Administrator's Guide

HELP!Desk

Customer Service / Technical Support Software for Windows

Coastal
TECHNOLOGIES

HELP!Desk

Administrator's Guide

Coastal Technologies / WebsFirst, Inc.
615 Valley Road
Upper Montclair, NJ 07043-1403 USA

Voice: 973 744-2900   Fax: 973 744-2129
E-mail: support@coastaltech.com
www.coastaltech.com

Made and printed in the United States of America

Table of Contents

This page intentionally left blank.

Installation

This section will guide you through the installation of HELP!Desk for multi- and single-user environments

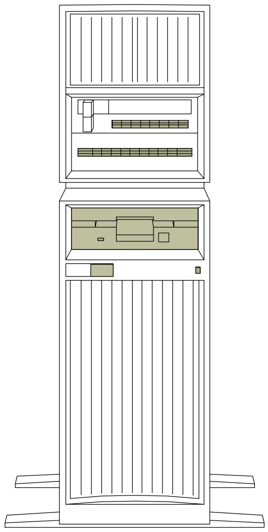
This page intentionally left blank.

Installation and Setup

This section covers the physical installation of HELP!Desk on both the file server and individual workstations. Since HELP!Desk is most often used in a multiuser environment, installation on a LAN will be discussed first.

Multiuser (Network) Installation

The diagram below shows the possible locations of all HELP!Desk files. For best performance, follow the "Recommended" file locations as indicated.



File Server

Required

- HELP!Desk Databases (HD*.DB*)
- Index Files (*.NTX, *.IA)
- Conversion Program (CONVERT.EXE, *.ATR)

Recommended

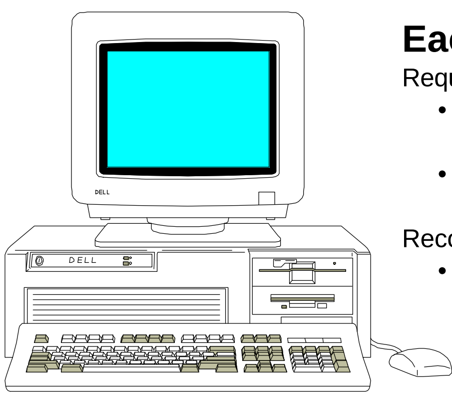
- Client Files (SETUP program and files for workstations)

Optional

- HELP!Desk Executables (HD*.EXE, HD*.PBD)

Optional - Not Recommended

- Runtime Files (*.DLL)
- ODBC Drivers



Each Workstation

Required

- Runtime Files (*.DLL) into \WINDOWS\SYSTEM or HELP!Desk executable directory (i.e. C:\HDWIN)
- ODBC Files into \WINDOWS\SYSTEM directory

Recommended for best performance

- HELP!Desk Executables (HD*.EXE, HD*.PBD)

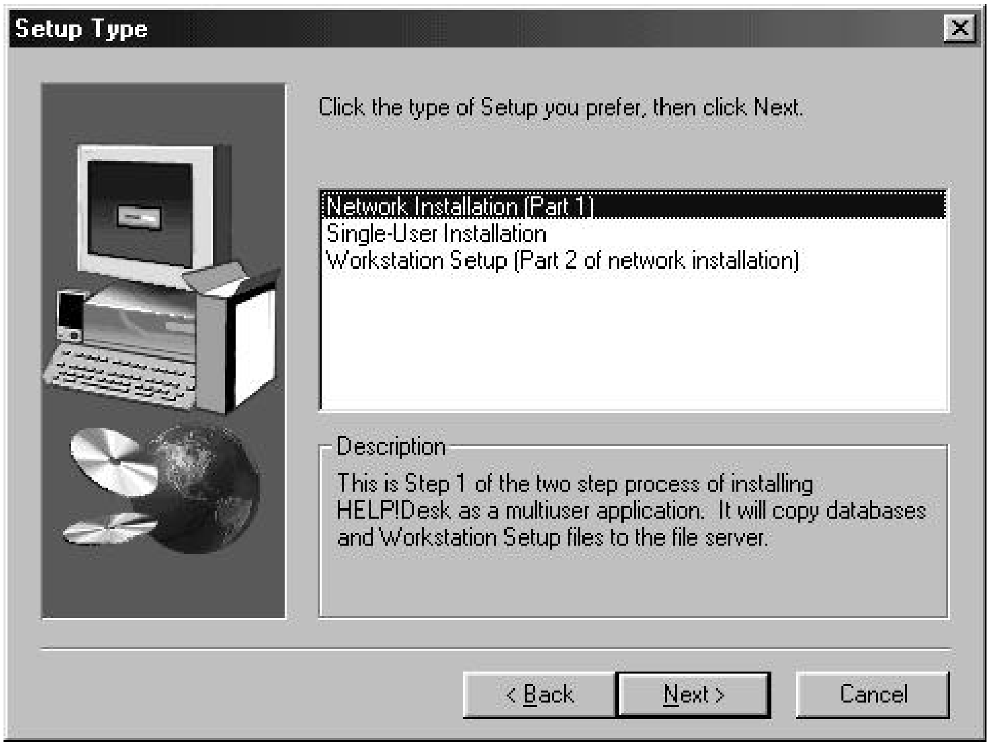
Installation Instructions

1.Insert the HELP!Desk CD into your CD-ROM drive.
2.The introduction program will start automatically.
3.Select "Install HELP!Desk".
4. Follow the prompts which are explained below.

The SETUP Program

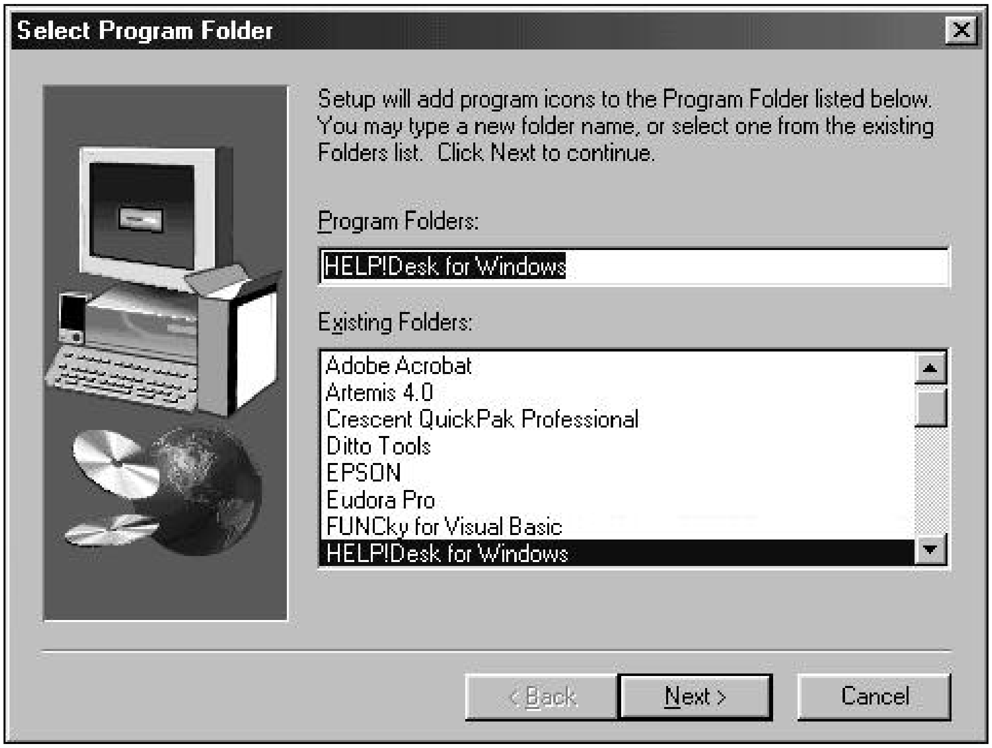
After SETUP initializes, you will be prompted with a welcome screen, the license agreement and a README file. This file contains the latest information on installing and running the software.

You will then be prompted to select the type of installation you want to perform. Select **Network Installation (Part 1)**.

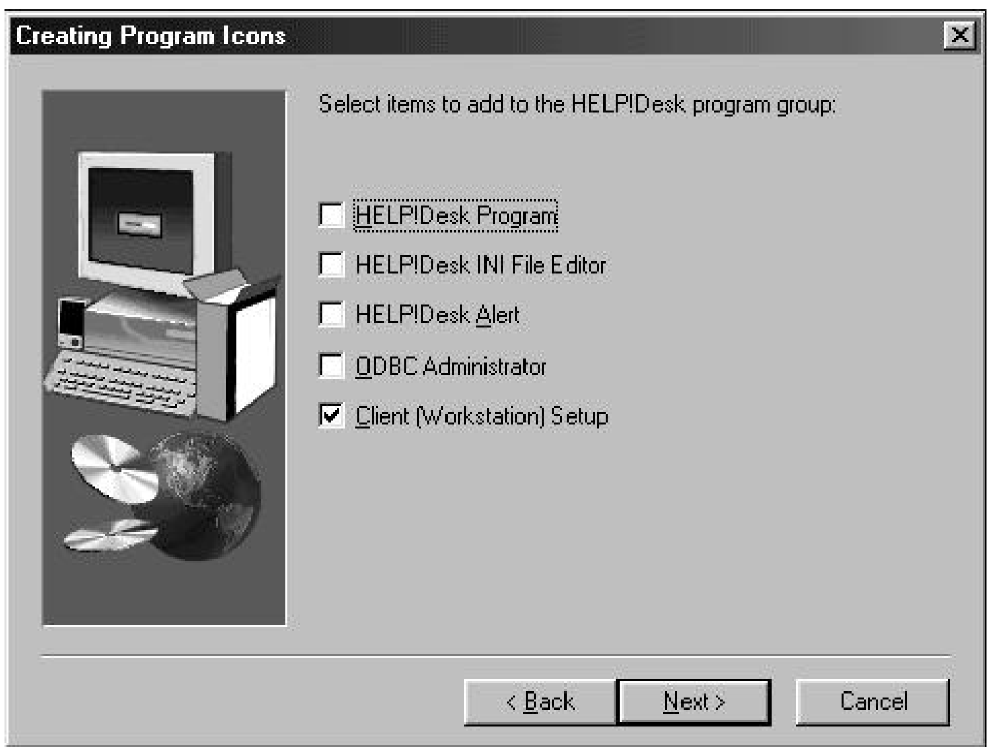


Next, enter your user information (name, company and serial number). You will then be prompted to select the components for installation. Accept the default components but be sure to **select a destination directory on your network**.

After the files are copied, you will be prompted to select a program folder.



Finally, you will be prompted to select icons to add to the HELP!Desk program group. Notice that this phase of setup only creates an icon for running the Client (Workstation) Setup.



