

swDesk

Online Support System

Customer Relationship Management Software
Administrator Manual

Edition 2.1.7 (English)

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Glossary

OS – Operating System

DBMS – Database Management System

DB – Database

HTTP – Hyper-text Transfer Protocol

FTP – File Transfer Protocol

SMTP – Send Mail Transfer Protocol

SSL – Secure Socket Layer

Introduction

The swDesk Online Support System is software that enables the automation processes connected with the activity of user support services. This document contains instructions for Administering and Setting up the swDesk Online Support System.

1. Software Requirements

For a stable swDesk performance, it is recommended to install the system on the server that meets the requirements listed below.

Operating system:	Linux / FreeBSD / Microsoft Windows®
Web server:	Apache version 1.3 (or higher) / IIS
Script interpreter:	PHP version 4.3 (or higher)
DBMS:	MySQL version 4.0 (or higher)

2. Installation

This chapter contains information about swDesk Online Support System installation on the server. Before installation, refer to chapter “2.1. Getting Started”. Then follow the procedure as described in chapter “2.2. Installation Wizard” or “2.3. Manual Installation”.

2.1. Getting Started

Before you begin installation, set up the server and load the files from the archive onto the swDesk server.

2.1.1. Loading Files

To begin, extract all files from the archive to your local drive. Load the extracted files using FTP client on the server into the directory available through the Internet.

2.1.2. Setting Access Rights

Utilizing the following files and directories,¹ set OS users rights for reading and logging-in:

```
admin/configuration/  
admin/configuration/swdeskconfig.php  
admin/public/files/mail/  
public/files/articles/  
public/files/tickets/
```

¹ For those servers running on Linux OS or FreeBSD, this operation is performed by using the **chmod** command. (Example: chmod 0777 filename.php).

2.1.3. Creating a Database

A new or existent² DB is required to install the swDesk Online Support System. You will need the following DB parameters from your web host:

- DB name
- DB server host (or IP address) (in most cases: localhost)
- Port the DB server uses (by default: 3306)
- DB username
- Password

The DB user must have privileges to perform the following commands:

- SELECT
- INSERT
- DELETE
- UPDATE
- INDEX
- CREATE TABLE
- DROP TABLE
- ALTER TABLE
- CREATE TEMPORARY TABLE
- LOCK TABLES

2.1.3.1. Creating a Database Using the Control Panel

Most hosting companies provide their users with the option to use a control panel (for example: cPanel, Ensim, Plesk, etc.) for creating a DB, DB users, and setting all necessary DB access privileges. It is recommended to perform the operations using a control panel if it is installed on your server. Otherwise, read the instructions given in chapter 2.1.3.2.

² If you already use an existent DB that contains tables with data, it is necessary to check if there are any tables that have names beginning with **swd_** or **s2x_** prefixes. If such tables exist, it is better not use the DB as it may cause existent data loss when installing.

2.1.3.2. Creating a Database (advanced users)

To perform the operations described in this chapter, a privileged remote access to the system is required by using Telnet or SSH connections. To connect to MySQL server, you should perform the following system command:

```
shell> mysql --user=DB_USER --password=DB_PASSWORD
```

To create a DB, use SQL command – CREATE DATABASE. Instead of swDesk, you can login any database name, for example: support, support_system, etc.

```
mysql> CREATE DATABASE swdesk;  
Query OK, 1 row affected (0.12 sec)
```

Perform the following SQL command to create a new user 'swdesk_user' with the password 'swdesk_password' and database privileges 'swdesk', necessary for correct swDesk system performance:

```
mysql> USE swdesk;  
Database changed  
  
mysql> GRANT ALTER,CREATE,CREATE TEMPORARY TABLES,DELETE,DROP,INDEX,  
INSERT,LOCK TABLES,SELECT,UPDATE ON swdesk.* TO swdesk_user@localhost  
IDENTIFIED BY 'swdesk_password' WITH GRANT OPTION;  
  
Query OK, 0 rows affected (0.00 sec)
```

Note:

The same command can be used to assign necessary privileges to the existent user.

