UniDesk Team Admins Overview

The manager of each UniDesk Operator Group, or their nominated delegate, will be a 'Team Admin', and can now carry out some simple administrative tasks for their team. There are two main areas of responsibility: email management, and group membership.

Note: To have the Team Admin updated for your Operator Group, contact IS.Helpline@ed.ac.uk

Email

Every team that uses email to create incidents has been provided with a functional account for incoming email. This account initially has a default setup which requires a bare minimum of maintenance. However, teams are able and welcome to manage mail within that account according to their own requirements.

Management

Mail coming into your Mailbox will, by default, be moved to the **udimport** folder, by the 'udimport' rule. All *unread* mail directed into this folder will be imported into UniDesk. An incident will be created for each new email imported from this folder, and it will be assigned to your team (Operator Group). After a successful import, the original email will be deleted from your functional account.

Junk Mail

You will be responsible for managing junk mail on the account. By default, messages are filtered into the Junk Email folder based on Spam Assassin headers. If necessary, you can alter the x-spam-level rule to change the level at which email is filtered.

You can handle junk mail at your own discretion, but be aware that legitimate messages will occasionally be categorised as junk. It is your decision how to manage this, and how often to check this folder. Please at least empty your Junk Mail folder often enough to keep your account below quota.

See right: *A typical mail folder list*

Account Details and Password

The password to your email account is also used by UniDesk, to collect mail from this account. If you change this password for your mail account then UniDesk will stop collecting mail and you will no longer receive new calls in the queue. Please contact the IS Helpline if a password change becomes necessary, or if you've forgotten your account details.
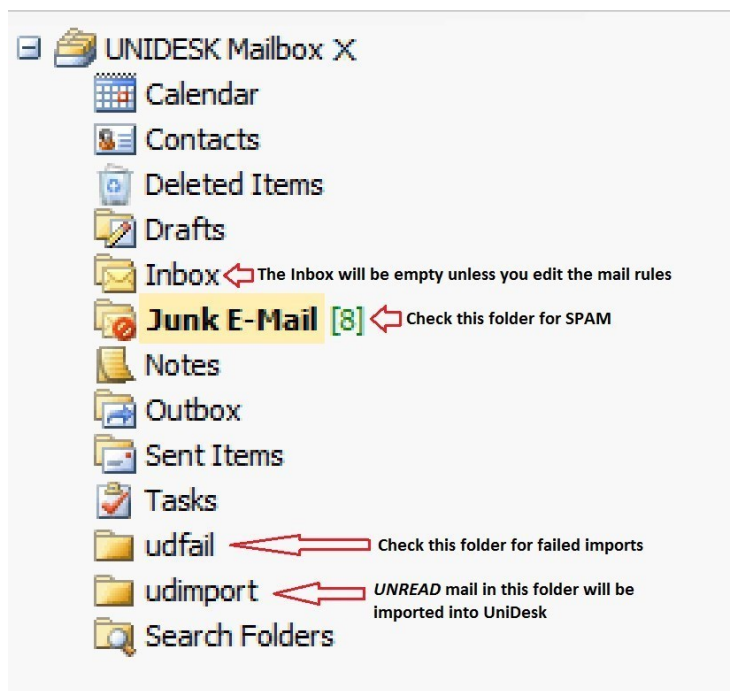
Failed Imports

It is very rare for mail to fail to import into UniDesk. It can occasionally happen in cases where attachments are not correctly inserted into mail. If an email fails to import, it will be moved to the 'udfail' folder. It is worth checking this folder periodically, but it is normal for it to be empty.

Quota

Please ensure that your mailbox remains under quota, by deleting messages which are no longer required, or which are junk. For most teams this will be a very occasional task.

Creating UniDesk Operators and Adding/Removing them from Operator Groups.

Apart from the username and login details, there are four main things you need to set up, when creating a new Operator in UniDesk.

- Tasks
- Authorization
- Categories
- Operator Groups

We'll look at how to create new Operator accounts first, and then explain what each one of these extra things is for, and how to configure it.

Creating the Operator

Note: Before you create a new Operator you should do a search, to make sure they don't already exist in the system. (They may have already worked in other teams, for example).

Method A)

To create an Operator, go to the TOPdesk menu, and choose New > Supporting Files > Operator
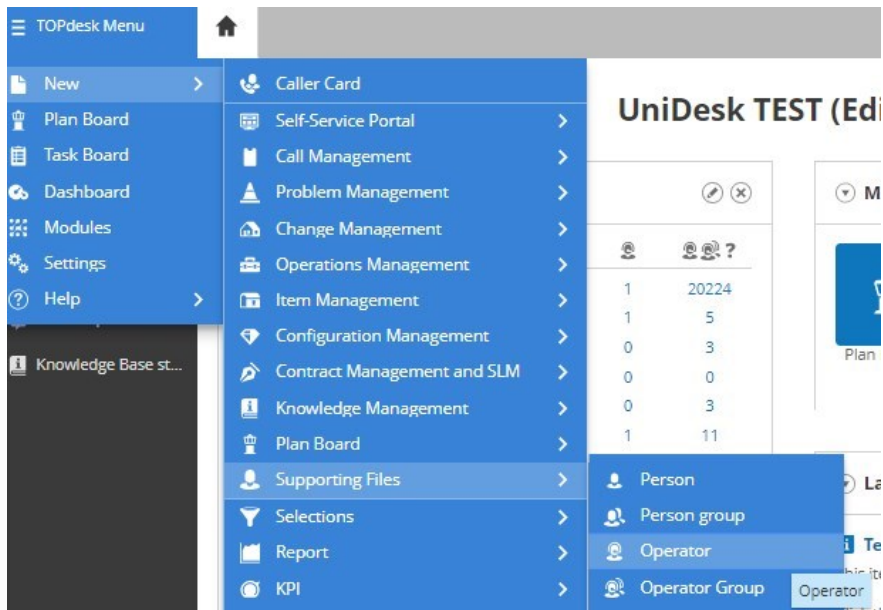
Method B)