This concludes part one of the network installation.

Part 2. Client (Workstation) Install

Once the installation to the server is completed, you need to run Client Setup from **each workstation** that will be accessing HELP!Desk. This routine will copy selected files to the local hard disk, create the ODBC connection to the databases and create (or update) the HELP!Desk program group.

Installation Instructions

Launch the Client Workstation Setup program using any of the following methods:

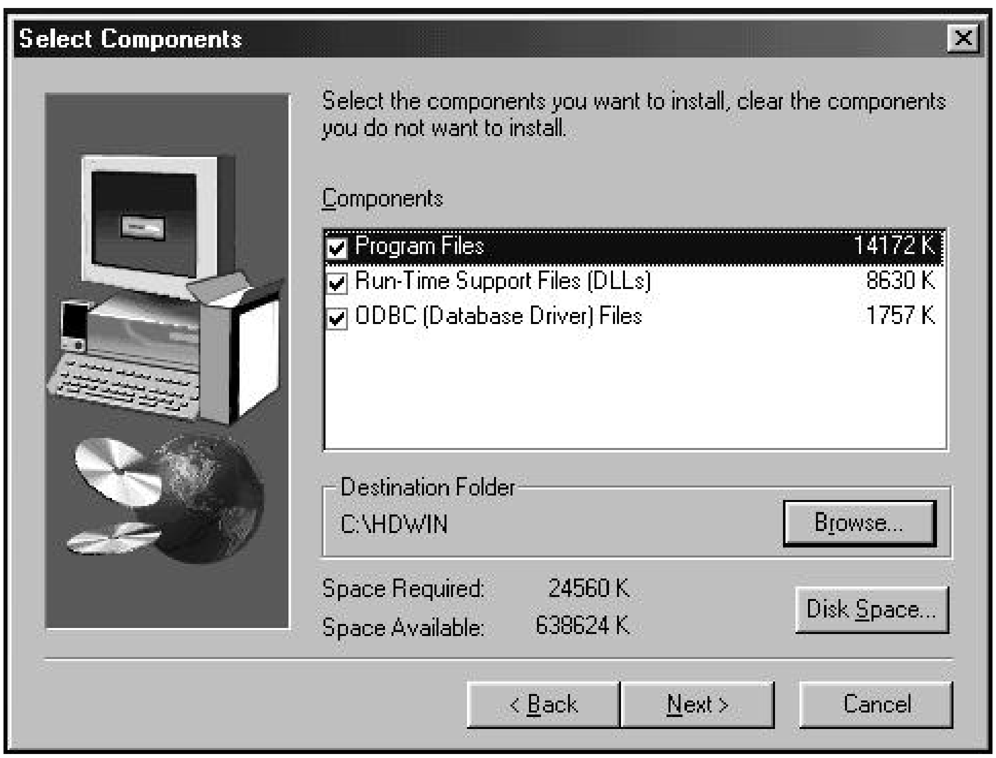
- Double-click the **Client Workstation Setup** icon in the HELP!Desk for Windows group.
- Use Windows Explorer to locate the HELP!Desk **CLIENT** directory on the network, then double-click on **SETUP.EXE**.
- Load the HELP!Desk CD-ROM and choose **Install HELP!Desk** from the menu.

The SETUP Program

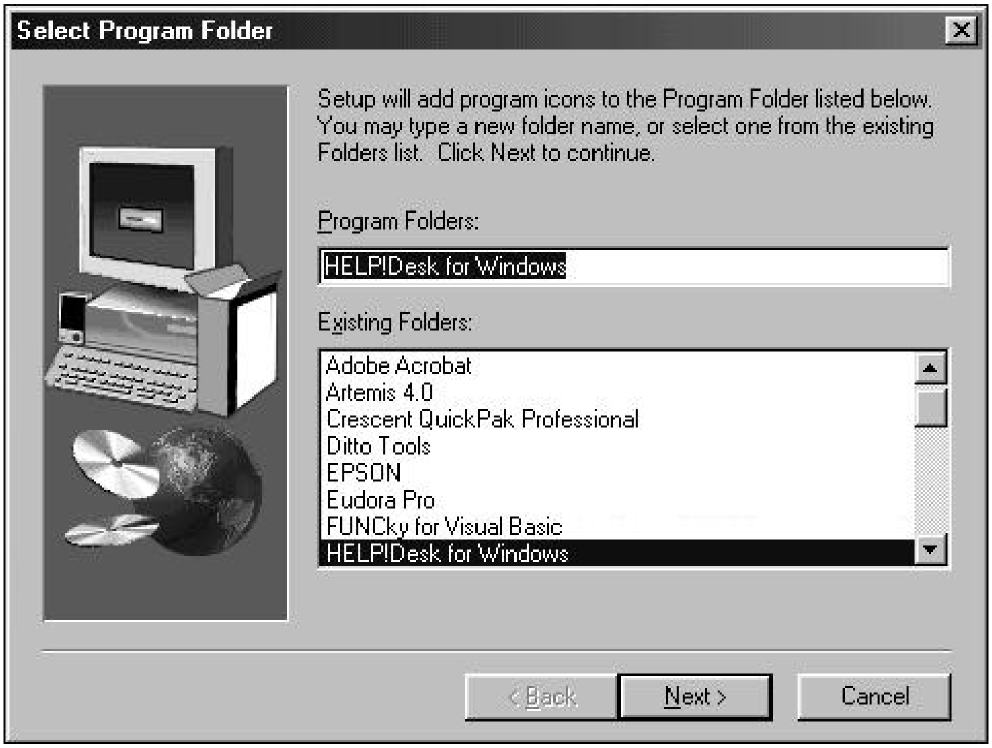
After SETUP initializes, a window will open showing the README file. This file contains the latest information on installing and running the software, and supersedes information found in the documentation.

If you are running SETUP from the HELP!Desk CD-ROM, you will be prompted to choose the Setup Type. Select **Workstation Setup (Part 2 of network installation)**.

You will then be prompted to select the modules you want to install. You should accept the components that have been checked. Change the destination folder if desired.



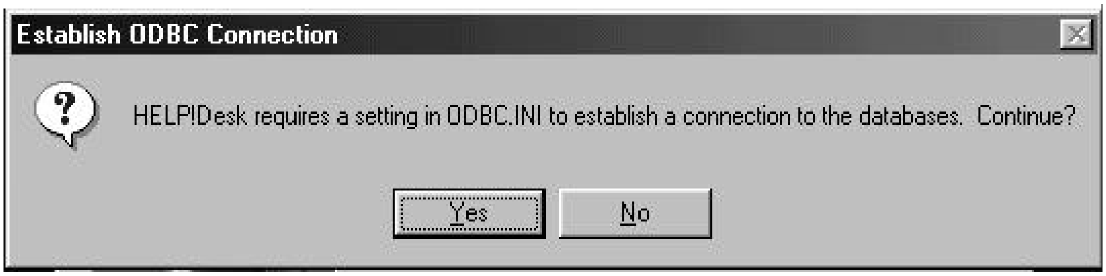
Next, you will be prompted to select the program folder. The default is *HELP!Desk for Windows*.



After the files are copied, you will be prompted with the following dialog box to create program icons:

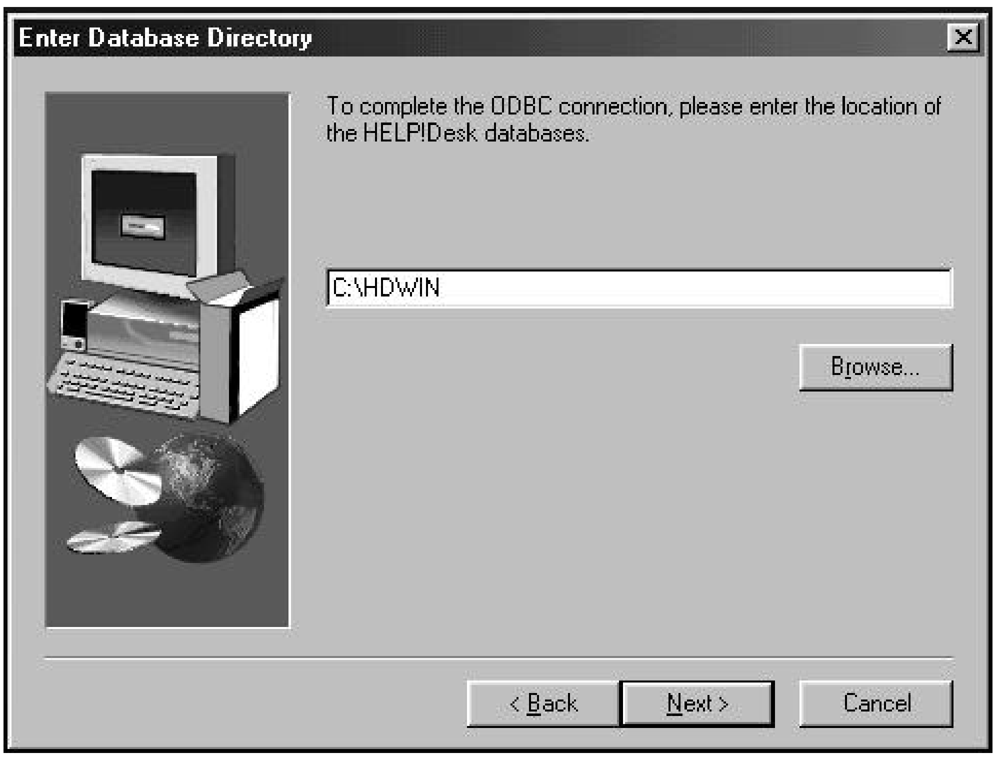
As the last step you have the opportunity to establish the ODBC connection to the HELP!Desk databases. The settings that are made by this process tell HELP!Desk where to find the databases and what methodology should be used to access them.

Unless there is a specific reason why you do not want SETUP to establish the connection, you should choose **Yes**.



To establish the connection, you must tell SETUP where on the file server the HELP!Desk databases are found.

Important If different workstations use different drive mappings to refer to the volume containing HELP!Desk, remember to adjust the ODBC connection accordingly.



Repeat Part 2 of the installation instructions for each workstation that will access HELP!Desk.

Congratulations! You are ready to launch HELP!Desk. Please turn to page 12 of this guide for instructions on using the program.

Single-User Installation

This section describes how to install HELP!Desk for use by a single user, on a single computer. This installation will require approximately 30 MB of disk space.

