SPICEW/RKS

Spiceworks
Help Desk Guide
Your handy help desk... helper!

INTRODUCTION

So, you've decided to use the Spiceworks Help Desk to simplify your day. Or, maybe you're just looking to get a bit more info before you take the plunge. Either way, you probably have a few questions. Let's tackle your brain busters and get started on configuring your Help Desk!

"What benefits do I get from using the Spiceworks Help Desk?"

Great question. Imagine you're in charge of helping 50 end users with various IT-related tasks and requests.

Now imagine trying to manage all 50 of those users via email and sticky-notes (you probably know those pains...). Good news: Spiceworks comes to the rescue with a Help Desk tool that provides a single place for you to manage all your tasks via tickets.

With the Spiceworks Help Desk you can:
- Keep your users informed on tickets they've submitted.
- Identify common issues that are popping up on a consistent basis.
- Document your work for reference in the future.
- Divide and conquer by assigning tickets to other techs within your organization.

Okay, but how exactly does the Help Desk work?

The Spiceworks Help Desk is part of the Spiceworks Desktop app. In short, you'll install the desktop app on a dedicated machine, do some configuration, and then have your users submit tickets. You'll then work those tickets within the app. Spiceworks will handle sending out notifications via email and all that good stuff. In addition, you'll be able to run reports related to tickets within the app.

How are tickets submitted? Three ways:
- Via email from an end user
- Via the user portal from an end user
- Via the Help Desk UI from an admin

Once tickets have been created, you can access them within the Help Desk. To make this task easier, you can use ticket views to filter tickets by chosen criteria. This is especially helpful in cases where you need to see tickets assigned to certain techs.

SpiceTip

The Spiceworks Help Desk is also available as a hosted service! Check out https://community.spiceworks.com/help-desk-cloud-edition for more info
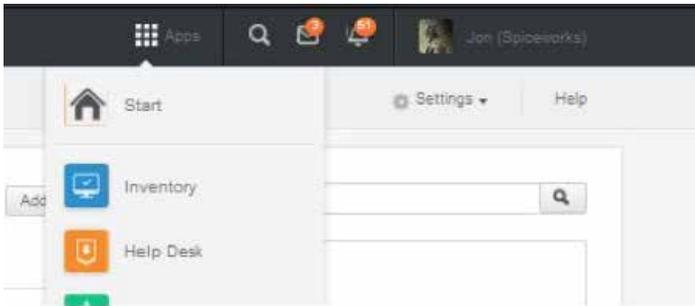
NAVIGATING THE HELP DESK

Before we dive into configuration, let's take a quick tour around your Help Desk.

