

# Desk Tracker Plus Desk Tracker Live

## *Request Management and Communication*



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**Systems**

This guide covers both Desk Tracker Plus and Desk Tracker Live. Both systems are identical with the exception of several real-time and scheduling features available only in Desk Tracker Live. These features will be marked as **[Desk Tracker Live ONLY]**.

# Getting Started

Desk Tracker Live includes systems for communicating with patrons and responding to requests. Getting started with Desk Tracker Live is easy with Compendium's customization service, included at no extra cost. Send requests to [support@compendiumlib.com](mailto:support@compendiumlib.com) or your Compendium contact.

## **Our library has an old web form we'd like to use with Desk Tracker Live:**

Just send us a link to your webform(s). We'll create a temporary copy on our server which works with your Desk Tracker Live account. Once you've had a chance to test the form, we'll help you update your live version.

## **We've never used web forms, but we would like to.**

We can set up web forms for you. Web forms are usually hosted on the library's server, but we can also host them for you.

Let us know what information the form(s) should collect and who should get the requests, and we'll do the rest.

## **We want to take patron requests by email / in person / through our Desk Tracker Live statistics forms.**

Desk Tracker Live can generate active requests with each of these methods. Let us know how you'd prefer to take electronic requests, and we'll set the system up accordingly.

*Note:* To make a library email account "talk" with Desk Tracker Live, you'll need a little IT help from whoever manages your email. We can work with your IT department for a smooth transition.

## **We need to set up staff accounts.**

Send us a list of names and emails, and we'll create your accounts. Specify what types of tickets each user should be able to view: all tickets, those assigned to their group or department, or only their own.

## **Thanks, but I'd like to set everything up myself.**

The following pages list steps for customizing and using Desk Tracker Live. As always, if you get stuck or have questions, just let us know.

## More About Tickets

The term "*ticket*" is used in Desk Tracker Live to describe an interaction between library staff and a patron. Tickets are initiated by either patrons or staff and include questions and reference requests submitted via library web forms and/or email. Each ticket includes a transcript, which accumulates a conversation between staff and the patron over the life of the ticket.

Desk Tracker Live provides a great deal of control over how tickets look and behave. In addition, it is possible to automatically assign incoming tickets to specific staff members, and to send email notifications to others when certain conditions are met.

Most Desk Tracker Live tickets begin when a patron submits a request or question through a library web form or by sending an email to a designated library address.

Tickets can also be created manually or while submitting data with a Desk Tracker Live statistics form.

**Remember, Compendium provides setup, customization, and support at no cost.**

### Web Forms

Desk Tracker Live can accept requests from any Internet web form, and several tools are available to help a library web administrator direct patron web requests into Desk Tracker Live. For details, see the section labeled *Integrating Desk Tracker Live with The Library Website*.

The new ticket will be linked to a patron record based on the email address provided in the web form. If no matching patron record exists, a new one will be created.

### Email

Desk Tracker Live uses automatically generated email messages for notifications and communication between staff members and patrons. In addition, the library can optionally accept new requests via email. If the *Accept Email Requests* system option is turned on (see *System Options*), all emails received by Desk Tracker Live, that are not replies related to existing tickets, will be entered as new tickets. Patrons who submit an email request will receive an automatic response with a customizable message.

A patron record will be linked with the new ticket based on the *from* address of the email message. If no matching patron record exists, a new record will be created.

Accepting new email requests allows patrons a convenient method of initiating contact with the library, but it also creates the potential for new tickets created by "spam" email to the library's system email address. The Accept Email Requests

system option is turned off by default, and can be activated by setting the system option Accept Email Requests to "yes."

Every Desk Tracker Live library has a *system email address* in the format [account\\_number@desktrackerlive.com](mailto:account_number@desktrackerlive.com). Messages sent to this address will behave as described above. However, most libraries will want a system email address on their library's domain, such as "[reference@yourlibrary.edu](mailto:reference@yourlibrary.edu)."

### **Using Library Email Addresses with Desk Tracker Live**

To accept Desk Tracker Live email requests using one or more local email addresses (for example, [reference@yourlibrary.edu](mailto:reference@yourlibrary.edu)), set the local email accounts to forward messages to the library's Desk Tracker Live system address (the email address assigned to the library, ending with "@desktrackerlive.com").

To specify a local email address to be used by default, as with responses to web form request, enter the address in the "Default Redirect Email" field on the System Options screen.

### **Statistics Forms**

Active requests can be generated from any Desk Tracker Live statistics form by checking the *Escalate to Active Request* checkbox. If this element is not already visible on your statistics form, it can be activated in the "view options" section of the management screen.

### **Manual Entry**

Staff members using Desk Tracker Live can manually create a new ticket with any relevant information, match the ticket to a new or existing patron, and/or assign the ticket to a staff member, as desired.