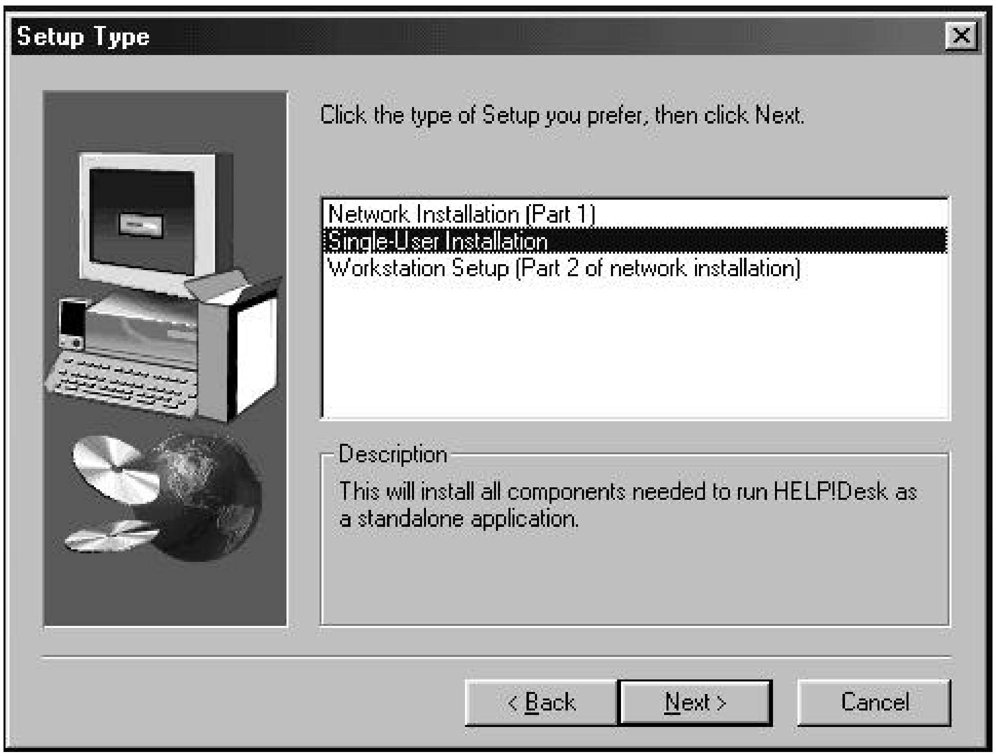
Installation Instructions

1. Insert the HELP!Desk CD-ROM into your computer.
2. The introduction program should start automatically.
3. Choose **Install HELP!Desk**.
4. Follow the prompts which are explained below.

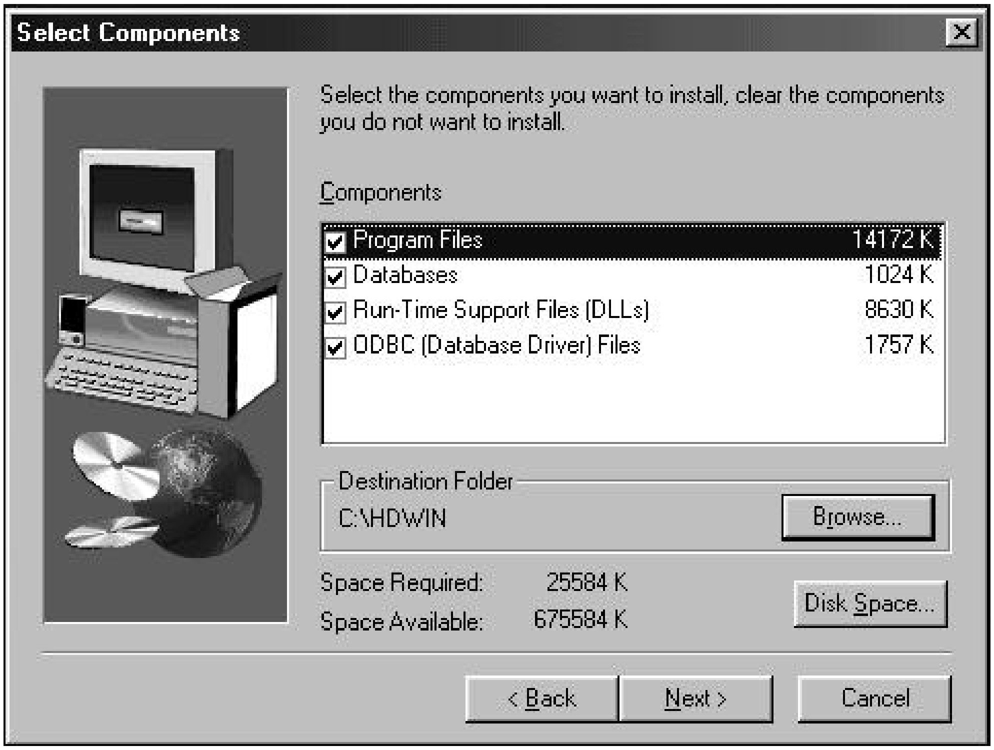
The SETUP Program

After SETUP initializes, you will be prompted with a welcome screen, the license agreement and a README file. This file contains the latest information on installing and running the software.

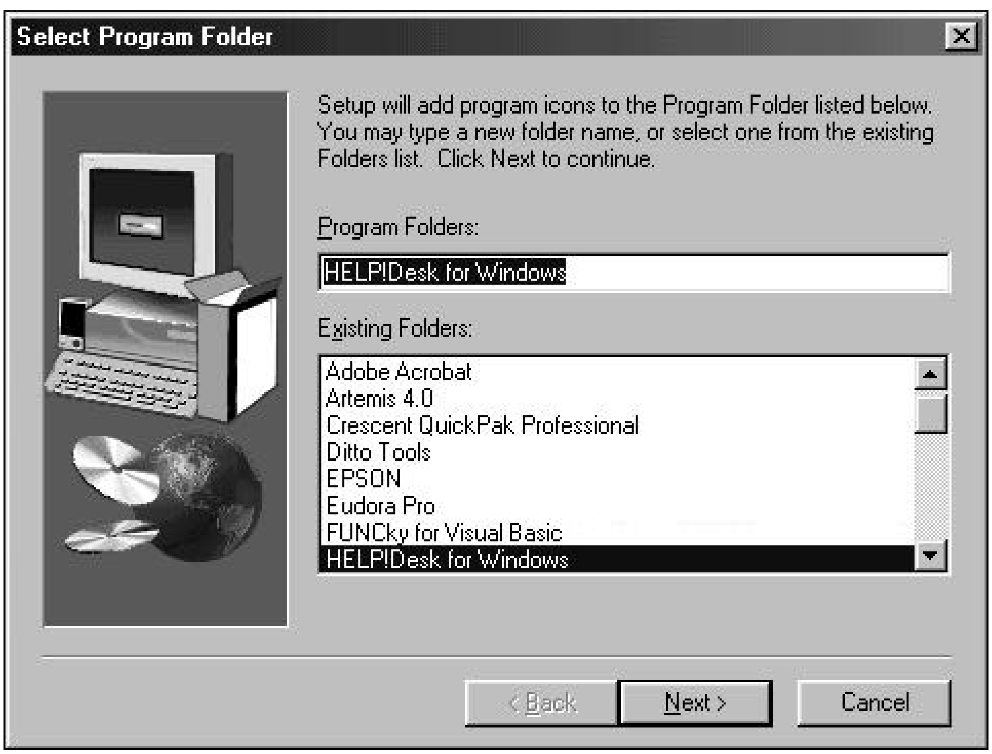
You will then be prompted to select the type of installation you want to perform. Select **Single-User Installation**.



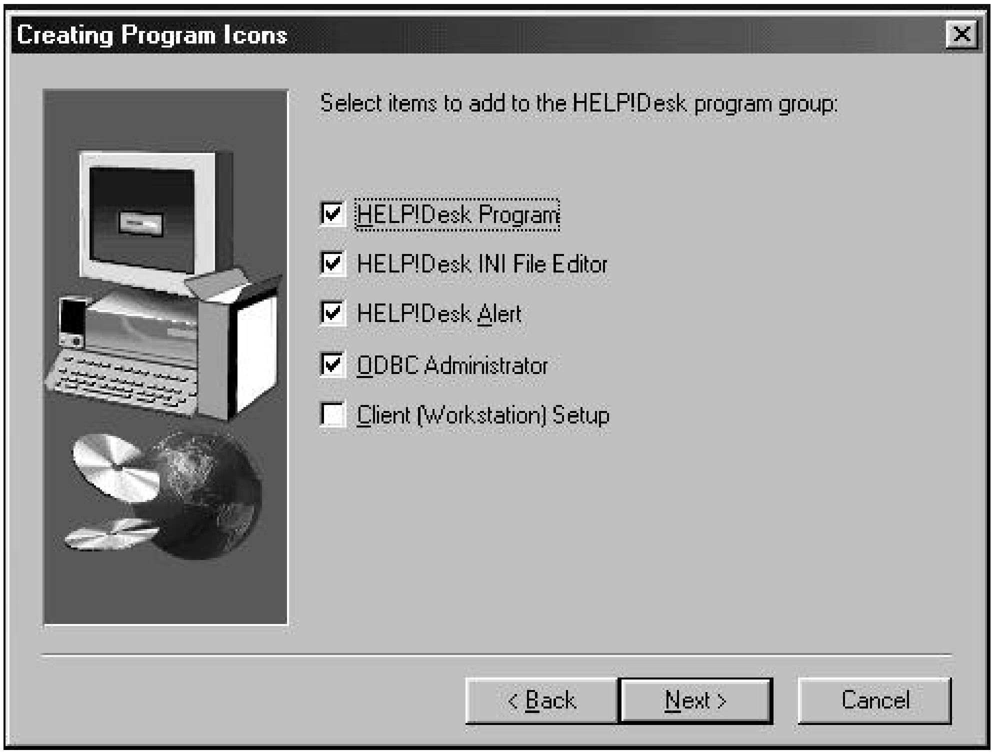
Next, enter your user information (name, company and serial number). You will then be prompted to select the components for installation. Accept the default components and change the destination directory if desired.



Next, you will be prompted to select the program folder. The default is *HELP!Desk for Windows*.

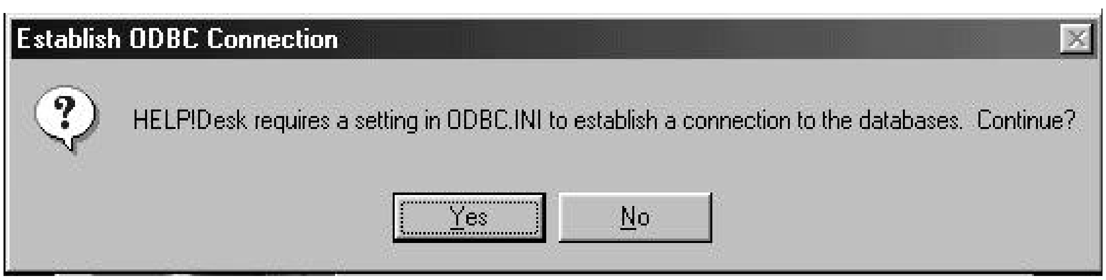


After the files are copied, you will be prompted with the following dialog box to create program icons:



As the last step you have the opportunity to establish the ODBC connection to the HELP!Desk databases. The settings that are made by this process tell HELP!Desk where to find the databases and what methodology should be used to access them.