2.2. Installation Wizard

The recommended method of installation for the swDesk Online Support System is to use the installation wizard. Before launching the installation wizard, follow the steps described in chapter 2.1.

To begin the installation wizard, open the address where the swDesk Online Support System is located. For example, if your address is 'www.yourcompany.com', and swDesk system is located on the server in directory/support/, you can start the installation wizard by opening the following addresses:

- www.yourcompany.com/support/
- www.yourcompany.com/support/install/

Once you launch the installation wizard, simply follow the onscreen instructions.

Note:

If you are unable to launch the installation wizard, you may need to add index.php after the address. For example: www.yourcompany.com/support/index.php. If this does not correct the issue, please follow the directions described in chapter 2.3.

Caution!

It is strongly recommended to delete the install directory from your web server.

2.3. Manual Installation (advanced users)

To install the swDesk Online Support System, you must follow the procedure described in this chapter. In order to perform manual installation, you may require a Telnet or SSH connection.

2.3.1. Adding DB tables

Before adding a table, make sure that the database and user with privileges, as described in chapter 2.1.3., have already been created.

The SQL-script for creating database tables is located in the directory **install/sql/**. The full path to the file is located at: `install/sql/swdeskdb-mysql.sql`

You can execute this file using additional software, for example: phpMyAdmin³ or using the system console.

To execute the SQL-script from a system console use the following command:

```
shell> mysql --user=DB_USERNAME -p --database=DB_NAME < ./swdeskdb-mysql.sql
```

Example of SQL-script execution:

```
shell> cd /var/www/support/install/sql/  
shell> mysql --user=swdesk_user -p --database=swdesk < ./swdeskdb-mysql.sql  
Enter password: *****
```

2.3.2. Configuration Files

It is recommended that you copy and edit templates of the configuration files. The templates can be found in the directory **admin/configuration/**:

- `configuration.adv-install`
- `swdeskconfig.adv-install`

³ www.phpmyadmin.net

Change the file's extension to '.php':

- configuration.php
- swdeskconfig.php

Then edit the file 'configuration.php' and change the parameters: <EMAIL_ADDRESS>, <DATABASE_NAME>, <DATABASE_USER>, <DATABASE_PASSWORD> и <DATABASE_HOST> to corresponding real values. Edit the files 'swdeskconfig.php' and change the parameters: <URL_TO_SWDESK>, <COMPANY_NAME> и <COMPANY_URL> to corresponding real values. After which, the swDesk Online Support System installation is complete.

3. Setting up

By default, the administrator can login to the system with a username and password of 'Administrator'. It is recommended that you change the password once you are logged in.

Note:

Both the password and username in the swDesk Online Support System are case sensitive.

Tip:

A new password must consist of a minimum of 6 characters, with letters of different case, characters and symbols. Example: 2swDesK*7, 06_Jane, etc.

Once swDesk is successfully installed, the administrator must perform the following tasks before using the swDesk Online Support System:

- Setting up (see chapter 4.1);
- Setting up privileges (see chapter 4.2);
- Entering ticket categories list (see chapter 4.4);
- Adding technicians (see chapter 4.5);
- Additional operations:
 - Adding Canned Responses (see chapter 4.6);
 - Knowledge Base planning and adding articles (see chapter 4.6);
- Starting scheduled tasks (see chapter 5).

Chapter "4. Administrative Tools Overview" describes how to perform the above-mentioned operations.

4. Administrative Tools Overview

This chapter describes the basic administrative tools for swDesk Online Support System management.

4.1. System Settings

To gain access to the 'System Settings' module, choose the 'Administrative Tools' option in the main menu and then click 'System Settings' in the pop-up menu.

4.1.1. Tab 'Database Settings'

In this tab, you can change the current DBMS settings. Every parameter corresponds to a certain variable in the system configuration file 'admin/configuration/configuration.php'. Details for each parameter are described in table 4-1.

Table 4-1

Name	Name of the variable in the configuration file	Description
Database Type	'db' => 'type'	Type of DBMS. In this operation, only 'MySQL' is supported.
Host / IP Address	'db' => 'host'	Hostname or IP address of the DB server.
Port	'db' => 'port'	Port the DB server uses.
Database Name	'db' => 'database'	DB name.
Username	'db' => 'username'	DB user.
New Password	'db' => 'password'	DB user password.
Persistent Connection	'db' => 'persistent'	Persistent connection support with the DB server. This can be used in the configuration file using the following parameters: 1 – Yes, 0 – No.