First, log into the Spiceworks Desktop app by heading over to **http://[servername]/login** (where server name is the Spiceworks server's hostname).
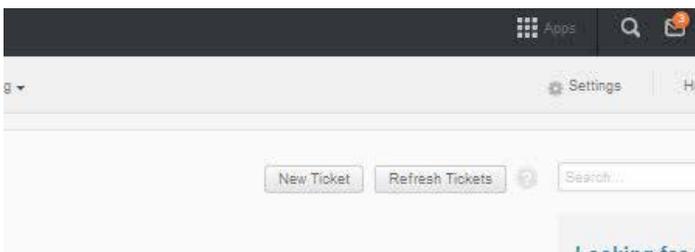
After you've logged in click on **Apps > Help Desk**.
Welcome to the Spiceworks Help Desk! If you're going to be working help tickets, this is where you'll be spending a ton of your time.
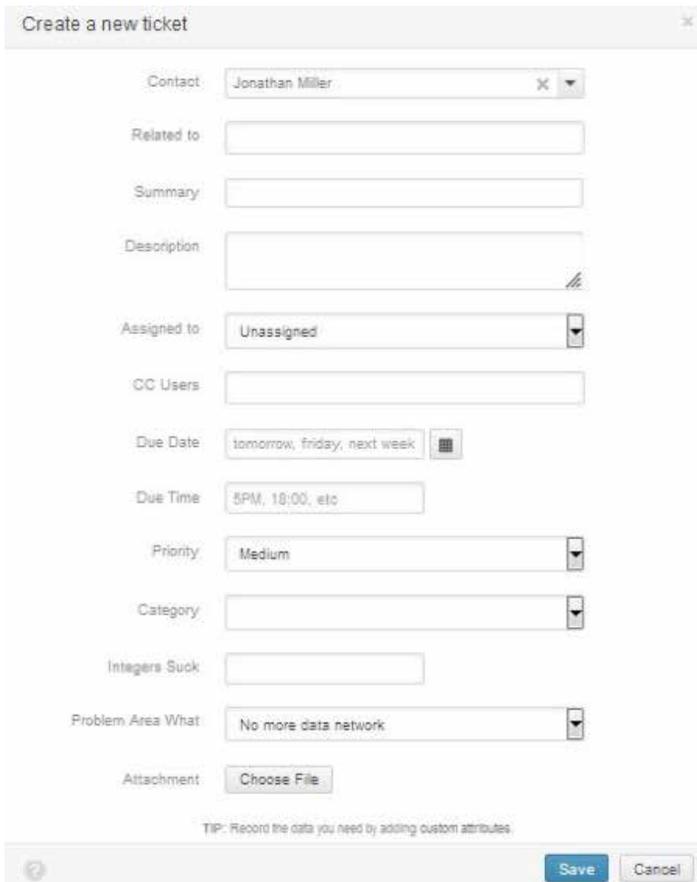

Let's quickly run through the life cycle of a ticket in order to see the various parts of your Help Desk.

First, create a new ticket by clicking the **"New Ticket"** button.

NAVIGATING THE HELP DESK (CONT.)

This will bring up the **"New Ticket"** window where you'll be able to enter all of the details needed. For example, you'll be able to set the ticket contact/creator, provide a summary, set a priority, etc.
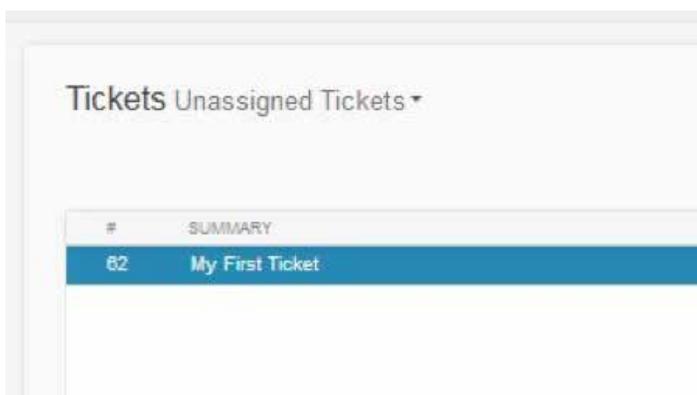

Once the ticket is created, it'll be displayed within the Help Desk.
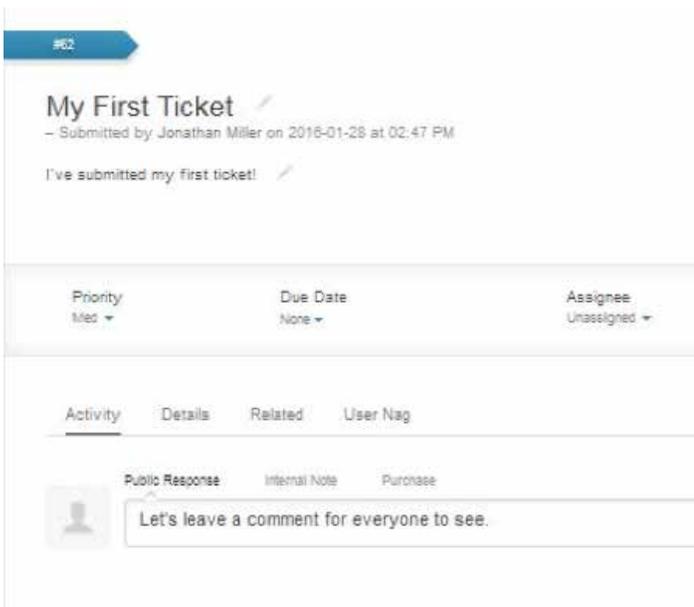
NAVIGATING THE HELP DESK (CONT.)

