

HELP!Desk User Manual

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Introduction

This section will introduce you to the features of HELP!Desk for Windows. It briefly describes the program functions and relates them to actual support center activity. Each component of the system is described in detail in later sections.

Introduction

HELP!Desk for Windows is designed to make customer service and technical support as efficient as possible. It enables a support analyst to profile clients and to streamline the support process. It also permits history of prior service, inventory, training, and other useful information to be displayed while working with a caller. The main features of the system are described below.

Call Logging



All calls to the help desk may be recorded for future reference and follow-up. Each call may be linked directly to a client or it may be entered without association to a particular client or company. When a call is taken, an analyst may enter the call and then link it to a client, or the client may be located first which allows the call to automatically linked. Calls are automatically timed to assist with billing and reporting.



Each call may contain an unlimited number of activities to track the steps taken to close a call. If multiple technicians work on the problem, the activities feature enables you to accurately track each technician's time to respond to the call assignment and the total time spent on resolving the issue.



Each call may be referred to departments or groups outside the Help Desk area. This enables Customer Service, Training, Quality Assurance and other departmental personnel to become aware of customer issues they need to address.

Complete client histories and inventories may be viewed by the analyst while call information is being entered. Call categories, priorities and other classification information is added after the problem description is entered.

Client Profiles



Client profiles may be maintained for all customers. Location and accounting information are included with support contract data. This information can be retrieved before or after entering call information. The note feature allows analysts to communicate with one another and share pertinent information about satisfying particular customers. New to this section is the ability to track an unlimited number of telephone numbers and e-mail addresses.

Problem-Solving Knowledge Base



Past calls may be searched by key words to help determine solutions to current problems. This means everything learned by solving one client's problems can be shared with all other analysts. Utilizing this feature makes it easier to bring new staff onboard and give them an information resource and additional confidence in their answers. This module also includes an integrated graphics file viewer which allows you to pop-up any technical diagrams, scanned images and captured screens that you have on file.

Inventory



Both hardware and software inventories are maintained by configuration for each Client. Equipment and software records may be accessed at any time during a support call. Warranty and service contract expiration dates are also tracked and reported. House inventory allows you to track all spare systems and parts and assign components to clients quickly. For convenience, inventory selection tables are generated during the normal data entry process. These tables allow multiple entries of items to be entered accurately. Inventory information may also be imported directly from Tally Systems' NetCensus.

Notifications and Ticklers



The table driven notification and tickler features allow an analyst to set automatic reminders. Notifications can be sent to other departments or groups to alert them to special situations. With these features training issues calls can be brought to the attention of the training department, the Quality Assurance group will be made aware of quality concerns, and maintenance may be told about an office equipment problems. Ticklers can also be set to remind you of calls that need to be followed-up on, or notify you when you have a new call waiting.

One button selection capability permits an analyst to review multiple training schedules and to send referral messages to appropriate groups. Notifications to other departments or groups disseminates information from the help desk to the affected areas rapidly.

Bulletin Board



Bulletins are optionally displayed on the initial screen. They provide a timely means of communicating within the department. HELP!Desk offers the capability of storing multiple bulletins and even allows some to be modified by all analysts. The bulletin then becomes a real time forum for the discussion of ideas and techniques at the support center.

Vendor / Dealer

The system maintains a vender list that can be used to make vendor / dealer recommendations to a caller, as well as track all purchases from a dealer.

Customer Satisfaction Survey Reporting



Organizations that perform surveys or evaluate call performance can store responses and generate reports to identify good service techniques and to identify areas in need of improvement. Survey results enable analysts to adjust their techniques to satisfy a wide range of customers.

Reporting



ENHANCED A wide range of pre-defined reports and the ability to customize reports provides an effective means to measure progress and performance. All reports can be displayed on the screen or directed to a printer. Reports cover all call activities, surveys, inventory, solutions, profiles, etc.

Security



Access to all major functions of HELP!Desk can be controlled through security. System access is limited to those that have been given authorization through passwords. Multiple permission levels make it possible to limit the availability of information to everyone using the system. Field level editing may also be controlled ranging from required field edits to no validation at all. This feature also makes it possible to control the process of updating tables "on the fly."

Help

System help is available at any time. Help is geared towards explaining particular features in the context of efficient operation of the support center.

Customized Field Labels and Buttons



Field labels may be modified to facilitate recording and maintaining information that is specific to your organization. This capability also makes it possible to display screens in different languages. Groups that provide support for activities and products that are not specifically computer related can tailor descriptions to reflect their product lines and services. You may choose to allow each HELP!Desk user to customize his or her own field labels, which can be useful to organizations providing international or multilingual support.

Network Messaging on Novell



On Novell networks, you can automatically inform technicians when a call has been assigned to them. Using a hot-key, messages can be sent to anyone on the system. Conferencing option allows groups of people to communicate effectively.

Pop-Up Calendar



Any date field can be filled by selecting a day from the pop-up calendar.

Network Support

HELP!Desk is a multiuser application supporting "intelligent" record locking. There are no limitations on the number of simultaneous users accessing the system.

System Requirements

HELP!Desk is intended for use on local area networks, but may be installed on a single-user computer if desired.

	Minimum Requirements
IBM Compatible Computer	Pentium-133
Monitor	SVGA
Operating System	Win95/98/NT/2000/XP
Mouse	Yes
Memory	128MB
Local Area Network	NetWare / NT (required for multiuser access)
Disk Space	50MB workstation 75MB server
Internet Access	Recommended (required to download product updates)

Starting HELP!Desk for Windows

Click Start, Programs, HELP!Desk for Windows, then click HELP!Desk.

You will be prompted to enter a log-in name and password. The System Administrator should have created a log-in name and password for you. If so, enter that information.

HELP!Desk ships with a default log-in name of HD, with a password that is also HD.

Basic Notes and Definitions

Terminology

User refers to the person (normally a technician) who uses the HELP!Desk software.

A **Client** is a person being supported by the help desk, whether an external customer or an internal employee.

The **HELP!Desk Administrator** or **Supervisor** is the person responsible for the installation and setup of HELP!Desk. Specifically included in the Administrator's tasks is the assignment of security levels to each user.

The terms **linked** and **unlinked** refer to calls, hardware and software and the relationship they have to a client record. Linked items "belong" to a particular client. Items in house inventory by definition do not belong to any single individual, and thus are unlinked. A house inventory item becomes linked when it is assigned to a client.

All data is retrieved into a **retrieval set**. A retrieval set is a group of database records that meet a certain selection criteria. For example, if you search for clients whose last names begin with "BA", then the records that meet that criteria form a retrieval set. Operations like **Next** and **Previous** work only on the records in the current retrieval set.

General

Menu selections can be made by either pressing the first character of the option you desire or by pressing the arrow keys until the option you want is highlighted and then pressing *Enter*. You can also choose an option by highlighting it with the mouse cursor and clicking the left button. The <u>underlined character in a menu option is indicative of that option's accelerator key</u>.

The symbol "<" in a menu indicates that another menu will be displayed if this option is selected.

The *Escape* key will cancel any function in progress. Pressing *Escape* will yield the same result as selecting *Exit* or *Cancel*.

During data entry, *Tab* will take you to the next field or button. *Shift-Tab* moves you to the previous field or button. The *Left* and *Right* arrow keys, *Insert*, *Delete* and *BackSpace* can be used to edit the current field. The *Up* and *Down* Arrow keys will scroll through table selections if the field has a drop down list box (indicated by).

To search for solutions, press Ctrl-T or click the Solutions button on the tool bar.

You can save typing during data entry by clicking the drop down symbol () to select from a list. You can move to the first item beginning with a specific letter by typing the letter. You can use the mouse or *Up* and *Down* arrows to move through the list. To choose an item, either highlight it

and press *Enter* or click on it with the left mouse button. Security settings control whether the user's entry must exist in the list or if the user can type something else and optionally add it to the list.

Technician: GRANT

For date fields, you can click the calendar button to pop up the calendar, then double-click on a

date to fill in the field. Right-click or press <Escape> to close the calendar window without selecting a date.

When: 03/16/2000 1

•	h	March 2000						
Su	Мо	Tu	We	Th	Fr	Sa		
			1	2	3	4		
5	6	7	8	9	10	11		
12	13	14	15	16	17	18		
19	20	21	22	23	24	25		
26	27	28	29	30	31			

Memo fields, used for comments and descriptions of call problems and resolutions, allow entry of up to 64K of formatted text. Word wrapping is fully supported in these fields.

General Button Descriptions

Many windows share a subset of buttons that work similarly throughout HELP!Desk. They are described below.

Add	Click the Add button to add information. Depending on the window this button appears on, you will either add the new information into the current window, or another window will open to accept your input.
<u>E</u> dit	Click the Edit button to make changes to existing data. In selection windows, the Edit button allows you to change the currently highlighted element.
<u>D</u> elete	The Delete button is used to delete the current record. A dialog box will be displayed prompting you to confirm your command.
<u>H</u> elp	The Help button accesses the help system. Depending on the window you are in, Help will either display information regarding the current window or the help system table of contents.
E <u>x</u> it	Click Exit to close the current window. Depending on your HDWIN.INI settings, the Client and Call windows may minimize when the Exit button is clicked.
<u>S</u> ave	The Save button is used to store the changes made when adding or editing information.
<u>C</u> ancel	Click Cancel to abandon all changes that were made in add or edit mode. If data was changed (either by you or automatically by HELP!Desk, you will be prompted to confirm your decision to lose the changes.

Global and Personal Preferences

Depending on rights granted by the Administrator, field and button labels and program defaults can be configured globally or on a per-user basis. These settings are accessed through **Preferences** on the **File** menu.

Printer setup can be accomplished by selecting the option from the **File** menu. If you have **Supervisor** access to HELP!Desk, you can set the report headings by choosing **Headings** from the **File** menu.

You can save the positions and sizes of all open windows by selecting **Save Window Position** from the **File** menu. Conversely, **Restore Window Positions** will retrieve the last saved settings for all windows in the system.

Quick Reference Guide

This section gives an overview of the HELP!Desk menu structure and shortcut keys.

File Edit Client Call Inventory Communications Reports Utilities Window Help

File		
Printer Setup	printer.	Printer Setup allows you to select and configure your
Print P <u>r</u> eferences ► <u>H</u> eadings	princer	Print or will print the contents of the current window.
<u>S</u> ave Window Position <u>R</u> estore Window Position E <u>x</u> it		Preferences allow you to change field labels and button text, and also edit the program default settings that affect which windows appear at startup, confirmations, date formats, field colors, etc.

Headings is used to change the three line heading that appears on all reports.

Save Window Position is used to save the positions and sizes of any windows that are currently open in HELP!Desk.

Restore Window Position will set each window back to its last saved position and size.

Exit will close the application.

Edit

<u>C</u> ut	Ctrl+X
Сору	Ctrl+C
<u>P</u> aste	Ctrl+V
<u>D</u> ate Stamp	F9

Cut or **Ctrl-X** is used to move the highlighted text from HELP!Desk to the Windows Clipboard.

Copy or Ctrl-C copies the highlighted text to the clipboard.

Paste or **Ctrl-V** copies text from the clipboard and inserts it at the current cursor location in HELP!Desk.

Date Stamp or **F9** will insert a string consisting of the user name (log-in name) and current date and time into the currently selected field. Its intended use is to date stamp entries in the **problem** and **resolution** fields.

Client



Add is used to add a new client record.

Find or is used to locate a client record. Depending on your preferences and currently open windows, either the **Client** or the **Profile** window will be opened.

Profile or 🦪 🗧

also searches for a client, but always opens the **Profile** window.

Call		_
<u>A</u> dd	Ctrl+A	Add (Ctrl-A or) is used to add a new call. If a client window is
Fi <u>n</u> d		open, the call will automatically be linked to that client.
<u>G</u> oto O <u>p</u> en Li	ist	Find allows you to search for a previously entered call.

Goto allows you to retrieve a call based on its call number (also referred to as work order number).

Open List shows a selection window of all open or pending calls (your own, someone else's, or everyone's).

Inventory



House opens the window of House Hardware or House Software.

Hardware Find or 🗾 allows you to search for any piece of hardware in the system.

Similarly, **Software Find** or allows you to search for any piece of software.

Communications

Network Messaging	Alt+F3
Email	Alt+F2

Network Messaging or **Alt-F3** allows you to send messages to other users on your Novell network.

Email or **Alt-F2** allows you to send mail across MAPIcompliant email systems.

Reports

Client Reports	►
Call Reports	►
Inventory Reports	►
Referral Reporting	
Survey Reporting	

Client Reports opens a submenu listing all available client reports.

Call Reports opens a submenu of call detail, listing and summary reports.

Inventory Reports opens a submenu listing reports for hardware, software and configurations.

Referral Reporting allows access to call referrals.

Survey Reporting allows you to query the call survey module.

Utilities

Solutions	۱.
Pack & Reindex	Ctrl+Alt+F1
Training	Ctrl+T
Bulletin Board	Ctrl+B
Ticklers	
NetCensus® Import	
Table Maintenance	+
Security	

Solutions accesses the solutions module where you can search, create or edit solutions. Both text and graphics are supported in search mode.

Pack & Reindex or Ctrl-Alt-F1 permanently removes deleted records and allows you to reconstruct damaged index files.

Training (Ctrl-T or) is used to create, edit or view training schedules. Use can use this feature to list in-house or company approved training courses.

Bulletin Board (**Ctrl-B** or) lets you create or view bulletins. This module can be used to disseminate information to other members of the technical staff.

Ticklers or are used to remind you or others of important tasks. Some ticklers are generated automatically when calls are added or reassigned. The **HDALERT** program monitors the tickler file and notifies you when a task is due.

NetCensus® Import allows you to import client and inventory data that has been collected using Tally Systems' NetCensus or PC Census products.

Table Maintenance is used to edit the contents of all tables and drop-downs used throughout the system.

Security features control who has access to the program, and the data they can view or edit.

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Menu Reference

This section details each menu option, including submenus, windows, dialog boxes, buttons and options.

File Edit Client Call Inventory Communications Reports Utilities Window He										
	<u>F</u> ile	<u>E</u> dit	Clien <u>t</u>	C <u>a</u> ll	<u>Inventory</u>	Co <u>m</u> munications	<u>R</u> eports	<u>U</u> tilities	<u>W</u> indow	<u>H</u> elp

The FILE Menu

<u>P</u> rinter Setup	
Print	
P <u>r</u> eferences	Þ
<u>H</u> eadings	
Save Window Position	
<u>Restore Window Position</u>	
E <u>×</u> it	

File, Printer Setup

😑 Printer Setup		
<u>P</u> rinter: HP LaserJet III on LPT1:	Ť	OK Cancel
	*	Setup

This is the standard Windows dialog box for printer selection and setup.

File, Print 🞒

This option prints the contents of the current window as a report.

Client Window	Prints client information including notes and all phone numbers and email addresses.
Profile Window	Prints all information for the current client, including entire call history with activities and hardware and software by configuration.
Call Window	Prints a Work Order for the call showing basic client information (if the call is linked), full detail for the current call including activities, and the client's hardware and software (if selected in <i>Preferences</i>).
Configuration Window	Prints hardware and software by configuration for all configurations in the window.
Configuration Hardware Window	Prints all hardware for the current configuration.
Configuration Software Window	Prints all software for the current configuration.
Hardware Search Selection Window	Prints all hardware matching the search criteria, including client name for each piece that is linked.
Software Search Selection Window	Prints all software matching the search criteria, including client name for each piece that is linked.
Client Hardware Window	Prints all hardware for the current client, ordered by "type".

Client Software Window	Prints all software for the current client, ordered by "type".
House Hardware	Prints entire inventory of house hardware (hardware that is not linked to a client) by configuration.
House Software	Prints entire inventory of house software (software that is not linked to a client) by configuration.
Bulletin Selection Window	Prints all bulletins in their entirety.
Bulletin View/Edit Window	Prints the current bulletin.
Training Schedule Selection Window	Prints all training schedules.
Training Schedule View/Edit Window	Prints the current training schedule.
Solutions Window	Prints the currently displayed solution.
Tickler Window	Prints all ticklers for the selected technician.
Hardware Table	Prints the contents of the table in Type, Brand, Model order.
Software Table	Prints the contents of the table in Type, Manufacturer, Product Name order.
Field Tables	Prints the selected table.
Vendor Table	Prints a listing of all vendors.
Service Table	Prints a listing of all service companies.

File, Preferences

This option opens a submenu for Screen Design and Program Defaults.

<u>S</u>creen Design P<u>r</u>ogram Defaults

File, Preferences, Screen Design

		Fiel	d Labe	ls (Person	al - FRAN	IK)	-
	Ädd	<u>E</u> dit	<u>D</u> elet	e <u>H</u> elp	E <u>x</u> it		
							+
I			(General Te	rms		ווו
		C	lient: 🖡	Client			
	Tec	hnician [·]	Title:	Technician			
			Call:	Call			
		(Calls:	Calls			
I		Inven	itory:	Inventory			
I	Configuration: Configuration						
I		Hardv	vare:	Hardware			
		Softv	vare:	Software			
	Hou	ise Inven	itory:	House			
	Sen	vice Cont	tract:	Service Con	tract / SL	A	+
Ŀ	•						•

This option is used to customize the field labels and buttons throughout HELP!Desk. The program supports a global setting as well as personal settings. Security restrictions control whether a user has access to global, personal or both.

The title of the window will display "GLOBAL" or the name of the logged-in user, indicating global or personal settings, respectively. Assuming you have full security privileges in this section, the buttons will work as follows:

If the title says "GLOBAL"	,
ADD	will create a personal record for you, and put you into edit mode.
EDIT	will allow you to edit the global settings.
DELETE	will be disabled. The Global settings may not be deleted.
If the title shows Personal -	Technician Name,
ADD	will be disabled. You can only create one personal record per
	HELP!Desk user.
EDIT	will allow you to edit your personal settings.
DELETE	will delete your personal settings, then display the Global settings.

When in edit mode, note that the window contains a very large, scrollable data entry area. As you tab from one field to the next, the window will scroll automatically as needed. You can also scroll the window manually and click on the field you wish to edit.

Remember...

If personal settings exist for your log-in name, HELP!Desk will use them. If you want to return to using the Global settings, you must delete your personal settings.

File, Preferences, Program Defaults

Preferences (Personal - FRANK)	
Time Format (12/24 Hour)	24 Add + Save + Defete
Display Window (Client / Profile)	ile <u>H</u> elp X <u>C</u> ancel X X X X
Billing Increment (in minutes)10Hourly Billing Rate75.00Number of Work Hours per day8Minimum Charge per Activity10.00Minimum Charge per Call10.00	

These settings allow you to control certain aspects of HELP!Desk as detailed below. The program supports a global setting as well as personal settings. Security restrictions control whether a user has access to global, personal or both.

The title of the window will display "GLOBAL" or the name of the logged-in user, indicating global or personal settings, respectively. Assuming you have full security privileges in this section, the buttons will work as follows: If the title saws "GLOBAL"

f the title says "GLOBAL"	, ,		
ADD	will create a personal record for you, and put you into edit mode.		
EDIT	will allow you to edit the global settings.		
DELETE	will be disabled. The Global settings may not be deleted.		
f the title shows Personal	- Technician Name,		
ADD	will be disabled. You can only create one personal record per		
	HELP!Desk user.		
EDIT	will allow you to edit your personal settings.		
DELETE	will delete your personal settings, then display the Global settings.		
ADD EDIT DELETE If the title shows Personal ADD EDIT DELETE	 will create a personal record for you, and put you into edit mode. will allow you to edit the global settings. will be disabled. The Global settings may not be deleted. <i>Technician Name</i>, will be disabled. You can only create one personal record per HELP!Desk user. will allow you to edit your personal settings. will delete your personal settings, then display the Global settings. 		

Field Heading	Description
Time Format	Choose 12 or 24 hour formats for default entry in time fields.
Date Format	Select the format for display and entry of dates.
Display Color	This color is used as the background for data that is being viewed.
Edit Color	The background color for data that is being edited.
Display Window (Client/Profile)	This selection controls which window is opened by default when you Find a client. The Client window shows client name, company, address, etc. The Profile window summarizes the client information, and also includes call history and inventory.
Show Inventory on Work Orders	If checked, the client's inventory information will print on the work order. Work orders are generated by selecting Print when the Call window has focus.
Show Activities on Work Orders	If checked, all Activities associated with the call will be printed on the work order.
Display Open Calls window upon startup	If checked, a selection window of your open calls will be displayed immediately after you log-in. If you have no open calls, the window will not open, regardless of the setting.
Display the System Bulletin window upon startup	If checked, the System Bulletin will be displayed after you log in. The system bulletin is the first record in the bulletin selection window that has a subject beginning with "**" (double-asterisk).
Notification if Alert (Tickler) program is not running	HDALERT must be running if you want to receive notification when ticklers come due. If this box is checked, HELP!Desk will notify you if the Alert program is not running, and start it for you if you so choose.
Enable Program Sounds	If checked, certain warning messages will be accompanied by an audible tone.
Default for "Add call to Solutions database"	This value will be used as a default whenever a new call is added. Call information should be added to the Solutions database whenever the resolution contains a solution that might be beneficial to other technicians in the future.
Billing Increment (in minutes)	This value sets the time increment that will be used when call charges are computed. The time is always rounded up to the next multiple of this value in the charge computation.

Hourly Billing Rate	This is the default billing rate that is used in computing charges.
Number of Work Hours per day	This value is used in converting duration entered as days (i.e. 2D) into minutes.
Minimum Charge per Activity	This value is used as the minimum charge for each activity record that is entered.
Minimum Charge per Call	This is the minimum value that will be entered into the charges field in a call when it is closed.

File, Headings

	Report Headings	
Headings:	Coastal Technologies	Edit
	End-User Support Center	
		E <u>x</u> it

These headings are printed at the top of each HELP!Desk report. Only the **Supervisor** can modify the report headings.

File, Save Window Position

This option will save the size and position of each window that is open. This enables you to customize the layout of your HELP!Desk workspace to best suit your needs.

File, Restore Window Position

This option resets each window (whether open or not) to its last saved position and size.

File, Exit 🂵

This option will close the HELP!Desk application

The EDIT Menu

<u>C</u> ut	Ctrl+X
Сору	Ctrl+C
<u>P</u> aste	Ctrl+V
<u>D</u> ate Stamp	F9

Edit, Cut (Ctrl-X)

This option will copy any highlighted text to the Windows clipboard and delete the text from HELP!Desk.

Edit, Copy (Ctrl-C)

This option will copy any highlighted text to the Windows clipboard.

Edit, Paste (Ctrl-V)

This option will paste text from the Windows clipboard into the current field in HELP!Desk.

Edit, Date Stamp (F9)

This option will insert a date stamp string at the current cursor location. Its intended use is to stamp entries in the call **problem** and **resolution** fields. The format of the date stamp is as follows: < current-date current-time username >

The CLIENT	Menu
<u>A</u> dd	
Fi <u>n</u> d	
Pro <u>f</u> ile	

Client, Add

Add is used to add a new client record. When this option is selected, the **Client Window** will open, allowing you to add the new client information.

•		Adding Client		▼ ▲
Name: Title: Company:	<last name=""> <f< th=""><th>irst name></th><th>Client Type: 👱 Emp #:</th><th>Add Save Save/Esit Mext Previous</th></f<></last>	irst name>	Client Type: 👱 Emp #:	Add Save Save/Esit Mext Previous
Phone #: Dept:	Ext	: Group:	<u>.</u>	80445 E-888
Acct #: Asset Tag:		Service Contract:	ontract / SLA:	Pagae #'s Cags Config.
Loc Code:		Contr. Exp: 00	/00/00 🔲 O Date	Hailiware Sottware Help
Priority: Address:		Min Charge:	.00	<u>C</u> ancel
Address 2: City:				
State: Country:	Zip Code:			
Bidg: Floor:	Zone:			
		1 of 1		

Field Descriptions

Default Field Label	Description
Name	Client's last name followed by first name.
Client Type	The client type. Valid entries are I for internal clients, E for external clients. This field affects how information is displayed and reported, so it must be filled with "I" or "E".
Title	Job title.
Emp #	Employee number. This is an informational field and not used for searches.

Company	Company or organization name.
Phone #, Ext	Primary telephone number and extension
Dept	Department. This field has an associated table for data validation.
Group	Group. This field has an associated table for data validation.
Acct #	Account number. This field can be used to sort and filter reports, so it is important to make an entry in this field. The drop-down list contains table entries for validating data.
Asset Tag	The value in this field is used as a default for the asset tag of all hardware entered for this client. This field can also be used to search for a client.
Loc Code	Location code. This field has an associated table for data validation.
Invc. Code	Type of invoice the client receives. This field has an associated table for data validation.
Priority	The value of this field is used as a default priority for all calls entered for this client. This field has an associated table for data validation.
Contract	The type of support contract this client maintains. This field has an associated table for data validation.
Contr. Exp	When the contract expires. If the Date radio button is selected, then enter the date the contract expires. If Minutes is selected, then enter the number of support minutes remaining before the contract expires. This number will be decremented appropriately for each call logged to this client.
Min Charge	The minimum charge that will be computed for each call logged to this client.
Address and Address 2	Mailing address (two lines).
City	City.
State	State or Province.
Zip Code	Zip or Postal Code.
Country	Country.
Bldg	Building. This field has an associated table for data validation.
Zone	Zone (for internal addressing).
Floor	Floor.
Office	Office room number.

Button Descriptions - Add / Edit Mode

Default Button Label	Description
<u>S</u> ave	Saves the current client record. The client window remains open.
Save/Exit	Saves the client information and closes (or minimizes) the client window.
<u>H</u> elp	Opens the Help window.
<u>C</u> ancel	Cancels the current add / edit.

The client window can be set to minimize or close upon exiting the window. The change can be made by editing **HDWIN.INI** as follows: [ClientWindow] Exit=**minimize** or **close**

Client, Find...

Use this option to locate a client record. When selected, the client search window will open.



You can retrieve a client by any of the five methods listed in the window. Click the radio button next to the field you wish to search for, enter your search criteria in the entry box, then click **Search**.

If no match is found, a message will be displayed indicating same, and you will be returned to the client search window.

When entering search criteria, try to enter as many letters as possible to increase the efficiency of the search. For example, entering a last name of "**B**" might return 500 matches, "**BA**" 45, and "**BAC**" might return 7 matches.

