

# **Polar Help Desk 4.1**

## **User's Guide**

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## **Polar Help Desk User's Guide Overview**

This guide provides information for all users accessing Polar Help Desk either to register an incident, provide a resolution for an incident or view reports to get an overview of the incident management process.

# Getting Started with Polar Help Desk

## Navigating through Polar Help Desk

### Login Screen

Any Polar Help Desk user logs into Polar Help Desk through the login screen. On the login screen user must enter his username and password. Initially you can log into Polar Help Desk with these accounts (usernames):

- admin (password: admin)
- support (password: support)
- user (password: user)

### Automatic Login Page

Polar Help Desk has automatic login page. The page named AutomaticLogin.aspx can be found in the root of Polar Help Desk main folder.

You can call it using the following syntax:

[http://localhost/helpdesk/AutomaticLogin.aspx?Username=YOUR\\_USERNAME\\_HERE&Password=YOUR\\_PASSWORD\\_HERE](http://localhost/helpdesk/AutomaticLogin.aspx?Username=YOUR_USERNAME_HERE&Password=YOUR_PASSWORD_HERE)

### Bottom Menu

Polar Help Desk consists of four different desktops:

- Help Desk Desktop
- Knowledge Base Desktop
- Reports Desktop
- Administration Desktop

You can navigate through desktops using bottom menu. Not every user has access to all the desktops. It depends on permissions he has on each desktop. To find out more about user permissions, see Polar Help Desk Administration Guide.

### Main Menu

Through main menu, which is positioned on the top of each desktop, you can create new items of all kinds, log out or use the available tools.

### Left Menu

On each desktop there is a different left menu. As the user navigates through the left menu the Content Panel will change.

### Content Panel

The content panel, in which you can enter data and manage Polar Help Desk, is positioned in the central part of every desktop. Content panel changes as you choose different tabs in the left menu.

### Toolbar

In most cases there is a toolbar in the content panel. Toolbar contains the actions over the items displayed in the content panel, for example: users, incidents, knowledge base items etc.

## **Polar Help Desk Desktops**

### **Help Desk Desktop**

Help Desk is a common place for communication between service users and support representatives.

For support representatives, Help Desk Desktop is a place where the incidents are being analyzed and resolved. Support representatives modify registered incidents in order to resolve them. This process can include a further communication with the service user in order to ask them some additional questions.

### **Knowledge Base Desktop**

Depending on their role (a set of permissions) the users have can either read or add new articles. Every user is allowed to browse all the approved articles and to search them.

### **Report Desktop**

Report Desktop is a place where a number of reports can be viewed. The reports give an instant picture of the incident management process state.

### **Administration Desktop**

Administration Desktop is a place where the Polar Help Desk administrator can manage all the elements of Polar Help Desk. For more information on Administration Desktop see Polar Help Desk Administration Guide.

# Product Concepts

## ITIL Overview

ITIL (IT Infrastructure Library) created by CCTA (Central Computer and Telecommunications Agency) defines a set of principles to help organizations assure optimal IT service management. These principles are actually best-practice methodologies and therefore based on experiences of commercial organizations where the efficient support management is essential. This makes ITIL the most influential framework for creating successful IT service management for both small and large organizations.

Incident Management, one of the elements of service management, concentrates on restoring normal service operation and minimizing the impact on business operations. This is done by resolving incidents as soon as possible and noticing the service user to assure his satisfaction. Every incident must be detected and recorded.

One of the main principles of service management is to ensure a single place for support personnel to provide support for their service users. This place is usually called the Help Desk. The service user comes to the Help Desk to report an incident. Incident can be accepted in different ways, some of which are listed below:

- Support personnel receive a phone call (or some other notification) and register incidents on Help Desk.
- Service user sends an e-mail which in turn generates a new incident record.
- Service user, using his own username and password, logs into the Help Desk and registers an incident.
- Automatic incident logging etc.

When the incident is registered the support attempts to resolve it and therefore to restore normal service operation. When the service operation is closed and the service user is satisfied, incident can be closed.

When providing IT support, a need for software tools soon arises. Depending on the size of the organization and the complexity of processes in the organization, the complexity of software tools varies. Therefore, to provide optimal support in a large IT organization a more sophisticated toolset may be required.