With the ticket displayed in the Help Desk, you'll be able edit all sorts of info.

For example, you can change the priority, set a due date, choose an assignee to work the ticket, and more!

On the Activity tab, you'll be able to add comments for everyone to see as well as notes for admins only.


From the Details tab, you can edit information on the assignee, creator, and CC'd users along with ticket history info and additional details such as custom attributes.

The Related tab contains info about devices related to the ticket that are currently tracked in the Spiceworks Inventory.

NAVIGATING THE HELP DESK (CONT.)

It's also possible to accept tickets, share tickets with folks in the Spiceworks Community, or take additional actions directly from the ticket.
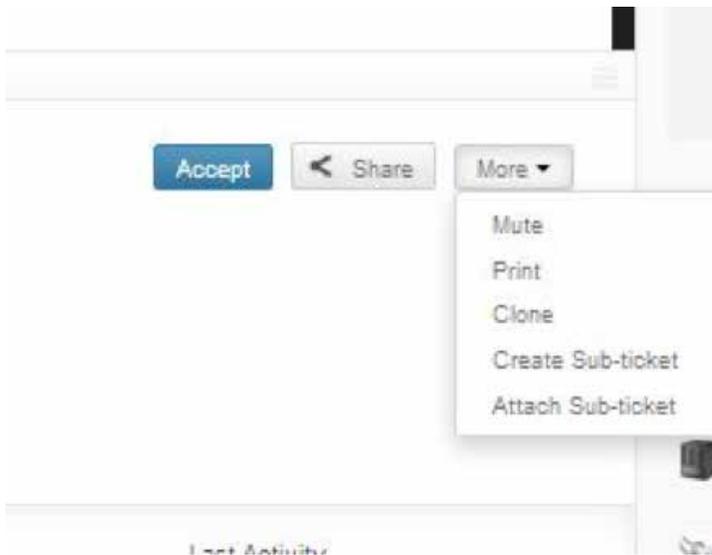
Muting a ticket will prevent any notifications on that ticket.

Choosing Print will let you print the ticket in case you need to view details while you're away from all of your various screens.

Cloning the ticket will create a new ticket with all of the details entered when the original ticket was created.

Creating a sub-ticket ties a new ticket to the ticket you're currently viewing. This is great if you have several tasks related to the same ticket that'll be completed by different people.

Attaching a sub-ticket allows for attaching an already existing ticket as a sub-ticket. This prevents the need to create a new ticket if you already have a ticket that should be a sub-ticket.

CONFIGURATION

As you may have guessed, tickets are the heart of the Help Desk. Like we mentioned earlier, there are a few ways that a ticket can be created: via email, as an admin in the Help Desk, and as an end user at the User Portal. The most common method, though, is likely email. In order to create tickets via email, we'll need to configure some email settings.

EMAIL

Email setup within Spiceworks isn't complicated, but there can be a few tricks depending on what mail service you're using.

First, create a new mailbox. If you're using your own mail server, create the mailbox there. If you're using some other service, like Gmail, create the account there. Just be sure it's a dedicated mailbox; every message in the inbox will be pulled in as a new ticket. That includes the note from Aunt Sue about bringing your camera to the next family gathering. Bless your heart, Aunt Sue.

Spiceworks will also need to send and receive messages to pull tickets and create outgoing notifications.

