DeskDirector

MANAGEMENT AND CONFIGURATION MANUAL

Table of Contents

Overview

Welcome to DeskDirector, this document will outline everything you need to know about how to manage and configure DeskDirector for your clients and outline the various features we have built in.

There are two sections to this document;

1. **The Administration Console**
   This section details the configuration around the web based Admin portal
2. **DeskDirector Feature configuration**
   This section explains some of the specific features of DeskDirector and how they work

SYSTEM REQUIREMENTS

Before we get started we thought we should highlight the system requirements for deploying the DeskDirector client.

The main requirement is that the PC being deployed to has Micrsoft.net 3.5 installed. This was distributed with Windows 7 or Windows Server 2008 R2 and later operating systems. Equally it is commonly installed on Windows XP machines and is a common requirement for RMM (Remote Monitoring and Management) software such as LabTech.

Hardware Requirements:

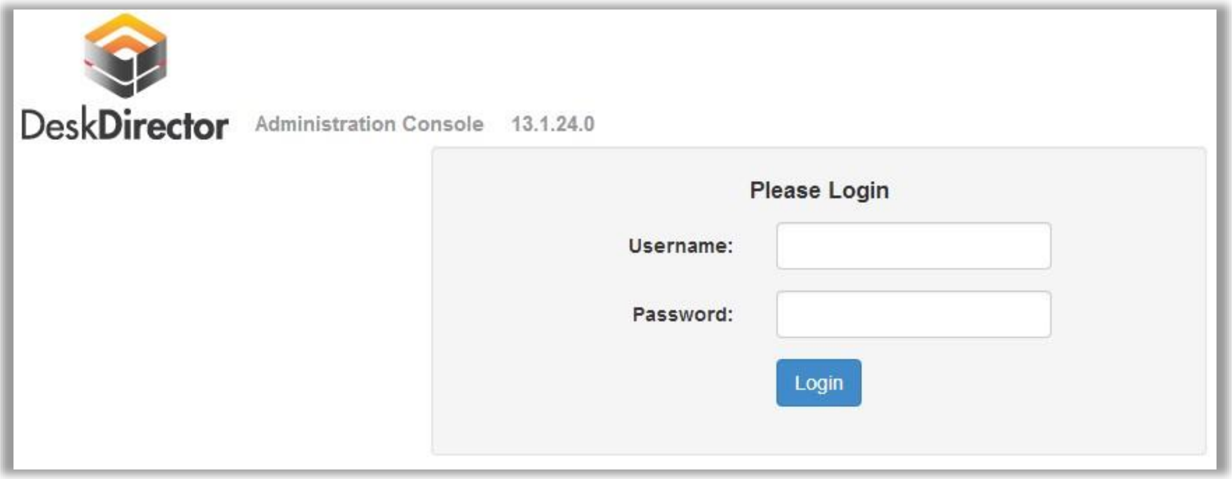
- 1 GHz or faster processor
- 512 MB of RAM
- 850 MB of available hard disk space (x86)
- 2 GB hard drive (x64)

The hardware requirements are a guide only, but you should expect DeskDirector to install and work on all but the oldest of computers.

The Administration Console

By now we will have set everything up for you, you will now have the opportunity to make any changes to password, accounts, status's etc.

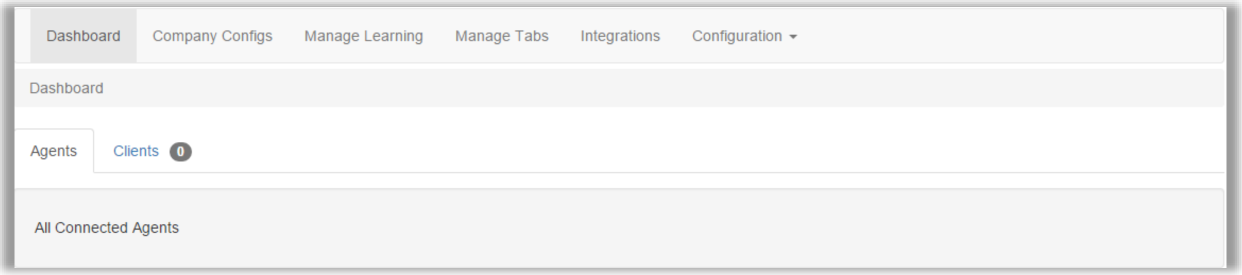
The URL for the administration console will usually be your companyname.deskdirector.com. If you would like it to be something in particular, please let us know and we can change this at any time. URL: https://company.deskdirector.com/admin



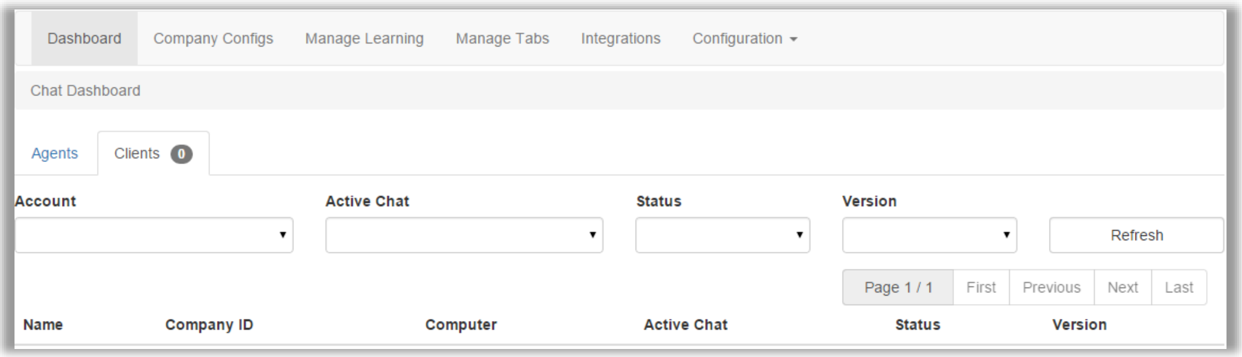
Once you have logged in successfully using the credentials we have provided, you will be presented with 6 Tabs, we will go through each one now.

CHAT DASHBOARD

The chat dashboard allows you as a DeskDirector admin to be able to view who is connected to the agent console to receive chats, their username, online status, version and if they have any active chats or not.



You are also able to view all your clients that are connected and using DeskDirector. You can filter by Company, Active Chats, Status, and Version number.



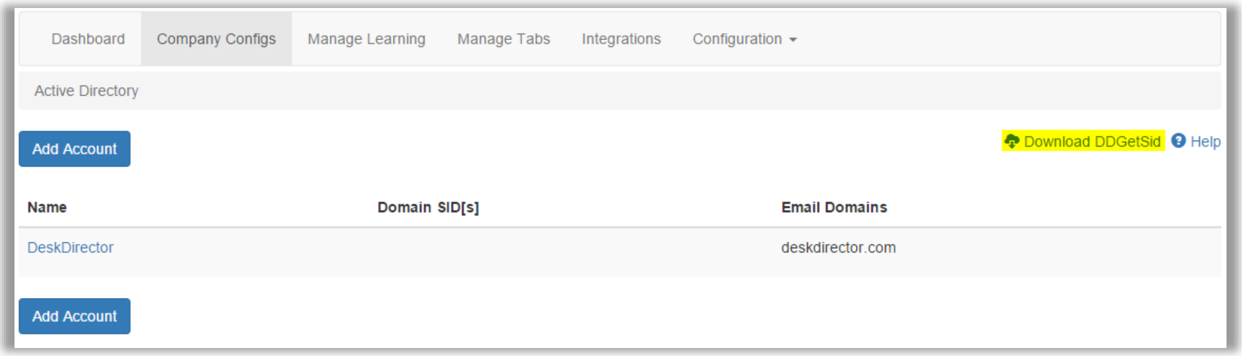
COMPANY CONFIGS

Your clients have three ways to log into DeskDirector, the first method is the automatic login using Active Directory, the second is by using the customer's email and DeskDirector password, and the third is to use our passwordless feature.

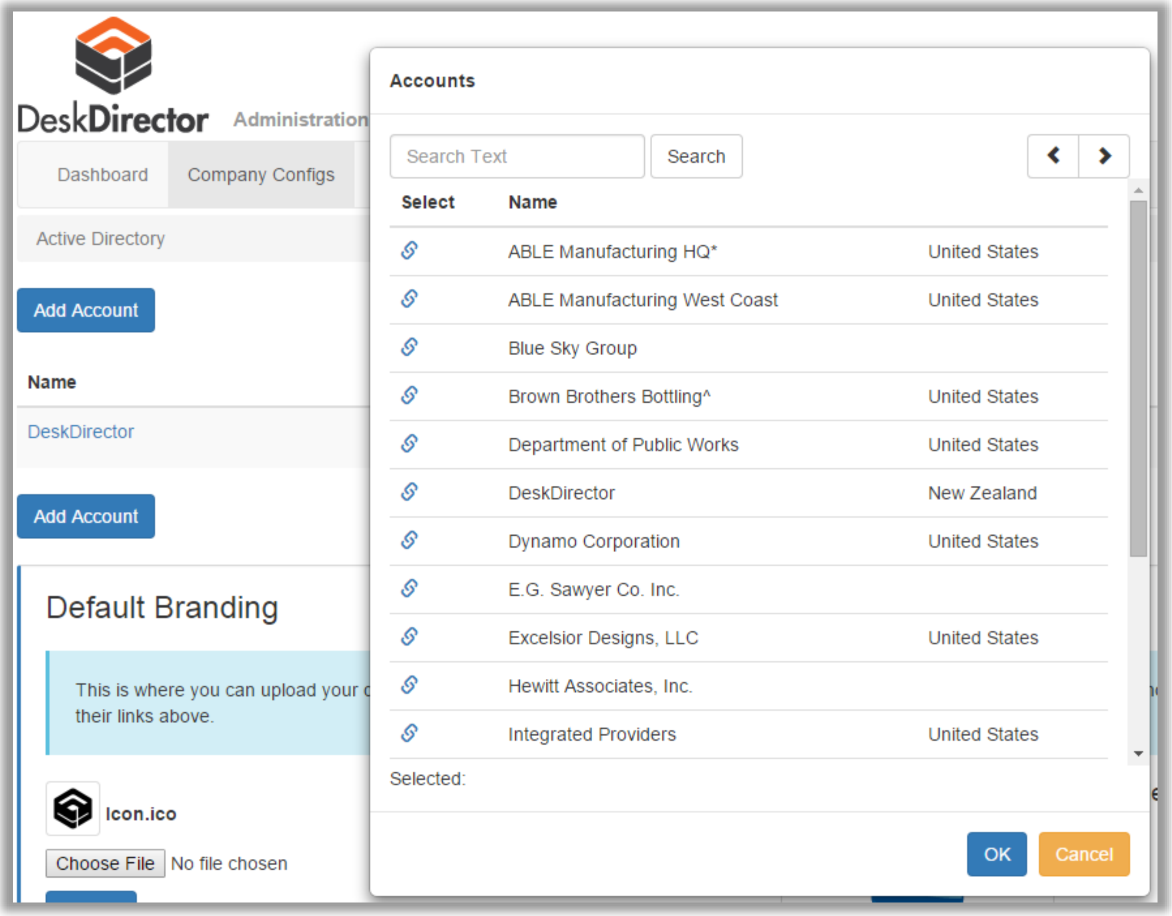
DeskDirector's Active Directory automatic login functionality works by using three components:

1. The Domain SID
2. Autotask CompanyID
3. Email address in the user's AD Profile

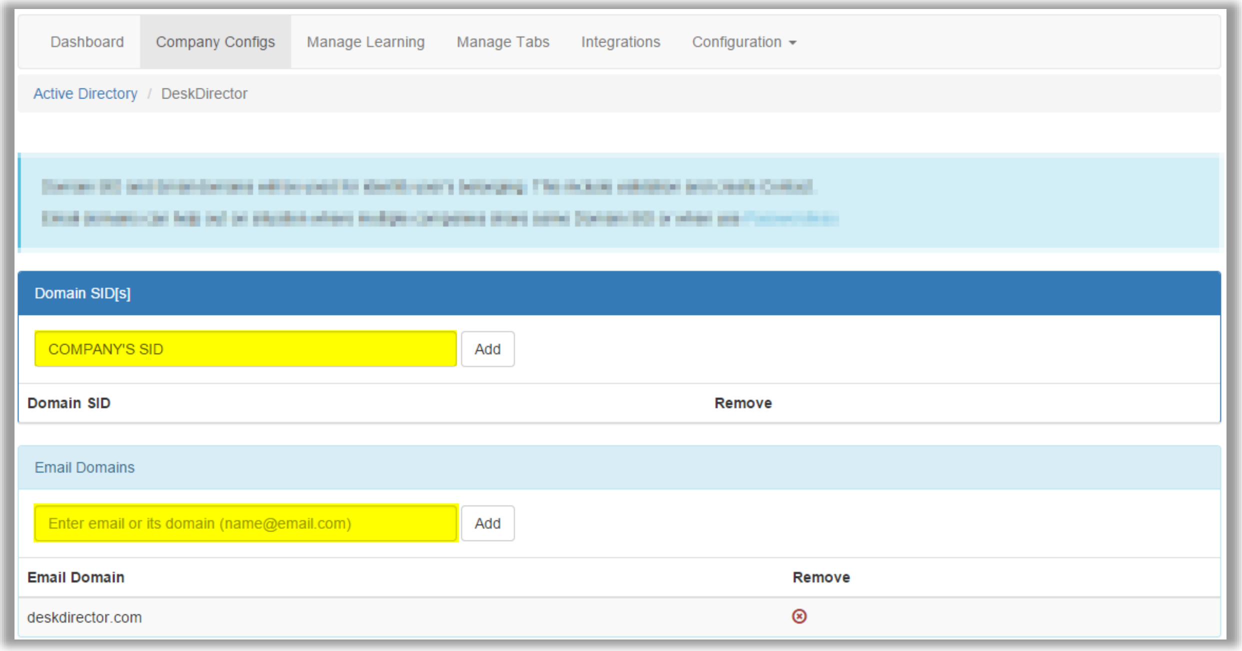
To obtain the Domain SID and user's email domain, we have included a tool which you can download and run. From this page download the DDGetSid.exe and run it on any machine on the client's domain. It could be an end user's computer or a server, as long as it's on the domain.



After you have the Domain SID, hit the "add account" button and add the company you want to roll DeskDirector out to.



Copy the domain SID and email domain and paste as shown below.



For more information on the DDGetSid tool and information on how to diagnose automatic login problems, please head over to the following link: DDGetSID Tool

If you have a RMM tool and are able to run scripts remotely, you could also run the following DS query from a domain controller to get the Domain SID:

```
dsquery * -filter (name=%computername%) -attr ObjectSID -l
```

Things to note:

- If your customer does not have a domain controller, they will be forced to login using their portal email and DeskDirector password or use passwordless. Once a user has logged in, this will store an authentication cookie on that user's computer which will allow them to login automatically the next time and will not prompt for that password. This same behaviour will happen if your client works from out of the office, they will be presented with the same portal login/passwordless prompt.

