



# Service Desk for Lotus Notes Configuration Guide

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Contact information	<a href="http://www.polymorph.co.uk">www.polymorph.co.uk</a>

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## RELEASE NOTES

The following list shows the changes to the product. The first two numbers refer to the version of the product.

- 1.2.1 Removal of dependency of HTTP server for Graphical Reporting
- 1.1.1 The button to select the categories for reference material documents has been modified so that when clicked it allows a single category to be selected.
- 1.1.2 In certain circumstances the button on the service request form to 'view related reference material' was not functioning as expected. This has been fixed.
- 1.1.3 The 'Management Dashboard with Graphs' was not correctly showing the number of documents in the inbox. This has been fixed.

## SYSTEM CONFIGURATION AND SETUP

### INTRODUCTION

The Service Desk application is a single Lotus Notes database used for managing any kind of service requests. Note that for most of the changes to the main settings, you need to close the database and re-open it for the settings to take effect.

This section has been written for the person with responsibility of deploying and configuring Service Desk. Typically this person has Lotus Notes/Domino admin skills.

Should you require assistance with the deployment and/or configuration of Service Desk, please contact your local reseller or the product vendor – Polymorph Ltd who can be found at:

[www.polymorph.co.uk](http://www.polymorph.co.uk)

### SETTING UP SERVICE DESK FOR THE FIRST TIME

Follow these steps to install a new instance of Service Desk on your Domino server:

#### Step 1: Create a database

Create a new blank database on your server ensuring that you have manager access to it.

#### Step 2: Setup appropriate access levels

Set up the Access Control List as required. Please refer to the section 'Access Control Settings' below for information on roles etc.

#### Step 3: Add the database design

Replace the design of the database with the Service Desk template that has been supplied to you. Refer to your Lotus Domino Admin Guide for information on how to do this.

#### Step 4: Sign the database

You must now sign all design elements of the database. Refer to your Lotus Domino Admin Guide for information on how to do this. The signer must have access to run restricted agents on the server.

#### Step 5: Enter the license key

Ensure that the Notes ID that you are currently using has the Admin role and open the database. You will be prompted to enter the license key. Paste in the license key.

#### Step 5: Mail-in database

The database can be set up as a mail-in database. When configured, this allows emails to go directly into the systems Inbox where users with the Resolver role can deal with them accordingly. Please refer to your IBM Lotus Domino Help Guides for information on how to set up a mail in database.

#### Step 6: Database settings

Please refer to the sections below to assist with configuring the database to meet your organisation's needs.

## ACCESS CONTROL SETTINGS

The database should have 2 roles:

Admin  
Resolver

Give the Admin role to people or groups to allow access to the settings area of the database. Without the role users will not be able to see the Settings menu dropdown which allows access to the settings and categories. In addition, should Service Desk not have a valid license key, only users with the Admin role will be able to enter the key.

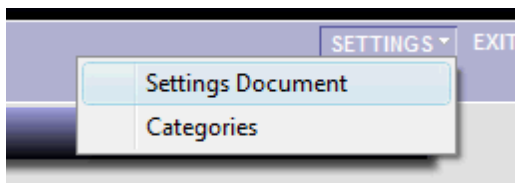
Give the Resolver role to people or groups to allow access to the Mail Management, Service Requests, Tasks, Assets and Customer profiles sections i.e. those users that will be responding to service requests. In addition, on entry to the database, users with the Resolver role will see a dashboard containing service requests and tasks assigned to that user.

Users can be in both roles.

Note that users without the Resolver role will only see service requests submitted by them on entry into the database.

## ASSETS

Use of assets is optional. Assets refer to equipment items, for example a PC. If the service desk requires to track assets, then this can be made available through the main settings menu.



<< BACK EDIT

### SETTINGS

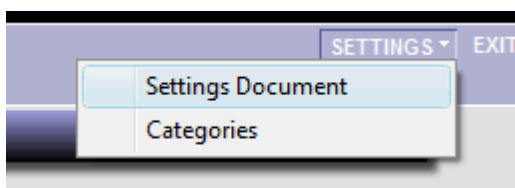
Company Name	The Salvation Army - Evaluation
Name of Service Desk	Salvation Army
Do you wish to use the integral asset register?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Use Lotus Notes Name and Address Book (Domino Directory) for Customers?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Is HTTP loaded on the server? (If yes, then graphs are available on the General Dashboard)	<input checked="" type="radio"/> Yes <input type="radio"/> No
HTTP Server URL eg: http://domino1.example.com	http://example.com
Service Desk Email Address eg: support@example.com	support@example.com

Once enabled, users with the 'Resolver' role will be able to see a menu item for 'Assets'. In addition, within service requests documents, resolvers will be able to select assets to associate service requests to particular assets.

If you have a current list of assets and wish these to be imported into Service Desk then please ensure you have these in a spreadsheet format or similar and contact Polymorph for assistance.

