

Click 'Admin Panel' > 'Staff' > 'Staff Members'

- Staff Members are the support personnel who attend to tickets submitted by users. In addition to attending to tickets, staff can also create new tickets on behalf of users. Staff may also be referred to as 'agents' in Service Desk
- You can only add new staff members through the ITarian interface. Login to ITarian > click 'Management' > 'Staff'
- Service Desk imports staff with the same role they have in ITarian. The role determines their permissions in Service Desk. You can also create custom roles in if required.
- New staff are assigned to the 'default' [Service Desk](#) department. You can set the default department at 'Admin Panel' > 'Settings' > 'System'. You can create new departments and assign staff to different departments as required.

Use the links below to jump to the section you need help with:

- [The staff interface](#)
- [Update staff details, role and department](#)
- [Reset a staff member's role](#)
- [Further reading](#)

The staff interface

- Login to ITarian
- Click 'Applications' > 'Service Desk'
- Open the admin panel (See the last link on the left)
- Click 'Staff' > 'Staff Members'

The screenshot displays the 'Staff Members' page in the Service Desk interface. The breadcrumb trail at the top reads 'Service Desk > Staff > Staff Members'. The page title is 'Staff Members'. There are two dropdown menus for filtering: '- All Departments -' and '- All Roles -', followed by an 'Apply' button. A 'Role Reset' button is also visible. A 'Show 25 records' dropdown is present. The main content is a table with the following columns: NAME, USERNAME, STATUS, ROLE, PORTAL ROLE, DEPARTMENT, CREATED, and LAST LOGIN. The table contains four rows of staff members. The 'Steam Ship' row is highlighted. The table footer shows pagination: '<< Prev', '1', and 'Next >>'. The left sidebar contains a navigation menu with categories: DASHBOARD, SETTINGS, MANAGE, EMAILS, TIME SHEETS, STAFF (expanded), ANNOUNCEMENTS, REPORTS, FINANCE, and STAFF PANEL. The 'STAFF' category is expanded to show 'Staff Members', 'Roles', 'Departments', 'Timesheet Templates', and 'Material Approval'.

| <input type="checkbox"/> | NAME | USERNAME | STATUS | ROLE | PORTAL ROLE | DEPARTMENT | CREATED | LAST LOGIN |
|-------------------------------------|-----------------|-------------------------------|--------|---------------|---------------|----------------------------|---------------------|---------------------|
| <input type="checkbox"/> | herculespopular | herculespopular22@gmail.com | Active | Account Admin | Account Admin | Support | 05/21/2018 10:09 am | 02/13/2020 11:13 am |
| <input checked="" type="checkbox"/> | Steam Ship | ssgalia@yahoo.com | Active | Technician | Technician | System Default - (Support) | 03/04/2019 9:44 am | 03/04/2019 1:19 pm |
| <input type="checkbox"/> | John Grey | john22grey@yopmail.com | Active | Technician | Technician | System Default - (Support) | 10/15/2019 12:43 pm | |
| <input type="checkbox"/> | Amir | fsregionaltransport@gmail.com | Active | Technician | Technician | System Default - (Support) | 02/11/2020 10:38 am | 02/11/2020 10:40 am |

- **Name:** The full name of the staff member.

Click the name to open the 'Update Staff' screen. The screen lets you view and edit staff details, and change their role and department. See [Update details, role and department of staff](#) for more information.

- **User Name:** The name the staff member uses to login to Service Desk.
- **Status:** Active - Can log in and access Service Desk. Locked – Cannot log in to Service Desk.
- **Role:** The role determines the Service Desk permissions for the staff member. You can change a staff member's role in the 'Update Staff' dialogue. See [Update details, role and department of staff](#) for help to change the role for a staff
 - See [this wiki](#) if you want more information on roles.
- **Portal Role:** The role assigned to the staff member in the ITarian Portal. There are three default roles in ITarian that are not editable - 'Account Admin', 'Admin', and 'Technician'.

You can create a custom role by cloning a default role then editing its permissions. If a staff member has a custom role then the portal role column shows the default role from which it was created.

- **Department:** The Service Desk department to which the staff member belongs. Click the staff member's name to change the department. See [Update details, role and department of staff](#) if you need more help.
- **Created:** The date at which the staff member was added to ITarian.
- **Last Login:** The date and time the staff member most recently logged into Service Desk.

Update staff details, role and department

You can view and edit the staff member's phone number, department and role. You can also edit the signature appended to outgoing mails from the staff member.

- Open the admin panel (see the last link on the left)
- Click 'Staff' > 'Staff Members'
- Click the name of the staff member.



User Name - The name the staff member uses to log into ITarian and Service Desk

Staff Name - The full name of the staff member

Email Address - The email address of the staff member

Note: You cannot edit the username or email address from here. Account admins can edit the staff name in the ITarian interface at 'Management' > 'Staff'.

