



GFI HelpDesk

GFI HELPDESK STAFF GUIDE



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1 Introduction

GFI HelpDesk is an enterprise-grade on-premise service desk software built on the powerful Kayako helpdesk software. GFI HelpDesk can be hosted in the customer's own infrastructure, on-premise, or in any public cloud infrastructure that supports MySQL/MariaDB and PHP 7+.

GFI HelpDesk was built to enable flexibility and increase productivity. Various tools and workflows are available to automate follow-ups and reminders for support agents. Agents can collaborate on tickets using notes and have all customer's information that is required to resolve a ticket at their fingertips. Predefined responses can speed-up reply times to increase agents' productivity.

GFI HelpDesk is easy to install on a variety of platforms and systems. It can also be branded to the requirements based on the desired look and feel as well as very easy to use by support agents with little training required.

GFI HelpDesk also lets you keep customers informed with news, knowledge-based articles as well as instinct answers to queries enabling fewer support tickets for easy and known answers.

GFI HelpDesk provides a powerful query engine KQL that can be used to access data and measure customer satisfaction, track team performance, and use all the data to understand your customer support experience. Various pre-built reports are available to measure the progress with one click. Additional reports can be built using KQL.

2 Using GFI HelpDesk

GFI HelpDesk helps you set up a cutting edge customer support system. There are tools and workflows available to automate follow-ups and reminders for support agents.

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2.1 Quick start guide

Get to know GFI HelpDesk with guides to the interface, key features, and common workflows.

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2.1.1 Understanding user types and interfaces

You are on your way to delivering amazing support to every one of your customers. This guide is designed to help you get familiar with the basics and hit the ground running.

By the end of this section, you will know how GFI HelpDesk is organized, where to find each tool and section, and what to do there.

Meet user types:

There are three (3) types of user in GFI HelpDesk: admin (that's you), staff and the end user. Each has their own home:

User type	Their area	Where to find it
Administrator user	Admin control panel	yourname.gfihelpdesk.com/admin
Staff user	Staff control panel	yourname.gfihelpdesk.com/staff
Your customers (end users)	Support center	yourname.gfihelpdesk.com

An admin user is a staff user, but with admin privileges, which means they can access the admin control panel.

You can set up most of your helpdesk in the admin control panel. Then you can head over to the staff panel to begin handling your customers and resolving tickets.

Meanwhile, your customers can use the support center to browse self-service content, submit new tickets, review their previous tickets and start live chats.

The areas of your helpdesk

Below are the areas of your helpdesk:

Admin control panel

An admin user is essentially a staff member with additional privileges. In the admin control panel, they can:

- » Add new teams and staff
- » Create new departments

- » Set permissions, restrictions and rules
- » Customize the support center
- » Add custom statuses, priorities and types
- » Manage rules, workflow, and automation

Staff control panel

Anyone in your team who needs to talk with customers and manage the helpdesk needs a staff user account. Not all staff members are created equally, though. As an admin, you can set rights and restrictions for other staff members.

In the staff control panel, your team can:

- » Correspond with your customers
- » Create tickets (send emails to customers)
- » Manage and resolve tickets
- » Manage customer accounts and organization profiles
- » Publish self-service content to the support center
- » Review live chat transcripts and call recordings
- » Run reports

Support center

The support center is the customer-facing touchpoint of your helpdesk. In the support center, your customers can:

- » Submit new tickets
- » Track and update their existing tickets
- » Start live chats
- » Get answers from your self-service content

Using the support center is optional: you do not have to force your customers through it. Customers can reach you via the helpdesk through email, live chat widgets, and phone without needing to use the support center.

Some GFI HelpDesk customers prefer to make the helpdesk transparent to the customer, others prefer to use the support center and provide a go-to support portal for their customers.

The apps

Kayako Desktop

Kayako Desktop is a Windows application which your team uses to connect to the helpdesk and use GFI HelpDesk's real-time support features: visitor monitoring, live chat, and voice.

[Download Kayako Desktop](#)

Getting help and support

From the team: You can get in touch with our team at any time: please [contact support](#). We are available all day during the week and offer limited support over the weekend.

Community forums: Posting on the community forums (forums.gfi.com) is a great way to talk to and learn from hundreds of other customer service pros and helpdesk admins. Official support (that is, responses from the GFI HelpDesk team) is not guaranteed here. If you want support directly from the GFI HelpDesk team, please contact us directly.

2.1.2 Setting Up Your Team in GFI HelpDesk

To really get a feel for GFI HelpDesk at work, we suggest inviting your team members to join. You can then go through your customer service process together as a team. Try to involve at least one person from each team at your company, so each of them can bring a different perspective to the table when you set up your workflows.

In this topic, you can learn how to set up your team in GFI HelpDesk.

Each staff user belongs to a team, that is why you need to create your teams first - and then add staff users to them.

Create a new team

To create a new team, do the following:

1. Go to the Admin Control Panel, click on **Staff** and then **Insert Team**.
2. At this point, you can assign the new team to **Departments**, which gives members of this team access to the tickets and live chats in those departments.
3. In the next tab, you can set individual permissions for members of this team.

Note:

Access control in GFI HelpDesk is very powerful: you can control who can see, create, edit and delete most things in GFI HelpDesk.

We recommend leaving the defaults at this stage until you get familiar with GFI HelpDesk.

Add staff users

To add a new staff user, do the following:

1. In the Admin Control Panel, click **Staff** and then **Insert Staff**.
2. Fill in the essentials under the **General** tab.

Remember your staff teams: if you enabled **Administrator team** for one of them, any staff users you add to that team is able to access the admin control panel.

3. Under the **Assigned Departments** tab, you can either have this staff user inherit the department permissions from their team, or you can override them for this individual.

Note:

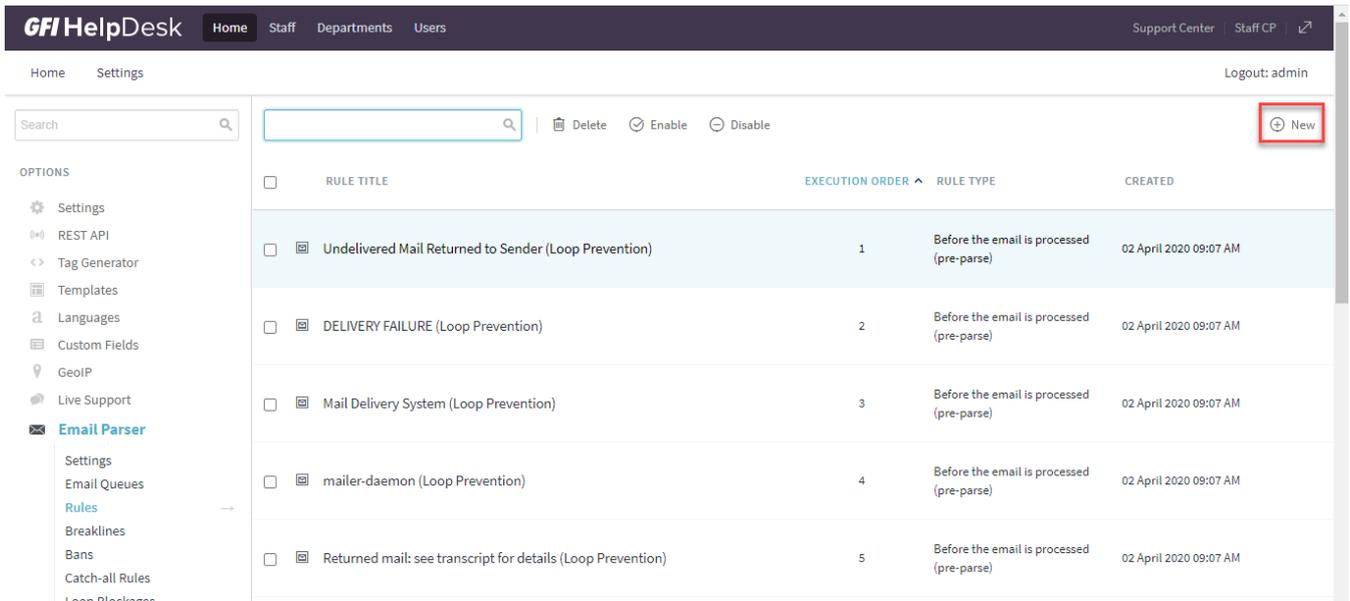
We recommend sticking to the defaults while getting started.

2.1.3 Guide to automation with GFI HelpDesk

Automated ticket rules are designed to minimize repetitive clicking and to keep you from typing out the same old messages over and over. In fact, when you implement rules, they do much of the admin work for you, freeing you up to focus on your customers.

We use email rules to help a ticket make its way to the right place from the moment it arrives in the e-mail queue.

To create a new email rule, click on **Rules** under **Mail Parser** on the **Options** menu. It looks like this:



Screenshot 1: To create a new rule

Autoresponders

Autoresponders are automated emails sent to customers as a record of each ticket they submit in the support center. We generally suggest including key information, including ticket ID, Subject, Status and a direct link to the ticket, but you can also include Department, Type, and Priority of the ticket.

In addition to that, the other popular ways to use autoresponders are:

User Registration emails- to confirm and activate their support center account

Survey emails- to let customers rate their support experience

Notifications- to let staff users get these alerts when specified ticket or user actions occur

News Subscriptions- to alert customers whenever a new article is added to the helpdesk

Auto-close- to alert customers that an idle ticket has been closed (this can also be set to simply downgrade a ticket status)

To create an autoresponder template, click on **Templates > Manage Templates > Tickets > email_ autoresponder**

Use macros to reply to tickets

Macros are a powerful way to speed up ticket resolution by automating actions that you find yourself making very frequently. Ticket macros are 'predefined replies' taken to a new level.

With macros, you can quickly answer commonly asked questions using pre-written responses and pre-select ticket actions and move tickets through more quickly through the support process.

For example, we find ourselves referring tickets frequently to the finance department. Instead of informing the customer that their ticket is being transferred, transferring the ticket and changing the priority of the ticket...let's use a macro.

First, automate the move to finance by creating a macro called Move ticket to finance. This macro changes the ticket department to **Finance**, set the ticket priority to **Medium** and add a message in the reply area.

In the staff control panel, go to **Tickets > Macros**. Click on the **Insert Macro** button.

To use a macro, click on the **Reply** tab of a ticket. Above the ticket properties bar, find the **Macro selector**.

When you select a macro, two things happen:

- » The ticket reply area fills up the content you specified when creating the macro
- » The ticket properties bar is pre-selected with any ticket properties you specified when creating the macro

None of these things are saved or sent automatically. All the macro is doing here is filling in and selecting fields, so make sure to hit the **Send** button to save the ticket's property changes.

You can use this process to apply more than one macro (to combine a bunch of pre-written replies, for example).

Canned responses

A canned response is very much like a predefined reply, except we use them in live chats (via GFI HelpDesk Desktop) instead of email.

This comes in handy, because text messages, images, URLs or code, can all be used as canned responses.

To create a canned response, first add a category or two by clicking **Insert Category** under the **categories** tab. Then go ahead and click **Insert Response** under the same tab.

Visitor rules

Visitor rules are designed to automate the ID, group and mine information from visitors to your website. With this information, you can automatically offer a chat with visitors, who have browsed certain pages or have spent significant time on your site.

Rules take the repetitive work out of your hands, while still helping you help your most promising leads while you're fresh in their minds.

These are the two major ways you can target a visitor with visitor rules:

- » **When a visitor first enters your website**- rules are checked once when the visitor opens up the site.
- » **Each page a visitor opens**- rules are checked on every page load during a visitor's session.

To set up a visitor rule, find its section under the live support tab in the admin control panel.

Auto-close a ticket

We can automatically close unresolved tickets that haven't been touched or updated a specified period of time.

From this page, you can create, delete, enable or disable auto close rules.

Bonus: mail parser rules

Helpdesk parser rules can also determine department changes, which tickets are marked as spam, ticket priority, ticket status and so on. For this reason, this is a powerful automation tool.

For more information on mail parser rules, see [Mail parser rule essentials for setting up email rules](#).

2.1.4 Guide to setting up archiver custom app in GFI HelpDesk

The Archiver custom app allows you to delete/export old data in GFI HelpDesk. It gives an extension to the Maintenance menu in the admin panel.

The additional menu items provides an option to purge/export the old data for a specific user or a complete database. The custom app deletes records permanently, so it is highly recommended to keep database backups.

You must have an on-premise installation of GFI HelpDesk with the full access of source code. The code files of this custom app is placed under the installation folder of GFI HelpDesk and further, it needs to be installed as a plug-in under the Apps section in the admin panel.

In this topic, you can go through the steps necessary for installing Archiver custom app under the GFI HelpDesk installation, on your own server.

Downloading, unpacking, and uploading the product files

The first part of the installation process is to download the product files from [here](#), extract the Zip file on your server machine where GFI HelpDesk is installed, and upload them from there to your server:

Further, copy the src directory to the __apps directory of GFI HelpDesk installation, rename the src folder to archiver, navigate to the admin portal (Apps section) in your web browser.

APP DETAILS	INSTALLED VERSION	LATEST VERSION
 INSTALLED Reports	4.91.3	4.91.3
 INSTALLED News	4.91.3	4.91.3
 INSTALLED Knowledgebase	4.91.3	4.91.3
 INSTALLED Troubleshooter	4.91.3	4.91.3
 INSTALLED Tickets	4.91.3	4.91.3
 INSTALLED Mail Parser	4.91.3	4.91.3
 NOT INSTALLED Archiver	- NA -	1.0
Adds a new item to the Maintenance menu that allows administrators to delete/export old data in Kayako. This will permanently delete records! Be sure to keep database backups.		
Author: Werner Garcia		
 INSTALLED Live Chat	4.91.3	4.91.3

Screenshot 2: Navigate to the Apps section

Click on the **Archiver** link and install the plug-in.

Archiver

 Install  Back  Help

App Title Archiver

Description Adds a new item to the Maintenance menu that allows administrators to delete/export old data in Kayako. This will permanently delete records! Be sure to keep database backups.

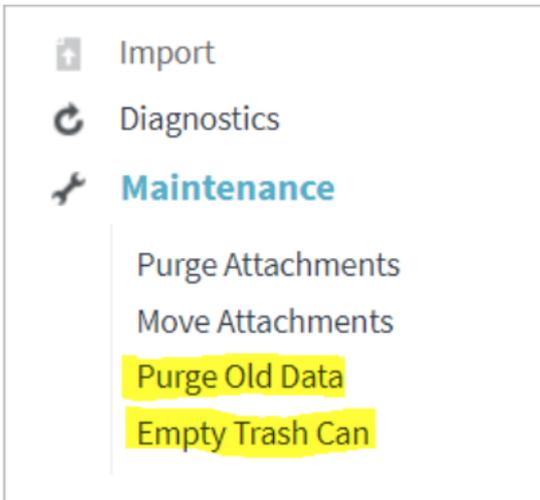
Author Werner Garcia

Installed Version - NA -

Latest Version 1.0

Screenshot 3: Click Archiver

Refresh and invalidate your browser's cache, so the new menu items are visible under the **Maintenance** menu in the **Admin** panel.



Screenshot 4: New menu items are visible

Purging old data

Here you are allowed to search for tickets created in a specific date period, and if specified, belonging to a particular user.

NOTE:

It is a best practice and highly advisable to keep regular database backups.

Purge Old Data

Search Help

Warning

Read before continuing

This tool can make your system unusable if you don't know what you're doing.
Remember to always make a backup of your data before deleting any records!

Email

Provide an email to narrow search only to tickets belonging to a single user (leave blank to fetch all tickets)

Start Date  

Start of date period to search for old data

End Date  

End of date period to search for old data (default to 3 months ago)

Page Size

Number of items per page in search results screen

Screenshot 5: Search for tickets belonging to a user

Leave the email field empty to search tickets belonging to all users. GFI HelpDesk shows a list of records that you can review before performing any action. The export option offers you a MySQL dump file and compresses it into a ZIP file to make a compressed low sized file.

Purge Old Data

"6" Tickets Found
 Search found 6 tickets based on the criteria provided

TICKET ID	DEPARTMENT	STATUS	USER NAME	SUBJECT
2	-Trash-	Open	Kayako Admin	ticket 2
3	-Trash-	Open	Kayako Admin	ticket 3
4	General	Open	Kayako Admin	Ticket 4
5	Sales	Open	Kayako Admin	ticket 5
6	Marketing	Open	Kayako Admin	ticket 6

Page 1 of 2

Screenshot 6: List of tickets

It is advisable to export data before using the delete option. After hitting the **OK** button on the warning dialog box, the task progress window is displayed.

Purge Old Data

100.00%

Processing Table		swtickets	
Tables Processed	22	Total Tables	22
Rows Processed	28	Total Rows	28
Time Elapsed	3s	Time Remaining	0s

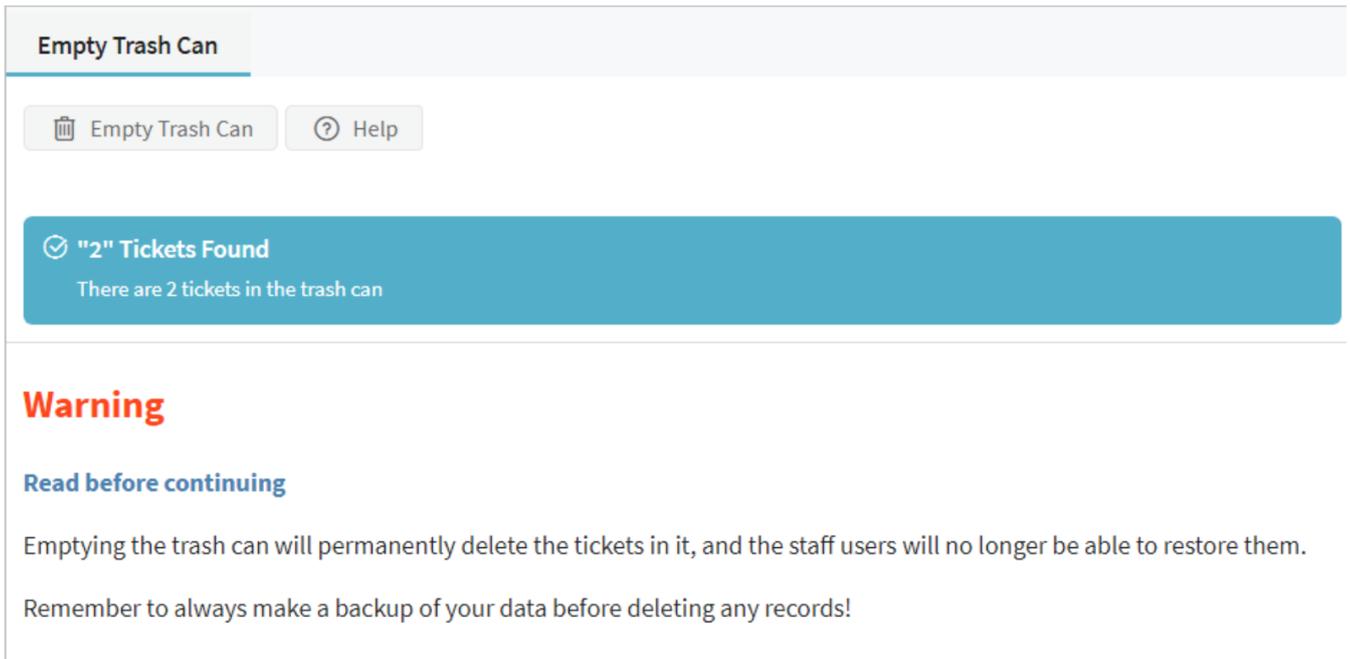
Screenshot 7: Task progress window

Emptying trash

You can delete all the tickets stored in the Trash by the staff users.

Note:

These tickets cannot be recovered after the deletion.



Screenshot 8: Emptying trash

After hitting the **OK** button on the warning dialog box, the task progress window is displayed.

2.1.5 Guide to managing support tickets

In GFI HelpDesk, all of your customer conversations are tracked as tickets (you might also know them as support tickets, support requests or incidents).

Any message which comes into the helpdesk – whether from the web, the support center or email – is tracked as a ticket, keeping everything related to a conversation in one place.

Know the ticket basics

Departments

Tickets belong to departments. A department is like a folder for tickets: tickets can only belong to one department, and you can assign staff teams or individual staff users to departments, which allows them to access and manage tickets in that department.

Typical departments might include *Sales, Support, Opportunities, Bugs* and *Receipts*.

Departments can be public or private: if a department is public, it means your customers can select that department when creating a new ticket in the support center.

Ticket properties

A ticket has various ticket properties which let you manage incoming requests effectively and build a speedy workflow.

Property	Examples	Description
Type	Issue, Feed-back, Bug, Lead	A ticket type usually indicates the type of ticket, to label tickets with something specific to their content or context. Which ticket types you create depends on your organization. Some GFI HelpDesk customers like to use ticket types for improved reporting and analytics: for example, the nature of an Issue type ticket may well be different to a sales oriented Lead ticket.

Property	Examples	Description
Status	Open, On Hold, Closed	A ticket has a status, which represents where the ticket is on its journey towards resolution. Typically, tickets come in to the helpdesk as Open, are set to On Hold while you're waiting for a response from the customer and are set to Closed once the ticket has been resolved. You can create custom statuses to suit your own workflow.
Owner		Tickets can be assigned to individual staff users (who then become owners of the ticket), which usually means that individual takes responsibility for the ticket.
Priority	Low, Medium, High	Ticket priorities are fairly self-explanatory. You can create custom priorities to suit your own workflow, and also allow your customers to select their own priority when creating their own tickets (useful because you can configure GFI HelpDesk to trigger different notifications depending on a ticket's priority as well as other properties).

How your customers create tickets?

Using the support center

By default, your customers can submit new tickets in the customer-facing support center (yoursupportcenter.gfihelpdesk.com).

Your customers can select the department to create the ticket in, as well as a priority, subject, message and file attachments.

This is highly configurable: you can create custom fields to capture specific pieces of information from your customers (more about that below), determine which departments they can select, whether or not they can select their own priority or whether they can create their own tickets at all.

If you have started building your knowledgebase, GFI HelpDesk automatically searches for and suggest answers to your customers as they type out their enquiry (reducing the number of incoming support requests, increasing customer WOW!).

Email

You can connect your GFI HelpDesk helpdesk to any number of POP3 or IMAP mailboxes to bring email into the helpdesk from across your organization.

By bringing your organization's email into the helpdesk, you can enable your team to distribute and collaborate on tickets in one place, rather than managing lots of separate mailboxes and email addresses.

GFI HelpDesk takes care of all the message processing automatically: determining what is a reply to an existing conversation and should be added to an existing ticket, which emails should create a new ticket and whether an existing ticket should be reopened. You can also use GFI HelpDesk's powerful email parser rules to automate the routing of email and tickets.

Find out more about fetching email into GFI HelpDesk below.

API

You can use the GFI HelpDesk REST API to automatically create tickets on behalf of anyone - whether generated by your backend systems or other integrated apps.

Find out more about the GFI HelpDesk at REST API.

Reply to a ticket

This can happens in the staff control panel (yourhelpdesk.gfihelpdesk.com/staff)

Here, your team can review, assign, reply to and manage tickets. Your team can also create tickets (in effect, sending an email to a customer) or create tickets on a customer's behalf (for example, if you want to record the details of a phone conversation or ask someone to follow up with the customer by email at a later date).

On the left hand side, you can see the **department tree**. This lists all of departments you have been assigned to. Click on status under each department to view the tickets in that department and set to a particular status.

Above the department tree, there are a shortcut filters.

- » **My Tickets** shows you all of the tickets which are open and are assigned to you.
- » **Inbox** shows tickets which are open.
- » **Unassigned** shows tickets which are open and not yet assigned to anyone.

Open a ticket and click on the **Reply** tab to start composing a reply. At the same time, you can change the ticket's properties (like the status and priority) which is saved once you send the reply.

Fetch email into GFI HelpDesk

You can connect GFI HelpDesk to any number of POP3 and IMAP mailboxes using Email Queues, which are responsible for:

- » connecting to the mailboxes
- » fetching email
- » processing the email into tickets

Find Email Parser in the admin control panel (yourhelpdesk.gfihelpdesk.com/admin) and then click on **Email Queues**. Click on **New**, and then follow the steps to connect your mailbox.

For more information, see Introduction to email queues.

Custom fields

GFI HelpDesk's powerful custom fields builder helps you customize various forms across the helpdesk - including the new ticket form - allowing you to make sure the right information is collected from customers to equip your team to answer customer enquiries quickly.

To create a custom field, find Custom Fields in the admin control panel. First, create a custom field Group to organize your custom fields. In this example, we have group called Product information and various fields to collect information about a customer's product.

For more information, see Introduction to email queues.

Bonus: Turbo charge your tickets

GFI HelpDesk is ready to go out of the box. While we've quickly gone through the basics, there is a lot more GFI HelpDesk can do to turbo charge your support and enable your team to improve customer satisfaction.

If you're ready to dive in, we suggest starting here:

- » [Configuring SLA plans to set reply and ticket resolution deadlines](#)
- » [Ticket macros to speed up ticket responses](#)
- » [Customizing ticket views and filters in the staff control panel](#)

2.1.6 Building your knowledge base

The Knowledge Base is a library designed to help your customers answer their own questions with standard information, how-to's, and instructions.

Your self-service resources is so helpful that your agents can help customers with more inquiries that need their personal attention.

Some of our most successful customers have grown theirs into extensive libraries by adding just one to two articles at a time.

Create categories

The knowledge base is organized entirely by category for easy viewing. You can start an article with inbuilt Root category or create a new category by clicking Insert Category.