Unless there is a specific reason why you do not want SETUP to establish the connection, you should choose **Yes**.



This completes the installation. Please turn to the following page to launch HELP!Desk.

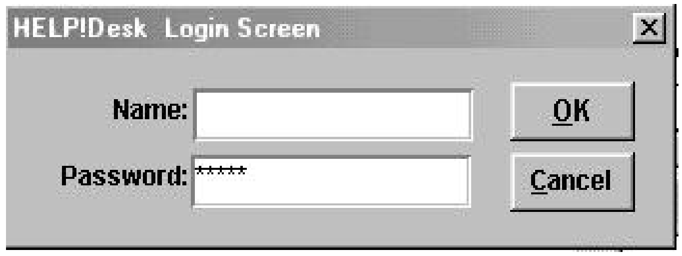
Directory Defaults

The default location for each module is listed in the table below.

Module	Default Directory
Programs	\HDWIN directory on the drive Windows is installed upon.
Databases	The directory chosen for the programs.
Runtime DLLs	The directory chosen for the programs.
ODBC	\WINDOWS\SYSTEM.

Starting HELP!Desk

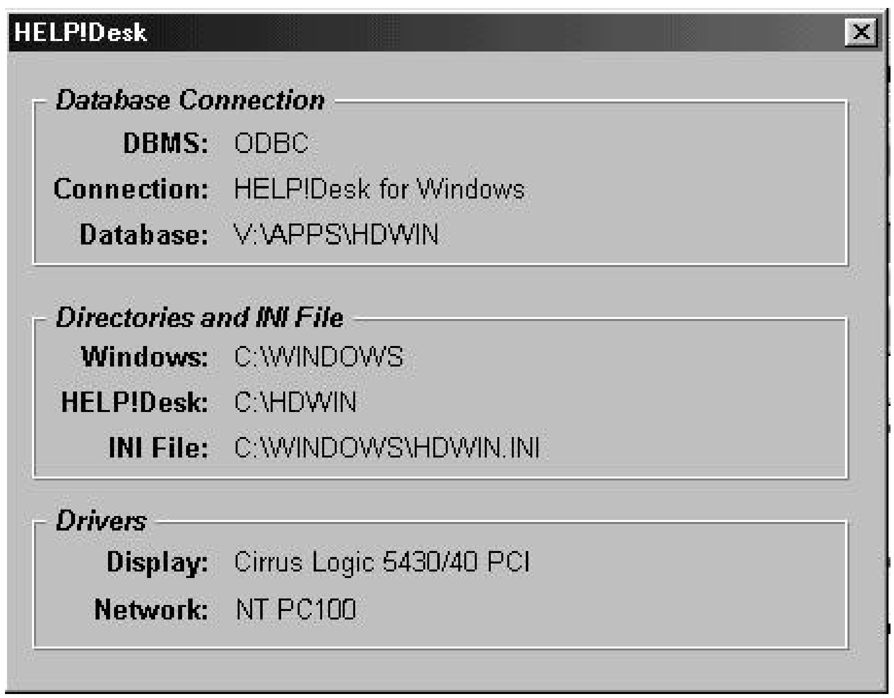
To launch the program, click Start, Programs, HELP!Desk for Windows, HELP!Desk. When the program begins, you will be prompted with the log-in window:



Enter your log-in name and password. Until you have added users to the security database (see page 19), use the default log-in: Enter **HD** for **both** the **log-in name** and **password**.

Troubleshooting Tip

Press Alt-H at the log-in window to display program configuration information.



The most common log-in problem reported by HELP!Desk users involves an incorrect ODBC setting of the database directory. If you experience an error when logging in, verify that the database directory reported in this window is actually the directory where the HELP!Desk data resides. On network drives, be especially certain that the drive letter has been properly mapped at the workstation.

If you need to adjust the directory setting, close HELP!Desk and run **ODBC Administrator** from the HELP!Desk for Windows folder. Double-click the “HELP!Desk for Windows” data source and make the necessary adjustments to the directory setting.

Data Conversion Program

This section explains how to import your existing HELP!Desk 2.0 (DOS version) data into your new installation of HELP!Desk for Windows.

This page intentionally left blank.

Data Conversion Program

This section explains the operation of the HELP!Desk Data Conversion program (CONVERT.EXE). This program converts data files from HELP!Desk 2.0 to the format required by HELP!Desk for Windows. The conversion program **copies** your old data to the new format -- your old files remain intact. However, you should still have a current backup of your data files before proceeding.

> If you do not want to use data from a DOS version of HELP!Desk with version 3, then this section does not apply to you.

To start the conversion program, double-click the Conversion Program icon in the HELP!Desk program group.

Alternatively, your can run the conversion program from the DOS prompt. Change to the HELP!Desk 3.0 data directory and enter **CONVERT** at the DOS prompt.

```
C:\HDWIN> CONVERT
```

When the program begins, you will be prompted with the main menu.

The menu choices are as follows. The first two are described in greater detail below.

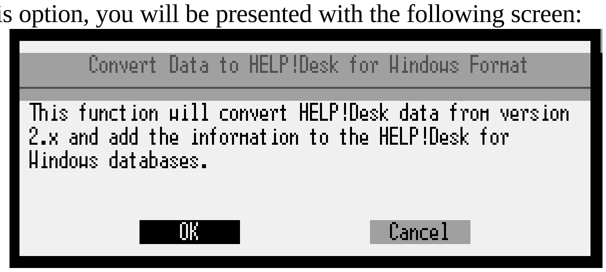
C. Copy & Convert HELP!Desk 2.x to HDWIN
Choose this option to import existing 2.0 data to HDWIN.

S. Convert HELP!Desk Technician 2.x Data
Choose this option to import your 2.0 Solutions (HDT Database) into HDWIN.

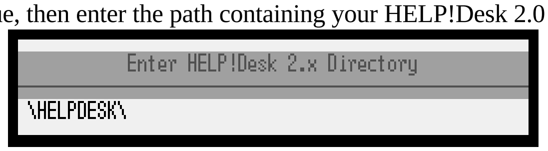
E. Exit Program
Exit the conversion program and return to the operating system.

C. Copy & Convert HELP!Desk 2.x to HDWIN

After selecting this option, you will be presented with the following screen:



Select **OK** to continue, then enter the path containing your HELP!Desk 2.0 data files.

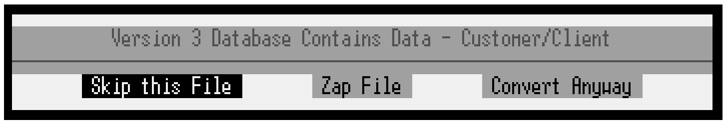


If you enter an incorrect path, the cursor will return to the directory prompt.

Once the path is entered correctly, the Conversion Progress window will open. This window shows all files that have been or are currently being processed.

During processing of the Control File, the Conversion Program will prompt you for your serial number if it cannot determine it from your 2.0 files.

Once these questions have been answered, the conversion process will continue without interaction. Only if a version 3.0 data file is found to already contain data will you receive a prompt similar to the one below:



If you have previously converted the data in this file (or you simply do not want the old data converted) choose **Skip this File**. The conversion program will skip over the file and continue to the next one.

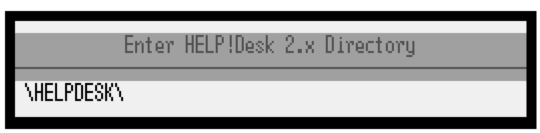
The option **Zap File** will delete all contents of the HDWIN file and proceed with the conversion.

Choose **Convert Anyway** only if you have entered data into HDWIN that is **not** present in the 2.0 file -- and you want to keep the HDWIN data. If the file was previously converted and you choose this option, all records in the file will be duplicated.

When this procedure completes, all of your 2.0 data except Solutions will be imported into HDWIN. To import your Solutions, continue with the following step.

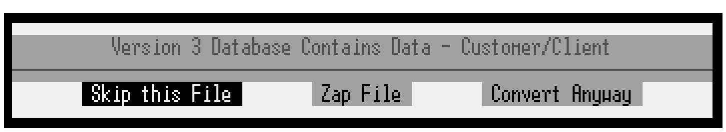
S. Convert HELP!Desk Technician 2.x Data

This option will import your text and graphical Solutions databases into HDWIN. Upon making this selection you will be prompted to enter the path containing your HELP!Desk 2.0 data files.



If you enter an incorrect path, the cursor will return to the directory prompt.

Once the path is entered correctly, the Conversion Progress window will open. This window shows all files that have been or are currently being processed. The conversion process will normally continue without any further interaction from you. Only if a version 3.0 data file is found to already contain data will you receive a prompt similar to the one below:



If you have previously converted the data in this file (or you simply do not want the old data converted) choose **Skip this File**. The conversion program will skip over the file and continue to the next one.

The option **Zap File** will delete all contents of the HDWIN file and proceed with the conversion.

Choose **Convert Anyway** only if you have entered data into HDWIN that is **not** present in the 2.0 file -- and you want to keep the HDWIN data. If the file was previously converted and you choose this option, all records in the file will be duplicated.

Important
After importing data into HDWIN, you **must** reindex the databases by following the instructions below.
If you do not, the system may behave erratically.

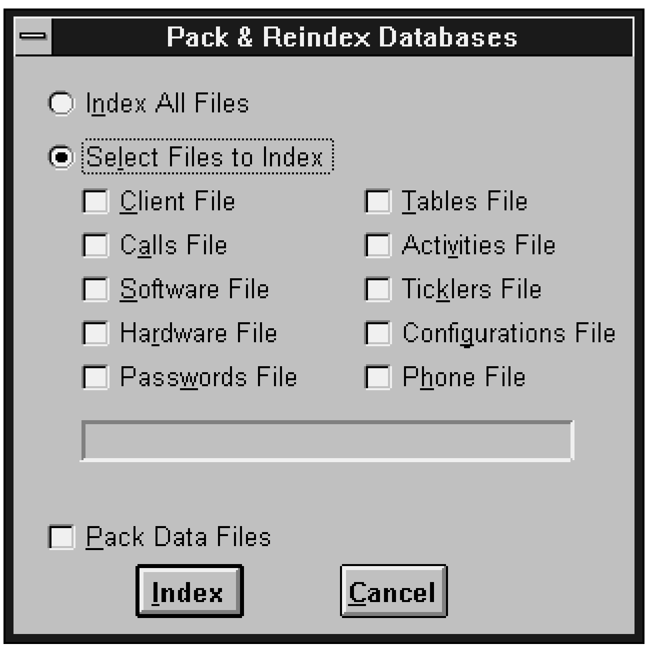
Reindexing the databases

Start HDWIN as you normally would. Log-in to the program and close any windows that may be open (such as Open Calls, System Bulletin, etc.).

