6</td>
<td><code>commons-pool-1.6.jar</code></td>
</tr>
<tr>
<td>LDAptive Core v1.0.5</td>
<td><code>ldapaptive-1.0.5.jar</code></td>
</tr>
<tr>
<td>Spring LDAP v1.3.1 release (All)</td>
<td><code>spring-ldap-1.3.1.RELEASE-all.jar</code></td>
</tr>
</tbody>
</table>

> This file needs to be unzipped.
2. Drag all downloaded dependencies to the archive directory. All new and modified files display in the 7-Zip archive directory.

<table>
<thead>
<tr>
<th>Name</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>classes</td>
<td>228,886</td>
</tr>
<tr>
<td>lib</td>
<td>37,633,909</td>
</tr>
<tr>
<td>spring-configuration</td>
<td>37,452</td>
</tr>
<tr>
<td>unused-spring-configuration</td>
<td>13,973</td>
</tr>
<tr>
<td>view</td>
<td>69,569</td>
</tr>
<tr>
<td>cas-server-support-ldap-3.5.2.jar</td>
<td>67,510</td>
</tr>
<tr>
<td>cas-servlet.xml</td>
<td>12,693</td>
</tr>
<tr>
<td>cas.properties</td>
<td>1,812</td>
</tr>
<tr>
<td>commons-pool-1.6.jar</td>
<td>111,119</td>
</tr>
<tr>
<td>deployerConfigContext.xml</td>
<td>2,790</td>
</tr>
<tr>
<td>ldapitive-1.0.5.jar</td>
<td>749,182</td>
</tr>
<tr>
<td>login-webflow.xml</td>
<td>10,003</td>
</tr>
<tr>
<td>restlet-servlet.xml</td>
<td>2,211</td>
</tr>
<tr>
<td>spring-ldap-1.3.1.RELEASE-all.jar</td>
<td>338,222</td>
</tr>
<tr>
<td>web.xml</td>
<td>7,723</td>
</tr>
</tbody>
</table>

3. Extract the files to a separate directory.
4. Select all files.
5. Right-click and select 7-Zip > Add to archive.
6. In the Archive name field, enter cas.war and save the archive. The archive displays in the directory.

7. Close 7-Zip.

**Deploy CAS server on Apache Tomcat**

1. Stop the Help Desk Manager service.
2. Copy the cas.war file to the /bin/webapps directory in your Apache Tomcat deployment.
3. Start the Help Desk Manager service.
4. Verify that the HTTPS port is enabled on Apache Tomcat.
   - If the HTTPS port is not enabled, go to Enable SSL on Help Desk Manager in this procedure.
   - If the HTTPS port is enabled, go to Deploy the Help Desk Manager Server in this procedure.

**Complete your CAS server deployment**

Configure a Group Policy Object (GPO) to push the appropriate Windows login credentials to your Internet Explorer settings. This process enables authenticated users to access the Help Desk Manager server without having to log in. GPOs define the settings for your Windows server configuration, and Group Policies apply these settings.

See Configure a GPO to push Internet Explorer settings for more information.
Enable SSL on Help Desk Manager

1. On your Help Desk Manager system, open File Explorer and navigate to:
   `<HelpDeskManager>/conf`
2. In the `conf` directory, open the `whd.conf` file in Notepad.
3. In the file, comment out the following entry:
   `HTTPS_PORT=443`
4. Save and close the file.
5. Use Porteclé to create a new certificate.
   See Generating a New Certificate in Porteclé for more information.
6. Insert the certificate to the following location:
   `/conf/keystore.jks`
7. Restart Help Desk Manager.

Deploy CAS 2.0 on the Help Desk Manager server

1. On your Help Desk Manager system, click Setup > General > Authentication.
2. Click the Authentication Method drop-down menu and select CAS 2.0.
3. In the CAS login URL field, enter:
   `https://fqdn:port/cas/login`
4. In the CAS validate URL field, enter:
   `https://fqdn:port/cas/serviceValidate`
5. Under Verification certificate, click Upload and select a certificate that uses CAS for signing the responses.
   - Select `keystore.jks` to upload the Help Desk Manager Tomcat certificate.
6. In the Logout URL field, enter:
   `https://fqdn:port/cas/logout`
7. Click Save.
   You can now log in using CAS 2.0.

Configure a GPO to push the Internet Explorer settings

Configure a Group Policy Object (GPO) to push the appropriate Windows login credentials to your Internet Explorer settings. This process allows authenticated users to access the Help Desk Manager server without having to log in. GPOs define the settings for your Windows server configuration, and Group Policies apply these settings.

1. Log in to the Help Desk Manager domain using the Domain Administrator account.
2. Click Start and select Run.
3. In the Run field, enter the following command and then click OK:

```console
mmc
```

The Microsoft Management Console displays.

4. In the File menu, click Add/Remove Snap-In > Add.

5. In Available snap-ins, double-click Group Policy Management Editor and then click OK.


7. In Domains, OUs, and linked Group Policy Objects, click Default Domain Policy, and then click OK.

8. Click Finish, and then click OK.

9. In the Default Domain [yourdomain.com] Policy console tree, expand the following path:

   ```plaintext
   User Configuration, Policies, Windows Settings, Internet Explorer Maintenance, Connection
   ```


11. Clear the Automatically Detect Configuration Settings check box, and then click OK.

12. In the Default Domain [yourdomain.com] Policy console tree, go to:

   ```plaintext
   User Configuration > Policies > Windows Settings, Internet Explorer Maintenance, Security Zones and Content Ratings
   ```

13. Click Import the current security zones and privacy settings.

14. When prompted, click Continue and then click Modify Settings.

15. In the Internet Properties dialog box, click the Security tab.

16. Click Local Intranet, and then click Sites.

17. In the Add this website to the zone field, enter:

   ```plaintext
   *.yourdomain.com
   ```

18. Click Add.

19. Select the following checkbox:

   ```plaintext
   Require server verification (https) for all sites in this zone.
   ```

20. Click Close.

21. Click OK.
Manage clients

Clients typically interact with Help Desk Manager using the Web interface, but they can also be set up to work with Help Desk Manager using email.

- Create a client
- Import clients
- View client information
- Set up a client-initiated account
- Assign an existing asset to a client
- Merge duplicate HDM client accounts into one account
- Enable clients to re-open closed tickets

Create a client

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

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

SolarWinds MSP recommends allowing clients to create accounts only if their emails match the accepted domains.

1. In the toolbar, click Clients.
2. Click New Client.
3. Enter the client's name, credentials, and contact information.

   Required fields are bold.

4. Update other options as needed. See the tooltips for more information.
5. Click Save.

   If you selected E-mail Client When Account is Created, Help Desk Manager sends a confirmation email to the client.

View client information

1. In the toolbar, click Clients.
2. In the Client Name column, click a client name.

   The Client Info tab appears with the client's information.
To edit the client's information, click the pencil icon. Update the fields and check boxes as appropriate, and click Save.

**Set up a client-initiated account**

You can enable clients to create their accounts when they first log in to Help Desk Manager.

1. In the toolbar, click Setup and select Client > Options.
2. In the Client Can Create Account row, select Yes.
3. Click Save.

When completed, new clients see the following screen. To create a new account, they can click New Account.

Clients must be qualified to set up their own account. To verify, click Setup > Clients > Options. In the Client Options screen, ensure that the options are configured correctly. SolarWinds MSP recommends requiring domain matching for new clients.

**Assign an existing Device to a client**

You can assign Devices (such as printers and computers) to clients in your Help Desk Manager system. Using this process, a tech can identify and connect to a client Device to diagnose and resolve an incident or problem.

1. In the toolbar, click Devices.
2. Below the toolbar, click Search Devices.
3. Select the Basic Search tab.
4. In the tab window, select or enter the appropriate criteria to locate the Device.
   To locate the Device using a specific set of conditions, click the Advanced Search tab and enter your search criteria.
5. Click Search.
   Your results appear in the bottom window.
6. Click an available Device to attach to the client.
7. Click the pencil icon in the Device Basics tab to edit the asset properties.
8. In the Clients field, search and select the client for this Device.
9. Complete the remaining fields as required, then click Save.
   The asset is assigned to the client.

**Merge duplicate HDM client accounts into one account**

If you have two client accounts that use the same email address or user name, you can merge both accounts into one using the Bulk Action feature included with HDM.
1. Log in to HDM as an Administrator.
2. Select and delete the client accounts you want to remove.
   a. Click Clients in the toolbar.
   b. Click the Advance Search tab and search for the client accounts you want to remove.
   c. Select the results.
   d. Click + next to Bulk Action located at the bottom of page
   e. Select Delete option towards bottom of Bulk Action template.
   f. Select Apply.
3. Open the Merge Duplicate Clients tool by entering in the following URL in your web browser.
   http://[WHD_HOSTNAME]/helpdesk/WebObjects/Helpdesk.woa/wa/DBActions/mergeDuplicateClients
4. Log in to HDM as an Administrator.
5. Click Start, and then click OK.

Enable clients to re-open closed tickets

1. Log in to Help Desk Manager as an administrator.
2. Click Setup > Tickets > Status Types.
3. Click Closed in the Status Type Name column.
4. Click the Options tab.
5. Select the Clients Can Reopen Closed Tickets check box.
6. Click Save.
Manage tickets

Help Desk Manager uses tickets to manage service requests. These tickets can be initiated through email, created in the application, and imported from another application. Techs, admins, and clients can also manage tickets through email or through the application in a web browser.

Using Help Desk Manager, you can:

- Create a ticket using the Help Desk Manager tech interface or email.
- Create a quick ticket for a frequent issue, such as a forgotten password.
- Configure ticket status types to identify the ticket's current stage of completion and indicate whether action is needed.
- Configure ticket details such as selecting a request type, improving ticket resolution with ticket types, adding details to tickets with tech notes, and escalating or de-escalating a ticket.
- Set a ticket email alert to notify a tech, level tech, or group manager when a tech creates a new ticket.
- Create a ticket checklist to help techs assigned to several tickets ensure that all tasks in a ticket are completed before the ticket is closed.
- View and customize the ticket queue to quickly access list of tickets assigned to you or your tech group.
- Search for a ticket using a basic or advanced search.
- Perform actions on multiple tickets to apply a set of changes to multiple tickets at once.
- Update and resolve tickets by changing ticket information and performing actions on multiple tickets.
- Merge tickets and their associated attachments and messages into one ticket.
- Reassign tickets to a new employee when a technician leaves your department or organization.
- Create parent/child service relationships to change a service request to a problem ticket (or parent) and attach related service requests (or children) to the problem ticket for ticket automation.

Ticket flow

The following diagram details the Help Desk Manager ticket assignment logic.
The illustration includes numbered references for some processes. Listed below are the corresponding paths in the Help Desk Manager user interface to make any needed changes for each numbered process.
<table>
<thead>
<tr>
<th>Number</th>
<th>Related Path in Help Desk Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Setup &gt; Techs &gt; Tech Groups &gt; [Group] &gt; Request Types Supported</td>
</tr>
<tr>
<td></td>
<td>See Define Tech Groups for more information.</td>
</tr>
<tr>
<td></td>
<td>In the Request Types Supported tab, view the supported request types.</td>
</tr>
<tr>
<td>2</td>
<td>Setup &gt; Tickets &gt; Request Types &gt; [Request Type] &gt; Lead Technician</td>
</tr>
<tr>
<td></td>
<td>See Define Request Types for more information.</td>
</tr>
<tr>
<td>3</td>
<td>Setup &gt; Techs &gt; Tech Groups &gt; [Group] Tech Group Levels &gt; Level 1 &gt; Auto Assign Tickets To</td>
</tr>
<tr>
<td></td>
<td>See Define Tech Groups for more information.</td>
</tr>
<tr>
<td>4</td>
<td>Setup &gt; Techs &gt; Tech Groups &gt; [Group] &gt; Level 1 &gt; Assigned Techs</td>
</tr>
<tr>
<td></td>
<td>See Define Tech Groups for more information.</td>
</tr>
<tr>
<td></td>
<td>To select e-mail recipients for new tickets, go to:</td>
</tr>
<tr>
<td></td>
<td>Setup &gt; Techs &gt; Tech Groups &gt; [Group] &gt; Tech Group Levels &gt; Level 1 &gt; Email Recipients of Client Updates</td>
</tr>
<tr>
<td></td>
<td>See Define Tech Groups for more information.</td>
</tr>
<tr>
<td>5</td>
<td>Setup &gt; Tickets &gt; Request Types &gt; [Request Type] &gt; Lead Technician</td>
</tr>
<tr>
<td></td>
<td>If the Tech is marked On Vacation, the ticket is assigned to the Backup Tech in the Tech's profile.</td>
</tr>
<tr>
<td></td>
<td>See Define Request Types for more information.</td>
</tr>
<tr>
<td>6</td>
<td>Setup &gt; Techs &gt; Tech Groups &gt; [Group] &gt; Tech Group Info &gt; Group Manager</td>
</tr>
<tr>
<td></td>
<td>You can use Customer Group Manager instead of the specified Tech at:</td>
</tr>
<tr>
<td></td>
<td>If this Tech is marked On Vacation, the ticket is assigned to the Backup Tech in the Tech's profile.</td>
</tr>
<tr>
<td></td>
<td>See Define Tech Groups for more information.</td>
</tr>
<tr>
<td>7</td>
<td>Setup &gt; Techs &gt; Tech Groups &gt; [Group] &gt; Techs Assigned</td>
</tr>
<tr>
<td></td>
<td>See Define Tech Groups for more information.</td>
</tr>
</tbody>
</table>
### Create a ticket

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

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

In addition, admins can define Help Desk Manager tasks (scripts) which will create certain types of tickets automatically.

#### Create a ticket through the web interface

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

💡 You can launch DameWare MRC from a customer ticket or from the Help Desk Manager Toolbar.

### Create a ticket through email

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

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

### Create a quick ticket

Use quick tickets to create identical tickets for repetitive issues, such as a forgotten password. You can create a quick ticket template to define the fields in quick tickets.

Techs and admins complete the Client and Location information based on the request type in a quick ticket before the ticket is assigned to help desk personnel.

1. In the toolbar, click Tickets.
2. In the Tickets screen, click New Ticket.
3. In the New Ticket screen, locate the Quick Ticket section and click the plus icon to create a ticket.
4. In the Quick Ticket Details screen, complete the fields and drop-down menus for your quick ticket.
5. At the bottom of the ticket, locate the Save Quick Ticket as field.
6. In the field, enter a name for this quick ticket type.
7. Click Shared to allow others to use this quick ticket template.
8. Click Save.
9. Click Apply.

**Configure ticket status types**

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

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

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>The issue requires a resolution. This is the default status of a ticket when it is created.</td>
</tr>
</tbody>
</table>
| Pending| The ticket was received, but it is currently on hold. For example, a status indicates that a feature request was received but management has not yet decided if the request will be granted.  
This status can also indicate that the assigned tech is waiting for information from a client. You can also create a new status for this purpose.  
The Count Time setting for this status type indicates whether the time in this status is included in the ticket's total open time. When this option is deselected, the time spent in this status will extend the default ticket due date.  
For example, a ticket is initially set to a status that counts time. If the status is changed to one that doesn't count time for four business hours, and then is changed back to a status that counts time, then four hours will be added to the default due date of that ticket. |
| Resolved| The tech has provided a solution and is waiting for the client to confirm the resolution.  
By default, when a tech changes a ticket status to Resolved, the client receives an email asking if the issue is resolved to their satisfaction. If the client clicks Yes, the ticket status changes to Closed. If the client clicks No, the ticket status changes to Open. |
| Closed | The client confirmed that the issue is resolved. You can also configure Help Desk Manager to automatically close a ticket if the client does not respond to the confirmation request within the specified time period. |
| Canceled | The client is no longer experiencing the problem, or no longer needs the service requested in the ticket. |
You can create a Help Desk Manager to show the total amount of time or the average amount of time spent in each status.

Modify a preconfigured status type

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

1. On the toolbar, click Setup.
2. Select Tickets > Status Types.
3. In the list of status types, click Resolved.
   By default, the Resolved status type is configured to send an email prompting clients to confirm that their issue was resolved.
4. Set Automatically Close Ticket After to 3 Week(s).
   If a client does not respond to the confirmation email within three weeks, the ticket status is automatically set to Closed.
5. Click Save.

Creating a new status type

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

1. On the toolbar, click Setup.
2. Select Tickets > Status Types.
3. Click New.
4. Enter a Name and Description.
5. Change the Display Order so that tickets with this status are displayed above Closed, Canceled, or Resolved tickets.
6. Clear the Count Time check box.
   The time spent in this status is not included in the ticket's total open time, and the ticket's due date is extended by the amount of time spent in this status.
7. Click Save.
   The new status type is displayed in the list.
   
   ! You must click Save on the Status Types tab before you click the Options tab. If you do not click Save, the information you entered on the Status Types tab is lost.

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

11. Click Save.

**Set up an automated reminder for ticket status**

You can set up automated email reminders to clients about ticket status and priority. To begin, enable the client reminder functionality in the console. When you are finished, set up the client reminder interval settings.

**Enable the client reminder**

1. Click Setup > Tickets > Status Type.
2. Click a status type for the reminder.
   For example, Pending.

<table>
<thead>
<tr>
<th>Status Type Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open*</td>
</tr>
<tr>
<td>Pending</td>
</tr>
<tr>
<td>Closed*</td>
</tr>
<tr>
<td>Cancelled*</td>
</tr>
<tr>
<td>Resolved</td>
</tr>
</tbody>
</table>

3. In the Status Types tab, select the Client Reminders checkbox.

4. Click Save.
5. Repeat step 1 through step 3 to set up client reminders for the remaining, required status types.
Set up the client reminder interval

1. Click Setup > Tickets > Priority Types & Alerts.
2. In the Priority Types column, click a priority type that requires a reminder email.
   For example, Urgent.

<table>
<thead>
<tr>
<th>Priority Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remote Students</td>
</tr>
<tr>
<td>Urgent</td>
</tr>
<tr>
<td>High</td>
</tr>
<tr>
<td>Medium</td>
</tr>
<tr>
<td>Low</td>
</tr>
</tbody>
</table>

3. In the Priority Types Details page, select the Client Reminder Interval checkbox and select the targeted interval for the reminder email.
   For example, once every business day.

4. Click Save.
5. Repeat step 1 through step 3 to set client reminders for the remaining required priority types.

Select the email recipients for auto-close tickets

You can configure Help Desk Manager to respond differently when a ticket auto-closes. For this situation, you can enable the application to send email to the recipients set in the ticket or reset the ticket recipients to Tech, Client, or Cc.

1. Log in to Help Desk Manager as an administrator.
2. Click Setup > Tickets > Status Types.
3. In the Status Type Name column, click Closed.
4. Click the Options tab.
5. Select the individuals who receive mail when the ticket automatically closes.

<table>
<thead>
<tr>
<th>E-Mail Recipients After Auto Close</th>
<th>Use Ticket Settings</th>
<th>Override</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Select Use Ticket Settings to send email to the recipients set in the ticket.
Select Override and then select Tech, Client, or the Cc field.
6. Click Save.

Configure ticket details

When you click Tickets in the toolbar, you can access My Tickets and Group Tickets under the toolbar if:

- You belong to a group with assigned tickets
- The tickets are directly assigned to you.
To view the ticket detail page, you can:

- Click Tickets in the toolbar, and then click a ticket number.
- Click My Tickets, and then click a ticket number.
- Click Group Tickets, and then click a ticket number.
- Use the search options to locate the ticket of interest.

To assign a technician to the ticket, select an option in the Assign To field or click the Assigned Tech drop-down menu and select a technician.

To escalate the ticket, click above the Dates tab.

**Troubleshoot incorrect ticket detail dates**

The Ticket Details tab displays the following dates:

- Open Date
- Last Updated
- 1st-Response Date
- Closed Date

If the Ticket Details tab displays incorrect Open Date and 1st-Response Date values, do the following:

1. Log in to Help Desk Manager as an administrator.
2. Click Setup > General > Time & Place.
3. In the Business Zones tab, click your default time zone.
4. Verify that the Date Format and Time Format values are entered correct.
   Use the following case-sensitive characters:

<table>
<thead>
<tr>
<th>CHARACTER</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>M</td>
<td>Month in year</td>
</tr>
<tr>
<td>d</td>
<td>Day in month</td>
</tr>
<tr>
<td>y</td>
<td>Two-digit year</td>
</tr>
<tr>
<td>yyyy</td>
<td>Four-digit year</td>
</tr>
</tbody>
</table>

5. Verify that the Business Hours and Work Days settings are correct.
6. Click Save.

**Select a request type**

Request types define the issue type and the required action. They also determine custom fields that populate in the ticket, techs who can be assigned to the ticket, and the method used to route the ticket to a tech.

Help Desk Manager includes default request types for:
- Email or Outlook
- Facilities
- Hardware
- HR
- IT General or Other
- Network
- Phone or Voicemail
- Printer or Toner

When you create a request type, ensure that all Help Desk Manager request types used for Dameware integration do not include required custom fields.

**Improve ticket resolution with ticket types**

Ticket types group multiple tickets together on the same issue as Child tickets of a Parent ticket. This allows you to address a Child ticket when you edit the Parent ticket.

Help Desk Manager uses three types of tickets to facilitate this type of ticket resolution: Service, Problem, and Incident.

<table>
<thead>
<tr>
<th>Ticket Type</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Request</td>
<td>A request submitted by a client to Help Desk Manager for assistance, such as information, advice, or access to an IT service.</td>
<td>Reset a password&lt;br&gt;Access a shared network resource&lt;br&gt;Replace a printer toner cartridge</td>
</tr>
<tr>
<td>Problem Ticket</td>
<td>A ticket that provides the root cause for attached Incident and Child tickets.&lt;br&gt;These tickets are based on an initial Service Request or an automatic trouble ticket from a system integrated with Help Desk Manager.</td>
<td>The HR printer has a paper jam</td>
</tr>
<tr>
<td>Incident Ticket</td>
<td>A ticket that describes a new occurrence of an issue currently documented in an existing Problem ticket.&lt;br&gt;The Incident ticket can be attached to a Problem ticket. After it is attached, the Incident ticket becomes a Child ticket.&lt;br&gt;Incident tickets are created from a Service Request or an automatic trouble ticket from a system integrated with Help Desk Manager.</td>
<td>HR department personnel receive an error message when they send a document to the HR printer</td>
</tr>
</tbody>
</table>
When a ticket type is set to Problem in the Ticket Details tab, the ticket becomes available in the Problems drawer, as shown below.

This capability provides a parent root cause for related tickets. When a ticket is linked to a Problem ticket, it becomes an Incident ticket. Changing the ticket back to a Service Request removes the link to the Problem ticket.

When a Parent ticket is closed, all of its Child tickets close as well. When you view a Parent ticket, you can view notes from Child tickets. When you view an Incident ticket, you can also view the notes from the Problem ticket.

Change ticket relationships

When you create or modify parent and child tickets, the following rules apply:

- Changing the existing ticket type in the Ticket Details > Details pane to another selection removes all existing ticket relationships, whether they are Parent/Child or Problem/Incident relations.
- Only Service Requests can have Parent or Child tickets.
- A ticket cannot be linked until it is saved.

Link and unlink incident and problem tickets

Use the Parent-Child feature in Problem tickets to manually link multiple reports of a single issue. The Problem ticket is considered a Parent and each linked Incident ticket is considered a Child ticket.

**Link an Incident ticket to a Problem ticket**

1. In the Tickets screen, click a ticket.
2. In the Ticket Details tab, ensure that Incident is the active ticket type.
3. Click the Problems tab.
4. Enter or select a ticket number, request type, status, or search term in any existing Problem tickets that you can transform into a Parent ticket.
5. Click Search to find Problem tickets relating to your Incident ticket.
6. In the search results, click View to preview possible Parent tickets.
7. Click Link to assign the Problem ticket as a Child ticket.