4.1.2. Tab 'Mail Options'

This tab allows you to configure mail parameters. After the changes have been made, new values will be used by the swDesk Online Support System. swDesk supports three ways of sending mail:

- **SMTP**

If using the SMTP server method to send mail, you must enter the following parameters in the group 'SMTP Options':

- Host / IP Address (default of localhost);
- Port (default of 25);
- Username;
- Password;
- Timeout (default of 5 seconds).

- **PHP mail()**

More detailed information on the PHP mail() function for sending mail messages is available at the PHP web site: www.php.net.

- **Sendmail**

If using the sendmail method, make sure that the path to the utility set up in the group 'Sendmail Options' is correct for your operating system.

Note:

The sendmail utility is available only for Linux and FreeBSD operating systems. You cannot use this method without additional software for Microsoft Windows® OS.

Every parameter corresponds to a certain variable in the system configuration file 'admin/configuration/configuration.php' Details for each parameter are described in table 4-2.

Table 4-2

Name	Name of the variable in the configuration file	Description
Mailing Method	'mail' => 'mail_method'	The method for sending mail messages. Accepted values are: 'mail', 'smtp' and

		'sendmail'.
Path to Templates	'mail' => 'templates_dir'	Path to the mail templates. Default location of the templates: 'admin/public/files/mail/'. In this parameter, the path must be given according to the administration bar directory.
SMTP Options		
Host / IP Address	'mail' => 'smtp' => 'host'	Hostname or IP address of the SMTP server.
Port	'mail' => 'smtp' => 'port'	The port that the SMTP server uses.
Username	'mail' => 'smtp' => 'username'	Username for SMTP server authorization.
Password	'mail' => 'smtp' => 'password'	User password for SMTP server authorization.
Timeout (seconds)	'mail' => 'smtp' => 'timeout'	Reply timeout period for SMTP server in seconds.
Sendmail Options		
Path to Sendmail	'mail' => 'sendmail'	Path to Sendmail utility.

4.1.3. Tab 'Additional Options'

This tab can be used to configure general system parameters. However, for correct system performance, it is necessary to modify such parameters as: 'Supervisor Email' and 'Supervisor Name'. In case the swDesk Online Support System fails to define the sender's address while sending mail messages, the address given in the parameters is used. You can use an existing address or a dummy address (for example: noreply@yourcompany.com).

Parameters: 'Log failed login attempts' and 'Log failed attempts to load module' will be written to the swDesk logs.

Authorization Type.

You may also define the authorization type by configuring the 'Authorization Type' parameter value. This allows you to choose your preferred authentication method. You may login via a web form or via an HTTP Authorization window. This option is applicable only for the swDesk Administrator and Technician login. By default, the value of this parameter is set to 'HTML login form'. To bypass the web form login method, you should set this parameter to 'HTTP authorization'.

Note:

HTTP authorization is not supported by all web-servers; also PHP must be compiled as a dynamically loaded module rather than CGI.

Every parameter corresponds to a certain variable in the system configuration file 'admin/configuration/configuration.php.' Details for each parameter are described in table 4-3.

Table 4-3

Name	Name of the variable in the configuration file	Description
Supervisor Email	'supervisor' => 'email'	Mail address of supervisor.
Supervisor Name	'supervisor' => 'name'	Supervisor name.
Log failed login attempts	'log' => 'failed_login'	If this parameter set enabled, all attempts to login the system will be logged in the system log.
Log failed attempts to load module	'log' => 'failed_loadmodule'	If this parameter set is enabled, all errors that occur when loading modules will be logged in the system log. If problems still exist, contact swDesk support services.
Authorization Type	'auth' => 'type'	Authorization Type. Accepted values are: 'session' and 'http'.
Check SSL	'auth' => 'ssl'	If this parameter set is enabled, the user will be able to login the system only if there is a connection protected by SSL certificate.

