

Setup

Settings for the case registration form

☒ Require **phone number for user** during registration

☐ Require **affects** to be chosen at case registration

☐ Require **category** to be chosen at case registration

☐ Require **priority** to be chosen at case registration

☐ Require **object** to be chosen at case registration

☐ Require **object** to be chosen when a case is solved

☒ Use **SLA** in case window

☒ Use **Affects** in case window

☐ Send warning when responsible agent changes often

☐ Exclude external users when searching

UPDATE

Template tree structure

SET / CHANGE

Set to
Selected template catalog: Helpdesk

More Service Portal Settings

SETTINGS BY DEPARTMENT (Appearance, information text and feedback function)

SETTINGS BY CUSTOMER (New case, filter & FAQ)

SHARED SETTINGS (Menu Links)

FORMS

Roles

Problem Manager

John Smith

▼

UPDATE

Service Manager

John Smith

▼

UPDATE

Knowledge Manager

John Smith

▼

UPDATE

System map responsible

John Smith

▼

UPDATE

Change Manager

John Smith

▼

UPDATE

Change Manager

John Smith

▼

UPDATE

Project Administrator

John Smith

▼

UPDATE

Default *values upon* registration

Checking for submitting of time spent.	Time must be submitted in the case before it can be closed.
Use phone number control	If a user is missing a telephone number in More Service, it must be filled in before user can proceed to registration of a case from user Web.
Use SLA	Service level must be filled out, either automatically based on service level agreement or manually before the case can be registered.
Use billing	Use this if you want to enable the "Invoice" field in case. When checking the "Billing" field in a case, the case will appear in reports that are billing.
Category control	Category is required for registration of case.
Object type control	Objects are mandatory for registration of a case.
Check that object is selected when solving a case.	The object is mandatory at the conclusion of the case.
Possible to change password on user web	Provides a button to change passwords from userweb .

Use "Impact"	The "Impact" field appears in the Incident - , Service -, and Access cases.
Use SLA fields	The deadlines, SL Type and consumption Fields appear in Incident -, Service -, Access -and standard change cases.
Exclude External users when searching	User groups marked as "External" do not appear in user search when registering or updating Incident -, Service - / Problem - / Change cases, and also in Project.

Template structure

Choose which part of the folder structure in the «Maintenance» module that will be made available to the user.

Setup of user web pages

Select a user group, and then choose whether the business' cases / user's cases / FAQ should be shown to users on user web.

Change banner section on user web: Here you can add an image file that will appear as a banner on user web.

Links in user web: Here you can add links that will appear at the bottom of the main menu of user Web.

Vacations and holidays

Vacations and holidays submitted here are taken into account by the calendar and auto escalation of cases.

Setup of link to information file about user's client

If software is used that provides extended information about the clients, this information may appear in the cases under "User client information" and "File reference".

Roles

Problem Manager	The role gets email when new problem is registered.
Change Manager	The role gets email when New Change is registered.
Servicedesk Manager	The person receives an email when a case breaks an SLA. If a case is reopened and agent have been deleted, the case will be assigned to the Servicedesk Manager. When assigned agent opens a case more than 10 times, a warning is sent to the Servicedesk Manager.
Release Coordinator	The role can choose change window for release and confirm date of production release in "Change" -> "Production"
Knowledge base Responsible	If this field is blank, all agents can publish new FAQs. If a person is set to fill this role, this would be the only person who can publish new FAQs, and is getting email when new FAQ articles are written.
Project Administrator	Can see all, and process all, projects. Can also delete a project.