Select Client - 6 found			
Name	Company	City	State
Baccardi, Ms. Tina	NuWave Surfwear	Wildwood	NJ
Bacchus, Ms. Lorraine	Acme Laser Cannons	Lansing	MI
Backner, Mr. Bill	Plutonium Engineering	Portland	OR
Baclawski, Mr. Victor	Minisoft Corporation	Redmond	WA
Bacon, Mr. Kevin W.	Lambda Chi Alpha Fraternity	Indianapolis	IN
Bacrett, Ms. Lisa	University of Pittsburgh	Pittsburgh	PA
+			+
Ad	ld <u>O</u> K <u>C</u> ance	I	

If multiple matches are found, the **Select Client** window will open.

The buttons on this window work as follows:

Add	Opens the client window and adds a new client record.	
ОК	Selects the currently highlighted client and opens either the client	
	window or the profile window. If neither window is currently open or	
	minimized, then your "program defaults" settings dictate which window	
	will open. If the client or profile window is already open (even if	
	minimized), then that window will be loaded with the selected client.	
Cancel	Closes the select client window and returns to client search.	

Description of the Client Window

•		Ms. Tina E	Baccardi		
Name: Title:	Baccardi	Ms. Tina	(Client Type: 📃 重	<u>A</u> dd Edit Delete <u>N</u> ext
Company	NuWave Surfwear				Previous
Dept:	: 009 555-3092 E		Group:	<u>±</u>	Note <u>s</u> E-mail
Acct #	NUW002		Service Contrac	ct / SLA:	Ph <u>o</u> ne # 's Ca <u>l</u> ls
Asset Tag	:	C	ontract: BRONZ	E	Con <u>f</u> ig.
Loc Code		Cor	ntr. Exp: 08/31/9	5 🔟 🖲 Date	Ha <u>r</u> dware Software
Invc Code Priority	DATABS	Min	Charge:	O Minute	S <u>H</u> elp E <u>x</u> it
Address	45 Atlantic Avenue				
Address 2	:				
City	Wildwood				
State	NJ Zip Code	08043			
Country					
Bidg	zon	e:			
Floor	Office	e:			
	0 Calls	1	l of 6		

Default Button Label	Description
Add	Add a new client.
Edit	Change information for the current client.
Delete	Delete the current client. Calls and inventory information can either be deleted with the client or simply unlinked.
Next	Display the next client in the current retrieval set.
Previous	Display the previous client from the current retrieval set.
Notes	View or edit the notes field for this client. The notes feature provides you with a free-form text field which can hold up to 64,000 characters of additional information.

E-mail	Open the E-mail Address window. This allows you to store an unlimited number of e-mail addresses for the client (i.e. CompuServe, Internet, cc:Mail, etc.).
Phone #s	Open the Telecommunications window. This feature allows you to store an unlimited number of phone numbers for this client. Categories include phone, fax, modem and pager number.
Config.	Choose this option to list or edit the configurations for this client. All hardware and software for a client must be part of a configuration. Each client can have an unlimited number of configurations, each with an unlimited number of hardware and software components.
Hardware	Open the hardware selection window to view or edit the hardware that is linked to this client.
Software	Open the software selection window to view or edit the software that is linked to this client.
Help	Open the on-line Help window.
Exit	Close (or minimize, depending on your HDWIN.INI settings) the client window.

Client Window Buttons

This section will detail the effects of clicking each of the buttons on the client window.

<u>A</u>dd

This button is used to add a new client. It is the same as choosing **Client**, **Add** from the main menu.

Edit

Edit allows you to modify information for the current client. For descriptions of the fields and buttons, refer to the section on **Add** above.

<u>D</u>elete

The Delete button is used to delete the current client. When a client is removed from the database, all associated calls and inventory must be either unlinked or deleted. A dialog box prompts you for a decision.



Choose **OK** to delete the client and take the action indicated by the radio buttons for calls and configurations (inventory), or choose **Cancel** if you do not wish to delete anything.



Next takes you to the next client record in the retrieval set.

<u>P</u>revious

Previous takes you to the preceding client record in the retrieval set.

Note<u>s</u>

The Notes feature allows you to view or edit the comments associated with this client. Up to 64,000 characters may be entered into this field. Automatic word wrapping is supported.

1	Notes	
		_
	Experienced PC user with exceptional knowledge of word processing, spreadsheets and databases.	Edit
		<u>C</u> ancel



Use this button to access the E-mail Selection window, which allows you to view and edit all e-mail addresses for this client.

-	🛚 E-Mail Selection - Ms. Tina Baccardi 🗾 🗖		
	Carrier program provide a compuserve provide a computer provide a compu	Address 71736,3475 inab@nuwave.com	<u>A</u> dd <u>E</u> dit <u>D</u> elete <u>H</u> elp Exit
	Carrier: Internet Address: tinab@nuwave.com	<u>.</u>	

Description of fields

Default Field Label	Description
Carrier	The carrier or mail system (i.e. Compuserve, America On-Line, cc:Mail, etc).
Address	Address required to send mail to the client over the specified carrier.



This button opens the Phone Selection window, which lists all phone number for the current client. Numbers are categorized as **Phone**, **Fax**, **Pager** or **Modem**. You may make an unlimited number of entries per client. *These phone numbers are in addition to the one stored on the client window*.

	Phone Selection - Ms. Tina Baccardi 🛛 🔽 🔺			
Туре	Description	Number	044	
Ø	Direct	609 555-3092	Edit	
ð	Main Number	609 555-3000	Delete	
ð	Cellular	609 555-6728		
	Office Fax	609 555-3165		
	Pager	609 555-9021		
	Modem	609 555-3443	<u>H</u> elp	
		•	E <u>x</u> it	

When you add or edit an entry, the Telecom Entry window opens to accept your input.

	Telecom En	try	
● Phone ○ Fax	🔿 Pager	🔿 Modem	
Description:		ð	<u>S</u> ave
Number:			<u>C</u> ancel
Pager:			
Prefix:			
Suffix:			
Baud Rate:	<u>*</u>		<u>H</u> elp

The first choice to make is the type of entry your are making. Click the radio button for Phone, Fax, Pager or Modem. The editable fields in the window will change based on your selection. Descriptions of all fields in the window are listed below.

Telecom Entry Field Descriptions

Default Field Label	Description
Description	A description of the number, i.e. Office, Direct Line, Cellular, etc.
Number	The telephone number.

Pager	Pager type, either alphanumeric or numeric.
Prefix	Characters to send to a pager before the message text.
Suffix	Characters to send to a pager after the message text. For numeric pagers, this character is usually the pound sign "#".
Baud Rate	For modems, the maximum connection speed.

Ca<u>l</u>ls

The Calls button displays a selection window of all calls linked to this client.

-	• Ca	II Selection -	Ms. Tina	Baccardi - 3 found	-
	Call Date	Time of Call	Priority	Subject	
	09/26/94	0257pm	1	Corrupt files	Add
	07/11/94	1014am	2	Data problem	
	04/25/94	0242pm	3	Reporting	Edit
					<u>D</u> elete
t	•			+	
	Problem Yiew She was running Windows and her computer locked up. When she tried to reboot, the root directory was trashed. Yiew				
Resolution I had her create a boot disk from another PC and reboot her machine with it. Drive C: was completely unrecognizable to DOS. I then had her try copying Norton Disk Doctor onto the floppy and then run NDD. It gave a series of error messages which it ultimately attempted to					
1					

Within this window you can scroll through all calls that have been logged to the client. The horizontal scroll bar allows you to see additional information for each call. The problem and resolution text for the currently highlighted call can be found in the lower portion of the window.

The **Edit** and **View** buttons open the call window in edit and view modes, respectively. The **Add** button opens the call window and allows you to enter a new call.

Click **Delete** to delete the currently selected call.

The Call Window is pictured and explained below.

-			Call # 1502	20318		▼ ▲
Г	Time of Call	09/26/94 🗔 02:5	7 nm	Client: Ms. Tina	Baccardi	Add
	Drahlann	Obstude supping Mind	r pili		Lothan aha	Edit
	Propiem:	tried to reboot, the root	directory was tr	mputer locked up. ashed.	when she	Delete
			ŕ			<u>S</u> earch
						<u>G</u> oto
						Nezt
						Previous
	Category:	S 💽 SOFTWARE		Last Update: 04/	25/95	Activities
	Subject:	Corrupt files	Ŧ	Technician: FR	ANK 👤	Calls
	Product:	DOS	Ŧ			<u>£</u> isk
	Priority:	1 I I Mission Critic	al			<u>U</u> nlink
	Resolution	L had her create a hoot	disk from anoth	er PC and rehoot	her machine	Halp
	nesolution.	with it. Drive C: was completely unrecognizable to DOS. I then had her				
		try copying Norton Disk Doctor onto the floppy and then run NDD. It gave				
		machine was then able to boot from the hard disk, but most of the				
	Dec Code	- Constant of the state of the second				
	Res. Coue:	Restored from Backup	_	-		
	Status:		v.	hen: 09/26/94	03:30 pm	
	Duration:	35	Cha	arge: \$.00		
	Addl Time:		Addi (Chrg: \$.00		
llı	RMA Number:		Add to solutio	ns when closed:	N	
		비스티				
1	Referral			3 of 3 CLOSED	09/26/94 0330pm	

The Call Window shows all information for the call. We will describe each field first, then each of the buttons.

Call Window Field Descriptions

Default Field Label	Description	
Time of Call	The date and time of the call. These two fields are pre-filled with the system date and time. The calendar button allows you to select a date using your mouse.	
Client	If the call is linked to a client, the client's name is displayed here. When adding a call, the call is automatically linked if the client or profile window is open. An unlinked call is indicated by the message "< <i>not linked</i> >".	
Problem	Up to 64,000 characters of text describing the problem.	
Category	The problem category. A drop-down table exists for this field to validate the data.	
Last Update	This date is maintained automatically by HELP!Desk. It is updated each time the call is modified.	
-------------	---	--
Subject	The subject of the call. A drop-down table exists for this field to validate the data and ensure consistent data entry.	
Product	The product that the client is having a problem with. A drop-down table exists for this field to validate the data and ensure consistent data entry.	
Technician	The technician who is responsible for the call. This default for this field is the name of the current HELP!Desk user. A drop-down table exists for this field to validate the data and ensure consistent data entry.	
Priority	The priority of the call. The initial value of this field is taken from the client's priority field. A drop-down table exists for this field to validate the data and ensure consistent data entry.	
Resolution	Up to 64,000 characters of text describing the resolution of the call.	
Res. Code	The resolution code is used to categorize the way in which each problem was resolved. A drop-down table exists for this field to validate the data and ensure consistent data entry.	
Status	The current status of the call. Some entries in this field will pre-fill the "When" date and time, and also generate network messages and ticklers. A drop-down table exists for this field to validate the data and ensure consistent data entry.	
When	This is the action date/time for the "Status" field. It is used to indicate when a call was closed or when follow-up or other activity should occur.	
Duration	The time taken to resolve the call. This is the actual time spent working on the problem, not the elapsed time between when a call was opened and when it was closed. The duration is always displayed in minutes, but can be entered in days, hours and/or minutes. For example, 1 day, 2 hours and 35 minutes would be entered as 1D2H35M . The program default Number of work hours in day is used to convert the "day" entry into hours. Duration is accumulated automatically as long as the call remains in edit mode.	

Charge	The charge can be entered manually or computed automatically. If computed, its value is determined by the duration , the client's minimum charge per call , and the program default billing rate , billing increment , minimum charge per call and minimum charge per activity .	
Addl Time	Any additional time that needs to be tracked, such as time charged by an outside repair firm or consultant.	
Addl Charge	Any additional charges that need to be applied against this call, such as a repair bill from a service company.	
RMA Number	A Return Materials Authorization Number that can be assigned if the client needs to return merchandise.	
Add to Solutions when closed	If " Y " is entered here, this call will be marked for inclusion into the Solutions database. Only calls that have been added to the Solutions database can be found when performing a key word search in the Solutions module.	

Call Window Buttons



The Add button allows you to add a new call. If the client or profile window is still open, the new call will automatically be linked to the client. The call date and time will default to the system date and time, and the assigned technician will default to the currently logged-in user.

Edit

Click this button to make changes to the current call. If the call is open, then the duration will continue to accumulate while you are in edit mode.

<u>D</u>elete

Click this button to delete the call. You will be prompted to confirm your intention.

|--|

This option allows you to search for calls using various criteria.

🛥 Call Search	
○ C <u>a</u> ll Date	Saarah
⊖ Su <u>bj</u> ect	Search
• Product	<u>C</u> ancel
○ <u>F</u> ollow-up Date	
○ Assignee	
Account Number	
○ <u>R</u> MA Number	
Resolution Code	
	-
NMS	

Click the radio button or field label of the field you wish to search by, enter your search criteria, then click **Search**. If more than one match is found, the Call Selection window will open.

Call Search - 2 found						
Product	Call Date	Subject				
NMS	11/24/93	Printing				
NMS	02/18/94	Printing				
+		→	<u>C</u> ancel			
Client Call # 518						
	Problem					
About NMS 3.02						
He said he could not print any reports from the system and he kept getting "Printer Not Ready" box. On the Computer System Information screen, showed "Printer: Not						
Resolution						
<02/18/94 15:39 FRANK> Called him back at the prescribed time, but he was gone. He'll be back on Tuesday 02/22/94.						
<02/28/94 09:10 FRANK> They recently had a new network installed (with a new						

From this window you would select the desired call and click **OK**. Note that a successful search changes the retrieval set of calls. From the call window, **Next** and **Previous** will move you through the calls that were displayed in the window above.



The Goto button allows you to quickly retrieve a single call by call number (also called work order number). Simply enter the number of the desired call and click **OK**.

1	Goto Call	
Enter Ca	II:	OK Cancel

<u>N</u>ext

The Next button takes you to the next call in the retrieval set.

<u>P</u>revious

Previous takes you to the preceding call in the retrieval set.

Acti<u>v</u>ities

This button opens the Activities window. This module allows you to independently track every step taken in the resolution of a call. While you are not required to use activities with your call logging, doing so provides opportunity for better management of technical staff and more accurate tracking of each technician's workload.

Even if you choose to not use activities, HELP!Desk creates a number of activities automatically which it uses when generating response time statistics, network messages and ticklers.

-	Activities for Call #15020318					
Start Date	Start Time	Activity		Technician	Priority	<u>A</u> dd
04/26/95	03:24 pm	Returned call		FRANK	1	<u>E</u> dit
						<u>D</u> elete
						<u>R</u> eassign
						<u>H</u> elp
•					+	<u>Ex</u> it
Start Date: 04/26/95 End Date: 04/26/95 Duration: 1 Charge: \$.00 Activity: Returned call Technician: FRANK F Date: 04/26/95 11 04:00 pm X Tickle						

The Activities Window displays a list of all activities for the current call. The highlighted activity is shown in its entirety in the lower portion of the window. This is also where data entry takes place when an activity is added or edited.

Activities Window Field Descriptions

Default Field Label	Description
Start Date	The starting date of the activity. It is automatically set to the system date and cannot be changed.
Start Time	The time the activity was created. It is set to the current system time and cannot be changed.
End Date and End Time	These fields are used to indicate when the activity was completed. If the fields are left blank, they will be set to the system date and time when you click the Save button.
Duration	The time spent performing the activity. If left blank, the elapsed time of the activity will be stored here.
Charge	The charge to the client for this activity.
Auto Compute	If checked, the charge will be computed automatically based on the duration , billing rate , billing increment and minimum charge per activity .
Activity	A brief description or purpose of the activity.
Technician	The name of the technician who performed the activity.
Priority	The priority of the call. Changes made here are reflected back in the call window.
Status	The status of the call as of the completion of this activity. The call window is updated with this status.
Date	The date and time related to the status, such as when the call was closed or when a follow-up call should be made.
Tickle	If checked, a tickler will be generated for the technician named in the activity, with an event date and time corresponding to the status date above.
Detail	Up to 64,000 characters of text describing in detail the action that was taken in performing this activity.

Activities Window Button Descriptions

Default Button Label	Description		
Add	Add a new activity.		
Edit	Edit the selected activity.		
Delete	Delete the selected activity upon confirmation.		
Reassign	This generates a special activity to reassign the call to another technician.		
	■ Reassign Call to Technician: Image: Concentration of the second secon		
	When reassigning a call, you will be prompted to enter the name of the technician who will be receiving the call, as well as any changes in the call's priority or status. If Tickle is checked, a tickler will be generated for the receiving technician.		
Help	Opens the Help window.		
Exit	Closes the Activities window.		
Save	In add/edit mode, saves the current changes.		
Save/Exit	In add/edit mode, saves the changes and closes the Activities window.		
Cancel	In add/edit mode, cancels editing without saving the changes.		



The Calls button opens the Call Selection window, which lists all calls in the current retrieval set.

-	Call Browse				
Call Date	Time of Call	Priority	Subject	16 mm	
09/26/94	0257pm	1	Corrupt files	view	
07/11/94	1014am	2	Data problem		
04/25/94	0242pm	3	Reporting		
•			→	E <u>x</u> it	
Client	Client Ms. Tina Baccardi Call # 15020318				
Problem					
She was running Windows and her computer locked up. When she tried to reboot, the root directory was trashed.					
Resolution					
I had her create a boot disk from another PC and reboot her machine with it. Drive C: was completely unrecognizable to DOS. I then had her try copying Norton Disk Doctor onto the floppy and then run NDD. It gave a series of error messages which it ultimately attempted to rectify. The machine was then able to boot from the hard					

The calls are listed in the upper portion of the window. The problem and resolution of the highlighted call are shown below. A horizontal scroll bar allows you to scroll through all of the fields in the call. A vertical scroll bar, when required, allows you to scroll through all calls in the retrieval set.

Click the **View** button to load the selected call into the call window, where it may be viewed or edited.

<u>L</u>ink

This button allows you to link a call to a client. If you want to move a call from one client to another, you must first unlink from the original client.

Link Call #15020318			
Link Call to Ms. Lorraine Bacchus?			
<u>0</u> K	<u>S</u> earch	<u>C</u> ancel	

If a client or profile window is open, you will have the opportunity to link the call to that client or search for any other client. If no client or profile window is open, you will be put into search mode to find a client.



Unlink allows you to remove the link a call has to a particular client, or change the link to a different client. Unlink generates the following dialog box:

-	Unlink Call #15020318			
	Unlink Call from Ms. Tina Baccardi?			
	<u>0</u> K	Move	<u>C</u> ancel	

OK will break the current link and leave the call without a link to any client. **Move** will unlink the call from the current client, and open the client search window so you can find a new client to link it to.

Cancel will leave the existing link intact.

<u>H</u>elp

Click the button to access the help file.

E<u>z</u>it

Click this button to close (or minimize) the call window. Whether the window is closed or minimized depends upon the following setting in your HDWIN.INI file.

[CallWindow] Exit=close or minimize



Client button. Click this button to open the client or profile window showing the client to whom this call is linked.



Referrals button. Click this button to create a referral for this call or see a list of previously generated referrals for the call.

Referred Date Time Referred by Referred to 09/26/94 03:41 pm FRANK Sales Department	<u>A</u> dd
09/26/94 03:41 pm FRANK Sales Department	
	<u>E</u> dit
	<u>)</u> elete
	<u>H</u> elp
+	E <u>x</u> it
Referred Date 09/26/94 III Time 03:41 pm	
Referred by FRANK Sales Department	<u>+</u>
Comments We need to make sure our clients have backups!	

Referrals are used when people or groups outside the technical staff need to be made aware of an issue contained in a call. For example, if a customer suggests a product enhancement, the help desk staff may log and close the call, but the customer's suggestion needs to be seen by the product development staff. A referral to product development will ensure the suggestion is seen.

Referrals Window Field Descriptions		
Default Field Label	Description	
Referred Date	Date the referral was generated. Defaults to current system date.	
Time	Time the referral was generated. Defaults to current system time.	
Referred by	The person making the referral. Defaults to the current technician.	
Referred to	The department, group or person who will be the recipient of the referral.	

_. . . _ . ..

Comments

Under Reports, Referral Reporting you can generate detailed reports listing all calls that have been referred to a specific group or person within a date range you specify.

The reason for the referral.

Note: A Referral is used to make another group or department aware of an issue raised in a call. It is not intended to escalate a call. Call escalation is done through the Reassign activity.



Survey button. Click this button to record responses to customer satisfaction surveys. This feature allows you to quantify your customers' satisfaction with the help they receive from the help desk. The survey entry screen is as follows:

-	Satisfaction Survey Report	
	Survey Date: 04/27/95	<u>S</u> ave
	Client: Ms. Tina Baccardi	Save/Exit
	Score: 📃 👱	
	Logged by: KEITH	
	Notes:	<u>H</u> elp
		<u>C</u> ancel

Survey Window Field Descriptions

Default Field Label	Description
Survey Date	Date survey was taken. Defaults to current system date.
Client	Name of the person who was surveyed. Defaults to the client who the call is linked to.
Score	Satisfaction rating given by the client. A table exists for data validation.
Logged by	The name of the person who surveyed the client. Default is the currently logged-in user.
Notes	Up to 64,000 characters of text describing the customer's response.

Once a survey has been entered for a call, the button will change to USA. Only one survey entry is permitted per call, but it can be edited as needed.

Reports are available to list calls with surveys, without surveys, with certain scores, etc. Choose **Reports, Survey Reporting** for a complete list of available reports.





Tickler button. Click this button to generate a tickler. This button and the 🕰 button on the toolbar perform the same action, except this tickler button uses information from the call to provide default values for many of the fields.

List of Ticklers - 3 found				
List of Ticklers For FRANK				
Event Date	Event Time	Tech Name	Event Description	<u>A</u> dd
04/26/95 04/27/95	04:00 pm 11:01 am	FRANK FRANK	Call #15020318 Return c Call John Simms about ha	<u>E</u> dit
04/26/95	04:00 pm	FRANK	Call# 15020318	<u>D</u> elete
				Print
				<u>H</u> elp
•			+	E <u>x</u> it
Tech Name: FRANK				
Event Date: 04/26/95 💷 Event Time: 04:00 pm				
Event Description Call# 15020318				

Tickler Window Field Descriptions

Default Field Label	Description
Tech Name	Name of person who will receive the tickler. Default is the assignee of the call.
Event Date	The date the tickler becomes due. Default is the status date of the call.
Event Time	The time the tickler becomes due. Default is the status time of the call.
Event Description	The purpose of the tickler. Default is the call number of the current call.

The drop-down at the top of the window defaults to your log-in name so that your ticklers are displayed. If your security access rights allow, you may use the drop-down to select another technician and view his or her ticklers. Regardless of your security level, you can always generate a tickler for any technician.

Remember...

You must run the HDALERT program if you want automatic notification whenever a tickler is due.



This button accesses a selection window of all configurations (hardware and software inventory) for the current client. Configurations are used to tie all of the hardware and software components of a computer system together. For example, your desktop PC consists of a CPU, monitor, keyboard, disk drives, memory, peripherals such as a CD-ROM drive, speakers, sound card, printer, network, mouse and numerous software packages. Each client may possess an unlimited number of configurations, with each configuration containing an unlimited number of hardware and software components.

🛥 Configura	ation Selection - Ms. Tina Bacc	ardi 🗖 🗖
Configuration	Description	1
Main	Desktop computer	<u>A</u> dd
Notebook	Notebook computer	Edit
		 Delete
		Ha <u>r</u> dware
		Soft <u>w</u> are
		Unlink
Configuration	Main	<u>H</u> elp
		E <u>x</u> it
Description	Desktop computer	

The upper portion of the window lists this client's configurations. The lower portion is used to add or edit a configuration.

<u>A</u>dd

Click the Add button to enter a new configuration.

<u>E</u>dit

Click Edit to change the configuration name or description.

<u>D</u>elete

The Delete button allows you to delete the configuration. All associated hardware and software will be deleted.

Ha<u>r</u>dware

The Hardware button will display a selection window of all hardware that is part of the highlighted configuration. Scroll bars allow you to view each piece of hardware. The full detail of the selected piece is shown in the lower portion of the window.

🛥 Hardv	vare for Configuratio	n - Main - 9 found		▼ ▲
Туре	Brand	Model	±	
COMPUTER	Gateway 2000	486DX2/66		Add
KEYBOARD	Gateway 2000	14587		
MOUSE	Microsoft	37967		<u>E</u> dit
SOUND CARD	Logitech	Soundman Wave		Delete
SPEAKERS	Labtec	CS-550	-	
+		+		
Configuration:	Main Ms	. Tina Baccardi	t	House
Туре:	COMPUTER		П	Unlink
Brand:	Gateway 2000			
Model:	486DX2/66			Help
Description:	Tower PC with 16MB RAM	, dual floppy		Exit
Serial #	398098F3984		÷	

Description of Buttons



Click the Add button to enter a new piece of hardware for this configuration. Data entry takes place in the Hardware window, shown below.

- H	ardware Entry	
Configuration: Main	Ms. Tina Baccardi	
Туре:		
Brand:		
Model:		<u>S</u> ave
Description:		Brownee
Serial #		Diowse
Asset Tag:		<u>H</u> elp
Shared?:		Cancel
Purch Date: 00/00/00	PO Number:	
Price: 0	Vendor: 📃 보	
Warranty:	Warranty Exp: 00/00/00	
Service Code:	Svc Expires: 00/00/00	
Depreciate: 🗖	Curr. Value: 0	

Hardware Entry Field Descriptions

Default Field Label	Description
Configuration	The name of the configuration and the client (if linked) are displayed here.
Туре	The type or category of hardware.