This authentication cookie is stored in the registry under:

HKEY_CURRENT_USER > Software > DeskDirector > AuthCookie

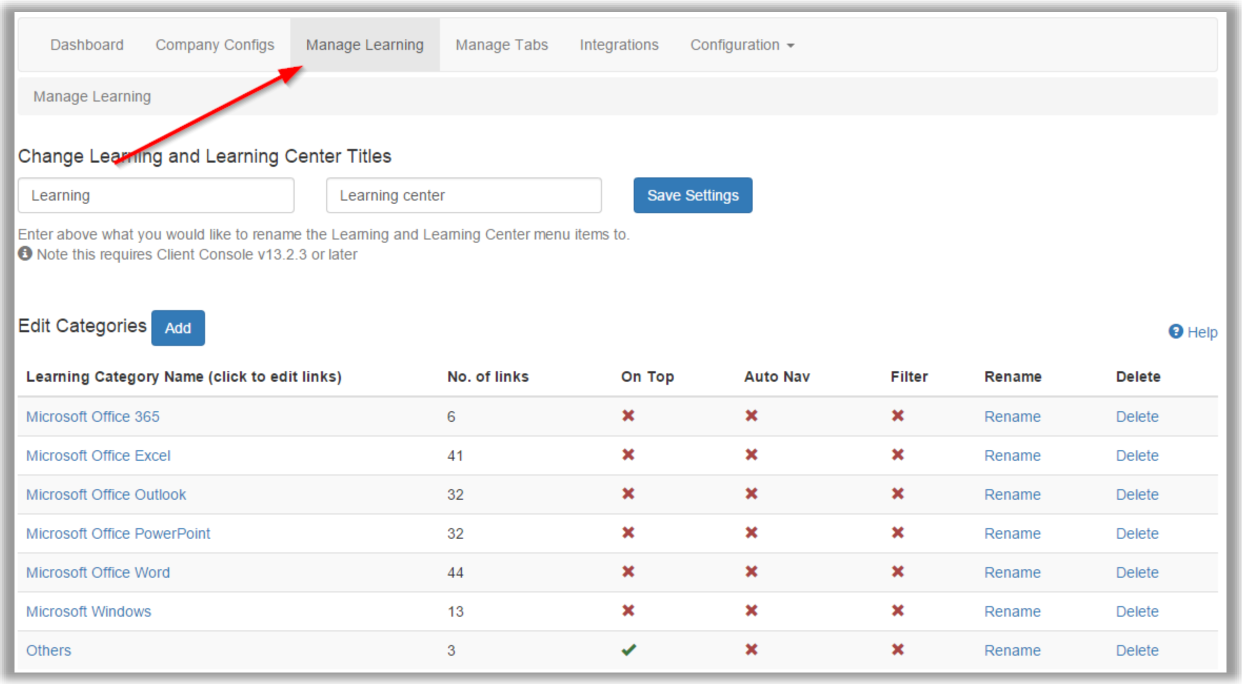
This can be deleted to allow a user to re-authenticate. You can also bring up the portal prompt yourself by holding down "Shift" while opening the client, this will allow you to login as your customer with their portal credentials for testing purposes.

- DeskDirector authenticates users based on their email address, therefore the email address under the user's AD account must be present and also match the same email address that is under the contact in Autotask. For example, AD account for John Smith is john.smith@company.com. His Autotask contact must also be john.smith@company.com

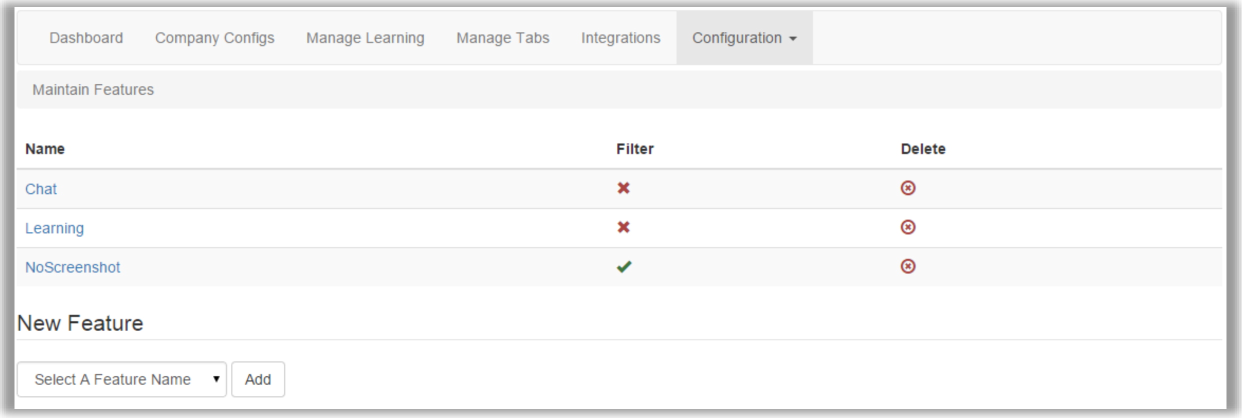
- If this is different, a new contact will be created in Autotask with the user's AD email address and this will not have any ticket history etc. Similarly, there should only be one contact in Autotask with that email address.

MANAGE LEARNING

DeskDirector has a Learning Centre built in that allows you to post training and help documents, videos, PDF's, and more. As long as the linked material is available externally from a browser, the DeskDirector client will be able to embed this within the Learning Centre window.

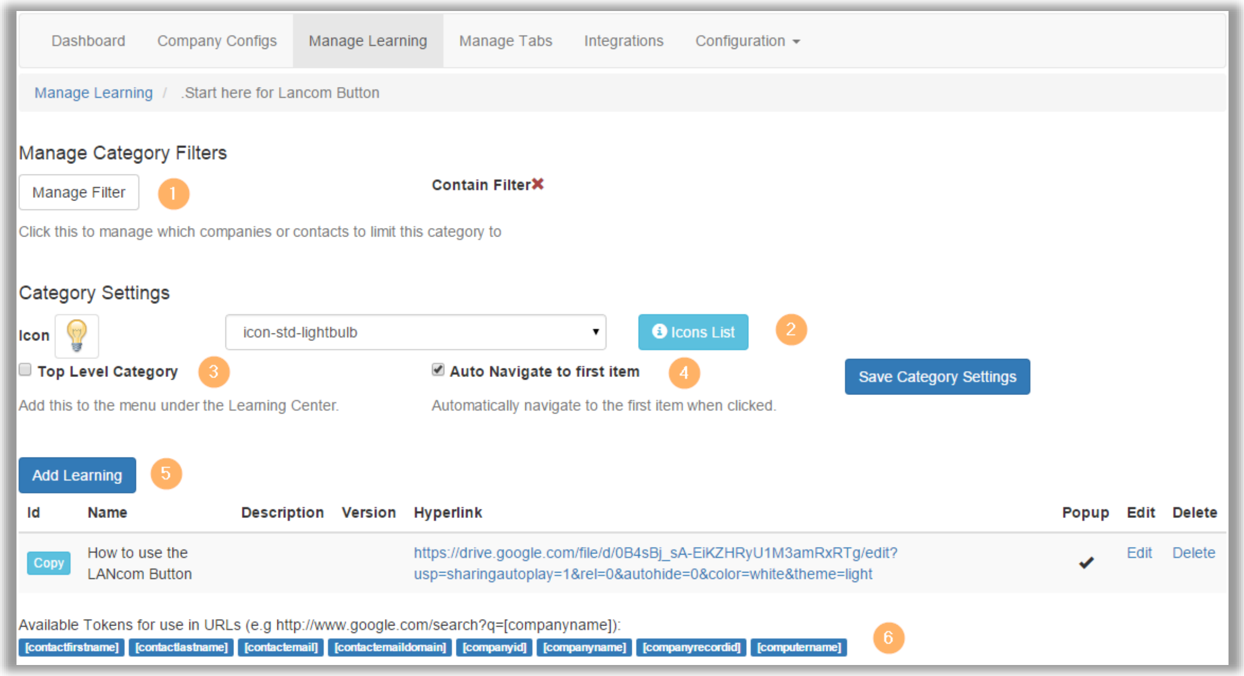


For your client to view the Learning Centre, you must enable the Learning feature on the **Configuration** > [Maintain Features](#) page.



To add a learning category, simply hit "Add" and enter the name for the category. Once this has been done, click on the category name itself (in the "manage learning" tab) to add any number of links to view from within DeskDirector.

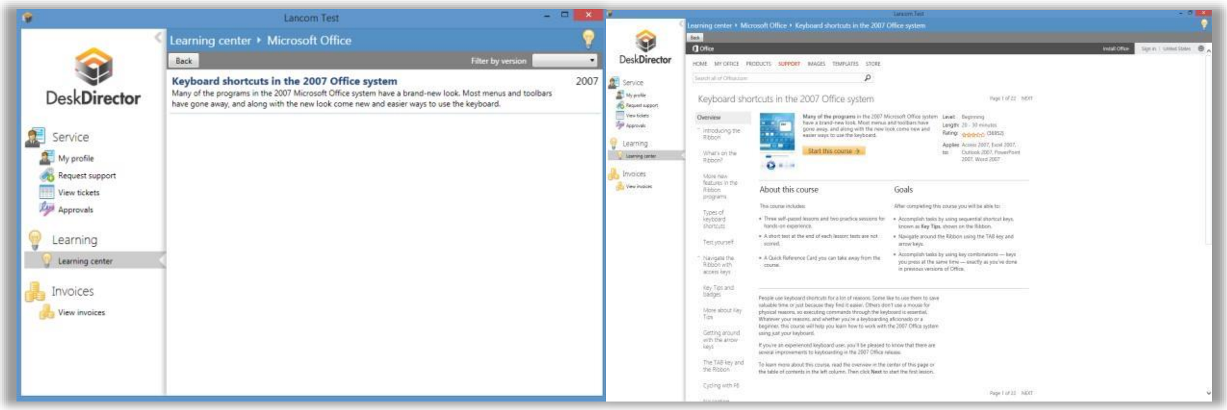
From this screen there are some settings you can change for this category.



1. Manage Filter: this is where you can limit the category to a selection of companies *or* contacts
2. Icon: you can change the icon shown in the client console for this category here
3. Top Level Category: enabling this makes this category appear on the navigation side pane of the client console
4. Auto Navigate to First Item: enabling this will automatically open the first item in this category
5. Add Learning: click here to add a learning link to the Learning Centre. You will need to give it a name, a description, a version, and a URL.

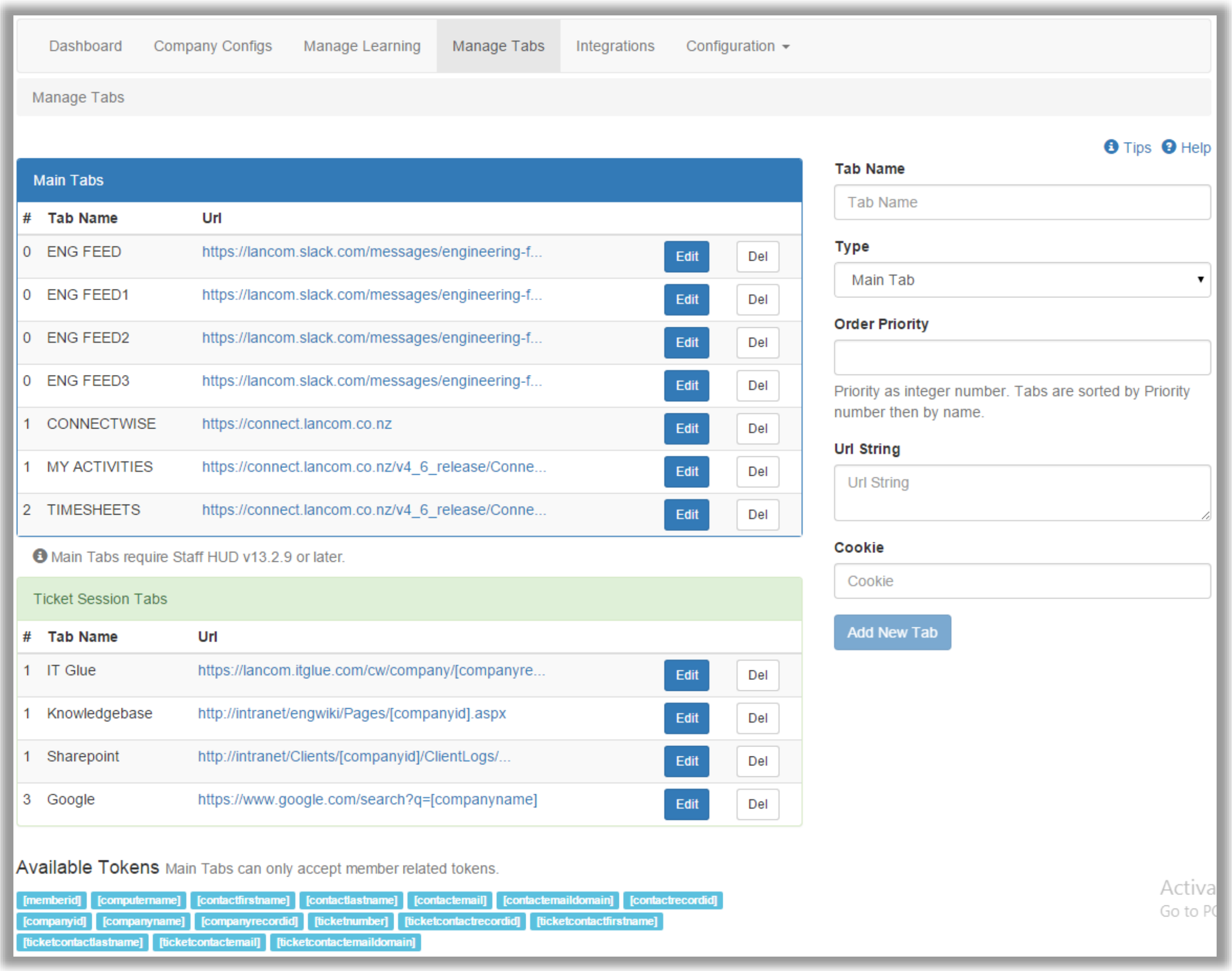
6. Tokens: these can be used inside your URLs. An example use-case is a Google search for a user's company. http://www.google.com/search?q=[companyname] this will search for the current user's company.

Customer View:

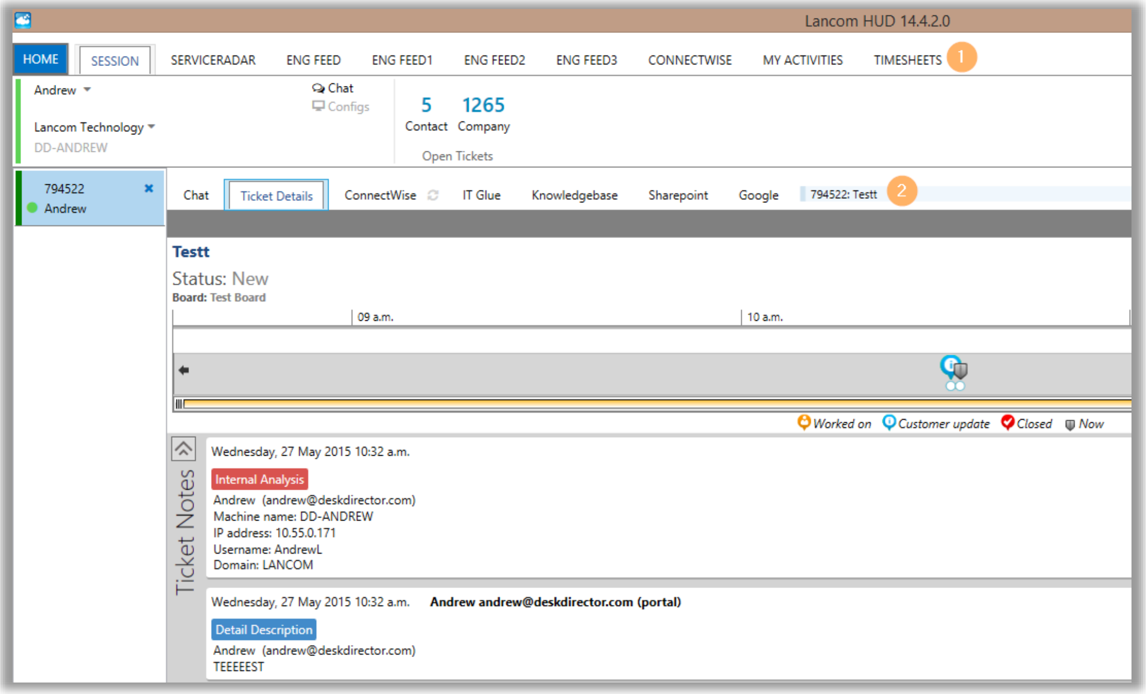


MANAGE TABS

This section configures which tabs you can access from the DeskDirector Staff HUD. There are two types of tabs; main tabs and session tabs. The difference between them is main tabs are always visible, and session tabs are visible when you have a ticket session opened.



