Evaluator’s Guide

PC-Duo Enterprise HelpDesk v1.2

Getting Started

Logging On

To log on to Enterprise HelpDesk, you need a user account, which consists of a user name (sometimes called a logon name) and an optional password. Enterprise HelpDesk includes several default user accounts that you can use to log on:

admin Has full administrative privileges. Password = admin.

demo Has full administrative privileges. No password.

guest Has limited privileges.

analyst, group leader, employee Role-based accounts with different user permissions. Used to demonstrate the workflow features of Enterprise HelpDesk. No passwords.

To log on:

1. Start your Web browser and go to the Web view logon page (typically **http://server/helpdesk**, where **server** is the computer name of your Web server).
2. In the **Logon Name** box, type your user name.
3. In the **Password** box, type your password.
4. Click **Logon**.

   After you log on, you will see a list of the Web views that you have permission to open. Access to Web views is controlled by user permissions.
5. Click a Project / View to open the Web view.

What's a Web View?

Enterprise HelpDesk provides Web-based views of Enterprise HelpDesk projects.

With Web views, you can provide separate views for employees and for help desk staff. Each view is accessed through the same Web-based interface. The main difference between views is the set of queries and fields available in the view.

- Queries determine what issues users can retrieve from the project database.

  For example, employees who are not part of the help desk don't need to see all the issues in the project database, just the issues submitted by them.
- Fields determine what information users can view and modify for each issue.

  For example, employees don't need to see the fields used by help desk staff for tracking and resolving issues.

About the Default Views

HelpDesk Shows all issues and issue information, and is intended for use by help desk staff. Enforces workflow rules and defines an issue lifecycle.

Employee Shows only the issues and information submitted to the help desk by the employee. Internal notes and information added by help desk staff is hidden. Allows employees to submit new issues and check the status of existing issues.

Visual Tour of a Web View

A. The buttons in the view toolbar allow you to exit the Web view, get help, and set options. Depending on your user permissions, there may also be buttons for generating reports, reviewing the revision history of the current record, adding contacts, and changing your password.

B. Run predefined queries, sort the **Summary List** (see callout **D**), and change the layout (columns) of the **Summary List**.

C. The ad-hoc query editor allow you to search against specific fields. For example, you search for keywords in text fields, or for date ranges.

D. The **Summary List** displays all the issues found by the current query. To load an issue, click its issue number.

E. This tabbed form displays the details of an issue. Required fields are highlighted in dark red.

F. Shows the ID of the issue currently loaded into the form. To load an issue from the **Summary List**, type the number and press Enter.

G. Create a new issue, save or cancel changes to the current issue, and print (or export to Word, Excel, or PDF) the current issue.

H. Indicates current status of the form (for example: editing, ready to create new, or loading data).

Click to refresh the Summary List.
Click to show more of the Summary List.
Click to page through the Summary List.

Exiting a Web View

Web views are applications, not simple Web pages. Exiting by closing the browser window can leave database connections open and will not free your license. The connection will eventually time out, but until then, you (and other users) may not be able to log on.

To exit:

In the Web view toolbar (the buttons displayed at the top of the page), click **Exit**.