Brand	The brand or manufacturer.	
Model	The model name or number.	
Description	The description of the hardware.	
Serial #	Serial number.	
Asset Tag	The assigned asset tag of the hardware.	
Shared	This field is used to identify equipment that is shared by several clients, such as a network printer. If the equipment is not shared, enter " N ". If it is shared, enter " P " or " S " for primary or secondary, respectively. Each piece of shared equipment should be listed under each client who shares it. This field should be marked " S " for all but one client, who should be " P ". In reports, the hardware will be listed under each client, but will only be added to totals if the Shared field is "N" or " P ".	
Purch Date	Purchase date.	
PO #	Puchase order number.	
Price	Purchase price.	
Vendor	Company the hardware was purchased from. The drop-down for this field accesses the vendor table.	
Warranty	The length of the warranty period. Enter a number followed by " Y " (years), " M " (months) or " D " (days). For example, 1Y, 3M or 90D. If the purchase date has been filled in, the warranty period will be used to compute a default value for the next field, warranty expiration date	
Warranty Exp	Warranty expiration date. A default value is computed if Purchase Date and Warranty fields contain data.	
Service Code	Identifies the company which is responsible for servicing the equipment. The drop-down list accesses the Service Company table.	
Svc Expires	The date the service contract on this equipment expires. Reports can be generated giving you advance notice of when warranties and service contracts expire.	
Depreciate	Check this box if the value of this equipment is depreciated over time.	
Curr. Value	The current (depreciated) value of the equipment.	



While entering data into the hardware window, you can click the Browse button to access the hardware table. The table can contain the basic descriptions of equipment that is widely used by your clients, thus speeding data entry.

Hardware Table - 12 found			
Туре	Brand	Model	
CD-ROM	Sony	CD2X4700	
COMPUTER	Gateway 2000	486DX2/66	
HARD DISK	Seagate	ST5983	<u>P</u> rint
harddrive	gateway	65454-ded	Canad
harddrive	gateway	78942cvsd	
keyboard	gateway	14587	
KEYBOARD	Gateway 2000	14587	
monitor	gateway	1024	
MONITOR	NEC	5FG	
MOUSE	Microsoft	37967	
SOUND CARD	Logitech	Soundman Wave	
+			•

The Hardware Table contains type, brand, model, price and warranty fields. Click **OK** to load the selected table entry into your hardware window.

The **Print** button prints a list of all entries in the table, while **Cancel** closes the table without updating your hardware window.

<u>E</u>dit

The Edit button loads the selected item into the Hardware Window and allows you to change the information. For a complete description of the fields, refer to the **Add** text above.



Click this button to delete the highlighted piece of hardware.



Click the House button to access house hardware. This enables you to move a piece of hardware from house inventory into the current configuration.

9	House Hardware	- 5 found	▼ ▲
Түре	Brand	Model	
HARD DISK	Seagate	ST4031	Add
MONITOR	NEC	3D	
MONITOR	NEC	4D	Edit
MONITOR	NEC	5FG	Delete
MONITOR	NEC	5FG	
+		+	
-		•	
Configuration:	< None > <	ot Linked>	Move
Туре:	HARD DISK		
Brand:	Seagate		
Model:	ST4031		Help
Description:	500 mb		Exit
Serial #	2897RE9873	+	

The top portion of the window contains a scrollable list of all hardware in house inventory. The scrollable lower area contains the detail of the selected item.

The **Add**, **Edit** and **Delete** buttons allow you to add to house inventory, edit an existing item or delete an item, respectively. The **Move** button takes the selected item out of house inventory and moves it into the current configuration. If the item in house inventory is part of a configuration, you will be asked if you want to move the single piece or the entire configuration.

<u>U</u>nlink

The Unlink button allows you to move the selected piece of hardware to another client or to house inventory. If you are moving to another client and that client has multiple configurations, you will be further prompted to select the desired configuration.



Click this button to access help.



Click this button to close the hardware selection window.



The Software button will display a selection window of all software that is part of the highlighted configuration. Scroll bars allow you to view each piece of software. The full detail of the selected piece is shown in the lower portion of the window.

= Software for Configuration - Main - 7 found 🗾 🗖 🔺				
Туре	Manufacturer	Product Name	t	
WORD PROCESSING	Novell	WordPerfect		Add
HELP DESK	Coastal Technologies	HELP!Desk		
PIM	Chronologic	Instant Recall		Edit
SHELL	Symantec	Norton Desktop		Delete
ENVIRONMENT	Microsoft	Windows	Ŧ	Delete
+		+		
			_	
Configuration: Main Ms. Tina Baccardi		House		
Type: WORD PROCESSING			Н	Unlink
Manufacturer: Novell				
Product Name: WordPerfect				
Description:				
Serial #				
			Ľ	

Description of Buttons

<u>A</u> dd

Click the Add button to enter a new piece of software for this configuration. Data entry takes place in the Software window, shown below.

<mark>ها</mark> ٤	Software Entry	
Configuration: Main	Ms. Tina Baccardi	
Туре:		
Manufacturer:		
Product Name:		<u>S</u> ave
Description:		Browned
Version:		DIOWSE
Serial #		<u>H</u> elp
Shared?: 📃 👤		Cancel
Asset Tag:		
Purch Date: 00/00/00 🔟	PO Number:	
Price: 0	Vendor: 📃 👤	
Warranty:	Warranty Exp: 00/00/00	
Service Code: 📃 👤	Service Exp: 00/00/00	
Lic. Starts: 00/00/00	Lic. Ends: 00/00/00	
Depreciate ?:	Curr. Value: 0	

Software Entry Field Descriptions

Default Field Label	Description
Configuration	The name of the configuration and the client (if linked) are displayed here.
Туре	The type or category of software.
Manufacturer	The brand or manufacturer.
Product Name	The product name or model.
Description	The description of the software.
Version	Product version.
Serial #	Serial number.
Asset Tag	The assigned asset tag of the software.
Shared	This field is used to identify software that is shared by several clients, such as an e-mail program. If the software is not shared, enter " N ". If it is shared, enter " P " or " S " for primary or secondary, respectively. Each shared program should be listed under each client who uses it. This field should be marked " S " for all but one client, who should be " P ". In reports, the software will be listed under each client, but will only be added to totals if the Shared field is "N" or "P".
Purch Date	Purchase date.
PO #	Puchase order number.
Price	Purchase price.
Vendor	Company the software was purchased from. The drop-down for this field accesses the vendor table.
Warranty	The length of the warranty period. Enter a number followed by " Y " (years), " M " (months) or " D " (days). For example, 1Y, 3M or 90D. If the purchase date has been filled in, the warranty period will be used to compute a default value for the next field, warranty expiration date.
Warranty Exp	Warranty expiration date. A default value is computed if Purchase Date and Warranty fields contain data.
Service Code	Identifies the company which is responsible for maintaining the software. The drop-down list accesses the Service Company table.

Svc Expires	The date the maintenance contract on this software expires. Reports can be generated giving you advance notice of when warranties and service contracts expire.	
Lic. Starts	The license starting date. This field and the license ending date below are intended to help you monitor your use of evaluation software.	
Lic. Ends	License ending date.	
Depreciate	Check this box if the value of this software is depreciated over time.	
Curr. Value	The current (depreciated) value of the software.	

<u>B</u>rowse

While entering data into the software window, you can click the Browse button to access the software table. The table can contain the basic descriptions of software that is widely used by your clients, thus speeding data entry.

Software Table - 13 found			
Туре	Manufacturer	Product Name	+
CUSTOM	Coastal Technologies	CitiShip	
DATABASE	Borland	Paradox	
ENVIRONMENT	Microsoft	Windows	<u>P</u> rint
GRAPHICS	Z-SOFT	PhotoFinish	Cancol
HD	Coastal Technologies	HELP!Desk	
HELP DESK	Coastal Technologies	HELP!Desk	
os	Microsoft	MS-DOS	
PIM	Chronologic	Instant Recall	
REPORT WRITER	Concentric Data	R&R	
SHELL	Symantec	Norton Desktop	
SPREADSHEET	Lotus	1-2-3	
		-	-

The Software Table contains type, manufacturer, product name, version, price and warranty fields. Click **OK** to load the selected table entry into your software window.

The **Print** button prints a list of all entries in the table, while **Cancel** closes the table without updating your software window.

<u>E</u>dit

The Edit button loads the selected item into the Software Window and allows you to change the information. For a complete description of the fields, refer to the **Add** text above.



Click this button to delete the highlighted piece of software.



Click the House button to access house software. This enables you to move a piece of software from house inventory into the current configuration.

-		House Software	39 found		▼ ▲
	Гуре	Manufacturer	Product Name	±	
	USTOM	Coastal Technologies	CitiShip		Add
	ATABASE	Borland	Paradox		
	ATABASE	Borland	dBase		Edit
	ATABASE	Borland	dBase III+		Delete
	ATABASE	Microsoft	Access	+	
	•		+		
	Configuration: < None > <not linked=""> Move Type: CUSTOM Copy Copy Manufacturer: Coastal Technologies Move Copy Product Name: CitiShip Help Exit Version: Image: State of the stat</not>				

The top portion of the window contains a scrollable list of all software in house inventory. The scrollable lower area contains the detail of the selected item.

The **Add**, **Edit** and **Delete** buttons allow you to add to house inventory, edit an existing item or delete an item, respectively. The **Move** button takes the selected item out of house inventory and moves it into the current configuration. If the item in house inventory is part of a configuration, you will be asked if you want to move the single piece or the entire configuration.

The **Copy** button allows you to create a number of copies of a piece of software to match the number of licenses that were purchased. This way, you can move the software to clients as needed. When you no longer have copies in House Software, you know that all of your licenses are in use.



To use the **Copy** function, simply click the button, enter the number of copies you want to make (the total number of licenses less one), and click **OK**.

<u>U</u>nlink

The Unlink button allows you to move the selected piece of software to another client or to house inventory. If you are moving to another client and that client has multiple configurations, you will be further prompted to select the desired configuration.



Exit

Click this button to access help.

Click this button to close the hardware selection window.

Unlink

Click this button to move the selected configuration and its hardware and software components to house inventory or another client.



As in other instances of the Unlink prompt, you have the option to unlink the configuration, which moves the entire configuration to house inventory, or move the entire configuration to another client. If you choose move, you will be able to search for a client, or if a client window is open, link to the open client.

Ha<u>r</u>dware

The Hardware button displays a selection window of all hardware that is linked to the client. Since this method bypasses the configuration window, the listing is not broken down by configuration, rather it is displayed in alphabetical order by type.

😑 Hardware	Selection - Ms. Tina	Baccardi - 12 f	ound	▼ ▲
Түре	Brand	Model	÷	
CD-ROM	Sony	CD2X4700		Add
COMPUTER	Gateway 2000	486DX2/66		
COMPUTER	IBM	ThinkPad 750C		Edit
HARD DISK	Seagate	ST4031		<u>D</u> elete
			+	
			<u>+</u>	
Configuration:	Main Ms	. Tina Baccardi	- +	House
Туре:	CD-ROM			Unlink
Brand:	Sony			
Model:	CD2X4700			Help
Description:	2X CD-ROM drive (internal)			Euli
Serial #			+	

As you scroll through the hardware, you can see the detail of the selected item in the lower portion of the window. The configuration of which the item is a part is also shown there.

Description of Buttons

<u>A</u>dd

Click the Add button to enter a new piece of hardware for this configuration. Data entry takes place in the Hardware window, shown below.

😑 H:	ardware Entry	
Configuration: Main Type: Brand: Model: Description: Serial # Asset Tag:	Ms. Tina Baccardi	<u>Save</u> Browse
Shared?: 👤		
Purch Date: 00/00/00	PO Number:	
Price: 0	Vendor: 📃 👤	
Warranty:	Warranty Exp: 00/00/00	
Service Code:	Svc Expires: 00/00/00	
Depreciate: 🗖	Curr. Value: 0	

Hardware Enti	y Field	Descriptions
---------------	---------	--------------

Default Field Label	Description
Configuration	The name of the configuration and the client (if linked) are displayed here.
Туре	The type or category of hardware.
Brand	The brand or manufacturer.
Model	The model name or number.
Description	The description of the hardware.
Serial #	Serial number.
Asset Tag	The assigned asset tag of the hardware.
Shared	This field is used to identify equipment that is shared by several clients, such as a network printer. If the equipment is not shared, enter " N ". If it is shared, enter " P " or " S " for primary or secondary, respectively. Each piece of shared equipment should be listed under each client who shares it. This field should be marked " S " for all but one client, who should be " P ". In reports, the hardware will be listed under each client, but will only be added to totals if the Shared field is "N" or " P ".
Purch Date	Purchase date.

PO #	Puchase order number.
Price	Purchase price.
Vendor	Company the hardware was purchased from. The drop-down for this field accesses the vendor table.
Warranty	The length of the warranty period. Enter a number followed by " Y " (years), " M " (months) or " D " (days). For example, 1Y, 3M or 90D.
	period will be used to compute a default value for the next field, warranty expiration date.
Warranty Exp	Warranty expiration date. A default value is computed if Purchase Date and Warranty fields contain data.
Service Code	Identifies the company which is responsible for servicing the equipment. The drop-down list accesses the Service Company table.
Svc Expires	The date the service conmtract on this equipment expires. Reports can be generated giving you advance notice of when warranties and service contracts expire.
Depreciate	Check this box if the value of this equipment is depreciated over time.
Curr. Value	The current (depreciated) value of the equipment.

<u>B</u>rowse

While entering data into the hardware window, you can click the Browse button to access the hardware table. The table can contain the basic descriptions of equipment that is widely used by your clients, thus speeding data entry.

	Hardware T	able - 12 found		
Туре	Brand	Model	<u>+</u>	
CD-ROM	Sony	CD2X4700		
COMPUTER	Gateway 2000	486DX2/66		
HARD DISK	Seagate	ST5983		<u>P</u> rint
harddrive	gateway	65454-ded		Canaal
harddrive	gateway	78942cvsd		Cancer
keyboard	gateway	14587		
KEYBOARD	Gateway 2000	14587		
monitor	gateway	1024		
MONITOR	NEC	5FG		
MOUSE	Microsoft	37967		
SOUND CARD	Logitech	Soundman Wave		
•			•	

The Hardware Table contains type, brand, model, price and warranty fields. Click **OK** to load the selected table entry into your hardware window.

The **Print** button prints a list of all entries in the table, while **Cancel** closes the table without updating your hardware window.

<u>E</u>dit

The Edit button loads the selected item into the Hardware Window and allows you to change the information. For a complete description of the fields, refer to the **Add** text above.

<u>D</u>elete

Click this button to delete the highlighted piece of hardware.

<u>H</u>ouse

Click the House button to access house hardware. This enables you to move a piece of hardware from house inventory into the current configuration.

•	House Hardware	- 5 found	▼ ▲
Туре	Brand	Model	
HARD DISK	Seagate	ST4031	Add
MONITOR	NEC	3D	
MONITOR	NEC	4D	Edit
MONITOR	NEC	5FG	Delete
MONITOR	NEC	5FG	
•		⇒	
Configuration:	: None > <	t Linked>	Move
Туре: 占	ARD DISK		
Brand: S	Geagate		
Model: S	ST4031		Help
Description: 5	00 mb		Evit
Serial # 2	897RE9873	*	Lāk

The top portion of the window contains a scrollable list of all hardware in house inventory. The scrollable lower area contains the detail of the selected item.

The **Add**, **Edit** and **Delete** buttons allow you to add to house inventory, edit an existing item or delete an item, respectively. The **Move** button takes the selected item out of house inventory and moves it into the current configuration. If the item in house inventory is part of a configuration, you will be asked if you want to move the single piece or the entire configuration.



The Unlink button allows you to move the selected piece of hardware to another client or to house inventory. If you are moving to another client and that client has multiple configurations, you will be further prompted to select the desired configuration.



Click this button to access help.



Click this button to close the hardware selection window.

Soft<u>w</u>are

The Software button displays a selection window of all software that is linked to the client. Since this method bypasses the configuration window, the listing is not broken down by configuration.

😑 Software	Selection - Ms. Ti	na Baccardi - 7 fou	ınd	▼ ▲
Туре	Manufacturer	Product Name	÷	
PIM	Chronologic	Instant Recall		Add
SHELL	Symantec	Norton Desktop		
ENVIRONMENT	Microsoft	Windows		Edit
OS	Microsoft	MS-DOS		Delete
GRAPHICS	Z-SOFT	PhotoFinish	+	201010
+		•	•	
Configuration: Type: Manufacturer: Product Name: Description:	Main PIM Chronologic Instant Recall	Ms. Tina Baccardi	•	House Unlink
		_	+	E <u>x</u> it
		•		

Description of Buttons



Click the Add button to enter a new piece of software for this configuration. Data entry takes place in the Software window, shown below.

🛥 S	oftware Entry	
Configuration: Main	Ms. Tina Baccardi	
Туре:		
Manufacturer:		
Product Name:		<u>S</u> ave
Description:		Browee
Version:		DIOWSC
Serial #		<u>H</u> elp
Shared?: 📃 👤		Cancel
Asset Tag:		
Purch Date: 00/00/00	PO Number:	
Price: 0	Vendor: 📃 👤	
Warranty:	Warranty Exp: 00/00/00	
Service Code: 📃 👤	Service Exp: 00/00/00	
Lic. Starts: 00/00/00	Lic. Ends: 00/00/00	
Depreciate ?: 🔽	Curr. Value: 0	

Software Entry Field Descriptions

Default Field Label	Description
Configuration	The name of the configuration and the client (if linked) are displayed here.
Туре	The type or category of software.
Manufacturer	The brand or manufacturer.
Product Name	The product name or model.
Description	The description of the software.
Version	Product version.
Serial #	Serial number.
Asset Tag	The assigned asset tag of the software.
Shared	This field is used to identify software that is shared by several clients, such as an e-mail program. If the software is not shared, enter " N ". If it is shared, enter " P " or " S " for primary or secondary, respectively. Each shared program should be listed under each client who uses it. This field should be marked " S " for all but one client, who should be " P ". In reports, the software will be listed under each client, but will only be added to totals if the Shared field is "N" or "P".
Purch Date	Purchase date.
PO #	Puchase order number.

Price	Purchase price.
Vendor	Company the software was purchased from. The drop-down for this field accesses the vendor table.
Warranty	The length of the warranty period. Enter a number followed by " Y " (years), " M " (months) or " D " (days). For example, 1Y, 3M or 90D. If the purchase date has been filled in, the warranty period will be used to compute a default value for the next field, warranty expiration date.
Warranty Exp	Warranty expiration date. A default value is computed if Purchase Date and Warranty fields contain data.
Service Code	Identifies the company which is responsible for maintaining the software. The drop-down list accesses the Service Company table.
Svc Expires	The date the maintenance contract on this software expires. Reports can be generated giving you advance notice of when warranties and service contracts expire.
Lic. Starts	The license starting date. This field and the license ending date below are intended to help you monitor your use of evaluation software.
Lic. Ends	License ending date.
Depreciate	Check this box if the value of this software is depreciated over time.
Curr. Value	The current (depreciated) value of the software.



While entering data into the software window, you can click the Browse button to access the software table. The table can contain the basic descriptions of software that is widely used by your clients, thus speeding data entry.

	Software Tabl	e - 13 found	
Туре	Manufacturer	Product Name	
CUSTOM	Coastal Technologies	CitiShip	
DATABASE	Borland	Paradox	
ENVIRONMENT	Microsoft	Windows	<u>P</u> rint
GRAPHICS	Z-SOFT	PhotoFinish	Cancel
HD	Coastal Technologies	HELP!Desk	
HELP DESK	Coastal Technologies	HELP!Desk	
OS	Microsoft	MS-DOS	
PIM	Chronologic	Instant Recall	
REPORT WRITER	Concentric Data	R&R	
SHELL	Symantec	Norton Desktop	
SPREADSHEET	Lotus	1-2-3	
			₽.
		+	

The Software Table contains type, manufacturer, product name, version, price and warranty fields. Click **OK** to load the selected table entry into your software window.

The **Print** button prints a list of all entries in the table, while **Cancel** closes the table without updating your software window.

<u>E</u>dit

The Edit button loads the selected item into the Software Window and allows you to change the information. For a complete description of the fields, refer to the **Add** text above.



Click this button to delete the highlighted piece of software.



Click the House button to access house software. This enables you to move a piece of software from house inventory into the current configuration.

-		House Software	39 found		▼ ▲
	Гуре	Manufacturer	Product Name	±	
	USTOM	Coastal Technologies	CitiShip		Add
D	ATABASE	Borland	Paradox		
D	ATABASE	Borland	dBase		<u>E</u> dit
D	ATABASE	Borland	dBase III+		Delete
	ATABASE	Microsoft	Access	+	
			+		
	Configuration: Type: Manufacturer: Product Name: Description: Version:	< None > CUSTOM Coastal Technologies CitiShip Shipping and Mailing List	t Linked≻	+	Move Cogy Help Exit

The top portion of the window contains a scrollable list of all software in house inventory. The scrollable lower area contains the detail of the selected item.

The **Add**, **Edit** and **Delete** buttons allow you to add to house inventory, edit an existing item or delete an item, respectively. The **Move** button takes the selected item out of house inventory and moves it into the current configuration. If the item in house inventory is part of a configuration, you will be asked if you want to move the single piece or the entire configuration.

The **Copy** button allows you to create a number of copies of a piece of software to match the number of licenses that were purchased. This way, you can move the software to clients as needed and track the number of licenses remaining. When you no longer have copies in House Software, you know that all of your licenses are in use.

Software Copy	
Please enter the number of copies needed.	<u>o</u> k
	<u>C</u> ancel

To use the **Copy** function, simply click the button, enter the number of copies you want to make (the total number of licenses less one), and click **OK**.



The Unlink button allows you to move the selected piece of software to another client or to house inventory. If you are moving to another client and that client has multiple configurations, you will be further prompted to select the desired configuration.



Click this button to access help.



Click this button to close the software selection window.

<u>H</u>elp

The Help button (or F1) accesses the help file.

E<u>x</u>it

The Exit button closes (or depending on your HDWIN.INI settings, minimizes) the Client window.



This option is also used to locate a client. Once a client is found, the Client Profile window is opened. This window summarizes all information about the client, and includes scrollable listings of all of the clients calls, hardware and software.

When this option is selected, the **client search** window will open. You can retrieve a client by any of the five methods listed in the window. Click the radio button next to the field you wish to search for, enter your search criteria in the entry box, then click **Search**.

If no match is found, a message will be displayed indicating same, and you will be returned to the client search window.

-	Select Client - 6 fou	nd	
Name	Company	City	State
Baccardi, Ms. Tina	NuWave Surfwear	Wildwood	NJ
Bacchus, Ms. Lorraine	Acme Laser Cannons	Lansing	MI
Backner, Mr. Bill	Plutonium Engineering	Portland	OR
Baclawski, Mr. Victor	Minisoft Corporation	Redmond	WA
Bacon, Mr. Kevin W.	Lambda Chi Alpha Fraternity	Indianapolis	IN
Bacrett, Ms. Lisa	University of Pittsburgh	Pittsburgh	PA
+			+
	<u>A</u> dd <u>O</u> K <u>C</u> a	ncel	

If multiple matches are found, the Select Client window will open.

The buttons on this window work as follows:

Add	Opens the client window and adds a new client record.
OK	Selects the currently highlighted client and opens the profile window.
Cancel	Closes the select client window and returns to client search.

The Profile Window

•	Client	t Profile - Ms. Tina	Baccardi - (1 of	6)	▼ ▲
		V 🗄 🎽			
Client:	Baccardi, Ms. Tina		(NUVV002)	Calls: 3	
Ī	Nu/Vave Surfwear			BRONZE 8/31/95	
	609 555-3092	Vice Pres	sident .		
			1		
Call Date	Time of Call Pr	iority Status W	hen Call i Delos 45000	FERNICIAN 1949 EBANK	n Su Co
03/26/94	0257pm 1014em	2 C 07	/26/95 15020 (41/94 15020	317 PETER	
04/25/94	0242pm	3 C 04	v25/94 15020	314 KEITH	Re
5 HEOROT	parapin		10020	err putti	
•					+
		Problem			
			. Sola en else trieslate un		
She was	running vvindowys and hed	i ner computer locked up). When she tried to re	spoot, the root directo	bry
1 mas irasi	noa.				
		Resolutio	11		
L had her	avaata a laast dialu fuan	- another DC and vehact	u laav waalaina wiita it . F	Nine Crusse complet	
unrecogn	create a poot disk from izable to DOS . I then k	n another PC and rebool bad her try conving Nort	on Disk Doctor onto th	Prive C: was complet e floppy and then rur	n l
NDD. It ga	ave a series of error n	nessages which it ultima	ately attempted to rectif	y. The machine was	3
P					
Configura	ation Type	Manufacturer	Product Nan	te Descri	iptic 🕈
Main	CD-ROM	Sony	CD2X4700	2X CD-	-RON
Main	COMPUTER	Gateway 2000	486DX2/66	Tower	PC
Notebook	COMPUTER	IBM	ThinkPad 7500	2 486 No	otebo
					- +
Configura	ation Type	Manufacturer	Product Nam	re Descr	iptic 🛨
Main	WORD PROCES	SINCNOVEI	WordPerfect		
h darlar		Coastal Technologi	es HELPIDesk		
Main	HELP DESK	obastar reennologi			
Main Main	PIM	Chronologic	Instant Recall		
Main	PIM	Chronologic	Instant Recall		•

Description of functional areas

Button Bar	The buttons at the top of the window allow you to access (add, edit and delete) any data related to the client.
Client Summary	This area shows basic client information such as name, company or department, phone number, title, account number, support contract type and expiration, and the number of calls on file.
Call List	This scrolling area lists all calls for the client.
Call Detail	This area shows the problem and resolution of the call that is highlighted in the Call List.

Hardware List

This is a scrollable list of all hardware linked to the client.

Software List

This is a list of all software linked to the client.

Descriptions of buttons

For complete details, refer to the button descriptions for the client window.



Previous and Next move through the clients in the current retreival set.



The **Client** button opens the client window allowing you to view or edit all of the client's information.



The **Notes** button allows you to view or edit the notes field for this client. This is a text field which will accept up to 64,000 characters.



The **Phone Numbers** button allows you to view, add or edit any phone numbers (phone, fax, modem, pager) for this client.



The E-mail button allows you to view, add or edit this client's e-mail addresses.



The **Calls** button opens the call window and loads it with the call that is highlighted in the Call List. From here, you have full access to all call information, including activities, referrals and the survey.



The **Add Call** button allows you to add a new call. By default, the call will be linked to the current client.



The **Configurations** button opens the configuration selection window. From here you can create or edit a configuration and access the hardware and software contents of each configuration.



The **Hardware** button is used to access the hardware that is linked to this client, regardless of the configuration it is part of.



The **Software** button opens the software selection window, listing all software linked to this client.



The **Help** system is accessed by this button.



The Exit button is used to minimize or close the profile window.