# Active Requests

Staff member accounts can be set up in Desk Tracker Live with a wide range of permissions and options. How Desk Tracker Live appears to a staff member depends on whether they are an administrator, have access to all system tickets or only those assigned to them, and is based on the specific menu options and security levels set for their account.

## Access

Access to Desk Tracker Live is through the *Staff URL* provided in the account documentation.

## Working with Tickets

### **Ticket Dashboard** (*Tickets* menu → *Dashboard*)

After signing in, staff members will see this screen with current open tickets in a sortable list.

Depending on the user account settings, the dashboard list may show all open tickets, or only those assigned to the staff member logged in (see *Managing People*).

Desk Tracker Live can mark as *overdue* tickets that have not been updated in a certain number of days (see *System Options*). Any overdue tickets will appear at the top of the dashboard list.

Clicking any column header will sort the list by that field in alternately ascending and descending order.

Clicking a ticket number will open the *Ticket Details* screen.

In the dashboard list, a checkbox appears next to each ticket. By checking tickets, and then choosing an action from the *With Selected* drop-down menu below the list, it is possible to delete or update the status of several tickets at a time.

### **Creating a Ticket** (*Tickets* menu → *New Ticket*)

Tickets can be manually created on this screen. Click the *Create New Ticket* link, enter a patron name and email (if available - the ticket will be matched based on email to a patron record, if one exists), enter the question, and click *Create*. Details of the new ticket can be edited by clicking on the ticket number in the *Ticket Dashboard*.

## Ticket Details

Most work in Desk Tracker Live takes place in the *Ticket Details* screen, where staff members can view request details and communicate with patrons, make comments and changes, and forward tickets to “outside experts”.

### Transcript

The transcript lists all communication related to the ticket, plus details on any changes or other significant actions.

The original post, whether it is a web form request, email, Desk Tracker event, or manual entry, will be listed at the top of the transcript. Subsequent communications, changes, or actions, will be listed below.

### Ticket Settings

The *Ticket Settings* section allows staff members to make the following changes:

|                      |  |
|----------------------|--|
| <b>Status</b>        | Change the current status of the ticket.   |
| <b>Assignee</b>      | Assign or reassign the ticket to a staff member. The assignee will receive by email new communications from the patrons and will see the open ticket on their <i>Ticket Dashboard</i> list.  |
| <b>Patron</b>        | <p>The patron matched to the ticket will receive notifications by email of all updates made by staff members (but not internal comments and other system changes), and will see the open ticket on the <i>Ticket Dashboard</i> list for their account.</p> <p>When a web form or email request is received, a patron is automatically matched to the ticket based on the email address provided.</p> <p>It is possible to change the patron matched to the ticket by selecting a new patron account.</p> |
| <b>Custom Fields</b> | In addition to the built-in fields listed above, the <i>Ticket Settings</i> section also includes any custom fields created by the library to track additional information. For details on custom fields, see <i>Customizing Ticket Structure</i> .  |

### Delete Ticket

A ticket can be completely removed from the Desk Tracker Live system by clicking the *Delete Ticket* link. This action is permanent, and in most cases, it is better to change the status of a ticket to “closed” rather than delete it.

### View Web Form Details

Clicking the *View Web Form Details* link opens, on a new screen, a complete list of data submitted for tickets of web form origin. It is also possible to expand web form details within the ticket transcript by clicking the *show web form details* link.

### **Respond/Comment/Forward Tool**

The *Ticket Details* screen includes a text editor with the following three tabs:

- Respond** Responses are the primary mode of communication between staff members and patrons. Responses are posted to the transcript and, if the ticket is matched to a patron, delivered to the patron's email address. When a staff member responds to a ticket, that ticket will be automatically assigned to them.
- Comment** Comments are internal postings which appear only in the staff ticket view. They are not emailed to patrons.
- Forward** Forwarding is designed to facilitate consultation with "outside experts" who do not have a Desk Tracker Live account. Email replies from the recipient will be captured in the ticket transcript.

### **Drafts**

Any text in the Respond/Comment/Forward box may be saved as a draft by clicking the *Save as Draft* button. Any saved drafts will be available in the *Editor Tools* area.

### **Editor Tools**

A set of tools will appear next to the Respond/Comment/Forward box when the link *show editor tools* is clicked.

- HTML Elements** By clicking on *Image* or *Link*, staff members can enhance their responses by inserting images or links to outside web pages.
- Boilerplate Text** Desk Tracker Live allows staff members to utilize saved boilerplates for text composition. All saved boilerplates available to the staff member are displayed in the boilerplate drop-down list. When a boilerplate is selected, it will be inserted into the editor box. To add and manage boilerplate text, see *Managing Boilerplates*.
- Uploaded Files** Staff members can upload files to the library's Desk Tracker Live system (see *Managing Files*) and provide links to those files in their responses. The following options are available for uploaded files:

- *Plain Link* – Inserts a download link to the file. The link will be the actual web address of the file.
- *HTML Link* – Inserts a plain-English link.
- *Image* – When the file is an image, this option inserts HTML to embed the image into the response.