Issue Tracking: Roles and Workflow

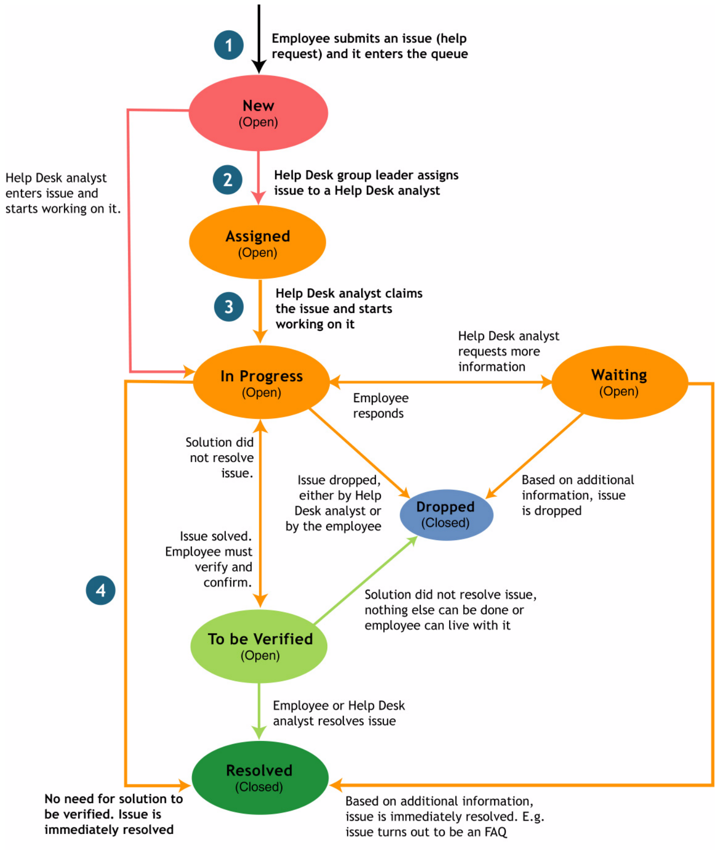
This section walks you through the workflow of recording, tracking, and resolving an issue.

By logging on as a different user (employee, help desk analyst, or help desk group leader) at each step of the process, you'll learn about the different role each user plays in a help desk workflow. You'll also see how different views are customized for different users, and how workflow rules are enforced.

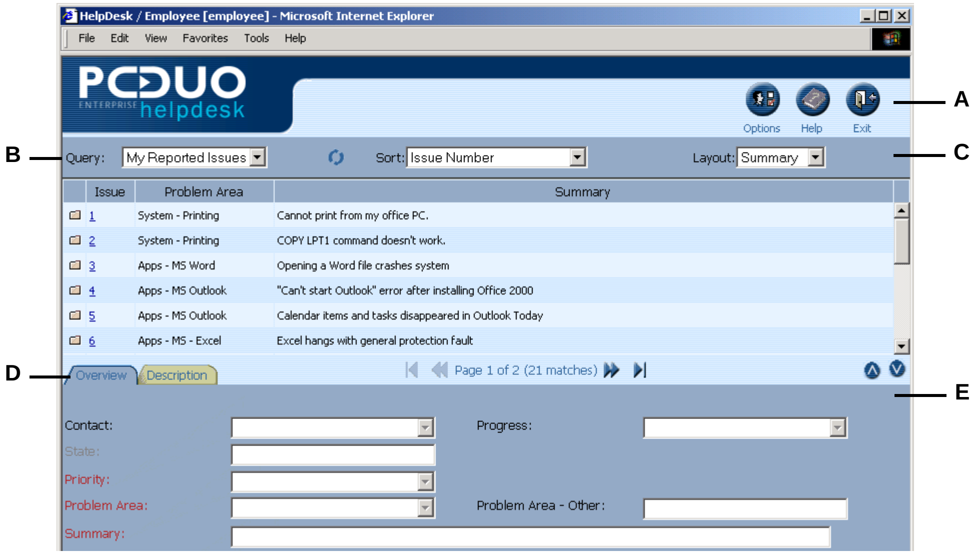
The diagram below shows the complete default workflow. In this walkthrough, we'll take a basic, four step path:
New > Assigned > In Progress > Resolved.

You can customize the default workflow using the workflow editor in HelpDesk Web Admin.

Help desk roles in a basic, four-step workflow



Employee View The Employee view is designed for reporting problems.



A. There are no **Reports**, **History**, or **Contact** buttons in the toolbar. Employees don't need these features to report problems.

B. The **Query** list includes only one query: My Reported Issues. Employees can see only the problems they reported.

C. No ad-hoc query editor.

D. There are only two tabs, because employees don't need to fill in the **Resolution** or **Detail** information, and they don't need to see the **Contact** information.

E. There's no **Owner** field on the **Overview** tab, because employees don't assign issues.

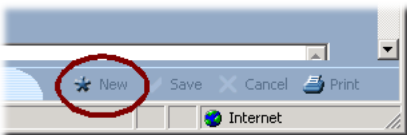
Step 1: Employee Reports a Problem

Log on to the Employee view

1. Log on to Enterprise HelpDesk as **employee**. Open the **HelpDesk / Employee** Web view.
2. Take a minute to look over the Web view. You should notice a few differences from the view we looked at in the Introduction section.