The profile window can be set to minimize or close upon exiting the window. The change can be made by editing **HDWIN.INI** as follows: [ProfileWindow] Exit=**minimize** or **close**

HDWIN.INI can be found in your \WINDOWS directory.

The Call Menu

<u>A</u> dd	Ctrl+A
Fi <u>n</u> d	
<u>G</u> oto	
Open List	

Call, Add 🛅

Select this option to add a new call. If a **client** window is open, the call will automatically be linked to that client.

-	Call	# 15020318	▼ ▲
Time of Call:	09/26/94 🛛 🛐 02:57 pm	Client: Ms. Tina Baccardi	Add
Problem	She was running Windows and tried to reboot, the root directory	l her computer locked up. When she / was trashed.	Edit Delete Search Goto Next Previous
Category	S SOFTWARE	Last Update: 04/25/95	Acti <u>v</u> ities
Subject:	Corrupt files	Technician: FRANK	Ca <u>l</u> ls
Product:	DOS	<u>±</u>	<u>£</u> āsk
Priority:	1 🛃 Mission Critical]	Unlink
Resolution:	ution: I had her create a boot disk from another PC and reboot her machine with it. Drive C: was completely unrecognizable to DOS. I then had her try copying Norton Disk Doctor onto the floppy and then run NDD. It gave a series of error messages which it ultimately attempted to rectify. The machine was then able to boot from the hard disk, but most of the		
Res. Code:	Restored from Backup 📃 👤	[
Status:		When: 09/26/94 🔟 03:30 pm	
Duration:	35	Charge: \$.00	
Addl Time:		Addl Chrg: \$.00	
RMA Number:	Add to	solutions when closed: N	
1 Referral		3 of 3 CLOSED 09/26/94 0330pm	

The Call Window shows all information for the call. We will describe each field first, then each of the buttons.

Call Window Field Descriptions

Default Field Label	Description
Time of Call	The date and time of the call. These two fields are pre- filled with the system date and time. The calendar button allows you to select a date using your mouse.
Client	If the call is linked to a client, the client's name is displayed here. When adding a call, the call is automatically linked if the client or profile window is open. An unlinked call is indicated by the message " <not linked="">".</not>
Problem	Up to 64,000 characters of text describing the problem.
Category	The problem category. A drop-down table exists for this field to validate the data.
Last Update	This date is maintained automatically by HELP!Desk. It is updated each time the call is modified.
Subject	The subject of the call. A drop-down table exists for this field to validate the data and ensure consistent data entry.
Product	The product that the client is causing the problem. A drop-down table exists for this field to validate the data and ensure consistent data entry.
Priority	The priority of the call. The initial value of this field is taken from the client's priority field. A drop-down table exists for this field to validate the data and ensure consistent data entry.
Resolution	Up to 64,000 characters of text describing the resolution of the call.
Res. Code	The resolution code is used to categorize the way in which each problem was resolved. A drop-down table exists for this field to validate the data and ensure consistent data entry.
Status	The current status of the call. Some entries in this field will pre-fill the "When" date and time, and also generate network messages and ticklers. A drop-down table exists for this field to validate the data and ensure consistent data entry.
When	This is the action date/time for the "Status" field. It is used to indicate when a call was closed or when follow- up or other activity should occur.
Duration	The time taken to resolve the call. This is the actual time spent working on the problem, not the elapsed time between when a call was opened and when it was closed. The duration is always displayed in minutes, but can be entered in days, hours and .or minutes. For example, 1 day, 2 hours and 35 minutes would be entered as 1D2H35M . The program default Number of work hours in day is used to convert the "day" entry into hours. Duration is accumulated automatically as long as the call remains in edit mode.
------------------------------	---
Charge	The charge can be entered manually or computed automatically. If computed, it's value is determined by the duration , the client's minimum charge per call , and the program default billing rate , billing increment , minimum charge per call and minimum charge per activity .
Addl Time	Any additional time that needs to be tracked, such as time charged by an outside repair firm or consultant.
Addl Charge	Any additional charges that need to be applied against this call, such as a repair bill from a service company.
RMA Number	A Return Materials Authorization Number that can be assigned if the client needs to return merchandise.
Add to Solutions when closed	If " Y " is entered here, this call will be marked for inclusion into the Solutions database. Only calls that have been added to the Solutions database can be found when performing a key word search in the Solutions module.

Call Window Buttons



The Add button allows you to add a new call. If the client or profile window is still open, the new call will automatically be linked to the client. The call date and time will default to the system date and time, and the assigned technician will default to the currently logged-in user.

Edit

Click this button to make changes to the current call. If the call is open, then the duration will continue to accumulate while you are in edit mode.

<u>D</u>elete

Click this button to delete the call. You will be prompted to confirm your command. *Note: Deleting a call does not remove it from the Solutions database.*

Search

This option allows you to search for calls.

8	Call Search	
⊖ C <u>a</u> ll [Date	Faarah
⊖ Su <u>b</u> je	ect	Search
● <u>P</u> rodu	uct	<u>C</u> ancel
⊖ <u>F</u> ollo [,]	w-up Date	
🔿 Assig	nee	
⊖ Acc <u>o</u>	unt Number	
⊖ <u>R</u> MA	Number	
⊖ R <u>e</u> sol	lution Code	
NMS		

Click the radio button or field label of the field you wish to search by, enter your search criteria, then click **Search**. If more than one match is found, the Call Selection window will open.

-	_	Call Sea	rch - 2 found			
	Product	Call Date	Subject			
	NMS	11/24/93	Printing			
	NMS	02/18/94	Printing			
	•		•	<u>C</u> ancel		
	Client Call # 518					
		Prob	lem			
	About NMS 3.02					
	He said he could not print any reports from the system and he kept getting "Printer Not Ready" box. On the Computer System Information screen, showed "Printer: Not					
		Resol	lution			
	<02/18/94 15:39 FRANK> He'll be back on Tuesday	 Called him bac 02/22/94. 	k at the prescribed time, but he w	as gone.		
	<02/28/94 09:10 FRANK>	 They recently 	had a new network installed (wit	h a new		

From this window you would select the desired call and click **OK**. Note that a successful search changes the retrieval set of calls. From the call window, **Next** and **Previous** will move you through the calls that were displayed in the window above.



The Goto button allows you to quickly retrieve a single call by call number (also called work order number). Simply enter the number of the desired call and click **OK**.

Goto	Call	
Enter Call:		OK Cancel

<u>N</u>ezt

The Next button takes you to the next call in the retrieval set.

<u>P</u>revious

Previous takes you to the preceding call in the retrieval set.

Acti<u>v</u>ities

This button opens the Activities window. This module allows you to independently track every step taken in the resolution of a call. While you are not required to use activities with your call logging, doing so provides opportunity for better management of technical staff and more accurate tracking of each technicians' workload.

Even if you choose not to use activities, HELP!Desk creates a number of activities automatically which it uses when generating response time statistics, network messages and ticklers.

Activities for Call #15020318					
Start Date	art Date Start Time Activity Te			Priority	Add
04/26/95	03:24 pm	Returned call	FRANK	1	<u>E</u> dit
					Delete
					<u>R</u> eassign
					Help
•				+	E <u>x</u> it
Start Date:	04/26/95	Start Time: 03:24 pm			
End Date:	04/26/95	End Time: 03:25 pm			
Duration:		Charge: \$.00	🗌 🗌 Auto Com	pute	
Activity:	Returned call	Techr	nician: FRANK 📃 🖢	Priority:	±
Status:	-	Date: 04/26/95 🖬 04:0	00 pm 🔀 Tickle		
Detail:	.eft message or	n voice mail			

The Activities Window displays a list of all activities for the current call. The highlighted activity is shown in its entirety in the lower portion of the window. This is also where data entry takes place when an activity is added or edited.

Activities Window Field Descriptions

Default Field Label	Description
Start Date	The starting date of the activity. It is automatically set to the system date and cannot be changed.
Start Time	The time the activity was created. It is set to the current system time and cannot be changed.
End Date and End Time	These fields are used to indicate when the activity was completed. If the fields are left blank, they will be set to the system date and time when you click the Save button.
Duration	The time spent performing the activity. If left blank, the elapsed time of the activity will be stored here.
Charge	The charge to the client for this activity.
Auto Compute	If checked, the charge will be computed automatically based on the duration , billing rate , billing increment and minimum charge per activity .
Activity	A brief description or purpose of the activity.
Technician	The name of the technician who performed the activity.
Priority	The priority of the call. Changes made here are reflected back in the call window.
Status	The status of the call as of the completion of this activity. The call window is updated with this status.
Date	The date and time related to the status, such as when the call was closed or when a follow-up call should be made.
Tickle	If checked, a tickler will be generated for the technician named in the activity, with an event date and time corresponding to the status date above.
Detail	Up to 64,000 characters of text describing in detail the action that was taken in performing this activity.

Activities Window Button Descriptions

Default Button Label	Description	
Add	Add a new activity.	
Edit	Edit the selected activity.	
Delete	Delete the selected activity upon confirmation.	
Reassign	This generates a special activity to reassign the call to another technician.	
	Reassign Call to Technician: Image: Colspan="2">OK Priority: Image: Colspan="2">Mission Critical Status: Figst Follow-UP Cancel When: D0/00/00 Image: Colspan="2">Image: Colspan="2">Concel When: D0/00/00 Image: Colspan="2">Image: Colspan="2">Concel When reassigning a call, you will be prompted to enter the name of the technician who will be receiving the call, as well as any changes in the call's priority or status. If Tickle is checked, a	
Help	Opens the Help window.	
Exit	Closes the Activities window.	
Save	In add/edit mode, saves the current changes.	
Save/Exit	In add/edit mode, saves the changes and closes the Activities window.	
Cancel	In add/edit mode, cancels editing without saving the changes.	



The Calls button opens the Call Selection window, which lists all calls in the current retrieval set.

_			Call	Browse		
Call	Date	Time of Call	Priority	Subject	16	
09/26	/94	0257pm	1	Corrupt files	view	
07/11	/94	1014am	2	Data problem		
04/25	/94	0242pm	3	Reporting		
•				•	<u>Ex</u> it	
	Client Ms. Tina Baccardi Call # 15020318					
She was running Windows and her computer locked up. When she tried to reboot, the root directory was trashed.						
Resolution						
I had C: w Doct it ulti	I had her create a boot disk from another PC and reboot her machine with it. Drive C: was completely unrecognizable to DOS. I then had her try copying Norton Disk Doctor onto the floppy and then run NDD. It gave a series of error messages which it ultimately attempted to rectify. The machine was then able to boot from the hard					

The calls are listed in the upper portion of the window. The problem and resolution of the highlighted call are shown below. A horizontal scroll bar allows you to scroll through all of the fields in the call. A vertical scroll bar, when required, allows you to scroll through all calls in the retrieval set.

Click the **View** button to load the selected call into the call window, where it may be viewed or edited.

<u>L</u>ink

This button allows you to link a call to a client. If you want to move a call from one client to another, you must first unlink from the original client.

😑 Link Call #15020318			
	Link Call	to Ms. Lorraine	Bacchus?
	<u>0</u> K	<u>S</u> earch	<u>C</u> ancel

If a client or profile window is open, you will have the opportunity to link the call to that client or search for any other client. If no client or profile window is open, you will be put into search mode to find a client.



Unlink allows you to remove the link a call has to a particular client, or change the link to a different client. Unlink generates the following dialog box:

Unlink Call #15020318				
	Unlink Call from Ms. Tina Baccardi?			
	<u>0</u> K	Move	<u>C</u> ancel	

OK will break the current link and leave the call without a link to any client. **Move** will unlink the call from the current client, and open the client search window so you can find a new client to link it to.

Cancel will leave the existing link intact.

<u>H</u>elp

Click the button to access the help file.

E<u>z</u>it

Click this button to close (or minimize) the call window. Whether the window is closed or minimized depends upon the following setting in your HDWIN.INI file.

[CallWindow] Exit=close or minimize



Client button. Click this button to open the client or profile window showing the client this call is linked to.



Referrals button. Click this button to create a referral for this call or see a list of previously generated referrals for the call.

		Referrals	- 1 found	
Referred Date	Time	Referred by	Referred to	<u>A</u> dd
09/26/94	03:41 pm	FRANK	Sales Department	<u>E</u> dit
				<u>D</u> elete
				<u>H</u> elp
+			+	E <u>x</u> it
Referred Date	09/26/94	11	Time 03:41 pm	
Referred by	FRANK	生 Refer	red to Sales Department	<u> </u>
Comments	We need to mak	e sure our clie	nts have backups!	

Referrals are used when people or groups outside the technical staff need to be made aware of an issue contained in a call. For example, if a customer suggests a product enhancement, the help desk staff may log and close the call, but the customer's suggestion needs to be seen by the product development staff. A referral to product development will ensure the suggestion is seen.

Default Field Label	Description		
Referred Date	Date the referral was generated. Defaults to current system date.		
Time	Time the referral was generated. Defaults to current system time.		
Referred by	The person making the referral. Defaults to the current technician.		
Referred to	The department, group or person who will be the recipient of the referral.		
Comments	The reason for the referral.		

Referrals Window Field Descriptions

Under **Reports, Referral Reporting** you can generate detailed reports listing all calls that have been referred to a specific group or person within a date range you specify.



Survey button. Click this button to record responses to customer satisfaction surveys. This feature allows you to quantify your customers' satisfaction with the help they receive from the help desk. The survey entry screen is as follows:

-	Satisfaction Survey Report	
	Survey Date: 04/27/95	<u>S</u> ave
	Client: Ms. Tina Baccardi	Save/Exit
	Score:	
	Logged by: KEITH	
	Notes:	Help Cancel

Survey Window Field Descriptions

Default Field Label	Description
Survey Date	Date survey was taken. Defaults to current system date.
Client	Name of the person who was surveyed. Defaults to the client who the call is linked to.
Score	Satisfaction rating given by the client. A table exists for data validation.
Logged by	The name of the person who surveyed the client. Default is the currently logged-in user.
Notes	Up to 64,000 characters of text describing the customer's response.

Once a survey has been entered for a call, the button will change to USA. Only one survey entry is permitted per call, but it can be edited as needed.

Reports are available to list calls with surveys, without surveys, with certain scores, etc. Choose **Reports, Survey Reporting** for a complete list of available reports.





Tickler button. Click this button to generate a tickler. This button and the 🕰 button on the toolbar perform the same action, except this tickler button uses information from the call to provide default values for many of the fields.

List of Ticklers - 3 found						
List	List of Ticklers For FRANK					
Event Date	Event Time	Tech Name	Event Description	Add		
04/26/95 04/27/95	04:00 pm 11:01 am	FRANK FRANK	Call #15020318 Return c Call John Simms about ha	<u>E</u> dit		
04/26/95	04:00 pm	FRANK	Call# 15020318	<u>D</u> elete		
				Print		
•			+	E <u>x</u> it		
Tech Name: FRANK						
Event Date: 04/26/95						
Event Description Call# 15020318						

Tickler Window Field Descriptions

Default Field Label	Description
Tech Name	Name of person who will receive the tickler. Default is the assignee of the call.
Event Date	The date the tickler becomes due. Default is the status date of the call.
Event Time	The time the tickler becomes due. Default is the status time of the call.
Event Description	The purpose of the tickler. Default is the call number of the current call.

The drop-down at the top of the window defaults to your log-in name so that your ticklers are displayed. If your security access rights allow, you may use the drop-down to select another technician and view his or her ticklers. Regardless of your security level, you can always generate a tickler for any technician.

Remember...

You must run the HDALERT program if you want automatic notification whenever a tickler is due.

Call, Find...

This option is used to retrieve an existing call. You have a choice of eight fields to search on, as indicated in the **call search** window below.

😑 🛛 🔤 Call Search	
○ C <u>a</u> ll Date	Saarah
○ Su <u>bj</u> ect	Search
• Product	<u>C</u> ancel
○ <u>F</u> ollow-up Date	
⊖ Assignee	
O Account Number	
○ <u>R</u> MA Number	
C Resolution Code	
NMS	

Click the radio button or field label of the field you wish to search by, enter your search criteria, then click **Search**. If more than one match is found, the Call Selection window will open.

-	Call Search - 2 found						
[Product	Call Date	Subject				
	NMS	11/24/93	Printing				
	NMS	02/18/94	Printing				
	+		+	<u>C</u> ancel			
	Client		Call # 518				
		Probl	em				
	About NMS 3.02						
	He said he could not print any reports from the system and he kept getting "Printer Not Ready" box. On the Computer System Information screen, showed "Printer: Not						
	Resolution						
	<02/18/94 15:39 FRANK> Called him back at the prescribed time, but he was gone. He'll be back on Tuesday 02/22/94.						
	<02/28/94 09:10 FRANK> They recently had a new network installed (with a new						

From this window you would select the desired call and click **OK**. Note that a successful search changes the retrieval set of calls. From the call window, **Next** and **Previous** will move you through the calls that were displayed in the window above.

Call, Goto

This option allows you to quickly retrieve a single call by call number (also called work order number). Simply enter the number of the desired call and click **OK**.

Go	ito Call	
Enter Call:		OK Cancel

If the call is found, it will be displayed in the call window.

Call, Open List

The Open List shows a selection window of all open or pending calls (your own, someone else's, or everyone's).

-			List of ()pen Calls - 18 found		▼ ▲
	L	ist of Calls For	FRANI	< 🛨 💿 Open	O Pendin	g 🔿 Both
	Call Date	Time of Call	Priority	Subject	Pr	View
	03/07/95	12:13 pm	1	Appending Calls to Technician		
	03/07/95	09:51 am	3		AP a	sknowledge
	03/03/95	11:25 pm	1	Appending Calls to Technician		cknowledge
	09/26/94	02:57 pm	1	Corrupt files		
	06/20/94	09:28	5	Error - Type Mismatch	HE	Refresh
	05/05/94	18:48	3	Data problem		
	01/14/94	10:53	1	Advertising	HE	<u>H</u> elp
	08/19/93	10:03 a	2	cross linked memo fields123456	▁╚▋₹▎┢	
l					•	E <u>x</u> it
	Client	Ms. Tina Baccar	di		Call # 1502	20318
				Problem		
	be was runn	ing Windows an	d her comp	uter locked up. When she tried to r	eboot the root	t directory
	vas trashed.	ing r in actio ar	a nor comp			
ľ				Resolution		
15	had her crea	te a boot disk fro	m another F	C and reboot her machine with it. I	Drive C: was (completely
	unrecognizable to DOS. I then had her try copying Norton Disk Doctor onto the floppy and then run					
	NDD. It gave a series of error messages which it ultimately attempted to rectify. The machine was					
ŀ	then able to boot from the hard disk, but most of the directories had been converted to files.					
Ľ	Current as of: Apr 30, 1995 8:38 pm					

By default, this window shows only open calls assigned to you. You can select another technician or ALL from the drop-down to see other open calls. The radio buttons allow you to select **open** calls, **pending**, or **both**. For details on these call status options, refer to the **Status** table under **Utilities**, **Table Maintenance**, **Field Tables**.

The selection window lists all of the calls that meet your criteria. Calls that have not been acknowledged are show in red. These are calls that were logged by someone else, assigned to you, and are waiting for you to acknowledge receipt of them. A call is acknowledged by viewing it or by selecting it and clicking the **Acknowledge** button.

The **Refresh** button updates the list and changes the "*Current as of*..." message to the current date and time.

Details of the selected call (client, if linked, problem and resolution) are shown in the lower portion of the window. You can set the open calls window to open automatically when you start HELP!Desk by making the appropriate setting under **File**, **Preferences**, **Program Defaults**.

H<u>a</u>rdware S<u>o</u>ftware

Inventory, Hardware, House

This option opens the hardware house inventory selection window.

•	House Hardware	- 5 found	-
Type	Brand	Model	
HARD DISK	Seagate	ST4031	Add
MONITOR	NEC	3D	
MONITOR	NEC	4D	Edit
MONITOR	NEC	5FG	Delete
MONITOR	NEC	5FG	
•		+	
Configuration:	: None > <	t Linked>	Move
Туре: 🛛	IARD DISK		
Brand: S	Seagate		
Model: S	ST4031		Help
Description: 5	600 mb		Exit
Serial # 2	897RE9873	+	<u> </u>

The top portion of the window contains a scrollable list of all hardware in house inventory. The scrollable lower area contains the detail of the selected item.

The **Add**, **Edit** and **Delete** buttons allow you to add to house inventory, edit an existing item or delete an item, respectively. The **Move** button takes the selected item out of house inventory and moves it into the current configuration. If no client window is open, the **Move** button will be disabled. If the client has multiple configurations, you will be prompted to select the desired configuration. If the item in house inventory is part of a configuration, you will be asked if you want to move the single piece or the entire configuration.

Add and Edit both open the hardware entry window, which is described in the next section.



This selection opens the hardware search window. You can search for hardware by any of six criteria. Simply click the radion button of the desired search method, enter your criteria and click the **Search** button.

-	Hardware Search	
	● <u>Т</u> уре	<u>S</u> earch
	○ <u>B</u> rand	<u>C</u> ancel
	O <u>M</u> odel	
	○ Se <u>r</u> ial Number	
	⊖ <u>A</u> sset Tag	
	○ <u>P</u> O Number	
	COMPUTER	

If multiple matches are found, the hardware selection window will open.

8	Select Hardware	- 2 found	▼ ▲
Type	Brand	Model	1
COMPUTER	IBM	ThinkPad 750C	
COMPUTER	Gateway 2000	486DX2/66	Edit
			Delete
		→	MGAS
Configuration:	lotebook Ms.	Tina Baccardi	Unlink
Туре:	OMPUTER		
Brand:	ВМ		Halp
Model:	hinkPad 750C		Пер
Description: 4	86 Notebook, active matrix	display	Cancel
Serial # 4	4980F4539	+	

Description of Buttons

<u>E</u>dit

The Edit button loads the selected item into the Hardware Window and allows you to change the information.

Hardware Entry	
Configuration: Notebook Ms. Tina Baccardi	
Type: COMPUTER	
Brand: JBM	
Model: ThinkPad 750C	<u>S</u> ave
Description: 486 Notebook, active matrix display	Brownee
Serial # 14980F4539	DIOWSE
Asset Tag: NB5984	<u>H</u> elp
Shared?: N 👤 No - Single User	Cancel
Purch Date: 12/03/94 📴 PO Number:	
Price: 4800.00 Vendor: IBM	
Warranty: 1 YEAR Warranty Exp: 12/03/95)
Service Code: Svc Expires: 00/00/00)
Depreciate: Curr. Value: 0	

Hardware Entry Field Descriptions

Default Field Label	Description
Configuration	The name of the configuration and the client (if linked) are displayed here.
Туре	The type or category of hardware.
Brand	The brand or manufacturer.
Model	The model name or number.
Description	The description of the hardware.
Serial #	Serial number.
Asset Tag	The assigned asset tag of the hardware.
Shared	This field is used to identify equipment that is shared by several clients, such as a network printer. If the equipment is not shared, enter " N ". If it is shared, enter " P " or " S " for primary or secondary, respectively. Each piece of shared equipment should be listed under each client who shares it. This field should be marked " S " for all but one client, who should be " P ". In reports, the hardware will be listed under each client, but will only be added to totals if the Shared field is "N" or " P ".
Purch Date	Purchase date.
PO #	Puchase order number.
Price	Purchase price.
Vendor	Company the hardware was purchased from. The drop-down for this field accesses the vendor table.

Warranty	The length of the warranty period. Enter a number followed by " Y " (years), " M " (months) or " D " (days). For example, 1Y, 3M or 90D.
	If the purchase date has been filled in, the warranty period will be used to compute a default value for the next field, warranty expiration date.
Warranty Exp	Warranty expiration date. A default value is computed if Purchase Date and Warranty fields contain data.
Service Code	Identifies the company which is responsible for servicing the equipment. The drop-down list accesses the Service Company table.
Svc Expires	The date the service contract on this equipment expires. Reports can be generated giving you advance notice of when warranties and service contracts expire.
Depreciate	Check this box if the value of this equipment is depreciated over time.
Curr. Value	The current (depreciated) value of the equipment.

<u>B</u>rowse

While entering data into the hardware window, you can click the Browse button to access the hardware table. The table can contain the basic descriptions of equipment that is widely used by your clients, thus speeding data entry.

-	Hardware Table - 12 found					
	Туре	Brand	Model	_	t	
	CD-ROM	Sony	CD2X4700			
	COMPUTER	Gateway 2000	486DX2/66			
	HARD DISK	Seagate	ST5983			<u>P</u> rint
	harddrive	gateway	65454-ded			Canad
	harddrive	gateway	78942cvsd			Cancer
	keyboard	gateway	14587			
	KEYBOARD	Gateway 2000	14587			
	monitor	gateway	1024			
	MONITOR	NEC	5FG			
	MOUSE	Microsoft	37967			
	SOUND CARD	Logitech	Soundman Wave			
	+			•	+	

The Hardware Table contains type, brand, model, price and warranty fields. Click **OK** to load the selected table entry into your hardware window.

The **Print** button prints a list of all entries in the table, while **Cancel** closes the table without updating your hardware window.



Click this button to delete the highlighted piece of hardware.

<u>M</u>ove

The Move button will take an unlinked (house inventory) item and link it to the client shown in the Client or Profile window. This button is disabled unless there is an open client or profile window and the current inventory item is unlinked.



The Unlink button allows you to move the selected piece of hardware to another client or to house inventory. If you are moving to another client and that client has multiple configurations, you will be further prompted to select the desired configuration.



Click this button to access help.



Click this button to close the hardware selection window.

Inventory, Software, House

This option opens the selection window of house software. House software is any software entry that is not linked to a client. It may be part of a configuration.

	House Software -	39 found		▼ ▲	
Гуре	Manufacturer	Product Name	t		
USTOM	Coastal Technologies	CitiShip		Add	
ATABASE	Borland	Paradox			
ATABASE	Borland	dBase		Edit	
ATABASE	Borland	dBase III+		Delete	
ATABASE	Microsoft	Access	Ŧ	20000	
•		+			
Configuration: < None > Type: CUSTOM Manufacturer: Coastal Technologies Product Name: CitiShip Description: Shipping and Mailing List Version: +					

The top portion of the window contains a scrollable list of all software in house inventory, regardless of configuration. The scrollable lower area contains the detail of the selected item.

