

# **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.







# Creating Group Specific Email Templates

When a new template is created, it will be automatically linked to all the available groups.

If you wish to restrict the template's availability to only certain groups simply check the boxes next to the groups required. In this case for example the template will only be available for calls that are in the '3<sup>rd</sup> Line' Group.

Add Email Template							
Entity Incident	)						
Details	Actions		Groups				
Select All							
Telephony	& Networks		Electricians				
Interpretation of the second secon		2nd Line					
Exec Tean	1	Engineers					
Plumbers		CAB					
Service De	esk	Solutions Support					

You must select at least one group to be able to save the template.

To modify a template that is currently available to be used for incidents in a specific group to be available for all groups you should select 'Select All' from the groups tab.

;	Add Email 1	Template			
č	Entity Incident	)			_
	Details	Actions		Groups	
	<ul> <li>Select All</li> <li>Telephony</li> <li>3rd line</li> <li>Exec Tean</li> <li>Plumbers</li> <li>Service D</li> </ul>	& Networks n esk	<b>Y</b> <b>Y</b> <b>Y</b> <b>Y</b>	Electricians 2nd Line Engineers CAB Solutions Supp	port





#### 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.

simplisvs	Email	Templates	Default Email Templates	System Settings	Survey Templates	Workflow Template				
Go to ID									+	Édit
Detailed Search Q	Group	All	¥							- 1
+ Add New ▼ Jil System Settings		Entity Name	Action Name		Group		Default Template			-1
		Problem	ResolveAction				Problem Quick Email			
Enabled Features		Task	AddUpdateAction				Update Task Action			- 1
Types		Incident	3rdPartyLogAction				3rd line incident updated			
Custom Statuses		Incident	3rdPartyLogAction		Electricians		3rd line incident updated			- 1
Labels		Incident	AutoIncomingEmailF	leplyAction			Auto Reply			
SLA/OLA		Incident	AddUpdateAction				Classify Action			- 1
Custom Fields		Incident	AddUpdateAction		Electricians		Classify Action			
Templates Colour Code Rules		Incident	SaveAction				Add New Incident			- 1
Survey Schoolde		Incident	ResolveAction				Resolve Action			
III Business Rules		1 N N	Page size: 10					Q itz	ame in 1 na	2005
			1 496 355. 10					5 10	mani i pa	903 -
III Sen Service										

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



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.

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 3<sup>rd</sup> line group the template assigned to that group and action '3<sup>rd</sup> line Incident updated' in this case is displayed in the selection list.

S Add Update		
S Add Update Action By Action Date\Time Change Status Private Effort First Response Send Email Email Template Review Email Notes	steve p         04.11.2016 12:02         0       HH         10       MM         ✓         Classify Action       ✓         3rd line incident updated         Add Update Facilities         Classify Action	T T
Save Cancel Cre	ate New Display Detail	/





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simplisvs	Email	Templates	Default Email Templates	System Settings	Survey Templates	Workflow Template	
Go to ID	č						
Detailed Search Q	Group	All	•				
Add New		Entity Name	Action Name		Group		Default Template
		Problem	ResolveAction				Problem Quick Email
Enabled Features		Task	AddUpdateAction				Update Task Action
Types		Incident	AddUpdateAction		3rd line		3rd line incident updated
Categories		Incident	3rdPartyLogAction				3rd line incident updated
Labels		Incident	AutoIncomingEmail	ReplyAction			Auto Reply
SLA/OLA		Incident	SaveAction				Add New Incident
Custom Fields		Incident	ResolveAction				Resolve Action
Templates							
Colour Code Rules							
Survey							

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

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

S Add	l Update		
Action Action Chang Privat Effort	By Date\Time e Status e	steve p           04.11.2016 12:09           0           0           HH           10	T
Send I Email Revie	Email Template v Email	Ø βrd line incident updated ▼	
Notes			ABC

Schedule

### 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 Incident	ts		
Quick Incident		•	
Details	Properties	Custom Fields	Solutions
	Contact I	Details	
Contact	Peter De	emo	() ? 🔥 VIP
Department	Wareho	use	00
Location	N100		
Phone	01275 2	40512	
E-mail	peter@d	lemo.com	
Group	Electricia	ans	<b>•</b>
Owner	Ronny		<b>~</b>

#### Classify

Edit Incident	S			
ID I1367 Quick Incident		•		
Details	Properties	Custom Fields	Solutions	~~~
	Contact I	Details		·
Contact	Charlie	Windsor	()	0
Department	Simplis	ys Ltd	@∆	
Location	M101		VIP	
Phone	01275 2	40500		
E-mail	charlie@	)windsor.com		
Group	Electricia	ans	•	
Ownor	Ronny		•	