The view from the Staff HUD best illustrates the difference:



1. Main tabs
2. Session tabs

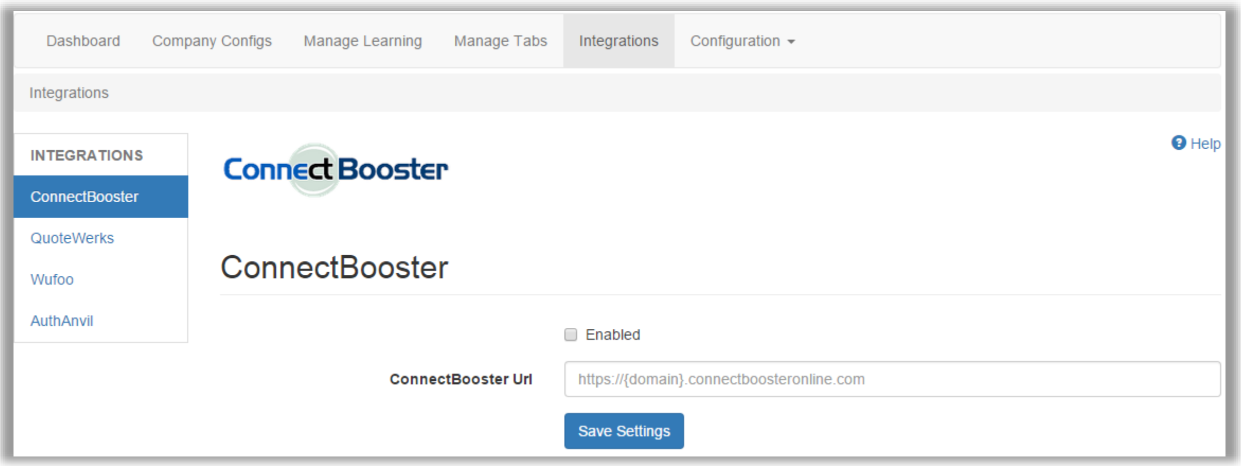
Like the Learning Centre it is possible to use tokens inside main and session tabs. The only caveat is that main tabs can only accept member related tokens.

Note: shown here are ConnectWise URLs – you can do the same with Autotask URLs.

INTEGRATIONS

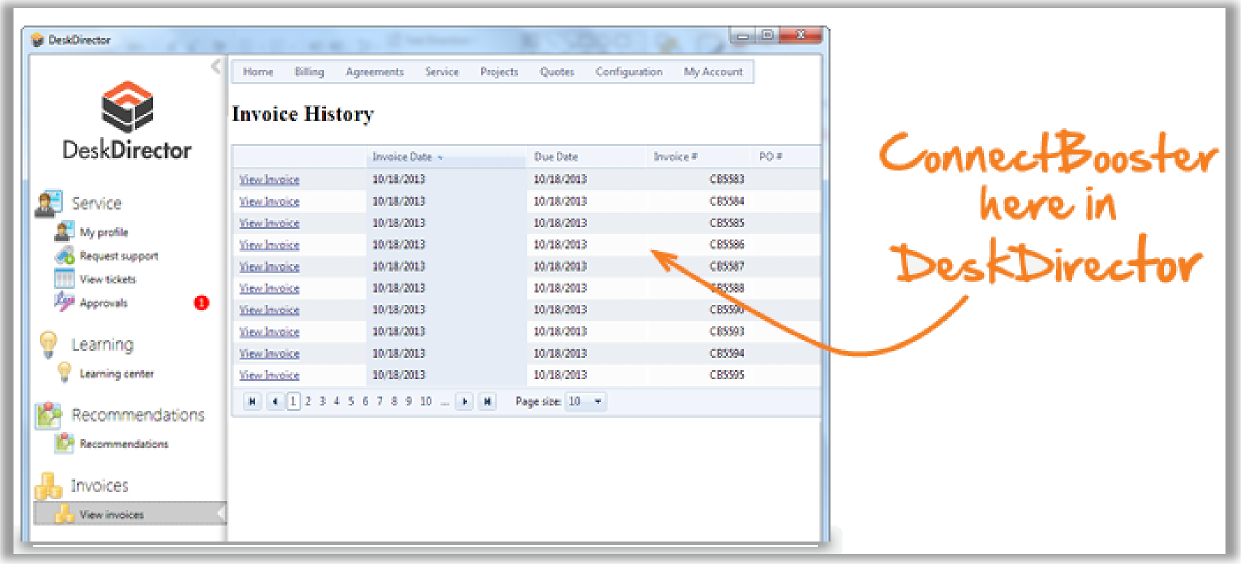
This section allows you to configure some of the integrations we have.

Connectbooster



All you need to do to enable your ConnectBooster integration is to check the enable box and enter your ConnectBooster URL. This allows your customers to pay their invoices directly from the client console.

From the client's perspective:

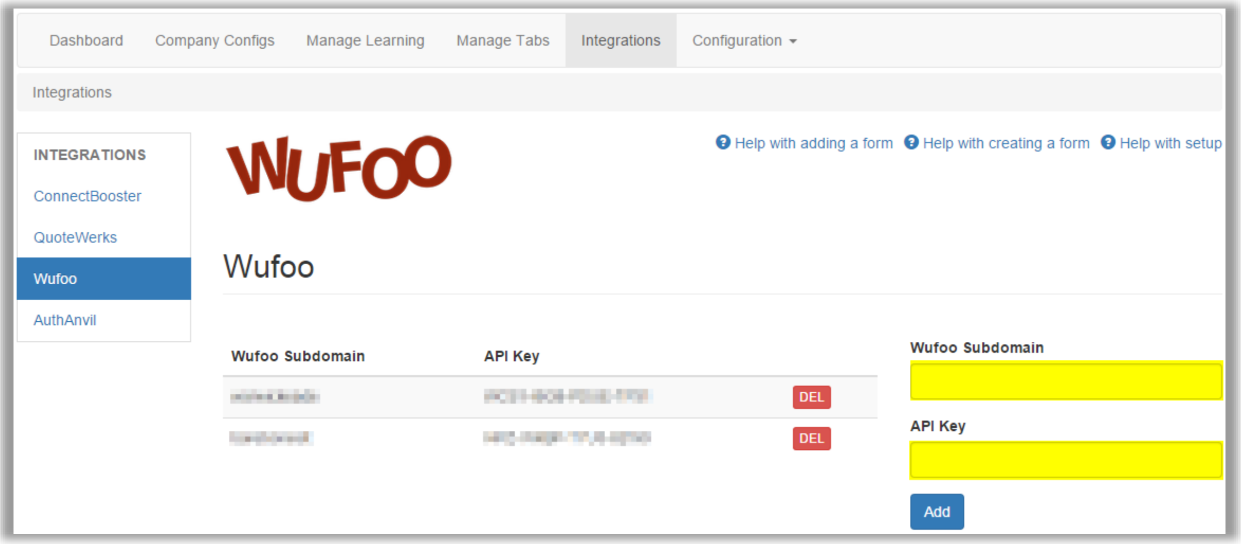


QuoteWerks

QuoteWerks allows your customers to access and approve quotes you have created for them from inside the Client Console. Just follow this knowledge base article on how to set up the integration.

Wufoo

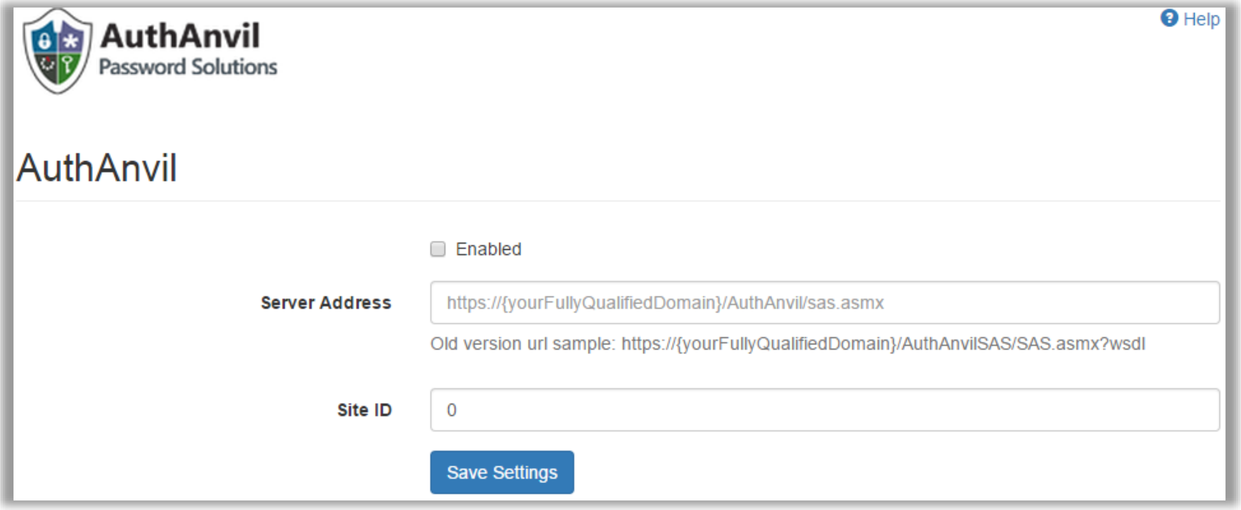
Wufoo is an online form builder. By using our integration with Wufoo your users can fill out a form to request support. This means that you can get that information that you need on the first contact but it also means your clients are guided through a structured support request. To set it up, register with Wufoo, enter your API key that you get from them, and your Wufoo subdomain.



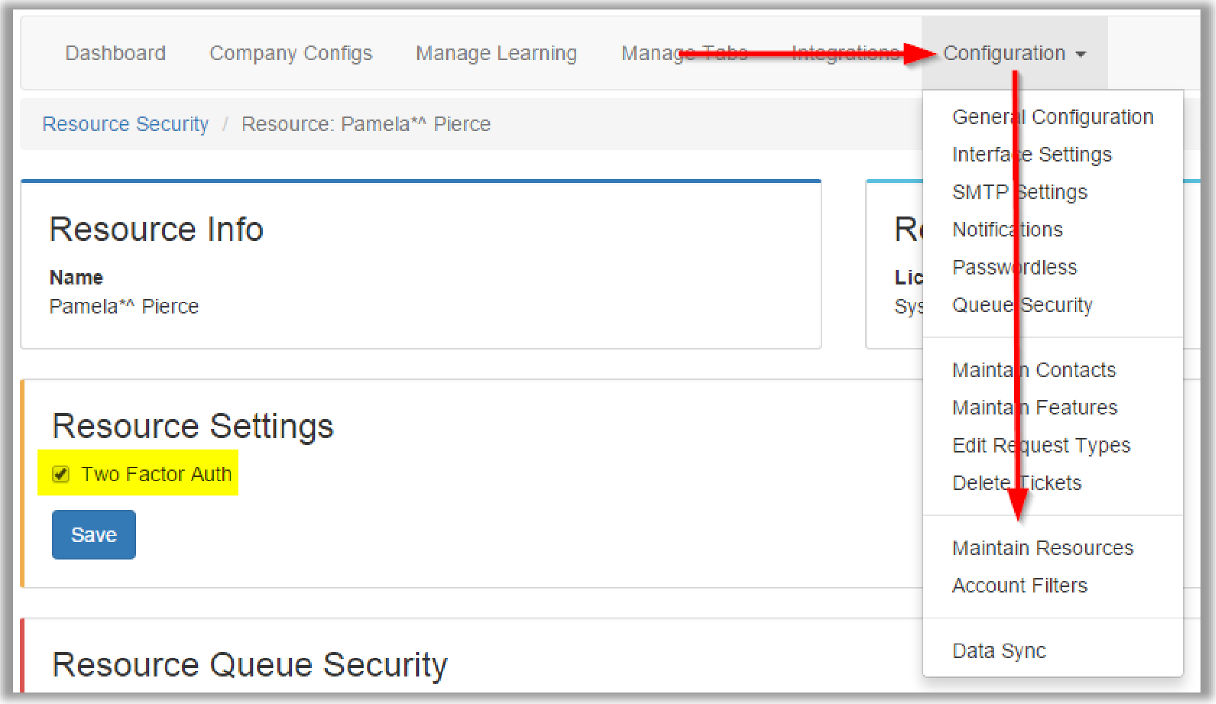
There are three helpful links on this page to help you with setting the Wufoo integration up.

AuthAnvil

To enable two factor authentication with AuthAnvil just enter your AuthAnvil domain and site ID.



You will have to enable two factor authentication within your resource's record on the Maintain Resources page. Click on the resource's name and check the two factor authentication check box.



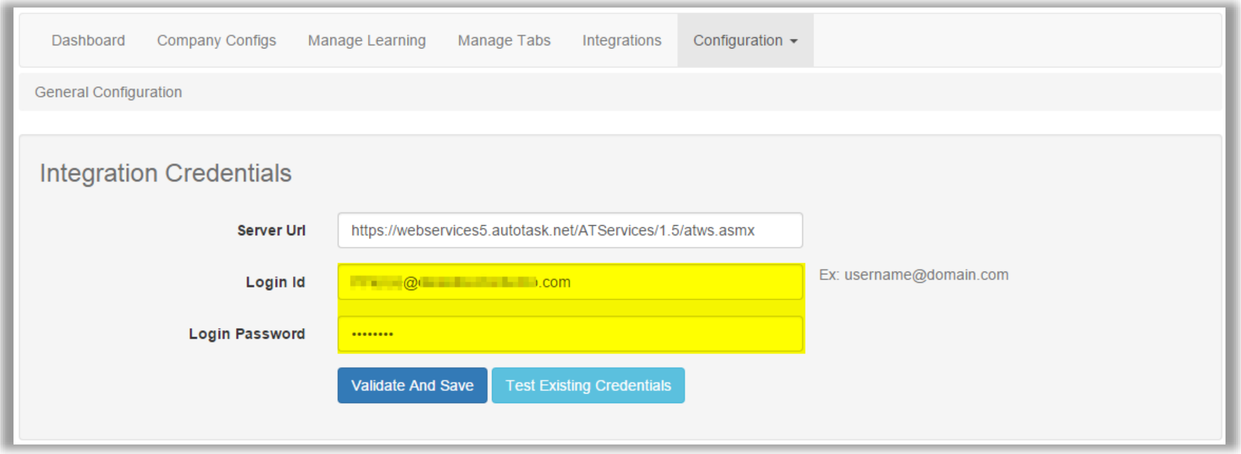
GENERAL CONFIGURATION

This section is the heart of DeskDirector and lets you set various settings, statuses, priorities, etc.

Autotask Integration Details

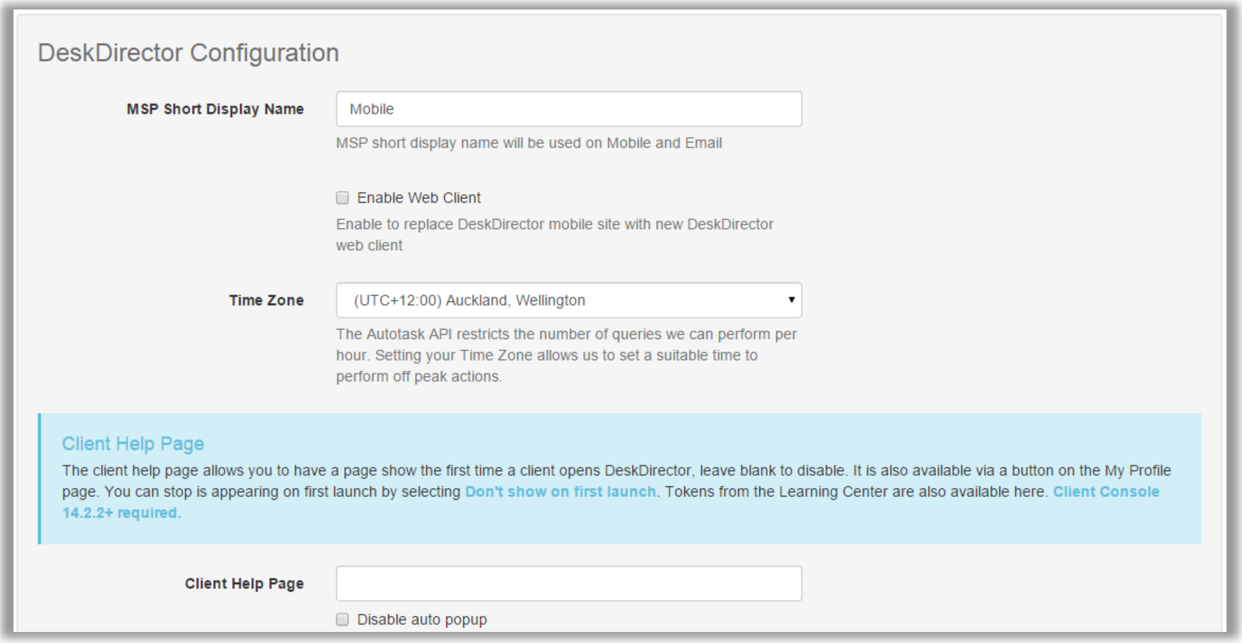
In this section, you will fill in the Autotask resource login id and password (there is no need to change the URL).