## Polar Help Desk Features

Based on ITIL methodologies, Polar Help Desk implements the following features to optimize IT service management:

### Help Desk

Help Desk is a desktop where service users can contact support personnel for their issue to be resolved. When registered, this issue is considered to be an incident. In Polar Help Desk you can register an incident in two ways:

- Support personnel receives a phone call or other notification, registers an incident and provides an initial support, if possible. If the service user is not already registered in Polar Help Desk, a service support personnel representative must enter his data first, creating a new account for the user.

- Service user reports an incident through Polar Help Desk using his own username and password. In this case, the user must already have an account registered.

For more about users and their accounts see Polar Help Desk Administration Guide.

## **Incident Management**

Incident Management is the process comprising all activities through the life-cycle of an incident, which are the following:

- Registering an incident through Help Desk
- Defining a category of the incident (classification). Categories that can be assigned to the incident must already be defined in Polar Help Desk, for example: software, hardware etc.
- Providing initial support. An instant resolution of the incident by the support representative accepting the incident can lead to the satisfaction of the customer or the service user. For this reason a help desk personnel accepting incidents is considered a first-line support in incident management process.
- Investigation of the incident. Support representatives work on the incident in order to resolve it. This action may require a number of steps, for example asking a customer an additional question, searching a knowledge base, reassignment to the other support representative who has greater knowledge on the issue etc.
- Resolution and recovery. A resolution includes a recovery of the service which is now available for the customer to use without difficulties.
- Incident closure. When the customer or service user is satisfied and the service functions properly, the incident can be closed. Support representative who closes the incident must provide a closure classification. Closure classifications that can be used are defined on Administration Desktop.
- Monitoring incidents. To monitor incident management and its efficiency it may be required to perform these activities:
  - Monitor status and progress of the resolution of the incident
  - Escalate the priority of the incidents, automatically or manually. (For more information see Polar Help Desk Administration Guide.)
  - Monitor the status of the incidents that have high priorities
  - Keep the service user informed of the status of the incident by sending e-mail notifications.

Incident management activities can be performed on both Help Desk Desktop and Help Desk Desktop.

## **Staff Management**

Polar Help Desk enables an organization to perform staff management, as well as registering all service users and customers. Organizing the support personnel in groups and assigning them roles is a starting point of defining processes in a service support department.

## **Polar Help Desk Roles**

### **General on Help Desk Roles**

A role in help desk defines a set of rights (or permissions) to view items and to perform certain actions. The permission set represents the responsibilities of the Help Desk user.

The role of Polar Help Desk Administrator differs from other roles in such way that it can not be deleted or changed.

Polar Help Desk Administrator can create any number of roles and give them any set of permissions. Nevertheless, there are roles that any ITIL implementing service support department should have. These roles are minimally the following (keep in mind that names of the roles bellow are not as important as the permissions set, required for a certain tasks to be performed):

### **Service User Role**

Service User is role for common service users who register incidents through web interface. All such users should be in this role. The role should have permissions on users personal incidents, approved knowledge items etc.

### **Support Representative Role**

Support representative is a user who is responsible for analyzing and resolving incidents. There are different categories of support representatives:

- First-line support representative can see all incidents and all the users, accepts new incidents by phone and provides initial support. These support representatives typically perform tasks on Help Desk Desktop and therefore should have a full control on that desktop.
- Second-line support representative can see all or just his group's incidents on the Help Desk Desktop, depending on the permissions he has. He also has to have permissions for updating incidents in order to resolve them.

Thus, at least two different roles should be created to give required permission for the users listed above.

### **Help Desk Manager Role**

Help Desk manager is a user whose responsibility is to drive the overall efficiency of the incident management process. The role defined for such user should have permissions on Help Desk, particularly on the Reports Desktop and Help Desk Desktop. Reports give an instant picture of the incident management state. Help Desk manager has a responsibility to optimize and improve incident management processes.

### **Help Desk Administrator**

Polar Help Desk Administrator performs a set of tasks which ensure normal functioning of the Polar Help Desk and implements processes into Polar Help Desk. To learn more about Polar Help Desk Administrator's tasks and the settings this user can modify read Polar Help Desk Administration Guide.

# Help Desk Desktop

## Incident Management

### Overview

On the Help Desk Desktop support representatives can view all registered incident. While viewing and updating incidents, you can group them in different ways. Incidents are grouped under these tabs:

- Home
- Incidents by Status
- Incidents by Category
- Incidents by Priority
- Incidents by Group
- Incidents by Origin
- Incidents by Closure
- Incidents by Service
- My Incidents

Incident Management Home divides all the incidents into two groups: Active and Inactive. If the processes in the support department are well implemented, support representatives only need to monitor the Active incidents. They can also filter the incidents by groups, if they are members of more than one group.

