Managing Operators

Operators represent staff accounts. You can adjust an operator's permission by assigning them to an operator group.

Searching for Operators

Table Sorting

By default the table is sorted alphabetically by the operator name. Once the table has loaded you're able to change the sort column by clicking the up/down arrows:

- Down arrow: descending order
- Up arrow: ascending order

Filtering the Table

It's possible to filter operator based on their name, email and the groups they belong to:

1. Visit **Users -> Manage Operators** and click "Filter Results".
2. Click "Add Condition" and select whether you would like to search by:
    1. **Operator Full Name** - The name of the operator.
    2. **Operator Email** - The email address of the operator
    3. **Operator Group** - A group that the operator belongs to

    Note that conditions are combined, for example it is not possible to search for "joe.bloggs@googlemail.com" OR "michael@googlemail.com"
3. Click "Update" and the table will be filtered appropriately.

Creating or Updating an Operator

1. Visit **Users -> Manage Operators**. If you're creating a new operator click "Add Operator", or if you're updating an existing operator, find the operator and click the edit (pencil) icon on the

right side of the table row.

2. Complete the form fields:

User Details

    1. **First name**
    2. **Last name**
    3. **Email** - The unique email address for the operator which they will use to login to help desk and receive notifications.
    4. **Password**
    5. **Confirm Password**
    6. **Phone Numbers**
    7. **Country**
    8. **Language** - The language the operator prefers to use. The help desk will then be configured to show text in that particular language for the operator.
    9. **Timezone** - The timezone the operator exists in is used to ensure timestamps displayed in the help desk are displayed correctly for that user.
    10. **Avatar** - A public image which will be sent in all e-mail and web-based ticket correspondence.
    11. **Groups** - All operators belong to one or more groups. Operators inherit the permissions assigned to groups, and govern what they can access within the help desk.
    12. **Account Active** - Marking an operator account as in-active, prevents them for logging into the help desk.

Operator Settings

    1. **Departments** - Operators can be assigned to zero or more departments. This setting governs which tickets an operator can view and respond to - based on which department they're opened in.
    2. **Signature** - The operator signature is appended to all ticket based correspondence performed via the web interface.
    3. **Email Notifications** - It is possible to control which types of e-mail notification you prefer to be sent.

3. Click "Submit" to save, and send the operator their new account details. It is recommended they change their password upon logging in.

Deleting an Operator

Deleting an operator is an irreversible action as it cannot be restored. The following data created by the operator will also be permanently removed: internal tickets, private messages and self-service comments. All other data will remain in the system such as ticket messages and articles created by the operator.

If you prefer to not to permanently remove the content associated with an operator we highly recommend that you simply suspend an operator by making their account as in-active (see [redacted]). In-active operator accounts are prevented from logging into the help desk but ensure any data they have created remains intact.

To delete an operator, follow the below steps:

1. Visit **Users -> Manage Operators**.
2. Find the operator you would like to delete in the table (see [redacted]).
3. Click the delete icon located on the right of the table.
4. Click on the left button, "Yes, Delete Operator", that pops up confirming you would like to delete this operator, along with the related data shown, and they will now be deleted.