You can validate your credentials to test whether they are working by hitting the "test existing credentials" button.



DeskDirector Configuration

From here you can set the display name that DeskDirector web will use, your time zone – we use this to determine the best time to do off peak actions, and you can also enter a URL of a client help page which will be shown to users the first time they login to DeskDirector.



The Statuses and Priority below will be used to activate certain features within DeskDirector.

The VIP Priority name is the priority tickets will have when they are logged through DeskDirector by a VIP. Just select a priority from the drop-down box. Note: we pull these priorities and statuses from Autotask and sync them to our database, if you've made a recent change to your queues you will need re-sync the queue list.

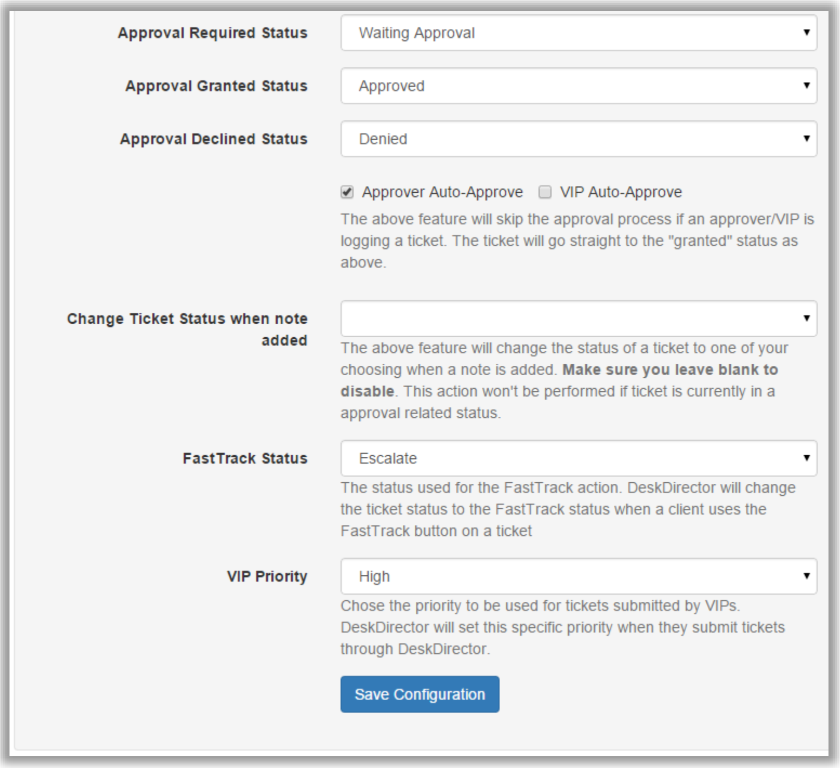
FASTTRACK STATUS – This status will be used for the Client FastTrack button

APPROVAL REQUIRED – This status will be set for all tickets needing approval

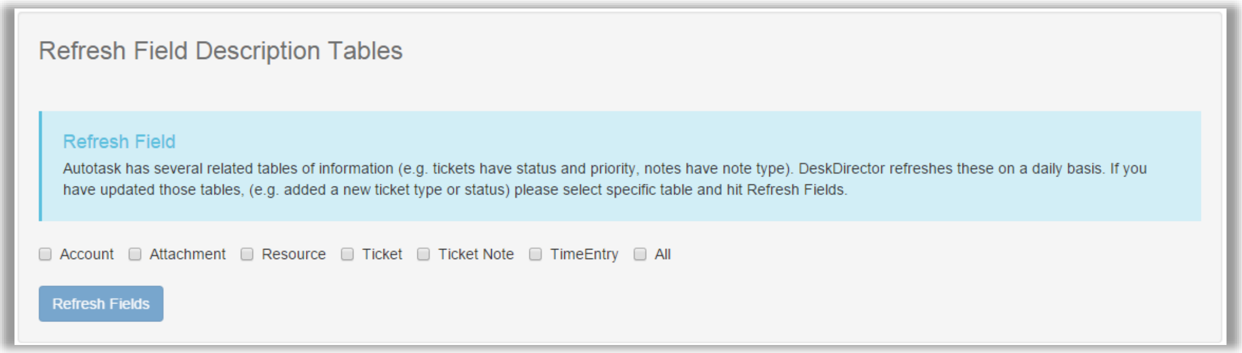
APPROVAL GRANTED – Ticket status will be changed if it has been approved.

APPROVAL DECLINED – Ticket status will be changed if the request was declined.

CHANGE TICKET STATUS WHEN NOTE ADDED – Ticket status to put the ticket into when a note is added to the ticket.



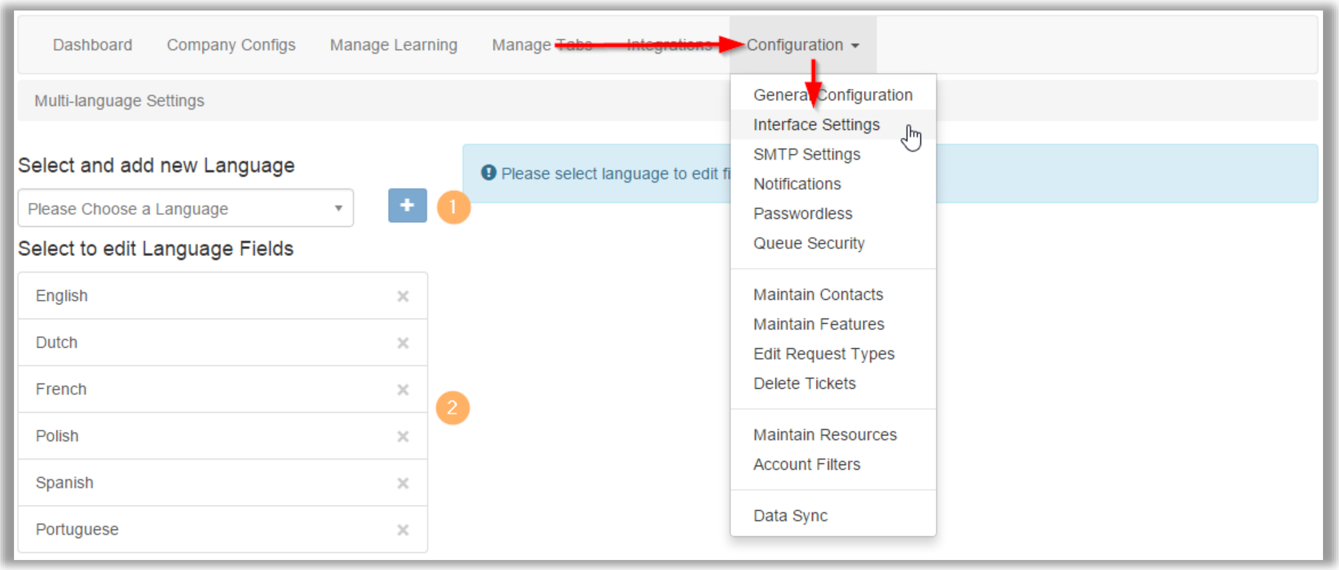
Re-sync Autotask Data



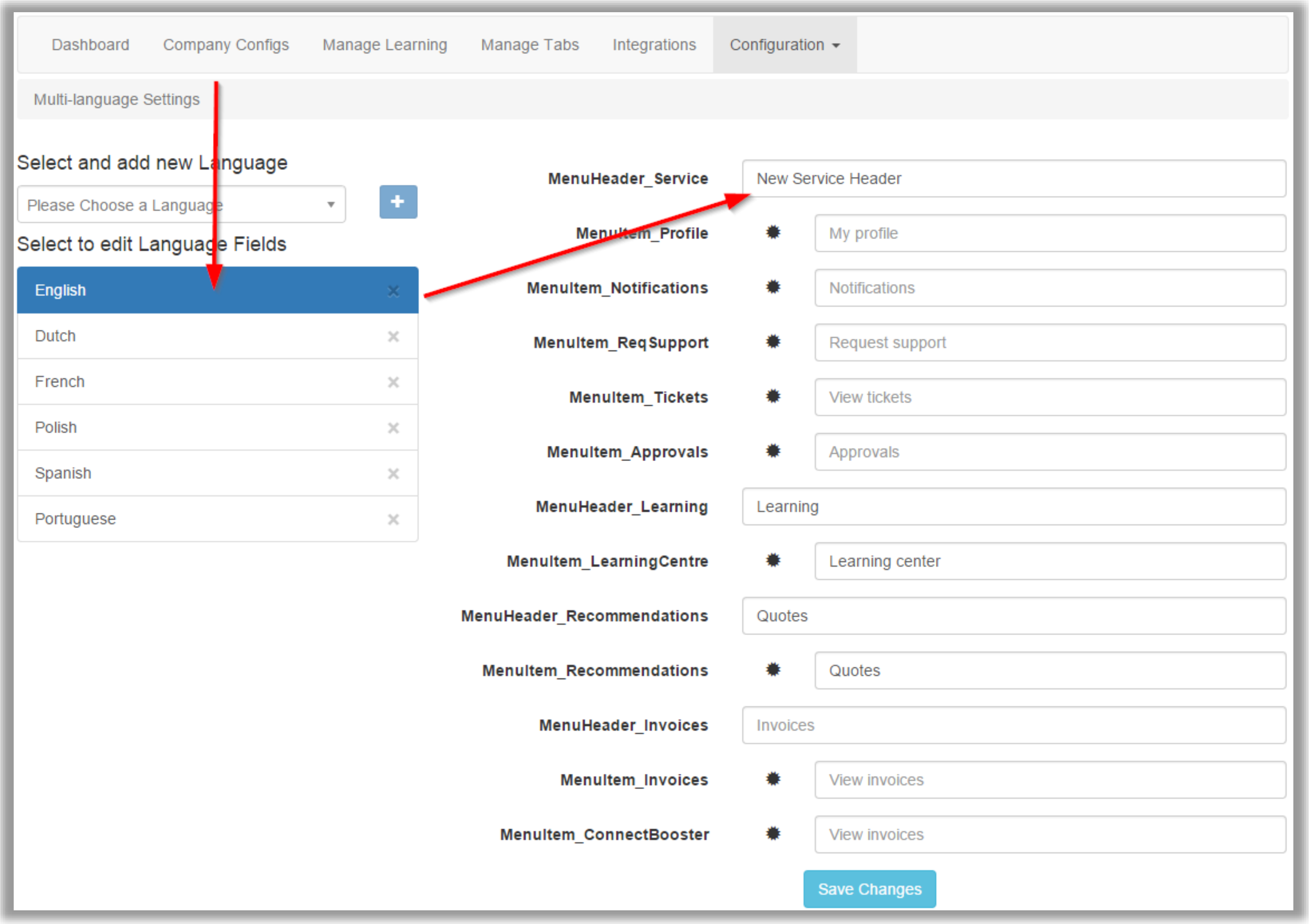
Just select which fields you want to re-sync to our database and hit refresh.

INTERFACE SETTINGS

DeskDirector web is multi-lingual – it is in this section where you can add or remove languages from the language drop down menu. You can also change the menu item translations/names for each language.

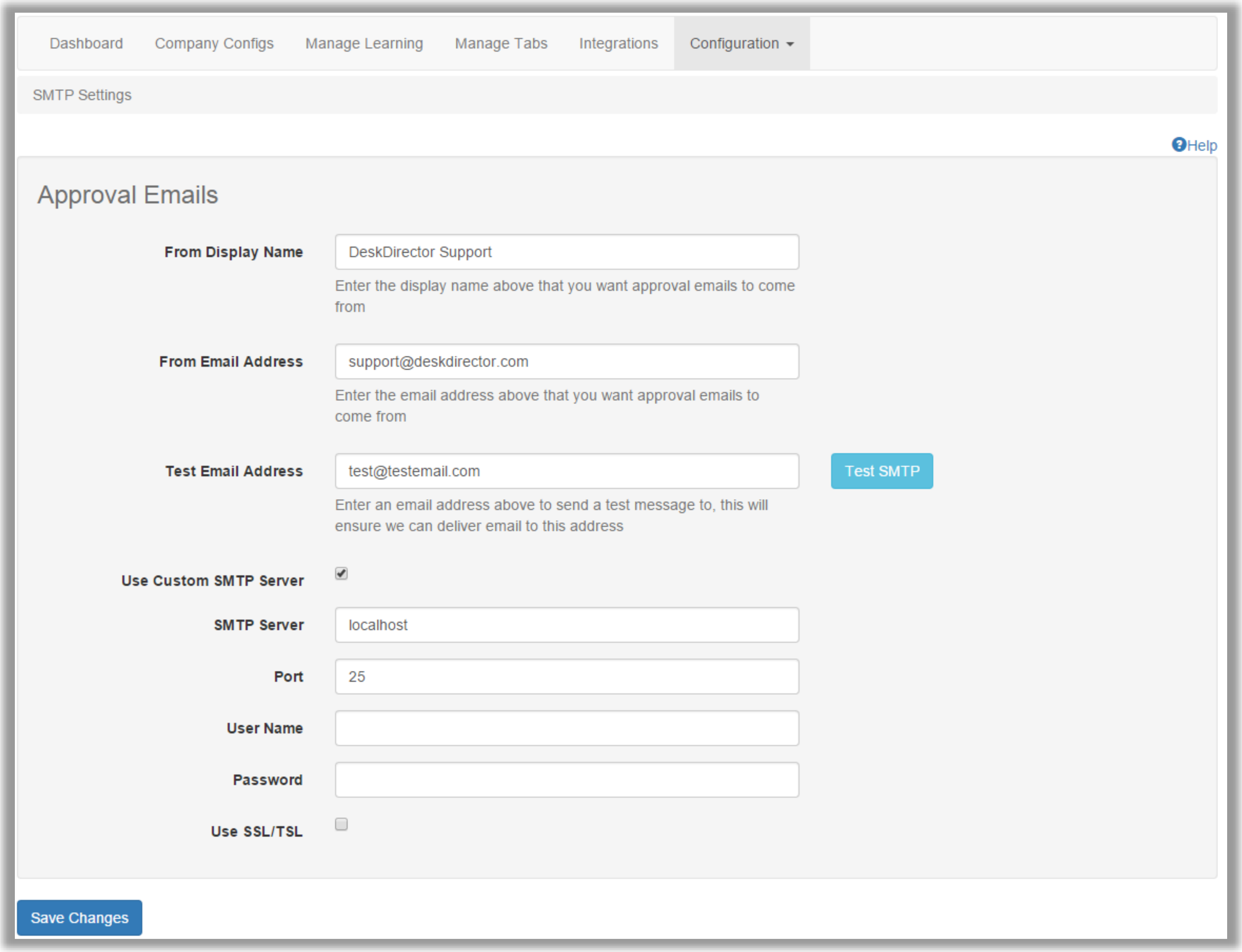


1. Select a language you want to be accessible from DeskDirector Web and hit the add button
2. Click on a language from this list to change the menu item



SMTP SETTINGS

With the case of Approvals, when a ticket is set to Approval Required, an email is sent to the list of contacts that have the approver permission. In order for this to work, we need some information from you on how you would like these emails to be sent:



FROM DISPLAY NAME – Just the name you would like to appear as the display name in your client's inbox