**Drafts** Drafts created with the “Save as Draft” button can be inserted into the text box. When posting a response containing text from previous drafts, the staff member will have the option to save the draft for future use.

**Transcript** This tool inserts the ticket transcript into the editor box. Only staff and patron replies will be inserted, not system information or comments.

***Important Note:*** Patron names and email addresses are automatically stripped from the headers of inserted transcripts. However, it is important to screen the body of any message using ticket transcript text for personal or private information.

### **Navigating the Ticket Details Screen**

The *Ticket Details* screen includes two “anchor” links to speed the common task of skipping between the top of the screen and the editing section. The *[Post]* link at the top of the transcript positions the screen at the Respond/Comment/Forward box, while the *[Top]* link below the box positions the screen at the top.

### **Exception Tickets**

When Desk Tracker Live cannot process an incoming email due to a formatting problem or other error, it will create an *Exception Ticket*. Exception tickets are created with two transcript items: The failed incoming email message, and a basic explanation of the problem.

Exception tickets can be forwarded, modified, assigned, and otherwise treated like normal tickets, but allow three other actions:

#### ➤ **Delete**

The option of deleting exception tickets can be made available to users who do not have permission to delete standard tickets.

#### ➤ **Approve**

Approving an exception ticket removes the delete/approve/merge options and makes the ticket behave like any other. This is the best choice if the failed email is a standalone request that doesn’t relate to another ticket.

➤ **Merge**

This option merges transcript of the failed email with another ticket specified by the staff member. This is useful when the email is obviously a reply to an existing ticket.

## Searches and Reports

### Quick Search

A Quick Search box appears at the top of every screen in the staff view. The Quick Search is also available via the *Quick Search* item in the *Reports* menu.

To run a Quick Search, enter a search term in the box, then press Enter or click the hourglass icon (for the *Quick Search* box at the top of the screen), or use the *Search* button (for the *Quick Search* page). If the search matches any tickets, they will be displayed in a sortable list.

*Quick Search* displays all tickets where the search term matches one or more of the following areas:

- Ticket number
- Ticket status
- The original web form, email, or Desk Tracker transcript
- Assigned staff member (name, username, and email)
- Patron (name and email)
- All text-based or numeric custom ticket fields

Clicking the ticket number of any ticket displayed in the search results will open the *Ticket Details* screen. Clicking the *Return to Search Results* link on the *Ticket Details* will reload the Quick Search results.

### Report Builder (*Reports* menu → *Report Builder*)

Powerful searching and reporting is available with the *Report Builder*. The *Report Builder* allows searching on one or more custom conditions, and returns results in either a sortable list, export file, or bar graphs.

On the *Report Builder* click either *Create a New Report* or the name of an existing report. Details can be viewed and modified on the *Report Details* screen.

### **Report Detail**

The following basic options are available:

#### **Report Name**

**Owner** Owners have the ability to modify reports.

**Condition Type** Each report can display either those tickets that match "Any" of the conditions created, or "All" conditions.

**Shared** A shared report will be available system-wide. Reports that are not shared will only be available to report owners.

### **Report Conditions**

Report results are based on one or more conditions. A condition is created by choosing the *Type* of condition (for example, ticket status or origin), how the condition behaves (for example, "is" or "is not"), and a specific value. The following condition *Types* are possible:

**Status** Possible values are "new," "closed," "updated," or several other system status levels, or custom status levels set up for the library.

**Assigned To** The staff member assigned to the ticket

**Origin** Origin refers to how tickets were first created. Possible values are "web form," "email," "Desk Tracker," or "manual."

**Ticket Detail** This option allows matches against any other data point or "field" associated with the ticket. It is possible to search against the date a ticket was created or last updated, or any custom ticket fields.

**Ticket Text** A ticket text search matches the search term entered against the full transcript of each ticket, including the original web form or email request or the original Desk Tracker transcript.

**From** For direct email requests. The email address of the sender.  
**To** For direct email requests. The destination email address. This could be your system email address (@desktrackerlive.com) or a local email account set to forward messages to your system email address.

**Subject** For direct email requests. The email subject line.

### **Report Mode**

The following modes are available:

**Display List** Results are returned as a sortable list.

**Export** Results are downloaded to the staff member's computer as a comma-delimited file compatible with most spreadsheet and data applications.

**Graphs** Visual graphs provide basic information on the search set returned.

For both the *Display List* and *Export* modes, it is possible to select from a list which ticket fields will be returned.

Once a report is set up, clicking *Run Report* will return the search results as specified under *Report Mode*.