4.2. SwDesk Preferences

This module allows you to modify the system so that it will meet the user support system for your company. For access to the module, choose the 'Administrative Tools' option and click 'swDesk Preferences' in the pop-up menu.

4.2.1. Tab 'General Information'

This tab allows you to configure basic parameters of swDesk. Every parameter corresponds to a certain variable in the system configuration file 'admin/configuration/swdeskconfig.php'. Details for each parameter are described in table 4-4.

Table 4-4

Name	Name of the variable in the configuration file	Description
swDesk URL	\$cfg_roothost	Path to swDesk. Example: www.yourcompany.com/support/
Users must register before submitting tickets	\$cfg_registration_required	This parameter defines the necessity of registration for ticket submitting/sending. Parameter default point – 'No'.
Validate user email address after registration	\$cfg_register_emailvalidate	This parameter defines the necessity of email address validation after registration. If the parameter is set as «Enabled», after registration, a message will be sent to the user asking to validate his email address. The user also will receive instructions to click a link, which makes their account active. Parameter default point – «No».
Company Name	\$cfg_company_name	Your company name.
Company Web Site	\$cfg_company_url	Your company Web Site.

4.2.2. Tab 'Ticket System'

In this tab, you can configure the parameters for the subsystem responsible for passing user support requests. The tab contains parameters for web interface as well as for scheduled tasks⁴ of the subsystem. Every parameter corresponds to a certain variable in the system configuration file: admin/configuration/swdeskconfig.php.

Description of the parameters:

'String that will separate technician replies'

⁴ See chapter 5

This parameter helps to separate technician messages from user replies. The parameter point is entered in the first line of the email, which is sent to the user after the technician reply.

Name of the variable in the configuration file: **\$cfg_ticket_comment_separator**.

Example:

The user submits the ticket with the message:

```
Hello!  
I cannot login to my account. Can you help me?  
  
Sincerely,  
John Doe
```

Having analyzed the ticket, the technician replies. The reply that the user receives can be as follows:

```
----- Enter your message ABOVE this line -----  
Dear John,  
Please send us your account number ID and your mailing address.  
Thank you!
```

The user clicks the 'Reply' button in his mail client, enters his reply and sends the message. The script responsible for email messages transfers to the DB, searches by the separator and records the reply without the technician's message.

'Create new tickets from unrecognized emails'

If this option is enabled and your server is able to run a script responsible for transferring email messages to the DB, a new ticket will be created for all emails with unrecognized addresses. If this option is not enabled, then email will simply be deleted.

Name of the variable in the configuration file: **\$cfg_ticket_email_createticket**.

'Require technicians to enter reason when transferring tickets'

This option defines the requirement for technicians to enter a reason when transferring tickets from one category to another.

Name of the variable in the configuration file: **\$cfg_ticket_reason_required**.

'Close tickets if user does not reply for XX days'

This option can only be enabled if your server runs script, which closes the tickets that users do not reply to. You must enter the number of allowable days for the user to reply. To disable this option, enter 0 (zero).

Name of the variable in the configuration file: **\$cfg_ticket_close_unanswered.**

'Send auto-reply email to user after he/she submits a ticket'

If this option is enabled, an email confirmation will be sent to the user saying that their ticket was received. You can edit the email template, which is located in:

admin/public/files/mail/ticket_new_user.seml

Name of the variable in the configuration file: **\$cfg_ticket_newticket_autoreply.**

Note:

This option also applies to the script that transfers email messages to the DB. If this parameter set is enabled, it may lead to a slow script performance. It is recommended for use at a minimum or average load (up to 90 mails per 5 minutes) *.

'Allow users to post attachments with tickets'

If the option is enabled, the user is allowed to attach files to the tickets. This option also applies to the script transferring email messages to the DB (files attached to the messages are loaded on the server and are attached either to the ticket or the ticket comment).

Name of the variable in the configuration file: **\$cfg_ticket_allow_attachments.**

Note:

If you allow users to load the files on the server, you run the risk of damage to the security system. Enable this option only when you are confident in the safety of the server security system.