Alternatively, you can create an operator from an existing Person card. Using a Person card to create an operator saves you manually keying this information, as it will usually be the right information.

(**Note:** This is just a timesaver - there are still no links of any kind between persons and users/operators.)

Find the Person Card using Search, and then open it. Click the 'Create operator' button.

Login Information

Either way, fill any missing information into the Operator Card, and make sure that the email field is correct.

Then click the 'Edit Login data' button to the right of the Login Name field (small key symbol).

Enter the user as UUN@ed.ac.uk into the login name field for the user, where 'UUN' is the correct username. The @ed.ac.uk bit does not make this an email address, although it might look like one: it's set that way so that the federated access system (Shibboleth) knows the full domain for the username (ed.ac.uk)

Don't forget to tick the 'Login Permission' box, then save the Operator Card. Once the Operator Card has been saved, you will be able to access the other tabs. You need to add Authorization, Operator Groups and Categories now.

Tasks

Tasks are on the main tab of the Operator Card. If an Operator is ticked for a certain task, it will mean they appear in the list for their Groups in that role.

For most people, Call Management is the most important Task to select, either First Line, Second Line, or often both.

Some teams also make use of Problem and Change Tasks as well. As Team Admin, you will probably know which tasks apply to your team.

Authorization

Under the Authorization tab are Permission Groups, which govern permissions to use the different areas of the system. These cannot be added by Team Admins, and must instead be added by a global administrator. Please request Authorization changes by either submitting a UniDesk call to IS Helpline, or emailing IS.Helpline@ed.ac.uk. Appropriate permissions should be requested for your Operator.

For many teams, this will include just IM First Line, and IM Second Line. It may also include PM or ChM Permission Groups if your team is involved with Problem or Change Management.

Things to remember:

- If you are managing a Second Line only team, then you should not request the IM First Line role for your Users.

- If you are in a team which does Problem Management, your users should have the PM Problem Operator role. However, they will only need the PM Problem Management role if they are actually Problem Managers (see this list: https://www.wiki.ed.ac.uk/x/Vx9HBw)

- Incident Operators who need to interface with Problem Management, for example to link Incidents with Problems, should have PM for IM Operators.

You should not request IM or PM Report roles, or any other roles, without explicit guidance.

Category Filter

The Category Filter controls which list or lists of categories a User will see. Everyone gets the 'Junk' category automatically. You should also add the correct Category Filter for your group, to each user in your group.

Under the Filters tab, select the Category filters sub tab. Use the 'Links Wizard' button to add the correct Category Filter(s) to a User.
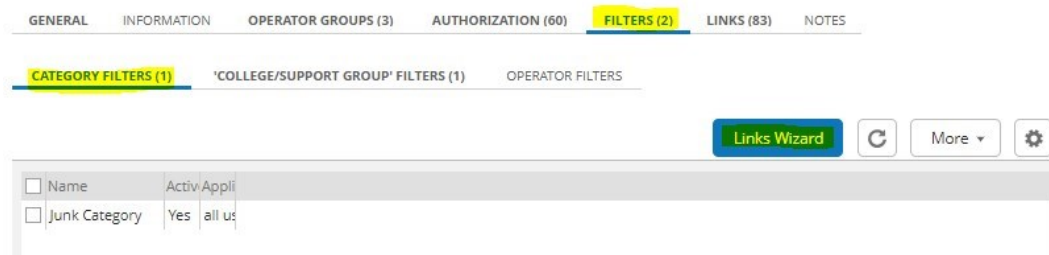
Troubleshooting tip: if an Operator complains that they can only see the Junk Category, it's a good bet that they do not have correctly set Category Filters!

You should not add filters in the Operator Filter or College/Support Group Filter areas.

Archiving the Operator

To archive an Operator, open the Operator card and click the "More" menu. You will then see an option to "Archive". Choose 'No longer valid' as the reason for archiving. You should not do this if the Operator is still active in other Operator Groups.

Editing Memo Fields

Note that Team Admins also have the ability to edit memo fields in UniDesk, such as the request and action fields. This can be useful if sensitive information (should as passwords) have been added to one of these fields. You may also need to have email data removed, where users have mailed this information to your group. Please contact the IS Helpline for help with this.

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