## Managing People

**My Profile** (*My Account* menu → *My Profile*)

Any staff member signed in to Desk Tracker Live can change their own account details using the *My Profile* screen. Name, email, and password can be modified.

**Staff Dashboard** (*Manage* menu → *Staff*)

Staff member accounts can be added, removed, or modified through the *Staff Dashboard* screen.

### **Staff Accounts**

A sortable list of staff member accounts is listed in this section. Clicking the last name for any account loads the *Staff Detail* screen for that staff member.

### **Deleting a Staff Account**

A staff account can be deleted by clicking the red "X" delete icon next to the account in *the Staff Accounts* list.

When a staff account is deleted, all Desk Tracker Live responsibilities and assignments **must be transferred to another staff account**. After the delete icon next to a staff account is clicked, another staff account must be selected for this transfer.

Notifications, assignments and ownership of tickets, boilerplate text, and reports will be transferred to the selected staff account. Menu permissions and security rules will not be transferred. Files uploaded by the deleted person will no longer be associated with any particular staff member.

## **Create New Staff Account**

A new staff member account can be created by clicking the *Create New User* link to display a form, filling out all fields, and clicking *Create...*

## **Patron Dashboard** (*Manage menu → Patrons*)

Patron accounts can be added and removed through the *Patron Dashboard* screen.

### **Patron Accounts**

A sortable list of patron accounts is listed in this section. Clicking the email link for any account loads the *Patron Detail* screen.

### **Deleting a Patron Account**

A patron account can be deleted by clicking the red "X" delete icon next to the account in the *Patron Accounts* list. Any tickets matched to the deleted patron will no longer match to any patron.

### **Manually Creating New Patron Accounts**

Patron accounts are created automatically when patrons submit web form or email requests. However, a new patron member account can be created manually by clicking the *Create New Patron* link to display a form, filling out all fields, and clicking *Create...*

## **Customizing the Active Request System**

### **System Options** (*Manage menu → System Options*)

Most of the behavior of Desk Tracker Live is customizable, from the format of system emails and web form messages, to the way in which tickets are displayed. Many of these customization options are accessed through the *System Options* menu. The following settings are available in *System Options*:

- **Overdue Days**  
After this many days of inactivity, open tickets will be marked overdue.
- **Accept Email Requests**  
If set to *Yes*, email messages sent to the system email address, which are not replies to existing tickets, will cause a new ticket to be created. If set to *No* all emails not related to existing tickets will be returned to the sender with the message specified with the *Default Email Bounce* Message option. Accepting email requests give patrons an easy contact method, but makes the account vulnerable to spam.

See *How Tickets Are Created* for more information on accepting email requests.

- **Default Email Bounce Message**

If *Accept Email Requests* is set to *No*, email messages that are not replies to existing tickets will be returned to the sender with the *Default Email Bounce* message.

- **Default Web Form Email Subject**

The default subject for the email to patrons sent in response to web form requests.

It is possible to override this subject for a particular web form by including a specific subject as a hidden form input with the name and id "form\_custom\_email\_subject".

- **Default Web Form Response**

The default message included with sign-in information in the email sent to patrons in response to web form requests. This message is optional.

It is possible to override this default message for a particular web form by including a specific message as a hidden form input with the name and id "form\_custom\_message".

- **Default Web Form Screen Confirmation**

The default message displayed in the browser when a web form is submitted (if the web form is not redirected – see *Default Web Form Redirect*).

It is possible to override this confirmation message for a particular web form by including a specific confirmation message as a hidden form input with the name and id "form\_custom\_screen\_confirmation".

- **Default Web Form Redirect**

The default web page to load after a web form request is submitted.

It is possible to override the redirect location for a particular web form by including a URL in a hidden form input with the name and id "form\_custom\_webform\_redirect".

- **Patron Update Notification Email Subject**

The email subject line for patron responses sent to staff members.

- **Staff Update Notification Email Subject**

The email subject for staff responses sent to patrons.

- **Days to Display Closed Patron Tickets**

The number of days that closed tickets will be displayed in the patron view.

- **Reply to Initial Email Request – Subject**  
Email subject for the message sent in response to initial email contact.
- **Default Redirect Email**  
The library email address used by default for Desk Tracker Live activity (for example, "[reference@yourlibrary.edu](mailto:reference@yourlibrary.edu)"). This email account must be manually set to forward emails to the library's assigned Desk Tracker Live system email address.

### **Customizing Ticket Structure** (*Manage menu → Ticket Template*)

Desk Tracker Live provides a high level of control over what data is stored in tickets. Many of the options for modifying ticket structure are available on the *Ticket Template* screen.

#### **System Status Options**

This section lists the built-in status levels that may be assigned to a ticket (for example, "new," "closed," and "updated").

