

# Help for Administrators

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# Task Options

## Category Options

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To edit Category Options, go to Control Panel, select Knowledge Base, and click Category Options at the left hand side.

Category not the same as the task categories for the sole reason that there should be more of these categories than there are task categories.

Using the Category Option helps you organise your Knowledge Base better rather than having loads of info under the one Category you can have separate parts for that category i.e. Editing, Printing

## Task Priorities

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Task Priorities are the possible priorities of the tasks. The range is from a very high priority to a very low priority. The lower the rank, the higher the priority. The response time reflects the amount of time that can pass before the task is escalated.

You can change these to any you wish, to suit your needs.

## Task Status

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This allows you to set or change the status levels used in the system.

In OneOrZero the final task status (i.e. Closed) must be set to the highest unique rank for functions such as task closure notifications, task grouping and task searching and reporting to work correctly.

## Task Severity

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This is a new feature in 1.6.5

This allows you to have a Level of Issue i.e. system out - minor, server out - major

## Task Projects

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This is a new feature in 1.6.5

Ability to list different Task Projects

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# Task Groups

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Task Groups are groups of tasks that can be created to keep track of stats and to separate task types logically.

You can edit the groups in this area to suit your needs.

# Task Feedback

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Task Feedback allows you to set ratings that are based on a scale of 1 being the lowest rating and 5 being the highest. You can set the wording of each level to what you need.

## User Options

### Add New User

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This allows you to add a new user to the system setting the following details: First Name, Last Name, Email Address, Password, Office, Phone Extension, Level, Email Subject Routing String, Task Manager Groups, User Groups

### User Groups

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Use this section to specify groups for your users (for example Sales) and control the tasks users can work with plus the field values available for them to work with.

You can specify the values available in many of the task fields by using the user group 'Allowed' option as described below:

**Allowed Task Manager Groups** - This allows you to set the Task Manager Groups available to the User Group. More than one can be used.

**Allowed Task Projects** - This allows you to set the Task Projects available to the User Group. More than one can be used.

**Allowed Task Groups** - This allows you to set the Task Groups available to the User Group. More than one can be used.

**Allowed Task Categories** - This allows you to set the Task Categories available to the User Group. More than one can be used.

These settings apply to installations where the system is setup for Private access i.e. users must logon. If the system is set to Public users see all available field values.

These settings DO NOT affect Task Managers and Administrators

## Task Manager Groups

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Use this section to specify groups for your supporters / task managers

For example, Helpdesk or Network Admin.

Remember having multiple support groups can be useful if you operate as separate teams as it allows a supporter to concentrate on their tickets and their groups tickets without being distracted by those tickets raised in other groups.

However the downside to having multiple groups is that a task manager in one group will not see any of the tickets from another group (they are not in) unless they do a global search, this can affect how soon a ticket is seen and remedied.

Make sure no matter how many groups you have set up that you have one group set as default.

Failing to set a group as default could result in tasks not showing in expected areas (ie from My Groups Recent Tasks)

To set a group as default, place a dot next to the group in the default column and then select 'update'

This is needed to be set to allow members in User Groups access to the Task Manager/s.

## User Search

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This allows you to search for a user on the system and displays that user and allows you to: delete, change password, change level, or edit their profile.

# Themes

## Themes

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This allows you to edit, delete, or add new themes to OOZ.

**Add a new Theme** To add a new theme click on the "Add New Theme" Link.

Set all the required details you need.

Click on Add.

Your new theme has now been added!

**Edit a Theme** To edit a theme click on the edit link next to the theme you wish to edit. This will take you to the editor page, where you can change the colour layouts, image location, Font, Font Size, System Logo.

**Delete Theme/s** To delete theme/s click in the tick box next to the theme/s you need to delete then click on Submit Changes.

# Attachments

## Attachments

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The Attachments option under Control Panel allows you to search for attachments that have been placed in the OOZ System, and manage them i.e. delete.

This can be especially useful if you are deleting a lot of tickets.

When a ticket is deleted any attachments associated with the ticket are often left behind.

Use this page to remove the unwanted attachments by clicking on Delete? in the left hand column.

Be warned - Once their gone, their gone (unless your a good helpdesk who backs up their data every night of course)

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# Templates

## Templates

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This allows you to add a new template, edit an existing, delete an existing template or restore a template that has been changed.