FROM EMAIL ADDRESS – Enter the email address that you would want approval emails to come from. For example: support@deskdirector.com

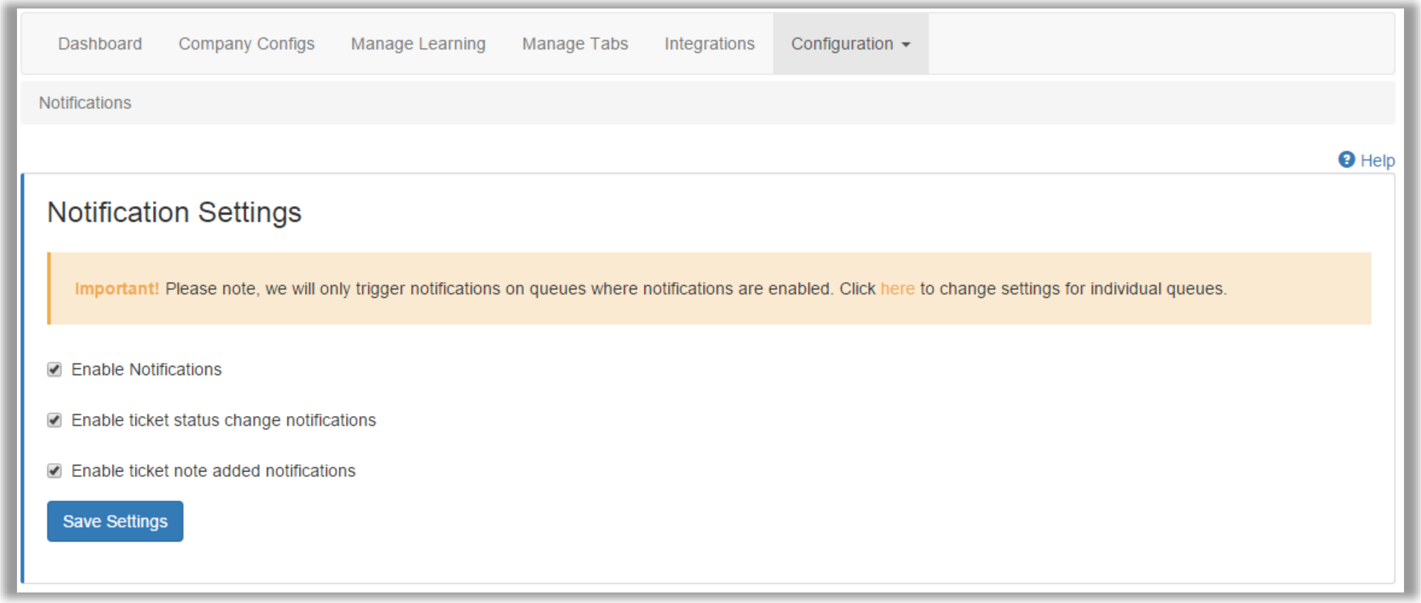
You can test whether you receive these emails by entering your email address here and hitting the Test SMTP button. We will send a dummy email to the address you enter here.

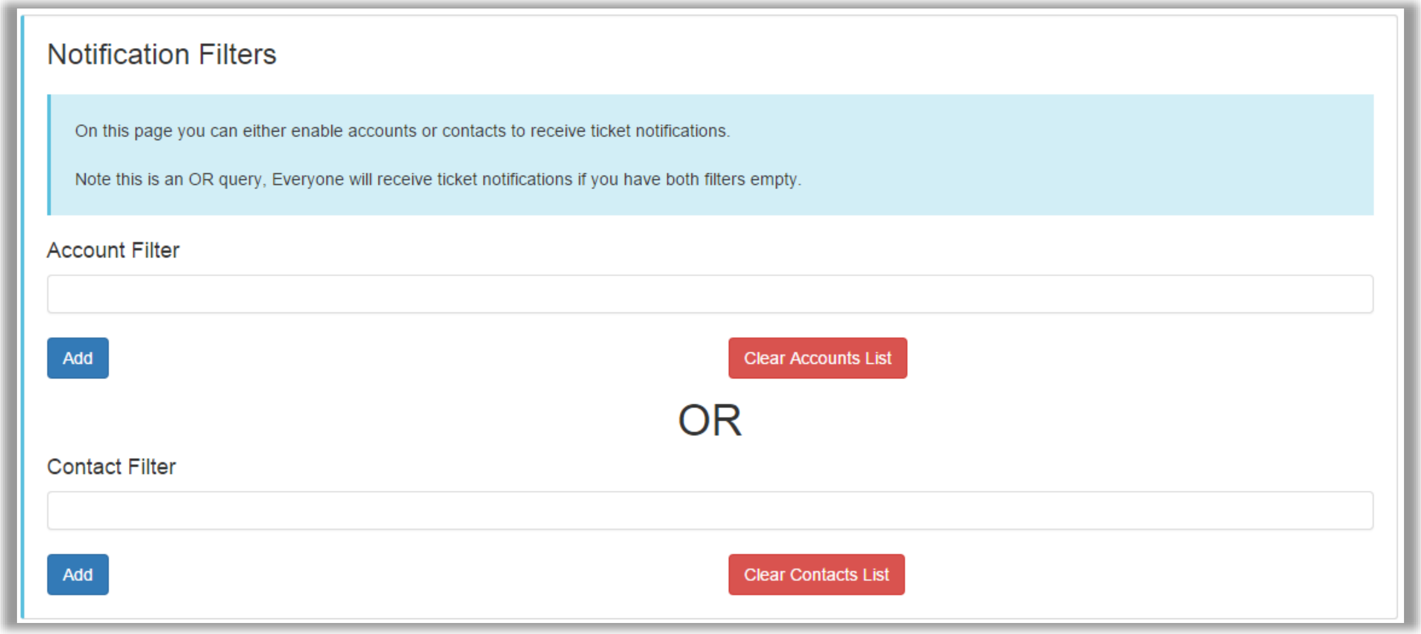
You can choose to use a custom SMTP server rather than our own Simply tick the box "Use Custom SMTP Server" and fill in your server details. We definitely recommend doing this to ensure mail arrives at the recipients' mailboxes.

Further reading: Head to the following link to learn more about DeskDirector's approval process: http://kb.deskdirector.com/knowledgebase/articles/243981-approvals-in-deskdirector

NOTIFICATIONS (PRO PLAN)

In this section you will be able to select which type of notifications DeskDirector sends to your clients as well as which companies or contacts receive these notifications. In this section there are two types of notification: ticket status change notifications and ticket note added notifications.



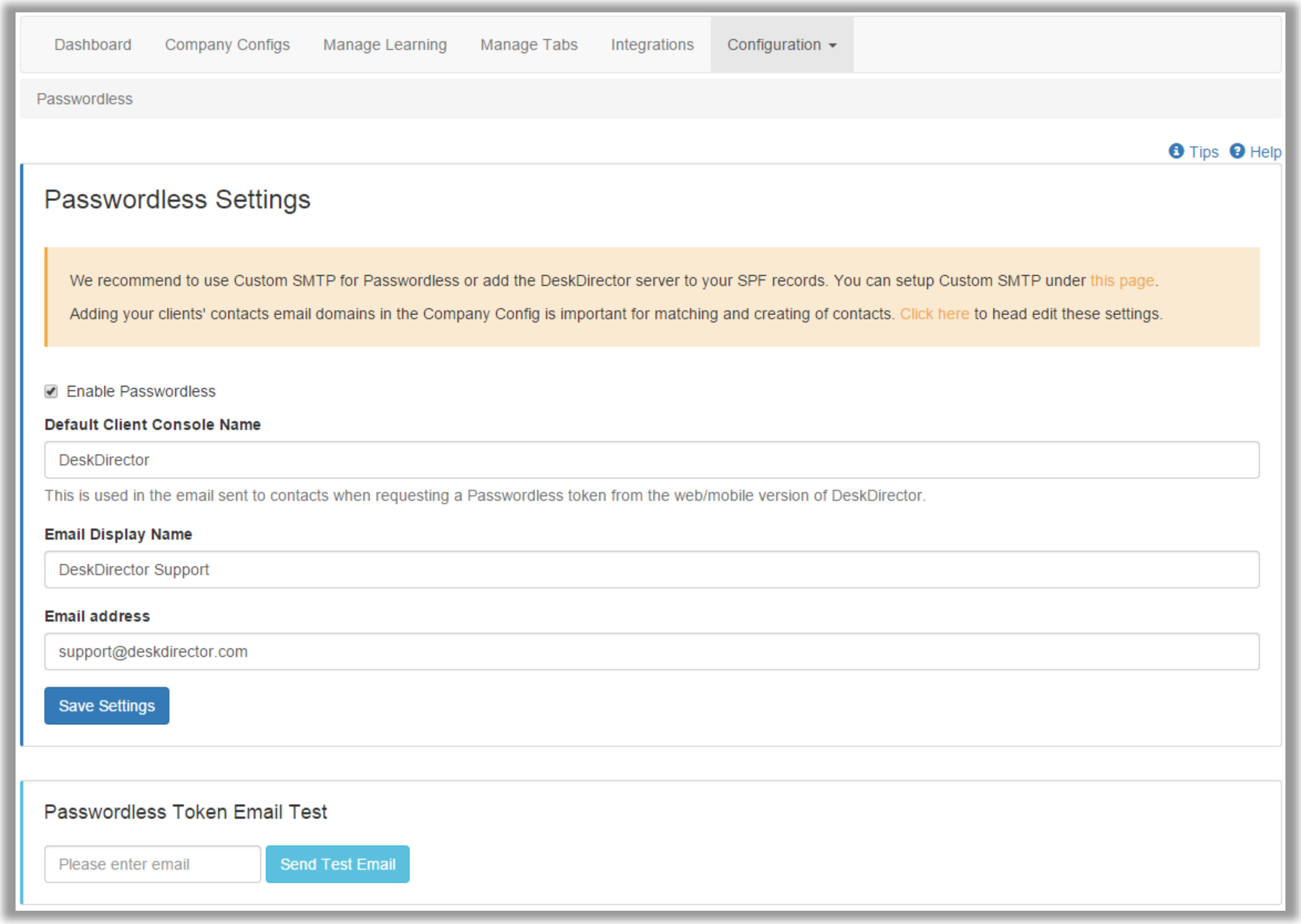


Simply tick the notifications you want to enable and hit save. If you want to set up a filter just hit the add button and select an account. Selected accounts will have access to notifications, anyone not listed will not receive notifications. A blank filter means everyone receives notifications.

In order to notifications to be received by your clients you must enable notifications on each queue you want to use notifications on. This is done on the queue security page.

PASSWORDLESS

In this section you can enable the Passwordless feature. Simply tick the checkbox and populate the form with the required info. If you have set up a custom SMTP server we will forward the Passwordless emails through there.

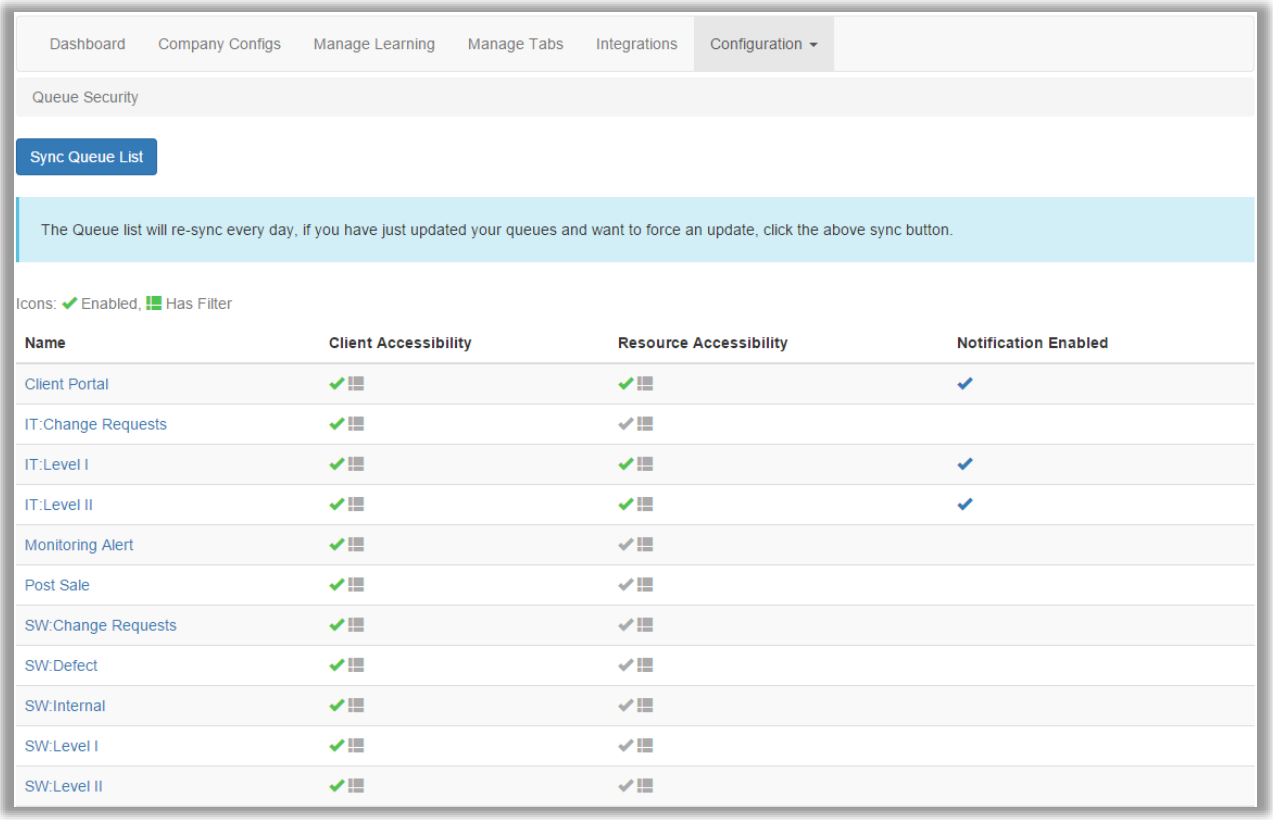


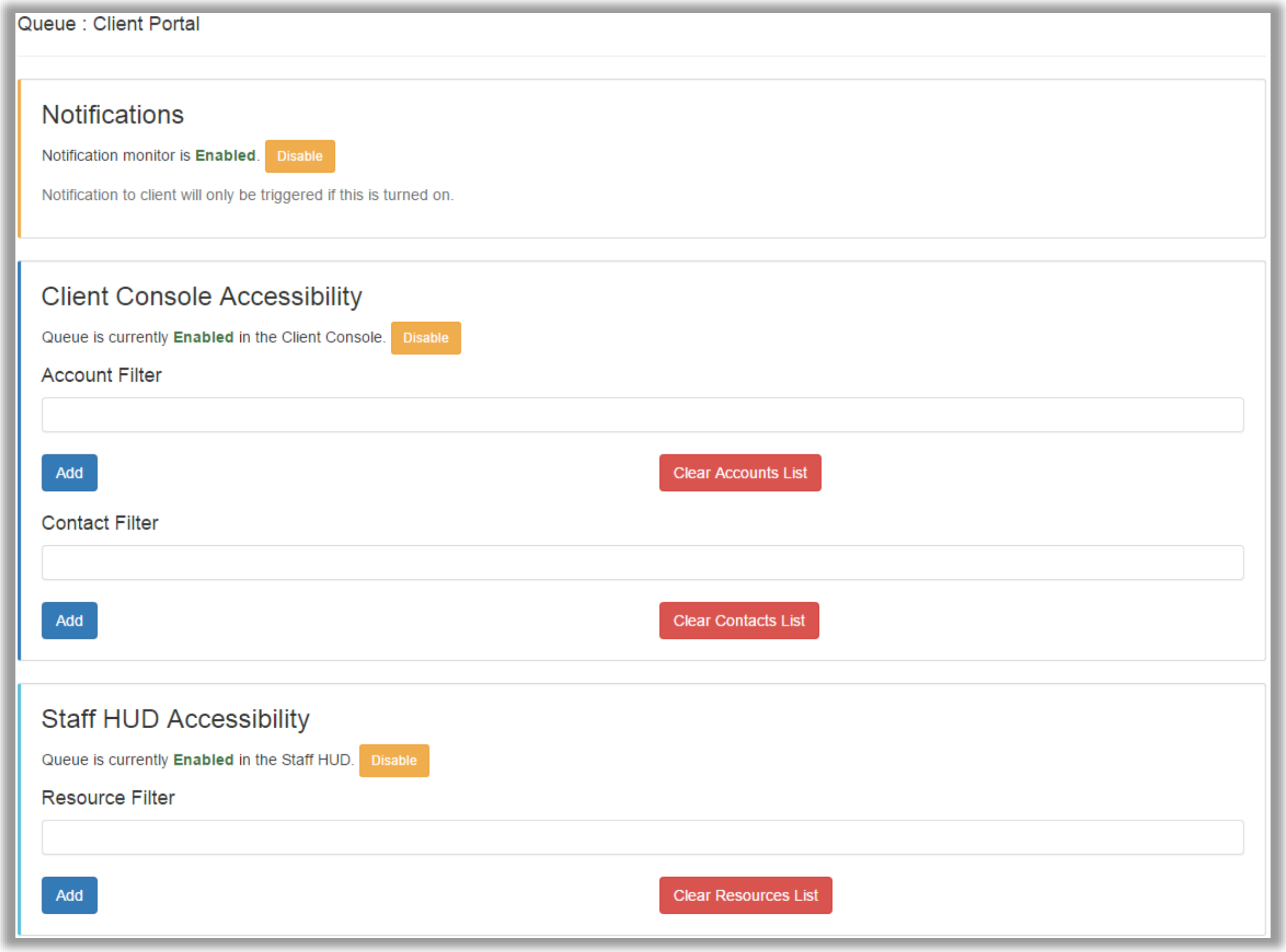
You can also test to see whether you will receive the Passwordless token email by entering your email address and hitting the test email button.