HELP!Desk ships with a default login name of **HD**. The password is also **HD**. This user has Supervisor access and should be deleted after you set up your own user id.

No other users should be accessing the HELP!Desk files when reindexing.

Choose **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.



Click the radio button for **Index All Files**, then click **Index**. A progress bar is shown to indicate the reindexing status.

When this completes, you must index the Solutions module. This is accomplished by selecting **Utilities, Solutions, Rebuild Solutions Index**. This function reconstructs the special text searching indices that are used by the Solutions module. If you have a large number of solutions, this function may take several 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.

This page intentionally left blank.

Program Setup

This section describes the basics of setting up users, security and customizing field labels and program defaults.

This page intentionally left blank.

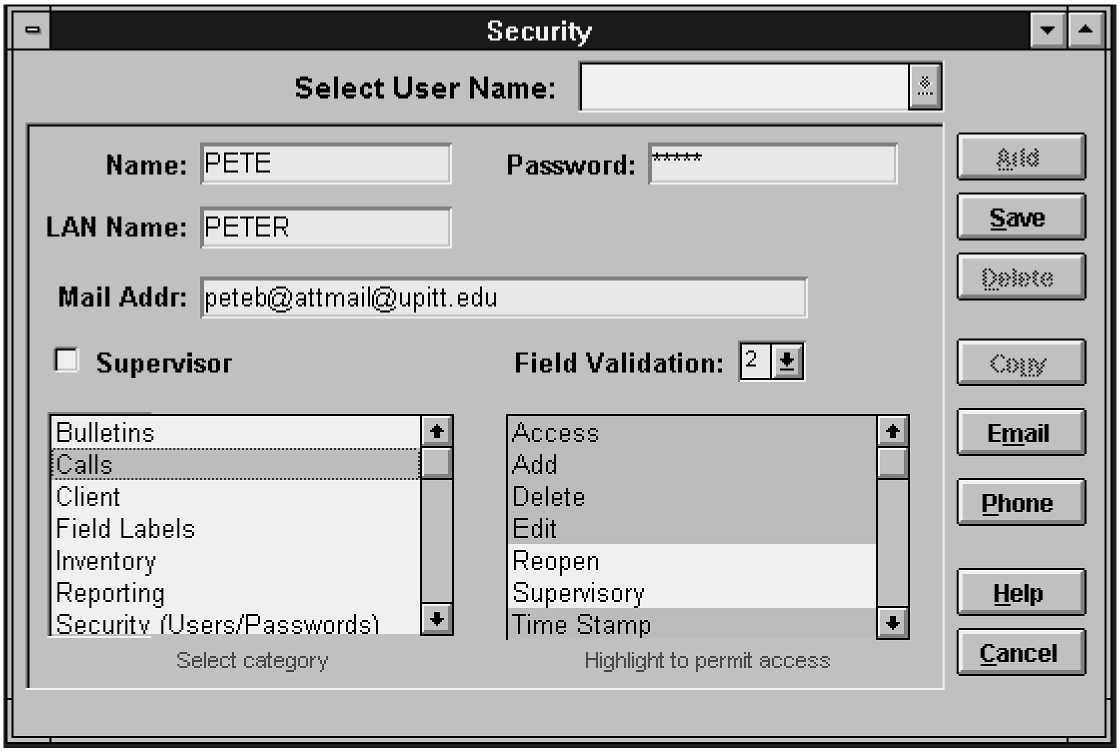
Program Setup

The first step in preparing HELP!Desk for use by other people is to create user accounts and set each user's access rights. Following that, you may choose to change the program defaults and modify field and button labels.

Creating User Accounts

Choose **Utilities | Security** from the menu. This option allows you to build the database of authorized users of the HELP!Desk software and set each person's individual access rights.

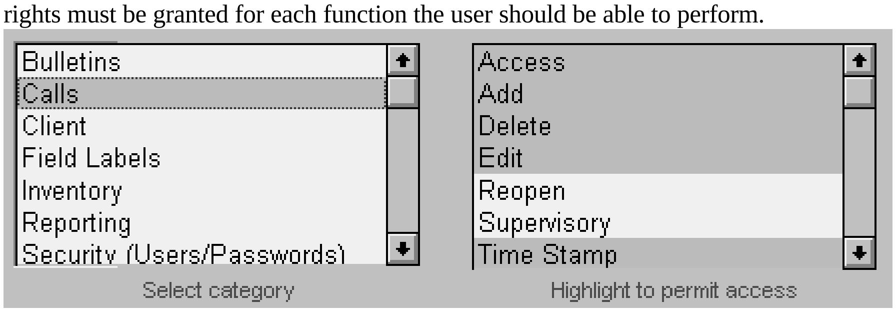
If you imported data from HELP!Desk 2.0, your users will have been migrated to the security file, but you will still need to set up permissions for each account.



HELP!Desk ships with a single user, **HD**. You should delete this user after you have created another user with the **Supervisor** privilege.

To add a user, click the **Add** button. Enter the 1-12 character user name, a password for the user, and the user's network login name. To grant the user supervisory access to the program, check the **Supervisor** box. Assign a field validation value, described in Table 2 below, to the account. A value of "2" is recommended for a Supervisor, "2" or "3" for other users.

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.



This is done by first selecting 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. Each permission is described in Table 3 below.

If more that one user will have similar permissions, use the **Copy** button to duplicate an account. Then you only need to change basic information such as **Name**, **LAN Name** and **Password**.

Security Window - Drop Down and Buttons Table 1

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.
Copy	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 Table 2

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. *This option is not recommended, because mistyped words and inconsistent entries will clutter the table.* **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. *This is the best choice if you are building tables dynamically while you use HELP!Desk.* **3** The entered value must match an entry in the table. *Choose this option if you want to restrict data entry to values that have already been added to the tables.*

Description of Categories and Permissions Table 3

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 Add Delete Edit Supervisory	If not granted, the user will not be able to access clients, regardless of other settings in this category. Add clients. Delete clients. Edit client information. *Not used.*
Field Labels	Access Global Personal	Access the **File, Preferences, Screen Design** window. Edit the global field labels. Create and edit personal field labels.
Inventory	Access Add Delete Edit Supervisory Update House	If not granted, the user will not be able to access inventory (configurations, hardware or software), regardless of other settings in this category. Add new inventory. Delete existing inventory. Edit existing inventory. Copy software in the House Software window. Update (add/edit/delete) house inventory.
Reporting	Access	View and print any report. *This setting 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).

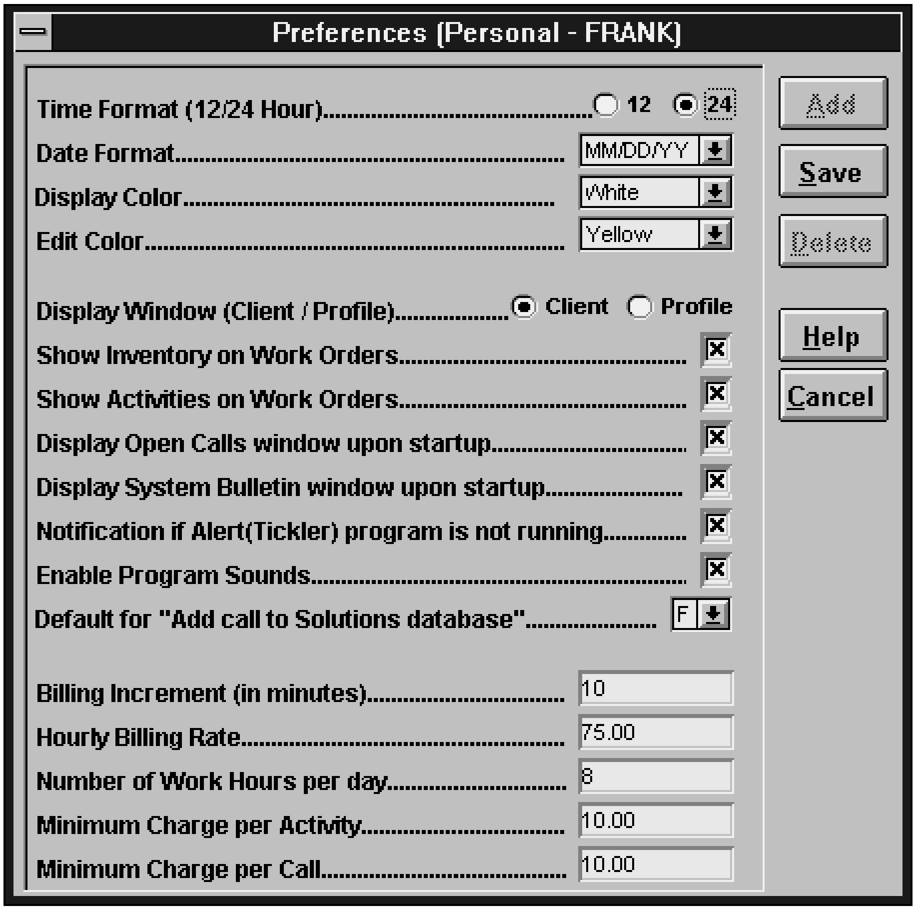
Solutions	Access	If not granted, the user will not be able to access the Solutions window, regardless of other settings in this category.
	Add	Manually add entries to the solutions database.
	Delete	Delete existing solutions.
	Edit	Edit existing solutions.
Tables	Access	If not granted, the user will not be able to access Table Maintenance, regardless of other settings in this category.
	Add	Add entries to tables.
	Delete	Delete existing table entries.
	Edit	Edit existing table entries.
Utilities	Archive	*Not implemented.*
	Global Update	*Not implemented.*
	Import/Export	*Not implemented.*
	Reindex	Allows the user to rebuild index files.
	NetCensus	Import data from NetCensus or PC Census.
	Tickle Supervisory	View ticklers for users other than yourself.

Important: Make sure at least one user has **Supervisor** access before you delete the default user, **HD**, that shipped with HELP!Desk.

Setting Program Defaults

These settings allow you to tailor features of HELP!Desk to meet your organization's needs. The program supports a global setting as well as personal settings. Security restrictions control whether a user has access to global, personal or both. As the System Administrator, you should set the **Global** preferences. These will then be the default for all users.