**Adding a new template** To create a new template give it a name then click on New Template.

**Edit Template** To edit a template select the template you wish to edit from the drop down box, then click on Edit. This will bring up the editor screen.

When you have edited the template click on Submit Changes.

**Delete Template** To delete a template select the template you wish to edit from the drop down box, then click on Delete.

**Restore Templates** To restore all the templates click on Restore Templates.

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**Tip:** You can use the variable '\$ticket[description]' in template called 'email\_group\_page' to get a description in your email when some user open the ticket.

# Check Consistency

## Task Check

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This will perform a number of checks on the validity of the data stored in the tickets database.

Due to One or Zero's relational database design it is possible (however unlikely) for a record to be removed / edited in one table without a corresponding record in another table being similarly deleted / modified.

This function will tell you if any problems exist, allowing you to try and solve them before things get too out of control.

# Knowledge Base Check

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This will perform a number of checks on the validity of the data stored in the knowledge base.

Due to One or Zero's relational database design it is possible (however unlikely) for a record to be removed / edited in one table without a corresponding record in another table being similarly deleted / modified.

This function will tell you if any problems exist, allowing you to try and solve them before things get too out of control.

## OneOrZero Settings

### OneOrZero Settings

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#### Settings for OneOrZero

*To access the settings for OneOrZero you will need to be logged in as an Admin.*

To access the settings, at the top of the OneOrZero Page click on Control Panel, then click on OneOrZero Settings.

**Task Management System Name:** This allows you to set a name for your task management system i.e. ABC Company HelpDesk

**Administrator Email:** Enter the email address for the administrator of the t.m.s

**Public / Private:** allows you to set the public or private mode.

**TMS On / Off:** this allows you to switch the TMS on or off (you could set it to off if you are doing work on it or updates)

**If your task management system is off, please enter a reason:** use this to tell users why the TMS is off.

**Default Theme:** set the default theme for the TMS

**Default Language:** set the default language for the TMS

**Forum:** if you have a forum you are using with the TMS you can switch it on or off here

**Forum Site URL:** enter the address of the forum

**Users to list per page:** set the number of users to be list per page

**Number of announcements to list:** set the number of announcements to be displayed in a list.

**Enable Last Task Action:** enable or disable view of last action to a task.

**Characters to show in the Last Task Action:** set the number of characters to display in the last task action view.

**Show all log updates to client:** enable or disable show all log updates to client.

**Task Ratings:** enable or disable task ratings.

**Service Level Tracking Status:** enable or disable service Level Tracking Stats - this should be left on even if you do not wish to collect reporting data now, as you may need it in the future.

**Stats Status:** enable or disable that statistics in the footer of oneorzero showing the page rendering and MySQL performance.

**SSL Status:** enable or disable SSL (secure site).

**Knowledge Base Status:** switch the Knowlege base on or off.

**Task Feedback:** enable or disable task feedback.

**Task Attachments:** enable or disable task attachments.

**User Attachments:** enable or disable user attachments.

**Knowledge Base Attachments:** enable or disable knowledge bas attachments.

**Knowledge Base Purge Level:** set the Purge Level to Always, Never or Prompt.

**Who's Online Status:** enable or disable viewing of whos online

**User Selection for Task Manager Tasks:** Select who to display on the user selection, turn off to not show any users, Users Only - only display users who are set as users, All - dispaly all users including task managers.

**User List Display Option:** Select how to display a user in the list username or fullname

**Logged Date Override:** enable or disable over-ride of date task was enterd into OneOrZero

**Pager Gateway:** switch the pager gateway on or off

**Lowest Task Priority to Page:** Set the lowest priority, set by default by LOW

**Task Feedback:** enable or disable task feedback

**Password Retrieval:** enable or disable password retrieval

**User Account Registration:** set the user account registration off, register - requires approval, register - immediate activation

**Immediate Activation Access Rights:** set the level of access a user gets after activation: Viewer or User

**User Group Rights Control User Field Values:** When set to 'On' the user groups configuration (refer to user groups for more information) sets the available values in fields such as 'Project', 'Category' etc.

**Enable Announcement Security:** When set to 'On' announcements are only shown to those users or groups set when the announcement was created

**User and Viewer Profile Editing:** enable or disable the user and viewer profile editor.

**Show Update Log Within Task Manager Task View:** switch the update log view for task manager task view on or off.

**Allow Task Managers To Edit Announcements:** enable or disables the right to allow task managers to edit announcements.