#### **User Status Options**

In addition to the system status levels, staff members can designate additional status levels. Once created, these status levels can be assigned to tickets.

To add a custom status level, click *Create New Status*.

#### **Custom Fields**

Additional data fields can be designated for a library's ticket template. Custom fields appear in the *Ticket Settings* area of the *Ticket Detail* screen, are searchable through the *Report Builder*, and can be used to trigger automatic assignments and notifications (see *Automatic Assignments and Notifications*).

Clicking on a custom field will open the *Custom Ticket Field Editor*.

#### **Create New Custom Ticket Field**

To add a custom field, click the *Create New Custom Ticket Field* link. In the expanded form, enter a name for the new custom field, and select the type of field. The following field types are available:

- **Text Box (small)**  
Displayed as single-line text box. Appropriate for labels and short comments.
- **Text Box (large)**  
Displayed as a multiple-line text box. Appropriate for comments and other lengthy text.
- **Numeric**  
Displayed as a single-line text box. Numeric fields accept only whole, positive numbers.
- **Date**  
Displayed as a single-line text box with pop-up calendar tool.
- **Date & Time**  
Displayed as a single-line text box with pop-up calendar tool.
- **Dropdown**  
Displayed as a drop-down box. It is possible to specify an unlimited list of options for drop-down fields.

### **Custom Ticket Field Editor**

This section allows custom fields to be renamed and modified. It is also possible to change the field to another, similar type (for example, a small text box field can be changed to a large text box field).

For drop-down fields, the *Custom Ticket Field Editor* allows drop-down choices to be added and removed. Click *Custom Ticket Field Editor* to add a new option.

### **Managing Boilerplates** (*Manage menu → Boilerplates*)

The boilerplates available for insertion on the *Ticket Detail* screen can be administered on the *Boilerplate Dashboard* screen. A sortable list of boilerplates appears at the top of the screen. Clicking on the name of a boilerplate opens the *Boilerplate Detail* screen.

New boilerplates can be created by clicking on the *Create new Boilerplate* link.

Existing boilerplates in the list can be deleted by clicking on the red "X" delete link.

## Boilerplate Detail

Boilerplate details and availability can be modified on the *Boilerplate Detail* screen. The following fields are modifiable:

- **Description**
- **Available to All Users**  
If this field is set to "Yes," the boilerplate will be available on the *Ticket Detail* screen for all accounts. Otherwise, availability will be based on settings in the *Users* and *Productivity Groups* sections below.
- **Text**

### Users

Staff accounts appearing in this list will have access to the boilerplate on their *Ticket Detail* screen. If *Owner* is set to "yes," the account will also have permission to modify the boilerplate on the *Boilerplate Detail* screen.

### Productivity Groups

When a Productivity Group is included in this list, all members of that group will have access to the boilerplate on their *Ticket Detail* screen. If *Owner* is set to "yes," all members of the group will have permission to modify the boilerplate on the *Boilerplate Detail* screen.

See *Managing Groups* for more information on Productivity Groups.

## Managing Files (*Manage* menu → *Uploaded Files*)

Files available for linking on the *Ticket Details* screen can be managed with this set of administrative tools. On the main *Manage Files* screen is a sortable list of uploaded files. Clicking on a file name opens the *File Detail* screen.

To upload a new file, click the *Upload File* link, browse to a file on the local computer system, enter a description for the uploaded file, and click *Upload*.

File uploads to Desk Tracker Live are subject to a **1 Gigabyte size limit**.

To delete a file, click the red "X" delete icon.

## File Detail

On the *File Detail* screen, it is possible to rename the uploaded file, or preview the file by downloading it.

## **Automatic Assignments** ( *Manage* menu → *Assignment Rules* )

Desk Tracker Live has the capability to automatically assign newly created tickets to certain staff members based on a customizable set of rules.

Tickets are assigned at the time they are created in response to an incoming email or web form request, or a Desk Tracker event escalation.

The *Auto-Assignment Rule Dashboard* screen contains a sortable list of existing assignment rules. To delete an assignment rule, click the red "X" delete icon. Clicking on the name of an assignment rule opens the *Auto-Assign Rule Detail* screen.

To specify a new set of conditions for automatically assigning tickets, click the *Create New Auto-Assign Rule*, enter a name for the rule and the staff member to whom tickets will be assigned, and click *Create*. Specific conditions for the assignment rule are set on the *Auto-Assign Rule Detail* screen.

### **Auto-Assign Rule Detail**

On this screen auto-assign rules can be modified and conditions specified. Basic details that can be modified are:

- **Name**
- **Check Conditions**  
Determines if a ticket will be assigned if it meets "All" of the conditions listed in the rule, or "Any."
- **Priority**  
Used to resolve conflicts between auto-assign rules, where more than one assignment rule matches a given ticket. Tickets will be assigned to the staff member listed on the highest-priority assignment rule.
- **Assign To**

### **Conditions**

Tickets are matched to *Auto-Assign Rules* based on the specific conditions listed for that rule. Conditions can be set to match based on the origin of the ticket, or specific values in the ticket itself. For more on conditions, see the *Report Builder* section.

