



Enterprise Enhancements

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Documentation for Simplisys Service Desk Enterprise Enhancements

Version 5.1 of the Simplisys Service Desk includes changes to the Creation and use of email templates and additional fine grained permissions in Incident edit and Classify.

These changes are designed to further improve the Enterprise capabilities of the Service Desk.

The new Group specific email templated allow you to tailor email templates for specific groups. This allows different departments or internal support groups to have specific email templates.

Group Specific Email Templates

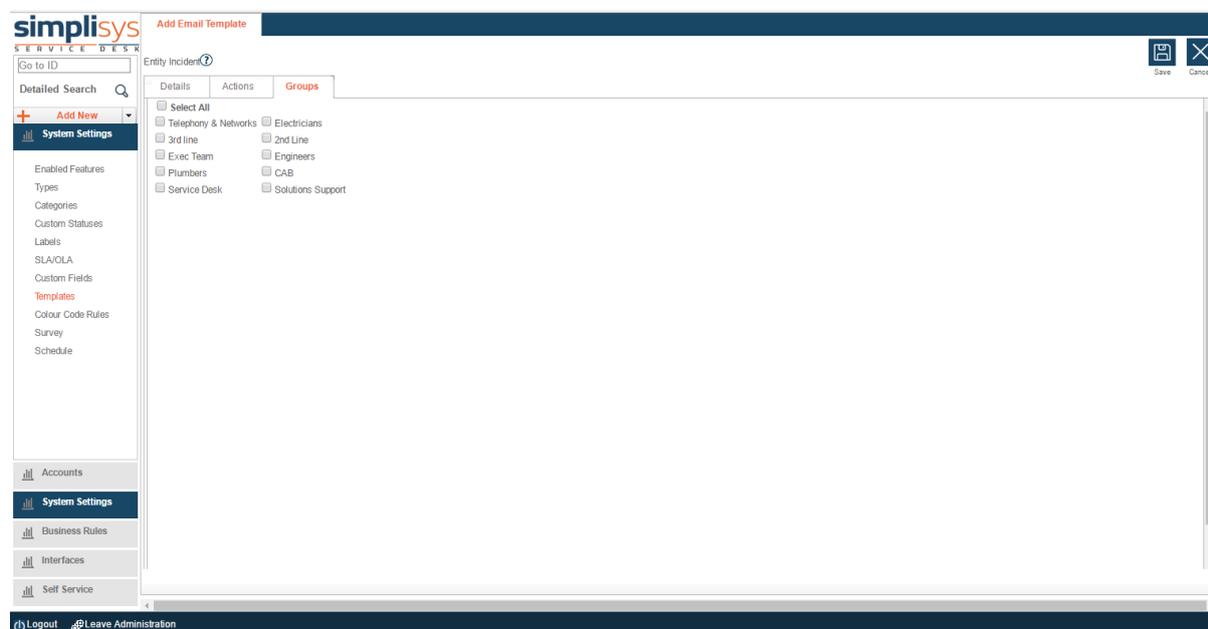
Group specific email templates are ordinary templates that have been linked to one or more groups. This feature allow you to set up different email templates that are available for use in calls assigned to different groups within the system.

Not only does this allow you to tailor the emails that are sent from calls assigned to these groups but to also define which email address the email is sent from.

For example, a group set up to manage 'HR' calls for example could be sent from the HR_Support@ email address while a facilities ticket could generate emails that are sent from the Facilities_Support@ email address.

The linking of email templates to one or more groups is done within the template definition by clicking on the 'Groups' Tab.

By default, new email templates are automatically linked to all available groups and to save a template it must be linked to at least one group.



Group Specific Default Email templates

In addition to making specific email templates available to only limited groups it is possible to make an email template, that is available to a group, the default template to use for that group for a given action.

For example, the HR group could have a different default template for the add update action that the Finance group, even though they may have the same templates available to them.

You can set up the group specific default email template to use from the 'Default Email Templates' Tab.