**Allow Reporting For Task Managers:** enables or disables task managers ability to run reporting tools

**Show Users Group Tasks:** enables or disables the 'My Groups Open' and 'My Groups Closed' tasks in the user view

**Show Documentation:** enables or disables the inline user documentation

**== LDAP Settings: == *NOTE: DO NOT attempt to use this feature unless you are familiar with both general LDAP functionality and specific syntax of your particular type/brand of LDAP Directory Services. Doing so can result in, not only, LDAP/network interruptions to your environment, but also may pose severe security risks if you do not know what you are doing. Most LDAP servers are case-sensitive regarding Attribute/Property syntax!***

## Authentication Method:

### **DB:** *(default)*

Use this setting if you do not want to use LDAP and you want to authenticate to the One or Zero user database only.

### **LDAP:**

Use this setting if you want to authenticate using any LDAP server (other than Active Directory -- see below).

Works with various/most LDAP servers but use AD if you are running Windows Active Directory.

### **AD:**

Use this setting if you want to authenticate using Windows Active Directory.

AD is extremely case sensitive, especially LDAP Username Attribute: samaccountname <-- *MUST ALL BE LOWER-CASE*

**LDAP hostname or IP:** -- Enter the hostname or IP address of your LDAP/AD server

*Example for LDAP and/or AD:* 'www.domain.com' -or- '192.168.1.1'

**Windows/AD Domain (Windows only):** -- Enter your Active Directory domain. Use only with AD and not with (standard/non-AD) LDAP.

*Example for AD:* 'domain.com'

**LDAP Bind Username and Context:** -- May be left blank if anonymous bind is supported. Otherwise, enter the username and context of a user who has rights browse the LDAP/Directory Services tree.

*Example for LDAP:* 'CN=username,OU=container,O=organization'

*Example for AD:* 'CN=username,CN=container,DC=domain,DC=com'

*Alternate AD:* 'username@domain.com' (try when the username is in an OU)

**LDAP Password:** -- May be left blank if anonymous bind is supported. Otherwise, enter the password for the user account you assigned as the *LDAP Bind Username and Context* above.

**LDAP Root Context:** -- Enter the highest level of context you wish to start your LDAP search for the login user name. The user name search is started at this level/container and then searches all levels/containers within and below this context, only. It will only search subordinate levels, not parallel or higher contexts. Any user trying to log in, while using the LDAP/AD authentication, must be in this container or below it to be able to sign in.

```
Example for LDAP:      'O=organization'  
Example for AD:       'CN=users,DC=domain,DC=com'
```

**LDAP User Search Attribute:** -- Enter the LDAP attribute for the UserAccount or UserID property of your LDAP server (usually the same as the 'LDAP Username Attribute'). This is specific to the type/brand of LDAP server you are currently using for your directory services.

```
Example for LDAP:      'cn' <-- only lowercase!  
Example for AD:       'sAMAccountName' <-- CASE-SENSITIVE!
```

**LDAP First Name Attribute:** -- Enter the LDAP attribute for the First Name property of your LDAP server. This is specific to the type/brand of LDAP server you are currently using for your directory services. NOTE: Your user must have a first name set.

```
Example for LDAP:      'givenname' <-- only lowercase!  
Example for AD:       'givenname'
```

**LDAP Last Name Attribute:** -- Enter the LDAP attribute for the Last Name property of your LDAP server. This is specific to the type/brand of LDAP server you are currently using for your directory services. NOTE: Your user must have a last name set.

```
Example for LDAP:      'sn' <-- only lowercase!  
Example for AD:       'sn'
```

**LDAP Username Attribute:** -- Enter the LDAP attribute for the Username property of your LDAP server. This is specific to the type/brand of LDAP server you are currently using for your directory services.

```
Example for LDAP:      'cn' <-- only lowercase!  
Example for AD:       'samaccountname' <-- CASE-SENSITIVE!
```

**LDAP Email Attribute:** -- Enter the LDAP attribute for the Email property of your LDAP server. This is specific to the type/brand of LDAP server you are currently using for your directory services. NOTE: Your user must have an email address set.

```
Example for LDAP:      'mail' <-- only lowercase!  
Example for AD:       'mail'
```

**LDAP Office/Location Attribute:** -- Enter the LDAP attribute for the Room Number/Office/Location property of your LDAP server. This is specific to the type/brand of LDAP server you are currently using for your directory services.

```
Example for LDAP:      'l' <-- only lowercase!  
Example for AD:       'physicaldeliveryofficename'
```

**LDAP Phone Attribute:** -- Enter the LDAP attribute for the Phone Number property of your LDAP server. This is specific to the type/brand of LDAP server you are currently using for your directory services.

```
Example for LDAP:      'telephone' <-- only lowercase!  
Example for AD:       'telephonenumber'
```

**LDAP Context Attribute:** -- Enter the LDAP attribute for the Context property of your LDAP server. This is specific to the type/brand of LDAP server you are currently using for your directory services.