## **Automatic Notifications** ( *Manage* menu → *Notification Rules* )

Notifications rules are similar to assignment rules in that they match against tickets based on specific conditions. However rather than assigning a ticket to one staff member, the notification system sends an email to a list of staff members with ticket details.

The *Notification Rule Dashboard* screen contains a sortable list of existing notification rules. To delete a notification rule, click the red "X" delete icon. Clicking on the name of an notification rule opens the *Notification Rule Detail* screen.

To specify a new set of conditions for notifying staff members about tickets, click the *Create New Notification Rule*, enter a name for the rule, and click *Create*. Then, click on the new notification rule in the list, and complete the notification settings in the *Notification Rule Detail* screen.

### **Notification Rule Detail**

On this screen notification rules can be modified and conditions specified. Basic details that can be modified are:

- **Name**
- **Check Conditions**  
Determines if a ticket will be assigned if it meets "All" of the conditions listed in the rule, or "Any."
- **Notification Message**  
Optional text which will be included in the email notification to staff members when this notification rule is used.

### **Conditions**

Tickets are matched to *Notification Rules* based on the specific conditions listed for that rule. Conditions can be set to match based on the origin of the ticket, or specific values in the ticket itself.

For more on conditions, see the *Report Builder* section.

### **People to Notify**

Staff members in this list will receive an email notification when a ticket matches the specified notification rule.

## **Groups to Notify**

All members of the Productivity Groups in this list will receive an email notification when a ticket matches the notification rule.

## **Managing Groups** ( *Manage* menu → *Groups* )

Two types of groups can be maintained in Desk Tracker Live:

### **Productivity Groups**

Productivity groups are used for group notifications (see *Automatic Notifications*) and boilerplate text sharing (see *Managing Boilerplates*).

### **Security Groups**

Security groups are used to control Desk Tracker Live access in combination with custom security rules (see *Security*).

A list of groups appears under both headings. To delete a group, click the red "X" icon. Clicking on the name of a group opens the *Group Detail* screen.

To add a group, click on either the *Create New Productivity Group* or the *Create New Security Group* link, enter a name for the group, and click *Create*. Add members to the group by clicking on new group to load the *Group Detail* screen.

## **Group Detail**

This screen allows both Productivity and Security Groups to be renamed, and their membership managed.

### **Member List**

This section of the *Group Detail* screen contains a list of all current members of the selected group. To remove a staff member from the group, click the red "X" icon next to their membership record.

To add a staff member to the group, click the *Add New Group Membership* link, select the staff member, and click *Create*.

## **Custom Security Dashboard** ( *Manage* menu → *Custom Security* )

Custom security rules in Desk Tracker Live allow almost any area of the system to be restricted to certain users. In combination with the ability to control the availability of menu items for each staff member in the *Staff Detail* screen, custom security provides a high degree of control over staff member permissions.

There are three basic types of custom security rules: *System Area*, *Table Update*, and *File*.

### **System Area**

System Areas are predefined sets of screens and/or functions which can be secured as a group. Creating a security rule for a System Area restricts the screens and/or functions to only staff members with explicit permission to access them. The following is a list of System Areas that can be secured:

- **Delete Tickets**  
The ability to delete normal tickets by clicking the *Delete Ticket* link on the *Ticket Detail* screen. This area **does not include** the ability to delete exception tickets (see *Exception Tickets*), which must be secured separately.
- **User Administration**  
Access to the *Staff Dashboard* and *Staff Detail* screens.
- **Patron Administration**  
Access to the *Patron Dashboard* and *Patron Detail* screens.
- **Reports**  
Access to the *Report Builder* screen and *Quick Reports*.
- **Security Administration**  
Access to the *Custom Security Dashboard*

### **Table Update**

Table Update security rules protect specific types of data records from changes by all staff members except those with explicit permission. The following list of possible *Table Update* rules describes the effect of each on staff members who do not have the necessary permissions.

- **ticket**  
Makes the *Ticket Settings* section of the *Ticket Detail* screen non-editable.
- **ticket\_response**  
Prevents the editing of transcript records for a ticket. Does not prevent the posting of new transcript items.
- **user**  
Makes the *Staff Detail* screen non-editable. Does not prevent or change access to the *My Profile* screen.
- **patron**  
Makes the *Patron Detail* screen non-editable. Does not prevent or change access to the *My Profile* screen.

## **File**

File security rules allow any screen in Desk Tracker Live to be secured.