Report a problem

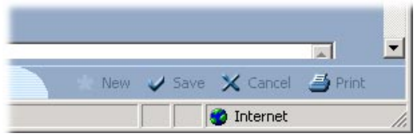
1. Click **New** to open a new issue.



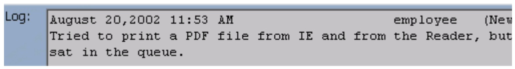
2. Enter some information about the problem you want to report. For example, suppose you can't get a PDF file to print.
   a. In the **Priority** list, click **ASAP**.
   b. In the **Problem Area** list, click **System - Printing**.
   c. In the **Summary** box, type “Can’t print a PDF file”.
   d. Click the **Description** tab, and then in the **Description** box, type a more detailed description of the problem:

      “Tried to print a PDF file from IE and from the Reader, but the job just sat in the queue.”
3. Click the **Progress** list. Note that it contains only one choice: **New**.

   Employees are not allowed to change the Progress from **New** to any other value. This is part of the default workflow, which controls how an issue progresses through the help desk process.
4. Click **Save**, and click **OK** when you are asked if want to save your changes.



   When you save the issue, the text you typed in the **Description** box is automatically stamped with time and date information and moved to the **Description Log** box.



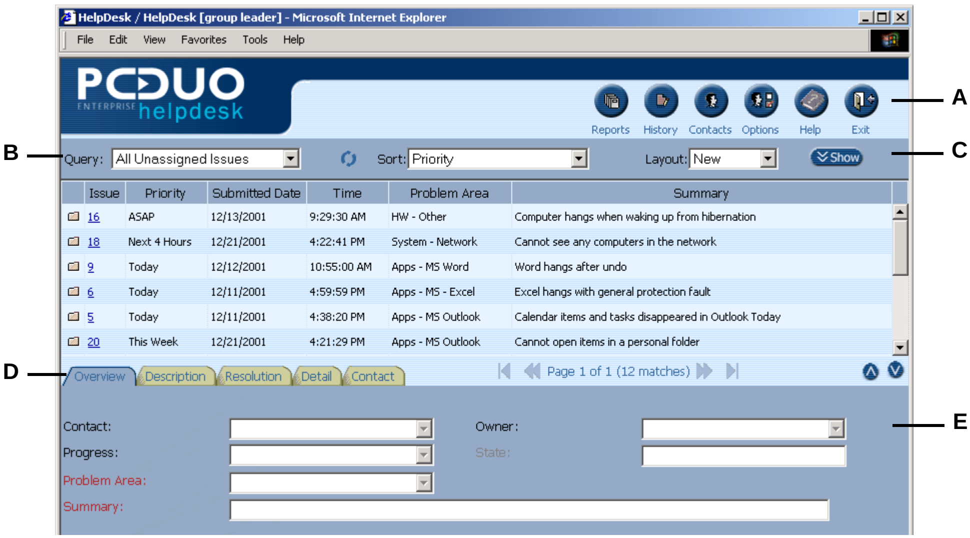
5. Click **Exit** to exit the Employee view.

Step 2: Group Leader Assigns the Issue

Log on to the HelpDesk view

1. Log on to Enterprise HelpDesk as **group leader**. Open the **HelpDesk / HelpDesk** Web view.
2. Take a minute to look over the Web view. You should notice a few differences between this view and the Employee view.

HelpDesk View The HelpDesk view is a detailed view designed for use by help desk staff.



A. The **Reports**, **History**, and **Contact** buttons are available.

B. The **Query** list includes a variety of queries.

C. The ad-hoc query editor is available (by clicking **Show**).

D. The **Resolution**, **Detail**, and **Contact** tabs

E. The **Owner** field is present on the **Overview** tab.

Check for new issues

After you log on, you need to select the appropriate query, sort, and layout so the **Summary List** shows you the information you need (in this case, information about new, unassigned issues).

Each time you log on, Enterprise HelpDesk restores the same query, sort, and layout you used the last time. So in practice, you don't always have to select a query, sort, and layout.