The **Add**, **Edit** and **Delete** buttons allow you to add to house inventory, edit an existing item or delete an item, respectively. The **Move** button takes the selected item out of house inventory and moves it into the current configuration. If no client window is open, the **Move** button will be disabled. If the client has multiple configurations, you will be prompted to select the desired configuration. If the item in house inventory is part of a configuration, you will be asked if you want to move the single piece or the entire configuration.

The **Copy** button allows you to create a number of copies of a piece of software to match the number of licenses that were purchased. This way, you can move the software to clients as needed. *When you no longer have copies in House Software, you know that all of your licenses are in use.*



To use the **Copy** function, simply click the button, enter the number of copies you want to make (the total number of licenses less one), and click **OK**.



This selection opens the software search window. You can search for software by any of six criteria. Simply click the radio button of the desired search method, enter your criteria and click the **OK** button.



If multiple matches are found, the Select Software window will open.

0	Select Software	· 43 found			•	•
Туре	Manufacturer	Product Name	t			
LAN	Novell	Netware 386				_
LAN	Novell	Netware 386	Ц	Ed	lit	L
LAN	DEC	Pathworks	Н			۰.
LAN	Microsoft	Windows/Workgroups		Del	ete	
LAN	Novell	Netware 386	\square	<u>_</u> .		٦,
•		+	•	Mo	88	
Configuration:	lain Ms.	. Deborah J. Johnson	•		·	ז
Type: L	AN			Ūni	INK	J,
Manufacturer: N	ovell			Но	In	٦
Product Name: N	etware 386				η.	٦,
Description:				Can	cel	
Version: 3	.11		÷			4

<u>E</u>dit

The Edit button loads the selected item into the Software Window and allows you to change the information.

-	S	oftware Entry	
Configuration:	Main	<not linked=""></not>	
Туре:	LAN		
Manufacturer:	Novell		
Product Name:	Netware 386		<u>S</u> ave
Description:			Browee
Version:	3.11		Diowse
Serial #			<u>H</u> elp
Shared ?:	N 👤 No - Singl	le User	Cancel
Asset Tag:			
Purch Date:	00/00/00	PO Number:	
Price:	0	Vendor: 📃 👤	
Warranty:		Warranty Exp: 00/00/00	
Service Code:	SELF 👤	Service Exp: 00/00/00	
Lic. Starts:	00/00/00	Lic. Ends: 00/00/00	
Depreciate?:		Curr. Value: 0	

Software Entry Field Descriptions

Default Field Label	Description
Configuration	The name of the configuration and the client (if linked) are displayed here.
Туре	The type or category of hardware.
Manufacturer	The brand or manufacturer.
Product Name	The product name or model.
Description	The description of the software.
Version	Product version.
Serial #	Serial number.
Asset Tag	The assigned asset tag of the software.
Shared	This field is used to identify software that is shared by several clients, such as an e-mail program. If the software is not shared, enter " N ". If it is shared, enter " P " or " S " for primary or secondary, respectively. Each shared program should be listed under each client who uses it. This field should be marked " S " for all but one client, who should be " P ". In reports, the software will be listed under each client, but will only be added to totals if the Shared field is "N" or "P".
Purch Date	Purchase date.

PO #	Puchase order number.
Price	Purchase price.
Vendor	Company the software was purchased from. The drop-down for this field accesses the vendor table.
Warranty	The length of the warranty period. Enter a number followed by " Y " (years), " M " (months) or " D " (days). For example, 1Y, 3M or 90D. If the purchase date has been filled in, the warranty period will be used to compute a default value for the next field, warranty expiration date.
Warranty Exp	Warranty expiration date. A default value is computed if Purchase Date and Warranty fields contain data.
Service Code	Identifies the company which is responsible for maintaining the software. The drop-down list accesses the Service Company table.
Svc Expires	The date the maintenance contract on this software expires. Reports can be generated giving you advance notice of when warranties and service contracts expire.
Lic. Starts	The license starting date. This field and the license ending date below are intended to help you monitor your use of evaluation software.
Lic. Ends	License ending date.
Depreciate	Check this box if the value of this software is depreciated over time.
Curr. Value	The current (depreciated) value of the software.

<u>B</u>rowse

While entering data into the software window, you can click the Browse button to access the software table. The table can contain the basic descriptions of software that is widely used by your clients, thus speeding data entry.

Software Table - 13 found				
Туре	Manufacturer	Product Name	t	
CUSTOM	Coastal Technologies	CitiShip		<u> </u>
DATABASE	Borland	Paradox		
ENVIRONMENT	Microsoft	Windows		<u>P</u> rint
GRAPHICS	Z-SOFT	PhotoFinish		Cancol
HD	Coastal Technologies	HELP!Desk		
HELP DESK	Coastal Technologies	HELP!Desk		
OS	Microsoft	MS-DOS		
PIM	Chronologic	Instant Recall		
REPORT WRITER	Concentric Data	R&R		
SHELL	Symantec	Norton Desktop		
SPREADSHEET	Lotus	1-2-3	-	
			+	
		-		

The Software Table contains type, manufacturer, product name, version, price and warranty fields. Click **OK** to load the selected table entry into your software window.

The **Print** button prints a list of all entries in the table, while **Cancel** closes the table without updating your software window.

<u>D</u>elete

Click this button to delete the highlighted piece of software.

<u>M</u>ove

The Move button will take an unlinked (house inventory) item and link it to the client shown in the Client or Profile window. This button is disabled unless there is an open client or profile window and the current inventory item is unlinked.

<u>U</u>nlink

The Unlink button allows you to move the selected piece of software to another client or to house inventory. If you are moving to another client and that client has multiple configurations, you will be further prompted to select the desired configuration.

<u>H</u>elp

Click this button to access help.

<u>C</u>ancel

Click this button to close the software selection window.

Network messaging Ait	тіј
Email Alt	+F2

Communications, Network Messaging (Alt+F3)



This option allows you to send messages across a Novell network. You can send messages to a single LAN user, multiple users, or groups. Since this function uses Netware's built-in messaging capability, the recipient of your message does not need to be running HELP!Desk. Group conferencing between HELP!Desk users adds an extra degree of functionality, enabling your team to communicate effectively across the LAN.

When this option is selected, the Messages window will open.

-	Message	S	
Message: What are we doing for lunch?			
Groups: 🛛 🔀 Include Sender's Name	<u>U</u> sers:	Show <u>F</u> ull Names	
😂 EVERYONE	2 🕨 🚨	FRANK	Send
Se THE_GANG	5 🚨	KEITH	
STECH_STAFF	3 🚨	MAIREAD	Cancel
SANDY_&_MAIREAD	1 🚨	NOT-LOGGED-IN	
Be PROGRAMMERS	4 🚨	PETER	<u>C</u> lose
Begin C <u>o</u> nference	Ser <u>v</u> ers: [[T1 👤	

Functional areas of the window

Message	This is where you type your message. Up to 47 characters can be sent at a time.
Groups	You can select one or more groups to receive your message. All members of a selected group who are logged into the network will be recipients.
Include Sender's Name	If checked, your name will be included with the message. To send anonymously, uncheck this box.
Users	This list contains the name of all currently logged-in users. You may select one or more people to receive your message. The triangle pointer appears next to the name of the person who is logged into the network at this workstation.
Show Full Names	If this box is checked, the User list will show full names, otherwise it shows log-in names.
Servers	This drop-down allows you to select which server you will send the message to. Only people logged into the selected server can receive your message.



Click this button to send your message.

The receipt of messages can be blocked by the Netware command **CAST OFF** or through options in Windows and OS/2. If a user has disabled message reception, HELP!Desk cannot override that setting.

Begin Conference

This button allows you to have a conference with one or more HELP!Desk users. Conferencing can be very useful when you need to ask a quick question of another technician. A conference normally begins with one user clicking the **Begin Conference** button, then sending a message to someone asking him or her to do the same. This action will enlarge the Messaging window do display each message as it is sent or received.

FRANK [2]: Do you know how to convert WP6 into RTF? KEITH [5]: Yes, there is a SAVE AS option. FRANK [2]: OK, thanks

If the window fills, a scroll bar will appear allowing you to view the entire thread of conversation.

Communications, Email (Alt+F2)

This option allows you to send e-mail across a MAPI-compliant electronic mail system.

🛥 Mapi Mail - Send E-Mail	
Address tinab@nuwave.com imab@nuwave.com • Client Ms. Tina Baccardi tinab@nuwave.com imab@nuwave.com • Technician * imab@nuwave.com imab@nuwave.com	¥.
<u>S</u> ubject	
Call # 140934	
Message	
We received your database files. As suspected, the file header is damaged on two of them. We are attempting to reconstruct them at this time. I contact you when we have a	+ +
Status	
Request Receipt Send Mail Close Help	

Functional areas of the window

Address	Radio buttons allow you to select either a technician or client as the recipient. The technician name is selected from the drop-down. If you choose client, a search window will open allowing you to find the desired client. Once your recipient has been identified, you can select the address from the remaining drop-down. E-mail addresses are entered from the client window, or for technicians, from the security window.	
Subject	Enter the subject of the message.	
Message	Enter the text of the message. This area will scroll as you type.	
Status	This area is used for status messages after you click the Send Mail button.	
Request Receipt	Check this box to receive notification after the message is delivered.	

Once all information is entered, click Send Mail to post the message.

The REPORTS Menu

Call Reports Inventory Reports Referral Reporting	Client Reports	≯
Inventory Reports Referral Reporting	Call Reports	≯
Referral Reporting	Inventory Reports	∢
	Referral Reporting	
Survey Reporting	Survey Reporting	

Reports, Client Reports

This selection opens a submenu listing the following client reports:

Client List Client Address Cards designed to print on Avery 5385 rotary cards Client Phone List Client Summary

Reports, Call Reports

This selection opens a submenu of call reports. Some selections open an additional submenu.

Call Detail

These reports print the full text of the call including problem and resolution. Call Detail Call Detail with Activities

Call List

This report lists calls, but excludes the text of the problem and resolution.

Call Duration

These selections report the time spent actually working on a call.

Call Duration Call Statistics by Client Call Duration Summary by Account Call Duration Summary by Category

Call Days to Close

These reports count the number of days between opening and closing calls.

Days to Close Summary Call Days to Close Statistics Call Count by Days until Closed Days to Close Summary by Account Days to Close Summary by Category

Call Activity Summary

This report provides a summary of the number of calls that were opened or closed within a specified time period.

Call Count per Month

This report counts the number of calls that were opened by month for a twelve month period.

Phone Support Charges per Month

This report shows the total charges of all call per month for a twelve month period.

Call Response Time Report

This report shows time elapsed between the assignment of a call and acknowledgment by the receiving technician.

Average Response Time Report

This report lists average call response time by technician for a specified time period.

Reports, Inventory Reports

This selection opens a submenu of inventory reports.

Hardware by Account

Lists hardware by account number.

Hardware by Department

Lists hardware by department.

Hardware by Warranty Expires

This report is allows you to track the warranty expiration dates of equipment so that you may make arrangements to have the equipment placed under a service contract.

Hardware by Service Expires

This report helps you plan service contract renewals.

Hardware Listing

This general listing may be generated for a single account or all.

Hardware by Product

Lists hardware by product.

Hardware by Vendor

This report lists hardware by vendor and can be useful in negotiating volume discounts.

Hardware by Service Company

This report shows all hardware covered by a specific service company.

Hardware by Configuration

Lists hardware by configuration.

Software by Account

Lists software by account number.

Software by Department

Lists software by department.

Software by Warranty Expires

This report is allows you to track the warranty expiration dates of software so that you may make arrangements to purchase extended warranties or maintenance contracts.

Software by Service Expires

This report helps you plan service contract renewals.

Software Listing

This general listing may be generated for a single account or all.

Software by Product

Lists software by product.

Software by Vendor

This report lists software by vendor and can be useful in negotiating volume discounts.

Software by Service Company

This report shows all software covered by a specific service company.

Software by Configuration

Lists software by configuration.

Reports, Referral Reporting

This report lists calls with referrals and can be directed to include only referrals to a specific group or department.

Reports, Survey Reporting

This report lists calls with customer satisfaction survey results. It is used by management to gauge overall customer satisfaction and can be the basis for changes in training, staffing, etc.

General Reporting Information

The following information provides a general description of reporting.

When a report is selected, the Print Options window opens allowing you to specify report destination and limiting criteria for selecting the data that will be reported.

Print Options				
<u>OK</u> <u>S</u> etup	tup <u>C</u> ancel Call Detail Reports			
Order Calls by <gent Calls by Acct # Calls by Call D Calls by Client</gent 	eral> O # O ate O	Calls by Product Calls by Subject Calls by Technician Calls by Priority	Destination Printer Screen	
Exact Match Call Date When Last Update	00/00/00) to 00/00/00 [1] to 00/00/00 [1] to 00/00/00 [1]	Client Criteria Single Client All Clients Unassigned Only All Calls	
 Status Category Product Subject Technician Acct # Priority Res. Code 			Calls Status Selection Show OPEN Calls Show PENDING Calls Show CLOSED Calls Calls w/o Satisfaction Survey Calls w/ Satisfaction Survey	

Each report's Print Options will be slightly different, but can be generally described as having one or more of the following functional areas:

Buttons		
	OK Setup Cancel	Click this button to generate the report. Opens the Windows printer setup dialog, allowing you to select a printer. Closes the Print Options window without generating a report.
Order		The radio buttons in this section allow you to select the order in which data will be reported. Some reports have a predefined order and consequently do not show this option.
Destina	tion	All reports may be directed to the screen or to a printer. The screen preview contains a Print button which allows you to print the report after you have viewed it.
Filterin	g Criteria	This section allows you to limit the information that will be included on the report. Click the checkbox and enter criteria for each field you want to use to limit the report.
		For a character field such as Product , the filter attempts to match only the characters you typed, as a substring of the data. For example, if you enter LASERJET II as your criteria, the report would include both LASERJET II and LASERJET III . If you want only exact matched to your criteria, check the Exact Match checkbox.
Client (Criteria	These radio buttons control the scope of data under consideration for the report. If you choose a single client, your will be prompted to select the client through the Client Search routines.
Call Sta	tus Selection	These checkboxes further refine the scope of data that will be included on the report.

Some reports, such as the Referral report, use a smaller criteria window with fewer options. An example is shown below.

Referral Report Criteria				
☐ Date <u>R</u> eferred:	00/00/00 🔟 to 00/00/00 🔟	Destination		
🗖 <u>C</u> all Date:	00/00/00 🗐 to 00/00/00 🗐	 Printer Screen 		
Close Da <u>t</u> e	00/00/00 🖽 to 00/00/00 🖽	() Screen		
Referred To:	<u>±</u>	<u>O</u> K <u>C</u> ancel		

As elsewhere in HELP!Desk, the calendar pop-up can be used to enter dates. Tables are accessible from all fields with a drop-down list, such as **Referred To** above.

When a report is directed to the screen, it is displayed in a window similar to the one shown below.

•			Call	Duration b	y Category		▼ ▲
	Print	<u>Z</u> oom	<u>S</u> etup	<u>H</u> elp	E <u>x</u> it		
			Ca	II Duration	by Category		
Γ							+
	Page 1 of 1					Ca	oastal Techni
	05/03/95					End	-User Suppor
						All Calls:	Call Date: 1/1
			Catego	ж		#Call	Average
			Catego <unass< td=""><th>ory signed Categol</th><td>y</td><td># Call 102</td><td>Average</td></unass<>	ory signed Categol	y	# Call 102	Average
			Catego <unase COPIER</unase 	o ry signed Catego. S	y	# Call 102 8	Average
			Catego <unass COPIER</unass 	ory signed Catego S	y	# Call 102 8 1	Average
			Catego <unass COPIER</unass 	bry signed Catego IS	'Y	# Call 102 8 1 1	Average
			Catego <unass COPIER HARDV</unass 	ory signed Catego S VARE	γ	#Call 102 8 1 1 1 15	Average
			Catego <unase COPIER HARDV INFORM</unase 	ory Signed Catego S VARE MATION	γ	# Call 102 8 1 1 1 55	Average
			Catego <unass COPIER HARDV INFORM OTHER</unass 	ory signed Catego S VARE MATION	'n	# Call 102 8 1 1 1 50 2	Average

Description of buttons

Default Label	Description
Print	This button will print the report you are previewing.
Zoom	Allows you to enlarge or reduce the image. <i>Any changes in the zoom setting affect the size of the printed image.</i> The report is repaginated whenever the zoom setting is changed or the window is resized.
Setup	Access the Windows Printer Setup dialog box.
Help	Click this button to access the help system.
Exit	Closes the report window.

Use **Page Up** and **Page Down** to view different pages of the report. The **scroll bar** moves the viewport on the current page.

The UTILITIES	Menu
---------------	------

Solutions	•
Pack & Reindex	Ctrl+Alt+F1
Training	Ctrl+T
Bulletin Board	Ctrl+B
Ticklers	
NetCensus® Import	
Table Maintenance	•
Security	

Utilities, Solutions

This option opens a submenu which allows complete access to all functions of the knowledgebase / solutions module.

<u>F</u> ind Solutions	Ctrl+S
Browse Solutions	
Append New Solutions	
⊻iew Graphics	Ctrl+G
Modify Graphics Database	
<u>R</u> ebuild Solutions Index	

Utilities, Solutions, Find Solutions (Ctrl+S or 🔎)

Choose this option to open the solutions search window, pictured below.

1	Solutions Search
Search Text:	keyboard
	Use search text as a phrase
Se	arch <u>C</u> ancel <u>H</u> elp

Enter the words or phrase you are looking for. By default, any matching record will contain all of the words you enter, in any order. If the **Use search text as a phrase** box is checked, then the phrase must exactly match text in the solution to be considered a match.

If one or more matches are found, the Solutions window will open showing the first match. The number of matches is indicated at the top of the window, with counters for text and graphics. The buttons and fields are described below.

•	Solutions	▼ ▲
Matches Text: 10	Graphics/Animation: 1	Add
Call Date:	10/08/93 III Time of Call: 10:21	Edit
Category:	S 🖭 SOFTWARE	<u>D</u> elete
Subject:	OS/2 Error	<u>N</u> ext
Product:	HELP!Desk 2.0	Previous
Res. Code:	Modified DOS/WIN Configuratio	Search
Technician:	FRANK Date Added: 05/05/95	Browse
Solution:	Running HELP!Desk 2.0 under OS/2, user got the error message SYS 2237, which has something to do with the DOS kernal. To solve the problem, SET HELPDESK=/CX0,100%/OU0/OP0 If that works, you may want to have the customer remove one or more of the parameters. If there is a problem shelling out, SET SHELLBY=OVERLAY.	<u>G</u> raphic <u>H</u> elp E <u>x</u> it Record:
1		10/10

Solutions Window - Button Descriptions

Default Button Label	Description	
Add	Manually create a new solution. Solution text may be typed or pasted from the Windows clipboard.	
Edit	Edit the current solution.	
Delete	Delete the current solution.	
Next	Display the next solution. The Record indicator shows your relative position within the retrieval set of matching records.	
Previous	Display the previous solution.	
Search	Enter new key words to search again. You may want to add to your original criteria if the number of matches is too large to be practical.	
Browse	Browse through the solutions or images that meet your search criteria. You will be prompted to select the type of matches you want to peruse. Select Items to Browse Solutions Graphics Cancel	
Graphic	Display the next graphic image that meets your search criteria.	
Help	Display the Help window.	

Solutions Window - Field Descriptions

Default Field Label	Description
Call Date	The date of the call (if the solution was created from a call).
Time of Call	The call time.
Category	The category of the problem.
Subject	Subject of the problem / solution.
Product	Product which is related to the problem.
Technician	The technician who entered the solution or resolved the call.
Date Added:	The date the solution was added to the Solutions database.
Solution	The text of the problem and solution. If the solution is from a call, this field is the combination of the call's "Problem" and "Resolution" fields.

Utilities, Solutions, Browse Solutions

This option opens a selection window that lets you scroll through all of the solutions.

Browse Solutions			
Subject	Product	1	Add
Automatic Timing	BT2		
@ Formulas	APPLAUSE		<u>E</u> dit
Client Templates	HELP!Desk 2.06		View
Advertising	BT2		<u></u> lew
BETA REQUEST	HELP!Desk 2.0		<u>H</u> elp
Info	Eval 1.2	+	
+		•	Exit
		_	

Browse Solutions - Button Descriptions

Default Button Label	Description
Add	Click this button to manually add a solution. You can either type in text or paste existing text from the Windows clipboard.
Edit	Click to edit the currently highlighted solution.
View	Click to view the currently selected record.
Help	Open the help window.
Exit	Close the Browse Solutions window.

Utilities, Solutions, Append New Solutions

Use this option to copy information from designated closed calls into the Solutions database.

As calls are entered into the system, you can use the information in them to build a knowledgebase to help you solve future problems. To designate a call for inclusion into the Solutions file, enter "**Y**" in the field "**Add to solutions when closed?**".

What kinds of calls should be added?

Any call that contains valuable information that could be used to assist another technician in solving a future problem should be copied into the Solutions database. However, you should not include a new call if the answer to the problem was found in the Solutions file.

Adding call information into Solutions is a two-step process. First, the call must be marked for inclusion in the Solutions database. Then, you must use this menu option to append the call information into Solutions.

Utilities, Solutions, View Graphics (Ctrl+G)

This option allows you to browse through the list of images that have been identified to the HELP!Desk solutions module. (Images are added by selecting **Modify Graphics Database**, described below.)

Click the **View** button to see the selected image. Click **Exit** to close the window.

Utilities, Solutions, Modify Graphics Database

This option allows you to identify images to the HELP!Desk solutions module. This is done by entering key words, descriptions and filenames. HELP!Desk can display the following image types: BMP (bitmap), GIF, PCX, TIFF, TARGA and DCX (fax format).

•	Modify Graphics Database		
Key Word	Description	6	Add
PC BOARD	ISA Peripheral Board	ISA	
PC BOARD 3	VLB Peripheral Board	VL	Edit
			<u>D</u> elete
			Exit
+		+	

The Add and Edit buttons open the Modify Image Record window, explained below.

Modify Image Record			
Key Word:	PC BOARD		<u>S</u> ave
Description:	ISA Peripheral Board		<u>C</u> ancel
Image File:	ISAPB.BMP	Browse	
Chain To:	VLB.BMP	Browse	

Description of fields

Default Field Label	Description
Key Word	A key word or phrase describing the image. Both this field and the "Description" field are included when searching for a solution.
Description	A description of the image.
Image File	The file name of the image. All images must reside in the directory pointed to by the PictureDir setting in HDWIN.INI . [General] PictureDir= <i>directory name</i>
Chain To	<i>Optional.</i> If a file name is entered here, this image will be displayed after the image above. By chaining images, you can show a series of pictures to explain a complex task or subject.

The Browse Button

Click this button to select a file. You will first be prompted to select the image type.



-	Select Image	File	
lm R:	Images Directory: R:\Develop\HD\WIN\DBASE\		
s s s ti ti tr	oftware.bmp plash.bmp plash2.bmp urvdone.bmp urvey.bmp w-prof.bmp ckler.bmp ckler2.bmp reeamp.bmp	<u>O</u> K <u>C</u> ancel	
You will then be prompted to select a file. The directory is set in the HDWIN.INI file. If no settings exists, the default is the database directory.

Utilities, Solutions, Rebuild Solutions Index

This function allows you to reconstruct the special text searching indices that are used by the Solutions module. If you have a large number of solutions, this function may take a few minutes. A progress bar will show the status of reindexing. The final 1% will take the longest, as that is when the new index is written back to the disk.

Utilities, Pack & Reindex (Ctrl+Alt+F1)

This option allows you to rebuild the index files that HELP!Desk uses to speed data retrieval. Packing physically removes deleted records from the databases.

😑 🛛 🚽 Pack & Reind	lex Databases
 Index All Files Select Files to Index Client File Calls File Software File Hardware File 	☐ <u>T</u> ables File ☐ Acti <u>v</u> ities File ☐ Tic <u>k</u> lers File ☐ Configurations File
Pass <u>w</u> ords File	Phone File
1	
<u>Pack Data Files</u> <u>Index</u>	<u>C</u> ancel

You can index all files or click **Select Files to Index** and check individual files. If **Pack Data Files** is checked, then the selected files will be reindexed and packed. A progress bar is shown to indicate the reindexing status.

No other users can access the HELP!Desk files when reindexing.

Utilities, Training (Ctrl+T or

This option allows you to view, add or edit training schedules. Use this option if your group is responsible for recommending training to your clients. Since HELP!Desk allows you to store an unlimited number of schedules, you have complete flexibility in categorizing your entries. You may want to enter a schedule for each category of classes, such as Word Processing or Database, or you may choose to enter separate schedules for in-house classes and authorized third-party seminars.

Select Training S	Schedule - 2	found	▼ ▲
Subject	Last Update	Author	Add
Spreadsheet Training	01/20/95 01/19/95	FRANK	<u> </u>
			View
			<u>D</u> elete
			<u>H</u> elp
			E <u>x</u> it

If Add, Edit or View is selected, the Training Schedule window will open.

Training Schedule - Field Descriptions

Default Field Label	Description
Author	The name of the person who created this training schedule. It is filled in automatically and cannot be edited.
Last Update	The date this schedule was last modified. This field is maintained by HELP!Desk and cannot be edited.
Subject	The subject of this training schedule.
(no label)	This is a free-form text entry field where you would enter the schedule and any associated comments. Up to 64,000 characters may be entered here.
Allow updates by others	If this field is checked, then anyone with training schedule editing privileges will be allowed to modify this record. If unchecked, then only the author and users with supervisory privileges will be able to edit or delete it.

Utilities, Bulletin Board (Ctrl+B or 🔯)

This option allows you to view, add or edit bulletins. Use this option to disseminate information to other HELP!Desk users. Since HELP!Desk supports an unlimited number of bulletins, you have complete flexibility in creating bulletins to suit your needs. You may want to create bulletins for weekly or monthly work schedules, project deadlines, upcoming special events, or the solution to a particularly unusual problem. A special bulletin referred to as the System Bulletin, can be automatically shown to each user upon startup of HELP!Desk. To determine if the System Bulletin will be displayed upon startup, select **File, Preferences, Program Defaults** from the menu bar.