**Unlink a Problem ticket from an Incident ticket**

1. In the Tickets screen, click a Problem ticket.
2. In the Ticket Details tab, ensure that Problem is the active Ticket Type.
3. Scroll down to the Linked Incidents tab.
4. Click the Unlink Problem button.
   The Parent Problem ticket is no longer linked to the Incident ticket.
Add details to tickets with tech notes

You can add additional information to tickets using tech notes. A ticket can have multiple notes and can be added by any technician. Tech notes can contain basic HTML tag or Bulletin Board Code (BBCode) tag formatting.

Techs can also add billing rates to tech notes. To enable, click Setup > Parts & Billing > Options and select the Parts & Billing Enabled check box. When enabled, Help Desk Manager will track parts, inventory, and billing on tickets.

Add an FAQ to a tech note

When an FAQ describes the resolution to an issue or provides information associated with a ticket, you can link the FAQ to the ticket.

1. Open the ticket details page.
2. In the Notes section, click the creation date to open a new note, or click New to add a new note.
3. Click the Link FAQ button.
4. In the FAQ Search dialog box, search for the FAQ.
5. Click the Link FAQ button on the right side of the FAQ’s row.
   A link to the FAQ is added to the note.
6. Click Save to save the note.

Create a new tech permission

Administrators can re-assign technicians, change ticket status, and delete tickets. Technicians have various levels of access depending on their tech permission set.

1. In the toolbar, click Setup and select Techs > Tech Permissions.
2. In the Tech Permissions screen, click New.
3. In the Permissions screen, enter a name in the Permission Name field for the new permission.
4. Select the permissions for your targeted user.
   Click the help icon or click the tooltips for more information about each option.
5. Click Save.
   Your permissions are saved.

Send email to ticket recipients

When you save a ticket, you can email the ticket to a client, assigned technician, level techs, group manager, or other addresses in the ticket Recipients tab using the cc: and bcc: fields. Select the recipient check boxes and add cc: or bcc: addresses, and then click Save & Email.

Clicking Save does not generate an email unless the ticket is re-assigned. In this case, the newly-assigned tech receives an email. Click the lock to toggle the ticket privacy setting. When tickets are private, users without permission cannot see the tickets.
Escalate and de-escalate tickets

Escalating or de-escalating a ticket moves an assigned ticket to a higher or lower tech group level, respectively.

If a higher tech group level is available, the ticket is escalated to that level. If a ticket still requires escalation and a higher level tech group is not available, the ticket escalates to the group manager. If further escalation is required, the ticket can be escalated to the lead tech for the request type. When the ticket is escalated, it inherits the email settings from the tech group level settings and ticket assignment strategy.

When a ticket is escalated or de-escalated, a tool tip provides more information about the escalation or de-escalation, as shown below.

When the assigned tech is reassigned, Help Desk Manager sends escalation or de-escalation emails to the current and former techs assigned to the ticket.

1. In the Tickets page, click the ticket you want to escalate.
2. In the Ticket Details tab, locate the Details tab.
3. Click Escalate to send the ticket to a higher-level tech group.
   Click De-escalate to send the ticket to a lower-level tech group.
   
   When you escalate or de-escalate the ticket to the maximum level, the Escalate and De-escalate icons disappear.

4. Click the History tab.
5. Review the ticket assignment history for accuracy.

Set up a ticket email alert

You can configure HDM to notify a tech, level tech, or group manager when a tech creates a new ticket.

1. Log in to HDM as an administrator.
2. Click Setup > Techs > Tech Groups.
3. Under Group Name, click a group.
   For example, General.

   Group Name
   
   General

4. Click the Tech Group Levels tab.
5. In the Level column, click the appropriate level.
   For example, Level 1.

   ![Level](image)

6. In the Force Email Notifications To section, select Tech, Level Techs, and/or Group Manager.

   ![Notification Settings](image)

   *If you select Level Techs, the email will be filtered by the location and department groups. If the ticket has no location or department groups, all level members receive an email.*

7. Select the Send on Ticket Creation Only checkbox, and click Save.
   The tech, level techs, or group manager (based on your selection) will now receive an alert when a ticket is created and assigned to this group.

### Create a ticket checklist

Beginning in Help Desk Manager 12.6, you can add a checklist to a Help Desk Manager ticket. The checklist helps a tech assigned to several tickets ensure that all tasks in a ticket are completed before the ticket is closed.

Administrators can [create a ticket checklist template](#) that lists the tasks required for a specific request type—for example, on-boarding a new employee. When completed, the administrator can assign the template to the request type, share the template with all techs, and delete the template when necessary.

Techs can apply shared templates to a ticket. If the ticket requires a tech to complete a set of tasks that are not included in your checklist templates, you can manually [add a checklist from within the ticket](#). Any changes to a template (such as editing the template, selecting an item, or deselecting an item) are recorded in the ticket history.

### Create a ticket checklist template

When you create a new Help Desk Manager ticket, the ticket may include several [child tickets](#) that require techs from HR, Facilities, and other areas of your organization to complete service requests. For example, the ticket may include a request type called New Hire that automatically generates child tickets for setting up a workspace, computer systems, and cube for the new employee. To ensure that all tasks are completed, you can create a checklist template that includes a checklist items for each service request and apply the ticket to the parent request type.

A checklist template can include up to ten required or not-required checklist items. After you create the checklist template, assign the template to a request type. When a new ticket is created with the targeted request type, the checklist items are pulled from the template and added to the ticket. This process helps you ensure that all tasks associated with the parent ticket (such as child tickets) are completed by the assigned techs.
1. Log in to the Help Desk Manager Administrator Console.
2. Click Setup > Tickets > Checklist Templates.
3. In the Checklist Templates window, click Create New.

![Checklist Templates](image)

4. In the Checklist Name field, enter a name for the template.

![Create Checklist Template](image)

5. (Optional) Enable Select Shared Template With Everyone to share the template with all techs.
6. In the Add New Item field, enter a checklist task, and click Add.

7. Repeat step six for all remaining checklist items.

   You can add up to 10 checklist items for each template.
8. (Optional) Select Required next to each checklist item that the tech must complete before the ticket can be closed.

![ADD NEW ITEM](image)

9. (Optional) Automatically assign the checklist to a request type.

After you create a checklist template, you can assign the template to a request type at any time.

a. Click Add Another.

![Automatically Assign To Request Type](image)

b. Assign the checklist template to a request type. For example, Facilities.

The request type displays in the drop-down menu.
10. Click Save.

The new template is added in the Checklist Template window.

The icon indicates that you chose to share the template with everyone in step 5.

If you assigned the checklist to a template, the Assigned to field includes the name of the assigned request type.

Assign a ticket checklist template to a request type

When you create a checklist template, you can assign the template to a request type when you create the template. If you skipped this procedure, you can assign a template to a request type at any time.

1. Log in to the Help Desk Manager Administrator Console.
2. Click Setup > Tickets > Checklist Templates.
3. In the Create Checklist Template window, select the targeted checklist template, and then click Edit.

![Create Checklist Template window]

The icon indicates that you chose to share the template with everyone in step 5.

4. Click Add Another.

![Automatically Assign To Request Type]

5. Assign the checklist template to a request type. For example, Facilities.

![Automatically Assign To Request Type]

The request type displays in the drop-down menu.
6. Click Save. The template is assigned to the request type. The Assigned to field includes the request type name.

![Checklist Template](image)

The icon indicates that the template is shared with everyone.

**Add a unique checklist from within a ticket**

If a ticket requires a unique list of checklist items that are not included in your checklist templates, you can add the checklist items to a new or existing ticket.

1. Log in to the Help Desk Manager Administrator Console.
2. Open a new or existing ticket.
3. Click the Ticket Details tab.
4. In the Details section, locate the Checklist field and click Add checklist.

![Checklist Add](image)

5. In the Add Checklist window, enter a checklist item in the Add New Item field using English letters and characters.

![Add New Item](image)

If you created a checklist template that includes the checklist items you need, click the Load From Template drop-down menu and select a template.
6. Click Add.

The checklist item displays in the Add Checklist window.

7. (Optional) Enable Required to require this checklist item to be completed before you can close the ticket.

8. Repeat step 4 through step 7 to add or remove any additional checklist items. Enable Required for each checklist that is required to close the ticket.

To populate the window with checklist items from a shared template, click the Load From Template drop-down menu and select the template.
9. (Optional) Save the checklist as a template.
   a. Click the Save Checklist as a Template checkbox.
   b. Enter a template name.

   ![Save Checklist as a Template](image)

   c. Click Save As Template.
   The template is saved to the Checklist Templates window.

10. Click Save.
    The checklist items display in the ticket.

   ![Checklist](image)

**View and customize the ticket queue**

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

**Display a list of tickets**

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

1. In the toolbar, click Tickets.
2. In the menu bar, select one of the following to display a list of tickets:

<table>
<thead>
<tr>
<th>OPTION</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Tickets</td>
<td>Displays tickets assigned to you.</td>
</tr>
<tr>
<td>Group Tickets</td>
<td>Displays tickets assigned to any tech in a tech group you belong to.</td>
</tr>
<tr>
<td>Flagged Tickets</td>
<td>Displays tickets that you flagged.</td>
</tr>
<tr>
<td>Recent Tickets</td>
<td>Displays tickets that you recently edited.</td>
</tr>
</tbody>
</table>

**Tickets displayed in the Group Tickets view**

The Group Tickets view is filtered in the following order:
Tech Group
Tech Group Level
Location Group
Department Group
Companies

Techs with administrator privileges do not affect the Group Tickets view.

If the Group Tickets view does not display HDM tickets for each tech, ensure that each tech is a member of each parameter to view the tickets in those views. Add the tech as a level tech in all tech groups and levels, and any location or department groups and company that the tech should view.

Additionally, go to Setup > Tickets > Status Types and click each status type (such as Open and Resolved) in the Status Type Name column. In the Status Types tab for each name, ensure that the Include in My/Group Tickets Filter checkbox is selected.

Include in My/Group Tickets Filter

About the ticket queue

The ticket queue provides information about each ticket in the list.

In the first column, you can select tickets for bulk actions, such as merging tickets.

The second column provides color-coded ticket information:

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

Click the flag column to flag a ticket or to remove an existing flag. Flagging a ticket adds it to your Flagged Tickets queue, which you can access by clicking Flagged Tickets in the toolbar. Use flags to mark tickets that require immediate follow-up or special attention. If a ticket is unassigned, the last column displays the Assign to Me icon 🔄. You can click the icon to assign the ticket to yourself.

Techs can only see their assigned tickets in the My Tickets view, as well as tickets assigned directly to a tech group they belong to in the Group Tickets screen. These two restrictions apply to all accounts, including admin accounts.

See Set up tickets to configure the information in the My Tickets and Group Tickets screens.

Any changes you apply to the column settings do not impact other tech accounts.
Sort the ticket queue

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

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

Customize your view of the ticket queue

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

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

Search for a Help Desk Manager ticket

You can search for a Help Desk Manager ticket using a basic or advanced search.

A basic search locates tickets based on the search criteria you enter in a set of predefined fields. An advanced search locates tickets based on any number of search criteria you enter. The search criteria are a set of conditions that must be met.

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

Perform a basic search

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

Perform an advanced search

1. On the top toolbar, click Tickets.
2. On the second toolbar, click Search Tickets.
3. Click the Advanced Search tab.

4. Specify the conditions that the ticket must meet, starting from the left and continuing to the right. Click + in the ALL or ANY section to add additional conditions.
   - Every condition specified in the ALL group must be met for a ticket to be found. These conditions are evaluated with a Boolean AND operator.
   - At least one condition specified in the ANY group must be met for a ticket to be found. These conditions are evaluated with a Boolean OR operator.
   Enter conditions in either or both groups. See the following section for examples of advanced searches.

5. Save this query so you can run it again.
   a. Enter a name in the Save Query as field.
   b. Select Shared to make the query available to other techs.
   c. Click Save.

6. Click Search to run the query.

Advanced search examples

Advanced searches can help you answer a variety of questions.

The following search example locates tickets assigned to a specific tech that have not been updated within the last ten days.

```
Tickets matching ALL of these conditions:

<table>
<thead>
<tr>
<th>Tech</th>
<th>is</th>
<th>Acevedo, Ricardo</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Updated</td>
<td>prior to</td>
</tr>
</tbody>
</table>
```

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

The following example locates tickets containing "network outage" in a client note, request details, or subject.

```
Tickets matching ALL of these conditions:

... and ANY of these conditions:

<table>
<thead>
<tr>
<th>Client Note</th>
<th>Contains</th>
<th>network outage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request</td>
<td>Contains</td>
<td>network outage</td>
</tr>
<tr>
<td>Subject</td>
<td>Contains</td>
<td>network outage</td>
</tr>
</tbody>
</table>
```

The following example locates tickets assigned to a tech group with an Urgent priority on escalation level of two or higher.
Perform actions on multiple tickets

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

Create a new bulk action

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

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

Edit a bulk action

1. Log on to Help Desk Manager as an administrator.
2. Click Tickets.
3. In the menu bar, click the appropriate ticket screen.
   The Ticket screen updates with the tickets for your selected ticket view.
4. Click the Bulk Action drop-down arrow and select the bulk action you want to edit.
5. Click the Pencil icon.
6. Update the appropriate fields in the screen as required.
7. Click Save to save your template.
Apply a bulk action to a group of tickets

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

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

Update and resolve tickets

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

Ticket information

Each Help Desk Manager ticket includes tabs that provide information about clients, assets, tickets, and parts and billing. The following table provides details about each tab.

<table>
<thead>
<tr>
<th>TAB</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Info</td>
<td>Identifies the client who requested support. This information is automatically populated from the client account.</td>
</tr>
<tr>
<td>Asset Info</td>
<td>Identifies assets (such as PCs and servers) associated with the client or support request.</td>
</tr>
<tr>
<td>Ticket Details</td>
<td>Contains specific information about this request, incident, or problem.</td>
</tr>
<tr>
<td>Parts and Billing</td>
<td>Identifies parts ordered to complete this request and information about parts billing.</td>
</tr>
</tbody>
</table>

Edit a ticket from the Web Console

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

SolarWinds does not recommend opening multiple web browser tabs to edit your tickets.
1. Search for the ticket you want to edit, or locate it in your
The Ticket Details tab is displayed.
3. Select a ticket type.
A service request is a planned request for a new or modified service. When you hire a new employee, you can create service requests for setting up a workspace, purchasing a laptop computer, and assigning a telephone number.
An incident is an unplanned event that causes an interruption or reduction in service. If the new employee receives a laptop computer and cannot connect to the corporate network, you create a service request ticket that a tech can later classify as an incident. If you encounter two or more similar incidents, you can link the incident tickets to a problem ticket.
A problem identifies the root cause of one or more incidents. If the new employee and several other employees cannot log in to the corporate network, you can create a service request ticket that a tech can later classify as a problem. The tech can then link all incident tickets as supporting incidents (or children) to the problem ticket.
4. Select the request type that accurately reflects the type of ticket. The ticket is transferred to the tech group that services the request type you selected. Add a note to explain the reason you changed the request type.
5. Select the Priority.
The priority determines the ticket's due date, and should reflect the severity of the issue and the people or affected business functions. Select one of the following:
  - Urgent: a failure that severely impacts critical operations.
  - High: an issue that degrades response times or affects normal operations.
  - Medium: an issue that affects a small number of users or an individual user. A work-around is available.
  - Low: questions or requests for information.
6. Under Status & Schedule, click the Status drop-down menu and select the ticket status.

   A Pending status can impact a ticket due date based on the Count Time setting. If the Count Time checkbox is not selected for this status, the time the ticket is in Pending status is not counted towards the due time. If the Count Time checkbox is selected, the time a ticket is in Pending status is counted towards the due time. As a result, the ticket can be either on time or past due. See Configure Status Types for details.

7. Add or update the remaining ticket fields.
8. Click Save to save the ticket or Save & Email to save the ticket and send an email to the specified recipients.

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

**Update tickets using email**

When a ticket is assigned to you, Help Desk Manager sends you an email. Respond to the email to update the ticket.
1. In the Notes section, select the action you want to perform. You can add a note, add a hidden note, or delete the ticket.

2. Hold down the Control key and click the ticket number.
   Help Desk Manager creates an email similar to the following example. In this example, the tech chose to add a note that is visible to the client.

   ![Email Example](example_email.png)

3. Verify the options listed in the subject line.
   - The Action is based on the action you selected. For example, if you select Add Note, the action in the Subject is Tech Update.
   - The Email Client option defaults to YES. Enter NO if you do not want to email the client. (This option is not case-sensitive.)

4. Enter your note as the body of the email and send the email.

**Perform actions on multiple tickets**

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

**Create a new bulk action**

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

1. In the toolbar, click Tickets.
2. In the menu bar, select a ticket screen.
3. Scroll to the bottom of the screen and locate the Bulk Action box.
4. Click [+] next to Bulk Action.

5. On the Bulk Action Details screen, specify values in the fields that you want the bulk action to change. Leave all other fields blank.

6. In the Save Bulk Action as field, enter a name for this bulk action.

7. (Optional) Select Shared to share this bulk action with other users.

8. Click Save.

   The saved bulk action will be listed in the Bulk Action drop-down menu in the Tickets screen.

Apply a bulk action to a group of tickets

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

1. In the toolbar, click Tickets.

2. In the menu bar, select a ticket screen, or select Search Tickets and search for the tickets you want to change.

3. Select the tickets for bulk action.
   - To select all tickets on the page, select the check box above the first column.
   - To select individual tickets, select the check box in the first column of each ticket row.

4. Below the list of tickets, select an option from the Bulk Action drop-down menu.

5. Click the Run button to apply the bulk action.

   A message summarizes the changes that are applied to the selected tickets.

6. Click OK.

   A message confirms that the changes were applied.

Resolve a ticket

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

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

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

- If the client clicks Yes, Help Desk Manager changes the Status to Closed.
- If the client clicks No, Help Desk Manager reopens the ticket and notifies you.
- If the client does not respond within the specified number of days, Help Desk Manager changes the Status to Closed.
Merge duplicate tickets
You can merge two or more tickets and their associated attachments and messages into one ticket using Merge Tickets. For example, if a client submitted three separate tickets for items related to the same problem, you can merge the tickets into one single ticket.

1. In the toolbar, click Tickets > Search Tickets.
2. Use the Basic Search and Advanced Search tabs to locate the tickets you want to merge.
3. In the Ticket Results screen, select the check boxes next to the tickets you want to merge.
4. Scroll down to the bottom of the screen and click Merge selected.
5. In the dialog box, click the drop-down menu and select the ticket that hosts all merged tickets.
6. Select Include Attachments to merge all attachments into the selected ticket.
7. Click Merge Tickets.
   Help Desk Manager combines all selected tickets and their associated notes and attachments to the parent ticket.

Reassign tickets to a new employee
When a technician leaves your department or organization, you can reassign the outgoing employee tickets to a new employee as required.

1. Log in to Help Desk Manager as an administrator
2. Deactivate the outgoing employee technician account.
   a. Click Setup > Techs > Techs.
   b. In the Tech Name column, click a tech name.
   c. In the Account Info tab, click ✏️ to enter edit mode.
   d. Scroll down to the Scheduling Setup section.
   e. In the Scheduling Setup box, deselect the Active Account checkbox.
      To retain all tickets associated to the outgoing employee, do not delete the account.
   f. Click Save.
3. Create a tech account for the new tech employee.
   Use this account when logging in to the Help Desk Manager Console
4. Reassign the tickets from the outgoing technician account to the new employee account.

Create parent/child service relationships
By default, all Help Desk Manager tickets are created as service request tickets. If necessary, a tech can change a service request to an incident or a problem ticket.
Service request tickets

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

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

For example, Jessie Burns is setting up a new server room in her department. She decides to purchase 12 1U rack mount servers and 12 1U rack mount storage systems. She creates a new service request, and indicates that she wants to purchase this computer equipment for his department. She submits separate service requests for the servers, storage systems, and computer racks, because they are all purchased from separate vendors.

To manage this project, she opens his initial request for computer equipment as the parent service request, clicks the Requests tab, and links the remaining service requests as children to the parent ticket.

The parent ticket displays each service as a linked child ticket. Linking the tickets will help Jessie manage his service requests for new equipment. When all service requests are resolved, Jessie can close the parent service request ticket.

When you close a parent service request ticket, all child service requests are not closed automatically.

Incident and problem tickets

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

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

Although linking incident tickets to a problem ticket is not required, it does make managing these tickets easier. For example, once linked, you can see the status of any incident and navigate to it within the properties of the problem ticket. In addition, closing a problem ticket automatically closes all incident tickets, which means that you do not need to close the incident tickets one at a time.
For example, Janet, Ellen, and Bruce submit a service request ticket stating that they cannot access their email in Microsoft Outlook. After researching the problem, you discover that your Microsoft Exchange server is down and needs to be restarted.

To troubleshoot and resolve all client tickets in one ticket, you can change the request type on one client ticket to Problem and the remaining tickets to Incident. Then link all the incident tickets to the problem ticket so they are shown as linked incidents.

When all incidents are resolved, you can close the parent ticket.

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

**Link child tickets to a parent ticket**

If you have multiple service requests that address the same issue, you can:

- Assign one of the tickets as the parent ticket (for incident and problem tickets)
- Assign a new ticket as the parent ticket (for service request tickets)

For example, if you have multiple incident tickets with a similar problem, change the ticket type in one ticket to Problem and link the remaining Incident tickets to the Problem ticket. If you have multiple Service Request tickets with related tasks, create a new Problem ticket that describes the task and link the related Service Request tickets to the Problem ticket.

**Link incident tickets to a problem ticket**

1. Open the service request ticket that you want to change to a problem ticket.
2. Click Problem, and click Save.
   The problem ticket is now the parent of each incident ticket.
3. Open the service request ticket that you want to change to an incident ticket.
4. Click Incident.
5. Within the incident ticket, click the Problems tab.
6. Search for the problem ticket that you want to make the parent of the incident.
7. In the Action column, click Link to make the selected ticket the parent of the current ticket.
8. Save your changes.
9. Repeat steps 3 - 8 for each incident you want to link to the parent.
10. To manage the tickets as a group, open the problem ticket and perform the following actions, as necessary.

A tech cannot email all Incident ticket recipients from a Problem ticket. However, if a Problem ticket is set to Closed, all Incidents tickets are Closed. This action generates a Ticket Closed email to all Incident ticket recipients.
Link service request tickets to one service request

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

1. Create a service request ticket that will be the parent ticket.
2. Open a service request ticket that you want to link to the parent ticket.
3. Within the service request ticket, click the Requests tab.
4. Search for the service request ticket that you want to make the parent ticket.
5. In the Action column, click Link to make the selected ticket the parent of the current ticket.
6. Save your changes.
7. Repeat steps 2 - 6 for each incident you want to link to the parent.
8. Open the parent ticket.
9. Monitor the status of each child ticket until they are resolved. When completed, close the parent ticket.

When you close the Problem ticket, the Child tickets are not closed automatically. You must close each individual ticket.

Remove linked parent tickets from child tickets

You can remove a linked parent in a child ticket by clicking the Trash icon in the Linked Parent window pane.

When you click the icon, a warning message appears at the top of your screen, stating you must save the ticket for the ticket relationship changes to take effect. Be sure to click Save to remove the linked parent from the ticket. Otherwise, the parent/child relationship remains and any notes you add in the child ticket will propagate to the linked parent.

View parent tickets in child tickets

To view the linked parent in a child ticket, open the child ticket and locate the Linked Parent box.

Link sub-child tickets to child tickets

You may have a service request that is the sub-child of an existing child ticket. For example, if a user cannot access email, a service technician may suggest re-installing Microsoft Outlook before diagnosing a connection issue with the Microsoft Exchange server.

In this situation, open the sub-child ticket (for example, reinstalling Microsoft Outlook) and add the child ticket as the parent ticket. The child ticket is now in the Linked Parent box. Next, open the child ticket and add the parent ticket as the linked parent. The parent ticket is now in the Linked Parent box.