To send and receive emails from within your Help Desk you'll need to configure Spiceworks to use your email servers. Spiceworks needs incoming and outgoing email servers.
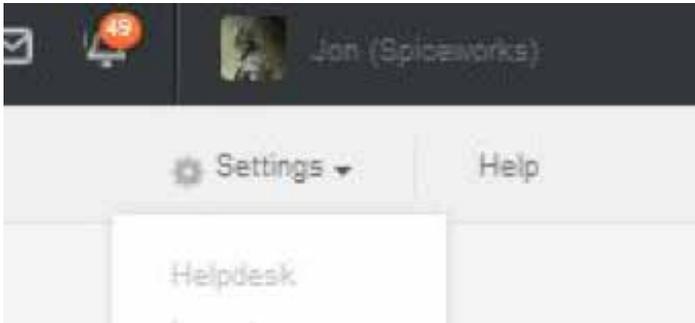
The following protocols are supported:

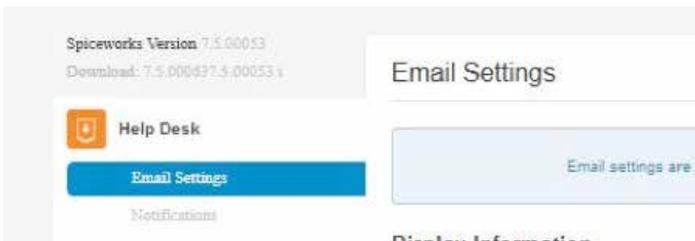**Incoming**: POP. IMAP, and MS Exchange (2003, 2007, and 2010)
Outgoing: SMTP and MS Exchange (2003, 2007, 2010)

CONFIGURATION (CONT.)

To configure your email settings within Spiceworks, head over to **Settings > Help Desk**.

Then, you'll need to choose "Email Settings."

OUTGOING EMAIL

You'll need to configure your outgoing email settings in order to send users comments on tickets. If you're not sure what settings to use, check your mail server's, or provider's, documentation.

Here's a run-down on the outgoing settings within Spiceworks:

Protocol: This is the protocol that is used to talk to your mail server for outgoing messages. Spiceworks supports SMTP and Exchange.

Server: This is the name of your email server, for example: mail.yourcompany.com

Port: This is the port number that your mail server uses for outgoing mail. SMTP typically uses port 25, but your mail server may differ.

Authentication: If your email server requires authentication, check the "Requires Authentication" checkbox and enter the login and password. Most of the time, you'll need this checked.

CONFIGURATION (CONT.)

INCOMING EMAIL

Just as you needed outgoing email settings in order for Spiceworks to send emails, you'll need to configure the incoming settings so Spiceworks can pull in emails and create tickets.

Here's a run-down of the incoming side of things:

Protocol: This is the protocol that's used for your mail server for incoming messages. Spiceworks supports POP, IMAP and Exchange.

Server: This is the name of your email server, for example: mail.yourcompany.com

Port: This is the port number that your mail server uses for incoming mail.

SSL: Some mail servers use SSL. If your mail server does, you'll need to check this box (otherwise leave it blank).

Username: This is the username for the mailbox.

Password: This is the associated password for the mailbox.

EXCHANGE-SPECIFIC SETTINGS

As we mentioned, Spiceworks supports Microsoft Exchange by using OWA (Outlook Web Access) with Exchange (2003, 2007 and 2010). Using Exchange is a little different than using POP/IMAP or SMTP. So, you'll need to tweak the settings a bit.

Here's the run-down on what you'll need to do for Exchange:

Protocol: If you want to use Exchange, select it as the protocol.

Server: This is your Exchange server URL. This is likely one of the following:
- https://mail.yourcompany.com
- https://mail.yourcompany.com/owa
- http://192.168.1.1/exchange

SpiceTip

We support both basic and FBA (Forms-Based Authentication) with Exchange. Spiceworks will automatically detect this for you.

Username: This is the username for the mailbox. Please note that this may be the full email address helpdesk@yourcompany.com or domainname\username or just helpdesk, depending on your configuration. If you're not sure about this bit, use the same format you use when logging in with OWA.