Entity Name	Action Name	Group	Default Template
Problem	ResolveAction	All	Problem Quick Email
Task	AddUpdateAction	All	Update Task Action
Incident	3rdPartyLogAction	All	3rd line incident updated
Incident	3rdPartyLogAction	Electricians	3rd line incident updated
Incident	AutoIncomingEmailReplyAction	All	Auto Reply
Incident	AddUpdateAction	All	Classify Action
Incident	AddUpdateAction	Electricians	Classify Action
Incident	SaveAction	All	Add New Incident
Incident	ResolveAction	All	Resolve Action

Simply select All Groups from the Group drop down to make that the base default template for that action.

Details

Select Record Class: Incident

Group: All Groups

Select Action: All Groups

Select Template: 2nd Line

This template will then be used as the default for that action when no group specific default has been set up.

To override this base default template for a given group and action simply select the default template to use and set the group to which that applies from the Group dropdown and action from the Select Action dropdown.

Details

Select Record Class	Incident
Group	Electricians
Select Action	AddUpdateAction
Select Template	Classify Action

Using Group Specific Email Templates

When sending an email from within an incident the system will allow the user to select email templates that have been assigned to the group the call is currently assigned to and the action being done.

For example where an 'Add Update' is being performed on an incident in the 3rd line group the template assigned to that group and action '3rd line Incident updated' in this case is displayed in the selection list.

The screenshot shows a window titled "Add Update" with the following fields and controls:

- Action By: steve p
- Action Date\Time: 04.11.2016 12:02
- Change Status:
- Private:
- Effort: 0 HH 10 MM
- First Response:
- Send Email:
- Email Template: A dropdown menu is open, showing options: "Classify Action", "3rd line incident updated", "Add Update Facilities", and "Classify Action".
- Review Email:
- Notes: A large empty text area.

Buttons at the bottom: Save, Cancel, Create New, Display Detail.

If that template is additionally set as the default for that group and action, as below

Entity Name	Action Name	Group	Default Template
Problem	ResolveAction		Problem Quick Email
Task	AddUpdateAction		Update Task Action
Incident	AddUpdateAction	3rd line	3rd line incident updated
Incident	3rdPartyLogAction		3rd line incident updated
Incident	AutoIncomingEmailReplyAction		Auto Reply
Incident	SaveAction		Add New Incident
Incident	ResolveAction		Resolve Action

it will automatically be selected as the default template to use.

Action By:
 Action Date\Time: 04.11.2016 12:09
 Change Status:
 Private:
 Effort: HH MM
 First Response:
 Send Email:
 Email Template:
 Review Email:
 Notes:

Restricting changes to Location and Organisation

In normal operation, a user can amend the organisation and location an incident is linked to when classifying a call. However it maybe that this ability needs to be restricted.

A system setting is available, by calling the Simplisys support team, that will disable access to those fields in the classify or add new actions for users that are not admins and do not have Edit permission.

In these cases the fields are display only with no ability for the user to change them.

Add New

Add Incidents

Quick Incident

Details	Properties	Custom Fields	Solutions
Contact Details			
Contact	<input type="text" value="Peter Demo"/>	    	
Department	<input type="text" value="Warehouse"/>	 	
Location	<input type="text" value="N100"/>	  	
Phone	<input type="text" value="01275 240512"/>		
E-mail	<input type="text" value="peter@demo.com"/>		
Group	<input type="text" value="Electricians"/>		
Owner	<input type="text" value="Ronny"/>		

Classify

Edit Incidents

ID 11367

Quick Incident

Details	Properties	Custom Fields	Solutions
Contact Details			
Contact	<input type="text" value="Charlie Windsor"/>	  	
Department	<input type="text" value="Simplisys Ltd"/>	 	
Location	<input type="text" value="M101"/>		
Phone	<input type="text" value="01275 240500"/>		
E-mail	<input type="text" value="charlie@windsor.com"/>		
Group	<input type="text" value="Electricians"/>		
Owner	<input type="text" value="Ronny"/>		