QUEUE SECURITY

From the queue security page you will be able to see which of your queues are accessible by clients, accessible by your Staff, and which of your queues have notifications enabled. You can also change these settings for each individual queue by drilling into the queue name.

The following image show the list of queues with a quick view of the features enabled and whether those features have a filter or not. The next image is of the client portal queue; from here we can enable certain features and filter access to them as well.


Dashboard
Company Configs
Manage Learning
Manage Tabs
Integrations
Configuration
Queue Security
Sync Queue List
The Queue list will re-sync every day, if you have just updated your queues and want to force an update, click the above sync button.
Icons: Enabled, Has Filter
Name
Client Accessibility
Resource Accessibility
Notification Enabled
Client Portal
IT:Change Requests
IT:Level I
IT:Level II
Monitoring Alert
Post Sale
SW:Change Requests
SW:Defect
SW:Internal
SW:Level I
SW:Level II

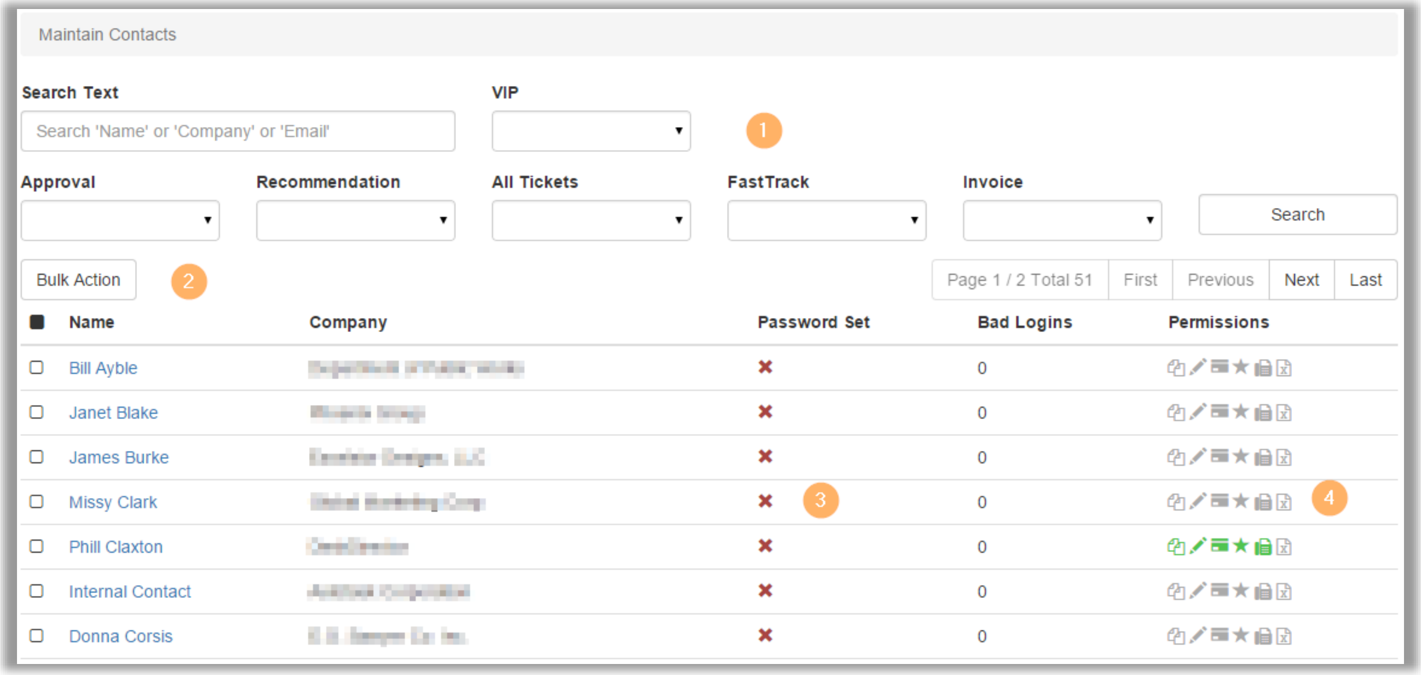

Queue : Client Portal
Notifications
Notification monitor is Enabled. Disable
Notification to client will only be triggered if this is turned on.
Client Console Accessibility
Queue is currently Enabled in the Client Console. Disable
Account Filter
Add
Clear Accounts List
Contact Filter
Add
Clear Contacts List
Staff HUD Accessibility
Queue is currently Enabled in the Staff HUD. Disable
Resource Filter
Add
Clear Resources List

MAINTAIN CONTACTS

In this section, you can view details on your contacts. The list provides a view of their name, their company, whether they have a password set, how many bad login attempts they have made, and what permissions they have.

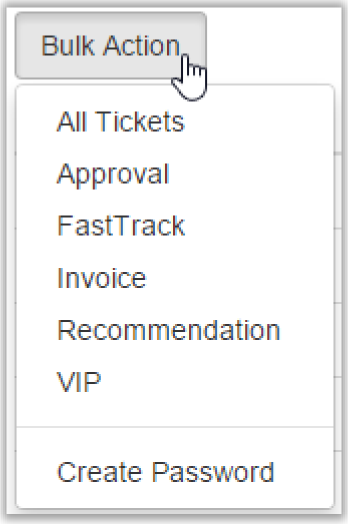
Contacts can have the following permissions:

- ALL TICKETS – they will be able to see tickets from anyone at their company rather than just their own
- APPROVAL – this contact is an approver for their company. Any tickets logged by their staff using a request type that requires approval will need to be approved by this contact.
- RECOMMENDATION – this contact will be able to view their recommendations within DeskDirector
- VIP – this contact is marked as a VIP; tickets created by this contact will have the VIP priority you have set up. You can also allow them to have their tickets approved automatically on the general configuration page.
- FASTTRACK – this contact has access to the fasttrack feature, they will have an extra button available for them when they are viewing a ticket
- INVOICE – this contact will be able to view their invoices inside DeskDirector



1. Filter – you can filter down contacts using these drop down boxes
2. Bulk action – from here you can perform actions on all the contacts you have selected
3. Password set – you can quickly check whether a contact has a password set
4. Permissions – you can quickly see what permissions each contact has

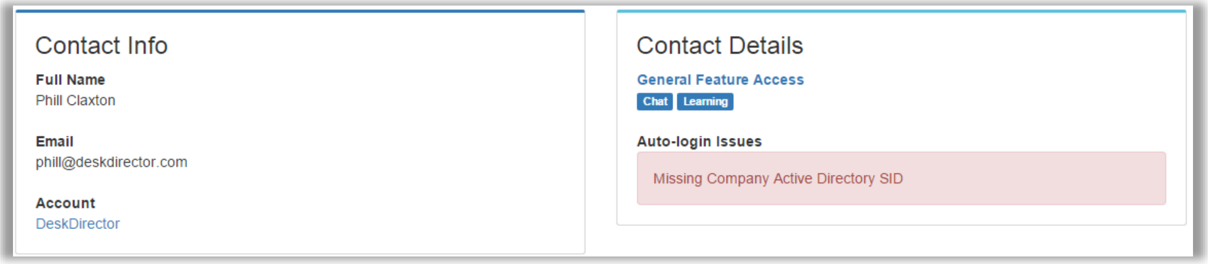
Bulk Actions

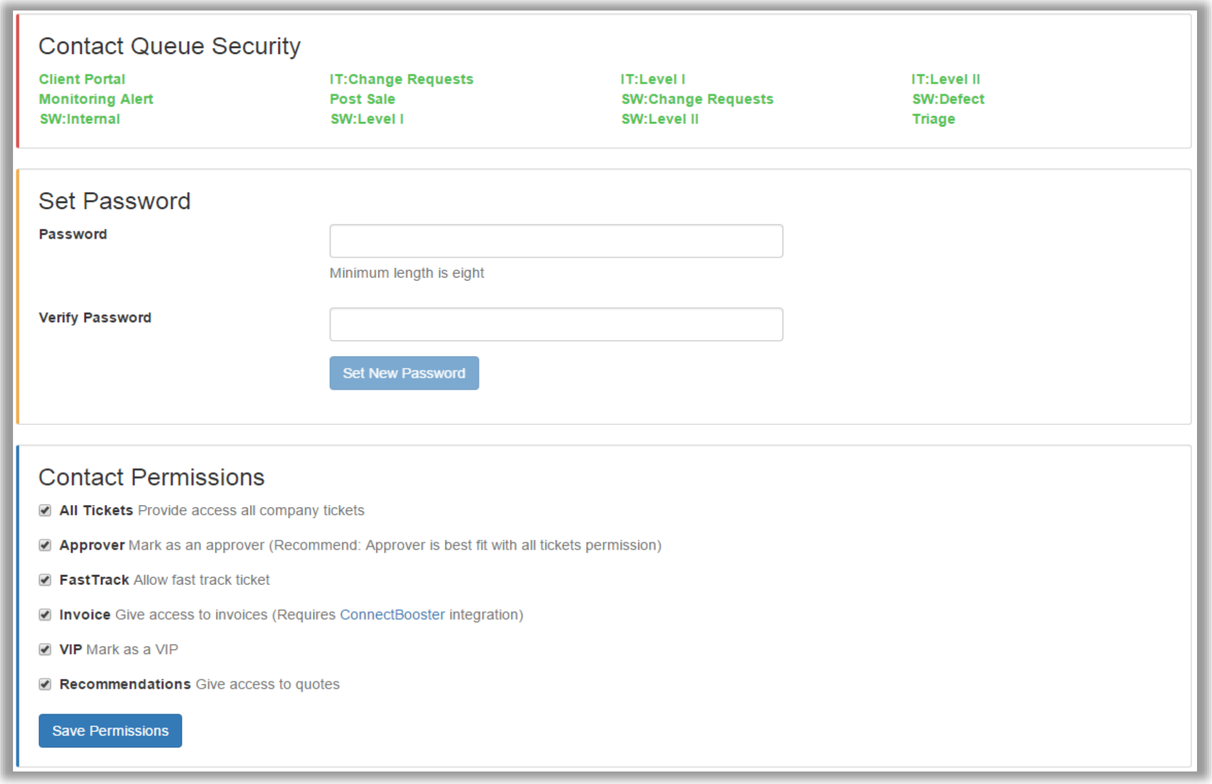


Bulk actions allow you to apply permissions to multiple contacts at once.

- Apply a filter using the drop down boxes
- Select the contacts you want to receive a certain permission
- Select the permission
- In the following modal that pops up; select whether you want to enable the feature or disable it

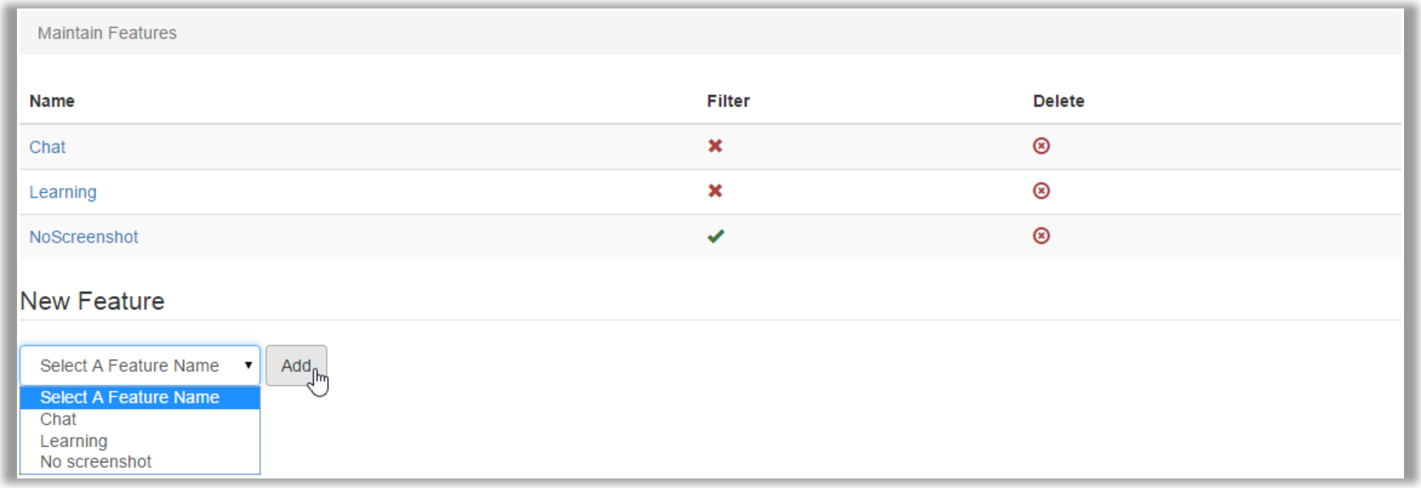
If you drill down into one of the contact records you will be able to see a bit more information on that contact and set a password for them, as well as enable permissions.



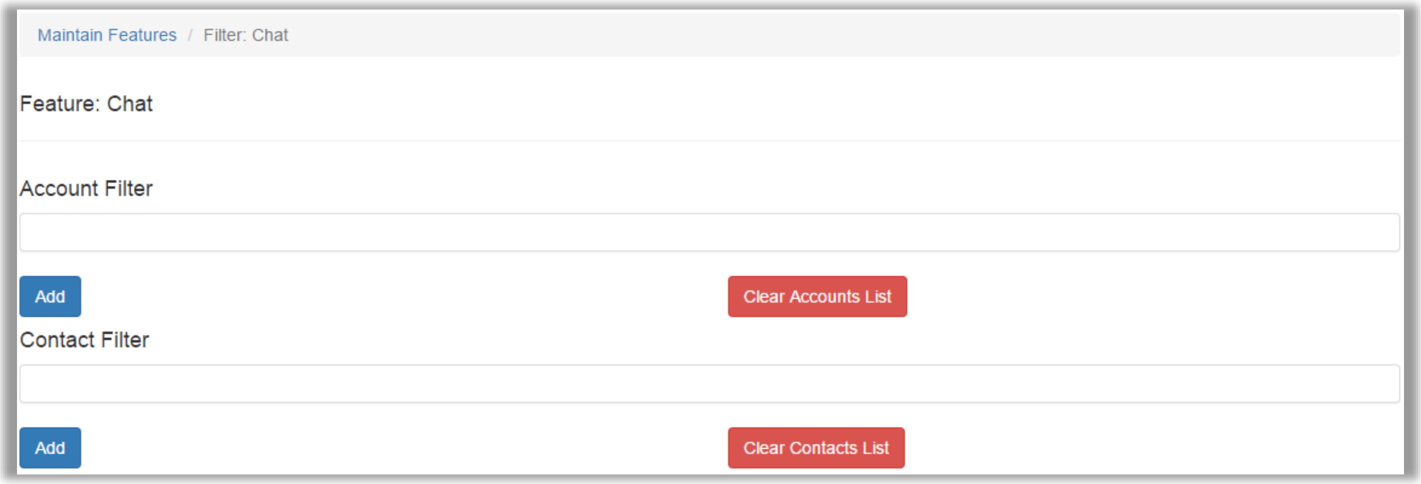


MAINTAIN FEATURES

From here you can enable chat and the learning centre for your clients.