All URLs (the web address, listed in the Internet browser's address box) in the staff view of Desk Tracker Live have a format like the following example from the *System Options* screen:

[http://live.desktracker.com/index.php?act=inc\\_adm\\_system\\_options.php](http://live.desktracker.com/index.php?act=inc_adm_system_options.php)

Note that after "act=" is the name of a file ending in ".php". In the case of the above example, the file name is "inc\_adm\_system\_options.php". By creating a File security rule with this file name, access to the screen (in this case, *System Options*) can be restricted.

## **Creating a New Custom Security Rule**

To create a new rule, click the *Create New Security Rule* link on the *Custom Security Dashboard* screen, enter a name for the new security rule, select a *System Area* **or** select a *Table Update* type **or** enter the name of a .php file. When the form is completed, click *Create*.

Once the security rule is created, an access list for the rule must be created on the *Security Rule Detail* screen. Otherwise, all staff members will be locked out of the secured screen or functions.

Clicking on the name of a security rule will open the *Security Rule Detail* screen.

## **Security Rule Detail**

On this screen a security rule can be renamed, modified, and its access managed.

### **Access List**

The *Access List* shows all staff members and groups who have access to the screens and/or functions restricted by the security rule.

To add access to the security rule, click the *Create New Access* link, select a staff member or security group and click *Create*. For details on security groups, see *Managing Groups*.

## **Generating Webform HTML ( *Manage* menu → *Generate HTML* )**

Desk Tracker Live processes requests submitted from any web form (see *How Tickets Are Created*). However, web forms must contain certain required elements and the *Web Form HTML Generator* tool assists in creating complaint forms.

HTML code is generated by clicking on elements in the *Form Elements* section in the order in which they should appear in the code, then copying the code from the *HTML code* section.

The following elements are available:

### **Basic Elements**

This section includes the following basic HTML tags required for web forms.

- **Form Opening Tag**
- **Form Closing Tag**
- **Submit Button**
- **Line Break**

### **Ticket Fields**

This section allows form inputs to be inserted which match any custom fields created for the library's ticket structure. All custom fields are listed, and clicking on a field name inserts an HTML "<input>" tag in the *HTML code* box.

### **Hidden Form Inputs**

This section allows the following hidden input fields to be inserted, which affect the way Desk Tracker Live processes incoming form requests:

- **Library Account Number**  
(Required) This field identifies the library account to Desk Tracker Live.
- **Set Main Field Input**  
(Optional) This field tells Desk Tracker Live which form input should be used as the first entry of the ticket transcript. In most cases it will be the main text box on the form, where patrons describe their request. If this input is not provided, Desk Tracker Live will expect a form input with the name and id "question".

## Email Broadcast Tools

Desk Tracker Live includes an email broadcast system which allows you to easily send surveys and other announcements. All features are found in the *Email* menu.

### Email Lists

On the email lists dashboard it is possible to either import a list of emails from a .csv text file, or create a new, empty list. Clicking on an existing list opens the email list detail screen.

### Email List Detail Screen

The list detail screen shows the name of the list, all email addresses in the list, and links for the following actions:

- **Add Email Address** – Manually add a new address
- **Export to Existing List** – Add the contents of the current list to another list.
- **Import From Existing List** – Add the contents of another list to the current list.
- **Refresh** – Reload the current list view
- **Import From File** – Import addresses from a .csv file
- **Export to File** – Export the current list to a .csv file
- **Purge Unsubscribed Emails** – Delete from the current list all addresses which have been unsubscribed. Unsubscribed emails will be excluded from any email message deliveries.
- **Purge Recently Bounced Emails** – Delete from the current list all addresses which bounced on the most recent attempt.

### Email Addresses

Use this menu item to add email addresses or update existing addresses.

### Email Messages

Create a new message on the “Email Messages” screen, or click an existing message to edit and send.

## **Email Message Detail Screen**

- **Name** – The name of the email message within Desk Tracker Live
- **List** – The list of email addresses which will be recipients of the message.
- **Subject** – The subject of the email message.
- **From** – The from email associated with the email message. This should be an email address associated with your Desk Tracker Live account.

- **Body** – The message body. Common options:



- Opens the editor in full screen mode.



- Insert a link to a Desk Tracker Live survey.



- Insert a dynamic field, such as name.

- **Send to Test Account** – This tool will send the message only to the account specified, and should be used to preview any message before sending to the list.
- **Send Email** – The “Send Email” button will begin the process of sending the message to the list of email addresses. A status bar will show the progress of the send. On completion, an item will be added to the “Send History” section with details.

# Integrating Desk Tracker Live with the Library Website

Desk Tracker Live integrates with the website of the subscribing library by processing requests submitted through any library web form.

## Integrating Desk Tracker Live with Library Web Forms

Building web forms or integrating existing web forms with Desk Tracker Live requires basic web page editing skills. However, only a few steps are required, and Desk Tracker Live provides tools to simplify the integration process.