Once you have established this, you can go on to do the following from this page:

- » Insert a sub-category
- » Insert a new article in a category
- » Filter articles within a category

Publish an article

To create a new article:

1. Click **Knowledgebase** on the navigation bar.
2. Choose **New Article**.

Notes:

- » When you are drafting an article, remember to hit **Update** early and often to save your work.
- » You can place this article in multiple categories, which comes in handy when you are creating multiple guides with overlapping information.

Moderate comments

- » Customers can rate and comment on knowledge base articles, which you can moderate in the admin + staff control panels.
- » If you encourage your customers to do this (and you should), it becomes a valuable source of direct feedback for improving or retooling your articles.
- » By default, the comments are not published to your knowledge base until a staff user approves.
- » Finally, there are three things you can do with a comment: approve, reject, or mark as spam.

Publish news or announcements

Use the **News** section to publish news and announcements for your customers to see when they log into the helpdesk. Every time you publish a new announcement, you can have an automated email sent to every customer who subscribes to this feature.

2.1.7 Helping your customers submit tickets

This topic provides a starting point for helping your users submit their first tickets through your support site. The sections below covers the basic steps your users needs to follow to get started. Since every GFI HelpDesk-powered support site is different, the steps and screenshots below may vary from what your users experiences.

This guide is designed as a starting point, which you can modify to suit the particulars of your support site.

Note:

Everything below is directed at the end users of your support site. Feel free to copy this article and edit it to fit your needs.

To make it easier to reach out to our support team, we have put together this guide to help you get started. Below are the instructions for creating an account, as well as submitting and tracking your support requests.

Creating an account and logging in

The first step is to register for an account on the support site. This lets you log in and submit tickets to our support team.

To create an account:

1. Open your web browser and visit <support.yourcompany.com>.

Note:

It is useful to bookmark the site so you do not have to type it in every time.

2. Click the **Register** button. It should look like this:

Create a new account

Please fill in the fields below to register a new helpdesk account.

General Information

Full Name:	<input type="text"/>
Email:	<input type="text"/>
Password:	<input type="password"/>
Password (repeat):	<input type="password"/>

I consent for Kayako to process my data and agree to the terms of the [Privacy Policy](#)

CAPTCHA Verification

Please enter the text you see in the image into the textbox below (we use this to prevent automated submissions).

ee71 dg 1 z

Register

Screenshot 9: Create account

3. This takes you to a form where you can fill in the details for your user account.
4. Fill in your details, complete the **CAPTCHA** questions and click Register.
5. You receive an email to confirm that your account has been created. Open the confirmation email and verify your account.
6. Now, you are ready to log in.

Your next step is to log in to the site.

To log in to the support site

1. Switch back to the support site in your browser.
2. Go to the login form.
3. Enter the email address and password you used when registering on the site.

Note:

You are taken to a page where you can fill in details for your account profile.

4. Add any details you like, and click the **Update** button to save your changes.

Now you are ready to get in touch with our support team.

Submitting your first ticket

Requests to our support team are handled in the form of support tickets. This section walks you through the process of submitting a support ticket.

To create your first ticket:

1. Go to the front page of the support site and make sure you are logged in.
2. Click the **Submit a Ticket** button.

Note:

You can also click the Submit a Ticket link on the top navigation menu.

3. From here, you may fill in the details for your support request. We will go through each one step-by-step.
 - a. First, select a department to submit your ticket to. This tells our support team what your request is related to.
 - b. Click the **Next** button.
 - c. On this screen, describe the problem you are having. From the Priority pull-down, choose the option that best describes the problem you are facing. This is how we try to think about each priority level:

General Information

Priority

Your Message

Subject

Attach Files [+ Add File](#)

Screenshot 10: General information

- d. Next, in the Subject field, give us a brief description of what is happening.
- e. Then, in the big text area, go into details. The more specific you can get about what you are experiencing, the better.

Note:

Once you start typing in the description for your ticket, suggestions for knowledge base articles that might be relevant to your request appears.

- f. When you are done writing up your issue, you also have the option to attach a file (photo, screenshot, PDF, etc.) that helps illustrate your issue:
 - i. Click the **Add File** link.
 - ii. Click the **Choose File** button.
 - iii. Select the file you want to attach and click the **Open** button.
- g. Review the details of your ticket and click the Submit button at the bottom of the screen to send your request to our support team.

Once your request has gone through, you can see a confirmation screen. This means we have received your issue and someone on our team will be in touch as soon as possible.

Tracking and responding to existing tickets

Once you have submitted a ticket to the support team, you have two options for following up on it:

» **Option 1: Email**

In addition to receiving a confirmation email when we receive your request, you also get an email when we reply. You can simply reply to that email (without changing the subject line) and our support team receives your responses.

» **Option 2: Support site**

Alternatively, you can view and respond to any tickets you have open directly from the support site interface. Below, you can find instructions for using the support site to track your tickets.

To access your existing tickets from the **Support Site**:

1. Head to the front page and make sure you are logged in.
2. Click the **My Tickets** button.

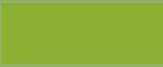
Note:

You can also click the **My Tickets** link on the top navigation menu.

3. A page with a table that lists all of your tickets opens. The table provides some basic information about the status of each ticket, but clicking on the ticket's subject gives you a much closer look.

Problems logging in

Created: 26 February 2016 12:49 AM Updated: 26 February 2016 12:52 AM
 Overall Satisfaction 

DEPARTMENT Support	OWNER Kelly 	TYPE [Private]	STATUS Awaiting Reply 	PRIORITY Normal 
-----------------------	--	---------------------	--	--

[Add Reply](#)

Frances
User

Posted on: 26 February 2016 12:49 AM NEW 

Every time I try to log in, I'm getting an error message that says 'Unrecognized user name or password'. I've tried resetting my password, but it hasn't fixed anything. What should I do?

Thanks,
Frankie

Kelly
Customer Support Rep
Staff

Posted on: 26 February 2016 12:52 AM NEW 

Hi Frankie,

I'm so sorry to hear you're having trouble logging in! We can definitely help you with that.

I know we've been having some trouble when people are trying to login from Internet Explorer. Can you tell me what browser you're using?

Thanks so much,
Kelly

Screenshot 11: Sample ticket

4. You can see at the top the **Department, Owner, Type, Status,** and **Priority** of your request. You have the option of modifying the last two options:

- » From the **Status** dropdown, if your problem has been resolved, you can select **Closed** at any time.
- » From the **Priority** dropdown, if your problem has gotten worse or better, you can adjust the priority here.

5. In addition, you can also see a complete history of your request, starting with your initial message at the top.

6. If your ticket is in need of a response, click the **Add Reply** above the conversation history.

7. A large text box opens up and you can type your response, as well as attaching any additional files that would be useful.

8. When you are done, click the **Send** button to submit your response.

9. You can come back to this page at any point to check in on the status of your ticket.

We hope this gives you a good introduction to submitting and tracking tickets from our support site.

If you have any questions, do not hesitate to contact our support team.

2.2 Support tickets

Brush up on building ticket views, defining custom fields, and managing GFI HelpDesk support tickets.

Topics in this section:

2.2.1 Viewing, sorting and filtering support tickets	24
2.2.2 Reusing common replies and updates using macros	29
2.2.3 Advance support tickets	31

2.2.1 Viewing, sorting and filtering support tickets

GFI HelpDesk has a multiple default options for looking at your queue. But sometimes they do not give you the perspective you are looking for. For those situations, ticket views and filters can get you the clarity you need.

By setting up views, which let you customize the columns and sort order for your ticket listings, and filters, which let you restrict which tickets GFI HelpDesk includes in the listing, you can look at any subset of your tickets you like.

Once you have created some custom ticket views, your team can quickly switch between them when looking at your queue. From there, they can also select a filter from the top menu, to further restrict which tickets are displayed.

Combining these two features lets you organize and prioritize your tickets based on virtually any ticket attribute.

This section explains how ticket views and filters work. You can also learn to create and configure your own views and filters.

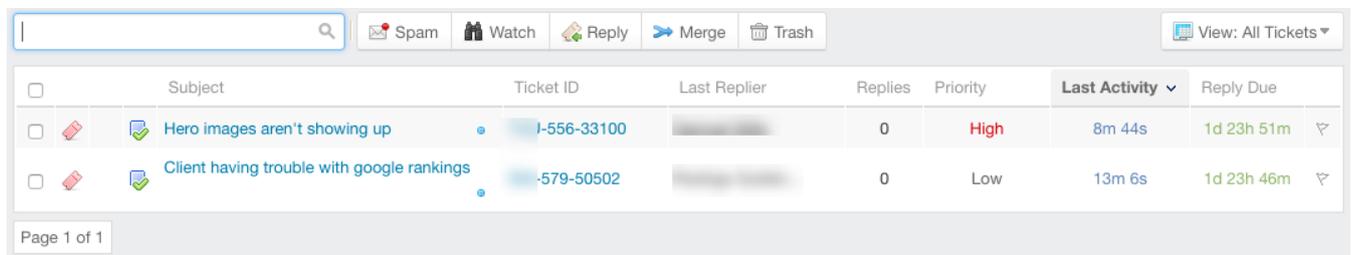
Understanding how views and filters work together

In addition to GFI HelpDesk's default ticket listings, you can create your own, custom listings that let you slice and dice your ticket queue in whatever way is most helpful to your team.

To get the most control over your queue, we recommend using a combination of two GFI HelpDesk features: views and filters.

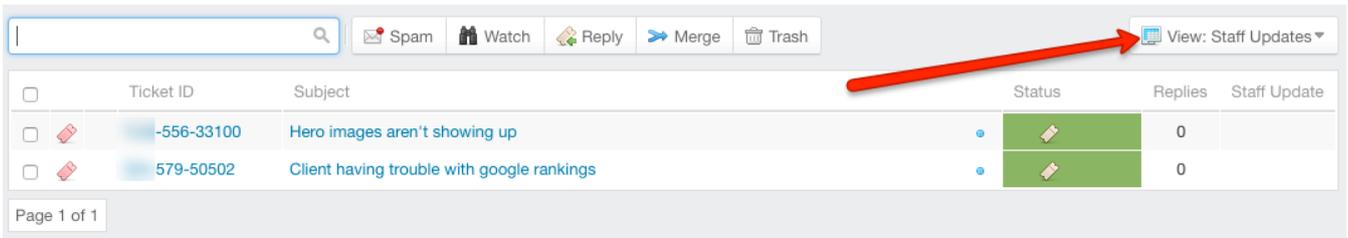
Let us take a quick look at what these features offer, and how they differ and complement each other:

» **Views** - Ticket views are a way to save a specific configuration of columns to show when you are looking at your tickets. So, for example, you might be looking at your Support department tickets from the default **All Tickets** view:



Screenshot 12: View:All Tickets

But maybe those columns do not give you quite the information you need, and instead, you want a simpler breakdown of your queue. You could create a custom view named **Staff updates**, which is then available from the View menu:



Screenshot 13: View: Staff Updates

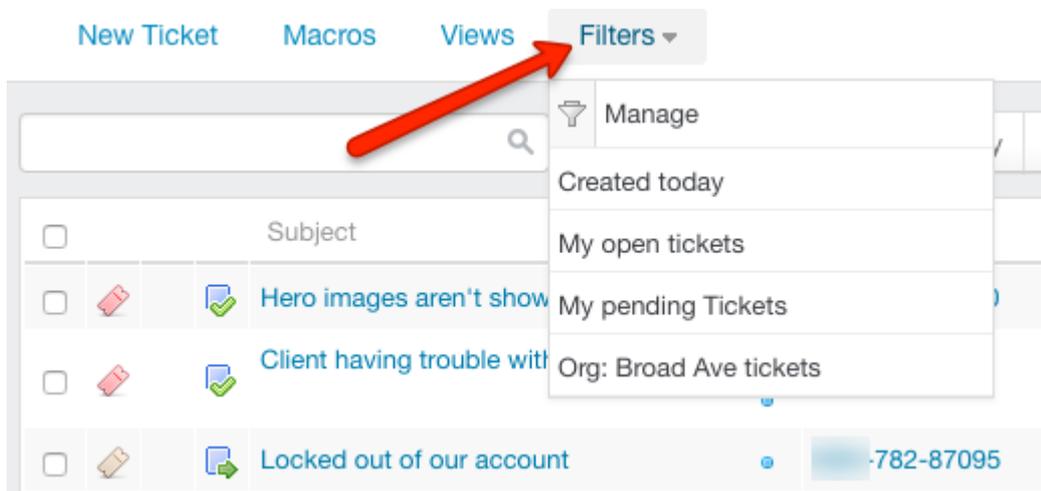
Views offer you a lot of flexibility in terms of not only what ticket information they display but also what default behaviors are associated with them. For example:

- » **Ticket assignment** - You can select whether your view should include all tickets, only tickets assigned to staff member using the view, or only tickets that haven't been assigned yet.
- » **Visibility** - You can choose how available to make the views you create, either by keeping them private, sharing them with your team, or sharing them with every staff member.
- » **Auto-assignment** - For each view, you can decide whether GFI HelpDesk should change the owner of a ticket to whichever staff member replies to or forwards it, or whether it should simply leave the original owner intact.
- » **Default reply status** - GFI HelpDesk can also automatically set tickets within a view to whatever status you choose, when someone responds to a ticket.

On the whole, views let you create a variety of lenses through which to view your ticket queue. From within each view, you can focus your attention even further, by adding:

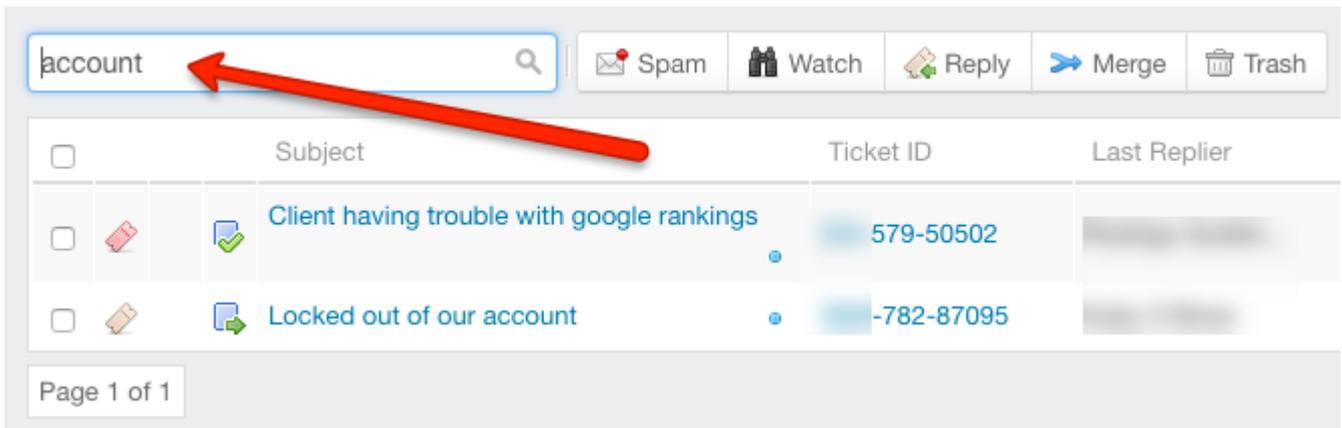
- » **Filters** - Filters are a much more compact feature than views. Each filter is a collection of one or more criteria that you can apply to any view in GFI HelpDesk. When the filter is applied, the view only displays tickets that meet the filter's criteria. Some useful applications for this include filtering by User Organization, by Ticket Owner, by Creation or Last Reply date, or by any number of other ticket attributes.

Once you have created a public filter, your team can select it from the top toolbar when looking at any ticket view:



Screenshot 14: Selected public filter

In addition to your saved filters, you can also quickly narrow down a view, using the quick search bar at the top of the ticket grid. GFI HelpDesk searches every ticket attribute for your search string and display the results.



Screenshot 15: Using quick search bar

So, between views, filters, and quick searches, GFI HelpDesk has options to help you quickly hone in on any particular subset of your ticket queue that you want to see.

Creating a new ticket view

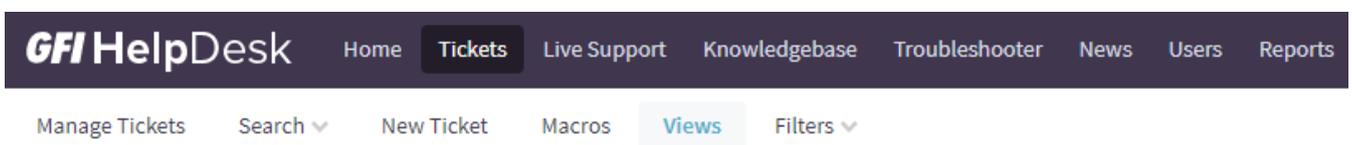
Views are created from the Staff Control Panel. Once view is saved it is available for you and your teammates from the Views dropdown,, depending on the visibility option you select.

NOTE:

To create or edit views, you need a Staff Account with the 'Ticket views' permission.

To create a new ticket view:

1. Sign in to the Staff Control Panel.
2. Click on **Tickets > Views**.



Screenshot 16: View navigation

3. On the next page, you can see any views that you have already created. To create a new one, click **New** on the top right.
4. First up, you want to add a descriptive **Ticket view title** so your staff knows what they are getting when they select a view.
5. From the **Display tickets assigned to** section, select the types of tickets the view should include.
6. Next, choose the **Visibility** level for the view to share it with other staff members or keep it to yourself.
7. To use this view as the default for one or more departments, check the box next to them in the **Link this view** with departments section.

NOTE:

If there are two views linked to the same department, the view that was most recently linked is the default.

8. Switch to the **Options** tab to set some default behaviors associated with the view.

9. From the **Tickets to display per page** option, set a number of tickets to display before breaking onto a new page.

NOTE:

The number you set here cannot exceed the global page limit specified in the admin control panel.

10. Choose how often, if at all, you want to **Automatically refresh the ticket listing**.

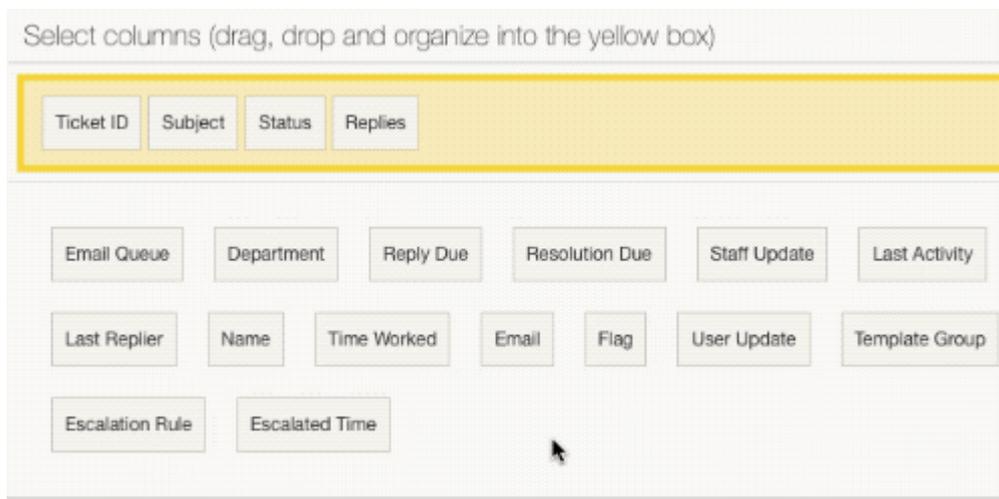
11. To automatically reassign any ticket in this view to whoever replies to or forwards it, set **Automatically set ticket owner to active staff user** to **Yes**.

12. From **Default ticket status when replying to a ticket** select which status tickets should have when a ticket is forwarded or replied to.

13. Select a default action you want GFI HelpDesk to take **After a ticket has been replied to**. You can opt to be directed to a few different views or tickets.

14. Next, switch to the **Columns** tab, where you can choose the columns that define your view.

15. First, skip down to the bottom of the page, and drag and drop the columns you want to see into the yellow box.



Screenshot 17: Drag, drop and organize into yellow box

16. Add as many columns as you like, and rearrange into whatever order suits the purpose of your view.

NOTE:

If you have created any custom fields, you'll be able to add them as view columns.

17. When you have your columns selected, select a default **Sort by** column, and whether the **Sort order** should be 'Ascending' or 'Descending'.

NOTE:

You can sort your view on the fly as well, by clicking the column headers.

18. When the view is configured, click **Insert** on the toolbar.

At this point, your team can start using this view whenever they want, by selecting it from the **Views** dropdown.

Your ticket details

If you are reporting a problem, please remember to provide as much information that is relevant to the issue as possible.

General Information

First and Last Name

Email

Priority

Product Details

Product:*

Please select the product make and model you need help with.

Serial Number:

Please enter your serial number. (Usually found on a label on the back of the machine.)

Screenshot 18: Use newly created view

Adding ticket filters

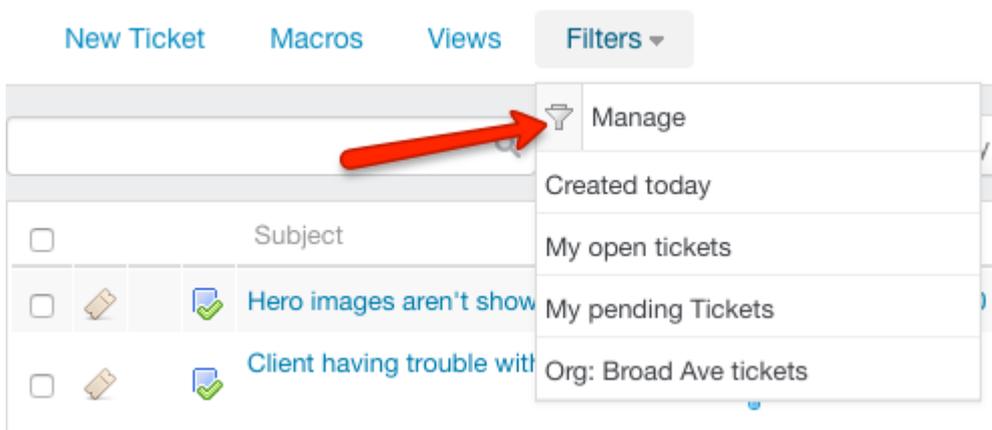
Filters can be simple or complex as required. You can add a single ticket criteria, or you can add an assortment of them. You also have a few options to control whom the filter is available to.

NOTE:

To create or edit views, you need a Staff Account with the 'Ticket filters' permission.

To create a new ticket filter:

1. Sign in to the Staff Control Panel and go to **Tickets > Filters**.
2. From the menu, click **Manage**, to go to a page with a list of any existing filters.



Screenshot 19: Managing filters

3. Click **New** in the upper right.
4. Add a descriptive **Filter Title**, making sure to be explicit about what the filter shows you when you select it.

5. Choose whether to limit the filter's **Availability** to just you, or to **Restrict it to specific staff team** by selecting one from the dropdown.
6. From the **criteria** dropdowns, select what criteria a ticket has to match to be displayed in this filter.
7. To add more than one criteria, select either **Match all criteria (AND)** or **Match any of the criteria (OR)** and click **Insert Criteria**.
8. When you have your criteria set up, click **Insert** to save your filter.

You can now select this filter from on any ticket view in GFI HelpDesk.

2.2.2 Reusing common replies and updates using macros

Macros can be used if the support team needs to do the same task repetitively. It can be performing an action or sending a reply.

Macros can save your team a lot of time by automating common replies or making common updates to support tickets. Macros can also help keep your tone consistent across replies from multiple members of your staff.

This topic provides useful information about the different actions that macros can perform. Also you can learn the steps for creating and using them.

Understanding what you can do with macros

Unlike traditional canned response macros, GFI HelpDesk macros can do much more than saving reusable replies. In all, you can use macros to perform the following seven different types of updates:

- » **Add reply content:** Adds text to the reply box. The text can be edited before you send a reply to your customer.
- » **Set ticket department:** Updates the ticket department, if you wish to move the ticket to another department.
- » **Set ticket owner:** Assigns the ticket to a specific staff member. You can also unassign a ticket using this action.
- » **Set ticket type:** Updates the ticket type.
- » **Set ticket status:** Updates the ticket status.
- » **Set ticket priority:** Updates the ticket's priority.
- » **Add tags to the ticket:** Adds any tags you specify to the ticket. You can add as many tags as you like.

You can also use a single macro to make updates to any number of combination of these ticket attributes.

So, for example, let's say your support team is getting a lot of requests coming in about the billing on their account.

- » The replies to these requests are nearly identical, regardless of which customer they're talking to.
- » Plus, each of these tickets needs to get reassigned to a particular team member in the Billing department, along with a couple of updates to the ticket's attributes.

By creating a new Move ticket to Billing macro, you can capture all of those updates, and the standard reply text and make it available so that anyone on your support team can use it when replying to a ticket.

So, now that you have a sense of what you can do with macros, let's look at actually building one.

Creating and organizing macros

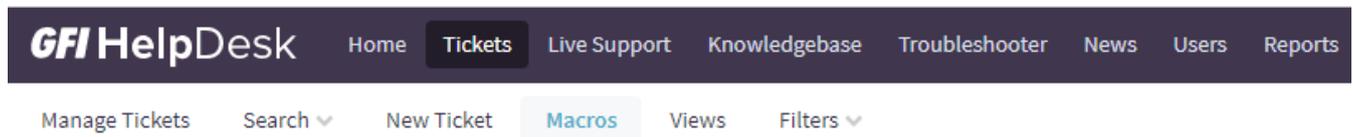
You can create as many macros as you need. If you start using them widely across your team, it's also useful to group them into categories, according to team or purpose or whatever makes the most sense for your team. We'll go through creating both macro categories and individual macros below.