## CUSTOMERS

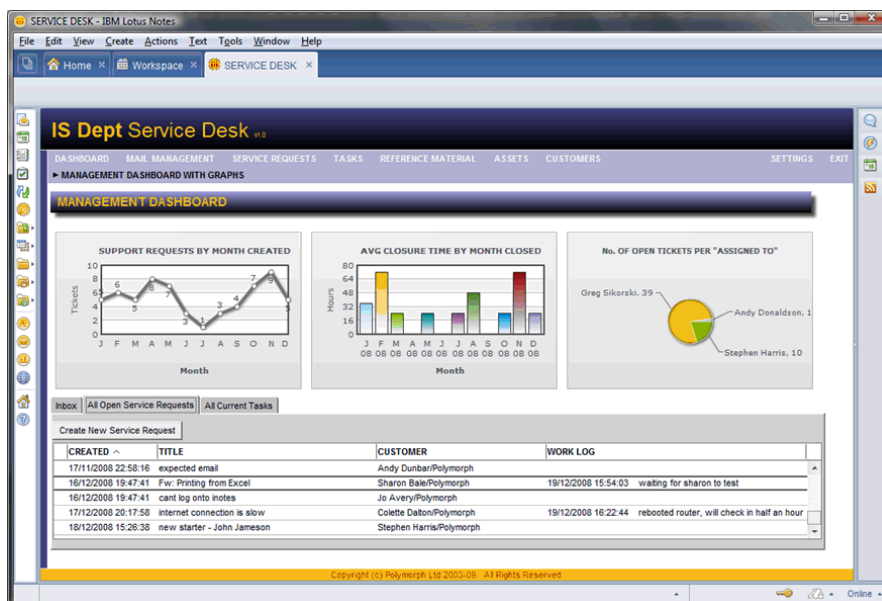
The system associates service requests with customers. The customer list can either be from the Domino directory or by using a custom list managed within the database itself. In a similar way to assets, this is a 'yes / no' option within the main settings document.



## GRAPHICAL REPORTING

The way the charts work is that the first time the graphs are loaded, a few small files are downloaded from the database to the users PC's temp folder.

There is no specific configuration requirements for graphs.



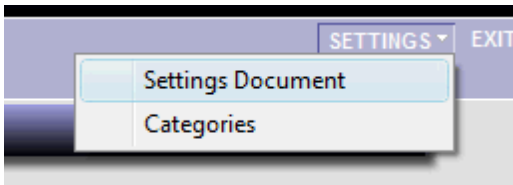
## CATEGORIES

Each service request and reference material document can be given a category to help define the type of service request or reference document.

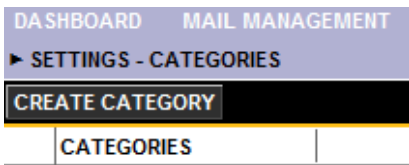
Categories can be up to 5 levels deep. For example:

Level 1: Hardware  
 Level 2: Server  
 Level 3: File and Print

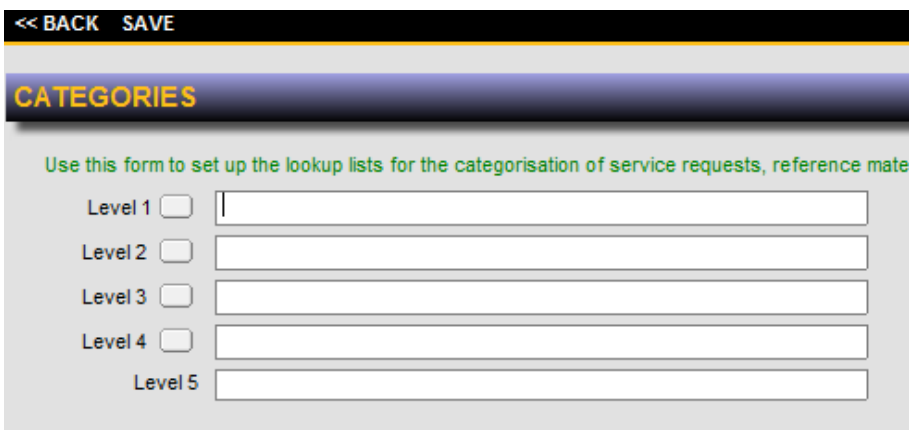
To set up the categories, select 'Categories' from the Settings menu:



...and then click the 'Create Category' button.



You will be presented with a form similar to:


 A screenshot of a form titled 'CATEGORIES'. At the top left, there are buttons for '<< BACK' and 'SAVE'. Below the title, there is a green instruction: 'Use this form to set up the lookup lists for the categorisation of service requests, reference mate'. The form contains five rows, each representing a category level. Each row has a label 'Level 1' through 'Level 5' followed by a small square checkbox and a text input field.

Enter the categories and save the document. You can create as many categories as you wish, each being up to 5 levels deep.

# Helpdesk **PRO**

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HelpDeskPro is the 'big brother' version of the Service Desk product. For businesses requiring advanced features such as:

- Web based portal for end users / customers and technicians
- Integration with Blackberry and other mobile devices
- Integration with MS-Word and MS-Excel for reporting purposes
- Contract management features for supporting different businesses
- Management of service level agreements
- Integration with email for various auto-notifications
- Support for ITIL change management processes, problem management and advanced asset management including integration with network discovery tools
- ...and many more

...then a review of HelpDeskPro would be recommended. Businesses wishing to start on Service Desk can upgrade to HelpDeskPro at a later date painlessly.

For more information please visit [www.helpdeskpro.co.uk](http://www.helpdeskpro.co.uk)