'Maximum attachment size accepted (bytes)'

This refers to the maximum accepted size of the attachment. This option is only available if it is allowed to load files on the server. The value must be entered in bytes (1 Kb – 1024 bytes).

Default of 250 Kb.

Name of the variable in the configuration file: **\$cfg_ticket_attachment_maxsize.**

* Correspondingly, if the script starts up every 5 minutes.

'Allowed file extensions'

Only the listed file extensions are allowed to load on the server. Separator – comma (example: gif, jpeg, png).

Name of the variable in the configuration file: **\$cfg_ticket_allow_types**.

4.2.3. Tab 'Knowledge Base'

This option allows you to configure special parameters for «Knowledge Base» subsystem. All parameters listed below correspond to certain variables in the configuration file: admin/configuration/swdeskconfig.php.

Description of the parameters:***'Is the Knowledge Base visible for users?'***

If the parameter set is enabled, the links to the Knowledge Base will not be displayed in the Front Side of swDesk. This parameter is useful when your Knowledge Base is in the process of filling.

Name of the variable in the configuration file: **\$cfg_kb_visible**.

'Number of top rated articles on the front page'

This option defines the number of articles sorted by user rating on the front page of the DB.

Name of the variable in the configuration file: **\$cfg_kb_toparticles_number**.

'Number of new and updated articles on the front page'

This option defines the number of new or updated articles on the front page of the DB.

Name of the variable in the configuration file: **\$cfg_kb_newarticles_number**.

'Number of categories to be displayed per row'

This option defines the number of categories displayed per row. You can change this option to better match your site's layout.

Name of the variable in the configuration file: **\$cfg_kb_categories_per_row**.

'Allow users to post comments to articles'

If this option is enabled, the user is allowed to post comments to articles.

Name of the variable in the configuration file: **\$cfg_kb_allow_comments**.

'Allow articles rating'

If this option is enabled, the user is allowed to set articles rating.

Name of the variable in the configuration file: **\$cfg_kb_allow_rating**.

4.2.4. Tab 'Miscellaneous'

Additional options may be set within this tab. Every parameter corresponds to a certain variable in the configuration file 'admin/configuration/swdeskconfig.php'. Details for each parameter are described in table 4-5.

Table 4-5

Name	Name of the variable in the configuration file	Description
Number of news items on the front page	\$cfg_news_showmax	Parameter point defines the number of news items displayed on the front page in the Front Side of swDesk.
Display News	\$cfg_news_display	Using this parameter, you can either allow or forbid news to be displayed on the front page in the Front Side of swDesk.
Allow users to select a language	\$cfg_lang_allowselect	Using this parameter, you can either allow or forbid the use of Multilanguage user interface in the Front Side of swDesk.

4.3. Access Management

With the swDesk Online Support System, you have the option to set different access rights for groups of technicians. The two groups available by default are: 'Administrators' and 'Technicians' with corresponding privileges. You can change the privileges or add new groups using the 'Technician Groups' module. To open this module, click the 'Administrative Tools' button and click 'Technician Groups' in the pop-up menu.

4.4. Ticket Category Management

Before technicians and users can operate the swDesk Online Support System, the administrator must first add ticket categories. The names of the categories may be similar to the names of the departments in your company. For example: Sales, Technical Support, General Inquiry, etc. To open the ticket category management module, click on the 'Tickets' button and then click 'Categories' in the pop-up menu.

4.4.1. Adding a Category

To add a category, click the 'Add a Category' link on the left navigation bar in the open category module.

4.4.1.1. Category Basic Parameters

Name

Enter the name of the category in this field; the name will be displayed on all pages in the Administrator Control Panel and the Front Side of the system.

Visible

If this option is disabled, users will not be able to add tickets to the category.

Signature for email letters

By entering your signature in this field, it will be added to the technician messages when replying to the user.

4.4.1.2. E-mail Settings

Email Address

This is the email address for the category. This address is used as a sender's address when the technician replies to the user's ticket.

Send a notification to this address when user submits a new ticket

If this option is enabled, the system will send an email letter to the category address when the ticket is created.

Note:

Do not use this option if you run the script that transfers email messages to the DB as it will lead to ticket re-entry to the DB.