The topics described in this section must be addressed in order to successfully integrate an outside web form. **Note: Many of the following steps can be performed automatically by Desk Tracker Live (see *Web Form HTML Generator*).**

### Setting the Web Form Target

In order to direct web form requests into the Desk Tracker Live system, the "action" parameter of the HTML <form> must be set to the *Web Form Target URL* provided in the account documentation.

### Standard Form Inputs

All form inputs on a web form submitted to Desk Tracker Live system will be captured and included in the transcript for the new ticket.

The form input specified by the *Main Field Input* hidden form input (see *Hidden Form Inputs*) will be used for the first transcript entry in the new ticket. If no input is specified, Desk Tracker Live will expect a form input with the name and id "question".

Any web form input with a name and id matching the name of a custom ticket field (see *Customizing Desk Tracker Live*) will have its value translated directly to the ticket field when the web form is submitted. For example, if a custom ticket field is created with the name "category" and a request is received through a web form with a form input named "category", the value of the form input will be translated directly to the newly created ticket.

## Hidden Form Inputs

The following hidden form inputs can be included in the body of the HTML form. Hidden form inputs marked "required" **must** be included on the web form for it to communicate correctly with Desk Tracker Live.

- **Library Account Number (Required)**

The body of the form must include a hidden HTML <input> tag with its id and name set to "library" and its value set to the *Library Account Number* provided in the account documentation.

- **Main Field Input (Optional)**

Input name and id: "form\_main\_input\_field"

The name of the form input that will be used as the first entry of the ticket transcript. In most cases it will be the main text box on the form, where patrons describe their request. If this input is not provided, Desk Tracker Live will expect a form input with the name and id "question".

- **Webform Email Subject (Optional)**

Input name and id: "form\_custom\_email\_subject"

The subject for email messages sent to patrons in response to web form requests. If this input is not included, Desk Tracker Live uses the subject specified in the system option "Default Webform Email Subject."

- **Webform Response (Optional)**

Input name and id: "form\_custom\_message"

Text included in the body of email messages sent to patrons in response to web form requests. If this input is not included, Desk Tracker Live uses the text specified in the system option "Default Webform Response."

- **Webform Screen Confirmation (Optional)**

Input name and id: "form\_custom\_screen\_confirmation"

Confirmation text displayed after the web form is submitted. If this input is not included, Desk Tracker Live uses the text specified in the system option "Default Screen Confirmation."

The Desk Tracker Live confirmation screen is only displayed if a web redirect URL is not specified in either a hidden input or system option (see Hidden Form Input: Webform Redirect).

- **Webform Redirect (Optional)**

Input name and id: "form\_custom\_webform\_redirect"

The default webpage to load after the web form is submitted. If this input is not included, Desk Tracker Live uses the URL specified in the system option "Default Webform Redirect."

## Captcha and Privacy Policy Screen

When a web form is submitted to Desk Tracker Live, the user submitting the form will be required to enter a series of characters from an image (known as "captcha") in order to complete the web form submission. This process prevents spam by verifying that the submitter of the form is a human being and not a "bot."

Also on this intermediary screen, is a link to the Desk Tracker Live privacy policy.

### **Bypassing the Captcha and Privacy Policy Screen for Applications**

Libraries with electronic systems that automatically submit form requests may need to bypass this captcha screen in order for their systems to function correctly. This can be accomplished by including the following HTML in the web form data:

```
<input type="hidden" name="bypass_confirmation" id="bypass_confirmation" value="true" />
```

If this hidden value is included in the form submit, a Desk Tracker Live ticket will be generated immediately, without the need to complete the captcha screen.

Since the captcha and privacy policy screen provides patrons with important information on privacy, ***this bypass process is recommended for electronic systems only and not for use with standard web forms.***

## Webform HTML Notes

Technical tips for creating web forms that work correctly with Desk Tracker Live.

### **1. Checkbox Sets**

In addition to standard form elements, it is possible to create one-or-many checkbox fields on web forms that submit to Desk Tracker Live. An example would be a field labeled *Request Type* with the options *Reference Request*, *Interlibrary Loan*, etc., where more than one option can be entered.

The standard approach to creating HTML code for this scenario is to create multiple *checkbox* inputs with the same name. In order for each selected option to be captured correctly by Desk Tracker Live, the *name* attribute must be followed by "[ ]" - for example:

```
<input name="qtype[]" value="ref" type="checkbox">Reference Request<br>
<input name="qtype[]" value="copies" type="checkbox">Photocopy Request<br>
<input name="qtype[]" value="scans" type="checkbox">Scan Request<br>
<input name="qtype[]" value="ILL" type="checkbox">Interlibrary Loan
```

## Questions and Support

For further assistance, customization, questions, and support, please contact us.

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