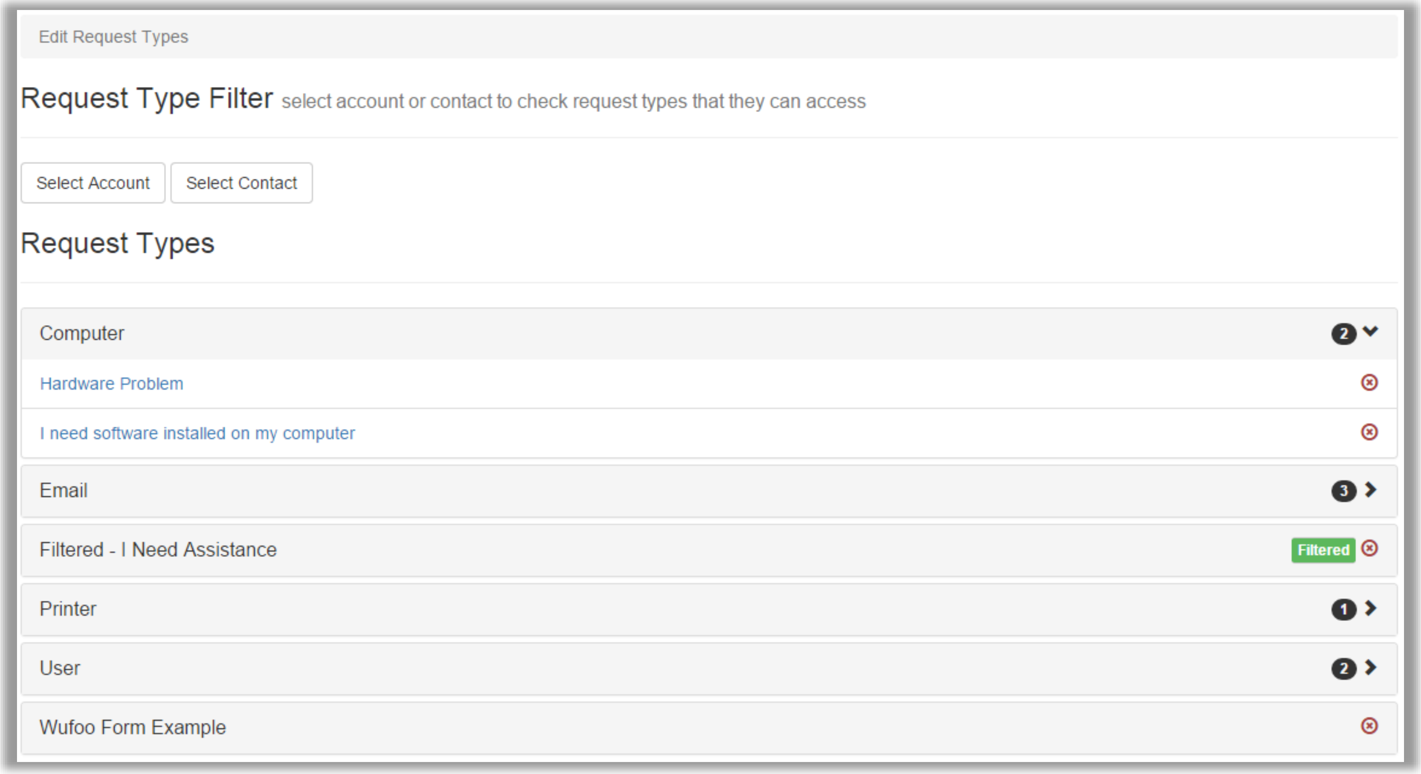
Just select a feature from the drop down and click add. After it has been added to the feature list, you will be able to drill down into the feature to apply an account or contact filter.

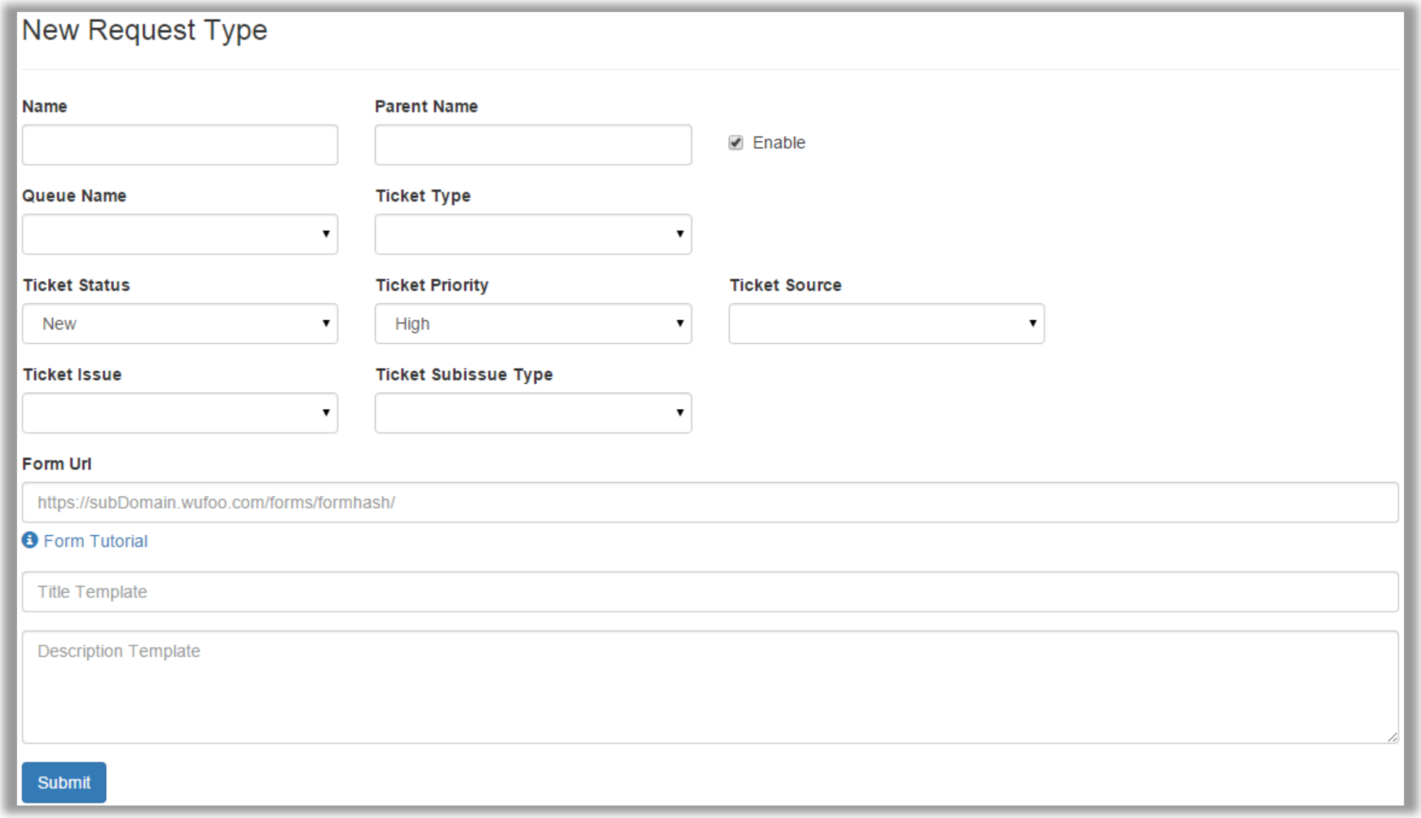


EDIT REQUEST TYPES

This section is especially important – this is where you set up request types that your customers can use to request support. You can also set up account or contact filters for each request type. Creating a request type is easy – just enter the name and parent name (top level category name), and select the rest from the dropdowns.

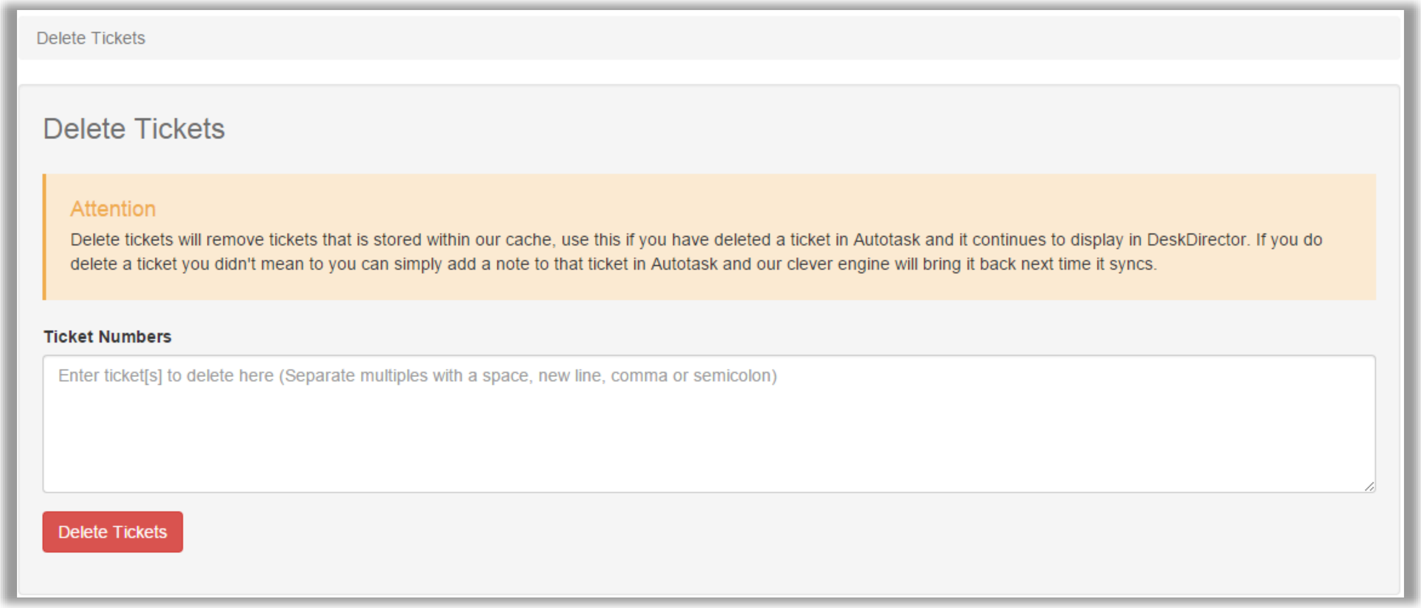
You can also paste a Wufoo form URL into the “form URL” field. This will embed your Wufoo form into DeskDirector allowing you to get all the information you require in the first contact with your clients.


Edit Request Types
Request Type Filter select account or contact to check request types that they can access
Select Account
Select Contact
Request Types
Computer
2
Hardware Problem
I need software installed on my computer
Email
3
Filtered - I Need Assistance
Filtered
Printer
1
User
2
Wufoo Form Example


New Request Type
Name
Parent Name
Enable
Queue Name
Ticket Type
Ticket Status
New
Ticket Priority
High
Ticket Source
Ticket Issue
Ticket Subissue Type
Form Url
https://subDomain.wufoo.com/forms/formhash/
Form Tutorial
Title Template
Description Template
Submit

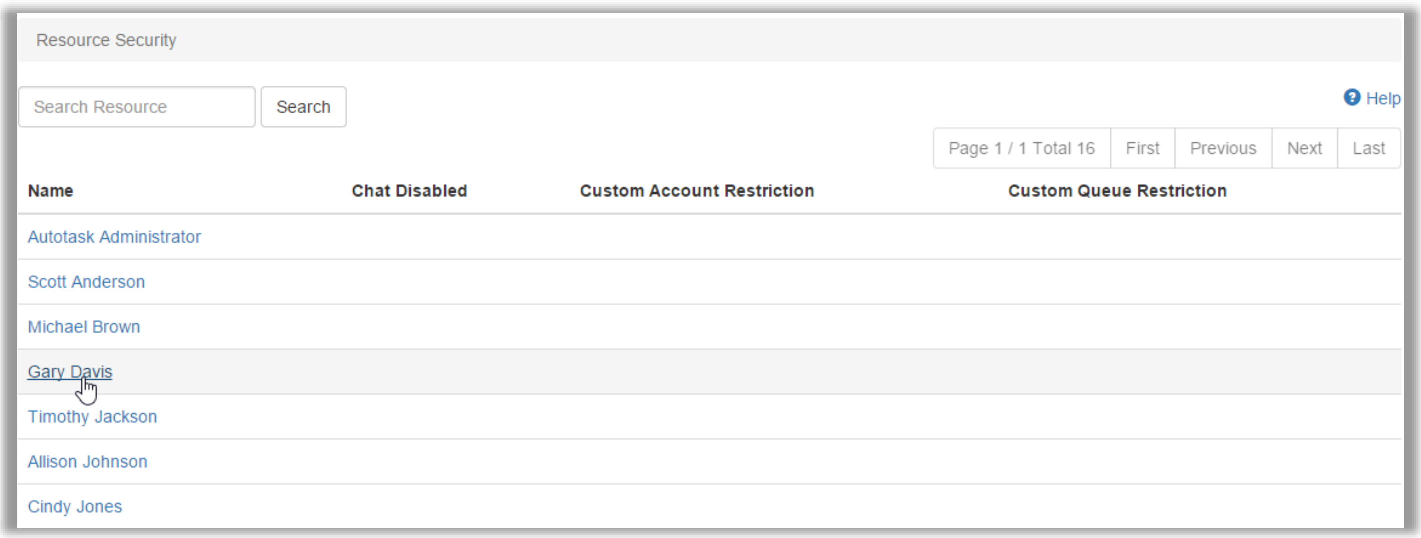
DELETE TICKETS

Because there is no practical way to check your Autotask instance for deleted tickets, we need to you tell us which tickets you have deleted if you ever do. Just head over to the delete tickets section and enter a list of ticket numbers. Once this action has been performed those tickets will no longer show up in DeskDirector.