**NOTE:** *If you are having issues with any password allowing authentication using LDAP (i.e. Novell) other than Active Directory, then you should set this value to 'dn'.*

```
Example for LDAP:      'dn'  
Example for AD:       'sAMAccountName' <-- CASE-SENSITIVE!
```

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## **\* Active Directory Notes \***

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'a working example:'

```
auth_method      = "AD"
ldap_host        = "DomainController.DomainName.com"
ldap_domain      = "DomainName.com"
ldap_binddn      = "Administrator@DomainName.com"
ldap_bindpwd     = "AdminPAssword"
ldap_rootdn      = "CN=users,DC=DomainName,DC=com" (Note: "users" is the
group name)
ldap_searchattr  = "sAMAccountName"
ldap_fname       = "givenname"
ldap_lname       = "sn"
ldap_uname       = "samaccountname"
ldap_email_add   = "mail"
ldap_office      = "physicaldeliveryofficename"
ldap_phone       = "telephonenumber"
ldap_context     = "sAMAccountName"
```

\* Note that `ldap_binddn`, is defined as `UserName@DomainName.com` above.  
\* For the rootdn of `'username@domainname.com'`, you might need to set the following options *prior* to `ldap_bind()` in `common/common.php` in the `checkUserLDAP()` function (~line 155 in version 1.6.5.3 as pointed out by `t0a5t` in <http://oneorzero.com/smforum/index.php?topic=4089.0>):

```
    ldap_set_option($ldapconn, LDAP_OPT_PROTOCOL_VERSION, 3);
    ldap_set_option($ldapconn, LDAP_OPT_REFERRALS, 0);
```

**Helpful Links:** -- *Most issues people have are usually a result of either entering the wrong syntax for the LDAP Attributes or not fully understanding how LDAP works and the limitations that it has. Below are some helpful links/posts that may help you with any problems you may have getting this feature to work in your environment. Please read, thoroughly, the following posts/discussions prior to posting support requests in the support forums.* -- Thanks, Brilliant!

Original LDAP mod discussion thread -- [\[Files/Hacks for adding LDAP to v1.6 \(Managed through Control Panel\) by Brilliant\]](#)

Correct setting for this mod -- [\[Windows 2003 LDAP probs\]](#)

# Check For OneOrZero Updates

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The OneOrZero updates pages displays the following information:

- Installed OneOrZero version number
- Latest OneOrZero version number
- Links to latest release notes, download page and mailing list for updates
- Latest news from OneOrZero regarding the application (such as update alerts etc)

It is important to review this page regularly as critical releases and important information is readily available.

## Inbound Email - MailGate

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### Description

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mailGate.php serves as an email gateway for the OneOrZero Helpdesk.

It allows users to create new tasks by sending emails to a designated email address. Mailgate collects the email, either via an input stream or pop3 server connection, and creates a task from the email.

Email attachments are added as task attachments, and tasks can be routed to specific task managers based on email subject content (read the routing section below).

### Requirements

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mimeDecode.php - [http://download.pear.php.net/package/Mail\\_mimeDecode-1.5.0.tgz](http://download.pear.php.net/package/Mail_mimeDecode-1.5.0.tgz)

Mail\_Mime PEAR extensions - PEAR is a collection of add on features for PHP - <http://pear.php.net>

## Configuration Requirements:

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The OneOrZero attachments directory must be writeable user running the mailgate.php file (this may be a scheduled job or the mail program). This is necessary for the automatic uploading of email attachments into the tasks created by the mail gateway.

Task Manager and Administrator paging (notification emails) will not work unless a pager email address is specified in the OneOrZero User Profiles.