Role – The role determines the staff member's privileges in Service Desk. There are two ways you can

approach roles:

1) **Use the ITarian roles** - Login to ITarian > click 'Management' > 'Roles'.

All roles created in ITarian are automatically mirrored in Service Desk. You can clone a default ITarian role and modify its permissions to create a custom role. ITarian roles are also cascaded to other modules such as Endpoint Manager and CRM.

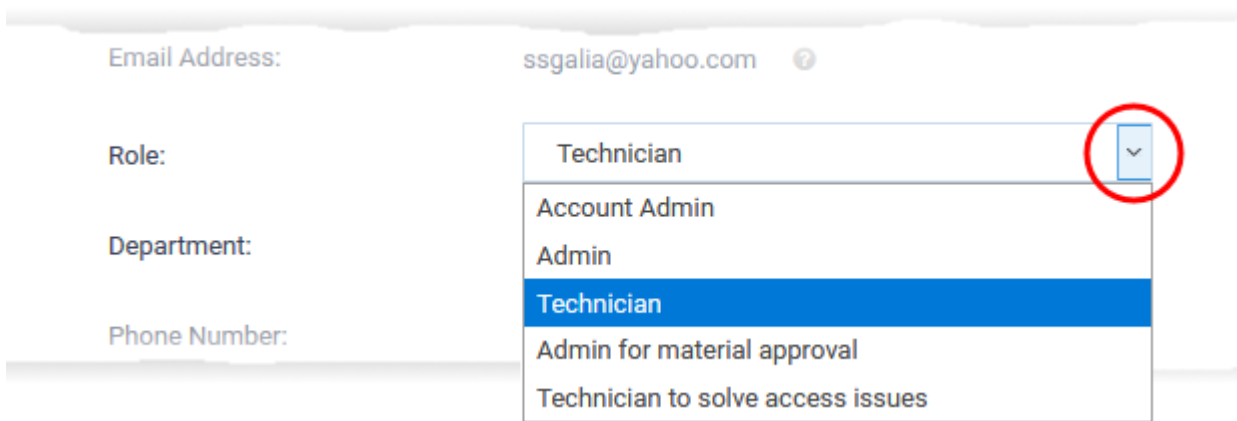
2) **Create roles in Service Desk** - Open Service Desk > click 'Admin Panel' > 'Staff' > 'Roles'

Roles you create in Service Desk are exclusive to the application. They are not mirrored in other ITarian modules like Endpoint Manager or CRM.

Staff imported from ITarian inherit the role they have in ITarian. You can change this role in the Service Desk interface at any time.

- See [this wiki](#) if you want to read more about adding and managing roles.

Select a role for the staff member from the drop-down:



Email Address: ssgalia@yahoo.com

Role: Technician

Department:

Phone Number:

- Account Admin
- Admin
- Technician
- Admin for material approval
- Technician to solve access issues

Department - The internal department to which the staff member belongs. New staff are auto-assigned to the Service Desk 'Default' department. You can view and change the default department at 'Admin Panel' > 'Settings' > 'System'.

Service Desk ships with three basic departments:

- Support
- Sales
- Maintenance

Click 'Admin Panel' > 'Staff' > 'Departments' to create new departments.

Select a department you want to assign to the staff member from the drop-down:



Phone Number: Enter the contact number and extension for the staff member.