Note:

To create or edit macros, you need a staff account with the Ticket macros permission.

To create a new macro category and macro, follow the steps given below:

1. Login to the GFI HelpDesk staff control panel.
2. Go to **Tickets > Macros**. List of existing macros categories are displayed.



Screenshot 20: Navigation for macros

3. To create a new category click **Insert Category**.
4. In **Category name**, add a descriptive title for the category. (For example - "Ticket assignments.")
5. Leave **Parent Category** blank. (As this is used as a top tier category).
6. Leave **Availability** set to **Public**. (To share this macro with others).
7. Leave **Restrict to specific Team** list set to **All Staff Teams**. (So that the whole team is able to use it).

Note:

You can also limit the visibility of a macro to just yourself by making it private or to a specific team.

8. Click **Save** to create your new category.
9. To create a macro to move a ticket to the Billing department, click the **Insert macro** button.
10. In the **Macro Title** field, add descriptive title. (For example - "Move ticket to Billing.")
11. Select a **Category**. (For example - **Ticket assignments** that we created above.)
12. Add your standardized reply text to the **Reply Contents** box.

Note:

Your agents can edit this text before they send the reply to the customer.

13. Switch to the **Properties** tab. Here you can change ticket properties (few or many).
14. From **Set department** choose which department to assign the ticket to. (For example - 'Billing')
15. Choose a staff member to assign the ticket to from **Set ticket owner**.
16. From the next three, you change the ticket's type, status, and priority, respectively.
17. And finally, in the **Add tags to the ticket field**, you can add one or more tags to add to the ticket. (In our example, since we are transferring a ticket between departments, add **transferred** as a tag here).

Note:

You can add as many tags as you like – hit return to enter a tag and start typing a new one.

18. When you have all your changes to ticket properties locked in, click the **Save** to create your new macro.
- Now, when your team is replying to tickets, they have the option to select this macro from the list.

For further details on how to use macros when replying to tickets, see [Using macros in ticket replies](#).

Using macros in ticket replies

Once one or more macros are defined in GFI HelpDesk, they are available to use when replying or forwarding a conversation.

To apply a macro to the ticket, follow the steps given below:

1. From the **Reply** or **Forward** tab on a ticket, click the **Macro dropdown** on the **Quick Insert** bar.
2. Search or scroll to the macro you want and click to select it.
3. Review the changes to the ticket, and make any updates to the reply text you want.
4. Click **Send** to update the ticket.

2.2.3 Advance support tickets

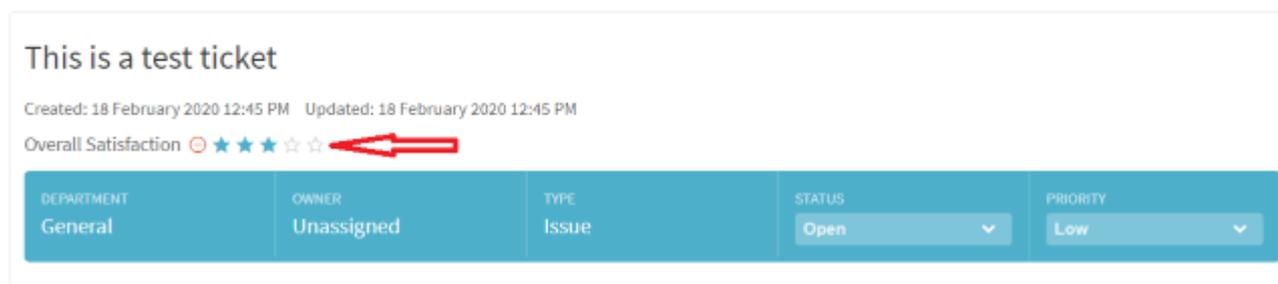
This sections has information about the advanced support tickets settings.

Overall satisfaction rating

Customers can rate their overall satisfaction (represented by the stars) on their tickets while the ticket is still open. This topic provides information about the overall satisfaction rating in GFI HelpDesk and the process to configure it.

When a customer manages their tickets in your Help Center, they have an option to provide an overall satisfaction rating within the ticket itself, as shown in the screenshot below).

View Ticket: #1358

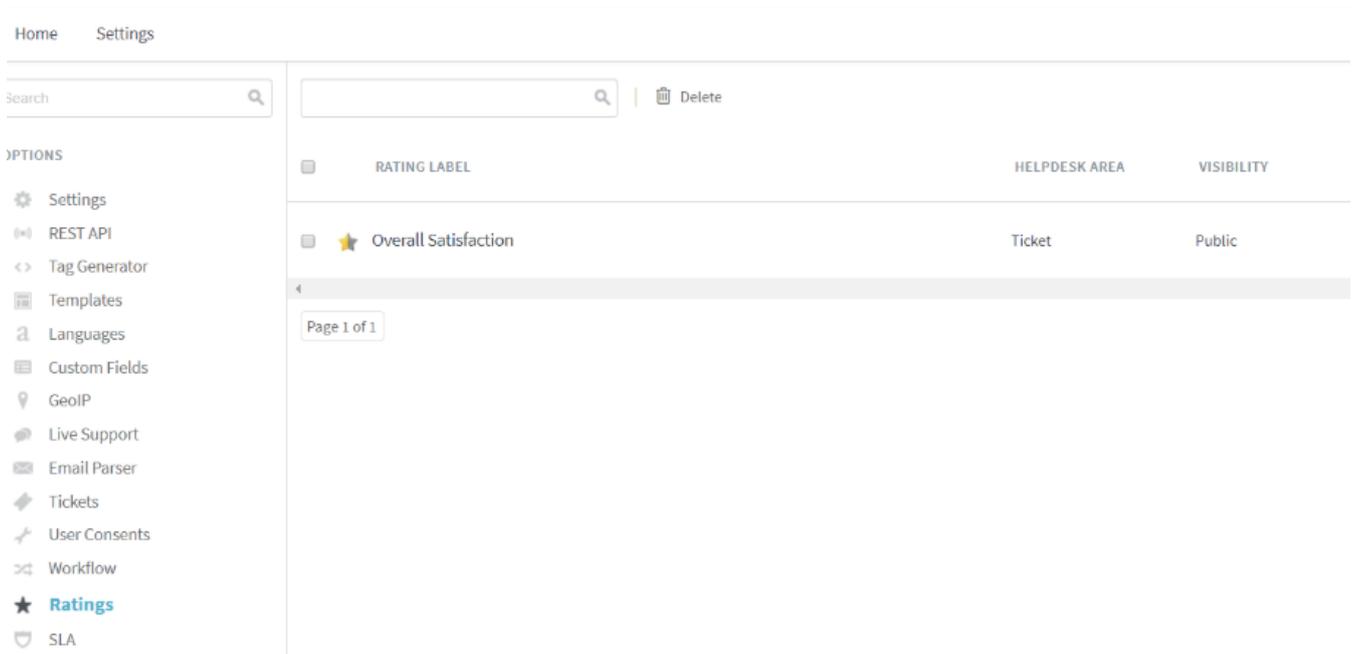


Screenshot 21: Overall satisfaction rating

The customer can rate the overall satisfaction by marking the stars while the ticket is still open. This rating is different from the survey that is being sent out when the ticket is marked as closed. It is critical to note that the responses to this rating are not logged in the audit logs and are only visible on the sidebar information of the ticket.

You cannot disable the Overall Satisfaction rating. However, you may configure it in the admin panel by following the process described below:

1. Log in to your admin control panel.
2. In the **Options** section, select **Edit the rating settings as per your requirements**, click **Save**, and then click **Overall Satisfaction**.



Screenshot 22: Navigate to the Overall satisfaction screen.

3. Edit the rating settings as per your requirements, and then click **Save**.

EDIT RATING: OVERALL SATISFACTION
✕

General
Permissions (Staff)
Permissions (User)

Rating label Overall Satisfaction

For example, *Overall satisfaction* or *Speed of resolution*.

Display order 1

Multiple ratings can appear in the same location. They will be displayed according to their display order number, smallest to largest.

Who can submit a rating? Public Private

Public Ratings are available to all users. Select this option if you want to collect feedback from your end users and have the ratings visible to staff too.

Private Ratings are available only to your staff users, for internal rating purposes.

Allow modification after first submission Yes No

The value set for this rating can be modified, if enabled.

Prevent staff from setting values for this rating Yes No

Only end users will be able to set values for this rating if enabled.

Save
Cancel

Screenshot 23: Overall satisfaction edit screen

Setting up recurring tickets

Scheduling regular tasks for your staff is an integral part of building up your organization's day-to-day operations. With GFI HelpDesk, you can automate and streamline this process by setting up recurring tickets.

For each recurrence, you can configure the ticket's content and properties, how often it recurs, and a beginning and end date.

Once created, GFI HelpDesk automatically creates and assign a new support ticket using the content you provide, at the time you've chosen.

This topic explains how recurring tickets work, and then walk you through the steps to create your first recurring ticket.

Understanding how recurrence works in GFI HelpDesk

You can use recurring tickets to automatically create a series of identical tickets at whatever time interval you choose. For example, let us say your team is required to submit performance reports to a particular customer every couple of weeks.

You can create and assign a recurring ticket to a staff member, prompting them to run and send that report every other Monday.

Creating a recurring ticket starts just like creating any ticket, with the additional step of scheduling the ticket creation to happen at regular intervals. You'll have the option to choose from the following:

- » **Daily** – repeat the ticket every specified number of days or every weekday.
- » **Weekly** – repeat the ticket every week (or another week, or three weeks, etc.) on the days of the week you choose.
- » **Monthly** – repeat the ticket on a particular day of the month (for example '22nd' or 'first Tuesday').
- » **Yearly** – repeat the ticket annually on a particular day of the year.

The rest of the ticket-creation process is identical to creating a normal, one-off support ticket. You define the ticket's properties and content just as you would otherwise. But the options you choose on the Recurrence tab tells GFI HelpDesk when and how often to create an identical ticket.

Now that we've covered what recurring tickets can do, let us go through the process of actually creating one.

Setting up recurring tickets

Each recurrence starts by creating a new ticket, and setting the configuration options on the Recurrence tab.

Note:

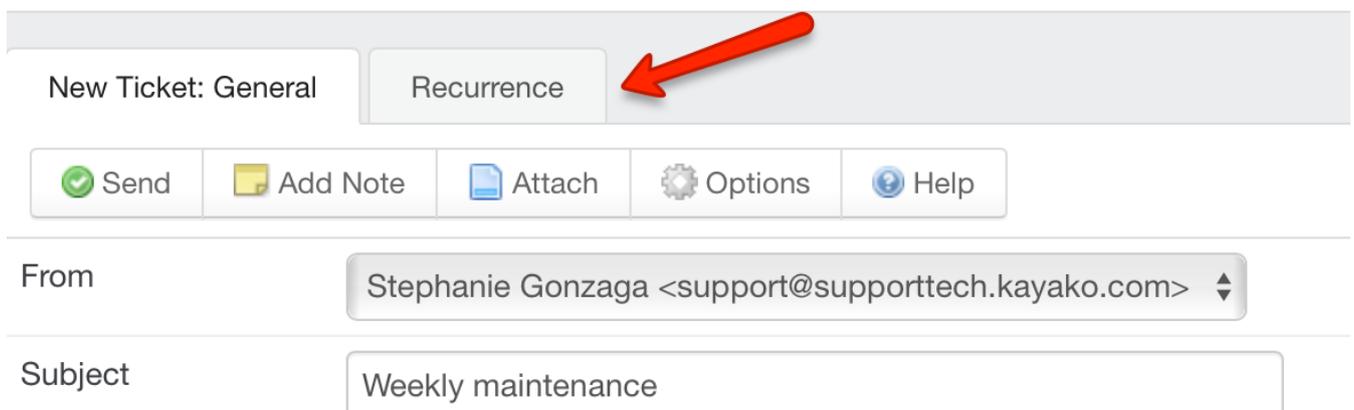
To create recurring tickets in GFI HelpDesk, you need a staff account with the 'Recurrence' permission.

1. Sign into the staff control panel.
2. Click **Tickets** in the main menu and select **New Ticket**.
3. Select the **Send an email** option.

NOTE:

This option sets you as the creator, so no autoresponder is sent to a user.

4. Select the **Department** for the ticket it belongs to.
5. Click the **Next** button to start editing the ticket contents.
6. Add an 'email address' to the **To** field for any staff member who should get an email when this ticket is created.
7. Fill in the 'ticket properties' and 'content' as you would with any other ticket.
8. Switch to the **Recurrence** tab to set the scheduling options for the ticket.



Screenshot 24: Switch to Recurrence tab

9. Choose how often you would like the ticket to recur.

NOTE:

When you make a selection, it opens an additional configuration options.

10. Set a 'beginning' and 'end' day for the recurrence.

11. Click the **Send** button to create your first ticket, and schedule future recurrences.

NOTE:

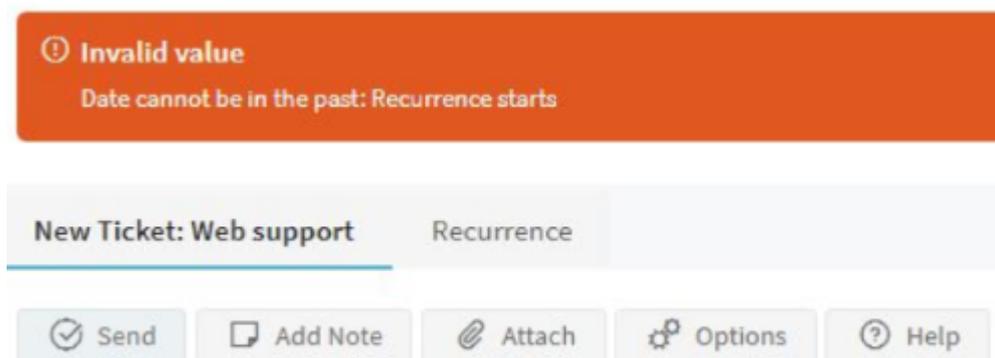
When you hit **Send**, a new ticket is created, whether it follows the recurrence pattern or not.

Error: 'Invalid Value Date cannot be in the past: Recurrence starts' while creating tickets

At times, while creating tickets, you may encounter the following error:

Invalid value**Date cannot be in the past: Recurrence starts**

This topic explains what causes the error mentioned above and how to resolve it.



Screenshot 25: Date cannot be in the past error

Two conditions would exist for this error to occur:

» The user is in a timezone that is behind the server's timezone.

For example, the server is on UTC, while the user is on UTC-05:00

» The server is into the next day while the user is still in the current day.

For example, it is 1:00 AM on Tuesday where the server is located. On the other hand, it is 8:00 PM on Monday, where the user is located.

To further illustrate the conditions under which the error occurs, suppose a user selects 10:00 PM on September 25 as the start of the recurrence, while the server is already on September 26 at 3:00 AM. In this case, the error **Date cannot be in the past: Recurrence starts** is likely to appear.

Note:

This issue is a known bug in the versions older than GFI HelpDesk 4.93.02.

If you are experiencing this issue and you are using a version that is older than GFI HelpDesk 4.93.02, upgrade to the latest version of GFI HelpDesk.

Download GFI HelpDesk from the following location depending on the required edition:

Case http://cdnd1.gfi.com/gfihelpdesk/gfihelpdesk_case.tar.gz

Fusion http://cdnd1.gfi.com/gfihelpdesk/gfihelpdesk_fusion.tar.gz

IMPORTANT!

At times, the issue might persist due to caching issues even after an upgrade was completed.

If the issue persists, try the following troubleshooting steps:

1. Rebuild the GFI HelpDesk Cache.
 - a. Navigate to your Admin control panel.
 - b. Go to **Diagnostics > Rebuild Cache**.
 - c. Once done, log out from GFI HelpDesk and log back in.
2. Clear your browser's cache.

Click on the links below for instructions on how to clear your browser's cache and cookies:

- » [Google Chrome](#)
- » [Internet Explorer](#)
- » [Firefox](#)
- » [Safari](#)

If you are using a browser other than the ones listed above, you can search on Google for the correct steps or consult the browser manufacturer for assistance.

Customizing messenger icons

This topic provides instructions on disabling default department selection when submitting tickets in Helpdesk portal.

To do this, follow the below steps:

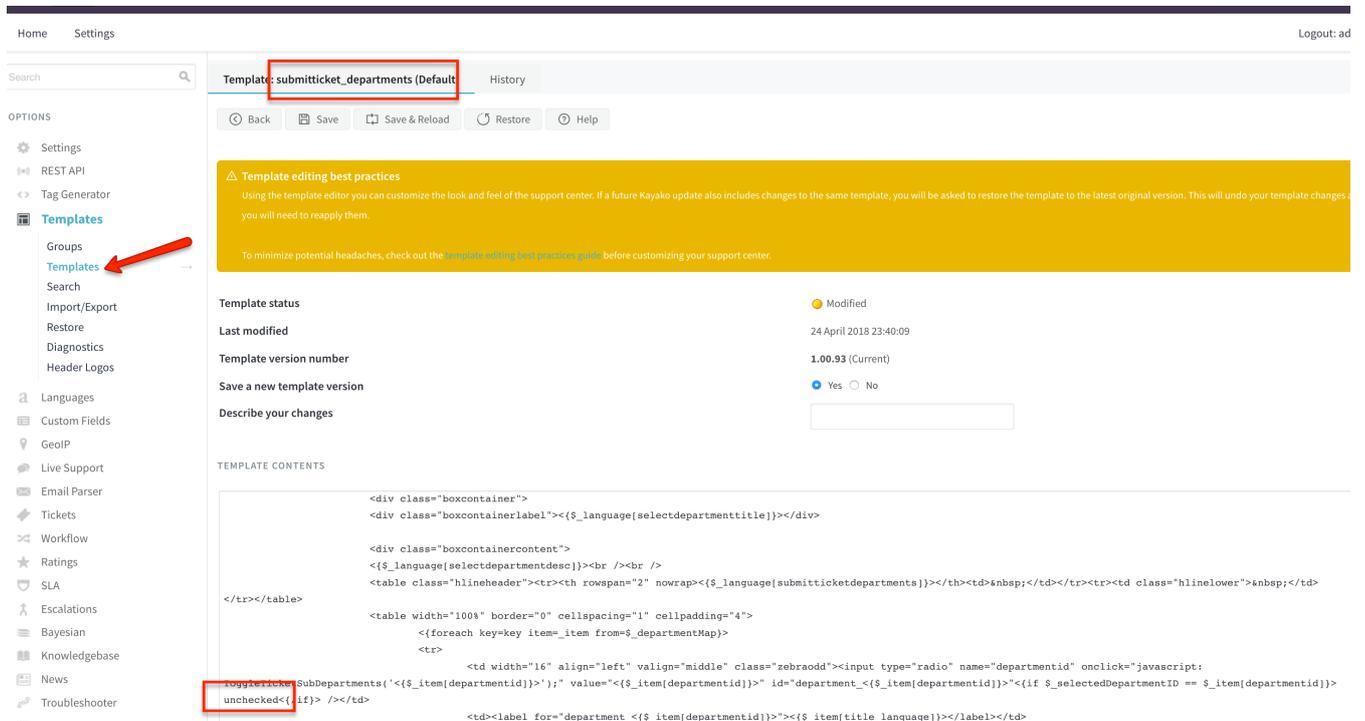
1. Go to the path: **Admin CP > Templates > Templates > Tickets > submitticket_departments**.
2. Find the following snippet in the template contents:

```
<td width="16" align="left" valign="middle" class="zebraodd"><input type="radio" name="departmentid" onclick=k="javascript:ToggleTicketSubDepartments('<{$_item[departmentid]}>');" value="<{$_item[departmentid]}>" id="d-department_<{$_item[departmentid]}>"><if $_selectedDepartmentID == $_item[departmentid]> checked</if>/></td>
```

3. Replace the above template snippet with the following content:

```
<td width="16" align="left" valign="middle" class="zebraodd"><input type="radio" name="departmentid" onclick="javascript:ToggleTicketSubDepartments('<${_item[departmentid]}>');" value="<${_item[departmentid]}>" id="department_<${_item[departmentid]}>"><{if $_selectedDepartmentID == $_item[departmentid]}> unchecked</if>> /></td>
```

The only update made to the template is the radio input type changed from checked to unchecked.



Screenshot 26: Template: submittickets_departments (Default)

Note:

You may need to choose the proper template group before changing your template.

4. After performing the change, click **Save**.

Users setting priority for their own tickets

This article guides you on how users can set the priority of their own tickets.

To do this, follow the below steps:

1. Log into the Admin Control Panel and open the Template Group you want to edit.
2. From the **Settings: Ticket** tab, you can set the **User can select a ticket priority** field to **Yes** or **No**.

NOTE:

This option is enabled by default.

Edit Template Group: Default

General | Permissions | Settings | **Settings: Tickets** | Settings: Live Chat

Templates | Delete | Restore | Help

Default department
This department will be selected by default on the *submit ticket* page in the support center of this template group. letter requests

Default ticket type
Tickets created from this template group will use this type by default. Task

Default ticket status
Tickets created from or replied to from this template group will be set to this status. If a user replies to a ticket that is associated with this template group, the ticket will be changed to this status. Open

Default ticket priority
Tickets created from this template group will be set to this priority by default. Normal

User can select a ticket type
When creating a ticket, a user can select a ticket type. If not, the default type will be used. Yes No

User can select a ticket priority
When creating a ticket, a user can select a ticket priority. If not, the default priority will be used. Yes No

Save Cancel

Screenshot 27: Set the **User can select a ticket priority** field

With this option enabled, users are now prompted to select a priority level when submitting their support requests. If disabled, there is no option to choose, and GFI HelpDesk assigns the default priority.

For more information, see [Restricting Users from Setting the Ticket Priority](#).

Creating tickets on behalf of an existing user

This topic provides the steps to create the tickets on behalf of an existing user.

Follow the steps below to create the tickets on behalf of an existing user.

1. Navigate to the **Staff Control Panel > Select Tickets > New Ticket**.
2. Select **As a user** as the ticket type.
3. Choose the department from the drop-down menu.
4. Click **Next**.
5. You can then log a ticket on behalf of a user by adding his name.

Setting automatic ticket follow-ups

Staying on top of every ticket in your queue is a difficult task. With follow-ups, you can offload some of that pressure by scheduling ticket replies or updates at any time you specify.

The following are some examples when follow-ups are essential for providing efficient customer support to your customers:

- » A ticket needs a response from your engineering team. You can reply to the ticket saying you will check and get back to them, and then create a follow-up to automatically re-open the ticket in a few days' time.
- » You have resolved a ticket, but you want to make sure your user is getting on alright. You could set a follow-up to automatically email your customer a week after the ticket is closed, to make sure everything is going smoothly.

This topic guides you through the different options available for follow-ups, and the process of creating your own.

Things You Need to Know

Follow-ups are set on individual tickets. This means that you cannot create or set a single follow-up to be applied to multiple or all tickets in your helpdesk.

The follow-up cannot be set with a dependency condition based on the customer's response to the ticket. For example, you can not set a follow-up to fire when the customer does not respond to the ticket after a certain number of days. This is because the follow-up will fire regardless of any conditions. However, this can be achieved using the Auto-Close rule.

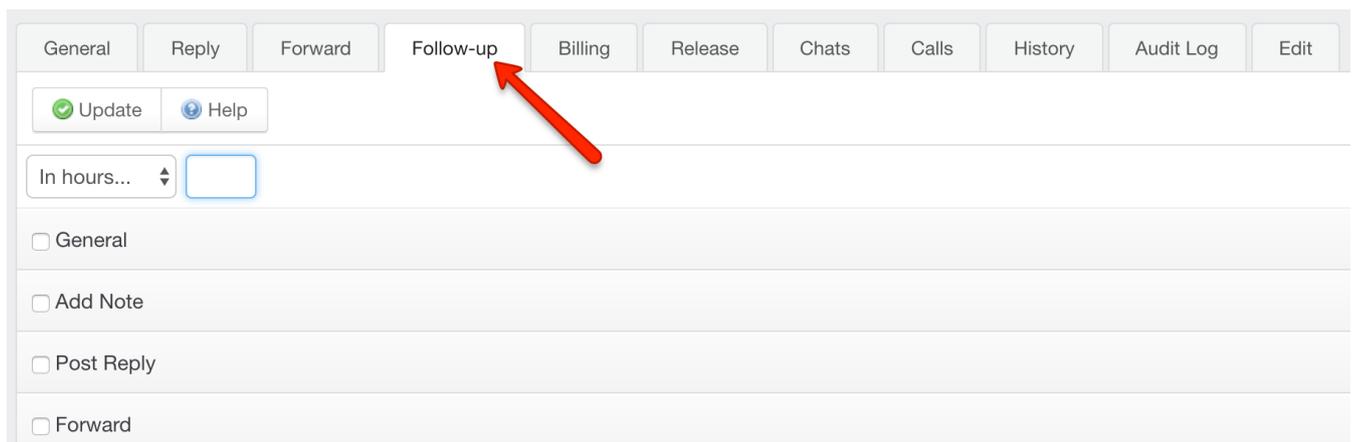
Using Auto-close rules, you can have GFI HelpDesk automatically email your customers if their ticket has been inactive for a certain time, and then automatically resolve the ticket if you still get no response. To learn more about this feature, refer to Resolving Tickets Automatically Using Auto-Close Rules.

You can use the Follow-up function to change the status of the ticket automatically.

Process to Setup automatic ticket follow-ups

To set up automatic ticket follow-up, do the following:

1. You can set a follow-up from any support ticket's Follow-up tab, as shown in the figure below:



Screenshot 28: Follow-up tab

2. Select a time for the follow-up, either by setting it to pop up in a certain number of minutes, hours, days, etc. or simply by selecting a specific date and time.