Statuses of incidents are:

- New
- In Progress
- Waiting
- Resolved
- Completed
- Closed

By clicking the header of each column you can sort the incidents. For example, if you click on "Title" column the incidents will be sorted by their title in ascending order. If you click twice, the incidents will be sorted by their title in descending order.

### Incident Templates

The main purpose of the Help Desk Desktop is to provide a place for registering new incidents. Support personnel registers new incidents by opening incident forms from incident templates. Each support representative has permissions on certain templates. If the support representative has no permission for certain user, he can not open an incident using that template.

Every incident is opened by using a template. Incident templates have a set of predefined fields which are entered in the new incident form.

If the user has access to only one template (and therefore he has nothing to choose) the incident is automatically opened from that template when he clicks "New Incident".

However, the support personnel can change the fields in the incident form on which they got permissions. Sometimes, all fields will not be defined in the chosen template so the support representative will have to fill the missing required fields.

### Accepting New Incident

You can open a new incident by clicking “New Incident” button. You have to also choose a template you want to open the incident from.

### **Registering Incident Details**

When you click “New Incident” button, “New Incident” form is displayed.

In General tab of the form, fill in incident data. These incident fields are required:

- Incident Title
- Service User
- Status
- Service
- Priority
- Assignment to a Group

These incident fields are optional:

- Incident Category
- Origin
- Closure Classification
- Assignment to Person

These fields are dependent on other fields:

- Business Unit – depends on the Service User. You can filter Service Users before you search them by choosing particular Business Unit form the combo box.
- Service Level – depends on the Business Unit (and therefore the Service User) and the Service. The service level is defined in the SLA which connects a Business Unit and a particular Service. If the SLA is not defined for the chosen combination, the default level of service is engaged. The default service should be set to lowest possible. For more information read Polar Help Desk Administration Guide.

### **Updating Incidents**

Most of the incidents updating is performed on the Help Desk Desktop. However, while providing initial support, support representatives registering incident can also perform incident resolution and recovery if the have the corresponding permissions to perform such actions.

In order to view or modify an incident’s data fields, click on the particular incident. A dialog box will be opened in which you can change the data. For more information see sections “Accepting New Incident” and “Registering Incident Details”.

### **Deleting Incidents**

If you want to delete an incident, check the check box in the list and click “Delete”. All checked incidents will be permanently deleted.

## **User Management**

In the Users tab on Help Desk Desktop, a support representative who has permissions to see users can perform user management. User management on Help Desk Desktop is required in order for the first-line support representative to find or register new users when accepting phone calls and opening new incident. Every incident has to have a service user field defined.

If an incident is opened for a registered user, the support personnel will find that particular user when opening an incident. If the user is not yet registered, support personnel must first register the user, in other words, create a new user account.

## **Work Order Management**

On the Help Desk Desktop you can also administer work orders. Work order is an authorization allowing performing specified actions (amount of work). The work that has to be done is described in the Description filed. Work orders use the same priority values as incidents.

Statuses of work orders are:

- New
- To Be Approved
- Open
- Ready
- Closed

Work order can optionally be related to an incident, and an incident can be related to a number of work orders. Work order has a Deadline field which determines the work should be finished.

## **E-mail Management**

On the Help Desk Desktop support staff has access to the E-mail waiting list. On the E-mail tab on the Help Desk Desktop you can do the following actions:

- see E-mail preview by clicking particular E-mail
- publish E-mail as incident by double clicking particular E-mail
- choose service user for the new incident
- create new user for the incident using the data from the received E-mail

## Report Desktop

On the Report Desktop the Help Desk manager, or other user who has permission to see Reports Desktop, can have an overview of the incident management process by viewing any existing report. Reports are divided into groups, according to the issue that is being covered by a particular report. Those groups are the following:

- Service Availability
- Help Desk Performance
- Support Staff Performance
- Planning Performance

To see a particular report, just click the report and the content will be displayed in the new browser window.

If you want to change the time period, change the date range on the calendar. The default date range is the current week.

## **Administration Desktop**

Polar Help Desk Administrator can perform administration tasks on Administration Desktop. The set of tasks performed by the Polar Help Desk Administrator is covered in detail in Polar Help Desk Administration Guide.