🛥 Sel	ect Bulletin - 2 foun	d	
Subject ** Important Notice **	Last Update 05/03/95	<mark>Author</mark> FRANK	Add
Softball Schedule	05/03/95	BILLY BOB	<u>E</u> dit
			<u>V</u> iew
			<u>D</u> elete
			<u>H</u> elp E <u>x</u> it

If Add, Edit or View is selected, the Bulletin window will open.

		Bulletin	
Author F Last Update D Subject **	RANK 5/03/95 * Important Notice	Allow updates by others	<u>S</u> ave Paste
We have been re problems retrievi seems both the Ctrl+F2 to retriev	eceiving a large nu ng customer inforr manual and the or ve information. Th	mber of calls from users who are having mation from our new ordering system. It n-line help are incorrect, specifying e correct sequence is Alt+F2.	<u>H</u> elp <u>P</u> rint <u>C</u> ancel

Bulletin - Field Descriptions

Default Field Label	Description
Author	The name of the person who created this bulletin. It is filled in automatically and cannot be edited.
Last Update	The date this bulletin was last modified. This field is maintained by HELP!Desk and cannot be edited.
Subject	The subject of this bulletin. If the subject begins with double asterisk ("***"), then the bulletin is considered the System Bulletin. (If more than one bulletin has a subject beginning with double asterisk, then the one that is alphabetically first will be the System Bulletin.)
(no label)	This is a free-form text entry field where you would enter the text of the bulletin or message. Up to 64,000 characters may be entered here.

Allow updates by others	If this field is checked, then anyone with bulletin editing privileges will be allowed to modify this record. If unchecked, then only the author and users with supervisory privileges will be able to edit or delete it.
-------------------------	--

Utilities, Ticklers

This option allows you to view, add or edit ticklers. Ticklers are reminders that you can use to notify yourself or someone else of an important event. The **HDALERT** program must be running in the background for you to receive notification.

Some ticklers are be generated automatically by HELP!Desk when certain events occur, such as reassigning a call to another technician.

List of Ticklers - 3 found				
List	List of Ticklers For FRANK			
Event Date	Event Time	Tech Name	Event Description	Add
04/26/95	04:00 pm	FRANK	Call #15020318 Return c	Edd
04/27/95	11:01 am	FRANK	Call John Simms about he	Εακ
04/26/95	04:00 pm	FRANK	Call# 15020318	<u>D</u> elete
				<u>P</u> rint
				Help
+			+	E <u>x</u> it
Technician FRANK				
Event Date: 04/26/95 Event Time: 04:00 pm				
Event Description: Call #15020318 Return call				

Tickler Window - Field Descriptions

Default Field Label	Description
List of Ticklers For	This drop-down allows you choose whose ticklers will be listed. Unless you have "Tickle Supervisory" rights, you can only view your own ticklers.
Technician	The recipient of the tickler.
Event Date	The day the tickler is due.
Event Time	The time the tickler is due.
Event Description	The reason for the tickler.

Utilities, NetCensus® Import

This menu option allows you to import inventory and client information from Tally Systems' PC Census and NetCensus programs.

For information on PC Census or NetCensus, contact Tally Systems Corporation at 603 643-1300, fax 603 643-9366 or visit www.tallysystems.com.

After selecting this option, you will be prompted to choose the method for importing data.

Select NetCensus® Import Mode		
• Add NEW client/inventory from NetCensus® files		
Replace HELP!Desk inventory with NetCensus® data		
Combine existing inventory with NetCensus® data		
<u>O</u> K <u>Cancel</u>		

Description of Options

Add	Clients and inventory information are imported from PC Census or NetCensus for any clients not already found in the HELP!Desk database.
Replace	New records are added as above. Existing clients' inventory records are replaced with the PC Census or NetCensus inventory information.
Combine	New clients are added as above. For existing clients, PC Census or NetCensus inventory information is added to the HELP!Desk inventory. <i>If you were to run this option twice, each client's inventory would be duplicated.</i>

After you click **OK**, you will be prompted to identify the location of the PC Census or NetCensus databases.

Select the NetCensus Data Directory				
File <u>N</u> ame: compon.dbf assettag.dbf choice.dbf class.dbf compon.dbf config.dbf dlabels.dbf dlabels.dbf doserrs.dbf errors.dbf	Directories: r:\apps\netcen r:\ apps netcen collect dos env	Canc	el	
List Files of <u>Type:</u> All Files (*.*) File Description:	Dri <u>v</u> es:	File Information: 6,276 10/14/93 12:43 PM	I	
View Find MakeDir Renar	me Delete Config		leAssist	

Use the file selection dialog to select the NetCensus or PC Census data directory. Choose any file in the directory and click **OK**.

HELP!Desk will establish an ODBC connection to the databases, then begin importing the data. *The import function copies information into the HELP!Desk files. No changes of any kind are made to the PC Census or NetCensus databases.*

Utilities, Table Maintenance

These options allow you to edit the table entries that are displayed in the drop down lists that accompany many fields. When this option is chosen, a submenu will display prompting you to make a further selection.

Field Tables
Hardware
Software
Vendor
Service Companies

Utilities, Table Maintenance, Field Tables

This option opens a selection/edit window that provides access to the majority of the HELP!Desk tables.

•	Table M	aintenance	▼ ▲	
	Choose table to modify Category			
Code	Description	Secondary	t bbA	
С	COPIERS	COPIER		
н	HARDWARE	HARDWR	<u>E</u> dit	
I	INFORMATION	INFO	Delete	
0	OTHER	OTHER	Delete	
S	SOFTWARE	SOFTWR		
Т	TRAINING	TRAIN	<u>H</u> elp	
тс	TELECOM	PHONES	E <u>x</u> it	

From this window you would select the table from the drop down, **Choose table to modify**. The options in the list mirror the field labels you have configured in **File**, **Preferences**, **Screen Design**.

Each table gives you access to one of the situations described below:

Visible Columns	Explanation
Description	The entry in the table is used to fill or validate the corresponding field in a window.
Code and Description	The entry in the "Code" field is used to fill or validate the corresponding field in a window. The "Description" field is shown to remind you of the meaning of the "Code".

Code, Description and Secondary	The entry in the "Code" field is used to fill or validate the corresponding field in a window. The "Description" field is shown to remind you of the meaning of the "Code". In the "Category" table, "Secondary" is used to hold an abbreviation of the description that will be displayed on some reports. For the "Status" table, "Secondary" must be "C", "O" or "P", indicating Closed, Open and Pending respectively. These values are used by HELP!Desk to determine the actual status of a call, regardless of the codes you create in
	a call, regardless of the codes you create in the "Code" field.

Utilities, Table Maintenance, Hardware

Choose this option to make changes to the Hardware table. This table is accessed by the **Browse** button on the Hardware Entry window.

= Hardware Table 🔽 🔺			
Туре	Brand	Model	• Add
CD-ROM	Sony	CD2X4700	
COMPUTER	Gateway 2000	486DX2/66	Ear
COMPUTER	IBM	ThinkPad 750C	Delete
HARD DISK	Seagate	ST4031	
HARD DISK	Seagate	ST5983	<u>H</u> elp
+		•	E <u>x</u> it
Type: Cl	D-ROM	Brand: Sony	
Model: Cl	D2X4700	Curr. Value:	
Warranty:			
Description: 2>	CD-ROM drive (inter	nal)	

The upper portion of the window allows you to scroll through all entries, while the lower portion is used to add a new entry or edit the highlighted one.

Utilities, Table Maintenance, Software

Choose this option to make changes to the Software table. This is the table that is accessed by the **Browse** button on the Software Entry window.

•	Software	Table		✓ ▲
Туре	Manufacturer	Product Name	±	Add
DATABASE	Borland	Paradox		Edit
ENVIRONMENT	Microsoft	Windows		
HELP DESK	Coastal Technologies	HELP!Desk		<u>D</u> elete
os	Microsoft	MS-DOS		Holp
PIM	Chronologic	Instant Recall	-	<u> </u>
•		+		E <u>x</u> it
Type:	HELP DESK	Manufacturer: Coas	stal T	echnologies
Product Name:	HELP!Desk	Version: 3.0 fo	or Wi	ndows
Curr. Value:	1,995.00	Warranty: 30 da	ays	
Description:			[

The upper portion of the window allows you to scroll through all entries, while the lower portion is used to add a new entry or edit the highlighted one.

Utilities, Table Maintenance, Vendor

This option is used to edit entries in the Vendor table. This table is accessed from dropdowns on the Hardware and Software entry windows.

•	Vendor Tat	ole	✓ ▲
Vendor		Address 1	Add
Coastal Technolo	gies	615 Valley Ro	Edit
			<u>D</u> elete
			Help
			E <u>x</u> it
		•	
Vendor:	СТІ		
Vendor:	Coastal Technologies		
Address 1:	615 Valley Road		
Address 2:	Montclair, NJ 07043-1403		
Address 3:			
Phone:	201 744-2900		
Contact:	Grant		
Account #	COASTA011		
Products:	HELP!Desk, Custom Applica	tions, Training	
Comments:			

Vendor Table - Description of Fields

Default Field Label	Description
Vendor	Vendor code.
Vendor	Company name.
Address1 thru Address3	Mailing address.
Phone	Telephone number.
Contact	Contact name.
Account #	Account number.
Products	Products sold by or purchased from this vendor.
Comments	Any additional notes such as fax number.

Utilities, Table Maintenance, Service Companies

This option is used to edit entries in the Service Companies table. This table is accessed from drop-downs on the Hardware and Software entry windows.

•	Service Table	▲
Vendor V	endor	Add
XEROX Xe	erox Corporation	Edit
CTI Co	bastal Technologies	
SELF Se	elf-Maintained	Delete
		<u>H</u> elp
		Exit
	→	
Vendor	: XEROX	
Vendor	: Xerox Corporation	
Address 1	: 425 Research Drive	
Address 2	Palo Alto, CA 95215	
Address 3	:	
Phone	415 555-3092	
Contact	George Stefanapoulos	
Account #	tE3984	
Products	PCs, copiers	
Comments	:	

Service Table - Description of Fields

Default Field Label	Description
Vendor	Vendor code.
Vendor	Company name.
Address1 thru Address3	Mailing address.
Phone	Telephone number.
Contact	Contact name.
Account #	Account number.
Products	Products sold by or purchased from this vendor.
Comments	Any additional notes such as fax number.

Utilities, Security

This option allows you to build the database of authorized users of the HELP!Desk software and set each person's individual access rights.

٩	Security	▼ ▲
Select User N	ame:	
Name: PETE	Password:	Aild
LAN Name: PETER		Save
Mail Addr: peteb@attmail@upitt.ed	u	Delete
🗖 Supervisor	Field Validation: 2 重	Соду
Bulletins	Access	E <u>m</u> ail
Client Field Labels	Delete Edit	Phone
Inventory Reporting	Reopen Supervisory	<u>H</u> elp
Security (Users/Passwords)	Time Stamp Highlight to permit access	<u>C</u> ancel

Security Window - Drop Down and Buttons

Default Label	Description
Select User Name	This drop down allows you to select an existing user to view, Edit or Delete .
Add	Click to add a new user.
Edit	Edit the currently selected user.
Delete	Delete the current user.
Сору	Duplicate the current user record, excluding name and password. This feature enables you to quickly create users who have similar access rights.
Email	Enter e-mail addresses for the current user. The window that opens is identical the to Client window's e-mail addresses.
Phone	Enter phone, fax, pager and modem numbers for this user.
Help	Accesses the Help window.
Exit	Closes the Security window.

Security Window - Field Descriptions

Default Field Label	Description
Name	HELP!Desk login name. Should match or be matched by an entry in the Technician table.
Password	Password for logging into HELP!Desk. Unless you are editing this field, it will always display five asterisks. As you type, it will display one asterisk per character.
LAN Name	The name this person uses to log into the network.
Supervisor	If this box is checked, this user will have full access to every function in HELP!Desk. If unchecked, then the access rights described below will be in effect.
Field Validation	 This value is used to control data validation on fields with drop-downs. Valid values are N, 1, 2 and 3. N No validation is performed. Any entered value will be accepted. 1 If the entered value does not exist in the corresponding table, it will be added automatically. <i>This option is not recommended, because mistyped words and inconsisten entries will clutter the table.</i> 2 If the entered value does not exist in the table, you will be notified and have the option of adding it to the table. <i>This is the best choice if you are building tables dynamically while you use HELP!Desk.</i> 3 The entered value must match an entry in the table. <i>Choose this option if you want to restrict data entry to values that have already been added to the tables.</i>

Setting Access Rights

Unless the user has been given Supervisor rights (by checking the **Supervisor** box above), access rights must be granted for each function the user should be able to perform.

Bulletins	 Access
Calls	Add
Client	Delete
Field Labels	Edit
Inventory	Reopen
Reporting	Supervisory
Security (Users/Passwords)	🛨 🛛 Time Stamp 💽 🛃
Select category	Highlight to permit access

First, select a category in the left window. The right window will then be loaded with permissions that may be granted for that category. Click to highlight the permissions you wish to grant. Repeat these steps for each category. Clicking a highlighted item de-selects it and revokes the permission.

Description of Categories and Permissions

Category	Permission	Description
Bulletins	Access	If not granted, the user will not be able to access the bulletin module, regardless of other settings in this category.
	Author	User can create new bulletins and edit bulletins that have been flagged "editable by others".
	Delete	User can delete his or her own bulletins, and bulletins that have been flagged "editable by others".
	Supervisory	User can edit or delete any bulletin.
Calls	Access	If not granted, the user will not be able to access calls, regardless of other settings in this category.
	Add	Add new calls.
	Delete	Delete existing calls.
	Edit	Edit open calls.
	Reopen	Reopen (edit) closed calls.
	Supervisory	From the Open Calls window, view open calls for other technicians.
	Time Stamp	Edit the time stamp on calls and activities.
Client	Access	If not granted, the user will not be able to access clients, regardless of other settings in this category.
	Add	Add clients.
	Delete	Delete clients.
	Edit	Edit client information.
	Supervisory	Not used.
Field Labels	Access	Access the File, Preferences, Screen Design window.
	Global	Edit the global field labels.
	Personal	Create and edit personal field labels.

Inventory	Access	If not granted, the user will not be able to access inventory (configurations, hardware or software), regardless of other settings in this category.
	Add	Add new inventory.
	Delete	Delete existing inventory.
	Edit	Edit existing inventory.
	Supervisory	Copy software in the House Software window.
	Update House	Update (add/edit/delete) house inventory.
Reporting	Access	View and print any report. <i>This setting</i> does not affect printing a window. It only controls reports accessed from the Reports menu.
Security (Users/Passwords)	Access Add Delete Edit Supervisory	If not granted, the user will not be able to access the Security window, regardless of other settings in this category. Add new users. Delete existing users. Edit existing users. Copy existing users (using the Copy button).
Solutions	Access Add Delete Edit	If not granted, the user will not be able to access the Solutions window, regardless of other settings in this category. Manually add entries to the solutions database. Delete existing solutions. Edit existing solutions.

bles Access If not go to acc regard Add Add e	granted, the user will not be able cess Table Maintenance, dless of other settings in this ory. entries to tables.
Edit Edit et	e existing table entries. xisting table entries.
lities Archive Not in Global Update Not in Import/Export Not in Reindex Allows NetCensus Impor Censu Tickle View t	nplemented. nplemented. nplemented. s the user to rebuild index files. t data from NetCensus or PC us. ticklers for users other than
Tickle View t Supervisory yourse	us. tickl elf.

Note: Each user must be entered with a unique name, and if the user is a technician, places make ours the name is added to the

. Technician table. The following section details each of the major windows of HELP!Desk, in alphabetical order.

The ACTIVITIES Window

Accessed from the Call window.

Activities for Call #15020318					
Start Date S	tart Time	Activity	Technician	Priority	Add
04/26/95	03:24 pm	Returned call	FRANK	1	<u>E</u> dit
					<u>D</u> elete
					<u>R</u> eassign
					Help
+				+	<u>Ex</u> it
Start Date: 04/2	26/95	III Start Time: 03:24 pm			
End Date: 04/2	26/95 (End Time: 03:25 pm			
Duration: 1		Charge: \$.00	🗌 Auto Com	pute	
Activity: Retu	urned call	Technician	n: FRANK 👤	Priority:	
Status: F	<u>t</u>	Date: 04/26/95 11 04:00 pm	X Tickle		
Detail: Left	t message on	voice mail			

The Activities Window displays a list of all activities for the current call. The highlighted activity is shown in its entirety in the lower portion of the window. This is also where data entry takes place when an activity is added or edited.

Default Field Label	Description
Start Date	The starting date of the activity. It is automatically set to the system date and cannot be changed.
Start Time	The time the activity was created. It is set to the current system time and cannot be changed.
End Date and End Time	These fields are used to indicate when the activity was completed. If the fields are left blank, they will be set to the system date and time when you click the Save button.
Duration	The time spent performing the activity. If left blank, the elapsed time of the activity will be stored here.
Charge	The charge to the client for this activity.
Auto Compute	If checked, the charge will be computed automatically based on the duration , billing rate , billing increment and minimum charge per activity .
Activity	A brief description or purpose of the activity.
Technician	The name of the technician who performed the activity.
Priority	The priority of the call. Changes made here are reflected back in the call window.

Activities Window Field Descriptions

Status	The status of the call as of the completion of this activity. The call window is updated with this status.
Date	The date and time related to the status, such as when the call was closed or when a follow-up call should be made.
Tickle	If checked, a tickler will be generated for the technician named in the activity, with an event date and time corresponding to the status date above.
Detail	Up to 64,000 characters of text describing in detail the action that was taken in performing this activity.

ACTIVITIES WINDOW DULLON DESCRIPTIONS	Activities	Window	Button	Descriptions
---------------------------------------	------------	--------	--------	--------------

Default Button Label	Description
Add	Add a new activity.
Edit	Edit the selected activity.
Delete	Delete the selected activity upon confirmation.
Reassign	This generates a special activity to reassign the call to another technician. Image: Contract of the special activity to reassign the call to another technician. Image: Contract of the special activity to reassign the call to another technician. Image: Contract of the technician the call to reassign the call to another the special activity to reassign the call to another the special activity to reassign the call to another the special activity to reassign the call to another the special activity to reassign the call to another the special activity or status. If Tickle is checked, a tickler will be generated for the receiving technician.
Help	Opens the Help window.
Exit	Closes the Activities window.
Save	In add/edit mode, saves the current changes.
Save/Exit	In add/edit mode, saves the changes and closes the Activities window.
Cancel	In add/edit mode, cancels editing without saving the changes.

The CALL Window

Accessed from the Client window, Main Menu or Button Bar.

•	Ca	II # 15020318	▼ ▲
Time of Call:	09/26/94 🛛 🛐 02:57 pm	Client: Ms. Tina Baccardi	Add
Problem:	She was running Windows a tried to reboot, the root direct	nd her computer locked up. When she ory was trashed.	Edit Delete Search Goto <u>N</u> ext Previous
Category:	S 🛃 SOFTWARE	Last Update: 04/25/95	Acti <u>v</u> ities
Subject:	Corruptfiles	Technician: FRANK	Ca <u>l</u> ls
Product:	DOS	<u>±</u>	<u>£</u> ink
Priority:	1 💽 Mission Critical		Unlink
Resolution:	I had her create a boot disk fi with it. Drive C: was complet try copying Norton Disk Docto a series of error messages v machine was then able to bo	rom another PC and reboot her machine rely unrecognizable to DOS. I then had her or onto the floppy and then run NDD. It gave which it ultimately attempted to rectify. The pot from the hard disk, but most of the	<u>H</u> elp E <u>z</u> it
Res. Code:	Restored from Backup	±	
Status:		When: 09/26/94 🔟 03:30 pm	
Duration:	35	Charge: \$.00	
Addl Time:		Addi Chrg: \$.00	
RMA Number:	Add	to solutions when closed: N	
1 Referral		3 of 3 CLOSED 09/26/94 0330pm	

The Call Window shows all information for the call. We will describe each field first, then each of the buttons.

Call	Window	Field	Descri	ptions
------	--------	-------	--------	--------

Default Field Label	Description			
Time of Call	The date and time of the call. These two fields are pre-filled with the system date and time. The calendar button allows you to select a date using your mouse.			
Client	If the call is linked to a client, the client's name is displayed here. When adding a call, the call is automatically linked if the client or profile window is open. An unlinked call is indicated by the message "< <i>not linked</i> >".			
Problem	Up to 64,000 characters of text describing the problem.			
Category	The problem category. A drop-down table exists for this field to validate the data.			

Last Update	This date is maintained automatically by HELP!Desk. It is updated each time the call is modified.	
Subject	The subject of the call. A drop-down table exists for this field to validate the data and ensure consistent data entry.	
Product	The product that the client is having a problem with. A drop- down table exists for this field to validate the data and ensure consistent data entry.	
Technician	The technician who is responsible for the call. This default for this field is the name of the current HELP!Desk user. A drop-down table exists for this field to validate the data and ensure consistent data entry.	
Priority	The priority of the call. The initial value of this field is taken from the client's priority field. A drop-down table exists for this field to validate the data and ensure consistent data entry.	
Resolution	Up to 64,000 characters of text describing the resolution of the call.	
Res. Code	The resolution code is used to categorize the way in which each problem was resolved. A drop-down table exists for this field to validate the data and ensure consistent data entry.	
Status	The current status of the call. Some entries in this field will pre-fill the "When" date and time, and also generate network messages and ticklers. A drop-down table exists for this field to validate the data and ensure consistent data entry.	
When	This is the action date/time for the "Status" field. It is used to indicate when a call was closed or when follow-up or other activity should occur.	
Duration	The time taken to resolve the call. This is the actual time spent working on the problem, not the elapsed time between when a call was opened and when it was closed. The duration is always displayed in minutes, but can be entered in days, hours and/or minutes. For example, 1 day, 2 hours and 35 minutes would be entered as 1D2H35M . The program default Number of work hours in day is used to convert the "day" entry into hours.	
	Duration is accumulated automatically as long as the call remains in edit mode.	
Charge	The charge can be entered manually or computed automatically. If computed, its value is determined by the duration , the client's minimum charge per call , and the program default billing rate , billing increment , minimum charge per call and minimum charge per activity .	
Addl Time	Any additional time that needs to be tracked, such as time charged by an outside repair firm or consultant.	
Addl Charge	Any additional charges that need to be applied against this call, such as a repair bill from a service company.	

RMA Number	A Return Materials Authorization Number that can be assigned if the client needs to return merchandise.
Add to Solutions when closed	If " Y " is entered here, this call will be marked for inclusion into the Solutions database. Only calls that have been added to the Solutions database can be found when performing a key word search in the Solutions module.

Call Window Buttons



		*
_	or	

The Add button allows you to add a new call. If the client or profile window is still open, the new call will automatically be linked to the client. The call date and time will default to the system date and time, and the assigned technician will default to the currently logged-in user.

Edit

Click this button to make changes to the current call. If the call is open, then the duration will continue to accumulate while you are in edit mode.

<u>D</u>elete

Click this button to delete the call. You will be prompted to confirm your command.

<u>S</u>earch

This option allows you to search for calls.

<u>G</u>oto

The Goto button allows you to quickly retrieve a single call by call number (also called work order number). Simply enter the number of the desired call and click **OK**.

<u>N</u>ezt

The Next button takes you to the next call in the retrieval set.

Previous

Previous takes you to the preceding call in the retrieval set.

Acti<u>v</u>ities

This button opens the Activities window. This module allows you to independently track every step taken in the resolution of a call. While you are not required to use activities with your call logging, doing so provides opportunity for better management of technical staff and more accurate tracking of each technician's workload.

Even if you choose to not use activities, HELP!Desk creates a number of activities automatically which it uses when generating response time statistics, network messages and ticklers.

Ca<u>l</u>ls

The Calls button opens the Call Selection window, which lists all calls in the current retrieval set.

<u>L</u>ink

This button allows you to link a call to a client. If you want to move a call from one client to another, you must first unlink from the original client.

<u>U</u>nlink

Unlink allows you to remove the link a call has to a particular client, or change the link to a different client.



Click the button to access the help file.

Ezit

Click this button to close (or minimize) the call window. Whether the window is closed or minimized depends upon the following setting in your HDWIN.INI file.

> [CallWindow] Exit=close or minimize



Client button. Click this button to open the client or profile window showing the client this call is linked to.



Referrals button. Click this button to create a referral for this call or see a list of previously generated referrals for the call.



Survey button. Click this button to record responses to customer satisfaction surveys. This feature allows you to quantify your customers' satisfaction with the help they receive from the help desk.





Tickler button. Click this button to generate a tickler. This button and the button on the toolbar perform the same action, except this tickler button uses information from the call to provide default values for many of the fields.

The CALL SEARCH Window

Accessed from the Main Menu, Button Bar or Call Window.

💳 Call Search	
⊖ C <u>a</u> ll Date	[Second
⊖ Su <u>bj</u> ect	Search
Product	<u>C</u> ancel
○ <u>F</u> ollow-up Date	
○ Assignee	
C Account Number	
○ <u>R</u> MA Number	
Resolution Code	
NMS	

Click the radio button or field label of the field you wish to search by, enter your search criteria, then click **Search**. If more than one match is found, the Call Selection window will open.

The CALL SELECTION Window

Accessed from Call Search or the Call window Browse button.

Note: The appearance of this window varies slightly depending on the path you take to open it.

		Call	Browse	
Call Date	Time of Call	Priority	Subject	16 mm
09/26/94	0257pm	1	Corrupt files	view
07/11/94	1014am	2	Data problem	
04/25/94	0242pm	3	Reporting	
•			•	E <u>x</u> it
Client	Ms. Tina Baccardi		Call # 1503	20318
		Рго	blem	
She was run the root direct	ning Windows and tory was trashed.	d her compu	iter locked up. When she tried t	o reboot,
		Res	olution	
I had her crea C: was compl Doctor onto th it ultimately at	te a boot disk from letely unrecognization of floppy and ther tempted to rectify	m another P able to DOS h run NDD. . The mach	C and reboot her machine with . I then had her try copying Nor It gave a series of error messag ine was then able to boot from t	it. Drive ton Disk ges which the hard

The calls are listed in the upper portion of the window. The problem and resolution of the highlighted call are shown below. A horizontal scroll bar allows you to scroll through all of the fields in the call. A vertical scroll bar, when required, allows you to scroll through all calls in the retrieval set.