Screenshot 29: Set date and time for follow-up

Select the actions that you want GFI HelpDesk to perform once the follow-up time, specified in step 2, has reached:

- » The General section allows you to make changes to the ticket DEPARTMENT, OWNER, TYPE, STATUS, or PRIORITY.

Screenshot 30: The general section

- » The Add Note section allows you to add a customized note to the Ticket, User, or User Organization.

ADD NOTE

NOTES

Note type Ticket User User Organization

Screenshot 31: Add note

- » The **Post Reply** section allows you to save a ticket reply that is sent to the user when the follow-up's target time is reached.

POST REPLY

Screenshot 32: Post reply

» The **Forward** section gives you the option to forward the ticket to any email you specify, optionally accompanied by a message.

FORWARD

To

(Email will be sent to first recipient only).

Screenshot 33: Forward section

Example of Creating a Ticket Follow-Up

This example describes the process of creating a follow-up that must fire after 2 days and reopen the ticket, set it to high priority, and add a note reminding you where you left things.

Note:

To set ticket follow-ups in GFI HelpDesk, you need a staff account with the Ticket follow-ups permission.

To set a follow-up on a ticket, follow the steps given below:

1. Sign in to the staff control panel.
2. Open the ticket you want to follow up on.
3. Click the **Follow-up** tab.

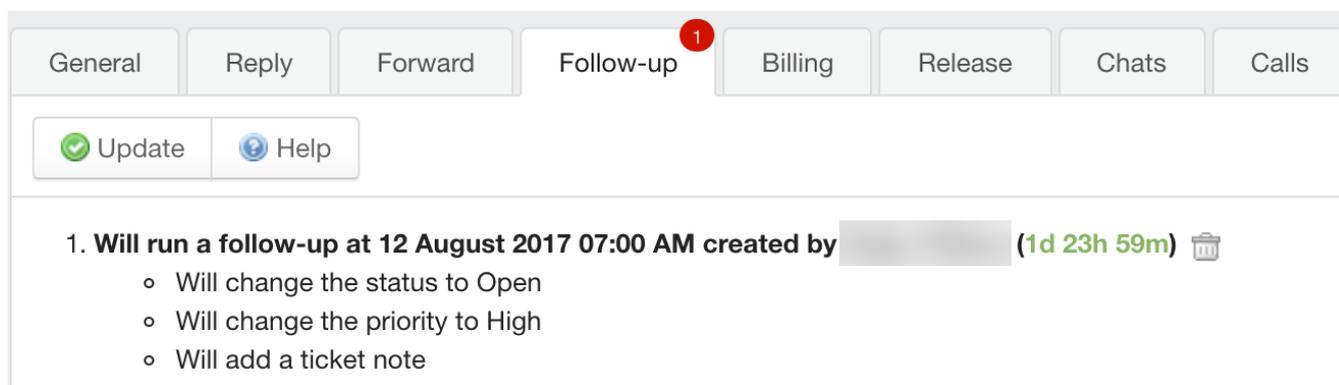
4. Now, set the timeframe. Select In days and enter 2.
5. Check the **General** box.
6. Set the **Status** to **Open** and **Priority** to **High**.

Note:

The user can set these options however they like, we are just going through the given scenario of how the user might use follow-ups.

7. Check the **Add Note** box.
8. Add an explanatory note to remind yourself of what attention the ticket needs from you. For example, the user is waiting on a response from the engineering team.
9. Click the Update button on the top toolbar to save it.

Confirmation: You are able to see all the follow-ups that you have set on a ticket, as well as their behavior, in the **Follow-up** tab, as shown in the image below.



Screenshot 34: You can view all the follow-ups set on a ticket

Note:

Set up an external cron on the server for follow-ups. For more information, refer to Setting up a server cron or scheduled task.

Resolving tickets automatically using auto-close rules

Using auto-close rules, you can have GFI HelpDesk automatically email your customers if their ticket has been inactive for a certain length of time, and then automatically resolve the ticket if you still get no response.

This means your team won't have to lift a finger to prompt customers who have fallen silent, or clear their tickets out of the queue, when that silence stretches too long.

In this topic, we'll walk you through how to auto-close rules work, and then walk you through how to set up auto-close for your own desk.

Understanding how auto-close rules work

You'll manage your auto-close rules from the 'Tickets' menu in the admin panel. When you create a new rule, you'll have the chance to define a few different criteria:

- » **Resolved status** – You can choose any 'resolved' ticket status – standard or custom – to move the tickets to, when the rule closes them.

- » **Inactivity threshold** – This is the first of two-time limits you'll set. If no update is made to a ticket in the number of hours you define here, GFI HelpDesk automatically marks the ticket as inactive.
- » **Closure threshold** – Once a ticket has been marked inactive, GFI HelpDesk then starts counting toward the closure threshold. When the ticket has stayed inactive for the number of hours you define here, the rule sets the ticket to the resolved status you've chosen.
- » **Notifications** – You'll have the option to send customers an automatic email when either the inactivity or closure threshold has been met. You can also customize those messages by modifying the phrases for the auto-close notifications.
- » **Ticket criteria** – You can also limit the scope of the auto-close rule according to tickets' attributes as well, like department, type, status, etc.

Overall, by defining a set of auto-close rules, you can tell GFI HelpDesk to send reminders about and set timers for any subset of your tickets, so your team doesn't have to chase down disengaged customers manually.

Creating a new auto-close rule

You may want to have a plan for which tickets you want to target with your rule, as well as the thresholds you want to set for inactivity and closure. Once you've got those in hand, you're ready to dive into the instructions.

NOTE:

To manage auto-close rules in GFI HelpDesk, you need an administrator account with the 'Ticket auto-close rules' permission.

To add a new auto-close rule:

1. Sign into your admin control panel.
2. Under the **Tickets** section, click the **Auto-close** link.
3. Here you can see any rules your team has already configured and the default 'Close tickets after five days if we won't hear back from the customer' rule. Click the **New** button in the upper-right.
4. In the **Rule title** text box, enter a title for this auto-close rule.
5. From the **Change status to** drop-down, select either a default or custom 'resolved' status that you want the rule to move tickets into when it's closed.

NOTE:

To check whether the status is resolved or unresolved, go to **Tickets > Statuses** in the admin control panel and click a status to review its details.

6. In the **Inactivity threshold** box, specify the number hours after which GFI HelpDesk should mark the ticket as inactive.

7. In the **Closure threshold** box, specify the number of hours after which the ticket should go to the resolved status.

NOTE:

These thresholds are calculated using calendar hours, not business hours.

8. If you want to send an email to the customer when their ticket hits the inactivity threshold, set the **Send inactivity notification email** option to Yes.
9. If you want to send an email to tell the customer when their ticket is closed, set the Send final ticket closed notification email option to Yes.
10. You can also tell GFI HelpDesk not to send a survey invitation for automatically closed tickets, by setting the **Suppress customer survey email** option to **Yes**.
11. Set the **Rule is enabled** to **Yes** to enable the rule when you save it.

NOTE:

You can always come back and change this later.

12. The **Execution order** field gives you the chance to tell GFI HelpDesk which order to execute your auto-close rules, in case you have more than one enabled. The smaller the number you select here, the higher priority it takes.
13. Finally, in the last step, you can specify any criteria by which you want to limit the scope of your new rule. GFI HelpDesk automatically closes only tickets that match the criteria specified here.

NOTE:

If you use Ticket status as a criterion, you need to select 'unresolved' statuses.

14. When you're done defining your criteria, click the **Insert** button in the top toolbar to save your new rule.

Note:

If you are using the self-hosted version of GFI HelpDesk, set up an external cron on the server for auto-close. For more information, see setting up a server cron or scheduled task.

Standardizing support procedures with workflows

Many support teams spend a lot of time handling common administrative support requests like equipment purchases or travel budget approvals. These requests go through a predefined set of steps that do not change from one request to the next.

Using GFI HelpDesk workflow feature, you can capture and streamline these procedures, saving your team valuable time and dramatically reducing the occurrence of human error.

Workflows are built to capture each step in a procedure so it can be followed exactly the same way every time, at the push of a button. Whether your process has two steps or a dozen, you can use workflows to keep your team and your tickets on track.

In this topic, you can see how you might use GFI HelpDesk workflows, and then walk you through how to create that example, step-by-step.

Understanding how to use workflows

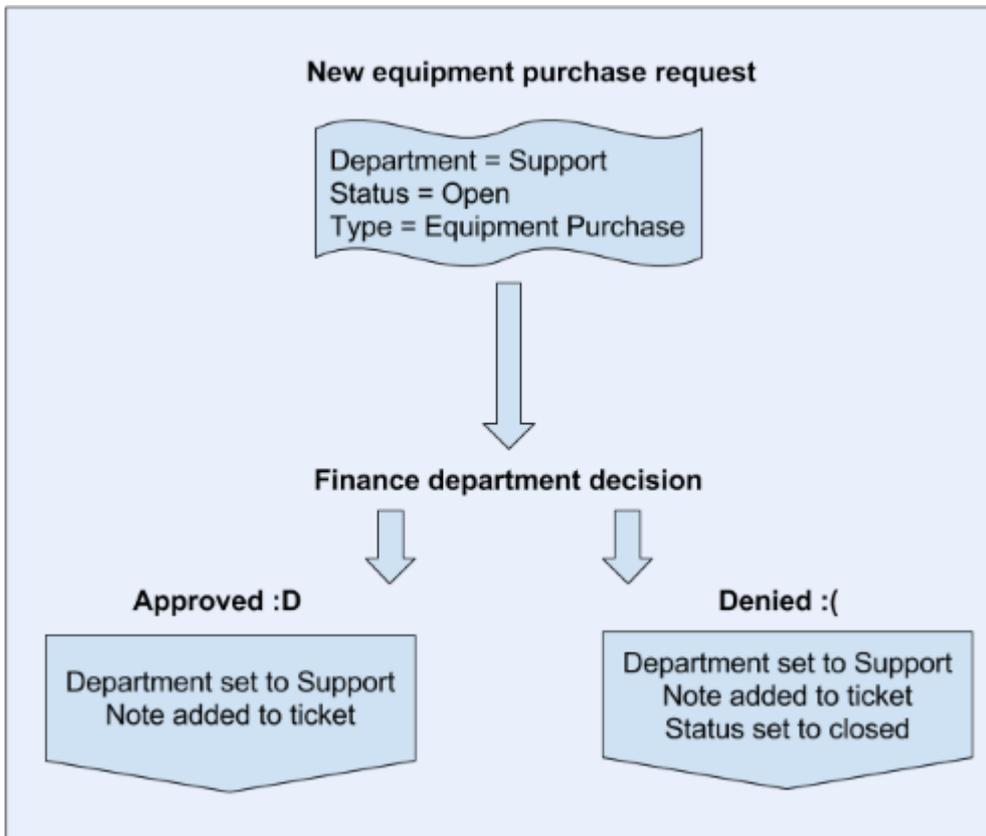
Let's have a look at a specific example of how a team might use workflows so that we can understand how all the pieces come together. We go with purchasing a piece of new equipment since it is a common use case for workflows.

When a new request comes in where someone wants to purchase a new piece of equipment, what steps does it need to go through?

The request goes through two steps:

1. The **Support** department needs to pass it to the finance team.
2. The **Finance** department either approves or denies the funds for the request.

The flow of the issue would look something like this:



Screenshot 35: Flow of the issue

Looking at the diagram, we have a few things going on:

- » There are two main parties involved – a support team member and a finance team member.
- » We have a set of ticket criteria established – open 'equipment purchase' tickets assigned to the support department.
- » And we have three total steps defined:
- » When the issue comes in, the support staff member uses the workflow to assign the ticket to finance.
- » When it lands with finance, they can do one of the following:

approve the request, which returns the issue to support and add a note about their approval,

deny the request, sending it back to support, adding a note, and closing the issue.

In GFI HelpDesk, we can define a workflow for each one of these steps, and limit their visibility based on ticket criteria. Then, every time a purchase request comes in, the support team can move it along to finance with the press of a button, and finance can either approve or deny it.

Now, this example probably is not an exact match for a process in your organization, but you can see how you might start mapping common procedures so they can be standardized with workflows. A great way to get started is to sit down with an actual pen and paper and map out the steps of your real-world processes using flow diagrams. This makes it much easier to determine how many workflows you need and what each of them needs to do.

Read on for step-by-step instructions on how to create a set of workflows that would function as described above.

Creating a multi-step workflow

To create multi-step workflow, do the following:

- » Build your workflows from the Admin Control Panel.
- » Your team can execute from the staff control panel.
- » When creating a workflow, you can define criteria that tickets must match, before the workflow is available.
- » Then you can choose updates to apply to the ticket when the workflow is executed.

So that you can get a feel for creating a batch of related workflows, we go through the steps for creating each of the three equipment purchase workflows we discussed above.

NOTE:

To create workflows in GFI HelpDesk, you need an admin account with the 'Workflows' permission.

So let's start in on our first workflow!

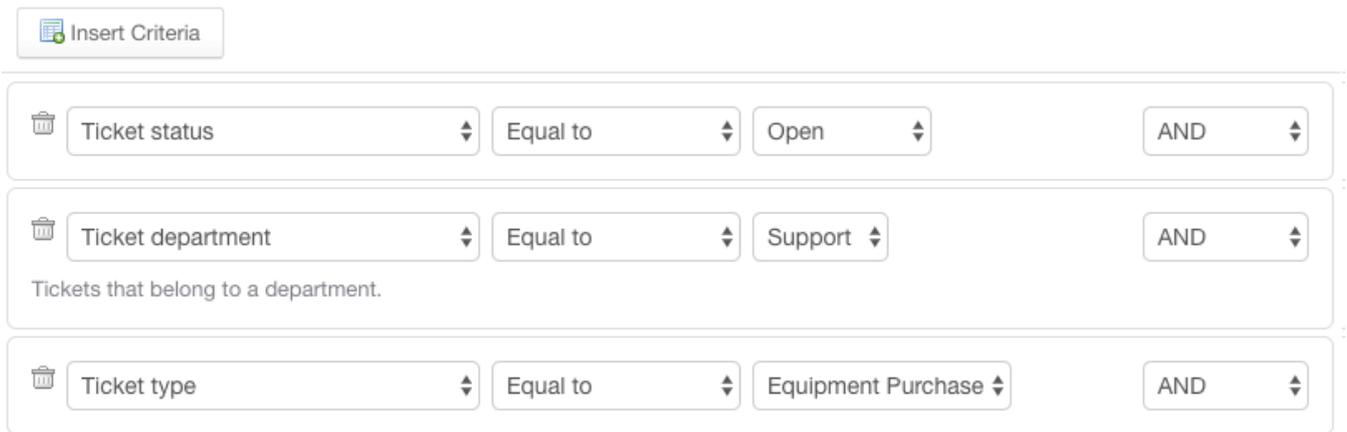
Workflow 1: Move ticket to finance for approval

1. Sign in to the admin control panel.
2. Click on **Workflow** on the sidebar.
3. Click the **New** button in the upper-right.
4. Add a brief, descriptive title to the Workflow rule label box, like Purchase Request.

Note:

Make sure you use a name that is clear and accurate, as this text is used when your team is executing the workflow on a ticket.

5. Leave Workflow is enabled set to **Yes**.
6. In Display order, you can tell GFI HelpDesk how to sort the workflow in a list, with smaller numbers appearing higher on the list.
7. Now, to add the criteria we want our tickets to match. We want to select for Open tickets in the Support department, of the Equipment Purchase type. Click the Insert criteria button to add each of the three.
8. When you are done, your rule criteria should look like this:



Insert Criteria

Ticket status Equal to Open AND

Ticket department Equal to Support AND

Tickets that belong to a department.

Ticket type Equal to Equipment Purchase AND

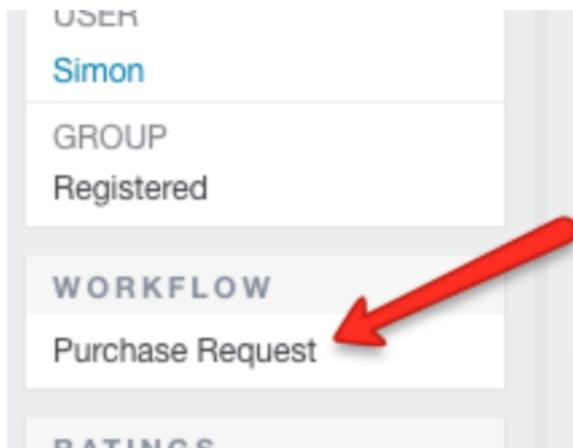
Screenshot 36: Insert criteria

9. Next, add an action for the workflow to perform. In this case, we just want it to move the ticket to the Finance department. Click the Actions tab.

10. From the **Move ticket to department dropdown**, select **Finance**.

11. Now click the **Insert** button up top, to save your workflow.

And that's step one! Whenever a member of the support department is looking at a ticket that matches our criteria, this workflow appears in the left-hand sidebar.



Screenshot 37: Workflows appears in the left hand bar

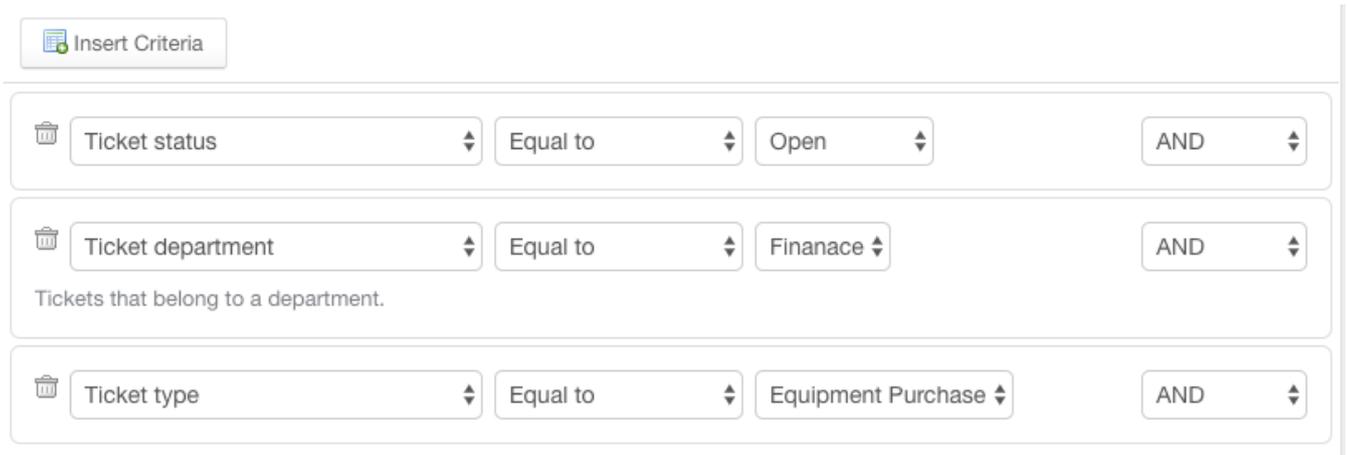
When they click it, the ticket is moved to the finance department. Now let's set up some workflows to help the finance team respond.

Workflow 2: Finance approves purchase request

Once an equipment purchase request lands in the finance team, we want to make responding as easy as possible for them, so we'll set up a workflow to approve the request and another to deny it.

1. Head to the admin control panel and click **Workflows** in the sidebar again.
2. Click the **New** button.
3. In Workflow rule label box, add a title. Let's go with Purchase - Approval.
4. Enable the workflow, and set a display order.
5. Click the **Insert** criteria button three times, to create our criteria.
6. For this one, we want to specify Open tickets in the **Finance** department, of the Equipment Purchase type.

7. The criteria for your new rule should look like this:



Insert Criteria

Ticket status Equal to Open AND

Ticket department Equal to Finance AND
Tickets that belong to a department.

Ticket type Equal to Equipment Purchase AND

Screenshot 38: Criteria for new rule

8. Switch to the **Actions** tab. We are going to have this rule move the ticket back to the support department and add a note letting them know the request is approved.

9. From the **Move ticket to department** dropdown select **Support**.

10. In the **Add a note to ticket** text box, type the copy for your note, like "Approved for purchase, enjoy!".

11. Click **Insert** button to save the workflow.

Almost there, we just need to add one more for when finance turns down a request.

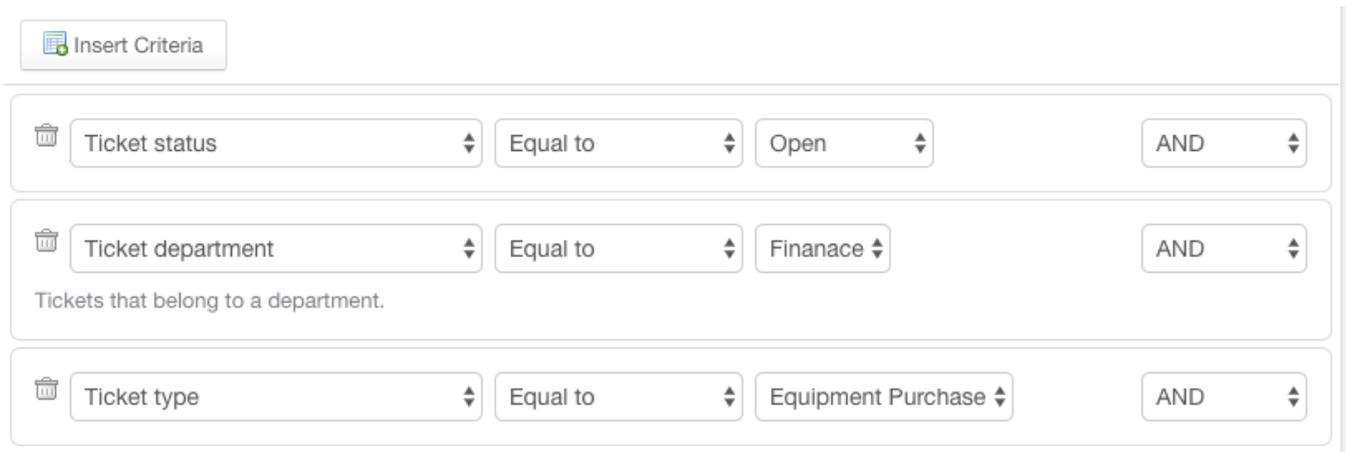
Workflow 3: Finance denies purchase request

The steps for this last workflow is nearly identical to the approval rule above, with just a few small but important adjustments.

1. From Workflows in the admin control panel, click the New button one more time.

2. For the Workflow rule label, let us use Purchase - Denial.

3. Set the same criteria we used above:



Insert Criteria

Ticket status Equal to Open AND

Ticket department Equal to Finance AND
Tickets that belong to a department.

Ticket type Equal to Equipment Purchase AND

Screenshot 39: Set the same criteria as in workflow 2

4. Switch to the **Actions** tab.

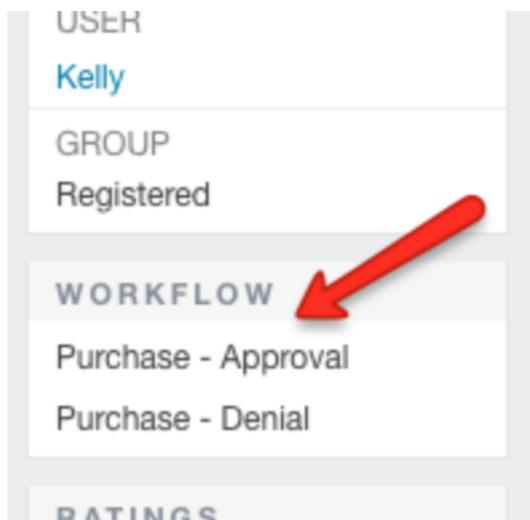
5. From the **Move ticket to department** dropdown select **Support**.

6. In the **Add a note to ticket** text box, add a denial message, like "Sorry, we are not able to approve this request."

7. And finally, for denied requests, we use the **Change ticket status** field to set the ticket to **Closed**.

8. Click **Insert** button to save the workflow.

With these two workflows enabled, any member of the finance department who is viewing an equipment request ticket sees the following in the sidebar:



Screenshot 40: Second workflow also appears in the left pane

So the next time a team lead writes in requests a chocolate fountain to improve team morale, it only takes your support and finance teams a couple of clicks to take their ticket from the queue to here:

As you can imagine, there are many more situations where workflows can come in handy to streamline and standardize your team's practices. Experiment with the criteria available and the possible actions workflows can perform. S

Some of our favorites are emailing notifications to your customers or staff members and tagging tickets to give them extra context.

No matter what your team's procedures look like, GFI HelpDesk workflows are definitely worth exploring.

Attaching large image files directly to the body of the ticket

When you try to add large image files directly into the body of the ticket, you may sometimes experience performance issues on your helpdesk. The helpdesk may stop responding, and the more images you add, the worse it becomes.

At some point, images finally attach, but the application consumes excessive CPU resources in the process.

This topic explains why this issue is occurring and how to fix it.

When you drag and drop or copy and paste images into the text area, the text editor in GFI HelpDesk (TinyMCE) encodes it as a Base64 or Blob image and uses it as the src attribute for the image tag.

As a result of the image being encoded in this way, the size of your HTML post increases significantly because encoded images are typically far larger than other file formats such as png, jpg, or gif. Therefore, if your content has ten images within it, adding ten encoded images increases greatly the size of the post and the time required to process it.

JavaScript support in macros for GFI HelpDesk

JavaScript is not supported for creating or editing your macros but you can use the HTML format.