If you add a sub-child ticket to an existing parent-linked child ticket, Help Desk Manager generates an error message stating that the child and sub-child tickets are both related to each other at the same level.
To correct this issue:

1. Open the child ticket and delete the link in the Linked Parent box.
2. Open the sub-child ticket.
3. In the top right section, click the Problems tab.
4. In the tab window under Request Search, select the appropriate field parameters to locate the targeted child ticket.
   A list of related tickets appear, based on your search parameters.
5. In the Search Result window, locate the targeted child ticket.
6. In the Action column, click Link.
   A dialog box opens at the top of the screen verifying your selection.
7. Click OK.
8. Click Save.
   The parent ticket is displayed in the Linked Parent box and the sub-child ticket is displayed in the Linked Children box.

Navigate between linked tickets

All linked parent and children tickets appear as hyperlinks within a linked ticket. To navigate between linked parent and child tickets, click the appropriate link in the Linked Parent or Linked Children boxes, respectively.

Add notes to parent and child tickets

When you create a service request, you can add notes and attachments that provide additional information to address the request. This process allows your help desk and service technicians to work together and solve a customer issue.

For example, if you hire a new employee and create a parent ticket to address linked child service requests (such as purchasing a new computer system and installing software applications), you can add notes and attachments in the parent ticket about specific hardware and software requirements that propagate to the first-level service requests and assigned service technicians. If a service technician experiences a problem with configuring the new employee's computer system, he can add notes and attachments to the service request that appear in the parent ticket (if desired) and associated sub-child tickets.

When you add notes and attachments to parent and child tickets, the following rules apply:

- Parent ticket notes propagate to first-level child tickets. Parent ticket notes do not appear in sub-child tickets.
- Child ticket notes propagate to the linked parent ticket (if desired) or first-level sub-child tickets.
- Propagated notes can be edited in the ticket where the technician created the note.

To create a parent or child ticket note:

1. Locate and open a parent, child, or sub-child ticket.
2. In the Notes tab, click New.
3. In the text editor, enter the text for your note.
4. Select the appropriate check box to process your note.
   - Visible to Client: make this note visible to clients of this ticket.
   - Solution: assign this note as the solution.
   - Date Override: set a custom time stamp to the note.
   - (Child and sub-child tickets only) Show in Linked Parent: display the note in the linked parent ticket.
5. Select any additional Work Time, Billing Rate, and Attachments options.
6. Click Save.
   - If you added a note to a parent ticket, the note is now in the parent ticket and the first-level child tickets.
   - If you added a note to a child ticket, the note is now in the child ticket, parent ticket (if you selected Show Linked Parent in step 4), and linked sub-child tickets.
   - To view the attachment, click the link in the note.
7. Click Save to save the ticket changes.

Automate parent/child ticket creation

You can automate the creation of related tickets by configuring tasks that initiate by action rules.

1. **Configure a task with elements.** Create a task with one or more related task elements with the Link to Parent check box selected in each task element.
2. **Configure an action rule that executes the task.** Create an action rule that runs these tasks and elements when a new ticket is created or modified.
3. **Create parent/child tickets.** Create child tickets automatically when a ticket matches the criteria in an action rule.

When a tech creates a new ticket or edits an existing ticket, a child ticket represented by the task element is created and linked to the new ticket.

**Configure a task with elements**

Configure a new task that automates your ticket creation process. For example, if you are working with your HR department to on-board an employee, you can create a task called New Employee and attach the following task elements to the task.

<table>
<thead>
<tr>
<th>TASK ELEMENTS</th>
<th>REQUEST TYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configure a new computer system</td>
<td>IT/General</td>
</tr>
<tr>
<td>Set up an employee phone and phone number</td>
<td>Phone/Voicemail</td>
</tr>
<tr>
<td>Configure a new employee workspace</td>
<td>Facilities</td>
</tr>
</tbody>
</table>

When you create each task element, ensure that the Link to Parent check box is selected. When completed, the task elements display in the Task Elements tab for the task.
If you select Link to Parent in the Task Elements tab window, your selected task elements are inherited from the parent ticket (for example, location, room, or tech) and Inherit displays in the Request Type and Request Detail columns. If the inherited elements include a location, room, or tech, Inherit displays in the Location, Room, and Tech columns, depending on the elements you choose to inherit from the parent ticket.

The Generate Next column displays when each task element is triggered. When you arrange your task elements in a specific order, you can control when the next element is triggered. The On Creation status is selected by default in the Task Elements tab window, which immediately triggers the next element after the previous element is triggered. If you select another status in the Generate Next Element row of the Task Elements tab window (such as Open, Pending, Closed, Canceled, or Resolved), your selected status displays in the Generate Next column for your task element.

The following illustration shows a list of task elements that inherit all tasks from the parent ticket. Each task triggers at a separate stage, depending on the options you select in the Task Elements tab window.

<table>
<thead>
<tr>
<th>Order</th>
<th>Request Type</th>
<th>Request Detail</th>
<th>Location</th>
<th>Room</th>
<th>Tech</th>
<th>Generate Next</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Inherit</td>
<td>Inherit: Inherit</td>
<td>Inherit</td>
<td>Inherit</td>
<td>Inherit</td>
<td>Status is Closed</td>
</tr>
<tr>
<td>2</td>
<td>Inherit</td>
<td>Inherit: Inherit</td>
<td>Inherit</td>
<td>Inherit</td>
<td>Inherit</td>
<td>On Creation</td>
</tr>
<tr>
<td>3</td>
<td>Inherit</td>
<td>Inherit: Inherit</td>
<td>Inherit</td>
<td>Inherit</td>
<td>Inherit</td>
<td>Status is Closed</td>
</tr>
<tr>
<td>4</td>
<td>Inherit</td>
<td>Inherit: Inherit</td>
<td>Inherit</td>
<td>Inherit</td>
<td>Inherit</td>
<td>On Creation</td>
</tr>
</tbody>
</table>

When you configure your task elements, the following rules apply:

- Each task you configure at Setup > Tickets > Tasks can include multiple task elements.
- The Link to Parent check box must be selected in a task element that triggers the execution of the next task element.
- A linked child ticket with a task element set to Generate Next Element: When Status Equals must match the status setting (such as Closed or Resolved) to trigger the next task element.
- The parent ticket cannot be changed until the linked task elements are completed.

**Link a child ticket to the parent**

When you click a request type link in the Request Detail column, the Task Elements tab window displays. Selecting the Link To Parent check box displays the Inherited column in the tab window. Using this column, you can select the field data you want to inherit from the parent ticket.

> **Help Desk Manager only creates one level of child tickets.**

The following screen provides an example of a child ticket displaying the Inherited column.

You can use the Inherited column to select the field data you want to inherit from the parent ticket. If you deselect Link to Parent, all previous selections are removed, and you can edit the child ticket fields as needed. If you select Link to Parent again, the Inherited check boxes are cleared, and you must select your options. The Subject and Request Detail fields are combined with the parent ticket and appended with a space between both field values.

After you select the Inherited column check boxes, perform the following steps:
1. In the Generate Next Element row, select when your task element is triggered.
2. Click the Element Order drop-down menu and select when this task is triggered in comparison with your existing task elements.
3. Click Save to save your changes.
4. Navigate to the Task Elements tab window and ensure all tasks are listed in the proper order and generate the next element when each task equals a specific status.

Some fields include specific logic used to inherit selected field data from the parent ticket. The following table describes the inherited field logic for specific fields in the child ticket.

<table>
<thead>
<tr>
<th>Field</th>
<th>Inherited Field Logic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject</td>
<td>When you select one of these fields, the field is appended to the value of the parent ticket.</td>
</tr>
<tr>
<td>Request Detail</td>
<td>If any of these fields are empty, the child ticket inherits the corresponding field value of the parent ticket.</td>
</tr>
<tr>
<td>Custom Text</td>
<td></td>
</tr>
<tr>
<td>Tech</td>
<td>When you select this field, the child ticket inherits the value of the parent ticket, and the Tech drop-down menu is disabled. When you clear this check box, the drop-down menu returns to its preselected value.</td>
</tr>
<tr>
<td>Request Type</td>
<td></td>
</tr>
<tr>
<td>Asset No.</td>
<td></td>
</tr>
<tr>
<td>All non-text custom fields</td>
<td></td>
</tr>
<tr>
<td>Attachments</td>
<td>When you select this field, the child ticket inherits all attachments from the parent ticket.</td>
</tr>
</tbody>
</table>

Configure an action rule

After you create your New Employee task and the associated task elements, create a new action rule that executes the task when a tech creates a ticket that matches the action rule criteria in a ticket.

For example, to execute the New Employee task, you can create a new rule with the following elements:

- Action Rule Info: Create a rule named On-board New Employee and select the Enabled check box.
- Criteria tab: Under Tickets matching ALL of these conditions, you can select Subject | Contains | New Hire.
- In the Actions tab drop-down menus, select Run Task | New Employee.

Only shared tasks display in the drop-down menu.

After you click Save, the new On-board New Employee rule displays in the Action Rules tab.

Create parent/child tickets

When a ticket matches the criteria in an action rule, the action rule executes the task you selected to run.
For example, the On-board New Employee action rule executes the New Employee task and associated elements when the Subject field in the ticket contains New Hire. When a tech creates and saves a ticket that matches the action rule criteria, Help Desk Manager executes the On-board New Employee action rule, triggering the New Employee task and associated task elements. When completed, all four tickets are created. See Action rules and Create tasks for more information.

Create email tickets

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

See Setting up email for information about setting up the incoming Help Desk Manager email address that receives and responds to email support requests.

See Update and resolve tickets for information about email ticket updates.

Update tickets using email

Clients and techs can update tickets by responding to Help Desk Manager email messages about the tickets.

The email content can vary depending on how you set up the client or tech email template. See Apply email templates for detailed information.

Ticket emails to clients

When a client submits a help request, Help Desk Manager sends the client a copy of the ticket. The client receives an email similar to the following example.
To populate the ticket, the client clicks Add Note or the ticket number under Ticket Info. This process creates a new email addressed to the help desk. When the client sends the email, it updates the ticket. Help Desk Manager responds by sending the client a new email showing the updated ticket.

To cancel the ticket, the client clicks Cancel Ticket.

When the tech resolves and closes the ticket, Help Desk Manager forwards the closed ticket to the client. The Client can edit the subject line in the email to perform the following tasks:

- **ConfirmSolution**
  This option confirms ticket resolution.
- **RejectSolution**
  This option reopens the ticket.

You can define what a client can do with their ticket by configuring the Client Options screen located at Setup > Clients > Options. See Define clients for more information about configuring client permissions.

**Ticket emails to techs**

When a ticket is assigned to a tech, Help Desk Manager sends the tech an email, as shown below.
The tech can update the ticket by pressing Control and clicking any of the active links in the email. These links include:

- **Ticket**
  
  In this example, the ticket number is 32340. The number specifies which ticket to update. Ticket numbers can be different, based on how you define them in Help Desk Manager.

- **Action**
  
  If you selected the Add Note option, the TechUpdate action appears.

- **Hidden**: [NO|YES|true|false|1|0] (case insensitive).
  
  If you selected the Add Note option (rather than the Add Hidden Note option), this characteristic is set to NO.

- **EmailClient**: [NO|YES|true|false|1|0] (case insensitive)
  
  The default for this example is YES.

In the example, the following characteristics are not defined:
- Reassigned: <EMAIL@ADDRESS.COM>
Enter the email address of the tech reassigned to the ticket.

- MinutesWorked: <INTEGER>
Enter how much time the Tech has spent working on the ticket. This option works only when the Tech is adding a note, so that the email body is not empty.

- BillingRate: <BILLING RATE NAME>
Add billing rate information here.

When you press Control and click an active link in the email, Help Desk Manager creates a new email specific to the clicked link. In the example above, the tech can add a note that the client can see, add a hidden note, or delete the ticket. The tech can also change the ticket's status.

For example, if the tech selects the Add Note option, Help Desk Manager creates an email, as shown below.

![Email Example](image)

Notice the email's subject. The subject reflects the ticket's defined options:

- Ticket
  In this example, the ticket number is 32340. The number specifies which ticket to update. Ticket numbers can be different, based on how they are defined in Help Desk Manager.

- Action: [Update | Cancel | ...?]
  If you selected the Add Note option, the TechUpdate action appears. When a tech selects this option, they can perform any of the actions described here, as well as delete the ticket. A tech can also add a note to the body of the ticket, a billing rate, time spent on the ticket, and more. When a client selects this option, they can cancel the ticket or add a note to the body of the ticket.

- Hidden: [NO | YES | true | false | 1 | 0]
  If you selected Add Note, rather than Add Hidden Note, this option is set to NO. This option is not case sensitive.

- EmailClient: [NO | YES | true | false | 1 | 0]
  The default for this example is YES. This option is not case sensitive.

In the example, the following characteristics are defined or selected to be defined:
Reassigned: <EMAIL@ADDRESS.COM>
Here, you can enter the email address of the tech reassigned to the ticket.
For example:
Reassigned: sean.green@thecompany.com.

MinutesWorked: <INTEGER>
Enter how much time the tech spent working on the ticket. This option works only when the tech is adding a note, so that the email body is not empty.
For example:
MinutesWorked: 45

BillingRate: <BILLING RATE NAME>
This option defines which billing rate to use and is active only when the tech is adding note and the email body is not empty. Use the whole billing rate name, including spaces and special characters. This option is not case sensitive.
For example:
BillingRate: Standard

When you create ticket emails, the following conventions apply:

- Ticket updates can be sent to the any address as long as it passes the Help Desk Manager incoming email-specific filter.
- Apply the following construct for editing and of the options described above:
  FieldName:Value
- Help Desk Manager ignores any spaces before Value.
- Subject edits must be in the order noted above.
- Help Desk Manager validates the user email sender address.
Automate ticket workflows

This section describes how you can set up priority types, action rules, and tasks to automate your ticket workflows.

- How ticket automation works
- Create an action rule to change ticket priority
- Configure a task to automate ticket creation
- Create an action rule to run a task

How ticket automation works

Automating ticket workflows is based on three principles: priority types, action rules, and tasks and task elements.

Priority types

Help Desk Manager prioritizes tickets and sends automated email alerts to techs based on how you configure your setup parameters. A ticket includes one of the following predefined priority types: Urgent, High, Medium, and Low.

Each priority type includes adjustable alert levels to automatically escalate an email. Help Desk Manager includes three alert levels, with level 3 as the highest severity. The Not Completed condition is considered more important than Not Updated, which is more important than Not Assigned. If alert levels include matching criteria, Help Desk Manager uses the highest severity level.

See Create a priority type for additional information.

Action rules

An action rule defines the action Help Desk Manager automatically performs on tickets based on your predefined conditions. For example, you can use an action rule to:

- Assign the ticket to a tech
- Change the priority level of the ticket
- Update the status of a ticket
- Run a task
- Modify a ticket
- Send an email

Tasks

Help Desk Manager uses tasks to create tickets. A task contains one or more task elements, and each task element provides settings for a new ticket. When the task runs, Help Desk Manager creates a ticket for each task element, either sequentially or all at once, depending on the configured task.
Tasks can run manually or automatically, at given intervals or based on specific criteria, depending on how you configure them. Tasks are especially useful for handling repetitive processes.

For example, if your HR department has a set of routine onboarding tasks to complete for a new employee, you can create a task called New Employee and define each task element required to help a new employee get started in their new position.

Related tasks can include:

- Completing tax and insurance forms
- Accessing network resources
- Configuring a new computer system
- Installing and configuring corporate and department-specific software

You can trigger a new task when required—for example, when you on-board a new employee. When you run the task, Help Desk Manager generates a ticket for each task element. These tickets can be assigned to techs, who ensure each task element is completed.

To automate your Help Desk Manager tickets:

1. Create a priority type.
2. Create an action rule to change the ticket priority.
3. Configure a task to automate ticket creation.
4. Create an action rule to run a task.

Create an action rule to change ticket priority

When you created a priority type, you created the Critical priority type.

The following example creates an action rule that selects all tickets submitted by the CEO, changes the ticket priority to Critical, and routes the ticket to a group.

1. In the toolbar, click Setup and select Processes > Action Rules.
2. Click New.
3. Select a priority and enter a rule name.

   [Only one action rule can be executed at a time. The action rule priority determines the trigger order of all action rules.]

4. Select the Cascade check box to trigger all defined actions for a ticket.
   Do not select Cascade to trigger only the highest priority action.
5. Select the rule triggering options to define when and how often Help Desk Manager applies the action rule.
6. Click Criteria.
7. Configure the conditions that tickets must match to trigger the action:
Every condition in the All section must be true. If any condition is false, the action is not triggered.
Help Desk Manager evaluates these conditions using the Boolean AND operator.

The Any section defines a group of conditions. At least one of these conditions must be true to trigger the action, but they do not all have to be true.
Help Desk Manager evaluates these conditions using the Boolean OR operator.

If both sections include conditions, all conditions in the All section and at least one condition in the Any section must be true.
Help Desk Manager evaluates the two groups with a Boolean AND operator between the groups:

\((all\_1 \text{ AND } all\_2) \text{ AND } (any\_1 \text{ OR } any\_2)\)

If no conditions are defined in the All section, at least one condition in the Any section must be true.

8. Click Actions.
9. Specify the action to take when the conditions are met.
10. Click Save.

Configure a task to automate ticket creation

You can use Help Desk Manager tasks to automate ticket workflows.

In the following example, a new hire setup task is created. This task contains the following task elements:

- Cubicle setup
- Access to the network
- New hire paperwork
- Email setup

When the action rule runs the task, the task elements become tickets configured with a request type and associated tech.

1. In the toolbar, click Setup.
2. Select Tickets > Tasks.
3. Click New.
4. Enter a task name.
5. Click Shared.

Sharing a task makes it available to other techs and for use in action rules.

A task **must** be shared before you can configure an action rule to run it.
6. Click Save.

7. Click Task Elements, and click New.

8. Configure the child ticket to inherit field values from the parent ticket.
   a. Click Link to Parent.
   b. Select the Inherit Value check box for one or more fields.
9. Select a Request Type, enter a Subject and Request Detail, and click Save.

<table>
<thead>
<tr>
<th>Task Info</th>
<th>Task Elements</th>
<th>History</th>
</tr>
</thead>
<tbody>
<tr>
<td>Element Order</td>
<td>1 ▼</td>
<td>Inherit Value (all / none)</td>
</tr>
<tr>
<td>Link to Parent</td>
<td>□</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>▼</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td>▼</td>
<td></td>
</tr>
<tr>
<td>Request Type</td>
<td>Facilities Request ▼ Cubicle Setup ▼</td>
<td></td>
</tr>
<tr>
<td>Subject</td>
<td>New hire cubicle setup</td>
<td></td>
</tr>
<tr>
<td>Request Detail</td>
<td>Please prepare a cubicle for the new hire.</td>
<td></td>
</tr>
<tr>
<td>Tech</td>
<td>Admin, Joe ▼</td>
<td></td>
</tr>
<tr>
<td>Priority</td>
<td>Medium ▼</td>
<td></td>
</tr>
<tr>
<td>Attachments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asset No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Generate Next Element</td>
<td>□ On Creation □ When Status Equals</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Save</td>
</tr>
</tbody>
</table>

10. Add your remaining task elements, and click Done.

<table>
<thead>
<tr>
<th>Task Info</th>
<th>Task Elements</th>
<th>History</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order</td>
<td>Request Type</td>
<td>Request Detail</td>
</tr>
<tr>
<td>1</td>
<td>Facilities Request • Cubicle Setup</td>
<td>New hire cubicle setup: Please prepare a cubicle for the new hire.</td>
</tr>
<tr>
<td>2</td>
<td>Network • New Hire Network Access</td>
<td>New hire needs access to the network: Please provide access to the network.</td>
</tr>
<tr>
<td>3</td>
<td>Email / Outlook • New Hire Setup</td>
<td>New hire email account: Please create an email account for the new hire.</td>
</tr>
<tr>
<td>4</td>
<td>HR Request • New Hire Paperwork</td>
<td>New hire paperwork to be completed: Please have the new hire complete all HR paperwork.</td>
</tr>
</tbody>
</table>

Next task: Create an action rule to run a task

**Create an action rule to run a task**

When you configure an action rule to run a task, the system creates a ticket for each task element. In the following action rule, the New Hire task creates four tickets when a client submits a ticket with a new hire request type.
Before you begin

- Create a task and task elements

Create an action rule to run a task

1. In the toolbar, click Setup.
2. Select Processes > Action Rule.
3. Enter a rule name.
4. In the Rule Triggering field, select the options to define when and how often Help Desk Manager applies the action rule.

5. Click Criteria.
6. Create a condition that includes the new hire request type.

7. Click Actions.
8. Configure the action to run the new hire task.

![Action Rule Info](image)

9. Click Save.

10. To test the action rule, submit a ticket with the new hire request type.

   The system creates the parent ticket first, followed by a child ticket for each task element. In this example, Ticket #27 is the parent ticket.

   ![Ticket Examples](image)

11. To view and manage child tickets, open the parent ticket. The parent ticket lists all child tickets, as shown in the example below.

   In the parent ticket, you can:
   - Navigate to the child tickets.
   - Add a note to the parent that propagates to the child tickets.

   ![Linked Child Tickets](image)

   Closing the parent ticket does not automatically close the child tickets.
Manage devices

Help Desk Manager provides the following options to work with Devices:

- Add devices
- Edit device properties
- Search devices
- Add purchase orders
- Reserve devices
- Remove devices

Devices can be associated with clients so techs can easily identify the items for which support is requested.

Each Device is associated with a Model. Models are grouped by manufacturer.

When entering Purchase Orders (see Devices > Purchase Orders), each line item identifies a device model and vendor.

Define devices

Devices are the Client-owned software and hardware that Techs work with. Help Desk Manager tracks Devices by properties such as:

- Customer
- Type
- Status
- Owner
- Serial Number
- Warranty Dates
- Lease Types
- Relationship to Other Devices
- Ticket History
- Purchase Orders

Manually add devices

1. Click Assets and select Search Assets.
2. In the Search Assets lower window, click New Asset.
3. Complete the fields as required.
   - Click the tooltips for additional help.
4. Click Asset Details and complete the fields as required.
   Click the tooltips for additional help.
5. Click Save.

**Edit Device properties**

1. In the toolbar, click Assets and select Search Assets.
2. Click the Basic Search tab.
3. Select and/or complete the appropriate fields to locate the asset.
   For additional search options, click Advanced Search and complete the fields in the window.
4. Click Search.
   Your search results display in the bottom window.
5. In the No. field, click the asset number icon.
   The Device tab windows display.
   Each tab window provides unique information.
   - Device Basics provides general asset information you can edit, including the asset type, model location, and status.
   - Device Details provides detailed Device information you can edit, including serial number, version, and IP address.
   - Device History provides dates and actions when an asset was removed, modified, or changed status, as well as the associated tech. You cannot edit this information.
   - Ticket History provides the ticket number, date, status, and problem report associated with the Device, as well as the associated tech in each instance. This information cannot be edited.
6. In the window, click the Edit icon.
7. Make any changes as required.
8. Click the Asset Details tab.
9. Make any changes as required.
10. Click Save.

**Create parent and child associations**

In the Device Basics tab, you can link Devices as a parent or as a child of another Device. When you assign parent/child associations to your assets, the following conventions apply:

- A parent Device can have any number of child Devices.
- A child Device cannot be a parent to another Device.
- Removing the parent status orphans all the child Devices for that parent.
- Child Devices can be removed individually from a parent.
- A child Device can have any number of parent Devices.
- Child Devices inherit priorities from the parent objects including Customer, status, and other properties.
- Parent/child status is set by adding child Devices to a parent Device. You cannot add a parent to a child.