Click the **View** button to load the selected call into the call window, where it may be viewed or edited.

The CLIENT Window

Accessed from the Main Menu, button bar (client search) or Call window.

•	Ms	s. Tina Baccar	di	▼ ▲
Name: Baccardi	Ms	s. Tina	Client Type: E 👤	<u>A</u> dd Editj Delete
Company: NuWave S	Surfwear			<u>N</u> ext Previous
Dept:	092 EXT:	Group:		Note <u>s</u> E-mail Phone # 's
Asset Tag:		Contract:	BRONZE	Ca <u>l</u> ls Con <u>fig</u> . Hardware
Loc Code:		Contr. Exp:	08/31/95 🔟 • Date	Soft <u>w</u> are
Priority: 2 🛓 🖉	>ritical Avenue	Min Charge:	15.00	E <u>z</u> it
Address 2:				
State: NJ	Zip Code:	08043		
Bidg:	🛨 Zone:			
Floor:	Office:			
0.0	Calls	1 of 6		

Client Window - Field Descriptions

Default Field Label	Description
Name	Client's last name followed by first name.
Client Type	The client type. Valid entries are I for internal clients , E for external clients . This field affects how information is displayed and reported, so it must be filled with "I" or "E".
Title	Job title.
Emp #	Employee number. This is an informational field and not used for searches.
Company	Company or organization name.
Phone #, Ext	Primary telephone number and extension

Dept	Department. This field has an associated table for data validation.	
Group	Group. This field has an associated table for data validation.	
Acct #	Account number. This field can be used to sort and filter reports, so it is important to make an entry in this field. The drop-down list contains table entries for validating data.	
Asset Tag	The value in this field is used as a default for the asset tag of all hardware entered for this client. This field can also be used to search for a client.	
Loc Code	Location code. This field has an associated table for data validation.	
Invc. Code	Type of invoice the client receives. This field has an associated table for data validation.	
Priority	The value of this field is used as a default priority for all calls entered for this client. This field has an associated table for data validation.	
Contract	The type of support contract this client maintains. This field has an associated table for data validation.	
Contr. Exp	When the contract expires. If the Date radio button is selected, then enter the date the contract expires. If Minutes is selected, then enter the number of support minutes remaining before the contract expires. This number will be decremented appropriately for each call logged to this client.	
Min Charge	The minimum charge that will be computed for each call logged to this client.	
Address and Address 2	Mailing address (two lines).	
City	City.	
State	State or Province.	
Zip Code	Zip or Postal Code.	
Country	Country.	
Bldg	Building. This field has an associated table for data validation.	
Zone	Zone (for internal addressing).	
Floor	Floor.	
Office	Office room number.	

Client Window - Button Descriptions

Default Button Label	Description
Add	Add a new client.
Edit	Change information for the current client.
Delete	Delete the current client. Calls and inventory information can either be deleted with the client or simply unlinked.
Next	Display the next client in the current retrieval set.
Previous	Display the previous client from the current retrieval set.
Notes	View or edit the notes field for this client. The notes feature provides you with a free-form text field which can hold up to 64,000 characters of additional information.
E-mail	Open the E-mail Address window. This allows you to store an unlimited number of e-mail addresses for the client (i.e. CompuServe, Internet, cc:Mail, etc.).
Phone #s	Open the Telecommunications window. This feature allows you to store an unlimited number of phone numbers for this client. Categories include phone, fax, modem and pager number.
Config.	Choose this option to list or edit the configurations for this client. All hardware and software for a client must be part of a configuration. Each client can have an unlimited number of configurations, each with an unlimited number of hardware and software components.
Hardware	Open the hardware selection window to view or edit the hardware that is linked to this client.
Software	Open the software selection window to view or edit the software that is linked to this client.
Help	Open the on-line Help.
Exit	Close (or minimize, depending on your HDWIN.INI settings) the client window.

The CLIENT PROFILE Window

Accessed from the Main Menu, button bar (client search) or Call window.

-	Clie	ent Profil	e - Me	Tina Baccar	li - (1 of 6)		
			C 1115.	Neer Ist		പരി	
Client: B	accardi, Ms. Tina			(NUW002)	1	Calls: 3	
N	luWave Surfwear				BR	ONZE 8/31/95	_
6	09 555-3092		Vice	President			
	05 555-5052		MCC	ricsident			
Call Date	Time of Call	Priority	Status	When	Call #	Technician	Su
09/26/94	0257pm	1	F	04/26/95	15020318	FRANK	Co
07/11/94	1014am	2	С	07/11/94	15020317	PETER	Da
04/25/94	0242pm	3	С	04/25/94	15020314	KEITH	Re
			Pro	blem			
She was r	running Windows a	and her com	puter lock	ed up. When sh	e tried to reboot,	the root director	'y
was trash	ed.						
			Reso	lution			
I had her c	reate a boot disk f	rom anothe	r PC and r	eboot her machir	e with it. Drive	C: was complete	ly l
unrecognia	zable to DOS. I the	en had her t	ry copying) Norton Disk Doc	tor onto the flop:	py and then run	
NDD. It ga	ve a series of erro	or message:	s which it	ultimately attempt	ted to rectify. Th	ne machine was	
Configura	tion Type	Ma	nufactur	er Pro	oduct Name	Descrip	otic 🕈
Main	CD-ROM	Sor	iy	CD3	2X4700	2X CD-F	RON
Main	COMPUTER	Gat	eway 200	10 486	DX2/66	Tower F	<u>~</u>
Notebook	COMPUTER	IBM		Thir	nkPad 750C	486 Not	ebc
•							
Configura	tion Type	Ma	nufactur	er Pro	duct Name	Descrip	otic 🕈
Main	WORD PROC	ESSINCNOV	ell		dPerfect		
Main	HELP DESK	Coa	stal Techr	nologies HEL	P!Desk		
Main	PIM	Chr	onologic	Inst	ant Recall		_ +
•							╺╴╴╴
scription	of functional a	reas					
But	ton Bar		The	buttons at the to	p of the window	w allow you to a	ccess
			(add	, edit and delete) any data relate	ed to the client.	
Clie	ent Summary		This	area shows bas	ic client inform	ation such as na	me,
			com	pany or departm	ent, phone num	ber, title, accou	nt
	number, support contract type and expiration, and the				he		
			num	ber of calls on f	ile.		
_							
Call	Call ListThis scrolling area lists all calls for the client.						
.							
Call	Detail		This	area shows the	problem and re	solution of the c	call that is
			high	lighted in the Ca	all List.		
			~		, ,	1	
Har							
	dware List		Scro	llable list of all	hardware linked	to the client.	
0-4	dware List		Scro	ollable list of all	hardware linked	to the client.	

Description of buttons

For complete details, refer to the button descriptions for the client window.



Previous and Next move through the clients in the current retreival set.



The **Client** button opens the client window allowing you to view or edit all of the client's information.



The **Notes** button allows you to view or edit the notes field for this client. This is a text field which will accept up to 64,000 characters.



The **Phone Numbers** button allows you to view, add or edit any phone numbers (phone, fax, modem, pager) for this client.



The E-mail button allows you to view add or edit this client's e-mail addresses.



The **Calls** button opens the call window and loads it with the call that is highlighted in the Call List. From here, you have full access to all call information, including activities, referrals and the survey.



The **Add Call** button allows you to add a new call. By default, the call will be linked to the current client.



The **Configurations** button opens the configuration selection window. From here you can create or edit a configuration, and access the hardware and software contents of each configuration.



The **Hardware** button is used to access the hardware that is linked to this client, regardless of the configuration it is part of.



The **Software** button opens the software selection window, listing all software linked to this client.



The **Help** system is accessed by this button.



The Exit button is used to minimize or close the profile window.

The CLIENT SELECTION Window

Accessed from the Client Search window if multiple matches exist for your selection criteria.

Select Client - 6 found			
Name	Company	City	State
Baccardi, Ms. Tina	NuWave Surfwear	Wildwood	NJ
Bacchus, Ms. Lorraine	Acme Laser Cannons	Lansing	MI
Backner, Mr. Bill	Plutonium Engineering	Portland	OR
Baclawski, Mr. Victor	Minisoft Corporation	Redmond	WA
Bacon, Mr. Kevin W.	Lambda Chi Alpha Fraternity	Indianapolis	IN
Bacrett, Ms. Lisa University of Pittsburgh		Pittsburgh	PA
•			+
<u>A</u> dd <u>O</u> K <u>C</u> ancel			

The buttons on this window work as follows:

Add	Opens the client window and adds a new client record.
ОК	Selects the currently highlighted client and opens either the client window or the profile window. If neither window is currently open or minimized, then your "program defaults" settings dictate which window will open. If the client or profile window is already open (even if minimized), then that window will be loaded with the selected client.
Cancel	Closes the Select Client window and returns to Client Search.

The E-MAIL Window

Accessed from the Client, Client Profile and Security windows.

•	😑 E-Mail Selection - Ms. Tina Baccardi 🗾 🗖			
Carrie Compus Internet	erve	Address 71736,3475 tinab@nuwave.com	<u>A</u> dd <u>E</u> dit <u>D</u> elete	
		→	<u>H</u> elp Exit	
Car	ier: Internet	<u>*</u>		
Addr	iss: tinab@nuwave.com			

This window allows you to store an unlimited number of e-mail addresses for a client or HELP!Desk user.

Description of fields

Default Field Label	Description	
Carrier	The carrier or mail system (i.e. Compuserve, America On-Line, cc:Mail, etc).	
Address	Address required to send mail to the client over the specified carrier.	

The HARDWARE ENTRY Window

Accessed from Hardware Selection and House Hardware windows.

- Hardware Entry			
Configuration: Main	Ms. Tina Baccardi		
Туре:			
Brand:			
Model:		<u>S</u> ave	
Description:		Browee	
Serial #		DIOWSE	
Asset Tag:		<u>H</u> elp	
Shared ?: 📃 👤		Cancel	
Purch Date: 00/00/00	PO Number:		
Price: 0	Vendor: 📃 보		
Warranty:	Warranty Exp: 00/00/00		
Service Code:	Svc Expires: 00/00/00		
Depreciate: 🗖	Curr. Value: 0		

Hardware Entry Field Descriptions

Default Field Label	Description		
Configuration	The name of the configuration and the client (if linked) are displayed here.		
Туре	The type or category of hardware.		
Brand	The brand or manufacturer.		
Model	The model name or number.		
Description	The description of the hardware.		
Serial #	Serial number.		
Asset Tag	The assigned asset tag of the hardware.		
Shared	This field is used to identify equipment that is shared by several clients, such as a network printer. If the equipment is not shared, enter " N ". If it is shared, enter " P " or " S " for primary or secondary, respectively. Each piece of shared equipment should be listed under each client who shares it. This field should be marked " S " for all but one client, who should be " P ". In reports, the hardware will be listed under each client, but will only be added to totals if the Shared field is "N" or "P".		
Purch Date	Purchase date.		
PO #	Puchase order number.		
Price	Purchase price.		
Vendor	Company the hardware was purchased from. The drop-down for this field accesses the vendor table.		

Warranty	The length of the warranty period. Enter a number followed by " Y " (years), " M " (months) or " D " (days). For example, 1Y, 3M or 90D. If the purchase date has been filled in, the warranty period will be used to compute a default value for the next field, warranty expiration date.
Warranty Exp	Warranty expiration date. A default value is computed if Purchase Date and Warranty fields contain data.
Service Code	Identifies the company which is responsible for servicing the equipment. The drop-down list accesses the Service Company table.
Svc Expires	The date the service contract on this equipment expires. Reports can be generated giving you advance notice of when warranties and service contracts expire.
Depreciate	Check this box if the value of this equipment is depreciated over time.
Curr. Value	The current (depreciated) value of the equipment.

The HARDWARE SELECTION Window

Variations of this window are accessed from Hardware Search, Configurations Hardware, Client window, Profile window, button bar and the Inventory menu.

😑 Hardv	vare for Configura	ation - Main 🕘 fo	und	-
Туре	Brand	Model	÷	
COMPUTER	Gateway 2000	486DX2/66		Add
KEYBOARD	Gateway 2000	14587		
MOUSE	Microsoft	37967		Edit
SOUND CARD	Logitech	Soundman Wave		Delete
SPEAKERS	Labtec	CS-550	-	
•				
Configuration:	Main	Ms. Tina Baccardi	- +	House
Туре:	COMPUTER			Unlink
Brand:	Gateway 2000			
Model:	486DX2/66			Help
Description:	Tower PC with 16MB F	RAM, dual floppy		Exit
Serial #	398098F3984		+	

Description of Buttons

<u>A</u>dd

Click the Add button to enter a new piece of hardware for this configuration. Data entry takes place in the Hardware Entry window, shown elsewhere.

<u>B</u>rowse

While entering data into the hardware window, you can click the Browse button to access the hardware table. The table can contain the basic descriptions of equipment that is widely used by your clients, thus speeding data entry.

Edit

The Edit button loads the selected item into the Hardware Entry window and allows you to change the information.

<u>D</u>elete

Click this button to delete the highlighted piece of hardware.

House

Click the House button to access house hardware. This enables you to move a piece of hardware from house inventory into the current configuration.

<u>U</u>nlink

The Unlink button allows you to move the selected piece of hardware to another client or to house inventory. If you are moving to another client and that client has multiple configurations, you will be further prompted to select the desired configuration.



Click this button to access help.

E<u>x</u>it

Click this button to close the hardware selection window.
The HOUSE HARDWARE Window

Accessed from Hardware Selection and the Inventory menu.

•	House Hardware	- 5 found	-
Туре	Brand	Model	
HARD DISK	Seagate	ST4031	Add
MONITOR	NEC	3D	
MONITOR	NEC	4D	Edit
MONITOR	NEC	5FG	Delete
MONITOR	NEC	5FG	
•		+	
Configuration:	None > <	t Linked>	Move
Туре: 占	IARD DISK		
Brand: S	ieagate		
Model: S	T4031		Help
Description: 5	00 mb		Evit
Serial # 2	897RE9873	•	

The top portion of the window contains a scrollable list of all hardware in house inventory. The scrollable lower area contains the detail of the selected item.

The **Add**, **Edit** and **Delete** buttons allow you to add to house inventory, edit an existing item or delete an item, respectively. The **Move** button takes the selected item out of house inventory and moves it into the current configuration. If the item in house inventory is part of a configuration, you will be asked if you want to move the single piece or the entire configuration.

The HOUSE SOFTWARE Window

Accessed from Software Selection and the Inventory menu.

•	House Software -	39 found	-
Туре	Manufacturer	Product Name	•
CUSTOM	Coastal Technologies	CitiShip	Add
DATABASE	Borland	Paradox	
DATABASE	Borland	dBase	<u>E</u> dit
DATABASE	Borland	dBase III+	Delete
DATABASE	Microsoft	Access	•
•		+	
Configuration: Type: Q Manufacturer: Q Product Name: Q Description: S Version:	None > <no CUSTOM Coastal Technologies CitiShip Shipping and Mailing List</no 	t Linked>	 Move Copy Help Exit

The top portion of the window contains a scrollable list of all software in house inventory. The scrollable lower area contains the detail of the selected item.

The **Add**, **Edit** and **Delete** buttons allow you to add to house inventory, edit an existing item or delete an item, respectively. The **Move** button takes the selected item out of house inventory and moves it into the current configuration. If the item in house inventory is part of a configuration, you will be asked if you want to move the single piece or the entire configuration.

The **Copy** button allows you to create a number of copies of a piece of software to match the number of licenses that were purchased. This way, you can move the software to clients as needed. When you no longer have copies in House Software, you know that all of your licenses are in use.



To use the **Copy** function, simply click the button, enter the number of copies you want to make (the total number of licenses less one), and click **OK**.

The REFERRALS Window

Accessed from the Call window.



		Referrals	- 1 found	
Referred Date	Time	Referred by	Referred to	<u>A</u> dd
09/26/94	03:41 pm	FRANK	Sales Department	<u>E</u> dit
				Delete
				Help
+			+	E <u>x</u> it
Referred Date	09/26/94	11	Time 03:41 pm	
Referred by	FRANK	🛨 Refer	red to Sales Department	<u>+</u>
Comments	We need to mak	e sure our clie	nts have backups!	

Referrals are used when people or groups outside the technical staff need to be made aware of an issue contained in a call. For example, if a customer suggests a product enhancement, the help desk staff may log and close the call, but the customer's suggestion needs to be seen by the product development staff. A referral to product development will ensure that the suggestion is seen.

Default Field Label	Description
Referred Date	Date the referral was generated. Defaults to current system date.
Time	Time the referral was generated. Defaults to current system time.
Referred by	The person making the referral. Defaults to the current technician.
Referred to	The department, group or person who will be the recipient of the referral.
Comments	The reason for the referral.

Referrals Window Field Descriptions

Under **Reports, Referral Reporting** you can generate detailed reports listing all calls that have been referred to a specific group or person within a date range you specify.

Note: A Referral is used to make another group or department aware of an issue raised in a call. It is not intended to escalate a call. Call escalation is done through the **Reassign** activity.

The SOFTWARE ENTRY Window

This window is accessed from Software Selection and House Software.

- S	oftware Entry	
Configuration: Main	Ms. Tina Baccardi	
Туре:	Ī	
Manufacturer:		
Product Name:		<u>S</u> ave
Description:		Browee
Version:		DIOWSE
Serial #		<u>H</u> elp
Shared?: 📃 👤		Cancel
Asset Tag:		
Purch Date: 00/00/00	PO Number:	
Price: 0	Vendor: 📃 👤	
Warranty:	Warranty Exp: 00/00/00	
Service Code: 📃 👤	Service Exp: 00/00/00	
Lic. Starts: 00/00/00	Lic. Ends: 00/00/00	
Depreciate ?:	Curr. Value: 0	

Software Entry Field Descriptions

Default Field Label	Description
Configuration	The name of the configuration and the client (if linked) are displayed here.
Туре	The type or category of software.
Manufacturer	The brand or manufacturer.
Product Name	The product name or model.
Description	The description of the software.
Version	Product version.
Serial #	Serial number.
Asset Tag	The assigned asset tag of the software.
Shared	This field is used to identify software that is shared by several clients, such as an e-mail program. If the software is not shared, enter " N ". If it is shared, enter " P " or " S " for primary or secondary, respectively. Each shared program should be listed under each client who uses it. This field should be marked " S " for all but one client, who should be " P ". In reports, the software will be listed under each client, but will only be added to totals if the Shared field is "N" or "P".
Purch Date	Purchase date.
PO #	Puchase order number.
Price	Purchase price.

Vendor	Company the software was purchased from. The drop-down for this field accesses the vendor table.
Warranty	The length of the warranty period. Enter a number followed by " Y " (years), " M " (months) or " D " (days). For example, 1Y, 3M or 90D.
	If the purchase date has been filled in, the warranty period will be used to compute a default value for the next field, warranty expiration date.
Warranty Exp	Warranty expiration date. A default value is computed if Purchase Date and Warranty fields contain data.
Service Code	Identifies the company which is responsible for maintaining the software. The drop-down list accesses the Service Company table.
Svc Expires	The date the maintenance contract on this software expires. Reports can be generated giving you advance notice of when warranties and service contracts expire.
Lic. Starts	The license starting date. This field and the license ending date below are intended to help you monitor your use of evaluation software.
Lic. Ends	License ending date.
Depreciate	Check this box if the value of this software is depreciated over time.
Curr. Value	The current (depreciated) value of the software.

The SOLUTIONS Window

Accessed from the Utilities menu or button bar.

•	Solutions	▼ ▲
Matches Text: 10	Graphics/Animation: 1	Add
Call Date:	10/08/93 III Time of Call: 10:21	Edit
Category:	S SOFTWARE	<u>D</u> elete
Subject:	OS/2 Error	<u>N</u> ext
Product:	HELP!Desk 2.0	Previous
Res. Code:	Modified DOS/WIN Configuratio	Search
Technician:	FRANK 🛃 Date Added: 05/05/95	Browse
Solution:	Running HELP!Desk 2.0 under OS/2, user got the error message SYS 2237, which has something to do with the DOS kernal. To solve the problem, SET HELPDESK=/CX0,100%/OU0/OP0 If that works, you may want to have the customer remove one or more of the parameters.	 Graphic Help Exit
	If there is a problem shelling out, SET SHELLBY=OVERLAY.	Record:

Solutions Window - Field Descriptions	Solutions	Window -	Field	Descri	ptions
---------------------------------------	-----------	----------	-------	--------	--------

Default Field Label	Description
Call Date	The date of the call (if the solution was created from a call).
Time of Call	The call time.
Category	The category of the problem.
Subject	Subject of the problem / solution.
Product	Product which is related to the problem.
Technician	The technician who entered the solution or resolved the call.
Date Added:	The date the solution was added to the Solutions database.
Solution	The text of the problem and solution. If the solution is from a call, this field is the combination of the call's "Problem" and "Resolution" fields.

Solutions Window - Button Descriptions

Default Button Label	Description
Add	Manually create a new solution. Solution text may be typed or pasted from the Windows clipboard.
Edit	Edit the current solution.
Delete	Delete the current solution.
Next	Display the next solution. The Record indicator shows your relative position within the retrieval set of matching records.
Previous	Display the previous solution.
Search	Enter new key words to search again. You may want to add to your original criteria if the number of matches is too large to be practical.
Browse	Browse through the solutions or images that meet your search criteria. You will be prompted to select the type of matches you want to peruse. Select Items to Browse Solutions Graphics Cancel
Graphic	Display the next graphic image that meets your search criteria.
Help	Display the Help window.
Exit	Close the Solutions window.



Accessed from the Call Window.

Satisfaction Survey Report	
Survey Date: 04/27/95	Save
Client: Ms. Tina Baccardi	Save <u>/</u> Exit
Score:	
Logged by: KEITH	
Notes:	Help
	Cancel

Survey Window Field Descriptions

Default Field Label	Description
Survey Date	Date survey was taken. Defaults to current system date.
Client	Name of the person who was surveyed. Defaults to the client who the call is linked to.
Score	Satisfaction rating given by the client. A table exists for data validation.
Logged by	The name of the person who surveyed the client. Default is the currently logged-in user.
Notes	Up to 64,000 characters of text describing the customer's response.

Once a survey has been entered for a call, the button will change to **Define the survey** only one survey entry is permitted per call, but it can be edited as needed.

Reports are available to list calls with surveys, without surveys, with certain scores, etc. Choose **Reports**, **Survey Reporting** for a complete list of available reports.

The TELECOM ENTRY Window

Accessed from the Phone Selection window.

	Telecom En	try	
● Phone ○ Fax	🔿 Pager	🔿 Modem	
Description:		ð	<u>S</u> ave
Number:			<u>C</u> ancel
Pager:			
Prefix:			
Suffix:			· · · ·]
Baud Rate:	±		Help

The first choice to make is the type of entry you are making. Click the radio button for Phone, Fax, Pager or Modem. The editable fields in the window will change based on your selection. Descriptions of all fields in the window are listed below.

Default Field Label	Description
Description	A description of the number, i.e. Office, Direct Line, Cellular, etc.
Number	The telephone number.
Pager	Pager type, either alphanumeric or numeric.
Prefix	Characters to send to a pager before the message text.
Suffix	Characters to send to a pager after the message text. For numeric pagers, this character is usually the pound sign "#".
Baud Rate	For modems, the maximum connection speed.

Telecom Entry Field Descriptions



The TICKLER Window Accessed from the Calls window, Utilities or the button bar.

List of Ticklers - 3 found				
List	of Ticklers Fo	rFRANK	<u>+</u>	
Event Date	Event Time	Tech Name	Event Description	Add
04/26/95 04/27/95	04:00 pm 11:01 am	FRANK FRANK	Call #15020318 Return c Call John Simms about ha	<u>E</u> dit
04/26/95	04:00 pm	FRANK	Call# 15020318	Delete
				Print Help
+			+	E <u>x</u> it
Tech N	ame: FRANK	±]	
Event	Date: 04/26/95	5 🛄 B	vent Time: 04:00 pm	
Event Descri	ption Call#15	020318		

Tickler Window Field Descriptions

Default Field Label	Description
Tech Name	Name of person who will receive the tickler. Default is the assignee of the call.
Event Date	The date the tickler becomes due. Default is the status date of the call.
Event Time	The time the tickler becomes due. Default is the status time of the call.
Event Description	The purpose of the tickler. Default is the call number of the current call.

The drop-down at the top of the window defaults to your log-in name so that your ticklers are displayed. If your security access rights allow, you may use the drop-down to select another technician and view his or her ticklers. Regardless of your security level, you can always generate a tickler for any technician.

Remember...

You must run the HDALERT program if you want automatic notification whenever a tickler is due.

"How to" Section The following pages describe how to perform common tasks in HELP!Desk.

Entering a New Call

To log a new call, choose one of the following methods:

From the Menu:	Call, Add or press Ctrl+A
From the Tool Bar:	Click 🛅
From the Client Profile:	Click

If either the Client or Client Profile Window is open, the new call will be automatically linked to the displayed client. If not, the call will be initially "*<not linked*>" but can be linked to a client later.

When a call is added, a unique call number (sometimes referred to as work order number) will be assigned and displayed in the title of the window. Some companies will give this number to the customer so they can refer to the problem if they call again. Other companies feel this approach is too impersonal, and prefer to deal with the customer strictly by name. With HELP!Desk, the choice is yours.

-		(Call # 1003		▲
$ \Gamma$	Time of Call: 05/10/95	i 🕕 03:33 pm	Client: <not linked=""></not>		<u></u>
	Problem:			*	Save Save/Exit Search Doto Noto Previoes
	Category: 🔄 🛓		Last Update: 00/00/00)	Antigities
	Subject:		Technician: FRANK	<u>+</u>	Caĝs
	Product:				Link
	Priority: 📃 🛓				
	Resolution:				<u>H</u> elp <u>C</u> ancel
	Res. Code:		±		
	Status: 📃 🛓		When: 00/00/00	:	
	Duration: 0		Charge: \$.00		
	Addl Time:		Addl Chrg: \$.00		
F	RMA Number:	Add t	to solutions when closed: \mathbb{Y}		
Ĺ					
0	Referrals	0 Activities	1 of 1		

Call Window Buttons - Add/Edit Mode

Default Button Label	Description
Save	Saves the call with any changes you made.