---

1 In the **Query** list, click **All Unassigned Issues** to list all issues where Owner = <None>.

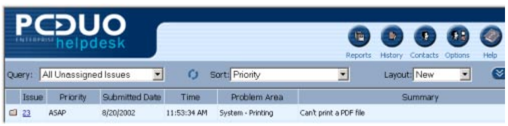
You could also use the **All New Issues** query to list all issues with Progress = New.

2 In the **Sort** list, click **Priority** to list the new issues in ascending order by priority.

3 In the **Layout** list, click **New**.

The **New** layout displays relevant information for new, unassigned issues. In contrast, the **Assigned** layout (which is the default layout) displays information (such as the assigned date and owner) that is relevant only for issues that are actually assigned to somebody.

You should now see the "Can't print a PDF file." issue at the top of the **Summary List**..



4 In the **Summary List**, click the issue number of the "Can't print a PDF file." issue.

The issue details are loaded into the form at the bottom of the window.

5 Review the problem description (in the **Description Log** field).

Search for resolved issues related to printing

Before assigning the issue to an analyst, you can check for similar problems that were resolved. It may be that this printing problem occurs frequently and there is a well-known solution.

1 Click **Show** to show the ad-hoc query editor.

2 In the **Field** list, click **Resolution**.

The **Resolution** field contains a description of how a problem was resolved.

3 In the **Test** list, click **Contains**.

4 In the **Value** list, type "print" (without the quotation marks).

5 Press **Enter** or click to start the search.

6 If you don't see what you want in the search results, you can try expanding the search. In the **Retain Query** list, click **Or**.

Or combines the previous query (Resolution contains "print") with a second ad-hoc query.

7 Create an ad-hoc query that searches for issues where the **Resolution** field contains the string "PDF":

8 Press **Enter** to start the search, or click .

The **Summary List** will list all issues that match this query:

```
(Resolution Contains "print")
OR
(Resolution Contains "PDF")
```

Queries are case-insensitive, so you can search for either “pdf” or “PDF”.

Assign the issue to an analyst

You assign an issue by selecting an analyst’s name in the **Owner** field. After you set the owner, you mark the issue **Assigned** in the **Progress** field.

1. Return to the list of unassigned issues by running the **All Unassigned Issues** query.
2. Find the “Can’t print a PDF file” issue and load it into the form.
3. In the **Owner** list, click **Help Desk Analyst**.
4. In the **Progress** list, click **Assigned**.

   Note that the **Progress** list contains only **New**, **In Progress**, and **Assigned**. A group leader can change the **Progress** from **New** to **In Progress** or **Assigned**, but not to any other value (for example, **Resolved**). This is part of the default workflow.
5. Click **Save**.

   Note that now the **Progress** list contains only one choice: **Assigned**. Only a help desk analyst (or an administrator) can move an issue from the **Assigned** state.

Exit the view

Click **Exit** to exit the HelpDesk view.

Step 3: Analyst Works on the Problem

While an issue is marked **Assigned**, it is waiting to be claimed by a help desk analyst. An analyst claims an issue by marking it **In Progress**, which indicates that the analyst is working on the problem.

Log on and check for new issues assigned to you

1. Log on to Enterprise HelpDesk as **analyst**. Open the **HelpDesk / HelpDesk** Web view.
2. In the **Query** list, click **My Assigned Issues** to list the issues assigned to you that are marked **Assigned**.
3. In the **Sort** list, click **Priority** to list the new issues in ascending order by priority.

   You should now see the “Can’t print a PDF file.” issue at the top of the **Summary List**.
4. In the **Layout** list, click **New**.

Start work on the issue

1. In the **Summary List**, click the issue number of the “Can’t print a PDF file.” issue.

   The issue details are loaded into the form at the bottom of the window.
2. In the **Progress** list, click **In Progress**.

   Note that the **Progress** list contains only **Assigned** and **In Progress**. In the default workflow, an **Assigned** issue cannot move directly to **Resolved** without first being marked **In Progress**.
3. Click **Save** to save the issue.