Mail Server Type*

The type of mail server checking tickets submitted by email.

Mail Server Host*

The Hostname or IP address of the mail server.

Username*

The name of the user reading messages in the email inbox.

Password*

The user password for reading messages in the email inbox.

4.4.1.3. Assigned Technicians

In the 'Assigned Users' group, you can define the list of technicians responsible for user tickets in the category. The technicians assigned to the category will be able to read and reply to the tickets submitted to this category.

* This parameter is used only by the script that transfers email messages to the DB. If you do not use the script, you can skip the parameter.

4.5. Technicians Management

To open the Technicians Management module, click on the 'Administrative Tools' button and then click 'Technicians' in the pop-up menu.

Using the 'Technicians' module, you can create an unlimited number of accounts for the technicians and administrators. To add new technician and administrator accounts, click on the 'Add a Technician' link on the left navigation bar. Details for each parameter of the account are described below.

4.5.1. General Information

Group Name

The group name allows users to be sectioned into groups. User groups dictate the privileges within the group. (See chapter 4.3).

Username

The login used for user authorization.

Password

User password.

Note:

The password and login in swDesk are case sensitive. For example: login 'Guest' and 'guest.'

Full Name

The full name of the user.

Email Address

The personal email address of the user.

Email user account information after account is added

This option is available only when adding a user account. If the option is enabled, the user will receive an email message containing the user's login and password upon successful account creation. You can edit the email template, located at:
admin/public/files/mail/admin_users_sendinfo.seml

Description

The description of the user.

4.5.2. Access to swDesk system categories

The swDesk categories are listed within this group. You can assign the user to one or several categories when adding a user account (See chapter 4.4.)

4.5.3. Additional Settings**Account Status**

Using this option, you can set the current account status for a user. For example, if you want to temporarily forbid the user to login the system (to lock the account), enable the 'Blocked' option.

Expires On

This option can be used when creating a temporary account. To create a temporary account, you must enable the 'Expires On' option and choose the account expiration date. Upon expiration, the user account will be saved and the user will not be able to login to the system.

Log User Actions

This option enables/disables users' login activities.

Startup Module

This option defines the module that will start when the user logs into the system. This option can be used if you want to set a specific startup module, such as the ticket management module. You must choose the module available for the group of users; otherwise, the error message will appear. It is recommended that administrators choose 'Home Page (Administrators)' module, while technicians choose 'Home Page (Technicians)' module.

4.6. Canned Responses

This subsystem allows technicians to solve the user problems in a more efficient way. A list of templates with answers to FAQs and other general questions is created for every category, and the list is constantly updated. The technicians have access to the templates in the categories they are assigned, and the ability to use them to respond to user inquiries. To open the 'Canned Responses' module click 'Tickets' button and then click 'Canned Responses' in the pop-up menu. To add a response template, click 'Add a Response' link on the left navigation bar.

4.7. Knowledge Base

The swDesk Online Support System has a built-in subsystem 'Knowledge Base'. Using this subsystem, the clients of your company can find the answers to the frequently asked questions. For better efficiency, it is recommended to update and analyze the article rating in the Knowledge Base.

4.7.1. Categories

Categories in Knowledge Base can have an unlimited number of levels. You can view the list of categories or add new categories using the 'Categories' module. To open the module, click the 'Knowledge Base' button and then click the 'Categories' button in the pop-up menu. Details of each category parameter in the Knowledge Base are described below.

Name

The name of the category. This name will be displayed on the pages of Knowledge Base in the Front Side of swDesk.

Parent Category

Parent category. Using this parameter, you can set the category level. If you choose 'Top Level', the category will have the top level.

Visible

This parameter defines the availability of the category and article view, which are in the Front Side of swDesk.

Requires Login

If this option is enabled, the users can view the content of the category only when they register and login to the system in the Front Side of swDesk.

Description

Short description of the category content. The text, entered in this field, will be displayed on the pages of Knowledge Base in the Front Side of swDesk.

Related Categories

In this group, choose the list of category articles that are related to the articles of the category.

Assigned Technicians

In this group, you must choose the technicians responsible for category management and updating.