Password: This is the password for your mailbox.

CONFIGURATION (CONT.)

If you're having issues with either Gmail, Exchange, or Office365 take a look at the troubleshooting links in the following article:

https://community.spiceworks.com/help/Configuring_Email_Settings

Once you've saved your email settings, shoot over an email to the account you just created and flip over to the Help Desk. After a few minutes, you'll see a new ticket. That's all it takes to start getting tickets via email!

EMAIL NOTIFICATIONS

The Spiceworks Help Desk allows admins and end-users to receive email notifications related to their tickets. Notifications can be sent for a variety of reasons. For example, admins can receive a notification when a new ticket is created by an end user. Or you may want an end user to receive a notification whenever an admin leaves a comment on a ticket they've submitted.

Notifications are controlled by two different settings pages. First, we'll need to head over to **Settings > Help Desk > Notifications**.
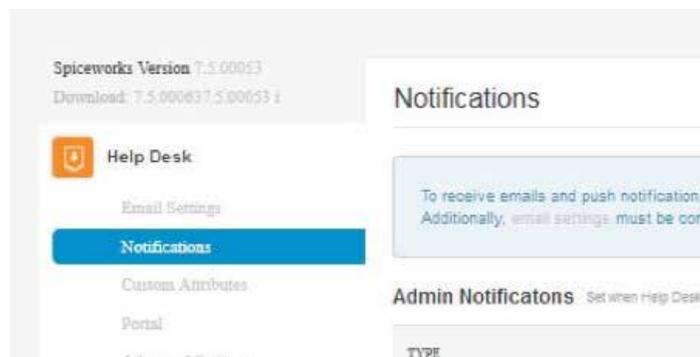
From this page, it's possible to configure various admin and end user email notifications. To get a better understanding of the functionality provided on this page, check out the Help Desk Notifications chart at the end of this document.

When a notification is enabled, you'll see a green toggle switch as in the screenshot to the right.

CONFIGURATION (CONT.)

It's important to note the app doesn't notify admins of activity taken by other admins. So, for example, if admin 1 makes a comment on one of his or her tickets, admin 2 won't receive that notification even if the "comments made on ticket" notification is enabled. This is true of actions taken on your own tickets as well; you won't get notifications on actions you took on a ticket.

Why? This prevents "spamming" by ensuring an admin doesn't receive a notification about every single ticket in an install. For example, let's say you have 20 tickets assigned to you and your teammate has 50 assigned to them. You'll probably just want to get notifications for your 20 tickets and not all 70 tickets within the Help Desk.

There's one way to get around this behavior, though. If you have the option enabled for "CC'd Admin or Tech," then you can CC an admin or tech in order for them to receive a notification on another admin's activity. This is handy if you want to receive notifications on a particular admin's tickets. For example, you might want to keep tabs on the newest team member to make sure things are going smoothly. Newbies, amirite?

Once you've got those configured the way you want, send an email to your test Help Desk address from an address other than your Spiceworks admin email or the Help Desk mailbox you just created. This will let you see how a notification looks upon ticket creation.

Why did we specify using a different email address than your Spiceworks admin email? Like we mentioned earlier, admins won't receive notifications on actions they take. If you submit the ticket with your admin address, you won't get any notifications; you'll only get notifications if you submit the ticket as an end user. There may be some times when you want to customize the notification layout. For example, maybe you want to add a blurb about not responding to a closed ticket but you only want that to appear when the ticket is closed, or maybe you just want to change the look and feel of the notification. If that sounds like something you'd like to do, check out this article: https://community.spiceworks.com/help/Ticket_Notifier_Template

SpiceTip

Want a custom notification layout but feel a little daunted by the task? The Community has some pre-built templates submitted by other Spiceworks users. You can grab those here: https://community.spiceworks.com/scripts/category/15

Okay, now we can create tickets and receive notifications on those tickets. What about automation? Is it possible to take actions automatically when a new ticket comes in? With ticket rules in place, yes!