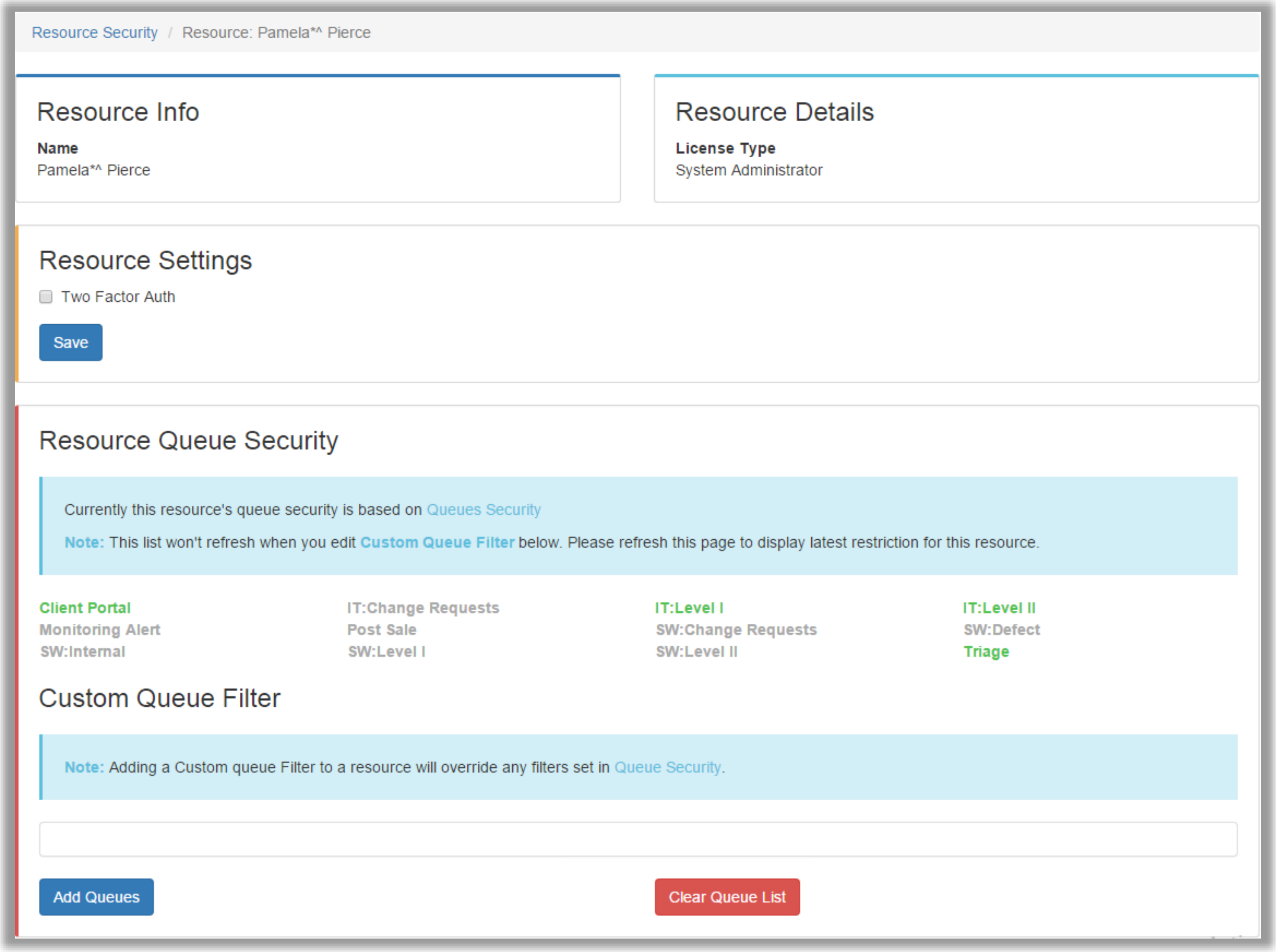


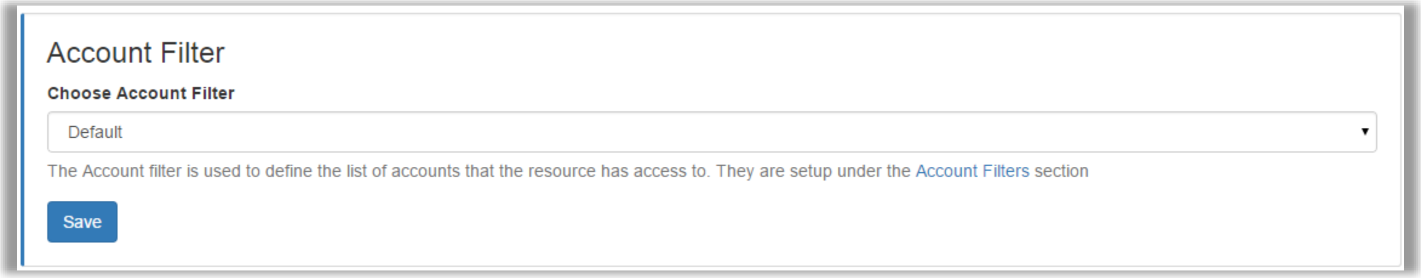
MAINTAIN RESOURCES

From this page you can see all of your Autotask resources and what restrictions they have on their Staff HUD. By drilling into a resource you can set an account restriction to limit the HUD to certain accounts for that resource. You can also set a custom queue restriction, so that resource will only have access to certain queues.



Drilling into a resource:



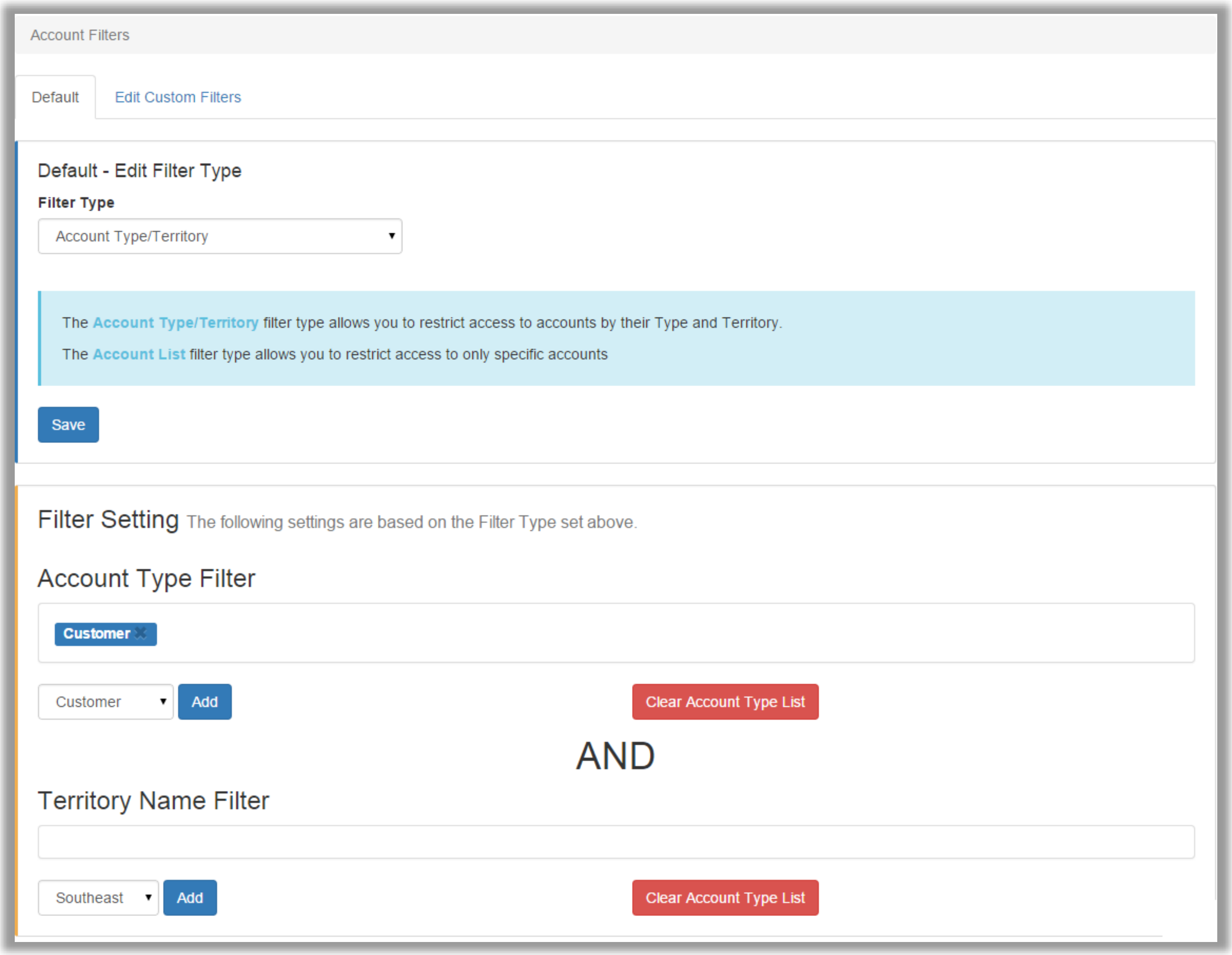


Queues listed in green are accessible by this resource from the Staff HUD. By adding a queue filter you will be able to further restrict queue access in the Staff HUD.

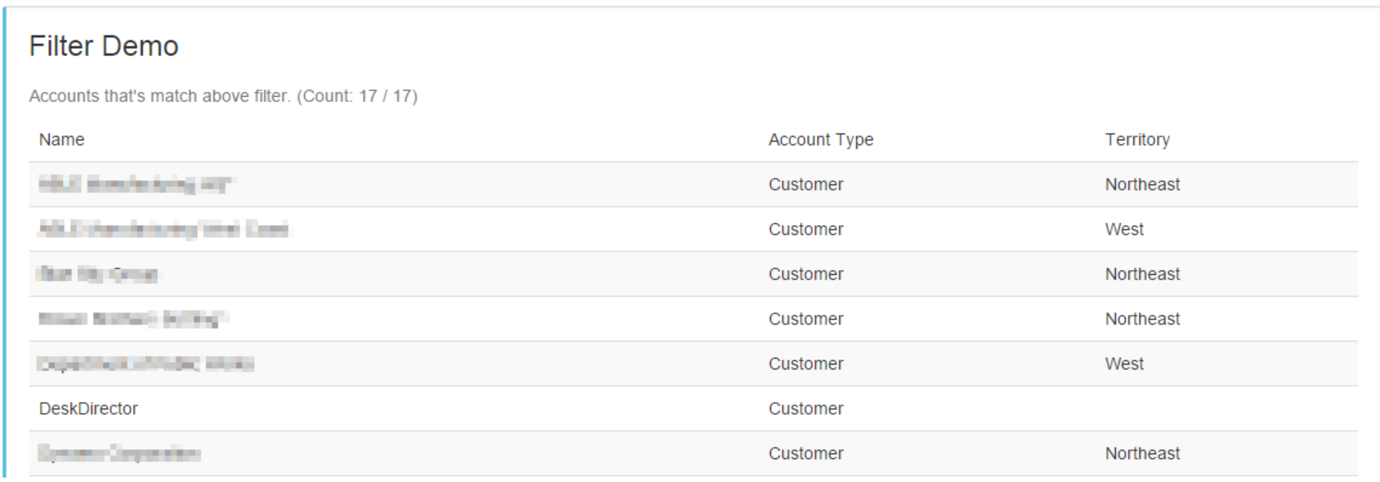
To add an account filter, select one from the drop down. Custom account filters can be created from the Account Filters section.

ACCOUNT FILTERS

In this section you can create or alter account filters for the Staff HUD. Account filters restrict which types of company are accessible from the Staff HUD. The default account type filter is “customer”, this means that only companies that are paying customers of yours are visible from the various drop downs and list views of the Staff HUD.



At the bottom of this page you can check out which companies are included in the filter:



Filter Demo

Accounts that's match above filter. (Count: 17 / 17)

Name	Account Type	Territory
[illegible]	Customer	Northeast
[illegible]	Customer	West
[illegible]	Customer	Northeast
[illegible]	Customer	Northeast
[illegible]	Customer	West
DeskDirector	Customer	
[illegible]	Customer	Northeast

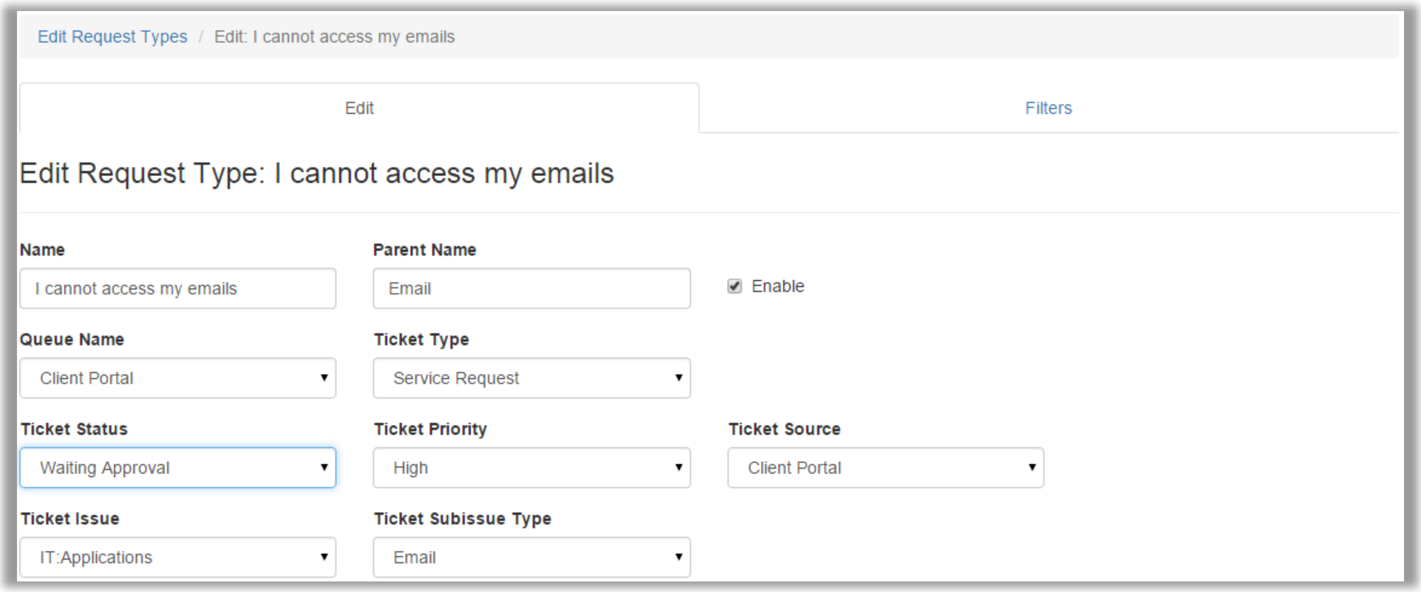
DeskDirector Feature Setup

APPROVALS

Approvals in DeskDirector work by leveraging both queue statuses and request types. As a result you end up with a very flexible approval system.

Approval Workflow

- The client chooses a request type in DeskDirector (e.g. I need a new employee setup) these request types are created and configured in the Edit Request Types section of the Admin Console.
- When the ticket is submitted the ticket is created and set with a specific status. DeskDirector has been configured in the General Configuration section of the Admin Console to know the name of the status that is used for tickets requiring approval (e.g. Approval Required). See example below of a request type.



- Approvers who you have given the approval right to from that company will then receive an email and a notification (if on DeskDirector pro or enterprise plans) that there is a ticket that requires approval. They can then navigate to the approval section to grant or deny the support request.
- They will be asked for a reason for granting or denying, which will be added as a note to the ticket. The ticket will be put into your approval granted status if the approver grants approval, else it will be put into the deny status if they decline.
- An email is sent to all approvers letting them know if a ticket has been granted or declined.

Approval Setup

In order to setup approvals, just follow the simple instructions below:

- Create three statuses on each Autotask queue you intend to have tickets that need approval. These statuses can have any name you like but one will be needed for tickets that require approval (e.g. Approval Required), one for if that approval was given (e.g. Approval Granted) and another if it was denied (e.g. Approval Denied).
- Add the names of these statuses to the three fields in the General Configuration section of the Admin Console.

- Now this is done you will need to choose the request types that need approval, these are often those that are a change or are security related such as access rights. Once selected all you need to do is edit the type and change the "Ticket Status" section to create the ticket in the approval required status.
- Finally you will need to choose who the approvers at each client are. This is done by granting them the Approval right from the Maintain Contacts section.
- Make sure that the approvers also have the "access all tickets" right, otherwise they will not be able to approve tickets that don't belong to them.
- Optionally you can set DeskDirector to not require approval for tickets submitted by those you have given the approval right to. This is done in the General Configuration tab in the Admin Console. There is also an option to allow contacts who you have marked as a VIP to auto-approve.

It is often good practise to configure other workflow rules around the approval process to ensure approvals happen in a timely manner and that once approved tickets get handled correctly. Because the approval stages are just managed through statuses in Autotask you can still use the standard Autotask workflow rules to kick off workflow.

For example you could configure a workflow to change the Approval Granted status to another one that your dispatcher or coordinator is looking for (e.g. Ready to Schedule). Another example could be triggering an email to your team for a ticket that has been submitted requiring approval and hasn't been approved in over a week.

The power is in your hands.