Step 4: Analyst Fixes the Problem

Suppose all it took to resolve this “Can’t print a PDF file” issue was to walk over and reset the printer. Now that the problem is fixed, you have to mark the issue as Resolved.

Resolve the issue

1 If you exited Enterprise HelpDesk, log on again as **analyst**. Open the **HelpDesk / HelpDesk** Web view.

2 In the **Summary List**, click the issue number of the “Can’t print a PDF file.” issue.

3 In the **Progress** list, click **Resolved**.

Note that you have a number of other choices at this point:

Dropped - The employee no longer has a problem.

Waiting - You are waiting for more information from the employee.

To be Verified - The employee is trying your proposed solution to the problem.

4 Click the **Resolution** tab, and in the **Time Spent (minutes)** box, type the number of minutes it took you walk to the printer, reset it, and walk back to your desk.

5 In the **Resolution** box, type “Reset printer”.

6 Click **Save** to save the issue.

More About Working with Issues

Finding and Listing Issues

You use the **Query**, **Sort**, and **Layout** lists to generate and format lists of issues in the **Summary List**.

A layout is the set of columns displayed in the Summary List.

The **Summary List** displays the results of a query as pages. For example, each page may contain 15 results (the actual number of results per page is set by your Enterprise HelpDesk administrator).

To browse the Summary List:

- Click to move back one page.
- Click to move forward one page.
- Click to go the first page.
- Click to go to the last page.

To change the size of the Summary List:

- Click and to increase and decrease the number of visible issues.

-or

- Click **Options** and change the height of the Summary List.

To print the Summary List:

- Click an issue in the **Summary List**. In the **File** menu of the browser, click **Print**.

To refresh the Summary List

- Click .

Building Ad-hoc Queries

You use the Ad-hoc Query Editor to build queries that test the value of a single field. Predefined queries find broad categories of issues, such as all open issues or all assigned issues. Often you need to find issues based on more specific criteria. For example, you may want to search the Summary, Description, Notes, or Resolution fields for keywords. Or you may want to search for all issues submitted during a specific timespan.

To define an ad-hoc query:

1. Click Show.

   Access to the Ad-hoc Query Editor is controlled by user permissions.

2. In the **Field** list, click the issue field you want to search against.
3. In the **Test** list, click a query operator.
4. In the **Value** field, enter the value you want to search against.

If you type a search string in the Value box, press Enter to start the search. When you choose a value from the Value list, the search starts automatically. But when you type the search string directly in the Value box, you must press Enter.

When you change the Test in an ad-hoc query, you must click to run the new ad-hoc query.

Text searches are case insensitive.

Combining Ad-hoc Queries

The **Retain Query** list allows you to combines an ad-hoc query with the previous query (which can be a predefined query from the **Query** list or another ad-hoc query). Use **And** to narrow the search and restrict the list of issues. Use **Or** to broaden the search and expand the list. Use **No** when you want to search the entire database of issues.

For example, **And** allows you to search the **Summary List**..

To search the issues in the Summary List:

1. In the **Query** list, click a query.
2. Click **Show** to show the **Ad-hoc Query Editor**.
3. In the **Retain Query** list, click **And**. This combines the ad-hoc query with the current predefined query.
4. Run an ad-hoc query.

Searching for Dates

To search against dates, use the same date format as used by Enterprise HelpDesk to display dates such as **Submitted Date**. For example, to find all issues submitted in March 2002, use this ad-hoc query:

```
Submitted Date >= 3/1/2002
```

Using the Contains, Like, and Not Like Operators

Contains matches any part of a field, while **Like** and **Not Like** match the entire contents of a field. For example, the query

```
Summary Contains "keyword"
```

matches any issue that contains the string “keyword” anywhere in the **Summary** field.

The query

```
Summary Like "Cannot print."
```

finds issues where the **Summary** field is exactly equal to “Cannot print.” Becaue **Like** applies to the entire field, it is typically used with wildcards. For example, the query

```
Summary Like "Word hangs%"
```

finds all issues where the Summary starts with the string “Word hangs”.

Not Like is also useful when combined with wildcards. For example, the query

```
Problem Area Not Like "System%"
```

finds all issues that are not system problems. Note that this example shows that you can use **Contains**, **Like**, and **Not Like** to search choice lists as well as text fields.