Editing "Select Department" form description text and GFI HelpDesk templates

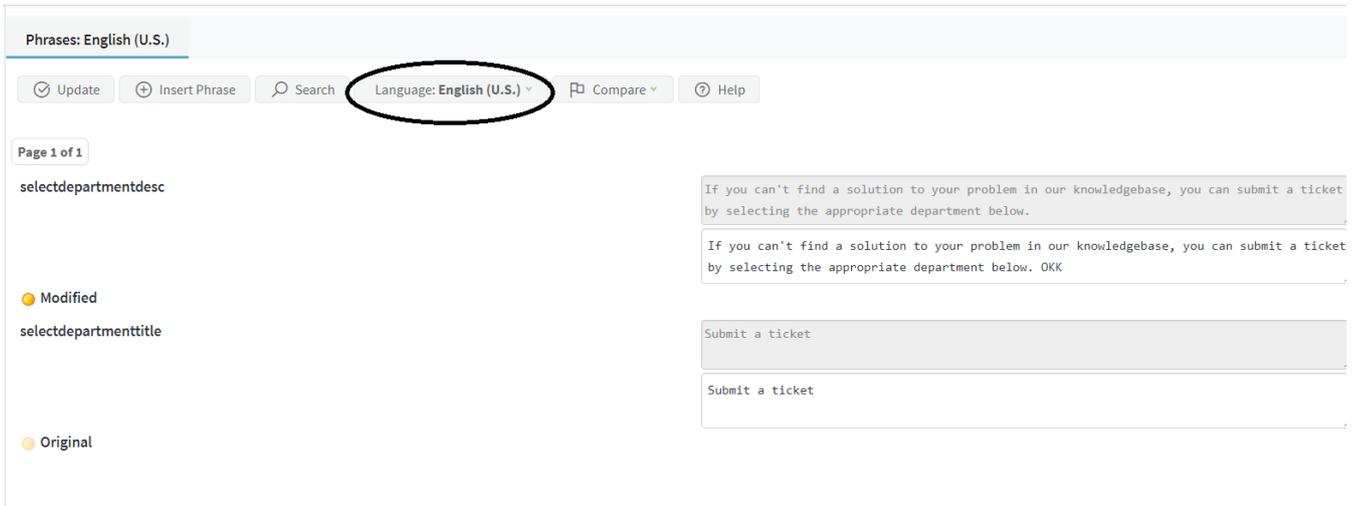
This topic provides the steps to edit the default description of the "Select department" form when submitting a ticket.

The default wording of the description is:

If you can't find a solution to your problem in our knowledgebase, you can submit a ticket by selecting the appropriate department below.

To edit **Select Department** form description text, do the following:

1. Navigate to **Admin Control Panel > Languages > Search**.
2. Enter `selectdepartment` in the **Search Query** textbox.
3. Edit the wording of the contents of the `selectdepartmentdesc` and (or) `selectdepartmenttitle` textboxes. Text can be edited for the language selected from the corresponding drop-down:

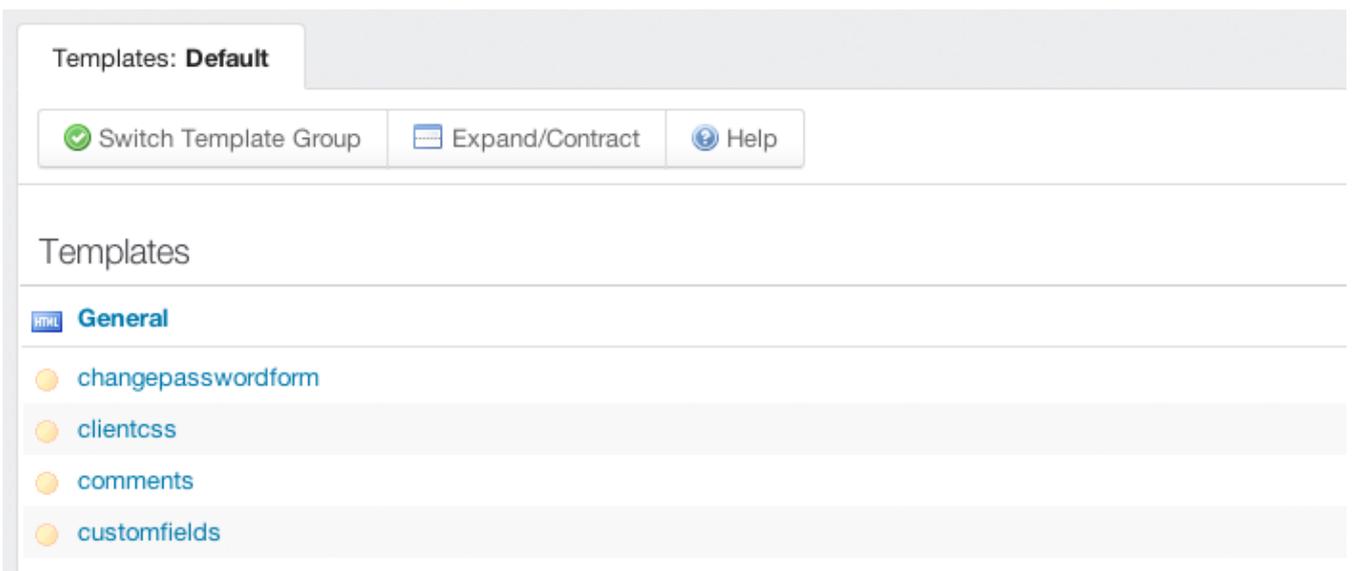


Screenshot 41: Select the language for the text

4. Click the **Update** button to save changes to the template.

Editing GFI HelpDesk Templates

The support center is put together using a number of templates. For example, there is a template for the header, footer and one for the CSS (`clientcss`).



Screenshot 42: Template for header, footer, clientcss

You can customize the complete look and feel of the support center using the template system. The template system (found in the admin control panel under Templates) lets you modify the style, content and layout of the templates.

Best practice for editing GFI HelpDesk template

This topic has some of the best practices for editing templates in GFI HelpDesk.

Best practice: Keep track of customizations for template restores

Occasionally as part of an update, GFI HelpDesk may make a change to the support center templates.

When you update your helpdesk, GFI HelpDesk does not automatically apply these changes to your templates. Instead, it marks the respective template as 'out of date' and asks you to restore the template to its original version. Until this is done, the support center does not reflect the latest update to your helpdesk.



Screenshot 43: Templates out of date

The reason why GFI HelpDesk does not do this automatically is to give you a chance to check if you have customized the template that needs to be restored. If you have customized the template, you then have the opportunity to make a note of the customizations made so that you can reapply them once the template has been restored.

GFI HelpDesk saves a history of your template changes. This history is available even if you restore the template. If you click on the History tab when viewing a template, you are able to compare between versions allowing you to easily identify and re-apply your changes.

Find out more about restoring templates at [Managing your template modifications](#) and read below to find out about template customizing best practices.

Best practice: Edit as few templates as possible

It is important to consider carefully how to achieve the customizations you want for your support center, and to consider whether modifying the HTML in templates is really necessary.

There are two reasons for which you should modify as few templates as possible:

The more templates you change, the more likely it is you are inconvenienced if GFI HelpDesk makes a change to a template as part of an update (which means that the template would be out of date and would need to be restored to its latest original version and your customizations needs to be reapplied).

The more templates you change, the more difficult it is to isolate any problems.

Best practice: Keep your CSS changes in the 'customcss' template

The customcss template was introduced in GFI HelpDesk 4.60.

All of the CSS for the support center is contained in one template called clientcss.

Because this template covers all of the support center, it is likely that GFI HelpDesk modifies it between helpdesk updates to add new functionality or fix bugs.

Therefore, we suggest that any CSS changes you wish to make should be made in the `customcss` template. We never make changes to this template; it is empty and intended solely for your own custom CSS. It is loaded after **clientcss**, meaning anything in **customcss** overrides **clientcss**.

For example, by default, **clientcss** includes a statement to style the title of knowledgebase articles:

```
.kbtitle
{ font-size: 30px;
  font-weight: 200;
}
```

If you wish to increase the font size, rather than modifying this statement in **clientcss**, you should override the statement using the **customcss** template by adding:

```
.kbtitle {
  font-size: 40px;
}
```

Because **customcss** is loaded after `clientcss`, the element **kbtitle** ends up with a font-size of 40px and a font-weight of 200.

Try to use CSS rather than editing the HTML

For example, let us say you wanted to hide the author avatar shown on knowledgebase articles. In the template `knowledgebasearticle` you find the following HTML:

```
<divclass="kbavatar"><imgsrc="/Base/StaffProfile/DisplayAvatar/"align="absmiddle"border="0"/></div>
```

Rather than modifying the template directly by deleting this HTML, you could create a new CSS statement in the `customcss` template to hide it:

```
.kbavatar {
  display: none;
}
```

Handling SMTP SSL errors

While working with an external SMTP server, you may receive some SSL errors related to the connection with the server, such as:

PHP

05 April 2018 10:43 PM (9h 33m 2s)

Router: http://support.easysol.net/staff/Tickets/Manage/Index/16543/unassigned/-1/-1/-1/0

fwrite(): SSL: Connection reset by peer (/__

swift/thirdparty/SwiftMailer/classes/SwiftMailer/Transport/StreamBuffer.php:232)

PHP

05 April 2018 10:24 PM (9h 52m 4s)

Router: http://support.easysol.net/cron/Base/CronManager/Execute

fgets(): SSL: Connection reset by peer (/__

swift/thirdparty/SwiftMailer/classes/SwiftMailer/Transport/StreamBuffer.php:165)

PHP

05 April 2018 08:40 PM (11h 36m 14s)

Router: http://support.easysol.net/cron/Parser/ParserMinute/POP3IMAP

fwrite(): SSL: Connection reset by peer (/__

swift/thirdparty/SwiftMailer/classes/SwiftMailer/Transport/StreamBuffer.php:232)

The resolution of these issues is out of the scope of support. You need to contact your email service provider to solve this issue.

You can confirm the usage of external SMTP server from **Admin Panel > Settings > Email > Use an SMTP server to send emails** (if set to 'Yes', it means that you are using the external SMTP server).

NOTE:

If you set SMTP server to send emails to 'NO', it means that SendGrid server is used.

Disabling customer satisfaction surveys

This topic provides step-by-step instruction on how to disable customer satisfaction surveys on Tickets and Chats.

Disabling Ticket Surveys

By default, survey emails are enabled only for the 'Closed' ticket status.

» You can disable the survey emails by navigating to **Admin CP > Tickets > Statuses > Closed > Options > Send satisfaction survey email = No**.

Disabling Chat Surveys

» Empty the contents of the following phrases from **Admin CP > Languages > Phrases** :

* chatendednotificationsub

* chatendsurvey

Survey email/chat is not sent to the user asking for rating and comments.

Configuring GFI HelpDesk's default autoresponder emails

Autoresponder is the term used for acknowledgment emails dispatched when a new ticket is created in helpdesk.

Follow through this article to learn how you can configure when it should be dispatched, and also modify the content as well as layout.

Dispatch Settings

The table below shows you where to configure the dispatch settings for each of the ticket sources.

Ticket source	Setting
Tickets created from Support Center	<ul style="list-style-type: none"> » Dispatched per the user group of the active user. » This can be set from the <code>Receives new ticket autoresponder</code> setting for a user group in the Admin interface.
Tickets created via REST API	<ul style="list-style-type: none"> » The Boolean value set for the <code>ignoreautoresponder</code> POST variable is responsible in case of ticket creation from the REST API. » For Staff API, the Boolean value set for <code>sendautoresponder</code> node in XML payload for creating a new ticket is considered.
Tickets created from emails	This can be disabled globally for each email queue via the Send new ticket autoresponder setting in the Admin interface.
Tickets created from Staff interface	Users determine whether an autoresponder is dispatched by selecting the Send autoresponder checkbox while creating a ticket. Send Email acts as an email client and only allows staff to send a copy of the ticket content.
On Premise	Clients can tweak default checkbox selection via making custom tweaks to <code>class.View_Ticket.php</code> under <code>...apps\tickets\staff</code> in the document root of helpdesk.

In case you want to nullify the autoresponder for emails received from particular sources or on the basis of certain criteria, you can make use of Pre Parser action set available in **Admin interface > Options > Email Parser > Rules** to disable autoresponder.

If new emails from a source are not triggering an autoresponder, (presuming, you have already cross-checked rules and email queue setting) check loop blockages and fine-tune existing loop blocker rules in **Admin interface > Options > Email Parser > Loop Blockages / Loop Blocker rules**. These rules are designed to prevent loops created by autoresponder/out-of-office emails dispatched from the user's end.

Modifying Autoresponders

Language phrases in helpdesk contain the content, are referred to in templates and templates, in turn, are responsible for the layout of outgoing emails. Template and language selection is determined via how the ticket has been created.

The templates for autoresponder emails are `email_ticketautoresponderhtml` and `email_ticketautorespondertext` and can be accessed from **Tickets group** under **Admin interface > Options > Templates > Templates**.

Language phrases for a language pack can be searched and modified on the basis of identifier or text from **Admin interface > Options > Languages > Search**.

Template and Language Selection

The table below shows you where to configure the templates and the language settings for each of the ticket sources.

Ticket Source	Setting
Tickets created from Support Center	Template group accessed by the user and active language determines the language and template selection.

Ticket Source	Setting
Tickets created via REST (Representational State Transfer) API	Value set <code>fortemplategroup</code> POST variable (template group id) and the default language of that template group is used.
Tickets created from emails	Template group linked to email queue from which email is parsed determines the template group to be used. The default language linked with the selected template group is used in case an explicit default language isn't specified for user profile.
<p>Note:</p> <p>If a default language is selected to user profile from which ticket is created, it is prioritized over default language linked to applicable template group. This can be checked via Language setting under the Profile tab of a user profile from Staff interface > Users > Manage Users.</p>	
Tickets created from Staff interface	User Group of the user and it's linkage to a template group is considered for an existing user. If the user group is not explicitly linked to a template group or a new user is created (via Send Email), the default template group and its default language are considered.

Further reading:

- » Refer to the article [Setting up Autoresponders for Different Email Queues](#) for guidelines in setting up autoresponder emails.
- » Refer to the article [Customizing Notification Email Templates](#) for a detailed step-by-step guide in modifying and customizing your autoresponder emails.

Enabling the rich text editor for ticket replies

To help your staff communicate more clearly, GFI HelpDesk has an option for enabling a rich text editor your staff can use when creating or replying to support tickets. With the text editor enabled, you can fine-tune the formatting of your communications, making it easier to be clear with your customers.

To enable the rich text editor:

1. Log in to the **Admin Control Panel**.
2. On the sidebar, choose **Tickets > Settings**.
3. In the General Ticket Settings section, tick **Yes** of the **Enable TinyMCE Editor** item.

General Ticket Settings

Include ticket reply summary in staff replies The entire history of the ticket will be included in staff replies (and forwarded tickets) to users.	<input type="radio"/> Yes <input checked="" type="radio"/> No
Enable TinyMCE Editor Use the TinyMCE editor (rich text) for creating new tickets or ticket replies.	<input checked="" type="radio"/> Yes <input type="radio"/> No
Split ticket replies across pages	<input checked="" type="radio"/> Yes <input type="radio"/> No

Screenshot 44: General ticket settings

4. Click the **Update** button on the toolbar to save your changes.

Note:

TinyMCE is the name of the rich text editor that Kayako uses. You can learn more about it at [TinyMCE homepage](#).

Using tags to organize your helpdesk

Keeping your helpdesk organized can be a daunting task. One of the ways GFI HelpDesk can lessen that burden is with tags.

Using keywords to tag related content means you can filter your views to quickly find the information you need. Use tags to filter your tickets and live chats by topic, group users or organizations by industry, or set up any other kind of categorization that your team might need.

Once you create a tag, GFI HelpDesk displays it in a tag cloud in the sidebar, so you can filter your lists with a single click. In this topic, we'll explain how tags work in GFI HelpDesk, where you can use them, and how to start tagging things.

Understanding how tags work

Tags are a quick and powerful way to keep your helpdesk organized and easy-to-navigate. By tagging content with descriptive keywords or phrases, you can make it much easier for your team to find the information they're looking for – fast.

You can use tags on the following types of GFI HelpDesk content:

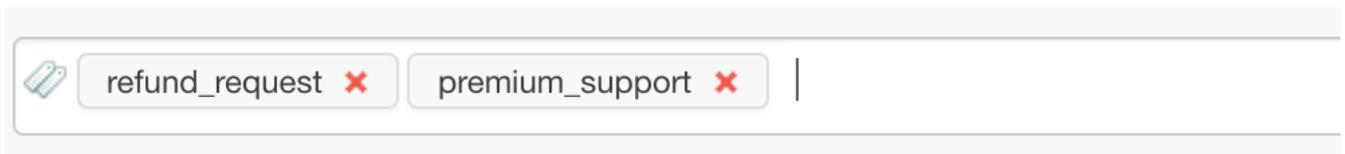
- » Support tickets
- » Live chat conversations
- » Offline messages and surveys
- » User accounts
- » Organization profiles

For each type of content, you'll see a field that looks like this:

Screenshot 45: Type here to insert tag

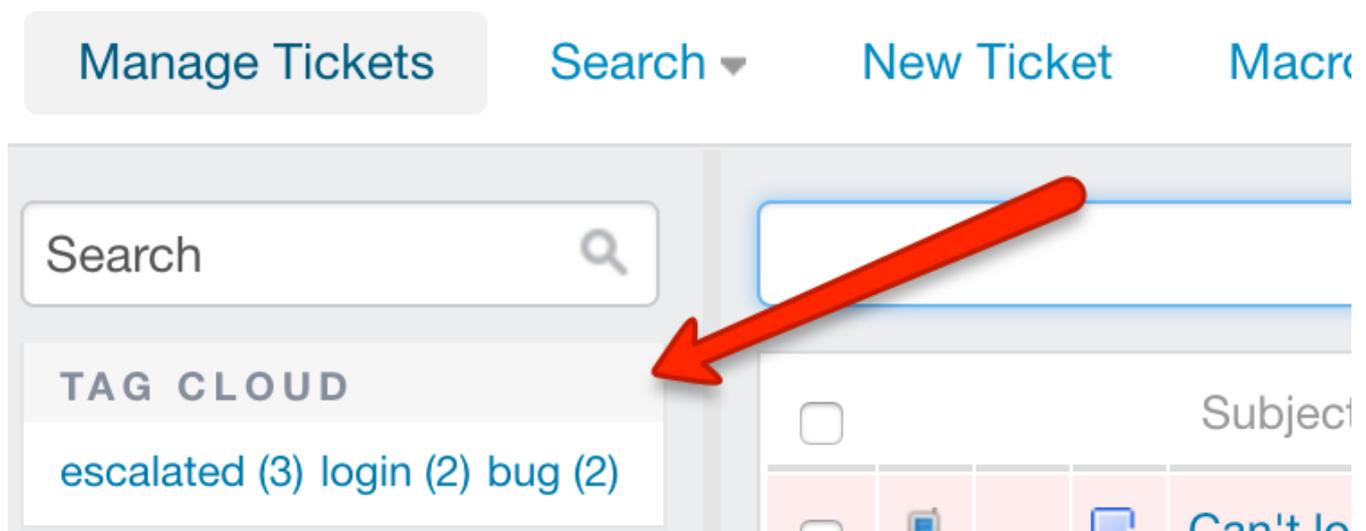
You can type any keyword you want to use. The field searches any tags you've already used, so it's easy to stick to a defined set of tags.

You can also use phrases, but they'll need to be joined together with hyphens or underscores:



Screenshot 46: To insert phrases as tags join with hyphen or underscores

Once you've created a tag on a piece of content, the tag appears in the sidebar of the staff control panel, whenever you're viewing that type of content.



Screenshot 47: Inserted tags appear in tag cloud in the left panel

Clicking on a tag immediately filters the queue – or list of whatever content you're viewing – and only display items with that tag.

NOTE:

You can also manually search using tags by typing 'tag:' followed by the keyword.

Now that we've covered the basics, let's walk through how to start tagging your content.

Tagging support tickets

Tagging tickets is probably the most common use of the feature. It can make navigating your support queue super-fast.

Note:

To tag content in GFI HelpDesk, you need a staff account with the **Tags** permission.

To tag a support ticket:

1. Sign into the **Staff Control Panel**.
2. Click **Inbox** on the sidebar.
3. Click on the ticket ID to open the ticket you would like to tag.
4. Click the **General** tab to locate the **Tags** field.
5. Enter the keyword or phrase you'd like to tag the ticket with.

NOTE:

Hitting the spacebar or return key creates the tag and let you add another.

The screenshot shows a ticket interface with several tabs: General, Reply, Forward, Follow-up, Billing, Release, Chats, and Calls. Below the tabs is a row of action buttons: Update, Add Note, Surrender, Assign, Print, Split, and Duplicate. The main content area displays the ticket title "I need help with my subscription" and its metadata: "Resolution due: 1d 16h 17m", "Created: 12 July 2017 10:21 AM", and "Updated: 17 July 2017 03:11 PM". Below this is a table with columns for DEPARTMENT, OWNER, TYPE, and STATUS. The values are Support, [redacted], Issue, and Open respectively. At the bottom, there is a text input field with the placeholder text "Start typing to insert tags...". A red arrow points to this input field.

Screenshot 48: Enter your tag keyword or phrase

6. Click **Update** to add the tags to the ticket.

The keyword or phrase you used is now displayed in the tag cloud in the sidebar. You can always remove a tag by editing the ticket and clicking **X** next to the tags you want to remove.

Note:

You can add tags to or remove tags from multiple tickets at once, by checking the box next to the tickets, and editing the tags in the **Mass Action** section.

Tagging live chat conversations, offline messages, and surveys

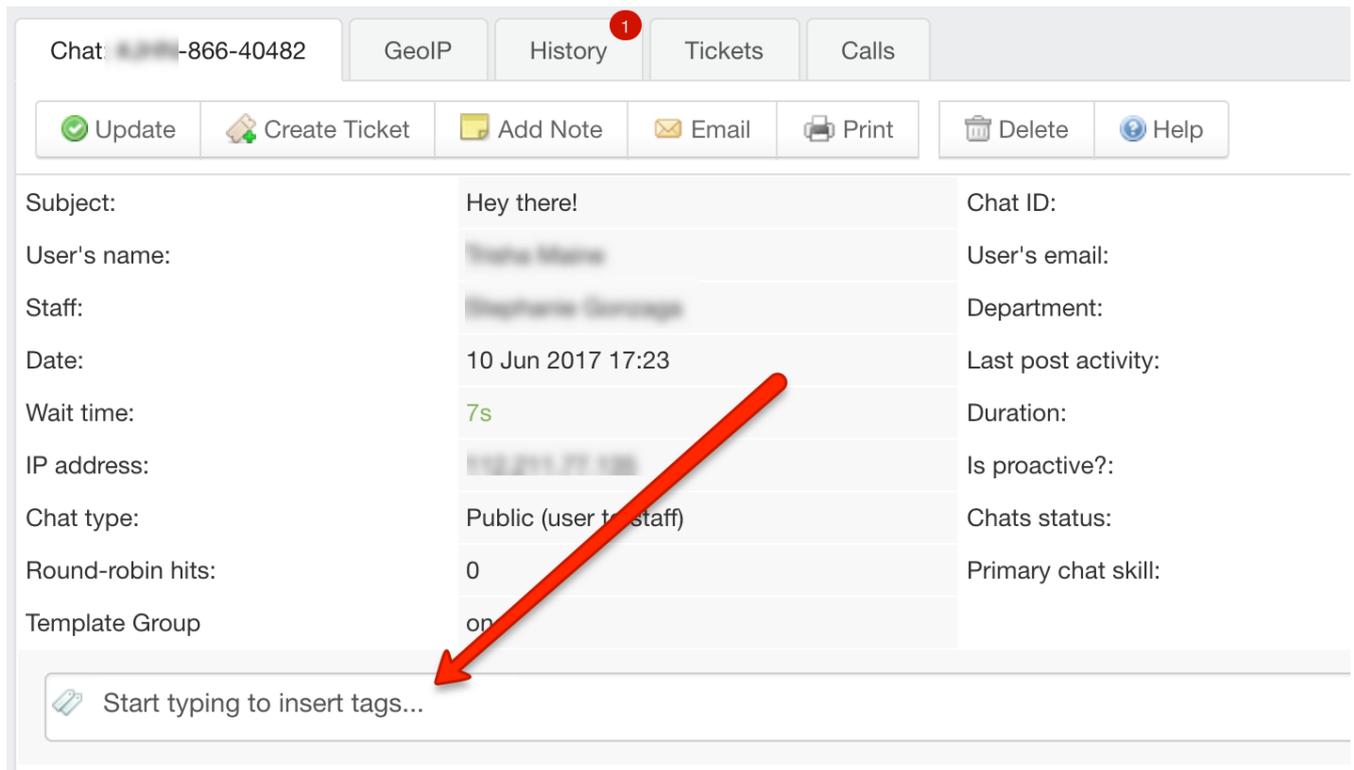
You can use tags to organize both full Live Chat conversations or offline messages and surveys. The steps are almost identical, so we'll cover them both here.

NOTE: To tag content in GFI HelpDesk, you need a Staff account with the 'Tags' permission.

To tag Live Chat content:

1. Sign into the Staff Control Panel.
2. Click **Live Support** on the main menu.
3. To tag a conversation, click **Chat History**, and to tag a post click **Message/Survey**.
4. Click on the chat/message ID to open it for editing.

5. Below the properties section is the Tags field.



Screenshot 49: Tag field

6. Enter the keyword or phrase you would like to use.

Note:

Hitting the spacebar or return key creates the tag and let you add another.