Save/Exit	Saves the call then closes (or minimizes) the Call window.
Link	Links the call to a client. The Client Search window will open allowing you to find the desired client.
Help	Opens the Help window.
Cancel	Cancels editing and discards any changes you made.

Call Window Field Descriptions

Default Field Label	Description
Time of Call	The date and time of the call. These two fields are pre-filled with the system date and time. The calendar button allows you to select a date using your mouse.
Client	If the call is linked to a client, the client's name is displayed here. When adding a call, the call is automatically linked if the client or profile window is open. An unlinked call is indicated by the message " <i><not linked=""></not></i> ".
Problem	Up to 64,000 characters of text describing the problem.
Category	The problem category. A drop-down table exists for this field to validate the data.
Last Update	This date is maintained automatically by HELP!Desk. It is updated each time the call is modified.
Subject	The subject of the call. A drop-down table exists for this field to validate the data and ensure consistent data entry.
Product	The product that the client is having a problem with. A drop-down table exists for this field to validate the data and ensure consistent data entry.
Technician	The technician who is responsible for the call. This default for this field is the name of the current HELP!Desk user. A drop-down table exists for this field to validate the data and ensure consistent data entry.
Priority	The priority of the call. The initial value of this field is taken from the client's priority field. A drop-down table exists for this field to validate the data and ensure consistent data entry.
Resolution	Up to 64,000 characters of text describing the resolution of the call.
Res. Code	The resolution code is used to categorize the way in which each problem was resolved. A drop-down table exists for this field to validate the data and ensure consistent data entry.
Status	The current status of the call. Some entries in this field will pre-fill the "When" date and time, and also generate network messages and ticklers. A drop-down table exists for this field to validate the data and ensure consistent data entry.
When	This is the action date/time for the "Status" field. It is used to indicate when a call was closed or when follow-up or other activity should occur.

Duration	The time taken to resolve the call. This is the actual time spent working on the problem, not the elapsed time between when a call was opened and when it was closed. The duration is always displayed in minutes, but can be entered in days, hours and .or minutes. For example, 1 day, 2 hours and 35 minutes would be entered as 1D2H35M . The program default Number of work hours in day is used to convert the "day" entry into hours. Duration is accumulated automatically as long as the call remains in edit mode.
Charge	The charge can be entered manually or computed automatically. If computed, it's value is determined by the duration , the client's minimum charge per call , and the program default billing rate , billing increment , minimum charge per call and minimum charge per activity .
Addl Time	Any additional time that needs to be tracked, such as time charged by an outside repair firm or consultant.
Addl Charge	Any additional charges that need to be applied against this call, such as a repair bill from a service company.
RMA Number	A Return Materials Authorization Number that can be assigned if the client needs to return merchandise.
Add to Solutions when closed	If "Y" is entered here, this call will be marked for inclusion into the Solutions database. Only calls that have been added to the Solutions database can be found when performing a key word search in the Solutions module.

Note: When a call comes in, you may want to make a practice of retrieving the Client Profile of the person who is calling. This way you have the opportunity to familiarize yourself with the clients' previous calls and configuration before you address the new call. Also, if the client is not on file, you will know that you need to obtain additional information so the client may be added and the call can be properly linked.

Retrieving an Existing Call

An existing call can be retrieved into the Call window by any of the following methods:

From the Menu:	Call, Find This option allows you to search for a call by one of eight fields as shown below.
	Call, Goto This option allows you to retrieve a call by call number (work order number).
From the Client window:	Calls Click the Calls button to open a selection window of calls for the current client. Select one of the calls to load it into the Call window.
From the Client Profile window:	Click the View Calls button to open a selection window of calls for the current client. Select one of the calls to load it into the Call window.

Using the Call, Find menu option

You have a choice of eight fields to search on, as indicated in the **call search** window below.



Click the radio button or field label of the field you wish to search by, enter your search criteria, then click **Search**. If more than one match is found, the Call Selection window will open.

=	Call Sea	arch - 2 found		
Product	Call Date	Subject		
NMS	11/24/93	Printing		
NMS	02/18/94	Printing		
•			• <u>Cancel</u>	
Client Call # 518				
	Prob	lem		
About NMS 3.02				
He said he could not print any reports from the system and he kept getting "Printer Not Ready" box. On the Computer System Information screen, showed "Printer: Not				
	Reso	lution		
<02/18/94 15:39 FF He'll be back on Tu	RANK≻ Called him ba esday 02/22/94.	ck at the prescribed time, but he	was gone.	
<02/28/94 09:10 FF	RANK> They recently	v had a new network installed (v	vith a new	

From this window you would select the desired call and click **OK**. Note that a successful search changes the retrieval set of calls. From the call window, **Next** and **Previous** will move you through the calls that were displayed in the window above.

Using the Call, Goto menu option

This option allows you to quickly retrieve a single call by call number (also called work order number). Simply enter the number of the desired call and click **OK**.

Goto	Call	
Enter Call:	<u> </u>	OK Cancel

If the call is found, it will be displayed in the call window.



Both of these buttons will display a selection window of all calls linked to the current client.

- Ca	II Selection -	Ms. Tina	Baccardi - 3 found	▼ ▲
Call Date	Time of Call	Priority	Subject	
09/26/94	0257pm	1	Corrupt files	Add
07/11/94	1014am	2	Data problem	
04/25/94	0242pm	3	Reporting	Edit
				<u>D</u> elete
•			+	
Problem View She was running Windows and her computer locked up. When she tried to reboot, the root directory was trashed. View				
Resolution Help I had her create a boot disk from another PC and reboot her machine with it. Drive C: was completely unrecognizable to DOS. I then had her try copying Norton Disk Doctor onto the floppy and then run NDD. It gave a series of error messages which it ultimately attempted to Exit				

Within this window you can scroll through all calls that have been logged to the client. The horizontal scroll bar allows you to see additional information for each call. The problem and resolution text for the currently highlighted call can be found in the lower portion of the window.

The **Edit** and **View** buttons open the call window in edit and view modes, respectively. The **Add** button opens the call window and allows you to enter a new call.

Click **Delete** to delete the currently selected call.

Accessed from the Call window by clicking Activities

The Activities module allows you to independently track every step taken in the resolution of a call. While you are not required to use activities with your call logging, doing so provides an opportunity for better management of technical staff and more accurate tracking of each technicians' workload.

The Activities Window displays a list of all activities for the current call. The highlighted activity is shown in its entirety in the lower portion of the window. This is also where data entry takes place when an activity is added or edited.

_	Activities for Call #15020318					
Γ	Start Date	Start Time	Activity	Technician	Priority	<u>A</u> dd
	04/26/95	03:24 pm	Returned call	FRANK	1	<u>E</u> dit
						Delete
						Reassign
						Help
k	•				+	E <u>x</u> it
Г						
	Start Date: 0	4/26/95	Start Time: 03:24 pm			
L	End Date:	4/26/95	End Time: 03:25 pm			
L	Duration: 1		Charge: \$.00	🗌 Auto Com	pute	
L	Activity:	eturned call	Techniciar	I:FRANK 👤	Priority:	1 👤
L	Status:	. <u>.</u>	Date: 04/26/95 11 04:00 pm	X Tickle		
	Detail: L	eft message or	n voice mail			

To add a new activity, simply click the Add button.

Activities Window Field Descriptions

Default Field Label	Description	
Start Date	The starting date of the activity. It is automatically set to the system date and cannot be changed.	
Start Time	The time the activity was created. It is set to the current system time and cannot be changed.	
End Date and End Time	These fields are used to indicate when the activity was completed. If the fields are left blank, they will be set to the system date and time when you click the Save button.	
Duration	The time spent performing the activity. If left blank, the elapsed time of the activity will be stored here.	
Charge	The charge to the client for this activity.	

Auto Compute	If checked, the charge will be computed automatically based on the duration , billing rate , billing increment and minimum charge per activity .	
Activity	A brief description or purpose of the activity.	
Technician	The name of the technician who performed the activity.	
Priority	The priority of the call. Changes made here are reflected back in the call window.	
Status	The status of the call as of the completion of this activity. The call window is updated with this status.	
Date	The date and time related to the status, such as when the call was closed or when a follow-up call should be made.	
Tickle	If checked, a tickler will be generated for the technician named in the activity, with an event date and time corresponding to the status date above.	
Detail	Up to 64,000 characters of text describing in detail the action that was taken in performing this activity.	

Activities Window Button Descriptions - Add/Edit Mode

Default Button Label	Description
Help	Opens the Help window.
Save	Saves the current changes.
Save/Exit	Saves the changes and closes the Activities window.
Cancel	Cancels editing without saving the changes.

Accessed from the Activities window, which is accessed from the Call window by clicking

A call can be reassigned simply by editing the call and changing the name in the "Technician" field. The drawback to this method is that no audit trail exists and you will not necessarily know which other technician(s) have worked on the call. You will also be unable to track time time between the assignment of a call an its acceptance by the technician.

Having said that, there is obviously a better way to reassign a call in HELP!Desk. That way is to use the **Reassign** button on the Activities window. Clicking this button opens a dialog box that will be used to create the reassign activity.

Activities for Call #15020318			
Start Date Start Time Activity	Technician	Priority	Add
04/26/95 03:24 pm Returned call	FRANK	1	<u>E</u> dit
			<u>D</u> elete
			<u>R</u> eassign
			Help
•		+	E <u>x</u> it
Start Date: 04/26/95 11 Start Time: 03:24 pm End Date: 04/26/95 11 End Time: 03:25 pm Duration: 1 Charge: \$.00 Activity: Returned call Techniciar Status: F Date: 04/26/95 11 04:00 pm	☐ Auto Comj 1:FRANK <u>•</u> IX Tickle	oute] Priority: [
Detail: Left message on voice mail			

The Reassign Call dialog box is pictured and explained below.

	Reassign Call to	
Technician:	<u>+</u>	<u>о</u> к
Priority: 1	🛃 Mission Critical	Cancel
Status: F	FOLLOW-UP	
When: 00/00	/00	
Tickle: 🗖		

Reassign Call Window - Field Descriptions

Default Field Label	Description
Activity	A brief description or purpose of the activity.

Technician	The technician you are reassigning the call to.	
Priority	The priority of the call. Changes made here are reflected back in the call window.	
Status	The status of the call as of the completion of this activity. The call window is updated with this status.	
When	The date and time related to the status, such as when the follow-up call should be made. When reassigning a call, you would typically enter the current date and time.	
Tickle	If checked, a tickler will be generated for the technician named in the activity, with an event date and time corresponding to the status date above. You should always generate a tickler when reassigning a call.	



When responding to a client's query, you will often find it useful to retrieve the **Client Profile** which shows basic customer information (name, company or department, phone number, service contract, etc.), a summary of the customer's calls, and their hardware and software. The call information is particularly useful as it allows you to quickly scan both the nature and volume of the client's past calls, as well as their resolution or current status.

The **Client** window allows you to view or edit all client information, but requires you to click additional buttons to see the call history or inventory.

Whether you choose **Find** or **Profile**, the retrieval steps are the same. You will be presented with the Client Search window.

😑 🛛 🔤 Client Searcl	1
● <u>L</u> ast Name	
○ C <u>o</u> mpany	769108
○ <u>E</u> xtension	<u>C</u> ancel
O <u>P</u> hone	
⊖ Search <u>K</u> ey	

You can retrieve a client by any of the five methods listed in the window. Click the radio button next to the field you wish to search for, enter your search criteria in the entry box, then click **Search**.

If no match is found, a message will be displayed, and you will be returned to the client search window.

If multiple matches are found, the **Select Client** window will open.

😑 Select Client - 6 found			
Name	Name Company		State
Baccardi, Ms. Tina	NuWave Surfwear	Wildwood	NJ
Bacchus, Ms. Lorraine	Acme Laser Cannons	Lansing	MI
Backner, Mr. Bill	Plutonium Engineering	Portland	OR
Baclawski, Mr. Victor	Minisoft Corporation	Redmond	WA
Bacon, Mr. Kevin W.	Lambda Chi Alpha Fraternity	Indianapolis	IN
Bacrett, Ms. Lisa	University of Pittsburgh	Pittsburgh	PA
<u>A</u> dd <u>O</u> K <u>C</u> ancel			

The buttons on this window work as follows:

Add	Opens the client window and adds a new client record.
ОК	Selects the currently highlighted client and opens either the client
	window or the profile window
Cancel	Closes the select client window and returns to client search.

Other functions such as **Link** and generating a report for a single client will also open the Client Search window. In such instances, the match will not be displayed in the client or profile window, but rather will be used simply as a response to program prompts (such as the client to link to). Accessed from the Client menu (Add) and the Select Client window.

While you are not required to link calls or inventory to individual clients, you will probably want to in almost all circumstances. If your customers pay for support or service contracts, you will definitely want to add them to the system.

Add is used to add a new client record.	When this option is selected, the Client Window will
open, allowing you to add the new clien	t information.

-	Adding Client	-
Name: <last name=""> <fir< th=""><th>st name> Client Type: 👱 Emp #:</th><th>Add Save Save/Ezit</th></fir<></last>	st name> Client Type: 👱 Emp #:	Add Save Save/Ezit
Company:		Previoes
Dept:	Group:	Notes E-mail
Acct #:	Service Contract / SLA:	Pagae D's
Asset Tag:	Contract:	Congie.
Loc Code: 📃 🛓	Contr. Exp: 00/00/00 🗐 🔿 Date	Bagaware
Invc Code: 📃 🛓	O Minutes	
Priority:	Min Charge: .00	<u>ri</u> eip <u>C</u> ancel
Address:		
Address 2:		
City:		
State: Zip Code:		
Country:		
Bidg: 👤 Zone:		
Floor: Office:		
	1 of 1	

Field Descriptions

Default Field Label	Description
Name	Client's last name followed by first name.
Client Type	The client type. Valid entries are I for internal clients, E for external clients. This field affects how information is displayed and reported, so it must be filled with "I" or "E".
Title	Job title.

Emp #	Employee number. This is an informational field and not used for searches.
Company	Company or organization name.
Phone #, Ext	Primary telephone number and extension
Dept	Department. This field has an associated table for data validation.
Group	Group. This field has an associated table for data validation.
Acct #	Account number. This field can be used to sort and filter reports, so it is important to make an entry in this field. The drop-down list contains table entries for validating data.
Asset Tag	The value in this field is used as a default for the asset tag of all hardware entered for this client. This field can also be used to search for a client.
Loc Code	Location code. This field has an associated table for data validation.
Invc. Code	Type of invoice the client receives. This field has an associated table to data validation.
Priority	The value of this field is used as a default priority for all calls entered for this client. This field has an associated table for data validation.
Contract	The type of support contract this client maintains. This field has an associated table for data validation.
Contr. Exp	When the contract expires. If the Date radio button is selected, then enter the date the contract expires. If Minutes is selected, then enter the number of support minutes remaining before the contract expires. This number will be decremented appropriately for each call logged to this client.
Min Charge	The minimum charge that will be computed for each call logged to this client.
Address and Address 2	Mailing address (two lines).
City	City.
State	State or Province.
Zip Code	Zip or Postal Code.
Country	Country.
Bldg	Building. This field has an associated table for data validation.
Zone	Zone (for internal addressing).

Floor	Floor.
Office	Office room number.

Button Descriptions - Add / Edit Mode

Default Button Label	Description
<u>S</u> ave	Saves the current client record. The client window remains open.
Save <u>/</u> Exit	Saves the client information and closes (or minimizes) the client window.
<u>H</u> elp	Opens the Help window.
<u>C</u> ancel	Cancels the current add / edit.

Adding Inventory to a Client

This option can be accessed from several places, but the most common methods are from the Client or Client Profile windows by choosing the **Configurations** button.



This button accesses a selection window of all configurations (hardware and software inventory) for the current client. Configurations are used to tie all of the hardware and software components of a computer system together. For example, your desktop PC consists of a CPU, monitor, keyboard, disk drives, memory, peripherals such as a CD-ROM drive, speakers, sound card, printer, network card and mouse, and numerous software packages. Each client may possess an unlimited number of configurations, with each configuration containing an unlimited number of hardware and software components.

-	😑 🛛 Configuration Selection - Ms. Tina Baccardi 🛛 🔽 🔺		
С	onfiguration	Description	
M	ain	Desktop computer	Add
No	otebook	Notebook computer	Edit
			Delete
			Ha <u>r</u> dware
			Soft <u>w</u> are
			Unlink
	Configuration	Main	<u>H</u> elp
			E <u>x</u> it
	Description	Desktop computer	

The upper portion of the window lists this client's configurations. The lower portion is used to add or edit a configuration.



Click the Add button to enter a new configuration.



The Hardware and Software buttons will display selection windows of all hardware and software that is part of the highlighted configuration. Scroll bars allow you to view each item in the configuration. The full detail of the selected piece is shown in the lower portion of the window.

An example of the Configuration Hardware window is shown below. The Configuration Software window functions in a similar fashion.

🛥 Hardv	vare for Configuration	n - Main - 9 found		▼ ▲
Туре	Brand	Model	t	
COMPUTER	Gateway 2000	486DX2/66		Add
KEYBOARD	Gateway 2000	14587		
MOUSE	Microsoft	37967		Edit
SOUND CARD	Logitech	Soundman Wave		Delete
SPEAKERS	Labtec	CS-550	-	
+		+	۲,	
Configuration:	Main Ms	. Tina Baccardi	₽	House
Туре:	COMPUTER			Unlink
Brand:	Gateway 2000			
Model:	486DX2/66			Help
Description:	Tower PC with 16MB RAM,	dual floppy		Exit
Serial #	398098F3984		¥	

Description of Buttons



Click the Add button to enter a new piece of hardware for this configuration. Data entry takes place in the Hardware window, shown below.

🛥 H:	ardware Entry	
Configuration: Main	Ms. Tina Baccardi	
Туре:		
Brand:		
Model:		<u>S</u> ave
Description:		Browned
Serial #		DIOWSE
Asset Tag:		<u>H</u> elp
Shared?:		Cancel
Purch Date: 00/00/00	PO Number:	
Price: 0	Vendor: 📃 👤	
Warranty:	Warranty Exp: 00/00/00	
Service Code: 📃 🛓	Svc Expires: 00/00/00	
Depreciate: 🔽	Curr. Value: 0	

Hardware Entry Field Descriptions

Default Field Label	Description
Configuration	The name of the configuration and the client (if linked) are displayed here.
Туре	The type or category of hardware.
Brand	The brand or manufacturer.

Model	The model name or number.
Description	The description of the hardware.
Serial #	Serial number.
Asset Tag	The assigned asset tag of the hardware.
Shared	This field is used to identify equipment that is shared by several clients, such as a network printer. If the equipment is not shared, enter " N ". If it is shared, enter " P " or " S " for primary or secondary, respectively. Each piece of shared equipment should be listed under each client who shares it. This field should be marked " S " for all but one client, who should be " P ". In reports, the hardware will be listed under each client, but will only be added to totals if the Shared field is "N" or " P ".
Purch Date	Purchase date.
PO #	Puchase order number.
Price	Purchase price.
Vendor	Company the hardware was purchased from. The drop-down for this field accesses the vendor table.
Warranty	 The length of the warranty period. Enter a number followed by "Y" (years), "M" (months) or "D" (days). For example, 1Y, 3M or 90D. If the purchase date has been filled in, the warranty period will be used to compute a default value for the next field, warranty expiration date.
Warranty Exp	Warranty expiration date. A default value is computed if Purchase Date and Warranty fields contain data.
Service Code	Identifies the company which is responsible for servicing the equipment. The drop-down list accesses the Service Company table.
Svc Expires	The date the service contract on this equipment expires. Reports can be generated giving you advance notice of when warranties and service contracts expire.
Depreciate	Check this box if the value of this equipment is depreciated over time.
Curr. Value	The current (depreciated) value of the equipment.



While entering data into the hardware window, you can click the Browse button to access the hardware table. The table can contain the basic descriptions of equipment that is widely used by your clients, thus speeding data entry.

The Hardware Table contains type, brand, model, price and warranty fields. Click **OK** to load the selected table entry into your hardware window.

The **Print** button prints a list of all entries in the table, while **Cancel** closes the table without updating your hardware window.



The Edit button loads the selected item into the Hardware Window and allows you to change the information. For a complete description of the fields, refer to the **Add** text above.



Click this button to delete the highlighted piece of hardware.



Click the House button to access house hardware. This enables you to move a piece of hardware from house inventory into the current configuration.

The top portion of the window contains a scrollable list of all hardware in house inventory. The scrollable lower area contains the detail of the selected item.

The **Add**, **Edit** and **Delete** buttons allow you to add to house inventory, edit an existing item or delete an item, respectively. The **Move** button takes the selected item out of house inventory and moves it into the current configuration. If the item in house inventory is part of a configuration, you will be asked if you want to move the single piece or the entire configuration.

<u>U</u>nlink

The Unlink button allows you to move the selected piece of hardware to another client or to house inventory. If you are moving to another client and that client has multiple configurations, you will be further prompted to select the desired configuration.

Help

Click this button to access help.



Click this button to close the hardware selection window.

Accessed from the button bar and the Utilities menu.

Ticklers are reminders that you can set for yourself or for another technician. If you are running the **HDALERT** program, you will be notified whenever one of your ticklers is due. While the ticklers are intended to notify you of follow-ups and new calls, they can be used as reminders for any task, including activities not related to HELP!Desk. For example, you can create a tickler to remind you of a meeting, an important birthday or anniversary, or when it's time to go home.

The Tickler window shows a scrollable list of all ticklers assigned to the person named in the top drop-down. Ticklers are added and edited in the lower portion of the window. To create a tickler, click the **Add** button. Tickler fields are described below.

Default Field Label	Description	
List of Ticklers For	This drop-down allows you choose whose ticklers will be listed. Unless you have "Tickle Supervisory" rights, you can only view your own ticklers.	
Technician	The recipient of the tickler.	
Event Date	The day the tickler is due.	
Event Time	The time the tickler is due.	
Event Description	The reason for the tickler.	

Tickler Window - Field Descriptions

The recipient of a tickler **must** be running **HDALERT** to receive notification.

HELP!Desk Alert

This section describes HELP!Desk Alert, the program that runs in the background and notifies you when ticklers are due.

HELP!Desk Alert

This program runs in the background and constantly monitors the tickler file. When a tickler is due, HELP!Desk Alert will notify you -- even if you you are not running HELP!Desk. When you are notified, you can clear the alarm, hit the snooze button to be reminded again later, or change the alarm date or time.

Generally, HELP!Desk Alert should be part of your Windows Startup group. This will cause the Alert program to start automatically whenever you load Windows. You can have HELP!Desk notify you if the Alert program is not running when you start HDWIN. The setting for this can be found under **File**, **Preferences**, **Program Defaults** in the HELP!Desk main menu.

To start HELP!Desk Alert manually, simply double-click on the icon in the HELP!Desk program group.

HELP!Desk Alert normally starts minimized (as an icon on your desktop) and begins monitoring your ticklers immediately. If this is your first time running HD Alert, you will be prompted to enter configuration information in the following window:

Configuration Window

The fields in the configuration window allow you to customize the way HD Alert works. Each of the fields are described in the table below.

Default Field Label	Description
Snooze	This is the number of minutes HD Alert will wait before alerting you again of an overdue tickler, after you have pressed the Snooze button.
Monitor	This is the frequency in which HD Alert will query the Tickler file to search for due or overdue ticklers. Five or ten minutes are generally good entries for this field.
Technician	This should be your HELP!Desk log-in name. Only ticklers assigned to the person whose name is here will be monitored by HD Alert.

These settings are written to the HDWIN.INI file in your \WINDOWS directory. You can change the settings here at any time by clicking the **Configure** button on the HD Alert main window.

HD Alert Main Window

The main window of HD Alert can be accessed by double-clicking the minimized HELP!Desk Alert icon on your Windows desktop. Options on this window allow you to change the settings for snooze, monitoring interval and technician name, return to monitoring mode, or close the HD Alert application.

The **Configure** window is described on the previous page. Monitoring is described below.

Monitoring the Tickler File

When the HD Alert program is minimized on your desktop, the monitoring mode is enabled. That means based upon the the monitor interval in your HD Alert configuration, the program will periodically scan the tickler file to see if any of your ticklers are due or overdue. If one or more ticklers require your attention, the alert window will open accompanied by an optional audible alarm.

The buttons in this window affect the highlighted tickler(s).

OK	Clears the highlighted tickler(s). Click this button to acknowledge the
	message(s).
Snooze	Click this button when you don't have time to deal with the tickler(s) right now,
	but want to be reminded again in a few minutes.
Change Alarm	This button allows you to change the alarm setting for a tickler. Upon clicking
	this button, you will have the opportunity to enter a new time and date for the
	alarm.

Select All Click this button to select (highlight) all of the ticklers in the window. This enables you to acknowledge, snooze or change the alarm date of all due or overdue ticklers in one step.

Multiple ticklers can be selected by holding down the Control ("Ctrl") and clicking the mouse on each selection. To select a range of ticklers, click on the first, then hold down the Shift key and click on the last.

Refer to the HELP!Desk Administrator's Guide for information on installation, configuration, database layouts and field descriptions.

Register Today

Please complete and mail your registration card if you have not done so already.

If at some point you need to change the name of the person HELP!Desk is registered under, simply indicate the name change along with your serial number and telephone number on company letterhead. Mail or fax the request to the address below.

We welcome your comments

We are constantly striving to make HELP!Desk the best product in its class. We welcome your questions, comments and suggestions.

Send all correspondence to:

Coastal Technologies / Webs*First*, Inc. HELP!Desk Support 615 Valley Road Montclair, NJ 07043-1403 USA Voice: 973 744-2900 Fax: 973 744-2129 Email: support@coastaltech.com Web: www.coastaltech.com Support+ Private Web Site: www.coastaltech.com/hdusers

For your convenience when calling, make a note of your serial number below.

Additional services available from the Coastal Technologies family of companies:

Tele-Training Data Conversion Customization Services Support Contracts Help Desk Training Classes

Custom Application Development Management Consulting Strategic Planning

Webs*First*

For Web Site Design, e-Commerce and Business Building Services, visit our site at www.websfirst.com

New Instruction specializes in customized on-site technical training andpublic seminars led by technology experts.Testing & Quality AssuranceProgramming LanguagesNetworking ConceptsMainframe