Searching with Wildcards

The **Like**, **Not Like**, and **Contains** operators support wildcard characters, which gives you considerable flexibility in the specification of search patterns. Using wildcards, you can search for inexact patterns of text in any field.

Wildcard	Matches
_	Any single character.
%	Zero or more characters. For example: "*fr%ze*" matches "freeze" or "froze"

Wildcard	Matches
[charlist]	Any single character in charlist. Can include spaces, but not the right bracket (]) character. For example: "[34]86" matches "386" or "486"
	Use a hyphen to specify a range of characters. For example: "[1-36-9]" matches the digits 1, 2, 3, 6, 7, 8, or 9
	To match the hyphen character, the hyphen must be either the first or last character in charlist. For example: "[-0-9]" or "[0-9-]" match any digit or a minus sign
[^charlist]	Any single character not in charlist. For example: "[^tb]rash" matches "crash" but not "trash" or "brash"

Viewing Issues

The **Summary List** displays a summary of each issue. To view the full details of an issue, you select it from the list.

To view issue details:

- In the **Summary List**, click the issue number or the folder icon.
  - or-
  Type an issue number in the **Current Issue** box and press **Enter**.

Submitting Issues

To submit a new issue:

1. Click **New** to open a new issue.
2. Enter all available information about the issue.
3. Click **Save** to save the new issue.

If you do not fill in all the required fields, Enterprise HelpDesk prompts you to fill in the missing information.

If you decide not to submit an issue, click **Cancel** to discard the issue.

Attaching Files to Issues

If you have notes, pictures, and other files that document an issue, you can attach them to the issue.

To attach an ASCII or binary file:

1. Beside the **Attachments** field, click .
2. In the **Attachments** dialog, click **Browse** and locate the file you want to attach.
3. Click **Upload File** to copy the file to the server. Click **Link File** to add a link to the file on your local computer.

Viewing an Issue's Revision History

Enterprise HelpDesk maintains a revision history for each issue. The revision kistory is a list of all changes made to the issue after it was first submitted. Each time you save an issue, Enterprise HelpDesk records the changes you made in the revision history.

To open the Revision History for an issue:

1. In the **Summary List**, click an issue number, or type an issue number in the **Current Issue** box and press **Enter**.
2. In the Web view toolbar, click **History**.

The revision number (Revision column in the Revision History column) increases by one each time the issue is saved. The first revision, which is not shown, is the initial submission of the issue.

Updating Issues

A typical issue is constantly updated during its lifetime, as employees and help desk staff track and follow up on the issue. Depending on your role in the company, you may update an issue by changing its status, assigning it to a help desk analyst, adding notes, or adding resolution information when the issue is closed.

To update an issue:

1. In the **Summary List**, click an issue number, or type an issue number in the **Current Issue** box and press **Enter**.
2. Edit the issue information.
3. Click **Save** to save your changes, or **Cancel** to discard your changes.

Printing Issues

To print an issue:

1. In the **Summary List**, click an issue number, or type an issue number in the **Current Issue** box and press **Enter**.
2. Click **Print**.
3. Click  to print the issue.

To print the Summary List

1. Click any of the issues in the **Summary List**.
2. In the **File** menu of the browser, click **Print**.

Exporting Issues

To export an issue:

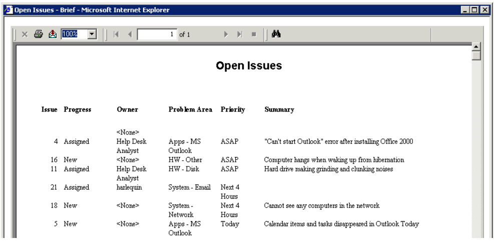
1. In the **Summary List**, click an issue number, or type an issue number in the **Current Issue** box and press **Enter**.
2. Click the **Print** button.
3. Click  to save the issue as either Crystal Reports (*.rpt), Microsoft Word (*.doc), Microsoft Excel (*.xls), Rich Text Format (*.rtf), or Adobe Acrobat (*.pdf).