Mobile Number: Enter the cell phone number of the staff member

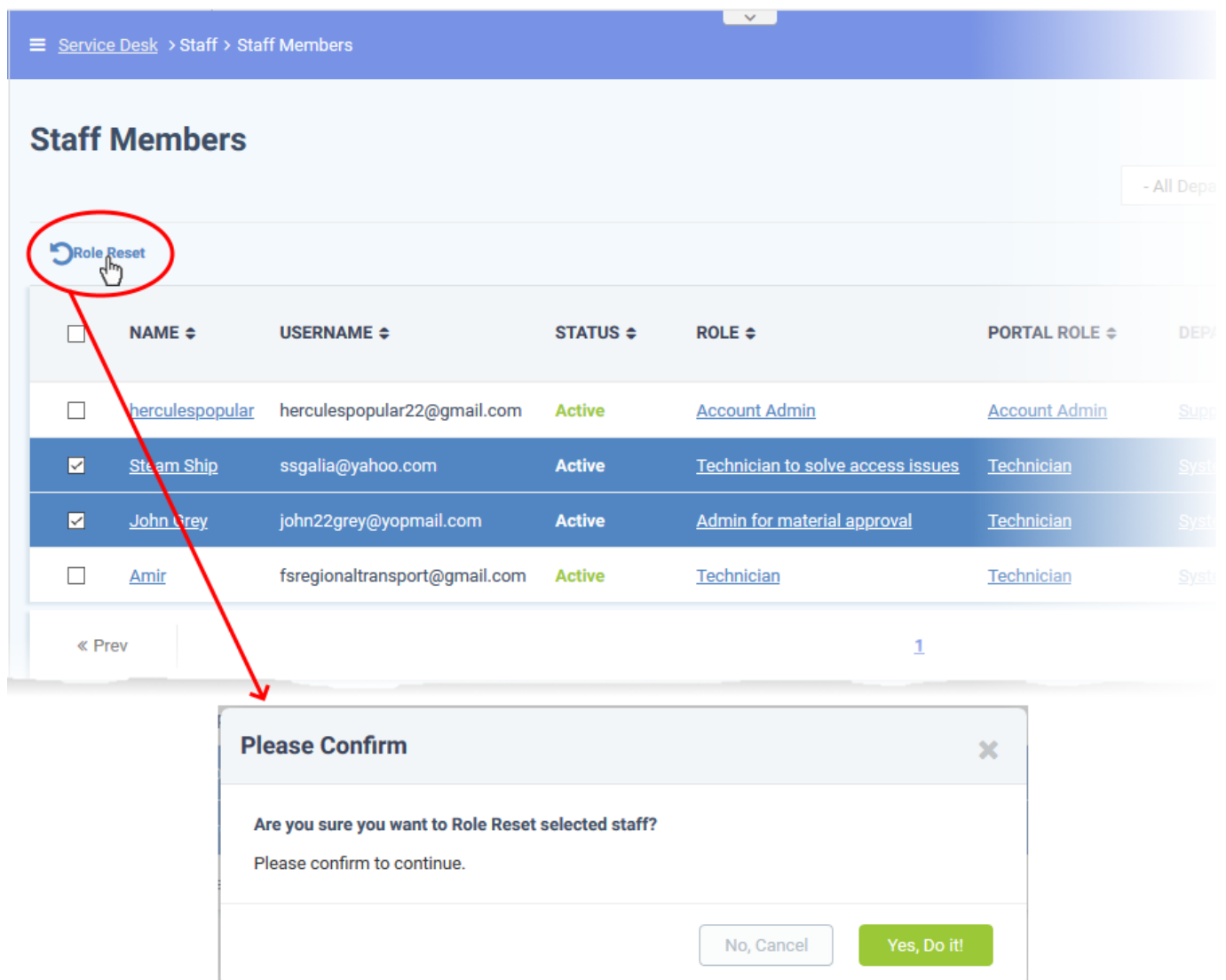
Staff Signature: This text is appended to all outgoing mails from staff to customers. It can include, for example, company contact details, disclaimers or 'About us' information.

Click 'Save Changes' to update the staff member's details.

Reset a staff member's role

Resetting a staff member's role reverts it to their original ITarian role.

- Open the admin panel (see the last link on the left)
- Click 'Staff' > 'Staff Members'
- Select the target staff
- Click 'Role Reset' at the top left.



The screenshot shows the 'Staff Members' page in a service desk system. The breadcrumb navigation is 'Service Desk > Staff > Staff Members'. The page title is 'Staff Members' and there is a filter '- All Depa'. A 'Role Reset' button is circled in red. Below it is a table of staff members with columns: NAME, USERNAME, STATUS, ROLE, PORTAL ROLE, and DEPA. The table has 5 rows. The first row is 'herculespopular' with role 'Account Admin'. The second row is 'Steam Ship' with role 'Technician to solve access issues'. The third row is 'John Grey' with role 'Admin for material approval'. The fourth row is 'Amir' with role 'Technician'. A red arrow points from the 'Role Reset' button to a confirmation dialog box. The dialog box has a title 'Please Confirm' and a close button. The text inside says 'Are you sure you want to Role Reset selected staff?' and 'Please confirm to continue.' There are two buttons: 'No, Cancel' and 'Yes, Do it!'.

| | NAME | USERNAME | STATUS | ROLE | PORTAL ROLE | DEPA |
|-------------------------------------|-----------------|-------------------------------|--------|-----------------------------------|---------------|-------|
| <input type="checkbox"/> | herculespopular | herculespopular22@gmail.com | Active | Account Admin | Account Admin | Supp |
| <input checked="" type="checkbox"/> | Steam Ship | ssgalia@yahoo.com | Active | Technician to solve access issues | Technician | Syste |
| <input checked="" type="checkbox"/> | John Grey | john22grey@yopmail.com | Active | Admin for material approval | Technician | Syste |
| <input type="checkbox"/> | Amir | fsregionaltransport@gmail.com | Active | Technician | Technician | Syste |

- Click 'Yes, Do it !' in the confirmation dialogue

Further reading:

- Add staff – See ['Manage Admins and Staff'](#)
- Service Desk staff roles – See ['How to manage staff roles in Service Desk'](#)
- Service Desk system settings - See ['How to manage Service Desk settings and preferences'](#).