7. Click **Update** to add the tags.

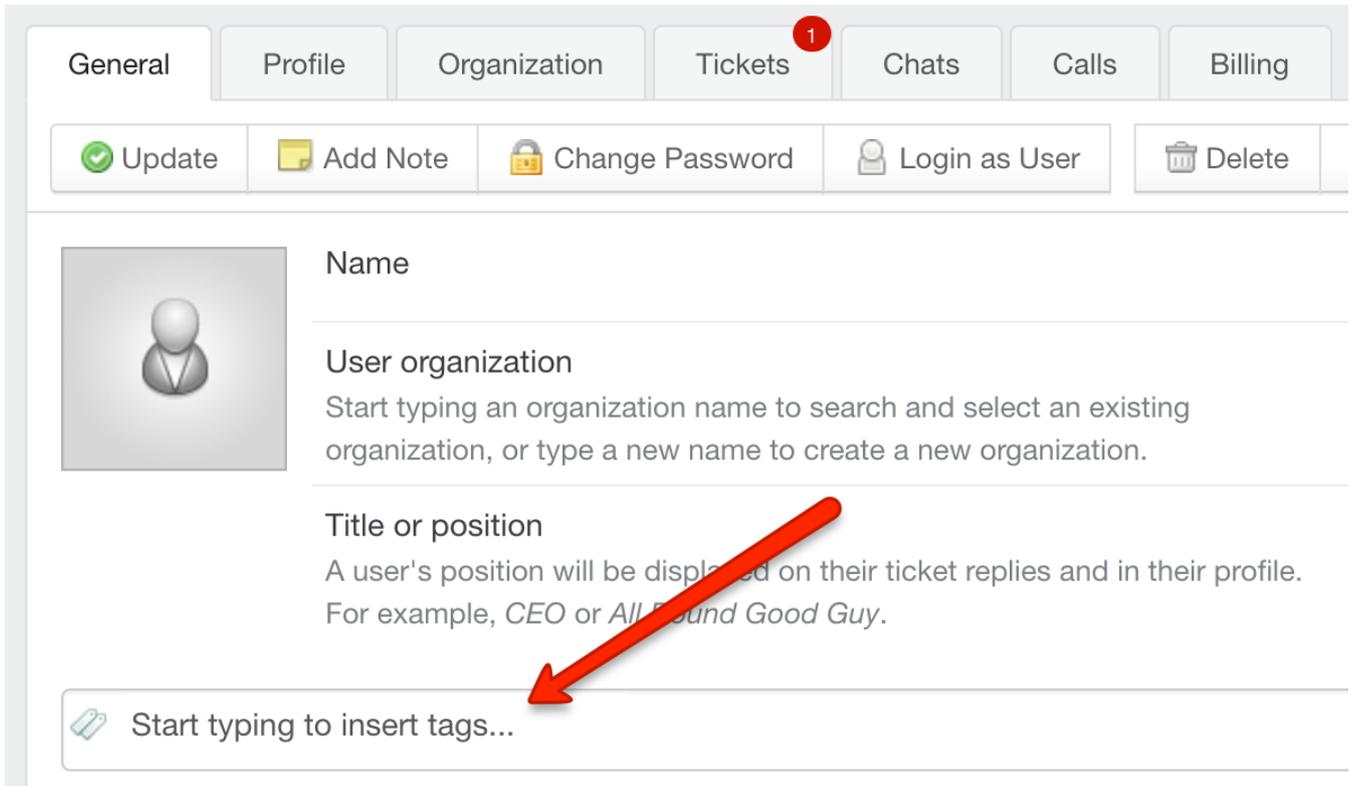
The keyword or phrase you used is now displayed in the tag cloud in the sidebar. You can always remove a tag by editing the chat or message and clicking the **X** next to the tag(s) you want to remove.

Tagging users and organizations

You can categorize both users and organizations using tags. The steps are almost identical, so we'll cover them both here.

To tag a user or organization:

1. Sign into the **Staff Control Panel**.
2. Click **Users** on the main menu.
3. To tag a user conversation, click **Manage Users**, or to tag an organization, click **Manage Organizations**.
4. Click on the user or organization to open it for editing.
5. Below the user or organization details is the **Tags** field.



Screenshot 50: Tags field

6. Enter the keyword or phrase you'd like to use.

NOTE:

Hitting the spacebar or return key creates the tag and let you add another.

7. Click **Update** to add the tags to the user or organization.

The keyword or phrase you used is now displayed in the tag cloud in the sidebar. You can always remove a tag by editing the user or organization and clicking the **X** next to the tag(s) you want to remove.

Linking related or duplicate tickets

Customers reach out to you for answers to questions, issues, and problems of all shapes and sizes. As your team provides support, they eventually start to see tickets come in that are about similar topics or even duplicate tickets that ask exactly the same question.

To make it easy to compare similar tickets and reuse solutions from resolved tickets, GFI HelpDesk has the option to link related or duplicate tickets. Having that information in easy reach means your team can answer questions and solve issues with speed and confidence.

The steps for linking and unlinking tickets are provided in this article, as well as adding to the types of links you can use.

Linking related or duplicate tickets

NOTE:

A Staff Account with the 'Tickets' permission is required to perform this task.

1. Sign in to the Staff Control Panel.

2. Click **Inbox** on the sidebar.

3. Check the box next to the tickets you would like to link.

The screenshot shows a list of tickets in a table. The first and fifth rows have their checkboxes checked. Below the table is a 'Page 1 of 1' indicator and a 'Mass Action' section with 'Update' and 'Help' buttons. Below these are several dropdown menus for actions like 'Move to department', 'Assign', 'Change ticket type', 'Change status', 'Change priority', 'Train Bayesian', and 'Link', all currently set to '-- No Change --'.

Checkbox	Attachment	Document Icon	Ticket Title	Priority	Phone Number	Assignee
<input checked="" type="checkbox"/>			Can't log in!	Low	190-62325	Sarah Miller
<input type="checkbox"/>			I need help with my subscription	High	524-14706	Kelly O'Brien
<input type="checkbox"/>			Hero images aren't showing up	Low	556-33100	Sarah Miller
<input type="checkbox"/>			Client having trouble with google rankings	Low	79-50502	Madge Giddens
<input checked="" type="checkbox"/>			Locked out of our account	Low	782-87095	Kelly O'Brien

Page 1 of 1

Mass Action

Move to department: -- No Change --

Assign: -- No Change --

Change ticket type: -- No Change --

Change status: -- No Change --

Change priority: -- No Change --

Train Bayesian: -- No Change --

Link: -- No Change --

Screenshot 51: Check the checkboxes next to the tickets you would like to link

4. Scroll down to the bottom of the screen to see the **Mass Action** section.

5. Click on the **Link** menu.

The screenshot shows the 'Mass Action' section with the 'Link' menu selected. A tooltip is displayed over the 'Link' menu, containing the text: '✓ -- No Change -- relates to duplicates was cloned as is derived from'.

Link

Flag

Add tags

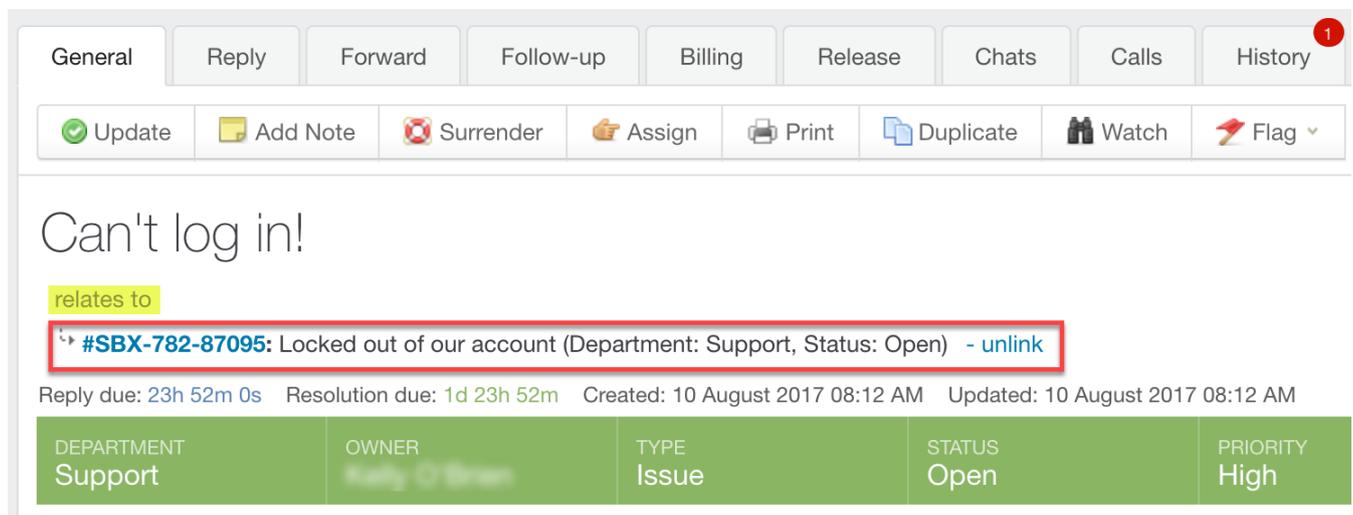
✓ -- No Change --
relates to
duplicates
was cloned as
is derived from

Screenshot 52: Click **Link**

6. Select the type of link that describes the relationship between the two tickets.

7. Click **Update** to link the tickets.

For easy referencing, the link information can be seen on the ticket (the IDs of the linked tickets, the relationship between the tickets, and a one-line summary of any linked tickets).



The screenshot shows a ticket interface with a navigation bar at the top containing tabs for General, Reply, Forward, Follow-up, Billing, Release, Chats, Calls, and History. Below the navigation bar is a toolbar with buttons for Update, Add Note, Surrender, Assign, Print, Duplicate, Watch, and Flag. The main content area displays the ticket title "Can't log in!" and a link labeled "relates to" pointing to "#SBX-782-87095: Locked out of our account (Department: Support, Status: Open) - unlink". Below the link, there is a summary bar with the following information: Reply due: 23h 52m 0s, Resolution due: 1d 23h 52m, Created: 10 August 2017 08:12 AM, Updated: 10 August 2017 08:12 AM. At the bottom, there is a table with the following data:

DEPARTMENT	OWNER	TYPE	STATUS	PRIORITY
Support	Help Desk	Issue	Open	High

Screenshot 53: The link information can be seen on the ticket

You can remove a link from a ticket by clicking **Unlink** in the header.

Adding or deleting ticket link types

Add or delete additional types of ticket links, depending on your needs. When creating a new type of ticket link, you must specify a name and a display order.

Note:

An **Admin Account** with the 'Ticket links (relationships)' permission is required to perform this task.

To edit the available ticket link types:

1. Sign into the **Admin Control Panel**.
2. Click **Tickets** in the sidebar, and then **Links**. The existing link types are displayed.
3. Check the box next to a type and click the **Trash** button in the toolbar at the top of the screen to delete a type.
4. Click on the **New** button to create a new link type.
5. In the **Link title** box, add a descriptive name for the link type.
6. Add a value for the type's **Display order**, to tell GFI HelpDesk wherein the list it goes.
7. Click the **Insert** button to add your new link type.

2.3 User accounts

Learn all about creating, configuring, and managing GFI HelpDesk user accounts.

Topics in this section:

2.3.1 Searching for users and organizations	63
2.3.2 Editing or Deleting Notes for an Organization	64
2.3.3 Error: "Staff count exceeded"	65
2.3.4 Importing Users from Other CRM or Mailing List	65
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2.3.6 Editing or deleting notes for a user account	66
2.3.7 Changing the staff or admin password through the helpdesk	67
2.3.8 Adding customers to an organization automatically	68
2.3.9 Creating staff accounts and assigning them to teams	68

2.3.1 Searching for users and organizations

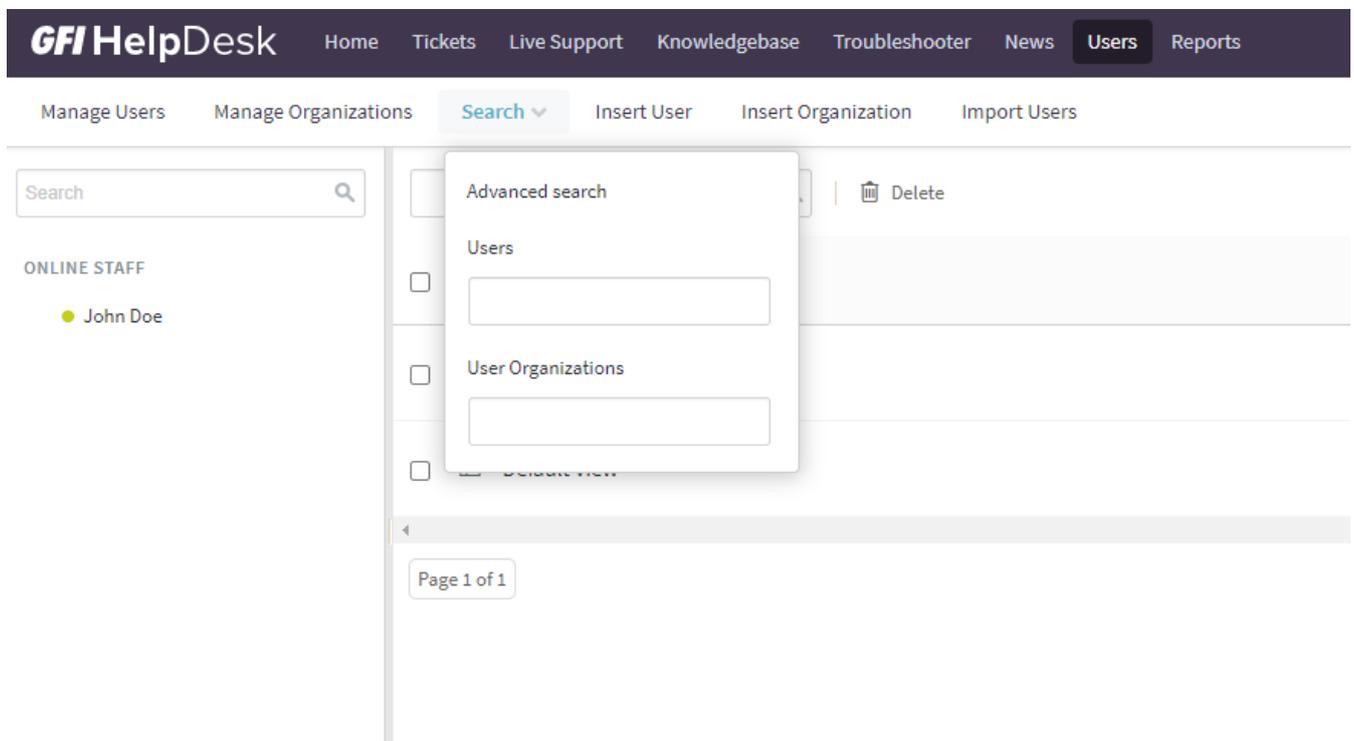
In the staff control panel, GFI HelpDesk has a search tool that can be used to locate users or user organizations in your helpdesk.

The advanced search feature allows you to filter the list of users and user organizations according to set criteria.

View and search users and organizations

In order to view and search the users and user organizations, follow the below steps:

1. Click **Search** on the users navigation menu bar. A drop down menu is displayed.



Screenshot 54: Searching for users and organizations

2. Specify a quick search criteria here. (You can also opt for an advanced search option).
3. If the user or organization that you have inserted in the quick search box are found, a new listing of these users or organizations is displayed, otherwise you get a zero result found message.

Advanced search option

Advanced search is used to generate more finite search results, enabling you to further narrow down your search results to speed up finding a user or organization.

To access the advanced search section, follow the below steps:

1. Click **Advanced Search** on the search menu. A page, where you can set the criteria for more granular searching, is displayed.
2. In **Search Criteria Options** choose whether your search should **Match All** or **Match Any** of the criteria for this search.
3. Next, insert the criteria by selecting the options from the dropdown menu according to your preferences. More than one search criteria can be added to the advanced search by clicking on the Insert Criteria button.
4. Click **Lookup** to begin the search as per the criteria inserted. If the user or organization that match your search criteria are found, a new listing is displayed.

2.3.2 Editing or Deleting Notes for an Organization

Notes are useful when you want to post a special message or instructions for a specific organization.

However, notes can get obsolete, and need to be edited or deleted from the organization. Deleting or editing a note for an organization requires you to go to the organization's profile in GFI HelpDesk.

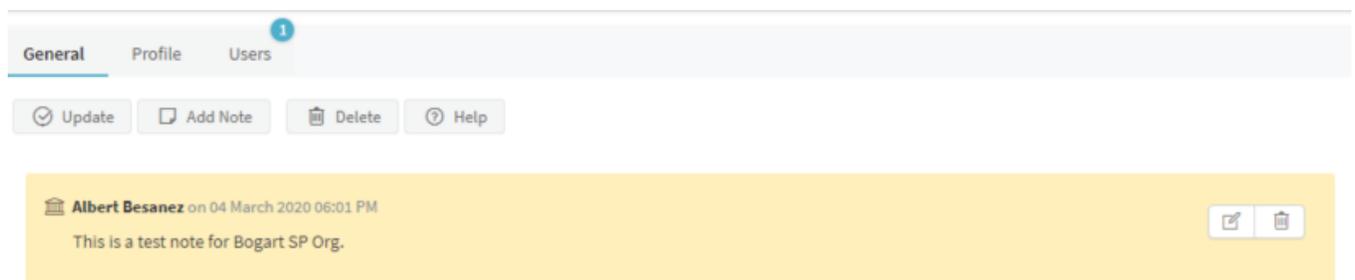
This topic provides the process to edit or delete notes from an organization in GFI HelpDesk.

When you add or create an organization in GFI HelpDesk, you have the option to add a note to the organization.

- » This note is visible (to staff users only) on all tickets created under a user account tagged to the organization.
- » This means that every time a staff user views a ticket from a user account tagged under the said organization, the note is displayed on the ticket.

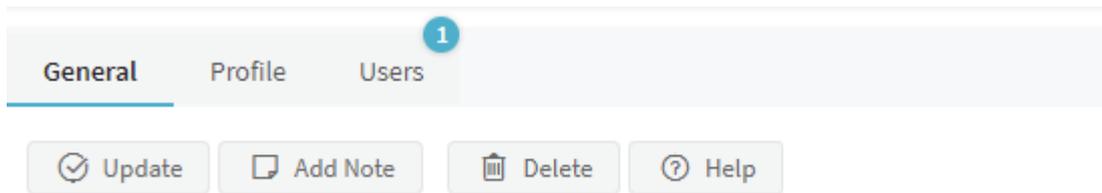
To edit or delete notes from an organization:

1. Log in to your **Staff CP** (that is, <https://<yourdomain>.gfihelpdesk.com/staff>).
2. Click **Users > Manage Organizations**.
3. Search for the **organization** you want to manage. Once located, click it to open the **organization profile**.
4. Under the **General** tab, you can see the note(s) added to the organization. Hover your mouse on to the note you wish to edit or delete.



Screenshot 55: Hover mouse on the note

- » To edit a note, select the edit icon edit.png. On the edit window, enter the new note and click **Save**.
 - » To delete a note, select the trash bin icon trash.png. Click **Ok** on the prompt to confirm the deletion.
5. Once you have finished editing or deleting the note(s), click **Update** to save the changes.



Screenshot 56: Click update

2.3.3 Error: "Staff count exceeded"

The number of staff members that you can add to GFI HelpDesk depends on the seats you have purchased. If your staff count exceeds the number of purchased seats, your helpdesk becomes inaccessible and you may receive the following message:

```
Staff count exceeded. (3 > 2). Please contact GFI HelpDesk Support for further assistance.
```

This topic provides instructions to resolve this issue.

Execute the below queries to disable extra staff members from the database:

```
UPDATE swstaff
SET isenabled = 0
WHERE fullname = [Full name of any of your staff members in your helpdesk];
```

```
DELETE
FROM swregistry
WHERE vkey='staffcache';
```

Note:

Disabled staff accounts do not count in the total seat allocation.

2.3.4 Importing Users from Other CRM or Mailing List

Many organizations maintain their clients' or end users' database, and they expect to use the same database in their GFI HelpDesk Helpdesk for the sake of user database integrity. Hence, the option to import the users' database from a different CRM or mailing list is introduced in GFI HelpDesk to facilitate this.

This topic guides you on how to import users from other CRM or mailing list.

Getting CSV file ready

To import user's database in GFI HelpDesk, the database backup should be in CSV file format.

The format for the CSV file should be as follows:

```
EmailAddress | FirstName | LastName | Organization | Phone Number | Salutation | Designation | Email Domain Filter |
Address | City | State | Postal code | Country | Phone | Fax | Website
```

For example:

jack@abc.com, Jack, Russel, GFI HelpDesk, 9876942040, Mr, Manager, email@organization.com, Sco 123 G.T Road, Jalandhar, Punjab, 144001, India, 01812934839, 01813231432, www.organization.com

NOTE:

The first three fields are mandatory. The columns must be comma separated as shown in the above example. They cannot be separated by semi-colon.

Importing users

Once your CSV file is ready, you can import the users in your GFI HelpDesk from: **Staff control panel > Users > Import Users**.

Choose the CSV file where you want to import the users.

When your import is done, you can check to confirm that the users have been created successfully by going to Staff CP and navigating to **Users > Manage Users and Manage Organizations**.

2.3.5 Merging user accounts

Your customers can submit requests using different email addresses. It's possible that duplicate end-user accounts might be created.

While merging several user accounts, one user account should be marked as the primary user account. The primary user account acts as a base of the merged user by retaining all the basic details such as name, phone number, address and company details.

Merging moves all the tickets and contact information from the secondary contact(s) into the primary contact. The secondary contact(s) is deleted after merging and cannot be restored.

Below are the steps to merge contacts:

1. Login to your GFI HelpDesk Staff Control Panel.
2. Click on **Users** in the top menu bar and then click on the **Manage Users** option in the sub menu bar.
3. Select the user accounts you are looking to merge.
4. In the **Mass Action** section, click on the **Merge** tab.
5. Select the **Primary User** in the drop down list and click on the **Merge** button on the top.
6. Your users contacts is now merged.

2.3.6 Editing or deleting notes for a user account

When you add or create a user account in GFI HelpDesk, you have the option to add a note to the user account. This note is visible in all the tickets created under that user account to the staff users only.

This means that every time a staff user is viewing a ticket from the said user account, the note is displayed on the ticket.

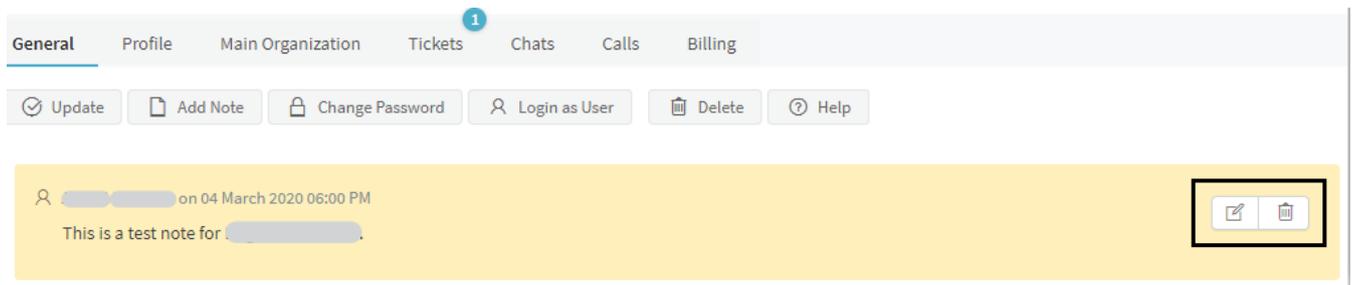
Notes are useful when you want to post a special message or instructions for a specific user. However, notes can get obsolete, and you may wonder how to edit or delete a note.

Deleting or editing a note for a user account requires you to go to the user's profile in GFI HelpDesk.

This topic provides instructions on how to edit or delete notes for a user account in GFI HelpDesk.

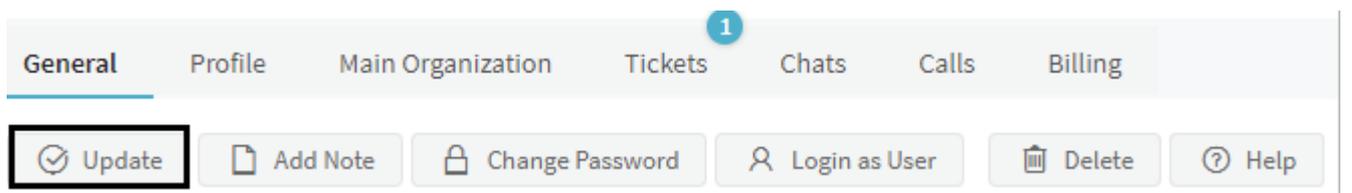
Below are the steps to edit or delete notes for a user account:

1. Log in to your Staff CP (for example, <https://<yourdomain>.gfihelpdesk.com/staff>).
2. Go the **Users > Manage Users**.
3. Search the user account you want to manage and click on it to open the user account profile.
4. Under the **General** tab, you can see the note(s) added to the user account. Hover your mouse on the note you wish to edit or delete.
 - » To edit a note, select the edit icon mceclip1.png. On the edit window, enter the new note > click **Save** when done.
 - » To delete a note, select the trash bin icon mceclip2.png. Click **OK** on the prompt to confirm the deletion.