Reporting

Enterprise HelpDesk provides Web-based reporting to help you manage your help desk.

Listing reports extract and present subsets of the information entered in the issues.

Sample Listing Report


Open Issues - Brief - Microsoft Internet Explorer

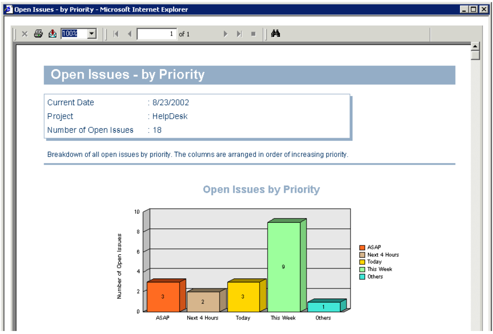
100% 1 of 1

Open Issues

Issue	Progress	Owner	Problem Area	Priority	Summary
		<None>			
4	Assigned	Help Desk Analyst	Apps - MS Outlook	ASAP	"Can't start Outlook" error after installing Office 2000
16	New	<None>	HW - Other	ASAP	Computer hangs when waking up from hibernation
11	Assigned	Help Desk Analyst	HW - Disk	ASAP	Hard drive making grinding and clunking noises
21	Assigned	harlequin	System - Email	Next 4 Hours	
18	New	<None>	System - Network	Next 4 Hours	Cannot see any computers in the network
5	New	<None>	Apps - MS Outlook	Today	Calendar items and tasks disappeared in Outlook Today

Custom reports are customized listing reports that present data in graphic formats such as pie charts and bar charts. Custom reports are built with Crystal Reports, so you can add features such as charts, formulas, field highlighting, and running totals to a listing report. You can also import graphics (such as company logos) and completely reformat a listing report.

Sample Custom Report



To view and print reports:

1. Click the **Reports** button.
2. Click the **Listing** tab or the **Custom** tab.
3. Click the report you want to view, and then click the **View** button.
4. Click to print the report. Click to save the report as PDF, Word, or Excel.

To view or print landscape reports:

1. Internet Explorer only: in the **Report Viewer**, click **Show**.
2. In the **Layout** list, click **Landscape**.

To change the report viewer:

You can use either ActiveX or a Java applet to view reports. The ActiveX report viewer works only on Internet Explorer. By default, Enterprise HelpDesk detects your browser type and sets the viewer type for you.

1. Internet Explorer only: in the **Report Viewer**, click **Show**.
2. In the **Viewer Type** list, click the viewer you want to use.

Contacts, Passwords, and Options

Adding and Editing Contacts

A contact is a person who does not have

a Enterprise HelpDesk user account, but who reports issues. For example, issues can be reported by guests or contractors who are not Enterprise HelpDesk users.

When you submit an issue, you select a contact from the **Contact** list. By default, the **Contact** list includes the name of all Enterprise HelpDesk users. To add other names to this list, you use the **Contact** command.

To add a contact:

1 In the Web view toolbar, click **Contacts**.

2 Click **Add** and then click **Contact**.

3 Enter the contact information and click **Apply**.

To edit a contact:

1 In the Web view toolbar, click **Contacts**.

2 In the list of contacts, click a contact and then click **Edit**.

3 Edit the user information and then click **Apply**. Click **Cancel** to cancel the changes.

Disabling a contact has no effect.

Changing your Password

To change your password:

1 In the Web view toolbar, click **Password**.

2 In the **Old Password** box, type your current password.

3 In the **Password** box, type your new password.

4 In the **Confirm Password** box, type your new password again.

5 Click **Ok**. Click **Clear** to clear all text boxes, or click **Cancel** to exit without changing your password.

If you forget your password, ask your Enterprise HelpDesk administrator to reset your password.

Setting Options

To set the heights of the Summary List and the details form:

1 In the Web view toolbar, click **Options**.

2 Enter a percentage value for either the **Summary List** or the **Details** (the form that displays the issue fields). The other value is automatically calculated.

The percentages indicate the amount of vertical space used by the **Summary List** and the issue.

The percentages add up to 100% and divide the available vertical space between the list and the form (a certain amount of vertical space is reserved for the other elements of the Web view).