Begin by selecting **File | Preferences | Program Defaults** from the menu.



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.

Each field is described in the table below.

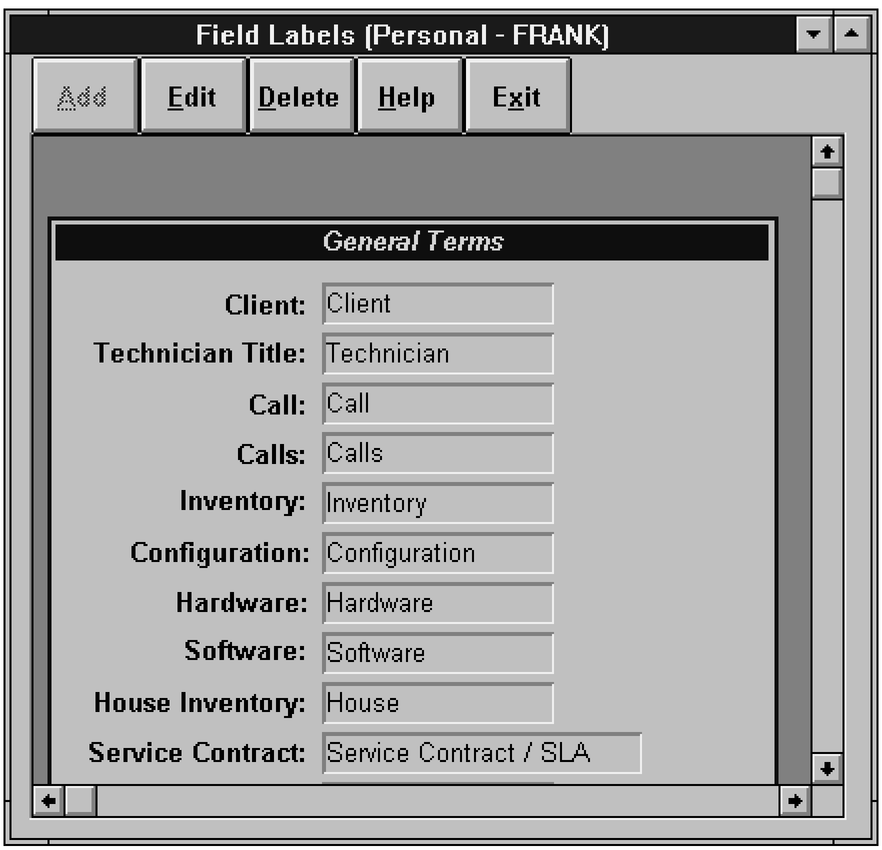
Field Heading	Description
Time Format	Choose 12 or 24 hour formats for default entry in time fields.
Date Format	Select the format for display and entry of dates.
Display Color	This color is used as the background for data that is being viewed.
Edit Color	The background color for data that is being edited.
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.

Customizing Field and Button Labels

HELP!Desk can be further tailored to your organization by customizing field and button labels. The program supports a global setting as well as personal settings. Security restrictions control whether a user has access to global, personal or both. As the System Administrator, you should set the **Global** field labels. These will then be the default for all users.

Begin by selecting **File | Preferences | Screen Design** from the menu.



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, two-column 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.

HELP!Desk is now ready for use

This concludes the setup instructions for HELP!Desk. Simply inform each user of his or her login name and password and you’re ready to go!

This page intentionally left blank.

Database Information

This section covers the ODBC connection to the HELP!Desk databases, links between tables, file structures and field descriptions.

This page intentionally left blank.

ODBC Connection

This document contains information about the entries in various INI files that effect the HELP!Desk for Windows ODBC connection. NOTE: This file is provided for informational purposes only. The HELP!Desk **Setup** program or **ODBC Administrator** should be used to establish the database connection. Directly modifying the ODBC INI files can result in ODBC no longer working properly. HELP!Desk for Windows is designed to work with the Q+E dBASE ODBC driver that is supplied by Powersoft for use with Powerbuilder Enterprise. The HELP!Desk license agreement prohibits the use of any other database connection or any driver other than PBDBF04.DLL.

There are three files that have entries specific to HELP!Desk for Windows. They are ODBCINST.INI, ODBC.INI, and HDWIN.INI. Following is a list of the entries in each of these files that effect the HELP!Desk for Windows connection.

File: ODBCINST.INI
Location: C:\WINDOWS (The Windows directory)

This entry tells ODBC that a driver called "PBE Q+E dBASEFile" is installed on the system. This is the ODBC driver that HELP!Desk for Windows uses.

```
[ODBC Drivers]
PBE Q+E dBASEFile=Installed
```

This entry describes the driver "PBE Q+E dBASEFile" for ODBC. It tells it what DLL to use for the driver and what DLL to use for the setup routines.

```
[PBE Q+E dBASEFile]
Driver=C:\WINDOWS\SYSTEM\PBDBF04.DLL        (The Windows System directory)
Setup=C:\WINDOWS\SYSTEM\PBDBF04.DLL         (The Windows System directory)
```

File: ODBC.INI
Location: C:\WINDOWS (The Windows directory)

This entry tells ODBC that there is a data source named "HELP!Desk for Windows" and tells ODBC to use the driver "PBE Q+E dBASEFile".

```
[ODBC Data Sources]
HELP!Desk for Windows=PBE Q+E dBASEFile
```

This entry defines the data source "HELP!Desk for Windows" for the associated ODBC driver.

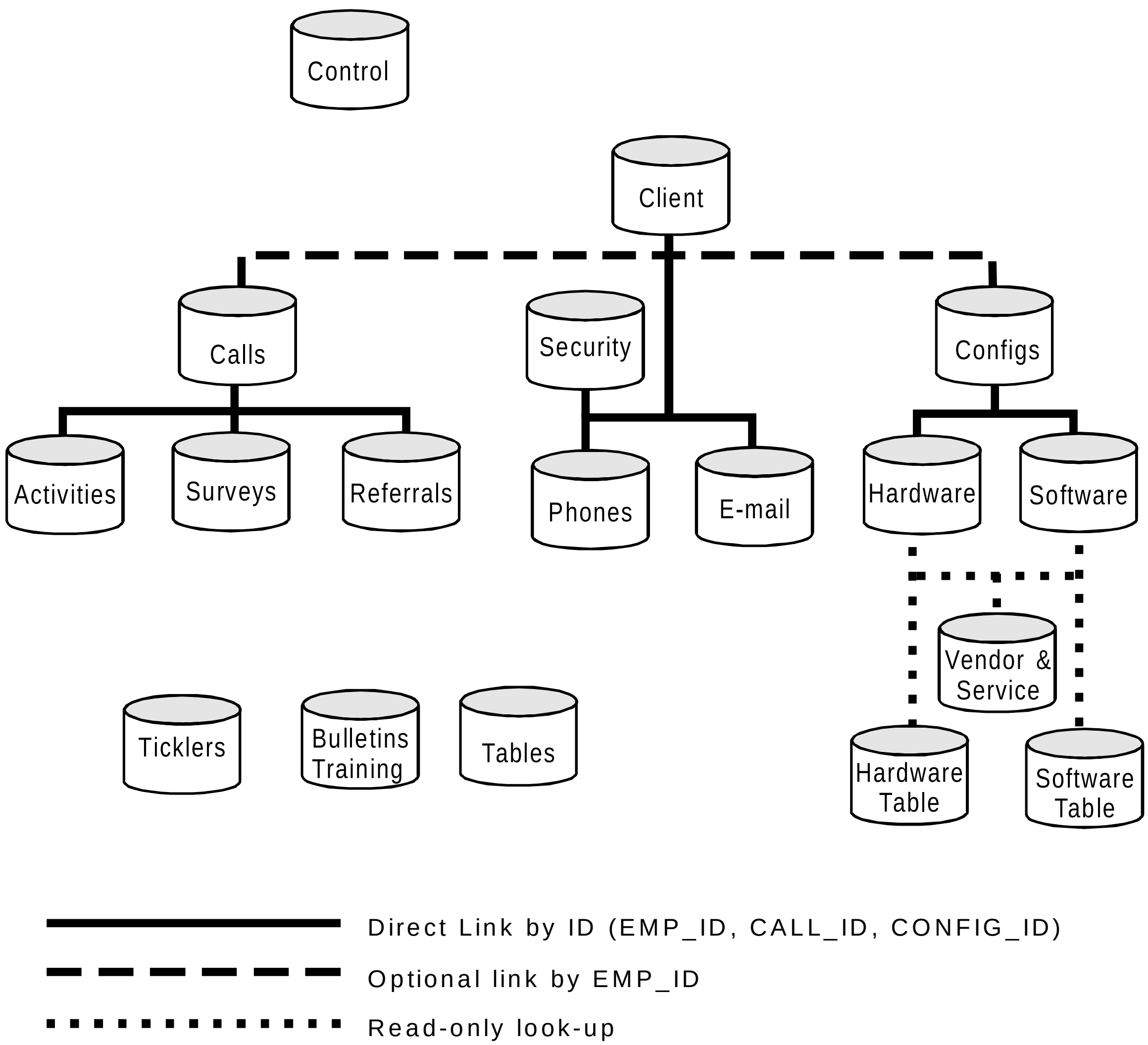
```
[HELP!Desk for Windows]
Driver=C:\WINDOWS\SYSTEM\PBDBF04.DLL     (The Windows System directory)
Description=HELP!Desk for Windows
Database=C:\HDWIN                        (HELP!Desk data directory)
Locking=Record                           (Locking is done at the record level)
FileOpenCache=
Charset=ANSI
CreateType=Clipper                       (Use Clipper index files)
LockCompatibility=Clipper                (Use Clipper locking methods)
CacheSize=
IntlSort=0
```

File: HDWIN.INI
Location: C:\WINDOWS (The Windows directory)

This entry specifies the ODBC connection information to HELP!Desk for Windows. The DbParm entry specifies which data source in ODBC.INI is to be used for the connection.

```
[database]
DBMS=ODBC
DbParm=ConnectString='DSN=HELP!Desk for Windows'
```

Relational Database Diagram



The following diagram shows the relationship between individual tables.

Database Structures

The HELP!Desk database tables are dBASE III+ compatible. Structures of the major tables are listed below. Any field ending with "_ID" is maintained by the system as a unique ID and / or to relate the record to another table.