**Add Devices as children of a parent Device**

1. In the toolbar, click Devices and select Search Assets.
2. Click the Basic Search tab.
3. Select or complete the appropriate field to locate the asset.
   For additional search options, click Advanced Search and complete the fields in the window.
4. Click Search.
5. In the No. field, click an asset number.
   The Device Basics tab windows appears, displaying information about your selected Device.
   The Child Assets box displays at the bottom of the window.
6. Click the Edit icon at the top of the window.
7. In the Child Devices tabbed box, click Edit.
   The Device Lookup box displays.
8. Select or enter the search criteria to locate the appropriate Device, and then click Search.
   The Search Results box appears with a list of assets.
9. Click Link to select one of the listed Devices as a child Device.
10. In the Device Lookup box, click Done.
    The Device is added as a child Device.
11. Click Save.
    The asset is saved as a child asset.

**Remove Devices as children of a parent Device**

1. In the toolbar, click Devices and select Search Devices.
2. Click the Basic Search tab.
3. Select or complete the appropriate field to locate the asset.
   For additional search options, click Advanced Search and complete the fields in the window.
4. Click Search.
   Your search results appear in the bottom window.
5. In the No. field, click the appropriate asset number icon.
   The Device Basics tab windows appears, displaying information about your selected Device.
   The Child Assets box appears at the bottom of the window.
6. Click the Edit icon at the top of the window.
7. Click the trash can next to the child Device you want to remove.
8. Click Save.
Search Devices

You can search for Devices in the Basic or Advanced tabs. Basic searching provides a simplified subset of the search criteria available in the advanced search mode.

To sort your search results, click the appropriate column header. To download the search results in PDF, TSV, or Excel format, click the appropriate icon.

Refine your search results

Your search results can include a large amount of Device data. To reduce your search results, use the Column Set drop-down menu and select a column format. Click [+ ] to add a new column set, or edit the selected column set by clicking the pencil icon.

Save a query

1. Define your search criteria using the same method explained in Search tickets.
2. Click the Advanced Search tab.
3. In the Save Query as field, enter an appropriate name.
4. Select the Shared check box to allow other techs to use this search.
   Depending on your access level, you may not have access to the Shared box.
5. Click Save.

Run a query

Select the query name from the Query menu at the top of the search results display. When selected, the query runs automatically.

Export a report

After you save a query, you can export all queried asset data to a Microsoft Excel spreadsheet.

- Your connections may timeout if you export large quantities of assets (for example, 30,000 assets).
  To minimize timeouts, export the assets in batches.

1. In the toolbar, click Assets.
2. In the Assets screen perform a basic or advanced search for your targeted assets.
3. Click the checkbox in the top left column to select all Devices.
4. In the toolbar, click Excel.
   The file is saved to our Downloads directory.
5. In the pop-up window, click the Excel spreadsheet to view the report.

Add purchase orders

The Help Desk Manager purchase orders feature tracks your Device purchases and leases.

- This feature is not designed to replace your company's current accounting or ordering systems. Help Desk Manager does not create purchase orders, but rather stores information about purchase orders.

Add a vendor

Before you add a new PO, add one or more vendors into the database.

1. In the toolbar, click Setup and select Devices > Vendors.
2. Click New.
3. In the Vendors information screen, complete the fields as required.
4. Click Save.

Add a purchase order

1. In the toolbar, click Devices and select Purchase Orders.
2. In the window, click New or New Purchase Order.
3. In the PO Number field, enter a unique number.
4. In the Order Date field, add the date when the purchase order was entered.
5. In the Invoice Date field, enter the date when the vendor shipped the product. This date is used to calculate the warranty and lease expiration date.
6. Click the Vendor drop-down men and select the vendor.
7. In the Order Type row, select Lease or Purchase.
8. In the Originator row, enter the last name of the client who created the PO request.
9. In the Deliver To row, enter the last name of the client who receives the purchased items.
10. Click Attachments and add any supporting documentation (if required).
11. In the Notes box, enter any additional information about the purchase order (if required).
12. Click Save.

Add purchase order line items

After you save the purchase order, you can add line items to the purchase order using the line item editor. These line items can include individual parts and their associated costs.

When you add purchase order line items, use the following conventions:
Associate specific Devices by providing a valid Device number. If you link a line item to a device number that does not exist or is already linked to another PO, Help Desk Manager generates an error message.

All line items must define a model and may contain part number and price information. Devices can also be associated to a PO from within the Device detail view.

Include a “free” line item defined in the PO to link the Device. For example, if you add a new Apple Macintosh Device, you could associate it with the free line item because the computer system line item is free (not linked) to any Device number.

1. Select a purchase order.
   a. Click Devices and select Purchase Orders.
   b. In the Purchase Order Search window, complete the files with your search information and click Search.
   c. In the PO Number column, click the appropriate purchase order number.

2. Click the Pencil to edit the PO.

3. In the Line Item box, complete the appropriate fields as required.
   Your line items must define a model and may contain part number and price information. Devices can also be associated to a PO from within the Device detail view.

4. Click New Line Item to add additional line items.

5. When completed, click Save.

Import purchase orders

See Import data for details about importing purchase orders.

Reserve devices

To ensure that your Devices are available when needed, use the Device reservation feature.

1. In the toolbar, click Devices and select Search Devices.
2. Search and select the Device you want to reserve.
3. Edit the Device.
4. Select the Reservable check box.
5. Click Save.

Set up Device reservations as a tech

1. In the toolbar, click Devices and select Reservations.
2. Click New or New Reservation.
3. In the Client Lookup box, select the client who will check out the Device.
4. In the Reservation Details tab, set the Scheduled Out and Scheduled In dates and times.
5. In the Asset Lookup tab, locate the Device you want to reserve.
6. Click the Device you want to reserve.
7. Click Save.

**Set up Device reservations as a client**

An administrator must provide clients permission to reserve an Device before clients can use the reserve Device feature.

1. In the toolbar, click Setup and select Devices > Options.
2. In the Asset Options screen, select Clients Can Search Devices.
3. (Optional) If you selected Clients Can Search Devices, select Limit to Assigned and Reservable (if applicable).
4. Click Save.

**Reserve an Device as a client**

1. In the client interface, click Devices.
2. Click Search.
3. Locate your Device.
4. Select the Reserve check box.
5. Click Reserve Checked.
   A calendar window appears, allowing you to select a reservation date or range of dates.
   To select a reservation date range, click the first day of the reservation, drag the cursor to the last day of the reservation, and then click Save.
   To remove a reservation, click the trash can on the reservations page.

**Check Devices in and out**

Only Techs can check reserved Devices in or out.

1. In the toolbar, click Assets and select Reservations.
2. In the Search screen, complete the fields as required.
3. Click Search to locate your reserved Devices.
4. In the Reservation Details screen, click Check In to check in an Device.
   Click Check Out to check out an Device.

**Remove Devices**

In Help Desk Manager, the default aging interval for all Devices is 90 days. If a node is not provided data within the last 90 days, its life cycle status changes from Active(0) to DECOMISSIONED(2).

To update the default aging interval:

1. Locate and open the appropriate configuration file in a text editor.
   For Microsoft Windows systems, open the wrapper_template.conf file located at:
For Linux systems, open the whd.conf file located at:

```
<HelpDeskManager>/conf/whd.conf
```

2. In the file, update the value in the following `JAVA_OPTS` parameter:

```
-Dasset.agingInterval=30d
```

   In this example, all Help Desk Manager Devices are decommissioned if not rediscovered within 30 days.

3. Save and close the file.

**Report on Devices**

You can build real-time reports on multiple Devices based on the features you choose. For more precise information, filter those assets by factors such as:

- Customer
- Manufacturer
- Billing rate
- Warranty expiration date
- Purchase date.
Import and export data

The data import options let you import data in bulk, rather than manually adding individual items. You can import data using predefined templates. Help Desk Manager provides templates in three formats: Excel spreadsheets, tab-separated variable (TSV) files, and comma-separated variable (CSV) files.

Use template data imports for the following Help Desk Manager selections:

- Customers
- Clients
- Devices
- Purchase Orders
- Tickets
- FAQs
- Parts
- Inventory

See Use templates to import data for details on how to set up and apply Help Desk Manager templates to import your data.

Integrate Help Desk Manager with N-central

To import device data, you must integrate HDM with N-central.

Integration requires:

- Accessing the HDM API key and adding it to N-central so the two applications can share data
- Configuring N-central so that it can be integrated with Help Desk Manager

To obtain the HDM API key:

1. Log in to Help Desk Manager.
2. In the toolbar, click Setup.
3. Select the Techs tab.
4. Click My Account.
5. Click the Edit icon.
6. Next to the API Key, click Generate.
7. Copy, paste, and save the API Key in a text editor or other document file so it can be used later to configure N-central.

Do not modify this value.

8. Click Save.
9. Log out of Help Desk Manager.
Use templates to import data

You can import data from files in tab-separate-values (TSV), comma-separated-values (CSV), or Excel formats.

Help Desk Manager uses templates to ensure data files are formatted correctly. The first data row in the file must match the appropriate template, which you can download from the Setup > Data Import menu.

SolarWinds MSP recommends downloading the appropriate template, importing the template into a Microsoft Excel spreadsheet, and then entering your data into the spreadsheet. When you are finished, you can convert the Excel file to a TSV or CSV file, and then import the file into Help Desk Manager.

For all but the ticket import format, the import file format matches the TSV downloads formats available for each entity.

**TSV templates**

A typical TSV template contains column headings. The following example shows a client TSV template.

When you click Download Template in the Import Clients screen and download the template file, you can re-import the file into the Clients importer template.

Because ticket TSV downloads are typically used for reporting instead of bulk changes, the columns in the ticket TSV download match the columns in the selected column set rather than the columns in the ticket import template.

---

If you are using an Excel spreadsheet to format the data and your data file contains Unicode characters, deselect the MS Excel Unicode (UTF-16) file encoding option—both in Excel and in Help Desk Manager.
Data import types

You can import several types of data into Help Desk Manager. These include:

- Companies
- Clients
- Assets
- Purchase orders
- Tickets
- FAQs
- Inventory

The following table provides an example of the import types and corresponding fields required to import a list of locations into Help Desk Manager:

<table>
<thead>
<tr>
<th>TYPE OF IMPORT</th>
<th>REQUIRED FIELDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer</td>
<td>Customer Name</td>
</tr>
<tr>
<td>Companies</td>
<td>Company Name, Manager Tech Username</td>
</tr>
<tr>
<td>Clients</td>
<td>Last Name, User Name, E-Mail</td>
</tr>
<tr>
<td>Devices</td>
<td>Device Type, Manufacturer, Model</td>
</tr>
<tr>
<td>Purchase Orders</td>
<td>PO Number, Vendor</td>
</tr>
<tr>
<td>Tickets</td>
<td>Open Date, Request Type</td>
</tr>
<tr>
<td>FAQs</td>
<td>Category, Question, Answer</td>
</tr>
<tr>
<td>Parts</td>
<td>Part Number, Manufacturer, Our Cost, Customer Cost</td>
</tr>
<tr>
<td>Inventory</td>
<td>Part Number, Customer, Count</td>
</tr>
</tbody>
</table>

Before you begin

Define the import types in Help Desk Manager before you download and populate the template. For example, if you want to import your customer information, define all customer fields in Help Desk Manager so your template contains all required data fields for your imported data.

Download and populate the template

When you populate your template, use the following conventions:

- To prevent failed imports, do not change the data order or delete columns in any import.
- If the tickets implement request sub-types, enter the type and sub-type in the Type column and
separate the type and sub-type with a semicolon.

- Do not use commas or currency symbols in your template.

The following example describes how to download a template and add your client data using an Excel spreadsheet.

1. In the toolbar, click Setup > Companies & Locations > Data Import.
2. Under Data Import, click a category.
   For example, Import Clients.

3. Complete the Import menu options. For this example, the File Type is Microsoft Excel.

   Click the tooltips for details about each option.

4. Click Download Template and save the file to a local or network directory.
5. Double-click the template.
   The template fields are parsed to column headers in the Excel spreadsheet.
   
   If any customer headers are missing, go back to Help Desk Manager and enter the missing fields. When you are finished, re-import the template.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>First Name</td>
<td>*Last Name</td>
<td>*User Name</td>
<td>*E-Mail</td>
<td>Secondary E-Mail</td>
<td>Phone</td>
<td>Phone 2</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

6. In row 2, enter the that applies to each column header for the first customer.
   
   All fields highlighted with an asterisk (*) are required fields.

   If you are completing the fields for a Ticket template, you can customize the content for the Request Detail and Notes fields. See Customize tickets, notes, instructions, and emails with BBCode for details.

7. In the remaining rows, enter the information for each remaining customer.
8. Save the spreadsheet.

**Import the template file into Help Desk Manager**

The following procedure describes how to import your spreadsheet data into Help Desk Manager as an Excel template.

1. Return to the Import Clients page.
2. In the Import Data file field, click Choose File.
3. Locate and select your Excel spreadsheet.
4. Click Import.
   The customer data is imported into Help Desk Manager.

**Add a CA to the embedded Java CA cert keystore**

Help Desk Manager does not accept certificates signed by a Certificate Authority (CA) that is not trusted by its Java Virtual Machine (JVM). To import the certificate into the trust store, export the certificate to the CRT file and import the CA. Run Porteclé as an administrator to import the CA.

**Import certificates on Windows**

1. Open Porteclé at `<HelpDeskManager>/portecle.bat`.
2. Navigate to File > Open Keystore File.
3. Open the cacerts keystore at `<HelpDeskManager>/bin/jre/lib/security/cacerts`.
4. When prompted, enter the default password:
   changeit
5. Click Tools > Import Trusted Certificates and locate the .crt file.
6. Choose the following file and alias/name:
   FileSaveKeystore
7. Restart Help Desk Manager.

**Import an existing certificate**

By default, Help Desk Manager creates a self-signed certificate. Since the certificate is not signed, it displays as not trusted. You can obtain a signed certificate from a Certificate Authority (CA), such as Comodo, GoDaddy, and others. To obtain a certificate, you can create a Certificate Request or use an existing certificate.

To use an existing certificate with Help Desk Manager, import your private key and your certificate chain.

**Import a wildcard certificate**

Large organizations may use a signed certificate (such as a wildcard certificate) throughout their domain. This certificate may be stored in a central location (such the Central Certificate Store (CCS) included with Windows Server 2012 and higher) and distributed on demand.

You can import a self-signed wildcard certificate in personal information exchange format (PFX) to your Help Desk Manager keystore. The import should include they and certificate in a single file.

If you cannot import the PFX file using the Help Desk Manager Administrator Console, import the file using Portecle, which is included with your Help Desk Manager program files. You can download the user documentation from the Portecle website at portecle.sourceforge.net.

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1. Log in to the Help Desk Manager host server as an administrator.
2. Navigate to:
   C:\Program Files\N-able Technologies\Help Desk Manager
3. Double-click Portecle.bat.
4. Enter your keystore password. This password is located in the whd.conf file.
   The default password is changeit.
5. Right-click tomcat and select Delete.
6. Click Tools > Import key pair.
   Do not import the certificate using Tools > Import Trusted Certificate, as this option will not include the private key.
7. Select the new self-signed or wildcard PFX certificate.
8. Enter the password.
   This password should be identical to the current keystore password.
9. Save the keystore.
10. Restart Help Desk Manager.

Import a self-signed certificate

Self-signed certificates do not contain CA certificates. As a result, use your group policy object (GPO) to push the PDX file to a trusted certificate store.

About PKCS#12 files

The PKCS#12 standard specifies a keystore format used for transferring private keys and certificates. PKCS#12 files typically use the p12 or PFX extension. If you have your private key and certificate bundled in this format, you can import it directly into Porteclé.

If a PKCS#12 (p12 or PFX) file is not available, use the OpenSSL pkcs12 command to generate the file from a private key and a certificate. If your certificate is on a Windows server, export a PKCS#12 file from the Microsoft Management Console.

Create a PKCS#12 keystore from a private key and certificate

OpenSSL is an open source software library that provides the pkcs12 command for generating PKCS#12 files from a private key and a certificate.

The private key and certificate must be in Privacy Enhanced Mail (PEM) format (for example, base64-encoded with -----BEGIN CERTIFICATE----- and -----END CERTIFICATE----- headers and footers).

Use these OpenSSL commands to create a PKCS#12 file from your private key and certificate:

```
openssl pkcs12 -export \
    -in <signed_cert_filename> \ 
    -inkey <private_key_filename> \ 
    -name 'tomcat' \ 
    -out keystore.p12
```

If you have a chain of certificates, combine the certificates into a single file and use it for the input file, as shown below. The order of certificates must be from server certificate to the CA root certificate.

See RFC 2246 section 7.4.2 for more information about this order.
When prompted, provide a password for the new keystore. This password is required for importing the keystore into the Help Desk Manager Java keystore.

Export a PKCS#12 keystore from the Microsoft Management Console

To use an existing certificate located on a server running Microsoft Windows:

1. Click Start > Run.
2. In the Run box, execute:
   
   \n   \n   The Microsoft Management Console displays.
3. Select File > Add/Remove Snap-In.
5. Expand Console Root > Certificates > Personal.
   
   Your certificate is displayed.
6. Right-click your certificate and select More Actions > Export List.
7. Follow the Certificate Export Wizard prompts to export a Personal Information Exchange – PKCS #12 (.pfx) file.

   Note the location where you saved the PFX file.
8. Select the option to Include all certificates in the certification path.
9. Import the PKCS#12 file Into the keystore.

Import a PKCS#12 file into the keystore

When you import your file, ensure that:

- **Your certificate chain is intact in the Help Desk Manager keystore.** Double-click the certificate to inspect the certificate chain and view the certificate details. Use the left and right arrows at the top of the details panel to navigate through each certificate in the chain.

  If you do not see the full certificate chain, import the CA certificates first at Tools > Import Trusted Certificate and import your keypair again. Porteclé does not establish trust when a certificate is imported before the certificate that was used to sign it.
- **You import the certificate chain in the correct order.** Your root certificate is imported first, then the next certificate in the chain, and so on until you get to your own certificate.

- **Your certificate is aliased as tomcat.** The password for your certificate and the keystore must be identical and match the KEystore_PASSWORD setting in the `<HelpDeskManager>/conf/whd.conf` file (change it by default).

If your keystore contains a default, unsigned Tomcat certificate, delete this certificate before you import your PKCS#12 file.

To import the contents of a PKCS#12 file into the Help Desk Manager keystore, you can:

- Convert the PKCS#12 keystore to a Java keystore
- Import the keypair containing your certificate

**Convert the PKCS#12 keystore to a Java keystore**

1. Click File > Open Keystore file.
2. Click Tools > Change Keystore Type > JKS and convert the keystore to a Java keystore.
3. Save the file in `<HelpDeskManager>/conf/keystore.jks` to overwrite the existing keystore file.

**Import the keypair that contains your certificate**

1. Open the Help Desk Manager keystore file.
2. Click Tools > Import Keypair.
3. Import the keypair containing your certificate into Porteclé.
   
   When prompted, select which keypair in your PKCS#12 keystore to import.
Create and edit reports

Reports can show statistics and aggregated data (such as totals or averages). They can also represent data graphically (as bar charts and pie charts) to help you compare groups of tickets or assets.

Reports display information about tickets, assets, and billing. They are useful for showing the total or average value of one type of item in relation to a second type of item. Examples include:

- How many tickets did each tech close?
- How many tickets were opened against each asset?
- How many assets are checked out in each location?
- What is the average work time per ticket request type?
- How many tickets were opened against each request type?

Reports can be displayed in the web interface or generated in PDF format. You can also create schedules to automatically run reports and email them to groups of recipients.

From any report, you can click the ticket or asset total to display detailed information about the items included in that total.

The Reports screen includes a list of predefined reports that focus on device, billing, and ticket information. You can also create composite reports that link together a mixture of reports. Each report can include charts or tables that display the number of items in possible categories.

Click Reports in the toolbar to access the Reports screen.

Sample reports

Using sample reports included with Help Desk Manager, you can create asset and ticket reports to help you monitor technician performance, customer support needs, and incidence frequency. Using additional features incorporated into Reports, you can categorize reports into report groups, generate survey results, and schedule automated reports for distribution.

Listed below are the types of reports you can create in Help Desk Manager. After you create a report, you can view, print, or download the report.

<table>
<thead>
<tr>
<th>REPORT TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Devicereport</td>
<td>Reports details about multiple types of Devices in your organization, such as:</td>
</tr>
<tr>
<td></td>
<td>- Number and types of Devices in your corporate enterprise</td>
</tr>
<tr>
<td></td>
<td>- Devices approaching end of warranty or purchased within a specific data range</td>
</tr>
<tr>
<td></td>
<td>- Device attributes such as Class, Customer, and Warranty Type</td>
</tr>
<tr>
<td></td>
<td>- Number of tickets generated by Device issues</td>
</tr>
<tr>
<td></td>
<td>- Overdue, reserved, and reservable Devices</td>
</tr>
</tbody>
</table>
## Report Types

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ticket report</td>
<td>Reports on data collected in customer tickets. You can create a ticket report that includes a bar chart, pie chart, or table-only reports.</td>
</tr>
<tr>
<td>Billing report</td>
<td>Reports the total work time, parts cost, and labor cost accrued for a set of tickets.</td>
</tr>
<tr>
<td>Custom report</td>
<td>Reports on specific items you select in the Help Desk Manager Administrator Console.</td>
</tr>
</tbody>
</table>

## Create report groups

Create report groups helps you organize your reports and control access to report data.

Report groups control access to created reports sorted by Tech and Customer Group. This ensures that each Tech is only presented with reports within their scope of work.

1. In the toolbar, click Reports and select Report Groups.
2. In the Report Groups screen, click New.
3. In the Report Group Name field, enter the appropriate group name.
4. In the Tech Groups and Location Groups rows, select the Tech Groups and Customer Groups that can access the reports.
5. Click the Included Reports tab.
6. Select the applicable Reports.
7. Click the Group Options tab.
8. Click Save.

## Create Device reports

Create Device reports using Reports in Help Desk Manager, you can build real-time reports on multiple Devices based on the features you choose. Device reporting can help you better manage organizational Devices by providing the statistics you need to make informed decisions.

Use Device Reporting to gather information on various data in your organization, such as:

- Number and types of Devices in your corporate enterprise
- Devices approaching end of warranty or purchased within a specific data range
- Device attributes such as Class, Customer, and Warranty Type
- Number of tickets generated by Device issues
- Overdue, reserved, and reservable Devices
Create an Device report

1. In the toolbar, click Reports.
2. In the Reports screen, click New.
3. In the Report Name field, enter a name that identifies the report. This name will appear in the report title.
4. (Optional) Click the Report Group drop-down menu and select a report group. Applying a Report Group can make reports easier to find when you have many reports.

   ![Image](image.png)

   If no Report Groups are available, the default report group is Sample Reports. To create a new report group, save the information currently in the Report Basics tab and see Create report groups to learn how to build report groups.

To apply the newly-created Report Group to a report, select the report from the list of Help Desk Manager reports, click Edit, and select the Report Group.

5. Click the Report Type drop-down menu and select Device Report.
6. Click Save.
7. Select the type of report to create:
   - Bar chart
   - Pie chart
   - Table-only

Create a bar chart Device report

1. In the Chart Type row, ensure that Bar Chart is selected.
2. Click the Bar Category drop-down menu and select an option.
   For example, if you select Model, the bar chart will include all assets by model.
3. Click the Bar Stack Category drop-down menu and select Device Type to specify the data stacked on each bar.
4. (Optional) To draw the bar stack categories with percentage values, select the Draw as percentages check box.
5. Complete the remaining fields as required.
   Click the tooltips for more information.
6. (Optional) Add a report filter.
   a. Select the Report Filters tab.
   b. Click New.
   c. Click the Filter Attribute drop-down window and select an option.
      For example, if you select Model, the report filters all assets by model.
7. In the Report Details window, click Save.
8. Click Run Report to generate the report.
Create a pie chart Device report

1. In the Chart Type row, select Pie Chart.
2. Click the Pie Slice Category drop-down menu and select an option to indicate which data the pie slices represent.
   For example, if you select Model, the pie slices in the report will represent Devices by model.
3. For each category, select how many Device types and Customers to show in the chart. Pie charts default to show the top 10 items, unless you specify another number.
   For the best illustration, keep the number of items shown in the pie chart to 15 items or less. If you need to add more than 15 items to a pie chart, consider using a bar chart instead.
4. To include a table in the report, select the number of items to include in the table.
   The default amount of items shown in tables is 100.
5. Complete the remaining fields as required.
   Click the tooltips for more information.
6. (Optional) Add a report filter.
   Report filters restrict the tickets included in the report by specifying the attribute values that should be excluded. For example, a Status Type filter could restrict the report to Open or Pending status types. Click the Help icon in the Report Filters tab for more information.
7. a. Select the Report Filters tab.
   b. Click New.
   c. Click the Filter Attribute drop-down window and select an option.
      If your filter attribute is identical to the report category, only the values allowed by the filter appear in the report.
      For example, if you select Model, the report filters all assets by model.
8. In the Report Details window, click Save.
9. Click Run Report to generate the report.