4.7.2. Articles

You can view the list of articles or add new articles using the 'Articles' module. To open this module, click on the 'Knowledge Base' button and then click the 'Articles' button in the pop-up menu. Details of each article parameter in the Knowledge Base are described below.

Category

This parameter defines the article location. Users can read the article when they choose the category in the Front Side of swDesk.

Article Title

The short title of the article.

Approved

If the parameter is set as 'No', the article will not be displayed in the Front Side of swDesk. This parameter can be useful if the editor checks the content of your web site. The technician who writes the article can set it as unchecked, and the editor will find it in the list of unchecked articles when opening the list of articles. Then the editor can change the setting to 'approved.' at which time the users can read the article. If there is no need to check the article, you can set this parameter as 'Yes'.

Question

In this field enter frequently asked question (FAQ).

Answer

The answer to the FAQ must be entered in the same field.

Keywords

Keywords for finding the article. Keywords must be separated with commas. For example: problem, report.

Upload Attachment

You can also attach a file to the article. Users can upload this file from the Front Side of swDesk.

Related Articles

The list of related articles. This list will be displayed when you view the article in the Front Side of swDesk.

5. Scheduled Tasks

This chapter provides a description and list of scripts that must be launched with the help of the system scheduler. It is recommended to use the system demon CRON for Linux and FreeBSD OS and the utilities 'System Scheduler' or additional software for Microsoft Windows® OS. The default location of the scripts to be launched with the help of the system scheduler is located in the directory – admin/stasks/.

5.1. Email Auto Check

You can set swDesk so that users can send and reply to tickets using email while the technicians can read and answer the users' questions by using the web interface. A special script is used to convert the letters in the ticket category email box into the tickets in the DB.

Path to the script:

admin/stasks/get_tickets_from_mbox.php

Launching period:

It is recommended to launch this script every 5-15 minutes.

5.1.1. Ignore List

Some messages can be identified as service messages. To ignore automatically, add email address or sender's name to the Ignore list. To edit the Ignore list, click the 'Tickets' button and then click the 'Ignore List' button in the pop-up menu.

5.2. Closing Unanswered Tickets

A ticket will remain open if a user doesn't reply after a technician has responded and solved the issue. In this case, it is recommended that you use the script that closes the ticket if the user doesn't answer within several days (You can change the number of days in System Preferences of swDesk system. See chapter 4.2).

Path to the script:

admin/stasks/close_unanswered_tickets.php

Launching period:

It is recommended to launch the script every day at 00:00 AM.

5.3. Knowledge Base Subscription

In the Front Side of swDesk, users can subscribe to the mailing list and receive new or updated articles. If your company uses the 'Knowledge Base' subsystem, you must launch the script to find and inform the user about updates in the Knowledge Base by email, according to his settings.

Path to the script:

admin/stasks/kb_subscriptions.php

Launching period:

It is desirable to launch the script every day at 00:00 AM.

5.4. Email Reminder

There is task planning and organizing module for technicians in the swDesk Online Support System. This script contains the function of the «alarm-clock», which provides an automatic reminder to complete the task by email.

Path to the script:

admin/stasks/task_email_reminder.php

Launching period:

It is recommended to launch the script every day at 00:00 AM.

6. User Interface Customization

You will need to customize the user interface in the Front Side of the swDesk Online Support System, according to your company's web site. In swDesk (version 1.1), you can do that by changing CSS styles and by editing the header and footer of the pages in the Front Side. To do so, a basic knowledge of CSS and HTML languages is required.

You can set the types, their sizes and block colors in the main types description file, which is located in: `public/css/main.css`.

The header for the Front Side of swDesk is located in the following files:

- **templates/header.html**

The template is displayed before the content on all pages of the Front Side of swDesk.

- **templates/header_blank.html**

The template is used as a header when displaying pop-up windows (For example, this template is used when displaying the box for entering the article comment).

- **templates/header_print.html**

The template is used as the header to view the print version of the page.

Consequently, the footer in the Front Side of swDesk is displayed after the content and is located in the following files:

- **templates/footer.html**

- **templates/footer_blank.html**

- **templates/footer_print.html**