Screenshot 57: Hover mouse over the note you want to edit

5. Once you are done editing or deleting the notes, click **Update** to save the changes.



Screenshot 58: Click update

2.3.7 Changing the staff or admin password through the helpdesk

If you are unable to log in to GFI HelpDesk or getting the Invalid username or password error, you may need to reset the password. Admin users can reset the passwords through the helpdesk.

This topic provides step-by-step instructions on how to change the staff or admin password through the helpdesk.

POINTS TO REMEMBER!

- » Only administrators can reset the user's password on the account through the helpdesk.
- » Admin users can reset another admin user's password through the helpdesk.
- » Please contact the support team by clicking the Submit a Ticket button at the top of your support page.
- » Please send us your Order ID or Transaction ID as part of the authentication process.

Follow the below steps to change the password:

1. Log in to your GFI HelpDesk admin console.
2. Go to the Staff tab and click on **Manage Staff**.
3. Select the staff member, or you can use the search bar to find the staff member.



Screenshot 59: Select or search for staff

4. Scroll down to the password section and enter the new password on the **Password** and **Re-enter password** boxes.

Password

To change this user's password, enter a new password here. Leave blank to leave the existing password in place.

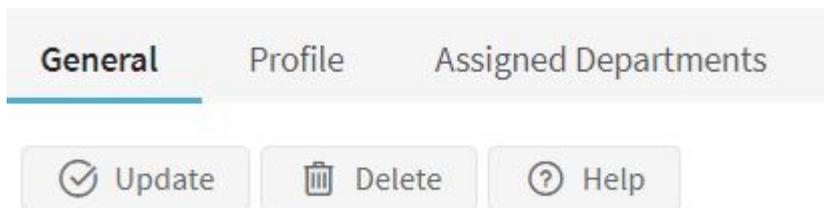
Password requirements: Minimum length: 1 characters, Minimum digits: 0, Minimum symbols: 0, Minimum uppercase letters: 0

Re-enter password

To make sure there are no typos, please re-enter the password.

Screenshot 60: Enter new password

5. Click the **Update** button at the top to save the changes.



Screenshot 61: Click update

2.3.8 Adding customers to an organization automatically

Adding users to a particular organization is helpful if you want to run reports or filter users according to their organization.

You can do so automatically by specifying the email domain name under the Organization. This would mean that whenever a user with that email domain registers at GFI HelpDesk, he would automatically get added to the Organization.

The settings can be found under **Staff CP > Users > Manage Organizations > Select the Organization > General Tab > Email domain filters**.

2.3.9 Creating staff accounts and assigning them to teams

Staff user accounts are created and managed within the admin control panel. A staff user account can be a regular staff user account (that has access only to the staff control panel) or it can be an administrator account (that has access both to the staff control panel as a staff user and the admin control panel as an admin user).

Further, the staff user accounts can be categorized in teams to create different access levels, which are also managed within the administrator control panel.

Teams can be assigned permissions which all staff users inherit if specified for the staff user account. Additionally, if specified, a staff user account can have individual permissions and still be a member of a team. All staff user accounts must be a member of a team, and the default two teams are Staff and Administrator.

A staff user becomes an administrator user when added to the administrator team. You may specify the permissions in Admin CP by navigating to **Staff > Manage Teams**.

There are different permissions provided which can be assigned to the staff according to the team type.

For staff team, there are 49 different permissions that are specified regarding the action that are performed in Staff CP.

For the administrator team, there are 66 different permissions that are specified regarding the actions that are performed in Admin CP.

2.4 Reports KQL

Get detailed reports of the happenings in your helpdesk with GFI HelpDesk reporting.

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2.4.1 Creating common SLA reports with KQL

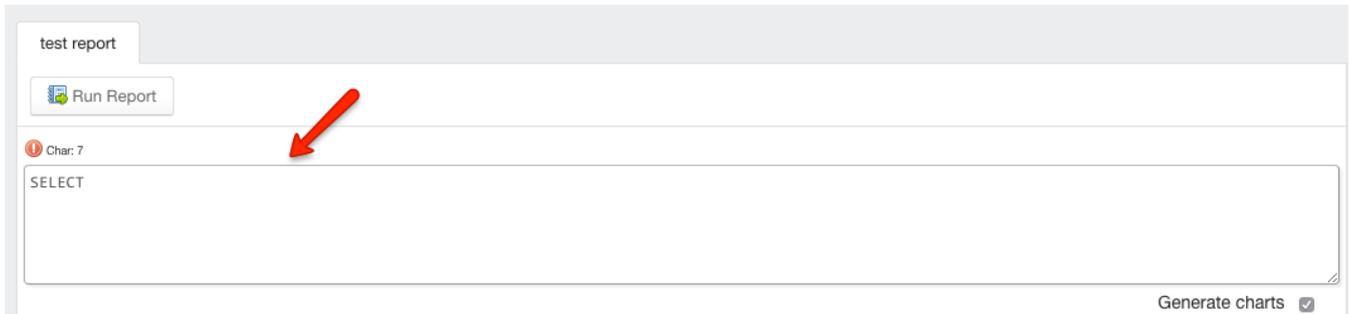
Service level agreements (SLAs) and escalations both play a significant role in the support industry. It is one of the ways to ensure you are providing excellent customer service in a timely manner.

Using GFI HelpDesk's reporting query language (KQL), you can build reports that gives you an insight into your SLA and escalations metrics.

In this topic, you can learn how to build a few commonly requested reports.

To create the report, follow the steps mentioned below:

1. Log into the staff control panel and click **Reports** in the top navigation bar.
2. Click the **New Report** link that appears below it.
3. In the New Report pop-up that appears, enter a descriptive title for your report in the Title field.
4. From the **Primary Source** dropdown select **Tickets**.
5. Click **Next** to create your blank report.
6. On the next page, you can see a text area with the word **SELECT** in it. Here you can enter the KQL query that can pull your report.



Screenshot 62: Enter the KQL query here

7. Based on the report you want to create, copy the query code, and paste it into the text area on your report page.

» **Overdue tickets**

```
SELECT 'Tickets.Ticket Mask ID', 'Tickets.Status', IF(('Tickets.Reply Due Date' <= DateNow()) AND ('Tickets.Reply Due Date' != ''), 'Overdue', 'Not Overdue') as 'OVERDUE Status' FROM 'Tickets' WHERE 'Tickets.Creation Date' = ThisMonth() AND 'Tickets.Is Resolved' = '0'
```

» **Escalated tickets, by department**

```
SELECT SUM(IF(('Tickets.Is Escalated' = '1') ,1,0)) AS Escalated , SUM(IF(('Tickets.Is Escalated' = '0') ,1,0)) AS 'Non-Escalated' FROM 'Tickets' WHERE 'Tickets.Creation Date' = ThisMonth() GROUP BY 'Tickets.Department'
```

Note:

You can also set up an SLA based on Ticket Priority or Ticket Status by specifying it in the criteria. This helps in automatically changing the SLA plan when a ticket is moved from one priority to another or from one status to another.

» **Average first response time for tickets, overall**

```
SELECT AVG('Tickets.First Response Time') FROM 'Tickets' WHERE 'Tickets.Creation Date' = ThisMonth() AND 'Tickets.First Response Time' > '0'
```

Note:

Default reports are available for an average of first response time. You can find these by navigating to **Staff Control Panel > Reports > Manage Reports** > then search with First Response. All related reports are listed.

» **Average response time for tickets created today**

```
SELECT AVG('Ticket Posts.Response Time') FROM 'Ticket Posts' WHERE 'Ticket Posts.Creation Date' = today() AND 'Ticket Posts.Creator' = 'Staff' AND 'Ticket Posts.Response Time' > '0' Group by 'Ticket Posts.Full Name'
```

» **Breakdown of tickets that have been waiting on a reply for 24 hours, 24-48 hours, and more than 72 hours**

```
SELECT Sum(IF('Tickets.Last User Reply' <= '86400', 1,0)) AS 'Within 24 hours', Sum(IF('Tickets.Last User Reply' > '86400' AND 'Tickets.Last User Reply' <= '172800', 1,0)) AS ' 24-48 hours', Sum(IF('Tickets.Last User Reply' > '259200', 1,0)) As 'More than 72 hours' FROM 'Tickets' WHERE 'Tickets.Status' = 'Open' AND 'Tickets.Creation Date'>= Date_Sub(NOW(), INTERVAL 5 Day)
```

» Average response time for ticket posts created during working hours

```
SELECT AVG('Ticket Posts.SLA Response Time') FROM 'Ticket Posts' WHERE 'Ticket Posts.Creation Date' = ThisMonth() AND 'Ticket Posts.Creator' = 'Staff' AND 'Ticket Posts.Response Time' != '0' GROUP BY Y('Ticket Posts.Full Name')
```

8. Click **Run Report** to see your results.

2.4.2 Introduction to building and running reports

Reports in GFI HelpDesk lets you access the huge amount of data in your helpdesk and turn that data into useful information.

This topic introduces you to how building and running reports are processed.

Accessing and Running Reports

1. Login to the **Staff Control Panel**.
2. Go to **Reports** on the top navigation bar. From here you can access all of your Helpdesk Reports, which can be searched, filtered by category or filter out the reports you have created.
3. Click on a report title to edit, run, export or schedule the report.
4. Click **Run Report** to process the report. The results of the report (if there are any) are rendered in a table.
5. Click **Schedule** to let you specify how often the report should be sent to your email. The schedule (if successfully created) becomes available for editing or removal under the Schedules tab.

Creating Reports

Although your GFI HelpDesk Helpdesk comes with a long list useful reports out-of-the-box, unlike other helpdesk reporting systems, GFI HelpDesk allows you to tweak and create your own, almost without limitation.

Kayako Query Language (KQL)

The syntax used to define a report. **KQL** is used to specify the data you want to include in your reports and how the data should be displayed. It is flexible and powerful, but still easy to grasp.

See [Report Types](#) for information on the types of report you can generate, and the KQL needed to process it.

Report Writer

To get started, simply place your cursor inside of the text editor and start with the first suggestion. You can use your mouse or arrow keys to make a selection. It's as easy as that!

Using **Report Writer**, you can create and modify reports without getting bogged down in syntax.

The Report Writer makes creating your own reports using KQL really simple. It checks what you type on-the-fly and automatically provides suggestions about what you may need to type next. In fact, the auto-completion and suggestions are so comprehensive that you can create reports using just your mouse or up and down arrow keys, so you could create a report without typing or knowing any syntax at all.

Report Writer checks your syntax for errors, providing specific error messages where possible.

2.4.3 Report types in GFI HelpDesk

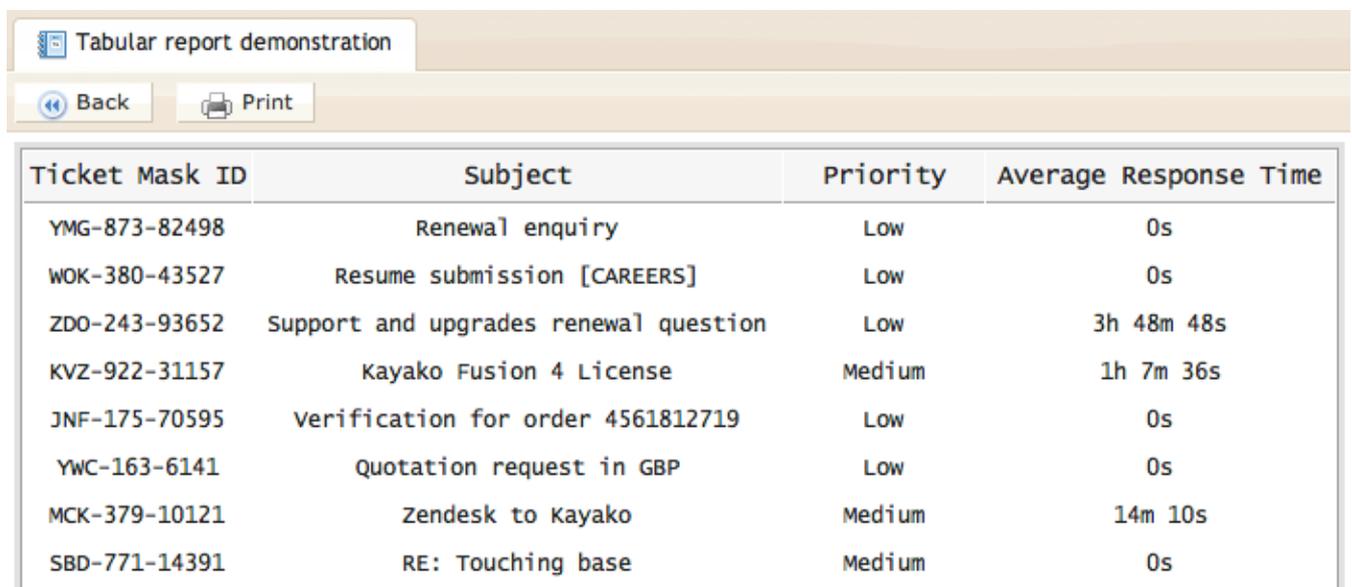
GFI HelpDesk reports are capable of producing various types of report layout. The way a report is displayed depends on how you structure your report query using a KQL statement. This article discusses the different report types available in GFI HelpDesk.

Tabular report

The tabular report is the simplest type of report, with a single heading row followed by information. The following KQL statement was used to produce a tabular report.

Tabular report example

```
SELECT 'Tickets.Ticket Mask ID','Tickets.Subject','Tickets.Priority',  
'Tickets.Average Response Time' FROM 'Tickets' WHERE 'Tickets.Status'='Open'  
AND 'Tickets.Creation Date'='Today()
```



Ticket Mask ID	Subject	Priority	Average Response Time
YMG-873-82498	Renewal enquiry	Low	0s
WOK-380-43527	Resume submission [CAREERS]	Low	0s
ZDO-243-93652	Support and upgrades renewal question	Low	3h 48m 48s
KVZ-922-31157	Kayako Fusion 4 License	Medium	1h 7m 36s
JNF-175-70595	Verification for order 4561812719	Low	0s
YWC-163-6141	Quotation request in GBP	Low	0s
MCK-379-10121	Zendesk to Kayako	Medium	14m 10s
SBD-771-14391	RE: Touching base	Medium	0s

Screenshot 63: Tabular report demonstration

Summary table report

The summary table report is intended for use when performing calculations - such as a count of tickets, an average of customer satisfaction ratings and the oldest tickets (maximum values).

The following KQL statement counts all of the tickets in the specified departments, and then groups the counts by the department to produce a summary table. A summary table includes at least one 'GROUP BY' (this is what differentiates it from a simple tabular report).

Simple summary table report

```
SELECT COUNT(*)ASTicketsFROM'Tickets' WHERE 'Tickets.Department' IN  
('Support','Sales','Billing') GROUP BY'Tickets.Department'
```

Simple summary report test	
Back	Print
Department	Tickets
Billing	3063
Sales	3462
Support	4452

Screenshot 64: Simple summary report test

We can go further than this and add nested groups to the summary table. We can take the same KQL statement as above, and add some more groupings to the end of the statement to break the ticket counts down by department, the priority and then by status.

Summary table report

```
SELECT COUNT(*)ASTicketsFROM'Tickets'WHERE'Tickets.Department' IN ('Support','Sales','Billing') GROUP BY'Tickets.Department','Tickets.Priority','Tickets.Status'
```

Summary report test			
Back	Print		
Department	Priority	Status	Tickets
Billing	Critical	On Hold	206
		Open	1
	Emergency	On Hold	26
		Open	1
	High	On Hold	277
		Open	1
	Low	On Hold	2089
Open		2	
Sales	Urgent	On Hold	142
		Open	2
	Medium	On Hold	2300
		Open	2
	Low	On Hold	853
		Open	2
High	On Hold	182	
	Open	2	

Screenshot 65: Summary report test

There is no limit to the depth of nests you can include in your report.

Grouped Tabular Report (Multigroup)

The grouped report (using the **MULTIGROUP** operator) can be used to produce a list of tables within one report and using one statement. For example, you may like to see a list of tickets assigned to Rajiv Sharma, broken down by the day the tickets were created.

Grouped report example

```
SELECT 'Tickets.Ticket Mask ID','Tickets.Department','Tickets.Owner' FROM 'Tickets' WHERE 'Tickets.Owner'='Rajiv Sharma' AND 'Tickets.Creation Date'= LastMonth()  
MULTIGROUP BY 'Tickets.Creation Date':DayName
```

Multigroup report test

Back Print

Friday

Ticket Mask ID	Department	Owner
OKR-194-4801	Billing	Rajiv Sharma
LRY-645-4683	Sales	Rajiv Sharma
WLG-349-8417	Sales	Rajiv Sharma

Monday

Ticket Mask ID	Department	Owner
KTS-420-4341	Sales	Rajiv Sharma
THI-578-7503	Sales	Rajiv Sharma
ZOJ-989-8882	Sales	Rajiv Sharma
GPB-411-2230	Sales	Rajiv Sharma
CQT-553-4508	Sales	Rajiv Sharma
NVZ-912-5587	Sales	Rajiv Sharma

Screenshot 66: Multigroup report test

Matrix Reports

» Simple matrix report

A matrix report is a grid report. At its simplest, it contains one row of labels, one column of labels and information in the middle. For example, you could create a matrix report displaying the number of tickets created within each of your department on each day of the last seven days.

Simple matrix report example

```
SELECT COUNT(*) FROM 'Tickets' WHERE 'Tickets.Creation Date'= Last7Days() GROUP BY  
X ('Tickets.Department'), Y('Tickets.Creation Date':DayName)
```

	Sales	Development	HR	Support	Leads	Receipts
Friday	162		5	9	100	72
Monday	15		8	8	90	98
Saturday	1		1		57	33
Sunday	7	1	3		59	68
Thursday	39	4	9	16	162	169
Tuesday	12		7	10	99	86
wednesday	6	3	7	6	135	89

Screenshot 67: Simple matrix report

The KQL statement of a matrix report must contain an X() and Y() grouping. The X() indicates what is your columns (horizontal) and the Y() indicates what is your labels (vertical).

» Nested matrix report

Just like the simple matrix report, a nested matrix report is a grid report. However, you can add additional X() and Y() operators to introduce nesting (or grouping) to the columns and labels.

For example, you could create a nested matrix report similar to the example above. However, as well as just breaking the tickets count down by department day of the week, we can also group the ticket counts by priority.

Nested matrix report example

```
SELECT COUNT(*) FROM 'Tickets' WHERE 'Tickets.Creation Date'= Last7Days() GROUP BY
X('Tickets.Department'), X('Tickets.Priority'), Y('Tickets.Creation Date':DayName)
```

	Sales			Support		
	High	Low	Medium	High	Low	Medium
Friday	17	50	190	40	200	46
Monday	9	49	135	39	201	33
Saturday	4	16	25	11	45	7
Sunday	8	17	47	5	32	16
Thursday	15	88	151	47	188	49
Tuesday	13	102	167	31	178	35
wednesday	6	71	276	43	197	45

Screenshot 68: Nested matrix report

As another example, rather than just counting tickets created within the last seven days, we can count tickets created in the last month, grouped by week and then by day of the week.

Another nested matrix report example

```
SELECT COUNT(*) FROM 'Tickets' WHERE 'Tickets.Creation Date'= LastMonth() GROUP BY
X ('Tickets.Department'), X('Tickets.Priority'), Y ('Tickets.Creation Date':Week),
Y('Tickets.Creation Date':DayName)
```

The screenshot shows a report titled "Nested matrix report" with "Back" and "Print" buttons. The table below displays ticket counts for two weeks, grouped by day of the week. The columns are categorized into Sales and Support, each with High, Low, and Medium priority counts.

		Sales			Support		
		High	Low	Medium	High	Low	Medium
36	Friday	4	5	98	12	42	13
	Monday	3	8	23	7	52	6
	Saturday	1	5	7	5	16	
	Sunday	3	5	10	1	7	4
	Thursday	2	11	58	8	34	12
	Tuesday	2	58	29	9	36	5
	wednesday	1	20	18	8	89	16
37	Friday	6	15	30	2	40	7
	Monday	2	14	58	12	77	9
	Saturday	1	5	5	4	6	3
	Sunday		3	15	3	11	2
	Thursday	4	18	29	9	41	12
	Tuesday	3	12	89	5	45	9
	wednesday	2	17	195	8	35	11
	Friday	3	10	18	10	38	9

Screenshot 69: Another nested matrix report

There is no limit to the depth of nests you can include in your report.

2.4.4 Introduction to Kayako Query Language (KQL)

Your GFI HelpDesk helpdesk contains a variety of out-of-the-box reports, so if you're not comfortable writing your own reports using the Kayako Query Language, don't worry. See our Introduction to building and running reports article for more information.

A line of KQL (a KQL statement) specifies what information to include in your report, on what conditions and how to display the information. Every report in your GFI HelpDesk helpdesk is defined by a KQL statement, and each report can be opened and its KQL statement tweaked or copied as a template for another report.

If you are familiar with SQL, you can treat KQL almost exactly the same (except we have added some Kayako-specific features).

Basic KQL statement

The most basic KQL statement looks like this:

```
SELECT 'Tickets.Ticket Mask ID', 'Tickets.Subject' FROM 'Tickets'
```

This example statement is valid contains the complete minimum components required for a report. The result of this report is a list of every ticket and its corresponding ID and subject in your helpdesk.

The statement has two components:

- » **SELECT** - Every statement starts with a `SELECT`. With it, you are telling Reports what fields and information to fetch from your helpdesk.
- » **FROM** - Each `SELECT` is preceded by a `FROM`, which explicitly tells Reports the data sources you wish to use in your report. As we are only using the Tickets source in this example, this is the only one we need to specify.

Sources and fields

If you're familiar with database terminology, a 'source' is a table and a 'field' is a field.

In the example above we had two things - a source and a couple of fields. Every source has a list of fields.

```
SELECT 'Tickets.Ticket Mask ID', 'Tickets.Subject', 'Users.Fullname' FROM 'Tickets', 'Users'
```

In this new example, we have the following sources:

- » Tickets
- » Users

And the following fields:

- » Tickets.Ticket Mask ID
- » Tickets.Subject
- » Users.Fullname

Even though you are asked to select a primary source when creating a new report, it is possible to reference multiple sources within your KQL statement. You don't need to worry about the way this source linking is done - it is automatically taken care of. All you need to do is specify the respective FROMs sources for the fields you are `SELECT`ing.

The Report Writer automatically suggests the sources you need to include in your statement.

KQL fields

For a complete list of tables and fields used in KQL, refer to [KQL tables and Fields \(PDF\)](#).

Custom fields

Since 4.52 custom fields can be referenced as follows: 'Source . Custom Fields . Optional Group . Field Name'.

Custom fields can be retrieved in KQL using `CUSTOMFIELD()` function. For example:

```
SELECT 'Tickets.Ticket Mask ID', 'Tickets.Subject', 'Users.Fullname', CUSTOMFIELD('Tickets', *) FROM 'Tickets', 'Users'
```

The `CUSTOMFIELD()` function accepts two optional and one mandatory argument:

- » **Source** (optional)
- » **Custom field group title** (optional)
- » **Custom field title, custom field name** or *

Thus the above KQL produces a list of all custom fields under the Tickets source. If source is omitted the primary source is used. If custom field group title is omitted a custom field is searched in all groups of source.

The third argument can be custom field title (for example, 'Role'), **custom field name** (for example, '6nvjvi53lbh2') or * (all custom fields).

It is safe to use `CUSTOMFIELD (Source, *)` if there are no custom fields associated with source.

Currently, custom fields are available for the following sources:

- » Users
- » User Organizations
- » Chats
- » Tickets
- » Ticket Billing

See also the [KQL Condition and Operator Reference](#).

Conditionally selecting information (WHERE)

The example KQL statement used above:

```
SELECT 'Tickets.Ticket Mask ID', 'Tickets.Subject', 'Users.Fullname' FROM 'Tickets', 'Users'
```

Would produce a report that listed every single ticket in the helpdesk, including the ticket ID, subject and user's name. We can refine this report to include tickets that match some specific criteria.

For example, the following KQL statement includes a WHERE and some conditions. It only includes tickets that belong to the Sales department and are set to the status Open:

```
SELECT 'Tickets.Ticket Mask ID', 'Tickets.Subject', 'Users.Fullname' FROM 'Tickets', 'Users' WHERE 'Tickets.Department'='Sales' AND 'Tickets.Status'='Open'
```

Multiple conditions

The **AND** operator in the example above indicates that tickets must match both conditions. We could also use the **OR** operator to indicate optional conditions. The example below produces a report listing tickets set to the status Open that belong to either the Support department or the Sales department:

```
SELECT 'Tickets.Ticket Mask ID', 'Tickets.Subject', 'Users.Fullname' FROM 'Tickets', 'Users' WHERE ('Tickets.Department'='Sales' OR 'Tickets.Department'='Support') AND 'Tickets.Status'='Open'
```

Because we grouped the department condition in brackets, it gets treated as one condition. This KQL statement contains the following conditions:

- » ('Tickets.Department' = 'Sales' OR 'Tickets.Department' = 'Support')

AND

- » 'Tickets.Status' = 'Open'

A ticket is included in our report only if both of these conditions are met. For example:

Ticket ID	Ticket Status	Ticket Dept.	Included in the report?	Why?
#ABC-123-0001	Open	Sales	✓	Meets both conditions
#ABC-123-0002	Open	Billing	✗	Fails to meet the condition ('Tickets.Department' = 'Sales' OR 'Tickets.Department' = 'Support')
#ABC-123-0003	Closed	Support	✗	Fails to meet the condition 'Tickets.Status' = 'Open'
#ABC-123-0004	Open	Support	✓	Meets both conditions

Functions

For a list of functions, see the [KQL Condition and Operator Reference](#).