HD_ACTIV.dbf (Activities)

Field	Field Name	Type	Width
1	ACTIV_ID	Numeric	10
2	CALL_ID	Numeric	8
3	TICKLE_ID	Numeric	8
4	START_DATE	Date	8
5	START_TIME	Character	6
6	END_DATE	Date	8
7	END_TIME	Character	6
8	DURATION	Numeric	6
9	CHARGE	Numeric	8.2
10	AUTO_COMPT	Logical	1
11	ACTIVITY	Character	30
12	DETAIL	Memo	10
13	TECHNICIAN	Character	12
14	PRIORITY	Character	1
15	STATUS	Character	1
16	STAT_DATE	Date	8
17	STAT_TIME	Character	6
18	TICKLE	Logical	1
19	ASSIGN_TO	Character	12
20	DUR_CHAR	Character	10
21	START_CHAR	Character	6
** Total **			167

HD_BOARD.dbf (Bulletins and Training Schedules)

Field	Field Name	Type	Width
1	BULLET_ID	Numeric	8
2	REC_TYPE	Character	1
3	CREATOR	Character	12
4	LAST_UPDAT	Date	8
5	SUBJECT	Character	30
6	DETAIL	Memo	10
7	UPDATABLE	Character	1
** Total **			71

HD_CALLS.dbf (Calls)

Field	Field Name	Type	Width
1	CALL_ID	Numeric	8
2	EMP_ID	Numeric	8
3	HELPER	Character	12
4	CALL_DATE	Date	8
5	CALL_TIME	Character	6
6	OPEN_TIME	Numeric	4
7	CALL_TYPE	Character	2
8	PROBLEM	Memo	10
9	RESOLUTION	Memo	10
10	CHARGE	Numeric	8.2
11	SUBJECT	Character	30
12	PRODUCT	Character	20
13	PRIORITY	Character	1
14	FOLLOW_UP	Character	1
15	F_TIME	Character	6
16	F_DATE	Date	8
17	STAT_TIME	Numeric	4
18	ADD_TIME	Numeric	8
19	ADUR_CHAR	Character	10
20	ADD_CHARGE	Numeric	8.2
21	DURATION	Numeric	6
22	DUR_CHAR	Character	10
23	CALL_BACK	Character	1
24	NTX_TIME	Character	4
25	ASSIGNEE	Character	12
26	ACCOUNT_NO	Character	10
27	RMA_NUMBER	Character	10
28	ADDTO_TECH	Character	1
29	RATING	Numeric	1
30	LUPDATE	Date	8
31	RES_CODE	Character	30
32	ESCAL_DATE	Date	8
33	NUM_ACTIVS	Numeric	3
34	CALL_STAT	Character	1
35	NUM_REFER	Numeric	3
36	ACKNOWLEDG	Character	1
37	CUST_CARE	Character	1
** Total **			283

HD_CLIEN.DBF (Clients)

Field	Field Name	Type	Width
1	EMP_ID	Numeric	8
2	LOC_CODE	Character	3
3	REC_TYPE	Character	1
4	EMP_NO	Character	11
5	FIRST_NAME	Character	15
6	LAST_NAME	Character	20
7	TITLE	Character	30
8	COMPANY	Character	40
9	ADDR1	Character	40
10	ADDR2	Character	40
11	CITY	Character	20
12	STATE	Character	15
13	ZIP	Character	10
14	COUNTRY	Character	15
15	BUILDING	Character	4
16	ZONE	Character	4
17	FLOOR	Character	4
18	OFFICE	Character	4
19	DEPARTMENT	Character	30
20	GROUP	Character	20
21	PHONE	Character	16
22	EXTENSION	Character	5
23	NOTES	Memo	10
24	ACCOUNT_NO	Character	10
25	NUM_CALLS	Numeric	5
26	ASSET_TAG	Character	12
27	NETWORK_ID	Numeric	6
28	CONTRACT	Character	6
29	CONT_EXP	Date	8
30	MIN_CHARGE	Numeric	8.2
31	PRIORITY	Character	1
32	INVC_TYPE	Character	6
33	CONTEXP_HR	Numeric	6
34	EXPIRE_BY	Character	1
35	CONTEXP_CH	Character	6
** Total **			441

HD_CNTRL.dbf (Control file)

Field	Field Name	Type	Width
1	COMPANY	Character	30
2	HEADING1	Character	40
3	HEADING2	Character	40
4	HEADING3	Character	40
5	SOUND_ON	Logical	1
6	EMP_ID	Numeric	6
7	CFG_ID	Numeric	6
8	HDWR_ID	Numeric	6
9	SFTWR_ID	Numeric	6
10	CALL_ID	Numeric	6
11	ACTIV_ID	Numeric	6
12	REFER_ID	Numeric	6
13	ORDER_ID	Numeric	6
14	TRAIN_ID	Numeric	6
15	WORK_ID	Numeric	6
16	TICKLE_ID	Numeric	6
17	SERVICE_ID	Numeric	6
18	NETWORK_ID	Numeric	6
19	VENDOR_ID	Numeric	6
20	PO_ID	Numeric	6
21	PHONE_ID	Numeric	6
22	MAIL_ID	Numeric	6
23	BULLET_ID	Numeric	6
24	SURV_ID	Numeric	6
25	SEQUENCE	Numeric	8
26	LASER_LOGO	Logical	1
27	SERIAL_NO	Character	8
28	HRLY_RATE	Numeric	7.2
29	DEPR_DATE	Date	8
30	DEPR_RATE	Numeric	3
31	LOC_CODE	Numeric	2
(Control File continued)			
** Total **			303

HD_EMAIL.dbf (E-mail addresses)

Field	Field Name	Type	Width
1	MAIL_ID	Numeric	8
2	EMP_ID	Numeric	8
3	CARRIER	Character	20
4	ADDRESS	Character	50
** Total **			87

HD_ENTRY.dbf (Users / Security)

Field	Field Name	Type	Width
1	NAME	Character	12
2	PASSWORD	Character	12
3	LAN_NAME	Character	20
4	MAIL_ADDR	Character	50
5	DEPT	Character	30
6	PREF_FILE	Character	8
7	PREF_DIR	Character	50
8	SUPERVISOR	Character	1
9	FIELD_VAL	Character	1
10	CLIENT	Character	10
11	CALL	Character	10
12	INVENTORY	Character	10
13	TABLES	Character	10
14	FIELD_LBLS	Character	10
15	BULLETINS	Character	5
16	TRAINING	Character	5
17	SECURITY	Character	5
18	SOLUTIONS	Character	10
19	REPORTING	Character	10
20	UTILITIES	Character	10
21	EMP_ID	Numeric	8
** Total **			288

HD_HARDW.dbf (Hardware)

Field	Field Name	Type	Width
1	HDWR_ID	Numeric	8
2	EMP_ID	Numeric	8
3	CFG_ID	Numeric	8
4	CFG_NAME	Character	10
5	SHARED	Character	1
6	BRAND	Character	20
7	TYPE	Character	15
8	MODEL	Character	20
9	SERIAL_NO	Character	20
10	VALUE	Numeric	8.2
11	WARRANTY	Character	10
12	VEND_CODE	Character	6
13	PURCH_DATE	Date	8
14	DESCRIP	Character	40
15	ACCOUNT_NO	Character	10
16	DEPR_VALUE	Numeric	8.2
17	DEPRECIATE	Character	1
18	WARR_EXP	Date	8
19	SVC_CODE	Character	6
20	SVC_EXP	Date	8
21	ASSET_TAG	Character	12
22	PO_NUMBER	Character	12
** Total **			248

HD_HELP.dbf (Help index)

Field	Field Name	Type	Width
1	HELP_FIELD	Character	30
2	KEYWORD	Character	50
** Total **			81

HD_HSCFG.dbf (Configurations)

Field	Field Name	Type	Width
1	EMP_ID	Numeric	8
2	CFG_ID	Numeric	8
3	CFG_NAME	Character	10
4	CFG_DESC	Character	30
5	NETCEN_ID	Character	8
** Total **			65

HD_HTABL.dbf (Hardware Table)

Field	Field Name	Type	Width
1	BRAND	Character	20
2	TYPE	Character	15
3	MODEL	Character	20
4	DESCRIP	Character	40
5	VALUE	Numeric	8.2
6	WARRANTY	Character	10
** Total **			114

HD_PHONE.dbf (Communications / Phone numbers)

Field	Field Name	Type	Width
1	PHONE_ID	Numeric	8
2	EMP_ID	Numeric	8
3	TYPE	Character	2
4	DESCRIP	Character	15
5	NUMBER	Character	26
6	PAGER_TYPE	Character	1
7	PREFIX	Character	20
8	SUFFIX	Character	20
9	BAUD_RATE	Character	5
** Total **			106

HD_REFER.dbf (Referrals)

Field	Field Name	Type	Width
1	REFER_ID	Numeric	8
2	CALL_ID	Numeric	8
3	REFER_BY	Character	12
4	REFER_DATE	Date	8
5	REFER_TIME	Character	6
6	REFER_TO	Character	30
7	COMMENTS	Character	50
8	ACCEPTED	Character	1
** Total **			124

HD_REMIN.dbf (Ticklers)

Field	Field Name	Type	Width
1	TICKLE_ID	Numeric	8
2	TECH_NAME	Character	12
3	EVENT_DATE	Date	8
4	EVENT_TIME	Character	6
5	EVENT_DESC	Character	50
6	REC_TYPE	Character	1
7	DATE_ADDED	Date	8
8	TIME_ADDED	Character	6
9	TECH_FROM	Character	12
10	REALTIME	Character	5
** Total **			117

HD_STABL.dbf (Software table)

Field	Field Name	Type	Width
1	BRAND	Character	20
2	TYPE	Character	15
3	MODEL	Character	20
4	VALUE	Numeric	8.2
5	WARRANTY	Character	10
6	VERSION	Character	20
7	DESCRIP	Character	40
** Total **			134

HD_SOFTW.dbf (Software)

Field	Field Name	Type	Width
1	SFTWR_ID	Numeric	8
2	EMP_ID	Numeric	8
3	CFG_ID	Numeric	8
4	CFG_NAME	Character	10
5	SHARED	Character	1
6	BRAND	Character	20
7	TYPE	Character	15
8	MODEL	Character	20
9	VERSION	Character	20
10	SERIAL_NO	Character	25
11	VALUE	Numeric	8.2
12	WARRANTY	Character	10
13	VEND_CODE	Character	6
14	PURCH_DATE	Date	8
15	PO_NUMBER	Character	12
16	ACCOUNT_NO	Character	10
17	WARR_EXP	Date	8
18	DEPR_VALUE	Numeric	8.2
19	DEPRECIATE	Character	1
20	SVC_CODE	Character	6
21	SVC_EXP	Date	8
22	DESCRIP	Character	40
23	LIC_START	Date	8
24	LIC_END	Date	8
25	NUM_LICENS	Numeric	6
26	ASSET_TAG	Character	12
** Total **			295

HD_SURVA.dbf (Surveys)

Field	Field Name	Type	Width
1	SURV_ID	Numeric	8
2	CALL_ID	Numeric	8
3	SURV_DATE	Date	8
4	SURV_NOTES	Memo	10
5	RATING	Character	6
6	CLIENT	Character	25
7	LOGGED_BY	Character	12
** Total **			78

HD_TABLE.dbf (Tables for drop-down fields)

Field	Field Name	Type	Width
1	TABLE_CODE	Character	4
2	CODE	Character	6
3	DESCRIP	Character	30
4	SECONDARY	Character	6
** Total **			47

HD_VEND.dbf (Vendors / Service companies)

Field	Field Name	Type	Width
1	VENDOR_ID	Numeric	8
2	VEND_CODE	Character	6
3	COMPANY	Character	40
4	ADDR1	Character	40
5	ADDR2	Character	40
6	ADDR3	Character	40
7	PHONE	Character	20
8	CONTACT	Character	30
9	ACCT_NO	Character	20
10	PRODUCTS	Character	50
11	COMMENTS	Character	50
12	REC_TYPE	Character	1
** Total **			346

Database Field Descriptions

This section provides detailed descriptions of the major fields in the HELP!Desk tables. The listings include the default screen label, the actual field name in the database, and a description. Fields that are table-driven (with a drop-down pick list) are indicated by **–** .