Create a table only Device report

1. In the Chart Type row, select Table Only.
2. Click the Row Category drop-down menu and select Model to indicate which data appear in the table rows.
3. Click the Column Category drop-down menu and select an option.
   For example, if you select Device Type, the table columns in the report will represent Devices by model.
4. Complete the remaining fields as required.
   Click the tooltips for more information.
5. (Optional) Add a report filter.
   a. Select the Report Filters tab.
   b. Click New.
   c. Click the Filter Attribute drop-down window and select an option.
      For example, if you select Model, the report filters all assets by model.
      If your filter attribute is identical to the report category, only the values allowed by the filter
      appear in the report.
   d. Click the Report Details tab.

6. In the Report Details window, click Save.
   Your changes are saved.

7. Click Run Report.

Create ticket reports

A ticket report **does not reflect the correct work time** because the data is based on ticket totals, and
not the tech. To generate a report with the correct work time, train your techs to track their ticket
work time. After Help Desk Manager collects enough work time data, you can generate a billing
report to track this information.

1. In the toolbar, click Reports.
2. Click New.
3. In the Report Name field, enter a name used to identify the report. This name will appear in the
   report title.
4. (Optional) Click the Report Group drop-down menu and select a report group. Applying a Report
   Group can make reports easier to find when you have many reports.
5. Click the Report Type drop-down menu and select Ticket Report.
   The Report Details and Report Filters tabs appear. These tabs define what the report looks like and
   the data it contains.
6. Click Save.
   The Report Details tab window displays.
7. Select the type of report to create:
   - Bar Chart
   - Pie Chart
   - Table Only

Create a bar chart ticket report

1. In the Chart Type row, select Bar chart.
2. Click the Bar Category drop-down menu and select the appropriate category for your report.
3. Click the Bar Stack Category drop-down menu and select an option to specify the data stacked on
   each bar.
4. Complete the remaining fields as required.
   Click the tooltips for more information.
5. Click Save.
6. (Optional) Click the Report Filters tab to add a report filter.
   a. Click New.
   c. Click the Filter Attribute drop-down menu and select the ticket attribute that will apply to the filter.
   d. In the Filter Type row, select how the values chosen for the filter will be included or excluded from the report.
      Select Inclusive to include tickets with one of the selected values.
      Select Exclusive to exclude tickets with one of the selected values.
7. Click Save.
8. In the Report Details window, click Run Report.

Create a pie chart ticket report

1. In the Chart Type row, select Pie Chart.
2. In the Pie Slice Category row:
   a. Click the drop-down menu and select the appropriate category.
   b. Click the Show drop-down menu and select the appropriate number of items to appear in the pie chart.
   c. Select the Show non-zero items only check box to only display items containing one or more values.
3. Complete the remaining fields as required.
   Click the tooltips for more information.
4. Click Save.
5. (Optional) Click the Report Filters tab to add a report filter.
   a. Click New.
   b. Click the Filter Attribute drop-down menu and specify the ticket attribute that will apply to the filter.
   c. In the Filter Type row, select how the values chosen for the filter will be included or excluded from the report.
      Select Inclusive to include tickets with one of the selected values.
      Select Exclusive to exclude tickets with one of the selected values.
6. Click Save.

Create a table only ticket report

1. In the Chart Type row, select Table Only.
   The Report Details tab window includes options for creating a table chart.
2. Complete the fields as required.
   Click the tooltips for more information.
3. (Optional) Add a report filter.
   a. Click the Report Filters tab.
   b. Complete the fields as required.
4. Click the Report Details window.
5. Click Save to save the report.
6. Click Run Report.

Create ticket billing reports

Billing Reports generate a table showing the total work time, parts cost, and labor cost accrued for a set of tickets.

1. In the toolbar, click Reports.
2. Click New.
3. In the Report Name field, enter a name used to identify the report.
   This name will appear as the report title.
4. (Optional) Click the Report Group drop-down menu and select a report group.
5. Click the Report Type drop-down menu and select Billing Report.
6. Click Save.
7. Click the Category drop-down menu and select the category used to generate the rows in the report.
8. (Optional) Select the Show Filters check box to indicate whether a list of the filters configured for the report will be included in the report.
9. In the Time Range row, determine the amount of time to include in the report.
   The time range applies to the date you select in the Date Attribute for Time Range drop-down menu.
10. Click the Date Attribute for Time Range drop-down menu and select a ticket date attribute to use when applying the values you select for the Time Range.
11. (Optional). Click the Report Filters tab to add a report filter.
   a. Click New.
      The Report Filters Options appear.
   b. Click the Filter Attribute drop-down menu and specify the ticket attribute that will apply to the filter.
   c. In the Filter Type row, select how the values chosen for the filter will be included or excluded from the report.
      Select Inclusive to include tickets with one of the selected values.
      Select Exclusive to exclude tickets with one of the selected values.
12. Click Save.
13. In the Report Details tab, click Run Reports.
Create a custom report

If the preconfigured reports in Help Desk Manager do not show the information you need, you can add a custom report. The following sections provide examples of two custom reports:

- Bar chart showing open tickets by tech
- Table showing tickets closed by request type

Open tickets by tech

This example shows how many open tickets are assigned to each tech. The information is displayed in a bar chart, which you can use to quickly identify techs with the highest number of open tickets. Each bar is subgrouped by ticket priority.

1. In the toolbar, click Reports.
2. Click New.
3. On the Report Basics tab, enter the report name and request type.

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Open Tickets per Tech by Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Group</td>
<td></td>
</tr>
<tr>
<td>Report Type</td>
<td>Ticket Report</td>
</tr>
</tbody>
</table>

4. Click the Report Details tab.
5. As the Chart Type, select Bar chart.
6. As the Bar Category, select what each bar represents. In this example, each bar represents a tech.

<table>
<thead>
<tr>
<th>Bar Category</th>
<th>Assigned Tech</th>
</tr>
</thead>
</table>

7. As the Bar Stack Category, select Priority to subdivide each bar by ticket priority.

<table>
<thead>
<tr>
<th>Bar Stack Category</th>
<th>Priority</th>
</tr>
</thead>
</table>

8. As the Chart Metric, select the measurement that determines the height of each bar. In this example, the height reflects the number of tickets.

<table>
<thead>
<tr>
<th>Chart Metric</th>
<th>Open Time</th>
<th>Avg. Open Time</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Work Time</td>
<td>Avg. Work Time</td>
</tr>
<tr>
<td></td>
<td>1st Response Time</td>
<td>Avg. 1st Response Time</td>
</tr>
<tr>
<td></td>
<td>Tickets</td>
<td>Avg. Tickets</td>
</tr>
</tbody>
</table>

9. Select Show Table to display this information in a table below the bar chart.
11. For this report, leave the time range blank so that it will include all open tickets. When the time range is blank the Date Attribute has no impact, so you can accept the default.

<table>
<thead>
<tr>
<th>Time Range</th>
<th>Relative</th>
<th>Specific</th>
</tr>
</thead>
<tbody>
<tr>
<td>From:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>To:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Use exact date and time</td>
</tr>
<tr>
<td>Date Attribute for Time Range</td>
<td>Date Worked On</td>
<td></td>
</tr>
</tbody>
</table>

12. Click the Report Filters tab, and then click New.

13. Create a filter to include only tickets with a Status of Open.

<table>
<thead>
<tr>
<th>Filter Attribute</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filter Type</td>
<td>Inclusive</td>
</tr>
<tr>
<td>Values</td>
<td>Open</td>
</tr>
<tr>
<td></td>
<td>Pending</td>
</tr>
<tr>
<td></td>
<td>Closed</td>
</tr>
<tr>
<td></td>
<td>Cancelled</td>
</tr>
<tr>
<td></td>
<td>Resolved</td>
</tr>
</tbody>
</table>

14. Click Save, and then click Run Report.

The bar chart shows the number of open tickets for each tech. This information is also shown in a table below the chart.
Tickets closed by request type with work time

This example shows how many tickets of each request type were closed during the previous week. It also shows the total amount of work time for each group of tickets. The information is displayed in a table because tables can include multiple data points for each ticket.

1. From the report list, click New.
2. On the Report Basics tab, enter the report name and request type.

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Tickets Closed Last Week by Request Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Group</td>
<td></td>
</tr>
<tr>
<td>Report Type</td>
<td>Ticket Report</td>
</tr>
</tbody>
</table>

3. Click the Report Details tab.
4. As the Chart Type, select Table only.

5. Select the value used to define the table rows. In this example, the table will include a row for each request type.

<table>
<thead>
<tr>
<th>Row Category</th>
<th>Request Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show</td>
<td>All Items</td>
</tr>
<tr>
<td></td>
<td>Show non-zero items only</td>
</tr>
</tbody>
</table>

6. Select the value used to define the table columns. In this example, leave the Column Category blank. The table will include one data column showing totals for the week.

7. Select the information that will be shown in each table cell.

<table>
<thead>
<tr>
<th>Table Data</th>
<th>Open Time</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Avg. Open Time</td>
</tr>
<tr>
<td></td>
<td>Work Time</td>
</tr>
<tr>
<td></td>
<td>Avg. Work Time</td>
</tr>
<tr>
<td></td>
<td>1st Response Time</td>
</tr>
<tr>
<td></td>
<td>Avg. 1st Response Time</td>
</tr>
<tr>
<td></td>
<td>Tickets</td>
</tr>
</tbody>
</table>

8. Select the time range that the report will include. Select the Round back option to include the previous week from Sunday through Sunday (rather than today and the previous seven days).

<table>
<thead>
<tr>
<th>Time Range</th>
<th>Relative</th>
</tr>
</thead>
<tbody>
<tr>
<td>From:</td>
<td>Week(s)</td>
</tr>
<tr>
<td>To:</td>
<td>Week(s)</td>
</tr>
<tr>
<td>Use exact date and time</td>
<td>Round back to beginning of time periods</td>
</tr>
</tbody>
</table>
9. To include only tickets closed during the specified time range, select Date Closed as the Date Attribute.

<table>
<thead>
<tr>
<th>Date Attribute for Time Range</th>
<th>Date Closed</th>
</tr>
</thead>
</table>

10. Click Save, and then click Run.

The report shows the total number of tickets and total work time for each request type.

<table>
<thead>
<tr>
<th>Email/Outlook</th>
<th>Work Time</th>
<th>Tickets</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>3:00</td>
<td>1</td>
</tr>
<tr>
<td>Facilities</td>
<td>5:30</td>
<td>3</td>
</tr>
<tr>
<td>Hardware</td>
<td>2:00</td>
<td>1</td>
</tr>
<tr>
<td>HR</td>
<td>7:30</td>
<td>2</td>
</tr>
<tr>
<td>IT General/Other</td>
<td>10:15</td>
<td>4</td>
</tr>
<tr>
<td>Network</td>
<td>5:30</td>
<td>1</td>
</tr>
<tr>
<td>Phone/Voicemail</td>
<td>0:00</td>
<td>0</td>
</tr>
<tr>
<td>Printer/Toner</td>
<td>0:00</td>
<td>0</td>
</tr>
<tr>
<td>User Administration</td>
<td>0:00</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>33:45</strong></td>
<td><strong>12</strong></td>
</tr>
</tbody>
</table>

View, print, or download reports

Use the Reports tab to generate a standard or custom report. Help Desk Manager includes several reports you can use to report the status of your support center. These reports are listed in the Report column located in the Reports tab.

To change the output included in the report, click a report in the Report column and update the report details.

You can also create a report schedule to distribute reports at regular intervals. Report groups control access to created reports sorted by Tech and Customer Group. This ensures that each tech is only presented with reports within their scope of work.

1. In the toolbar, click Reports.
2. In the Reports tab, locate the report you want to generate.

   If you created report groups to classify your reports, select a report group in the upper-right corner to filter the list.
3. Click an icon in the right column to run the report.

The following table describes the icons in the Reports tab.

<table>
<thead>
<tr>
<th>ICON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>📀</td>
<td>Displays the report at the bottom of the screen.</td>
</tr>
<tr>
<td>📜</td>
<td>Displays a printable web view in a new browser tab.</td>
</tr>
<tr>
<td>📜</td>
<td>Creates the report in PDF format that you can download and print or distribute.</td>
</tr>
</tbody>
</table>

**Troubleshoot outdated report data**

If the report data is outdated regardless of the specific or relative range you configured in the report, perform the following steps:

1. Log in to Help Desk Manager.
2. In the toolbar, click Reports.
3. In the Reports tab, verify that the Override Dates checkbox is not selected.

**Schedule reports**

Use report schedules to automatically generate one or more reports in PDF format and email them to the specified recipients via their default outgoing email accounts. Recipients can be clients, techs, or people who do not have Help Desk Manager accounts.

This example schedules two asset reports to be distributed at the beginning of every month.

1. In the toolbar, click Reports and then select Report Schedules.
2. Click New.
3. Enter a name to identify this report schedule.
4. Specify how often the report is distributed and when the distribution begins.
5. (Optional) Update the email message to which the reports will be attached.

   ![See the tooltips for more information about any field.]

6. To distribute the report to clients, search for a client and then click the client name.

   If you defined a connection to an LDAP server, the Search LDAP check box is displayed. Select this option to include names from the LDAP directory in the search. Point to the Search LDAP label for more information.
7. To add recipients who are not Help Desk Manager clients and techs, enter their email addresses in the Other Recipients E-Mails field.

8. To distribute the reports to techs:
   a. Click the Tech Recipients tab.
   b. Click Edit.
   c. Select the techs and click Save.

9. Select the reports to include.
   a. Click the Included Reports tab.
   b. Click Edit.
   c. Select the reports and click Save.

10. Click Done.
    The new schedule is activated and available in the Report Schedules screen.
Set up parts and billing

You can track your parts inventory in one or multiple store locations by part number, manufacturer, and model. When parts are deployed to a ticket, Help Desk Manager automatically deducts the part from inventory, allowing you to maintain an accurate parts inventory in your deployment.

You can create an alert that notifies you when your inventory threshold falls below your specified level for parts a client regularly requests. See Configure inventory alerts for details.

Using additional tools in Help Desk Manager you can:

- Add parts to a Customer
- Add parts to a ticket
- Manually add parts
- Configure inventory alerts
- Enable service time blocks
- Customize billing statements

Add parts to a location

1. In the toolbar, click Parts.
2. Click the Inventory tab.
3. In the fields and drop-down menus, select your search criteria and click Search.
   To list all parts, leave all search fields empty and click Search.
4. Click the Storage Location drop-down menu for a specific part and select Customer.
5. In the Add Count field, add the number of available parts.

   To reduce the number of available parts, use a negative number. For example, to change the number of available parts from 6 to 5, enter -1.

6. Click Save.

   When a part inventory reaches zero, the inventory status changes from Available to Back Ordered.

Add parts to a ticket

1. In the toolbar, click Tickets.
2. Click the targeted ticket number.
3. Click the Parts and Billing tab.
4. In the Part Search box, enter and select the appropriate information to locate the part.
5. Click Search.

   The Search Results box displays, displaying the Customer and number of available parts.
6. In the Inventory column, click the part Customer.
   The part displays in the Assigned Parts box.
   To remove defective parts from inventory, enter the number of parts in the DOA field. Help Desk Manager removes the cost of the DOA parts from the ticket and list DOA parts in a separate area in your billing reports.
   To remove an entire parts line item and return the parts back to inventory, click the trash can.
7. Click Save to save your changes.

Manually add parts

1. In the toolbar, click Parts.
2. In the Parts List tab, click New Part.
3. In the Part No. field, enter a part number.
4. Click the Manufacturer drop-down menu and select a manufacturer.
   You can add manufacturers and models at Setup > Device >Manufacturers & Models.
   For more information about adding manufacturers and models, see Defining device types.
5. Click the Model drop-down menu and select a model.
6. In the Description field, enter a description of the item.
7. In the Our Cost and Customer Cost fields, enter the appropriate amounts.
8. Select the Tax Free check box if this item is not applicable to state or local taxes.
9. Click Save.

Configure inventory alerts

Configure the frequency and recipients for all email alerts—for example, when your inventory threshold falls below your specified level for parts a client regularly requests.

1. Click Setup > Parts & Billing > Inventory Alerts.
2. In the Inventory Alerts screen, click the first Inventory Alert Interval drop-down menu and select a value from 0 to 100.
3. Click the second Inventory Alert drop-down menu and select the appropriate alert frequency.
4. In the Default Inventory Alerts Recipients field, enter the email addresses for each recipient who will receive inventory alerts.
   Click the tooltips for more information.
5. Click Save.

Override default inventory alert recipients

1. Click Setup and select Companies and Locations > Locations and Rooms.
2. In the Location Name column, click the appropriate location.
3. Edit the information in the tab windows as required.
4. Click Done.

Enable predefined service time blocks

1. In the toolbar, click Setup > Parts & Billing > Options.
2. In the Parts & Billing Options screen, select the Enable Customer check box.
3. Select the appropriate option to enable time blocks.
4. Click Save.

For an expired block, the usable value may be lower than the block value depending on how much time was used before the block expired.

The amount of service time available for a customer displays within the Ticket Details of a ticket under the customer pop-up. If the value is negative, it appears in red.

Customize billing statements

You can customize billing statements by editing the invoice.html file located in the following directory:

<HelpDeskManager>/bin/webapps/helpdesk/WEB-INF/lib/whd-web.jar/Resources/Invoice.wo/Invoice.html

For example, if you wanted to remove the signature line, you could remove lines 433 - 438:

```xml
<fo:table-row>
  <fo:table-cell number-columns-spanned="<webobject name=LineItemColumnCount></webobject>" padding-top="10mm">
    <fo:block font-family="FreeSans, ArialUnicodeMS, sans-serif" font-size="10pt" text-align="right"><webobject name = "SignatureLbl"></webobject>: <fo:leader leader-length="4.0in" leader-pattern="rule" rule-style="solid" color="black"></fo:leader>
  </fo:block>
</fo:table-cell>
```
After you delete these lines or make any other changes, restart Help Desk Manager to enable your changes.
Manage client feedback

Surveys provide valuable feedback from your clients. After you close a ticket, you can provide your clients the option of completing a survey.

You can link surveys to a specific ticket for a single client, or send surveys as general questionnaires to a number of clients. The survey is located at the top of the ticket e-mail and in the Help History page of the client interface.

Create a survey

You can create an automatic or manual survey that you submit to your clients when a tech closes a ticket. While the survey is optional, the client feedback can help you identify issues with the ticket resolution process and help you improve your help desk operations. When you close the ticket, you can disable a survey for a specific request type.

1. In the toolbar, click Setup > Surveys > Surveys.
2. In the Surveys screen, click New.
3. In the Survey Name and Description fields, enter the appropriate information for your survey.
4. Complete the remaining fields as required.
   
   Click the tooltips for additional information.
5. Click Save.

Set the survey options

1. In the toolbar, click Setup > Surveys > Options.
2. Complete the remaining fields as required.
   
   Click the tooltips for additional information.
3. Click Save.

Create an automatic survey

1. Click Setup and select Tickets > Request Types.
2. In the Request Types column, click the appropriate request type.
3. In the Request Type screen, click the Survey drop-down menu and select a survey.
4. Click Save to automatically implement the survey.

For example, if you click Hardware in the Request Types screen and select Default Survey in the Survey drop-down menu, the client automatically receives the default survey for a hardware request type.

See Defining Request Types for information about defining a request type.
Create a manual survey

You can manually send out surveys to a group of clients by clicking Send Survey in the client search results header. After you submit a survey, you can view but not edit the survey.

1. In the toolbar, click Clients.
2. In the Basic Search or Advanced Search tabs, enter the appropriate information to locate one or more clients.
   To list all clients, leave the search fields blank.
   - Hover your mouse arrow over the selections for tooltips.
3. Click Search.
4. In the search results toolbar, click Send Survey.
5. In the Survey Invitation Mailer screen, click the Survey drop-down menu and select a survey.
6. Edit the survey content (if required).
7. Click Save & Email.

Disable a survey

You can disable a survey for a specific request type so it is not sent to a customer when the ticket is closed.

1. Log in to Help Desk Manager.
2. Click Setup > Tickets > Request Types.
3. Click a request type in the Request Types column.
4. Click the Survey drop-down menu and select None.
5. Click Save.
   - The survey is disabled for the request type.

Create messages

Use this feature to send messages to techs and clients.

1. In the toolbar, click Messages > Create Messages.
2. Click New Message.
3. In the Message screen, complete the fields as required.
   - Click the tooltips for additional information.
4. Click Save.
   - The message is sent to your selected recipients.
Delete messages in bulk

1. In the toolbar, click Messages.
2. Click the Create Messages tab.
3. Shift-click the checkbox in the header of the messages search results to select all messages on all pages of the search results.
4. Click Delete.

View ticket and survey results

You can examine your survey results from within a ticket. Simply open the targeted ticket and click the Survey View icon in the ticket screen.

You can also view the survey summary data on both the ticket and general surveys in the Survey Results screen. Survey reports are the only way to view the results of a general (non-ticket) survey.

1. In the toolbar, click Reports and select Survey Results.
2. In the Survey Results screen, select the survey you want to view.

   To narrow the spoke of the results, complete the information in the fields and drop-down menus.

3. When you complete your selections, click Run Report.

View ticket details

1. In the toolbar, click Tickets.
2. In the Tickets screen, click the appropriate ticket number in the No. column.
3. In the top left corner of the ticket, click the Survey View icon.

View survey reports

To view summary data on both ticket and general surveys:

1. In the toolbar, click Reports and select Survey Results.
2. In the Survey Results screen, select the survey you want to view.
   
   You can also complete the information in the fields and drop-down menus to narrow the scope of the results.
3. When you complete your selections, click Run Report.

Send email ticket surveys

You can send a general email ticket survey to one or more clients for each closed ticket. Clients can access surveys by replying to the email or by selecting History from the top menu.

You can select a survey in the Setup > Tickets > Request Types screen.
1. In the toolbar, click Clients.
2. In the Basic Search and Advanced Search tabs, select the appropriate criteria to locate clients who will receive your survey.
   
   Hover your mouse over Search LDAP for additional information.

3. Click Search.
4. In the generated table, select the appropriate clients to receive the survey.
5. Click Send Survey.
6. In the Survey Invitation Mailer screen, click the Survey drop-down menu and select a survey.
7. Review the survey E-Mail Subject and Message Preview boxes and modify the email message content as required.
   
   Click the tooltips for more information.

8. Click Save & E-Mail.
9. Click OK to send the survey to your selected clients.
Knowledge-centered support

Knowledge-centered support (KCS) is a set of practices that make information available and easily accessible to both clients and techs. With KCS, knowledge is considered a fundamental asset of the technical support organization. The goals of KCS include:

- Improving efficiency within support organizations
- Making customers self-sufficient
- Reducing support costs while increasing customer satisfaction

When an organization implements KCS, content creation becomes an integral part of the support process. Each tech is responsible for contributing new content and updating or improving existing content.

Using Help Desk Manager to build your knowledge store

Within Help Desk Manager, you can use FAQs to capture solutions to common problems and make that information available. Techs can quickly create a new FAQ based on a note within a ticket, or they can .