Shortcuts

For a list of shortcuts, see the [KQL Condition and Operator Reference](#).

ORDER BY (ordering results)

The **ORDER BY** operator orders information in tabular reports. The following KQL statement produces a list of tickets including the ticket ID, subject and priority. The list of tickets is sorted by priority:

```
SELECT 'Tickets.Ticket Mask ID', 'Tickets.Subject', 'Tickets.Priority' FROM 'Tickets' WHERE 'Tickets.Status'= 'Open' AND 'Tickets.Creation Date'= Today() ORDER BY 'Tickets.Priority'
```

An **ORDER BY** operator can be used with a **GROUP BY** or **MULTIGROUP BY** operator, as follows:

```
SELECT 'Tickets.Ticket Mask ID', 'Tickets.Subject', 'Tickets.Priority' FROM 'Tickets' WHERE 'Tickets.Status'= 'Open' AND 'Tickets.Creation Date'= Today() MULTIGROUP BY 'Tickets.Department' ORDER BY 'Tickets.Priority'
```

Grouping results (GROUP BY)

The **GROUP BY** operator groups results together. Its main purpose is for use in a summary table type of report. Whereas a regular tabular report (which would be produced from the example KQL statements up until now) produces lists of information, a summary table consolidates information.

Let's say that we want to count all of the Open in the helpdesk. Our KQL statement would look like this:

```
SELECT COUNT(*) FROM 'Tickets' WHERE 'Tickets.Status'= 'Open' AND 'Tickets.Department'
```

And would produce something fairly basic, which looked like this:

The screenshot shows a report interface with a title bar 'Open ticket count'. Below the title bar are two buttons: 'Back' and 'Print'. The main content area displays a table with one row containing the text 'COUNT(*)' and the value '22'.

Screenshot 70: Open ticket count

Using **GROUP BY** we could break this count down by department, so we'll retrieve the count of **Open** tickets across our departments. The revised KQL statement is:

```
SELECT COUNT(*) FROM 'Tickets' WHERE 'Tickets.Status'='Open' AND 'Tickets.Department' GROUP BY 'Tickets.Department'
```

And would produce a report which looked like this:

Department	COUNT(*)
Billing	3
Sales	5
Support	13

Screenshot 71: Grouped by department

It is possible to **GROUP BY** multiple fields to break the summary table report down into even more detail. The following KQL statement will **GROUP BY** ticket department and then by priority:

```
SELECT COUNT(*) FROM 'Tickets' WHERE 'Tickets.Status'='Open' AND 'Tickets.Department' GROUP BY 'Tickets.Department', 'Tickets.Priority'
```

Department	Priority	COUNT(*)
Billing	High	1
	Medium	1
Sales	Emergency	2
	Low	4
Support	High	2
	Low	4
	Medium	4

Screenshot 72: Grouped by multiple fields

For more information on report types and layouts, see [Report Types](#).

GROUP BY X(), Y() for matrix reports

Since 4.52 **X()** and **Y()** are also supported as post-modifiers, for example, `GROUP BY 'Tickets.Department') X, 'Tickets.Owner' Y`.

In order to produce a matrix report (see [Report Types](#)), a KQL statement must specify a **GROUP BY X(), Y()** (because each matrix report has at least one row of headings and one column of row labels).

For example, the following KQL statement produces a matrix report showing the count of Open tickets in departments (X, the headings) against ticket owners (Y, the rows):

```
SELECT COUNT(*) FROM 'Tickets' WHERE 'Tickets.Status'= 'Open' GROUP BY X('Tickets.Department'), Y('Tickets.Owner')
```

Matrix report example

Back Print

	Development	Sales	Support
Drew Lederman	7		
Mahesh Salaria	4		
Jamie Edwards	1	1	
Ryan Lederman	7		
Sandeep Verma			1
Vinay Sharma			2

Screenshot 73: Group by matrix report

We can create a nested matrix report by adding more **X()*s** and **Y()s** to the ***GROUP BY**. So, taking the same example above, we can further break the ticket counts down by priority:

```
SELECT COUNT(*) FROM 'Tickets' WHERE 'Tickets.Status'= 'Open' GROUP BY X('Tickets.Department'), X('Tickets.Priority'), Y('Tickets.Owner')
```

To produce:

Matrix report example

Back Print

	Development			Sales	Support		
	High	Low	Medium	Low	High	Low	Medium
Karan Bhagat						1	1
Mahesh Salaria	2	1	1				
Rajan Masih				1			
Ryan Lederman	1	2					

Screenshot 74: Matrix report example

MULTIGROUP BY

The **MULTIGROUP BY** operator is used to produce a list of tables within one report. For example, to the following KQL statement produces a list of user organization's phone numbers, **MULTIGROUPed BY** country:

```
SELECT 'User Organizations.Name', 'User Organizations.Phone', 'User Organizations.Country' FROM 'User Organizations' MULTIGROUP BY 'User Organizations.Country'
```

Multigroup report example

Back Print

Uganda

Name	Phone
Sunflower Technologies Ltd	+256791234569

Ukraine

Name	Phone
Host Consult	+300(34)0092267
AIC Ltd.	
Markate1 Ltd.	+300(67)1239549

Screenshot 75: Multigroup report example

A **MULTIGROUP BY** cannot be used with the **GROUP BY** operator.

Specifically, the **MULTIGROUP BY** operator is used to produce grouped tabular reports. For more information, see [Report Types](#).

Selectors

For various value types, we have implemented a feature called Selectors. Selectors are best demonstrated by an example:

```
SELECT AVG('Chats.Wait Time') FROM 'Chats' WHERE 'Chats.Type'='User' AND 'Chats.Creation Date'= ThisMonth()  
GROUP BY X('Chats.Creation Date':MonthName), Y('Chats.Creation Date':DayName)
```

`Chats.Creation Date` is a value that represents a date.

You can attach various Selectors to this using a colon, following by the selector such as `DayName` and `MonthName`. In this case, these Selectors allow you to select parts of a date or render dates in different ways in your reports, without any complicated syntax.

For a list of Selectors, see the [KQL Condition and Operator Reference](#).

Variables

Any expression from the `SELECT` clause, for which an alias was defined using the `AS` operator can be referenced from any other clause (except `FROM`) using the syntax `$(Alias Name)`.

Date and time in reports

There are two types of date and time representations used in the helpdesk:

Unix time - Rather than storing dates and times as long text, like '2011-12-01 13:10:22', unixtime is the number of seconds since January 1, 1970. This is how GFI HelpDesk stores date and time values in the helpdesk. It's handy for computers, but not so great for reading.

Timestamp - This is a more readable way of representing date and time, and looks like the following: '2011-12-01 13:10:22'.

When a date and time value is selected in a report, all of the calculation is done when the time value is unixtime. When your report is run and the results are displayed, the unixtime is converted to a timestamp.

2.4.5 Advanced reporting using KQL

This sections has information about the advanced reporting using KQL.

Optimizing KQL reports

Optimization is challenging, no matter what you are doing, and unfortunately, reporting in GFI HelpDesk is no exception. How to make the process of writing, rendering, and processing reports most effective?

Today, these questions concern a majority of the users working with reports in GFI HelpDesk.

Optimizing KQL (Kayako Query Language) reports is a set of actions aimed at improving the speed of report rendering and reducing memory usage. To optimize your report performance, you need to know the right tools, and how to focus on the target result set which you want to see.

Understanding how reports work?

With the KQL reports, it is essential to know that it fetches data directly from the database; thus, it uses MySQL and server resources to fetch any results. So, the only way to make a query run faster is to reduce the number of calculations that the software (and, therefore, resources) must perform.

The optimization here lies in two directions: increasing the speed of report rendering and reducing memory usage.

Optimizing KQL reports

To increase the speed of rendering reports, it is necessary to request only needed data from large databases. That is, if for the report, you need results only from a given time range, then there is no need to fetch all the data available in the database. Otherwise, a huge amount of resources is spent on it to get all the data, not to mention the time spent. So, you need some understanding of how MySQL makes calculations.

The following section describes the basic statements that must be checked before moving on to query plans:

SELECT *

Using the **SELECT *** statement is only recommended when you want to use all of the data returned by this statement. For example, if you are using a KQL query like:

```
SELECT * FROM 'Tickets'
```

This not only fetches all the fields from the Tickets table but also put additional load on the MySQL server and add to the time required to complete this query. Instead, you should only call the required fields, as shown in the following example.

```
SELECT 'Tickets.Ticket ID', 'Tickets.Subject', 'Tickets.Department' FROM 'Tickets'
```

WHERE

It is always logical to use a **WHERE** construction in KQL. In case you do not need all the fields and records from a table,

etc., but only the ones corresponding to specific conditions. This applies a positive effect on performance. So, it is always suggested to add your conditions under the WHERE clause of the report like this:

```
SELECT 'Tickets.Ticket ID' FROM 'Tickets' WHERE 'Tickets.Department' = 'General'
```

In this sample query, you are telling GFI HelpDesk to fetch results only from a specific department. Thus, the system only looks at the results under that department instead of the entire database.

To find more useful conditions and operators, see [KQL Condition & Operator Reference](#).

MKTIME

When filtering the report's data and minimizing the data set that needs to be queried, the time ranges play an important role. For example, if you are running reports for data older than a month, you can use the MKTIME function to limit the scope of your report. The following report helps you limit the time range for your report and reduce its load time:

```
SELECT 'Tickets.Ticket ID' FROM 'Tickets' WHERE 'Tickets.Department' = 'General' AND 'Tickets.Creation Date' <= MKTIME('0','0','0','20','9','2017') AND 'Tickets.Creation Date' <= MKTIME('0','0','0','3','31','2017')
```

This function becomes highly useful when you are running reports for large data sets. For example, you want to query all the data since 2010; you can use the MKTIME function to break into 6 reports and reduce the time taken to run this report. The MKTIME function accepts a date in the following syntax:

```
MKTIME('hour','minute','second','month','day','year','is_dst');
```

NOTE:

The parameters of the MKTIME () function should be added in single quotes in GFI HelpDesk 4.93.01 and above. For further information, refer to [MKTIME](#).

LIMIT

Again, this is one more useful function to set limits to the scope of your report and avoid processing too many records.

For example, you are fetching results from a very high-volume system where thousands of records are created every day. And even after using all the conditions and filters, the report is taking too long to run; you can use the LIMIT function to break the results into parts, as shown in the example below.

```
SELECT 'Tickets.Ticket ID' FROM 'Tickets' WHERE 'Tickets.Department' = 'General' AND 'Tickets.Creation Date' = Today()  
LIMIT 100 OFFSET 0
```

This report gives you only the first 100 rows from the total results. To continue fetching the remaining records, you can increment the offset like this:

```
SELECT 'Tickets.Ticket ID' FROM 'Tickets' WHERE 'Tickets.Department' = 'General' AND 'Tickets.Creation Date' = Today()  
LIMIT 100 OFFSET 100
```

KQL matrix reports are broken after an upgrade

If you upgraded your GFI HelpDesk to version 4.93.01 and try to run a matrix report, you may notice issues such as:

- » Report not generating an output or no data is showing
- » Report is producing blank pages
- » Report does not run on schedule
- » Report is showing as HTML content instead of an Excell format

This issue is a known bug in GFI HelpDesk 4.93.01. This topic provides information on how to fix this issue.

If you are using GFI HelpDesk 4.93.01, then you are likely to encounter this issue since it is a known bug on this version which was fixed in GFI HelpDesk 4.93.02 and higher versions. So to resolve this issue, you need to upgrade your helpdesk to the latest version available.

To upgrade to the latest version of GFI HelpDesk, visit the [Upgrading or Downgrading Your GFI HelpDesk](#).

KQL condition & operator reference

GFI HelpDesk reports gives you the power to define the various types of functions and operators in your KQL statement to get the required information from your helpdesk data.

Almost all of the MySQL functions and operators can be used along with your own custom fields in GFI HelpDesk.

In this topic, we'll walk you through the different categories of KQL functions and operators along with sample KQL statements.

The KQL functions are categorized in the different categories based on their usage in the report.

Conditions and Operators

Operator	KQL Example	Results
=	SELECT 'Chats.Chat ID' FROM Chats WHERE 'Chat.Department'='Technical Support'	Report to include all past chats that belongs to the Technical Support department.
!=	SELECT 'Tickets.Ticket ID' FROM Tickets WHERE 'Tickets.Department'!='Sales'	Report to include all tickets that DO NOT belong to the Sales department.
IN	SELECT 'Tickets.Ticket ID' FROM Tickets WHERE 'Tickets.Department' IN ('Sales', 'Support', 'Billing')	Report to include all tickets that are in one of the following departments: Sales or Support orBilling.
NOT IN	SELECT 'Tickets.Ticket ID' FROM Tickets WHERE 'Tickets.Status' NOT IN ('Closed', 'In Progress')	Report to include tickets that are not set to the statuses Closed or In Progress .
LIKE	SELECT 'Users.Fullname', 'Users.User Organization' FROM 'User Emails', 'Users' WHERE 'User Emails.Email' LIKE '%GFI HelpDesk.com'	Report to include all users whose email address matches '%gfi.-com', where '%' means anything value.
NOT LIKE	SELECT 'Users.Fullname', 'Users.User Organization' FROM 'User Emails', 'Users' WHERE 'User Emails.Email' NOT LIKE '%GFI HelpDesk.com'	As above, but includes users where the email address does not match '%hotmail.com'.

Operator	KQL Example	Results
AND	SELECT 'Tickets.Ticket ID'FROM Tickets WHERE 'Tickets.Department'='Sales'AND 'Tickets.Status'='Open'	Report to include tickets that are in the Sales department and a reset to the status Open .
OR	SELECT 'Tickets.Ticket ID'FROM Tickets WHERE 'Tickets.Department'='Sales' OR 'Tickets.Department'='Support'	As above, but includes tickets that are in the Sales department or the Support department.

Numerical operators

Operator	Description	KQL Example	Results
<, >, <=, >=	Less than, Greater than, etc	SELECT 'Tickets.Ticket ID', 'Tickets.Subject' FROM Tickets WHERE 'Tickets.Reply Count'> 5 AND 'Tickets.Creation Date'= LastMonth()	Includes all tickets that have more than 5 replies and were created in the last month.
+, -, *, /	Add, subtract, multiply, divide	N/A	N/A

Functions

Function	Description	KQL Example	Results
COUNT()	Counts the number of matching results	SELECT COUNT('Tickets.Ticket ID') FROM Tickets WHERE 'Tickets.Creation Date'= Yesterday() GROUP BY 'Tickets.Department'	Produces a count all of the tickets that were created yesterday, grouped by department.
IF()	Checks if a condition is true and produces a result	N/A	N/A

Custom fields

Function	Description	KQL Example	Results
CUSTOMFIELD()	Returns the value of matching custom field	SELECT 'Tickets.Ticket Mask ID', CUSTOMFIELD(*) FROM 'Tickets'WHERE CUSTOMFIELD('Last check date') = LastMonth()	Produces a list of all ticket custom fields for tickets the value of the 'Last check date' custom field of which is in last month.

The CUSTOMFIELD () function accepts three arguments:

- » **Source** (uses report primary source if omitted)
- » **Custom field group title** (looks in all available groups for this source if omitted)
- » **Custom field title** (for example, 'Last check date'), custom field name (for example, '6nvjvi53lbh2') or * (all custom fields).

It is recommended to configure GFI HelpDesk and MySQL to use the same time zone for date conversion accuracy for custom fields of the **Date** type.

Math functions

Function	Description	KQL Example	Results
SUM()	Calculates the sum of matching results	SELECT SUM('Ticket Billing.Time Spent') FROM 'Ticket Billing' WHERE 'Ticket Billing.Creation Date'>= ThisWeek() GROUP BY X('Ticket Billing.Creation Date':DayName), Y('Ticket Billing.Worker')	Produces a matrix of the total billable time logged for this week, displayed by staff user and by day.
AVG()	Calculates the average of matching results	SELECT AVG('Rating Results.Score') FROM 'Rating Results', 'Tickets' WHERE 'Ratings.Type'='Tickets'AND'Tickets.Creation Date'='ThisMonth() GROUP BY X('Ratings.Title'), Y('Tickets.Owner')	Produces a matrix of the average ticket ratings for the month, displayed per ticket owner.
MAX()	Returns the maximum value from matching results	SELECT MAX('Rating Results.Score') FROM 'Rating Results', 'Tickets' WHERE 'Tickets.Creation Date'=' ThisWeek() GROUP BY'Tickets.Owner', 'Ratings.Title'	Produces a list of staff users and their corresponding best (max) rated ticket for the week.
MIN()	Returns the minimum value from matching results	SELECT MIN('Rating Results.Score') FROM 'Rating Results', 'Tickets' WHERE 'Tickets.Creation Date'=' ThisWeek() GROUP BY'Tickets.Owner', 'Ratings.Title'	As above, but displays the worst (min) rated ticket for the week.

NOTE:

MySQL's math functions are also supported.

Date and Time Functions

Function	Description
MKTIME()	Converts atimestampinto aunixtime.NOTE: UsesPHP's mktime() syntax.
FROM_UNIXTIME()	Converts aunixtimeinto a human readabletimestamp.
DATENOW()	Returns the currentunixtime.
LAST_DAY()	Takes atimestampreturns the corresponding value for the last day of that month (for example, 31 for October).
DATEDIFF()	Calculates the difference in days between twotimestamps.
MONTHRANGE()	Calculates the dates in between of a range.

NOTE:

MySQL's date and time functions are also supported.

Date and Time Shortcuts

Shortcut	KQL Example
Yesterday()	SELECT Count('Tickets.Ticket ID') FROM Tickets WHERE 'Tickets.Creation Date'= Yesterday()
Today()	... WHERE 'Tickets.Creation Date'= Today()
Tomorrow()	... WHERE 'Tickets.Due Date'= Tomorrow()
Last7Days()	... WHERE 'Tickets.Creation Date'= Last7Days()
LastWeek()	... WHERE 'Tickets.Creation Date'= LastWeek()
ThisWeek()	... WHERE 'Tickets.Due Date'= ThisWeek()
NextWeek()	... WHERE 'Tickets.Due Date'= NextWeek()
LastMonth()	... WHERE 'Tickets.Creation Date'= LastMonth()
ThisMonth()	... WHERE 'Tickets.Resolution Due Date'= ThisMonth()
NextMonth()	... WHERE 'Tickets.Resolution Due Date'= NextMonth()
EndOfWeek()	... WHERE 'Tickets.Due Date'= EndOfWeek()

Date and time selectors

For various value types, we have implemented Selectors in KQL. Selectors are best demonstrated by an example below:

```
SELECT AVG('Chats.Wait Time') FROM 'Chats' WHERE 'Chats.Type' = 'User' AND 'Chats.Creation Date' = ThisMonth()
GROUP BY X('Chats.Creation Date':MonthName), Y('Chats.Creation Date':DayName)
```

`Chats.Creation Date` is a value that represents a date. You can specify various selectors to this using a colon, following by the selector such as **DayName** and **MonthName**. In this case, these selectors allow you to select parts of a date or render dates in different ways in your report, without any complicated syntax.

Selector	Description	KQL Example
:Day	The day number	SELECT 'Tickets.Ticket ID' FROM Tickets WHERE 'Tickets.Resolution Due Date'= Today() GROUP BY'Tickets.Creation Date':Day
:DayName	The day name (ie Thursday)	... GROUP BY 'Tickets.Creation Date':DayName
:Minute	The minute value	... GROUP BY 'Tickets.Creation Date':Minute
:Hour	The hour value	... GROUP BY 'Tickets.Creation Date':Hour
:Week	The week number (out of 52)	... GROUP BY 'Tickets.Creation Date':Week
:WeekDay	The weekday index, starting from 0 (Monday)	... GROUP BY 'Tickets.Creation Date':WeekDay
:Month	The month number (out of 12)	... GROUP BY 'Tickets.Creation Date':Month

Selector	Description	KQL Example
:MonthName	The month name (ie December)	... GROUP BY 'Tickets.Creation Date':MonthName
:Quarter	The quarter number (out of 4)	... GROUP BY 'Tickets.Creation Date':Quarter
:Year	The year number	... GROUP BY 'Tickets.Creation Date':Year

KQL query to pull tickets created by staff with 'As a user' or 'Send an email' option

When creating a new ticket, the agent has the option of creating it 'As a user' or 'Send an email.' You may wonder if a report can be generated to show this data.

NEW TICKET

General

Next Help

Create ticket type

Send an email A ticket will be created and you will be the author - like sending an email to someone.

As a user Create a ticket on a user's behalf, under their own name. Useful for logging phone calls.

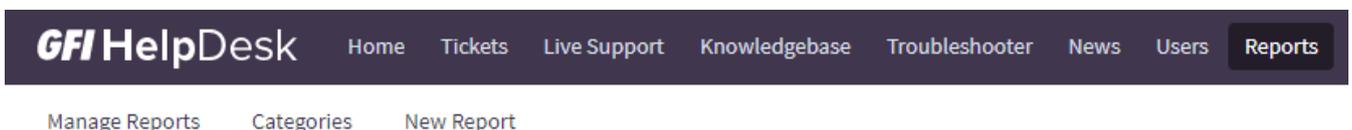
Create ticket in department General

Screenshot 76: New ticket window

A KQL query can be generated to pull tickets created by staff with 'As a user' or 'Send an email' option. This article provides the steps on how to generate this report using a custom KQL query.

To generate the report:

1. Log in to your GFI HelpDesk Staff Control Panel, that is, <https://yourdomain.gfihelpdesk.com/staff>.
2. On the Staff Control Panel, go to Reports, and then click **New Report**.



Screenshot 77: New report navigation

3. On the **New Report** form, type in the desired Title.
4. On the Primary Source, select Tickets from the drop-down list.
5. Select a **Category** of your choice.

NEW REPORT

Properties

Title: Tickets Created By Staff

Primary source: Tickets

Category: Let there be light

Public

Next »

Screenshot 78: New report window

6. Click **Next**, and enter the following KQL query.

```
SELECT 'Tickets.Ticket ID',
IF('Tickets.Creator' = 'User', 'As a User', 'Send an email') AS METHOD
FROM 'Tickets'
WHERE 'Tickets.Creation Mode' = 'Staff Control Panel'
```

Tickets Created By Staff

Run Report

Chr: 168

```
SELECT 'Tickets.Ticket ID', IF('Tickets.Creator' = 'User', 'As a User', 'Send an email') AS Method FROM 'Tickets' WHERE
'Tickets.Creation Mode' = 'Staff Control Panel' |
```

Screenshot 79: Enter the KQL query

7. Click the **Run Report** button.

The report should look like the one shown below. You may print, export, or schedule when to run this report as desired.

Tickets Created By Staff	
Ticket ID	Method
3	Send an email
4	Send an email
8	As a User
1317	As a User
1318	Send an email
1319	Send an email

Screenshot 80: Report of tickets created by staff

3 Glossary

A

Active directory

A directory service for Windows domain networks.

G

Greylisting

Greylisting is an antispam method that temporarily rejects messages from unknown senders.

H

HTTP

Hypertext Transfer Protocol - A protocol for exchange of hypertext documents in HTML.

HTTPS

Secure version of secured by SSL.

I

IM

Instant Messaging - A real-time online chat.

IMAP

Internet Message Access Protocol - One of the two most commonly used Internet standard protocols for e-mail retrieval, the other being POP3.

Instant Messaging

Instant messaging is a real-time online chat.

Internet Service Provider

An organization that can provide Internet service.

IP address

An identifier assigned to devices connected to a TCP/IP network.

ISP

Internet Service Provider - an organization that can provide Internet service.

K

Kerberos

An authentication protocol for client/server applications.

M

MX record

Mail Exchanger record is a record in DNS that specifies which server handles email messages.

N

NNTP

Network News Transfer Protocol - A transfer protocol for discussion groups over the Internet.

NTLM

NT LAN Manager - Security protocols that provide authentication for Windows networks.

O

Open directory

A directory service for Apple based networks.

P

PCI DSS

Payment Card Industry Data Security Standard - A set of security standards for organizations to securely process and store data of credit cards.

POP3

Post Office Protocol 3 - A protocol used by local email clients to retrieve emails from mailboxes over a TCP/IP connection.

Public folder

A common folder that allows users to share information.

R

regular expression

Enables to define a sequence of characters that specify a search pattern.

root certificate

A certificate issued by a trusted certificate authority (CA). In the SSL, anyone can generate a signing key and sign a new certificate.

S

S/MIME

Secure/Multipurpose Internet Mail Extensions - Email protocol based on SMTP used to digitally sign and encrypt messages.

SMTP

Simple Mail Transport Protocol - An internet standard used for email transmission across IP networks.

SNMP

Simple Network Management Protocol - A protocol for gathering and organizing information about devices in IP networks, and changing devices behavior.

SPF

Sender Policy Framework is an open source equivalent to Caller ID.

SRV record

Service record is a record in DNS that specifies the location of server for individual services.

SSH

Secure Socket Shell - A network protocol that provides administrators with a secure way to access a remote machines.

SSL

Secure Sockets Layer - A protocol that ensures integral and secure communication between networks.

SSL certificate

SSL certificates are used to authenticate an identity on a server.

T**TCP**

Transmission Control Protocol - ensures packet transmission.

TLS

Transport Layer Security - A follower of the SSL protocol and ensures secure communication between networks.

U**UNC path**

A standard that specifies the location path of a network resource.

URL

Uniform Resource Locator is the address of a web page on the world wide web.

W**WebDAV**

Web Distributed Authoring and Versioning is a framework that enables users to work with documents on a server.

X

XMPP

Extensible Messaging and Presence Protocol is a protocol used for real-time communication (chat).