Client File (HD_CLIEN.DBF) *Also referred to as Caller.*

(emp_id)
This field is used internally to link clients to calls and inventory records. Each client record is assigned a **unique** emp_id.

Name (last_name, first_name)
The client or contact name.

Client Type (rec_type)
The client type. Valid entries are **I** for Internal clients, **E** for External clients. **This field affects how information is reported and displayed. It must be filled in with an "I" or "E".**

Title (title)
Job Title.

Emp # (emp_no)
Employee number. This is an informational field and is not used for searches.

Company (company)
Company or organization name.

Acct # (account_no) **–**
Client's account number. This field can be used to sort and filter reports so it is important to set account numbers.

Search Key (asset_tag)
This field can be used to retrieve client information (using the **Find** command). The field label should be changed to reflect the information you store within it. *The value contained in this field will be used as a default Asset Tag in the client's hardware inventory.*

Loc Code (loc_code) **–**
The Location Code is used to identify the source of information.

Priority (priority) **–**
The value of this field is used as a default Priority for all calls entered for this client.

Contract (contract) **–**
Type of support contract this client maintains.

Contr. Exp (cont_exp**,** contexp_hr, expire_by)
Expiration date or remaining hours of the client's support contract. Both the contract type and expiration are displayed on the Client Profile screen. If the contract has expired, the word **Expired** is shown in a highlighted color.

Invc Code (invc_type) **–**
Type of invoice this client receives.

Min Charge (min_charge)
This is the minimum charge that will be assigned to any call logged for this client.

Address (addr1, addr2)
Mailing address (2 lines).

City (city)
City.

State (state)
State or Province.

Zip Code (zip)
Zip or postal code.

Dept (department) **–**
Department.

Group (group) **–**
Group.

Bldg (building) **–**
Building.

Zone (zone)
Zone.

Floor (floor)
Floor.

Office (office)
Office number.

Phone (phone)
Office phone. **The phone number can be used to *Find* a client.**

Ext (extension)
Office extension. **The extension field can be used to *Find* a client.**

Comments (notes)
This text area holds up to 64,000 characters of text and can be used for any notes or comments regarding the client.

Calls File (HD_CALLS.DBF)

(emp_id)
This field is used internally to link the call back to the appropriate client.

Work Order/Call Number (call_id)
Each call is assigned a unique number for tracking purposes. The value can not be modified.

(helper)
Used internally to keep track of the person who initially logged the call.

Time of Call (call_date, call_time)
The date and time the call was made. Both fields are pre-filled with current information when a new call is added, but can be edited.

Category (call_type) **–**
The call category. An unlimited number of categories can be defined, but we recommend limiting the number to eight or less.

Subject (subject) **–**
The basic subject of the call. We recommend defining subjects so that each subject can apply to multiple products.

Product (product) **–**
The product being referenced by the call. By being specific with the product, you can ultimately generate reports that can help determine company standards and develop needed training courses.

Technician (assignee) **–**
The technician responsible for the call. It will default to the current HELP!Desk user (the log-in name).

Priority (priority) **–**
The priority of the call or problem. The default is taken from the client's information. "1" is the highest priority.

Last Update (lupdate)
This field is maintained automatically by HELP!Desk. It is the date on which the information in the call was last modified.

Problem (problem)
The description of the problem. This is a free-flowing text field that holds up to 64,000 characters.

Resolution (resolution)
The resolution of the problem. This is a description of how the problem was handled. You should provide details of how the problem was resolved and make suggestions on how to prevent the problem from recurring. Resolutions can be reviewed by management and other technicians. This is also a free-flowing text field that holds up to 64,000 characters.

Res. Code (res_code) **–**
A code for the problem resolution. This field enables statistical reporting on calls based on the steps needed to resolve the problem. Resolution Codes should be developed and clearly understood by technicians and management.

Status (follow_up) **–**
The status of the call. Status codes are user-definable. Some suggested values are shown in the table below.

Code	Description
C	Call is closed (problem has been resolved).
F	A follow-up call is required.
R	Return the client's call at a later time.
S	A service call must be made to resolve this call.
W	Waiting for information from the client.

When (f_date, f_time)
Enter the **date** and **time** that is appropriate for the **Status** you entered above (i.e. close date & time for a closed call, follow-up date & time for a follow-up, etc.). For a **closed** call, the fields will automatically be filled with the current date and time. For a **follow-up**, the date is filled with tomorrow's date. All defaults can be overridden.

Duration (duration)
The length of time (in minutes) spent working on the call. HELP!Desk accumulates time whenever the *Call Window* is open, but any additional time you spend must be entered manually. This field accepts entry in days, hours and minutes, and converts the result to minutes.

Charge (charge)
The charge for this call. This field can be computed automatically based on duration and the hourly rate. You can also enter charges directly.

Add'l Time (add_time)
This field works like Duration but is not timed automatically. A possible use of this field would be to track the time billed to you by a third-party service provider.

Add'l Chrg (add_charge)
This field can be used to track any additional charges incurred in the resolution of the call. It can be used to bill for parts, phone charges, travel expenses, third-party service charges, etc.

RMA Number (rma_number)
This field can be used to log an RMA (Return Materials Authorization) number or any other identifying code. Calls can be retrieved by RMA Number.

Add Call to Solutions database when closed? (addto_tech)
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 include a call in the **Solutions** file, enter **Y** in this field.

Hardware File (HD_HARDW.DBF)

(emp_id)
Used internally to link each hardware record to a specific client.

Type (type) **–** *The hardware table is accessed by clicking the “Browse” button.*
General category, such as "Printer", "Monitor" or "Telephone".

Brand (brand)
Manufacturer or brand name.

Model (model)
Model name or number.

Description (descrip)
Description of item.

Serial # (serial_no)
Serial number.

Asset Tag (asset_tag)
Asset tag. Note this field defaults the value found in the client's **Search Key** field. This field can be used to retrieve a client profile.

Shared? (shared)
This field is used to handle items that are used by more than one person. Accepted values are:

N	Not Shared. This means the item is used only by this client.
P	Shared - Primary User. The item is used by more than one person, but it will be counted as *owned by this client* on inventory reports. **Only one client should be marked as the Primary User of a given piece of equipment.**
S	Shared - Secondary User. The client uses this equipment, but is not the Primary User. **An unlimited number of clients can share a piece of equipment. All but one should be marked as Secondary Users.**

Purch Date (purch_date)
The purchase date of the equipment.

PO Number (po_number)
The number of the Purchase Order used to obtain the item.

Price (value)
The purchase price of the item.

Vendor (vend_code) **–**
Vendor from which the item was purchased. A list of vendors is maintained in the Vendors table.

Warranty (warranty)
Warranty. Can be entered in days, months or years with the time unit abbreviated as **D**, **M** or **Y**, respectively. Examples: 90D, 6M or 3Y.

Warranty Exp (warr_exp)
Warranty expiration date. This data will be filled in automatically if the **Purchase Date** and **Warranty** fields are filled in.

Service Code (svc_code) **–**
Company providing service for this item. A list of providers is maintained in the Service Companies table.

Svc Expires (svc_exp)
Date service contract expires.

Depreciate (depreciate)
Enter **Y** if this item is depreciated.

Curr. Value (depr_value)
Current value of the item.

Software File (HD_SOFTW.DBF)

(emp_id)
Used internally to link each software record to a specific client.

Type (type) **–** *The software table is accessed by clicking the "Browse" button.*
General category, such as "Spreadsheet", "Anti-Virus" or "Database".

Manufacturer (brand)
Manufacturer or brand name.

Product Name (model)
Model name or number.

Description (descrip)
Description of item.

Serial # (serial_no)
Serial number.

Version (version)
The version number of the software.

Shared? (shared)
This field is used to handle items that are used by more than one person. Accepted values are:

- N Not Shared. This means the item is used only by this client.
- P Shared - Primary User. The item is used by more than one person, but it will be counted as *owned by this client* on inventory reports. **Only one client should be marked as the Primary User of a given piece of equipment.**
- S Shared - Secondary User. The client uses this equipment, but is not the Primary User. **An unlimited number of clients can share a piece of equipment. All but one should be marked as Secondary Users.**

Purch Date (purch_date)
The purchase date of the equipment.

PO Number (po_number)
The number of the Purchase Order used to obtain the item.

Price (value)
The purchase price of the item.

Vendor (vend_code) **–**
Vendor from which the item was purchased. A list of vendors is maintained in the Vendors table.

Warranty (warranty)
Warranty. Can be entered in days, months or years with the time unit abbreviated as **D**, **M** or **Y**, respectively. Examples: 90D, 6M or 3Y.

Warranty Exp (warr_exp)
Warranty expiration date. This data will be filled in automatically if the **Purchase Date** and **Warranty** fields are filled in.

Service Code (svc_code) **–**
Company providing service for this item. A list of providers is maintained in the Service Companies table.
Svc Expires (svc_exp)
Date service contract expires.

Depreciate (depreciate)
Enter **Y** if this item is depreciated.

Curr. Value (depr_value)
Current value of the item.

For Additional Information...

Refer to the HELP!Desk User Manual for information on day-to-day operations of the software.

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.

Coastal Technologies
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 and public seminars led by technology experts. Visit www.newinstruction.com.

Testing & Quality Assurance	Operating Systems Administration
Programming Languages	Emerging Telecom Technologies
Networking Concepts	Mainframe