As you increase the amount of useful information in your system, both clients and techs will be more likely to find the answers they need. Helping clients get answers from FAQs will reduce the number of tickets opened. Clients can provide feedback by rating articles. Use the article ratings to recognize and reward useful content and to improve content that is incomplete or inaccurate.

By default, only admins can edit approved FAQs. To implement the KCS process, consider including the Approved FAQ Edit permission in the Default tech permission set. When techs have this permission, they can update or correct FAQs as needed.

Accessing FAQs in Help Desk Manager

Help Desk Manager promotes self resolution by displaying relevant FAQs to clients as they enter service requests into the Web portal.
In addition, clients can search the FAQs that are available to them, view or edit an FAQ, and link an FAQ to a support ticket.

An FAQ can be available to all Help Desk Manager clients, or it can be limited to a specific audience (for example, only to clients from a certain company).

**Create a new FAQ**

Techs can use FAQs to share information and quickly locate resolutions to common problems. Additionally, clients can search the FAQ knowledge base within Help Desk Manager to locate answers to their questions.

Ensure that the tech permissions for FAQs are defined for each tech in Setup > Techs > Tech Permissions > Other Permissions.

You can create a new FAQ manually, or you can automatically create an FAQ based on a ticket note. If your company is implementing, use this capability to quickly expand your knowledge base using information already captured in case notes.

Beginning in version 12.7, Help Desk Manager includes a new Create FAQ editor. The new editor includes a new interface and provides additional tools for creating and editing your FAQs. The updated editor also allows you to drag and drop images into your Mozilla Firefox and Google Chrome web browsers.
Before you create a new FAQ, search the knowledge base to determine if an existing FAQ answers the question. If so, you can link the existing FAQ to the ticket.

Set tech permissions for FAQs

1. Log in to Help Desk Manager as an administrator.
2. Click Setup > Techs > Tech permissions.
3. Click the tech permission name.
4. Scroll down to the Other Permissions tab.
5. Click FAQ Edit.
   Additional options display.
6. Select FAQs "All" Category Edit to enable tech access to All and Specific FAQ categories. This allows techs to view FAQs in the Create FAQ page for all requests.
7. Select any additional selections as required. See the tooltips for details.
8. Click Save.

Access FAQs in the tech user interface

1. Log in to the tech user interface.
2. Click FAQs in the toolbar.
3. Click New FAQ in the FAQ toolbar.
   The Create FAQ page displays.

If you select FAQs "All" Category Edit in Setup, the tech can access All categories in the Create FAQ page.

Category is identical to the ticket request type.

The tech can also edit an FAQ by selecting Specific and clicking the drop-down arrow to select one or more categories for the FAQ.

When you de-select the FAQ Edit check box, the remaining FAQ permissions are disabled in the Other Permissions tab.

Additionally, the All and Specific categories in the tech user interface are disabled by default, and the tech cannot change the category selection.

Techs can view FAQs assigned to All and Specific categories, but cannot edit these FAQs.

Manually create an FAQ

1. In the toolbar, click FAQs.
2. In the FAQ toolbar, click New FAQ.
3. In the Create FAQ screen, select the categories for this FAQ. Select All for all categories or Specific for selected categories.

<table>
<thead>
<tr>
<th>Create FAQ</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category</td>
</tr>
</tbody>
</table>

4. If you selected Specific, click the Category drop-down menu and select one or more categories.

- This field is populated from the ticket request types. You can add additional request types. See Define request types for more information.
- If a parent or child category is disabled, you do not have the appropriate permissions to access the category level.

5. Enter the question and answer text for this FAQ.

- Question and answer text can include HTML links and formatting, as well as Bulletin Board Code (BBC) tags.

6. If you want to link this FAQ to a related FAQ, click 📈. Then search for the FAQ and click Link FAQ.

7. Use the radio buttons to restrict who can view this FAQ or specify what model the FAQ applies to.

8. In the Attachments row, click Add File to add an attachment. You can attach a supporting document, graphic, or spreadsheet.

9. If you have permission to approve FAQs, select the Approved check box to publish the FAQ. Otherwise, notify an approver that the FAQ is ready for review.

- FAQs can be approved by all admins and by techs with the Approve FAQs permission.

10. If you want the FAQ to expire, select an expiration date and time.

11. Click Save, and then click Done.

Create an FAQ based on a ticket note

1. Open the ticket and click the Ticket Details tab.

2. In the Date column of the Notes section, click in the note’s creation date and time to open the note.

3. In the note editor, click Create FAQ.

4. Click OK at the confirmation dialog to create the FAQ.

- The following elements are automatically populated with information from the ticket:

<table>
<thead>
<tr>
<th>TICKET</th>
<th>FAQ</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request Detail</td>
<td>Question</td>
</tr>
<tr>
<td>Note text</td>
<td>Answer</td>
</tr>
<tr>
<td>Request Type</td>
<td>Category</td>
</tr>
</tbody>
</table>

- The FAQ is created, but it is not approved. Also, any attachments to the note are not attached to the FAQ.

5. Search for the FAQ, select it, and click Edit.
6. Make the following changes as needed:
   - Edit the Question and Answer text to make it appropriate for a general audience. For example, remove people's names and company-specific information.
   - Use the radio buttons to restrict who can view this FAQ or specify what model the FAQ applies to.
   - If the note included an attachment, attach that file to the FAQ.
     If necessary, first download the attachment from the ticket to your computer, and then attach it to the FAQ.

7. If you have permission to approve FAQs, select the Approved check box to publish the FAQ. Otherwise, notify an approver that the FAQ is ready for review.
   
   FAQs can be approved by all admins and by techs with the Approve FAQs permission.

8. If you want the FAQ to expire, select an expiration date and time.

9. Click Save, and then click Done.

Search FAQs

1. Click FAQs in the Help Desk Manager toolbar.

2. Specify the search criteria at the top of the window.

   A disabled category in the Category drop-down list indicates you do not have the appropriate permissions to access the category level.

3. Click Search.
   The FAQs that meet your search criteria are listed.

   You can view any FAQ in the list. Techs with the appropriate permissions can edit FAQs.

   - To sort the results list, click a column header.
   - You can view any FAQ in the list. Techs with the appropriate permissions can edit FAQs.

   A Warning icon 💥 in a Category row indicates a category you cannot access based on your current permissions.

   Some category results may indicate that additional categories are available.

   Click Show Details to view the additional categories.
View or edit an FAQ

1. To open an FAQ:
   a. Search for an FAQ.
   b. In the search results, double-click a row. The FAQ opens in read-only mode.
      If you do not have the required permissions to view an FAQ, a message displays stating that
      the FAQ is no longer available to you.

2. If you have the required permissions, you can edit the FAQ:
   a. In the search results, select a row and click the Edit button.
   b. Update any field. For more information see Create a new FAQ.
   c. Click Save, and then click Done.

      If you do not have the required permissions, a Warning icon ▲ displays next to Delete. This warning
      indicates that you cannot delete the FAQ because it includes categories you cannot access or delete.

Link an FAQ to a support ticket

When an FAQ describes the resolution to an issue or provides information associated with a ticket, you can
link the FAQ to the ticket.

1. Open the ticket details page.
2. In the Notes section, click the creation date to open a new note, or click New to add a new note.
3. Click the Link FAQ button.
4. In the FAQ Search dialog box, search for the FAQ.
5. Click the Link FAQ button on the right side of the FAQ’s row.
   A link to the FAQ is added to the note.
6. Click Save to save the note.
Customize your deployment

This section contains additional information about customizing your Help Desk Manager deployment.

- Deployment considerations
- Customize tickets, notes, instructions, and emails with BBCode
- Customize your server settings

Deployment considerations

When you plan your Help Desk Manager deployment, consider adding additional system RAM and Java Virtual Machine (JVM) heap memory to support the number of techs in your help desk operations. Filling up the JVM heap memory can degrade your Help Desk Manager performance.

Additionally, consider creating a high availability deployment to protect your Help Desk Manager operations from a single point of failure.

Memory sizing and JVM options

Use an estimated number of concurrent tech sessions to determine your memory allocation and which type of deployment best meets your needs. Use tech sessions rather than client sessions, as Tech sessions use much more memory than client sessions.

Help Desk Manager requires additional max heap memory over the Java Virtual Machine default setting. To improve application performance, increase the JVM memory and restart Help Desk Manager.

Clear JVM heap memory

Help Desk Manager deployments can fill up the JVM Heap Memory, which can degrade performance. To avoid this issue, periodically restart Help Desk Manager to clear the heap memory.

See the appropriate procedure to automatically restart the operating system on your system hosting Help Desk Manager.

- Microsoft Windows
- Linux

Automatically restart Windows

This procedure applies to Windows Server 2012 and later.

1. Log in to the HDM server as an administrator.
2. Locate and open the Task Scheduler.
3. In the Actions column, click Create Basic Task to start the Create a Basic Task Wizard.
4. In the Name field, enter a descriptive task name (such as Restart Help Desk Manager), and click Next.
5. Select Daily, and click Next.
6. Enter the trigger options.
   a. Select a Start date and time.
   b. Define how often the restart should occur.
   c. Click Next.
7. Select Start a program, and click Next.
8. In the Program/script field, enter:
   net
9. In the Add arguments field, enter:
   stop webhelpdesk
10. Click Next.
11. Review the task name, trigger, and action details, and click Finish.

To create a second scheduled task to restart HDM, repeat the steps listed above.

Schedule the procedure to start at least one minute later than the stop command to ensure that the service has completely stopped before attempting to restart.

**Automatically restart Linux**

Create a nightly cron job that calls the stop or start scripts as root or use sudo.

You can create the cron job using the following command:

```bash
/usr/local/HelpDeskManager/HDM stop /user/local HelpDeskManager/ HDM
```

**High availability deployments**

Create a high availability Help Desk Manager by configuring a multi-instance Tomcat deployment on Linux or Microsoft Windows.

See the following sections for details:

- Monitor deployment on macOS
- Configure multiple instance Tomcat deployments
- Configure multiple instance Tomcat daemons

**Monitor deployments on macOS**

Apple OS X Server 10.6 and earlier included WebObjects.

1. Install WebObjects.
2. Run the Help Desk Manager installer to extract the application to /Library/WebHelpDesk.
3. Run the following script to configure Help Desk Manager with WebObjects:
   ```bash
   sudo /Library/WebHelpDesk/bin/UpdateWebObjectsConfiguration
   ```
4. In WebObjects Monitor, add a new application named Helpdesk with the following path:
   ```bash
   /Library/WebHelpDesk/bin/webapps/helpdesk/WEB-INF/Helpdesk.woa/Helpdesk
   ```
5. In WebObjects Monitor, add a new application named HelpdeskDaemon with the following path:
   /Library/WebHelpDesk/bin/webapps/helpdesk/WEB-INF/Helpdesk.woa/Helpdesk

6. In the instance configuration page for HelpdeskDaemon, add the following to the Additional Arguments setting:
   -DWHDDaemonMode=dedicated

   Only one Help Desk Manager instance should ever be running as a daemon.

After you start the applications in WebObjects Monitor, connect to Help Desk Manager using the following URL:

http://localhost/cgi-bin/WebObjects/Helpdesk.woa

**Configure multiple instance, high availability Tomcat deployments**

Apache Tomcat is an open source software product that creates both a Web and application server for your enterprise. The software provides a Web container that enables Java servlets and Run pages, which support Java code running along with a Web server. You can run multiple-instance Tomcat deployments on Linux installations.

Before you install Tomcat, perform the following procedures on your Linux server:

1. Download a supported version of Apache Tomcat from the Apache Tomcat Core 7 website.
   
   See the system requirements to verify the supported Tomcat version for your Help Desk Manager version.

2. Unzip the files to a directory you create on your Tomcat server running Linux.
   For example: /cluster/apache-tomcat-7.0.90

   This location will be referred to as template_tomcat_home_directory in this procedure.

3. In your <template_tomcat_home_directory>/bin directory, add the execution privilege to all scripts using the following command:
   chmod 744 template_tomcat_home_directory/bin/* .sh

   This command does not apply for Apache Tomcat Core 8.

4. Download the Apache httpd server version for your operating system from the Apache HTTP Server Project site.
   
   See Compiling and Installing at the Apache HTTP Server Project Website for information about installing HTTP Server.

5. Install Apache httpd server using yum search and install commands.

6. Install the latest version of SolarWinds MSP Help Desk Manager for Linux from the rpm package.
   The default installation directory is:
   /user/local/N-able Technologies/Help Desk Manager

   This location will be known as <whd_home> in this procedure.

7. Start Help Desk Manager.

8. Connect to the appropriate database.
9. Ensure that Help Desk Manager is operating efficiently.
10. Stop Help Desk Manager.

Install multiple tomcat instances

You can create multiple Tomcat instances that point to the <tomcat_home>/webapps directory. These Tomcat instances run as separate processes with their own long files, port numbers, and resources.

1. Copy the template_tomcat_home_directory instance to /cluster as a Tomcat1 directory.
   This directory will be referred to as TOMCAT_1_HOME in this procedure.
2. Add execute privileges to all scripts in the TOMCAT_1_HOME directory.
   Execute:
   ```
   chmod 744 tomcat_1_home/bin/*sh
   ```
3. Remove the <TOMCAT_1_HOME>webapps directory.
   Execute:
   ```
   rm -rf TOMCAT_1_HOME/webapps
   ```
4. Create a webapps soft link in the <TOMCAT_1_HOME> directory pointing to <template_tomcat_home_directory>/webapps.
   Execute:
   ```
   ln -s template_tomcat_home_directory/webapps/ webapps
   ```
5. Update the TOMCAT_1_HOME/conf/server.xml file to avoid port conflicts.
   Update the default values listed below:
   ```
   <Server port="8005" shutdown="SHUTDOWN">
   <Connector port="8080" protocol="HTTP/1.1" connectionTimeout="20000" redirectPort="8443" />
   <Engine name="Catalina" defaultHost="localhost" jvmRoute="worker1">
   to the following values:
   ```
   <Server port="8100" shutdown="SHUTDOWN">
   <Connector port="8200" protocol="HTTP/1.1" connectionTimeout="20000" redirectPort="8443" />
   <Engine name="Catalina" defaultHost="localhost" jvmRoute="worker2">
   If these ports are reserved, use another set of ports. SolarWinds MSP recommends having a consistent port numbering convention to avoid conflicts.
6. Add the following value:
   ```
   <Connector port="8300" protocol="AJP/1.3" redirectPort="8443" />
   ```
7. Update the TOMCAT_1_HOME logback-config.xml file so it points to a correct log directory.
   Execute:
   ```
   <File>TOMCAT_1_HOME/logs/whd-spring.log</File>
   <fileNamePattern>TOMCAT_1_HOME/logs/whd-spring.%d{yyyy-MM-dd}.log</fileNamePattern>
   ```
8. Update the `catalina.sh` script in the `TOMCAT_1_HOME/bin` directory to accommodate `TOMCAT_1_HOME` port changes in the `server.xml` file and modify `activemq.broker.port` to avoid conflicts.

   Update the script as follows:
   `-Djava.endorsed.dirs=TOMCAT_1_HOME/webapps/endorsed`
   `-DWHDconfig=TOMCAT_1_HOME/webapps/.whd.properties`
   `-Dlogback.configurationFile=TOMCAT_1_HOME/logback-config.xml`
   `-DWHDPort=8200`
   `-DWHDPrivateBaseUrl=http://localhost:8200`
   `-Dactivemq.broker.port=61618`

9. Edit the Apache `httpd.conf` file, adding a new worker.

   Update the default values listed below:
   ```
   <Proxy balancer://cluster>
   BalancerMember http://localhost:8080 loadfactor=1 route=worker1
   ProxySet lbmethod=byrequests sticky=JSESSIONID|jsessionid|wosid
   </Proxy>
   ```

   to the following values:
   ```
   <Proxy balancer://cluster>
   BalancerMember http://localhost:8080 loadfactor=1 route=worker1
   BalancerMember http://localhost:8200 loadfactor=1 route=worker2
   ProxySet lbmethod=byrequests sticky=JSESSIONID|jsessionid|wosid
   </Proxy>
   ```

10. Restart the Apache `httpd` service and both Tomcat instances.

11. Start Help Desk Manager.

Configure multiple instance Tomcat daemons

You can configure multiple instance Tomcat daemons by editing the `tomcat_web_template.xml` file located at:

   `<HelpDeskManager>/conf`

For multiple-instance Help Desk Manager installations, use the following guidelines:

- Configure one instance to provide either dedicated or background daemon services. Having more than one instance provide daemon services can result in duplicate tickets and unnecessary use of system resources.
- Set the single daemon instance to either dedicated or background. Set the remaining instance to `none`.
- Ensure that all but one instance is running without daemon services.
  For example:
  
  WHDDaemonMode=none
Configuration options

When you configure your daemon settings, use the following options:

- **Dedicated.** The Help Desk Manager installation instance functions only as a daemon, and the login page is disabled.
- **Background.** The Help Desk Manager instance functions as a daemon, but users can also log in to it.
- **None (default).** The Help Desk Manager instance does not execute daemon tasks.

To configure a multiple instance installation, set the memory, the Tomcat deployment descriptor, and the WebObjects daemon mode.

You can configure only one Help Desk Manager instance to run as the daemon—either in dedicated or background mode. SolarWinds MSP recommends running the instance in background mode so that it can be restarted when required—on a more frequent basis than the front-end instances—without interfering with the front-end application.

Memory allocation

Allocate at least 256MB of RAM to your daemon processes. If the Help Desk Manager DaemonMode parameter is set to background, allocate an additional 256MB RAM beyond the amount allocated to other instances. This RAM configuration will support the daemon services memory resources in addition to supporting the application user interface.

See the following sections to set the daemons required for multiple Tomcat instances:

- **Set the Tomcat daemon**
- **Set the Tomcat daemon memory**
- **Set the Web Objects daemon memory**

Set the Tomcat daemon

1. **Stop Help Desk Manager.**
2. Open the following file:
   ```
   <HelpDeskManager>\conf\tomcat_web_template.xml
   ```
3. Set the Help Desk Manager Daemon Mode (near the end of the xml file) setting for the instance type described above.
4. Save the file.
5. **Restart Help Desk Manager.**

Set the daemon memory

1. **Stop Help Desk Manager.**
2. Open the following file:
   ```
   <HelpDeskManager>\conf\whd.conf
   ```
3. Change the MAXIMUM_MEMORY setting to:
   
   MAXIMUM_MEMORY=1024

4. Save the whd.conf file.

5. Restart Help Desk Manager.

Set the Web Objects daemon mode

1. **Stop Help Desk Manager.**
2. Open the wrapper_template.conf file located at:
   
   <HelpDeskManager>/bin/wrapper/conf/wrapper_template.conf

3. Add the following parameter to the end of the # Java Additional Wrappers section:
   
   wrapper.java.additional.14=-DHMDaemonMode=background

4. Save the file.

5. **Restart Help Desk Manager.**

SolarWinds MSP recommends creating a separate WebObjects Monitor application called HelpdeskDaemon for the daemon instance. This naming convention ensures the WebObjects adapter does not attempt direct login requests intended for the Helpdesk instance to the daemon instance.

When completed, set the daemon instance application path to:

/Library/HelpDeskManager/bin/webapps/helpdesk/WEB-INF/Helpdesk.woa/Helpdesk

Since the default daemon mode is `none`, setting the HDMDaemonMode argument for non-daemon instances is not required.
Customize tickets, notes, instructions, and emails with BBCode

Help Desk Manager supports Bulletin Board Code (BBCode)—a lightweight markup code for formatting text. BBCode tags use keywords encapsulated with square brackets.

Using BBCode, you can:

- Highlight text in an email
- Configure a clickable link
- Highlight important information in a device note

Help Desk Manager uses its own customizable implementation of BBCode. Below is an example of BBCode you can use in a Web page:

```html
[size=20]Title[/size]
<p>
Lorem ipsum [b]dolor sit[/b] amet,
sociis natoque [i]penatibus et magnis[/i] dis parturient montes, nascetur
ridiculus
</p>

Below is a list using BBCode.

[list]
[*]Fusce tellus. Proin in tellus sit amet nibh dignissim sagittis.
[*]Sed convallis magna eu sem. Maecenas sollicitudin.
[/list]
[*][color=blue]FAQ link: [/color] [faq id=1]
[*][u]FAQ link:[/u] <faq id=2>
[/list]

This text—a mixture of BBCode and HTML—appears in the following format:
Help Desk Manager stores transformation rules for tags in the following location:

helpdeskmanager/bin/webapps/helpdesk/WEB-INF/Helpdesk.woa/Contents/Resources/bb_config.xml

The following sections provide additional information about working with BBCode to format custom information in Help Desk Manager:

- Applying basic formatting
- Creating your own tags
- Adding clickable links

Apply basic formatting

Basic markup follows a simple structure:

- Simple tags: `[tag]something[/tag]`
- Simple parameterized tags: `[tag=value]something[/tag]`
- Complex parameterized tags: `[tag value1="xxx" value2="yyy"]something[/tag]`

The following table lists the tags supported by Help Desk Manager:

<table>
<thead>
<tr>
<th>TAG</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>[i]italics[/i]</code></td>
<td>Formats the text in italics.</td>
</tr>
<tr>
<td><code>[b]bold[/b]</code></td>
<td>Formats the text in bold.</td>
</tr>
<tr>
<td><code>[u]underscored[/u]</code></td>
<td>Underlines the text.</td>
</tr>
<tr>
<td><code>[faq id=number]</code></td>
<td>Provides a link to an existing FAQ.</td>
</tr>
<tr>
<td>TAG</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-----</td>
<td>-------------</td>
</tr>
<tr>
<td>[quote]Text[/quote]</td>
<td>Adds a quote to your text.</td>
</tr>
<tr>
<td>[code]your code here[/code]</td>
<td>Embeds your code in one line of text.</td>
</tr>
<tr>
<td>[list][<em>]First item [</em>]Second item [/list]</td>
<td>Creates a list using your defined symbols.</td>
</tr>
<tr>
<td>[email]address[/email]</td>
<td>Adds a link to an email address.</td>
</tr>
<tr>
<td>[email=address]Text[/email]</td>
<td>Adds a predefined email address.</td>
</tr>
<tr>
<td>[size=number of pixels]Text[/size]</td>
<td>Defines the text size by specific number of pixels. The maximum value is 38 pixels.</td>
</tr>
</tbody>
</table>

You can also use the following HTML tags with BBCode tags:

- `<li>`
- `<ul>`
- `<ol>`
- `<font>`
- `<br />`
- `<p>`
- `<pre>`
- `<center>`
- `<faq>`
- `<hr>`
- `<strong>`

You can implement BBCode in many areas, such as ticket subjects, request details, notes, and custom field descriptions.
Most ticket fields support BBCode, but some fields (such as secondary email fields in your account details) do not support these fields. Be sure to test the code prior to implementation.

Create your own tags

You can create your own tags in the bb_config.xml file. For example, to use strike-through text, add the following custom tag definition to bb_config.xml:

```xml
<!-- S -->

<match name="s">
  <regex>(?s)(?i)[s](.*?)[/s]</regex>
  <replace><![CDATA[
    <strike>$1</strike>
  ]]> </replace>
</match>
```

To apply the formatting, save your changes and restart Help Desk Manager.

Add clickable links

BBCode can detect HTTP and FTP links, emails, and universal naming control (UNC) paths, transforming them into clickable links. If you add a clickable link to a YouTube or Vimeo video, Help Desk Manager can embed and display the video instead of the link.

You can also disable clickable links as well. In the bb_config.xml file, you can disable embedding video instead of displaying a link by locating all rules with a name starting with auto-youtube (or auto-vimeo) and commenting them out with the following comment tag:

```xml
<!-- and -->
```

When completed, save your changes and restart Help Desk Manager to see the link instead of the video.

Below is an example of a clickable link using BBCode.
When you are working on an incident or writing an FAQ, you can refer to other tickets, referencing a specific ticket or terms like request, case, or problem. To transform these references into clickable links that open the referenced tickets, create a rule.

To create a rule linking to other tickets, add the following syntax to the `bb_config.xml` file:

```xml
<match name="TicketLink" alwaysProcess="true">
  <regex>(?s)(?i)
  (\?:ticket|incident|case|problem|request)\s*([0-9]+)</regex>
  <replace><![CDATA[
<a href="http://HelpDeskManager.com:8081/helpdesk/WebObjects/Helpdesk.woa/wa/TicketActionsview?ticket=$2">$1$2</a>
]]></replace>
</match>
```

Be sure to replace the URL with the link to your system.

Entering case 22 automatically creates a link to case 22, as shown below.
Customize your server settings

The `whd.conf` server configuration file defines your server options, such as the http and https port, Java Virtual Machine memory, and server IP address. This file is located at:

```
<HelpDeskManager>/conf/whd.conf
```

When you upgrade Help Desk Manager, the upgrade procedure only replaces the `whd.conf.orig` file located in the same directory. Use this file as a reference for new options available in the upgraded version. You can copy options into the existing `whd.conf` file or replace the `whd.conf` file with the `whd.conf.orig` file and edit the file as needed.

If you update the file, restart Help Desk Manager for changes to take effect. On Help Desk Manager systems running Microsoft Windows Server, restart your system using the Start menu option. Restarting Windows Services will not apply your configuration changes.

The following sections explain how to customize and use the default settings in the `whd.conf` file.

- Help desk ports
- Privileged networks
- Keystore settings (for SSL connections)
- Memory allocation
- Database connections
- Java command line options
- IP address
- JVM arguments

Unsecured and secured ports for login

Help Desk Manager uses the following unsecured and secure ports for log in:

```
DEFAULT_PORT=8081 HTTPS_PORT=443
```
The Apache Tomcat application server that hosts Help Desk Manager is configured to use non-secure http on port 8081 by default. To run on a different http port, change the DEFAULT_PORT value. Be sure that the newly-selected port is available, or Help Desk Manager will not be able to start.

To run the application over https, uncomment the HTTPS_PORT option. To use the standard https port (443), the port must be available or Help Desk Manager will be unable to start. When the application successfully starts up on the configured https port, it automatically generates a self-signed certificate at:

```
<HelpDeskManager>/conf/keystore.jks
```

No redirect to HTTPS

```
NO_REDIRECT=true
```

When both the DEFAULT_PORT and HTTPS_PORT are enabled, the default behavior is to automatically redirect all http requests to https. If this is not the desired behavior, uncomment the NO_REDIRECT=true option.

URL ports (optional)

```
URL_DEFAULT_PORT=8081  URL_HTTPS_PORT=443
```

In some deployments, Help Desk Manager needs to use a port other than the Tomcat port in URLs it generates for external links.

For example, a Tomcat web server can be configured to route requests for the default port (80) to go to the default Help Desk Manager port (8081) using a proxy pass. In this case, Help Desk Manager should generate URLs with port 80, rather than port 8081. Port 8081 could be configured behind a firewall and be unreachable from other systems.

Tomcat server port

```
TOMCAT_SERVER_PORT=23010
```

The port that Tomcat monitors for start/stop commands. If you are running multiple Tomcat instances, each instance on the same machine must use a different port.

Mail notification port

```
#MAIL_NOTIFICATION_PORT=79
```

Using the command `finger nm_notifyuser` to send the text `finger nm_notifyuser` to the MAIL_NOTIFICATION_PORT triggers the email daemon to check for new mail. Deploying this command also stops automatic email account polling.

The default notification port is 79. To disable the mail notification listener, comment out this setting or set it to -1.

For more information on this port setting, see Request for Comments (RFC) 4146 on the Internet Engineering Task Force (IETF) website at www.ietf.org.

Java home location