## Configuration

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Configuration tasks are completed both from within the OneOrZero Settings page of the Control Panel, and standard system administration practices. This tutorial is assuming the use of Cron as a scheduling daemon, and Sendmail as the MTA, on a \*nix system.

Please ignore the obsolete {OneOrZero\_DIR}/mailgate/instructions.txt, check the {OneOrZero\_DIR}/mailgate/mailGate.php instead and this page.

All configuration options are set in the OneOrZero control panel, except the set-up of the aliases in step 1.

Note, make sure your php.ini file has error\_reporting set to the required error reporting level as per specified in the OneOrZero Install and Upgrade Manual.

## Features and Options

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### ***1. Collection of email from either an input stream (ie. Sendmail) or a POP3 server***

(Unix/Linux Only) To collect email via an inbound sendmail stream, first set the 'Input Method' to 'Stream' in the OneOrZero control panel. Second alter the aliases (normally kept in /etc/mail/aliases when using Sendmail) file to look like the following...

```
helpdesk: "|php /path/to/mailGate.php"
```

Note, the pipe symbol ("|") tells sendmail to redirect the message to the program listed. In this case, sendmail is sending the message to the php processor, which will run mailGate.php.

(Unix/Linux/Windows) To collect email by downloading it from a POP3 server, set the 'Input Method' to 'POP3' in the OneOrZero control panel. Setup a scheduled job to collect emails via cron (Linux) or a scheduled task (Windows).

To setup a download every 5 minutes, using the unix scheduler cron, make changes to the /etc/crontab file, enter the following...

```
* /5 * * * * root php /path/to/mailgate/mailGate.php
```

This will run as the user root (not normally a good thing but guaranteed to work), and will execute php to process mailGate.php.

Using a batch file in windows and having this executed via a scheduled task will achieve the same functionality. An example batch file is:

```
/path/to/php.exe path/to/mailgate/mailGate.php 2. Choose whether to page assigned task managers, administrators, or the entire task manager group when tasks are updated or created
```

The options are available to selectively choose who gets paged by setting whether to page all task managers, only the assigned task managers, or just the administrators. You may also set any combination of those three.

When set to page 'All Task Managers,' every task manager defined in OneOrZero will get an email alert, assuming they have the 'Pager Email' defined in their user properties.

When set to page 'Assigned Task Managers' only the task manager assigned to the task will get the email, again assuming they have the 'Pager Email' defined in their user properties.

When set to page 'Administrators,' regardless of the other two settings, all users defined as administrators will get a page email as well. Once again, assuming the 'Pager Email' is defined in their user properties.

### ***3. Choose whether to auto fill user fields, such as office and phone, from the user database***

If turned on, via the Control Panel, and appropriate data is available, the task will be populated with relevant information when it's created.

#### ***4. Automatic routing of tasks to task managers based on the email subject***

This operation is performed by querying the properties of the individual task managers user profile, in specific their 'Routing' field value. For example: to assign all 'Blue' related tasks to Bob (with the email subject containing the word 'Blue'), add the following value to the 'Routing' field in the user properties: **Blue**

You can match against multiple subject words by seperating the routing values with a pipe (|). For example: **Blue|Red|Yellow|Black**

Note the match is case in-sensitive

#### ***5. Text only task descriptions, even from html multipart messages***

Note - If the email client is configured to send HTML only email, no suitable description will be gathered and the script will indicate that no suitable message was found in the body of the ticket.

#### ***6. Email attachments are saved as task attachments***

#### ***7. Customisable receipt and supporter page templates***

To set up email templates, create/modify the following templates using the Templates page of the OneOrZero Control Panel.

mailGate\_new\_page page sent to supporters and admins for new tickets

mailGate\_update\_page page sent to supporters and admins for ticket updates

mailGate\_new\_receipt receipt sent to user for new tickets mailGate\_update\_receipt receipt sent to user for ticket updates

#### ***8. Receipts may be disabled completely by setting the option to 'Off' in the Control Panel***

#### ***9. Customizable check list reminders (experimental)***

Some teams have repeatable routines that happen regularly or infrequently. If a bullet list of tasks must be followed, mailGate will send out designated emails to the users.

To set up check-lists for certain tasks, enter values in the OneOrZero control panel setting 'Enter Checklist selection string'. These values are keywords separated by a pipe (|) symbol.

Then create email message templates using the keyword as part of the name. For example, to create a check-list for new hires... Keyword: newhire template:  
mailGate\_newhire\_checklist