CONFIGURATION (CONT.)

TICKET RULES

Often, it's helpful to automate an action on a new Help Desk ticket. For example, an admin may want to automatically assign a ticket based on one or more criteria. This is where ticket rules come into play.

It's possible to create ticket rules via the "My Ticket Rules" built-in plugin. Let's create a simple ticket rule that will assign any incoming ticket to you.

First, head over to **Settings > Manage Apps.** Then, find the **"My Ticket Rules"** app. If the app is disabled, go ahead and enable it now and click the edit link that appears when you hover over the app listing.
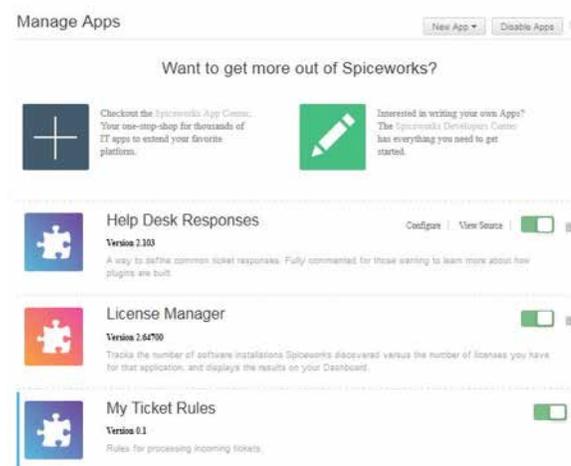
Now, go ahead and create a new rule by clicking the **"Add Rule"** button. Make the rule look for a **"Summary"** under rules. Then enter a single period for the regex value. This will look for any ticket summary. Finally, issue an assign command and assign it to your user.

Once you've saved your new rule, Spiceworks will take any ticket that has a summary/subject and assign it to you automatically. Don't want all of the tickets going to you? Just delete the rule and you'll be good.

There are many different ticket rules that can help automate the ticketing process for you. But what about filtering tickets within the app? Maybe you want to see tickets assigned to a particular tech or want to only see tickets that have a high priority rating. That's where ticket views come in.

SpiceTip
Using www.rubular.com is a great way to figure out more complex regex expressions.

CONFIGURATION (CONT.)

TICKET VIEWS

Imagine you've just set up your Help Desk. You log in and start looking through tickets. At first, it's not bad because you only have a handful of tickets. As time goes on, though, it gets hard to manage the tickets. You can't find that ticket you were about to work among all of the other tickets.

That's why Spiceworks has ticket views. By default, the app ships with a handful of views that will likely be useful. However, it's hard for developers to know exactly what you'll need to see. So, they give users the ability to create their own views. Let's create one now.

First, head over to **Settings > Manage Apps** again. Then, look for the **"My Ticket Views"** app. If it's currently disabled, enable it now and click on the edit link that appears when you hover over the app listing.

Now, let's create a view containing tickets that were assigned to you when they were closed. To do that, create a new view by clicking the **"Add View"** button and match **"status: on "closed"** and **"assigned to"** on your name.

Of course views can have more complicated criteria than this. Play around with it a bit and see if you can come up with any views that will help you throughout your day.

What if you don't want certain emails coming through? Is it possible to block a message from coming into the Help Desk? Yes! You can configure "ignore email" rules for this.

Okay, so far we've configured the Help Desk to:
- Receive emails
- Send ticket notifications
- Automate the ticketing process using ticket rules and views

Hopefully, this article helped you get started with your Help Desk. Still scratching your head? Don't stress! The Spiceworks Community (where millions of IT pros talk shop) is standing by to help. Just post a question and you'll get an answer lightning fast. You can also shoot an email to support@spiceworks.com.

Want to dive in deeper?
Check out these resources for more info:

https://community.spiceworks.com/help/Tickets_Anywhere

https://community.spiceworks.com/help/Spiceworks_Mobile_Apps