```
JAVA_HOME=<homedirectory>
```

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All Help Desk Manager installers include a Java JVM as part of the installation package, so a separate Java install is not required. While not recommended, it is still possible to use a different JVM by providing the path to the JRE in this setting. On Windows, the path would be:

JAVA_HOME=C:\Program Files\Java\jre8

**IP address**

IP_ADDRESS=

By default, Tomcat listens on the configured `DEFAULT_PORT` and `HTTPS_PORT` for all IP addresses assigned to the machine. To limit Tomcat to a specific port, use this setting.

**Privileged networks**

Privileged networks are networks that allow database updates.

In the `whd.conf` server configuration file, the `PRIVILEGED_NETWORKS=` setting identifies networks that allow database updates. If the database requires an update, browser connections from hosts not belonging to these privileged networks receive a message indicating an update is in progress.

> Use the `PRIVILEGED_NETWORKS=` setting when installing headless servers.

You can customize the browser message by editing `login.msg.applicationUpdateInProgress` in the custom labels file.

To remove the info popup icon on this page, use an empty entry for:

`login.msg.applicationUpdateInProgressHelp`

The localhost (127.0.0.1) is always permitted to update. However, a Windows server with multiple IP addresses may not respond to the localhost address. In this example, the `IP_ADDRESS` option must be set to one of the server IPs, and the `PRIVILEGED_NETWORK` should also use that same IP.

**Keystore settings (for SSL connections)**

The keystore settings contain the password Help Desk Manager should use to access the Java keystore. The Java keystore comprises the certificate used for SSL connections. Both the Java keystore and the certificate inside it (aliased by the name tomcat) must use this password.

The following table lists the keystore settings.

<table>
<thead>
<tr>
<th><strong>SETTING</strong></th>
<th><strong>DESCRIPTION</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><code>KEYSTORE_PASSWORD=changeit</code></td>
<td>If you are using SSL, ensure that the password matches the password set when you created the new tomcat keypair.</td>
</tr>
<tr>
<td><code>KEYSTORE_FILE=</code></td>
<td>The default keystore file is:</td>
</tr>
<tr>
<td></td>
<td>&lt;HelpDeskManager&gt;/conf/keystore.jks</td>
</tr>
<tr>
<td>SETTING</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>KEystore_type=JKS</td>
<td>The keystore type can be JKS (default) or PKCS12.</td>
</tr>
</tbody>
</table>

**Memory allocation**

Most Help Desk Manager systems perform well on 3.0 GHz systems with 3GB RAM. However, when you create a large number of techs, consider the hardware used and the system configuration. SolarWinds MSP recommends adding 1GB of memory to the Help Desk Manager server for every 10 additional techs.

**Database connections**

DATABASE_CONNECTIONS=10

The maximum number of connections made between the Help Desk Manager application and the configured database. Larger installations may want to increase this value. One connection for every five simultaneous users is a conservative ratio.

**Java command line options**

JAVA_OPTS=""

Use this property to override the default options for several Help Desk Manager settings. Place the entire set of arguments between the pair of quotes, and follow the format:

JAVA_OPTS="-Darg1=true -Darg2=true"

This property is only effective on Linux servers. For Windows servers, additional JVM arguments must be specified in the Java Additional Parameters section of the wrapper_template.conf file located at <HelpDeskManager>/bin/wrapper/conf/wrapper_template.conf.

The following table provides a list of the available command-line options.

<table>
<thead>
<tr>
<th>OPTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>-DWHDEmailCheckInterval=60</td>
<td>Sets the number of seconds between each email check.</td>
</tr>
<tr>
<td>-DWHDLdapPasswordCacheHours=168</td>
<td>Sets the number of hours LDAP passwords are cached in the Help Desk Manager database. Enter 0 to disable caching.</td>
</tr>
<tr>
<td>OPTION</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
</tr>
<tr>
<td>-DWHDDashboardEnabled=true</td>
<td>Enables the Tickets Dashboard option in the user interface. Set to false to remove the Tickets &gt; Dashboard tab for all users.</td>
</tr>
<tr>
<td>-DWHSql=false</td>
<td>Enables SQL debug logging to the helpdesk.log file. Set to true to enable SQL debug logging to helpdesk.log</td>
</tr>
<tr>
<td>-DWHDaemonMode=background</td>
<td>Describes how the targeted daemon will run in this instance. Set to background to run a daemon as a background process.</td>
</tr>
</tbody>
</table>

**JVM arguments**

JVM arguments are flags that are passed to the Java Virtual Machine at the time the application is launched. On Linux machines, they can be provided through the JAVA_OPTS setting in the whd.conf file. Configure Windows machines located at:

HDM_home>/bin/wrapper/conf/wrapper_template.conf

For example, on a Linux installation, you could disable concurrent request handling and set the Casper requestor thread count to 6 by setting JAVA_OPTS in the whd.conf file as follows:

JAVA_OPTS="-DWHDconcurrentRequests=false -DCasper9RequestorThreadCount=6"

The syntax for Windows machines (in wrapper_template.conf) is slightly different:

wrapper.java.additional.12=-DWHDconcurrentRequests=false
wrapper.java.additional.13=-DCasper9RequestorThreadCount=6

ℹ️ The number to use for each line depends on your particular configuration. Additionally, if you are adding arguments, you must use -D<argument>.
<table>
<thead>
<tr>
<th><strong>ARGUMENT</strong></th>
<th><strong>VALUE</strong></th>
<th><strong>DEFAULT</strong></th>
<th><strong>DESCRIPTION</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>activemq.broker.port</td>
<td>&lt;port&gt;</td>
<td>61616</td>
<td>Defines port used by ActiveMQ. Needs to be unique per instance if you plan to run multiple Help Desk Manager instances on a single machine.</td>
</tr>
<tr>
<td>Casper9RequestorThreadCount</td>
<td>integer</td>
<td>4</td>
<td>Provides number of threads sending REST requests to the JSS server during asset synchronization using Casper 9 plug-in.</td>
</tr>
<tr>
<td>WHDlog4jConfigOverride</td>
<td>true</td>
<td>false</td>
<td>If true, defines Help Desk Manager does not use the database settings configured at Setup &gt; General &gt; Logs to override the standard configuration of log4j.</td>
</tr>
<tr>
<td>whd.smtp.host</td>
<td>&lt;host&gt;</td>
<td></td>
<td>Defines the default SMTP server host to use when running in hosted mode.</td>
</tr>
<tr>
<td>whd.smtp.port</td>
<td>&lt;port&gt;</td>
<td></td>
<td>Defines the default SMTP server port to use when running in hosted mode.</td>
</tr>
<tr>
<td>whd.stdDeploy</td>
<td>true</td>
<td>false</td>
<td>Indicates that Help Desk Manager is running in a standard deployment. Standard deployment is the default configuration the Help Desk Manager installer provides, with an embedded Tomcat deployment at <code>&lt;HDM_home&gt;/bin/tomcat/</code>, the Help Desk Manager application at <code>&lt;HDM_home&gt;/bin/webapps/</code>, and the configuration files at <code>&lt;HDM_home&gt;/conf/</code>. The Help Desk Manager start script automatically supplies this parameter.</td>
</tr>
<tr>
<td>org.apache.tomcat.util.</td>
<td>true</td>
<td>false</td>
<td>Is an essential argument for the Spring servlet. It allows special characters from whduser_helpdesk cookie to be parsed. The argument is set to true for all standard deployments where the parameter is provided automatically by the Help Desk Manager start script or wrapper_template.conf. The same argument should also be applied also for non-standard deployments.</td>
</tr>
<tr>
<td>http.ServerCookie.ALLOW_</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HTTP_SEPARATOR_IN_V0</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WHDconnections</td>
<td>&lt;count&gt;</td>
<td>10</td>
<td>Provides the number of allowed simultaneous connections to the database. The actual number used can be twice this value, and even a few more when certain background processes are running.</td>
</tr>
<tr>
<td><strong>ARGUMENT</strong></td>
<td><strong>VALUE</strong></td>
<td><strong>DEFAULT</strong></td>
<td><strong>DESCRIPTION</strong></td>
</tr>
<tr>
<td>----------------------------</td>
<td>-----------</td>
<td>-------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>WHDconcurrentRequests</td>
<td>true</td>
<td>false</td>
<td>Indicates whether Help Desk Manager should process requests sequentially or simultaneously (in separate threads). There is a known risk of deadlock when concurrent requests are enabled and multiple browser windows are open for a given session. However, disabling concurrent requests can result in degraded performance when a request is slow to respond – such as a request to generate a computation-intensive report.</td>
</tr>
<tr>
<td>WHDhosted</td>
<td>true</td>
<td>false</td>
<td>(Hosted) Determines whether Help Desk Manager should run in hosted mode. When running in hosted mode, the Help Desk Manager hosted password must also be provided. Hosted mode requires an account ID to be included in the login URL, and disables certain features (e.g., database and log settings). Only customers who are authorized hosting providers have access to Help Desk Manager hosted features.</td>
</tr>
<tr>
<td>WHDhostedStandalone</td>
<td>true</td>
<td>false</td>
<td>(Hosted) Determines whether Help Desk Manager should run in hosted standalone mode. When running in hosted standalone mode, certain features are disabled (e.g., database and log settings). Unlike regular hosted mode, only one account is serviced, and the login URL does not need to include an account ID. Help Desk Manager uses this mode is used when the installation with its own database is hosted.</td>
</tr>
<tr>
<td>WHDhostedAlertsFeed</td>
<td>&lt;url&gt;</td>
<td></td>
<td>(Hosted) Optional URL to an RSS feed used to generate Messages in hosted accounts.</td>
</tr>
<tr>
<td>WHDhostedSubscriberRange</td>
<td>x..y</td>
<td>x..</td>
<td>(Hosted) Provides range of subscriber accounts to be serviced by this hosted instance. If y is omitted, it defaults to 1000000. Used only when running in hosted mode as a daemon, to enable distribution of the hosted daemon load across multiple daemon instances.</td>
</tr>
<tr>
<td>WHDhostName</td>
<td>&lt;host&gt;</td>
<td>webhelpdesk.com</td>
<td>(Hosted) Identifies host to use in URLs back to Help Desk Manager.</td>
</tr>
<tr>
<td><strong>ARGUMENT</strong></td>
<td><strong>VALUE</strong></td>
<td><strong>DEFAULT</strong></td>
<td><strong>DESCRIPTION</strong></td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------</td>
<td>-------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>WHDsecureHostName</td>
<td>&lt;host&gt;</td>
<td>secure.webhelpdesk.com</td>
<td>(Hosted) Identifies host to use in HTTPS URLs back to Help Desk Manager.</td>
</tr>
<tr>
<td>WHDdemo</td>
<td>true</td>
<td>false</td>
<td>Determines whether Help Desk Manager should run in demo mode. Running in demo mode, disables certain features such as database and log settings and the ability to save Setup menu changes. Also replaces occurrences of DemoSandbox.woa in URLs with the name of the application as defined in WebObjects Monitor (plus .woa).</td>
</tr>
<tr>
<td>WHDliveDemo</td>
<td>true</td>
<td>false</td>
<td>Determines whether Help Desk Manager should run in live demo mode. Allows some functionality that regular demo mode does not, such as changing the look and feel.</td>
</tr>
<tr>
<td>WHDsupport</td>
<td>true</td>
<td>false</td>
<td>Defines whether Help Desk Manager should run as the Help Desk Manager support application. When running as the Help Desk Manager support application, clients must provide a license key with an unexpired support license to submit a ticket. The parameters of their support license display in the Tech view of their tickets.</td>
</tr>
<tr>
<td>TEST</td>
<td>true</td>
<td>false</td>
<td>Determines whether Help Desk Manager should run in TEST mode. Test mode enables certain features that are helpful during development, e.g., the ability to run individual daemons manually, by clicking links at the footer of each web page; the ability to preview e-mails in the browser when editing a ticket; and the ability to edit help popups by clicking on labels. Test mode also provides some protections like disabling e-mail from being sent to clients that are created when bulk-synchronizing with an LDAP connection.</td>
</tr>
<tr>
<td>WHDsql</td>
<td>true</td>
<td>false</td>
<td>Enables logging of each SQL statement.</td>
</tr>
<tr>
<td>WHDtimeouts</td>
<td>true</td>
<td>false</td>
<td>Designates whether LDAP and asset discovery connections timeout when an error occurs while attempting to establish a connection. Timeout duration is six daemon intervals.</td>
</tr>
<tr>
<td><strong>ARGUMENT</strong></td>
<td><strong>VALUE</strong></td>
<td><strong>DEFAULT</strong></td>
<td><strong>DESCRIPTION</strong></td>
</tr>
<tr>
<td>------------------------</td>
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<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>WHDFingerPort</td>
<td>&lt;port&gt;</td>
<td>79</td>
<td>Prescribes the port on which Help Desk Manager listens for finger protocol requests, which indicate that it should begin an EmailDaemon cycle to get new e-mail.</td>
</tr>
<tr>
<td>WHDIgnoreClientPassword</td>
<td>true</td>
<td>false</td>
<td>Allows users to log in without providing a valid password. We probably don’t want to document this feature for public consumption.</td>
</tr>
<tr>
<td>WHDPrivilegedNetworks</td>
<td>&lt;list&gt;</td>
<td>localhost</td>
<td>Provides Classless Inter-Domain Routing (CIDR)-formatted, comma-separated list of addresses or networks that determines which browsers have permission to do one of the following:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Configure the database connection settings.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Begin the database schema update process.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Replace an invalid license key after a version update.</td>
</tr>
<tr>
<td>WHDPort</td>
<td>&lt;port&gt;</td>
<td>80 if hosted</td>
<td>Prescribes the port to use in URLs that refer back to Help Desk Manager. If -1 is given, the port is taken from PREFERENCE.HOST_PORT. If hosted, 80 is used regardless of this setting.</td>
</tr>
<tr>
<td>WHDSecurePort</td>
<td>&lt;port&gt;</td>
<td>443</td>
<td>Defines the port to use for HTTPS URLs that refer back to Help Desk Manager. If a standard Tomcat deployment (see whd.stdDeploy), -1 will be read as 443. If not a standard Tomcat deployment, the port is taken from PREFERENCE.HOST_PORT_SSL. If hosted, 443 is used regardless of this setting.</td>
</tr>
<tr>
<td>WHDLabelsFolder</td>
<td>&lt;path&gt;</td>
<td>&lt;HDM_home&gt;/conf/labels/Helpdesk.woa/..</td>
<td>(Hosted/Dev) Path to labels folder. Regardless of this setting, if a standard Tomcat deployment (see whd.stdDeploy), &lt;HDM_home&gt;/conf/labels will be searched first, and then Helpdesk.woa/Contents/Resources/labels. Otherwise, the default path will be the folder above Helpdesk.woa.</td>
</tr>
<tr>
<td>ARGUMENT</td>
<td>VALUE</td>
<td>DEFAULT</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>------------------------</td>
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</tr>
<tr>
<td>WHDReportPluginDir</td>
<td>&lt;path&gt;</td>
<td>/Helpdesk.woa/.. /ReportPlugIns</td>
<td>Determines path to the report plugins directory or directories. The default path is in the ReportPlugins directory above Helpdesk.woa. Multiple directories may be specified by separating them with the path separator character (‘:’). If the path string begins with a plus sign (+’), the provided paths will be included in addition to the default path. During development, the path may point to a classes folder containing the unarchived contents of a plugin. Also during development, changes to plugins are automatically reloaded. (If development mode isn’t detected automatically, it can be forced with the JVM argument er.extensions.ERXApplication.developmentMode=true.)</td>
</tr>
<tr>
<td>WHDDiscoveryPluginDir</td>
<td>&lt;path&gt;</td>
<td>/Helpdesk.woa/.. /DiscoveryPlugIns</td>
<td>Defines path to the discovery plugins directory. The default path is the DiscoveryPlugins directory above Helpdesk.woa. (See additional notes for WHDReportPluginDir.)</td>
</tr>
<tr>
<td>WHDDashboardPluginDir</td>
<td>&lt;path&gt;</td>
<td>/Helpdesk.woa/.. /DashboardPlugins</td>
<td>Provides path to the dashboard widget plugins directory. The default path is the DashboardPlugins directory above Helpdesk.woa. (See additional notes for WHDReportPluginDir.)</td>
</tr>
<tr>
<td>WHDEnableSQLTool</td>
<td>true</td>
<td>false</td>
<td>Prescribes whether the endpoint for querying the database is active. If true, an SQL query tool can be accessed at <a href="http://localhost:8081/helpdesk/WebObjects/Helpdesk.woa/wa/DBActions/sqlTool">http://localhost:8081/helpdesk/WebObjects/Helpdesk.woa/wa/DBActions/sqlTool</a></td>
</tr>
<tr>
<td>WHDInitSchemaOnly</td>
<td>true</td>
<td>false</td>
<td>If true, then when initializing the database, the application stops after creating the schema, before populating the database. This makes it possible to create the empty database schema, which can be possible when migrating data from another database type.</td>
</tr>
<tr>
<td>WHDDisableImapPartialFetch</td>
<td>true</td>
<td>false</td>
<td>Sets the mail.imap.partialfetch property for IMAP connections to false, which can be necessary for some mail servers that fail to return attachment data properly.</td>
</tr>
<tr>
<td><strong>ARGUMENT</strong></td>
<td><strong>VALUE</strong></td>
<td><strong>DEFAULT</strong></td>
<td><strong>DESCRIPTION</strong></td>
</tr>
<tr>
<td>---------------------------</td>
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<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>WHDLdapPasswordCacheHours</td>
<td>&lt;hours&gt;</td>
<td>168 (1 week)</td>
<td>Provides default number of hours for LDAP Connection password caching. Can be overridden in the settings for individual LDAP Connections.</td>
</tr>
<tr>
<td>WHDSkipForeignKeyCheck</td>
<td>true</td>
<td>false</td>
<td>Defines whether the schema update process should check and repair foreign-key constraints.</td>
</tr>
<tr>
<td>WHDSkipPrimaryKeyCheck</td>
<td>true</td>
<td>false</td>
<td>Prescribes whether the schema update process should check and repair primary-key constraints.</td>
</tr>
<tr>
<td>WHDDisableSessionHeartbeat</td>
<td>true</td>
<td>false</td>
<td>Determines whether the application should attempt to detect whether a ticket edit session has been abandoned by leaving the page. When enabled, the ticket editor sends “pulse” requests to Helpdesk.woa/wa/processHeartbeat according to the interval specified by WHDSecondsBetweenHeartbeat. Each heartbeat request includes the ticket ID, the ticket editing session ID (a PK into the ACTIVE_SESSION table, not to be confused with the application session ID itself), and a count that is incremented for each heartbeat, starting over at 0 whenever the editing page is refreshed. When the heartbeat request is processed, an ACTIVE_SESSION record indexed by the ticket ID and the editing session ID is updated with the current time. When the amount of time specified by WHDHeartbeatTimeoutSeconds has passed without receiving a heartbeat, the ticket editing session is considered to have been abandoned, and editing locks for the ticket are cleared. When the heartbeat count reaches WHDHeartbeatWarningCount, a warning message is logged. If the heartbeat count reaches WHDMaxHeartbeatCount, the ticket editor stops sending heartbeats, and the application stops updating the ACTIVE_SESSION table when the tickets are processed.</td>
</tr>
<tr>
<td>WHDSecondsBetweenHeartbeat</td>
<td>&lt;seconds&gt;</td>
<td>55</td>
<td>Defines the interval at which the ticket editor sends heartbeat requests to Helpdesk.woa/wa/processHeartbeat. (See WHDDisableSessionHeartbeat.)</td>
</tr>
</tbody>
</table>

When the amount of time specified by WHDHeartbeatTimeoutSeconds has passed without receiving a heartbeat, the ticket editing session is considered to have been abandoned, and editing locks for the ticket are cleared. When the heartbeat count reaches WHDHeartbeatWarningCount, a warning message is logged. If the heartbeat count reaches WHDMaxHeartbeatCount, the ticket editor stops sending heartbeats, and the application stops updating the ACTIVE_SESSION table when the tickets are processed.
<table>
<thead>
<tr>
<th><strong>ARGUMENT</strong></th>
<th><strong>VALUE</strong></th>
<th><strong>DEFAULT</strong></th>
<th><strong>DESCRIPTION</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>WHDHeartbeatTimeoutSeconds</td>
<td>&lt;seconds&gt;</td>
<td>120</td>
<td>Identifies the amount of time without receiving a heartbeat until a ticket editing session is considered to have been abandoned.</td>
</tr>
<tr>
<td>WHDHeartbeatWarningCount</td>
<td>&lt;integer&gt;</td>
<td>30</td>
<td>Prescribes the number of ticket editor heartbeats until a warning message is logged. (Used for troubleshooting.)</td>
</tr>
<tr>
<td>WHDMaxHeartbeatCount</td>
<td>&lt;integer&gt;</td>
<td>10000</td>
<td>Defines the maximum number of heartbeats that should be sent from a given ticket editing session.</td>
</tr>
<tr>
<td>WHDDatabaseUpdatePassword</td>
<td>&lt;password&gt;</td>
<td>&lt;none&gt;</td>
<td>If a password is provided, the database update process may be initiated by sending a GET request to Helpdesk.woa/wa/DBActions/performDatabaseUpdate?password=&lt;password&gt;. When a database update has been initiated through this method, subsequent requests to this URL return progress statistics.</td>
</tr>
<tr>
<td>WHDMaxDashboardWidgets</td>
<td>&lt;integer&gt;</td>
<td>-1</td>
<td>Maximum number of widgets that a given tech may configure on her dashboard. -1 = unlimited, 0 = disabled.</td>
</tr>
<tr>
<td>WHDReportingAppName</td>
<td>&lt;application name&gt;</td>
<td></td>
<td>(Hosted) If provided, the given application name is used instead of the current application name when generating bookmark-able links to specific reports. This was provided so that Macquarie University could have an instance with a large amount of memory dedicated for running reports, and have the bookmark-able URLs from the non-reporting instances point to the reporting instance.</td>
</tr>
<tr>
<td>WHDBcryptRounds</td>
<td>&lt;integer&gt;</td>
<td>10</td>
<td>Provides how many rounds of encryption to use when creating Bcrypt digests. (Eventually, password digests may be generated using the more secure Bcrypt algorithm instead of MD5, but for now, Bcrypt is used only to generate the version number hash in AppProperties_Generated.java. We can switch to Bcrypt for passwords as soon as we upgrade the Mobile app to no longer send passwords as MD5 digests. All that is required to make the switch in the application is to change the order in which digest providers are configured in MDSDigestString.java.)</td>
</tr>
<tr>
<td>ARGUMENT</td>
<td>VALUE</td>
<td>DEFAULT</td>
<td>DESCRIPTION</td>
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</tr>
<tr>
<td>WHDEstimatedActiveCustomFields</td>
<td>&lt;integer&gt;</td>
<td>2000</td>
<td>Identifies estimated number of custom fields of any entity type that are likely to be active. (&quot;Active&quot; custom fields are those that are not empty and not marked as deleted.) Used as a heuristic for optimizing the removal of inactive custom fields from the database, which is performed each time the application starts up in order to optimize the performance of custom field handling.</td>
</tr>
<tr>
<td>WHDUpdateSqlLog</td>
<td>&lt;path&gt;</td>
<td></td>
<td>If provided, SQL generated for updating the database schema is written to the specified file instead of being committed to the database. Useful for generating an update script that can be applied to the database manually.</td>
</tr>
<tr>
<td>WHDAllowAbsoluteManageSQLiteDatabase</td>
<td>true</td>
<td>false</td>
<td>If true, the Discovery Connection panel for Absolute Manage allows the user to select the Absolute Manage SQLite database instead of the MySQL database. Disabled by default because Absolute Manage says the SQLite database is subject to change and isn't a supported means of accessing discovered data.</td>
</tr>
<tr>
<td>WHDWebObjectsMonitorDeployment</td>
<td>true</td>
<td>false</td>
<td>If true, the application acts as if deployed from WebObjects Monitor regardless of whether this is the detected deployment environment. (When running in WebObjects Monitor, the application does not redirect to the HDM-web application, which runs only as a servlet, and therefore certain functionality is disabled.)</td>
</tr>
<tr>
<td>WHDDisableSnapshotRefCounting</td>
<td>true</td>
<td>false</td>
<td>If true, EOF snapshot-reference counting is disabled. This can prevent errors about EOF snapshots, but it means that all records fetched from the database are retained in memory. This is provided for troubleshooting. It is unlikely to be a viable option for production deployments because it is likely to require too much memory.</td>
</tr>
<tr>
<td>WHDEnableOutgoingMailHistory</td>
<td>true</td>
<td>false</td>
<td>Determines whether history should be maintained for email that is sent. Outgoing e-mail history can be viewed at Setup &gt; E-Mail &gt; Outgoing Mail Accounts &gt; E-Mail History. History entries include binary copies of the actual e-mail message, which can result in large amounts of database usage over time. The E-Mail History tab provides an option to clear the history.</td>
</tr>
<tr>
<td><strong>ARGUMENT</strong></td>
<td><strong>VALUE</strong></td>
<td><strong>DEFAULT</strong></td>
<td><strong>DESCRIPTION</strong></td>
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</tr>
<tr>
<td>WHDEnableScripts</td>
<td>true</td>
<td>false</td>
<td>If true, the application looks in the scripts folder for the existence of JavaScript files with predefined names that corresponding to certain callback actions. Currently, only LoginCallback.js and NewTicketUrlCallback.js are supported.</td>
</tr>
<tr>
<td>WHDDisableScriptCache</td>
<td>true</td>
<td>false</td>
<td>Whether scripts should be cached or reloaded whenever referenced. Should be true only when testing/troubleshooting.</td>
</tr>
<tr>
<td>WHDScriptLogLevel</td>
<td>&quot;TRACE&quot;</td>
<td>&quot;ERROR&quot;</td>
<td>Defines the level of detail at which script execution should be logged.</td>
</tr>
<tr>
<td>WHDScriptFolder</td>
<td><code>&lt;path&gt;</code></td>
<td><code>&lt;whd_home&gt;/conf/scripts</code></td>
<td>Folder in which to look for scripts.</td>
</tr>
<tr>
<td>WHDScriptLogFolder</td>
<td><code>&lt;path&gt;</code></td>
<td><code>&lt;whd_home&gt;/log /Helpdesk.woa/..</code></td>
<td>Folder in which script log will be written. Script log is named &quot;scripts.log,&quot; rolled over up to 5 times in 15MB files.</td>
</tr>
<tr>
<td>WHDDisableExternalAuth</td>
<td>true</td>
<td>false</td>
<td>If true, SSO is disabled regardless of selection at Setup &gt; General &gt; Authentication &gt; Authentication Method.</td>
</tr>
<tr>
<td>WHDUseAppNameForLoginUrl</td>
<td>true</td>
<td>false</td>
<td>(Hosted) If true, the URL used when generating URLs that refer back to WHD will use the application name (e.g., &quot;HostedHelpdesk&quot;) rather than simply using the value stored in PREFERENCE.SAVED_LOGIN_URL. Setting this to false allows instances that are specially configured for things like reporting (e.g., &quot;OneHelpReporting&quot;) to use the application name specified for general instances (e.g., &quot;OneHelp&quot;) when constructing links back to WHD in reports, etc.</td>
</tr>
<tr>
<td>Argument</td>
<td>Value</td>
<td>Default</td>
<td>Description</td>
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<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>WHDWebUrl</td>
<td>&lt;url&gt;</td>
<td>/whd-web</td>
<td>Base URL to the whd-web application. Specifying a full URL could be useful during development in order to redirect to a different port than the one on which the WebObjects application is being served while debugging.</td>
</tr>
<tr>
<td>WHDPrivateBaseUrl</td>
<td>&lt;url&gt;</td>
<td></td>
<td>Provides the URL to use for backend communication between helpdesk and whd-web applications. This is constructed automatically by the WHD start scripts. Typically configured as &quot;<a href="http://localhost">http://localhost</a>:&lt;port&gt;&quot; or &quot;<a href="https://localhost">https://localhost</a>:&lt;secure_port&gt;,&quot; where &lt;port&gt; and &lt;secure_port&gt; are the WHD HTTP ports configured in whd.conf.</td>
</tr>
<tr>
<td>WHDDisableGSW</td>
<td>true</td>
<td>false</td>
<td>If true, then when database connection issues are detected, the old database connection configuration panel will be presented instead of redirecting to the new Getting Started Wizard. (Can be useful during development.)</td>
</tr>
<tr>
<td>WHDhostedDbHost</td>
<td></td>
<td></td>
<td>Deprecated. No longer used. Use whd.db.host instead.</td>
</tr>
<tr>
<td>WHDhostedDbName</td>
<td></td>
<td></td>
<td>Deprecated. No longer used. Use whd.db.name instead.</td>
</tr>
<tr>
<td>WHDhostedDbUserName</td>
<td></td>
<td></td>
<td>Deprecated. No longer used. Use whd.db.username instead.</td>
</tr>
<tr>
<td>WHDhostedDbPassword</td>
<td></td>
<td></td>
<td>Deprecated. No longer used. Use whd.db.password instead.</td>
</tr>
<tr>
<td>(All properties in &lt;whd_home&gt;/conf/.whd.properties)</td>
<td></td>
<td></td>
<td>Any of the database-connection properties recorded in &lt;whd_home&gt;/conf/.whd.properties can be specified as JVM arguments. This can be useful to ensure that the application uses the correct parameters in the event that there is a failure reading the .whd.properties file.</td>
</tr>
<tr>
<td>WHDEnterpriseObjectCreationTracing</td>
<td>true</td>
<td>false</td>
<td>If enabled, MDSGenericRecord records stack traces of where objects are created, which can be used when an IllegalStateException occurs in MDSGenericRecord.willRead() -- which happens when an attempt is made to access an EO after its editing context has been disposed.</td>
</tr>
<tr>
<td>Argument</td>
<td>Value</td>
<td>Default</td>
<td>Description</td>
</tr>
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</tr>
<tr>
<td>WHDEditingContextDebugging</td>
<td>true</td>
<td>false</td>
<td>If enabled, MDSEditingContext.newEditingContext() returns instances of MDSEditingContext instead of ERXEC, which record the name of the editing context as well as the editing context itself, so that the object’s EC can be more easily identified in logging output. MDSEditingContext also records a stack trace when the editing context is disposed so that it can be logged in MDSGenericRecord.willRead() when an attempt is made to read properties of an object belonging to an editing context that has been disposed.</td>
</tr>
<tr>
<td>WHDHideTickets</td>
<td>true</td>
<td>false</td>
<td>If true, the Tickets menu option is hidden from client and tech views. (For customers who want to use the application for Devices and FAQs only.)</td>
</tr>
<tr>
<td>WHDRequireHttpApiKey</td>
<td>true</td>
<td>false</td>
<td>If true, the Helpdesk.woa/wa/createTicket direct action requires an apiKey to be provided in the request.</td>
</tr>
<tr>
<td>WHDShowLinkLabels</td>
<td>true</td>
<td>false</td>
<td>If true, the Setup menu displays label keys instead of labels, to aid in determining labels to use for generating deep links to specific setup menu options.</td>
</tr>
<tr>
<td>WHDUseOriginalCookieParser</td>
<td>true</td>
<td>false</td>
<td>If true, then the original WebObjects class for parsing cookies will be used instead of the custom class provided by WHD that corrects for cookies that fail to follow the standard cookie syntax by including unencoded commas.</td>
</tr>
<tr>
<td>WHDEmailCheckInterval</td>
<td>&lt;seconds&gt; 60 (min 15)</td>
<td>60 (min 15)</td>
<td>Deprecated. Use &quot;WHDDaemonInterval.EmailDaemon&quot; instead.</td>
</tr>
<tr>
<td>WHDCleanupInterval</td>
<td>&lt;seconds&gt; 3600 (min 3600)</td>
<td>3600 (min 3600)</td>
<td>Deprecated. Use &quot;WHDDaemonInterval.CleanupDaemon&quot; instead.</td>
</tr>
<tr>
<td>WHDMessageCloserInterval</td>
<td>&lt;seconds&gt; 300 (min 300)</td>
<td>300 (min 300)</td>
<td>Deprecated. Use &quot;WHDDaemonInterval.MessageCloserDaemon&quot; instead.</td>
</tr>
<tr>
<td>WHDDaemonMode</td>
<td>background</td>
<td>dedicated</td>
<td>none</td>
</tr>
<tr>
<td>ARGUMENT</td>
<td>VALUE</td>
<td>DEFAULT</td>
<td>DESCRIPTION</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>background:</td>
<td>Daemons will run as background processes.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>dedicated:</td>
<td>Application will ONLY run background processes; users will not be able to log in to this instance.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>none:</td>
<td>Daemons will not be run in this instance.</td>
</tr>
<tr>
<td>WHDDaemons</td>
<td>[-]&lt;list&gt;</td>
<td>All daemons</td>
<td>Provides comma-separated list of daemons to start, if WHDDaemonMode is background or dedicated. If list</td>
</tr>
<tr>
<td></td>
<td></td>
<td>enabled</td>
<td>is preceded by a minus sign, all daemons EXCEPT those in the list will be started.</td>
</tr>
<tr>
<td>WHDDaemonInterval</td>
<td>&lt;seconds&gt;</td>
<td>300 / 600</td>
<td>Defines the default daemon interval in seconds. Default is 300 seconds (5 mins) for standard deployments, 600 seconds (10 mins) for hosted</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(min 60)</td>
<td>deployments. Most daemons have a minimum interval of 60 seconds. (DelayedActionDaemon has a 20s default and 15s minimum; MessageCloserDaemon</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>has a default and minimum interval of 5 mins; CleanupDaemon has a default and minimum interval of 1 hr; and EmailDaemon has a default</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>interval of 60s and a minimum of 15s.)</td>
</tr>
<tr>
<td>WHDDaemonInterval.EmailDaemon</td>
<td>&lt;seconds&gt;</td>
<td>60 (min 15)</td>
<td>Designates the interval (in seconds) between checks for incoming ticket e-mail. Default is 60 seconds. Minimum is 15 seconds.</td>
</tr>
<tr>
<td>WHDDaemonInterval.LdapSync</td>
<td>&lt;seconds&gt;</td>
<td>300 / 600</td>
<td>Defines the interval (in seconds) between checks for whether an LDAP sync is needed. Default is 300 seconds (5 mins) for standard</td>
</tr>
<tr>
<td>Daemon</td>
<td></td>
<td>(min 60)</td>
<td>deployments, 600 seconds (10 mins) for hosted deployments. Minimum is 60 seconds.</td>
</tr>
<tr>
<td>WHDDaemonInterval.AlertDaemon</td>
<td>&lt;seconds&gt;</td>
<td>300 / 600</td>
<td>Prescribes the interval (in seconds) between checks for whether ticket alerts need to be sent. (Alerts are configured in Setup &gt; Tickets</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(min 60)</td>
<td>&gt; Priority Types.)</td>
</tr>
<tr>
<td>WHDDaemonInterval.TicketClos</td>
<td>&lt;seconds&gt;</td>
<td>300 / 600</td>
<td>Identifies the interval (in seconds) between checks for tickets that need to be auto-closed. (Auto closure is configured for status types</td>
</tr>
<tr>
<td>er Daemon</td>
<td></td>
<td>(min 60)</td>
<td>in Setup &gt; Tickets &gt; Status Types.)</td>
</tr>
<tr>
<td>ARGUMENT</td>
<td>VALUE</td>
<td>DEFAULT</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>-----------</td>
<td>---------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>WHDDaemonInterval.ClientReminder Daemon</td>
<td>&lt;seconds&gt;</td>
<td>300 / 600 (min 60)</td>
<td>Designates the interval (in seconds) between checks for tickets that are due for a reminder to be e-mailed to the client that the ticket is waiting for their reply. Reminders are configured in Setup &gt; Tickets &gt; Priority Types.</td>
</tr>
<tr>
<td>WHDDaemonInterval.ServiceExpiration Daemon</td>
<td>&lt;seconds&gt;</td>
<td>300 / 600 (min 60)</td>
<td>Defines the interval (in seconds) between checks for service time blocks that have expired. Service blocks are configured in Setup &gt; Parts &amp; Billing.</td>
</tr>
<tr>
<td>WHDDaemonInterval.ReportSchedule Daemon</td>
<td>&lt;seconds&gt;</td>
<td>300 / 600 (min 60)</td>
<td>Identifies the interval (in seconds) between checks for reports that are due to be e-mailed. Report schedules are configured at Reports &gt; Report Schedules.</td>
</tr>
<tr>
<td>WHDDaemonInterval.AssetReservation Daemon</td>
<td>&lt;seconds&gt;</td>
<td>300 / 600 (min 60)</td>
<td>Prescribes the interval (in seconds) between checks for asset reservations that should be checked out automatically, and for checked-out assets that are overdue. Reservations are configured at Assets &gt; Reservations.</td>
</tr>
<tr>
<td>WHDDaemonInterval.DelayedAction Daemon</td>
<td>&lt;seconds&gt;</td>
<td>20 (min 15)</td>
<td>Designates the interval (in seconds) between checks for e-mail that has been queued for sending in the background.</td>
</tr>
<tr>
<td>WHDDaemonInterval.ServletPulse Daemon</td>
<td>&lt;seconds&gt;</td>
<td>900 (min 60)</td>
<td>Determines the interval (in seconds) between triggering of new dummy session. Used only in Tomcat deployments. (Attempt to work around strange hangups that appear to happen only when running under Tomcat, and seem to be prevented by invoking a request that generates a new session.)</td>
</tr>
<tr>
<td>WHDDaemonInterval.ApplePushNotifications Daemon</td>
<td>&lt;seconds&gt;</td>
<td>14400 (min 60)</td>
<td>Provides the interval (in seconds) between checks for Apple devices that should no longer receive push notifications.</td>
</tr>
<tr>
<td>WHDDaemonInterval.AssetDiscovery Daemon</td>
<td>&lt;seconds&gt;</td>
<td>300 / 600 (min 60)</td>
<td>Identifies the interval (in seconds) between checks for whether an Asset Discovery Connection is due to be run.</td>
</tr>
<tr>
<td>WHDDaemonInterval.BackupDaemon</td>
<td>&lt;seconds&gt;</td>
<td>300 / 600 (min 60)</td>
<td>Designates the interval (in seconds) between checks for whether a database backup is due.</td>
</tr>
<tr>
<td>WHDDaemonInterval.GarbageCollection Daemon</td>
<td>&lt;seconds&gt;</td>
<td>300 / 600 (min 60)</td>
<td>Specifies the interval (in seconds) between Java garbage collection triggers.</td>
</tr>
<tr>
<td>ARGUMENT</td>
<td>VALUE</td>
<td>DEFAULT</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>----------</td>
<td>-------</td>
<td>---------</td>
<td>-------------</td>
</tr>
<tr>
<td>WHDDaemonInterval.CleanupDaemon</td>
<td>&lt;seconds&gt;</td>
<td>3600 (min 3600)</td>
<td>Designates the interval (in seconds) between runs of the cleanup daemon. The cleanup daemon performs various cleanup tasks such as deleting tickets with no request type; setting the DELETED field to 0 for any tickets for which the value is null; deleting single-use bulk actions that have completed; adding 2000 years to any ticket open or close dates prior to the year 100; and removing expired e-mail history entries.</td>
</tr>
<tr>
<td>WHDDaemonInterval.MessageCloserDaemon</td>
<td>&lt;seconds&gt;</td>
<td>300 (min 300)</td>
<td>Interval in seconds between checks for whether any Messages are due for closing.</td>
</tr>
<tr>
<td>WHDDaemonInterval.AssetAlertDaemon</td>
<td>&lt;seconds&gt;</td>
<td>3600 (min 60)</td>
<td>Defines the interval (in seconds) between checks for assets that have alerts due for contract expiration, warranty expiration, and lease expiration.</td>
</tr>
<tr>
<td>WHDDaemonInterval.ApprovalReminderDaemon</td>
<td>&lt;seconds&gt;</td>
<td>300 (min 60)</td>
<td>Identifies the interval (in seconds) between checks for approval requests that need reminder e-mails.</td>
</tr>
<tr>
<td>WHDDaemonInterval.SurveyReminderDaemon</td>
<td>&lt;seconds&gt;</td>
<td>300 (min 60)</td>
<td>Provides the interval (in seconds) between checks for unanswered surveys that need reminder e-mails.</td>
</tr>
<tr>
<td>WHDDaemonInterval.InventoryDaemon</td>
<td>&lt;seconds&gt;</td>
<td>300 (min 60)</td>
<td>Designates the interval (in seconds) between checks for inventories that are below the threshold for requiring alert e-mails.</td>
</tr>
<tr>
<td>WHDDaemonInterval.SupportExpirationDaemon</td>
<td>&lt;seconds&gt;</td>
<td>86400 (min 60)</td>
<td>Specifies the interval (in seconds) between support expiration checks. All admin-level techs receive expiration warning emails.</td>
</tr>
<tr>
<td>WHDPPageCacheSize</td>
<td>&lt;#pages cached&gt;</td>
<td>10 (min 2)</td>
<td>Sets the number of pages cached by the WO for backtracking, can be used for tweaking memory consumption. Use carefully; numbers 0 and 1 can cause issues.</td>
</tr>
<tr>
<td>NCENTRAL</td>
<td>true</td>
<td>false</td>
<td>Defines whether the application is running as the standard Help Desk Manager: false = Standard</td>
</tr>
<tr>
<td>ARGUMENT</td>
<td>VALUE</td>
<td>DEFAULT</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------</td>
<td>---------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Help Desk Manager</td>
<td></td>
<td></td>
<td>Help Desk Manager is the default configuration provided by the WHD installers, with an embedded Tomcat at <code>&lt;HDM_home&gt;/bin/tomcat/</code>, HDM application at <code>&lt;HDM_home&gt;/bin/webapps/</code>, configuration files at <code>&lt;HDM_home&gt;/conf/</code>, etc. This parameter is NOT provided by the start script (not provided = false).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>true = SolarWinds MSP[[[Undefined variable Variables.Help Desk Manager]]]</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>The configuration provided by the Help Desk Manager installers, with an embedded Tomcat at <code>&lt;HDM_home&gt;/bin/tomcat/</code>, HDM application at <code>&lt;whd_home&gt;/bin/webapps/</code>, configuration files at <code>&lt;whd_home&gt;/conf/</code>, etc. This parameter is provided automatically by the HDM start script.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>This argument should not be changed on the already installed Help Desk Manager. It is provided by the installer. The only exception is the HDM running in custom tomcat (single / multi instance), then the argument has to be added manually along with other arguments.</td>
</tr>
<tr>
<td>WHDLogMaxSize</td>
<td>Size in MB</td>
<td>15</td>
<td>Presents size of helpdesk.*log files.</td>
</tr>
<tr>
<td>WHDLogFileCount</td>
<td>&lt;# of files&gt;</td>
<td>5</td>
<td>Provides count of helpdesk.*log files generated by log4j.</td>
</tr>
</tbody>
</table>

**Connect an iPhone to a standard or hosted installation**

You can connect an Apple iPhone to a standard or hosted Help Desk Manager installation.

**Connect to a standard installation**

1. Navigate to Settings > Server.
2. Make sure the Configuration option is set to Default.
3. Input the DNS name of the server on which Help Desk Manager is installed.
4. Set the appropriate port.
   - Port 8081 is the default port number, unless it has been changed in the `whd.conf` file or Server Options.
5. Turn on SSL only if it has been enabled in the `whd.conf` file or Server Options. If SSL is enabled, make sure the port option matches the SSL port.

**Connect to a hosted installation**

1. Navigate to Settings > Server.
2. Make sure the Configuration option is set to Hosted.
3. In the Account # field, specify your Subscriber ID number.
   - You can find your ID in the Hosted Help Desk Manager application at Setup > General > Options > Custom Login URL. Your ID is the number at the end of the login URL.
4. Set the Host to:
   - `webhelpdesk.com`
5. Set the SSL option to:
   - `On`
6. Return to Settings and add the Tech Username and Password to connect with and set up Notifications.
7. Click Done to authenticate the iPhone configured in the Help Desk Manager server.