



Lotus Domino® Application



GeoCom® Helpdesk

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Update 5.6 Build 184g

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1 Introduction

This documentation describes the upgrade and modifications of GeoCom® Helpdesk 5.6 Build 184.

With the update GeoCom Helpdesk 5.6 Build 184 some improvements were made which are explained in the following.

2 New licence key required

Upon updating GeoCom Helpdesk to Build 184 usage of a new licence key is required.

3 Notes client

With the update GeoCom Helpdesk 5.6 Build 184 the application fully supports Lotus Notes 6.

Usability of the application under Lotus Notes 5 is not affected by the update.

4 Access rights

There are now two new roles within the access control list, *[ReadCalls]* and *[ReadSolutions]*.

Users disposing of the role *[ReadCalls]* can read all calls (their own as well as foreign calls), regardless of further access rights. Changes to any foreign calls, however, still require the appropriate access rights.

The role *[ReadSolutions]* grants users read access to all standard solutions in the same way.

5 Changes to the call form of Helpdesk staff members

The new update affects the call form of Helpdesk staff members in several ways.

5.1 Layout changes

New design for Call form:

- Field "Call type" was moved into the head
- Field info gives more space to type in
- Sections "Problem categories" and "Solution" which so far could be seen at once are now shown alternatively
- A new section "Standard solution" can be used for a request by one-click-processing

Illustration: New layout of call form

5.2 Functional changes

Once a call is assigned the status "closed", all tickler entries for this call are deleted from the document.

The fields "Problem" and "Details" in calls, which have been sent as e-mails or have been entered manually by normal users using the standard call form, cannot be changed by Helpdesk staff members any more.

Users, who have entered their calls via standard call form, are able to change these fields via the same call form.

6 Workflow

Now, a workflow can be predefined within the configuration document. However, alternatively it can be predetermined as an ad-hoc-workflow by an authorised member.

Workflow means in this context the processing of a request by members in a predefined order, which can only be interrupted by users disposing of the role [Supervisor].

Normally, Helpdesk staff members hold author access rights to the Helpdesk database. Users with higher access rights, e.g. editor or manager rights, always have the possibility to interrupt a workflow, regardless of the role of [Supervisor].

6.1 Ad-hoc-workflow definition

With the role [CreateWorkflow] an enhanced dialog-box is available to the Helpdesk member to change the status of a call.

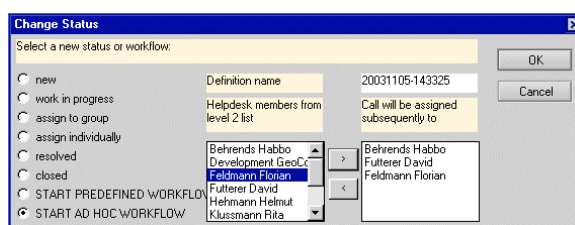


Illustration: Dialog-box to change status

The definition of a workflow consists of a name index that determines the order of processing.

If a call is located within the workflow, the following possibilities to change the status are at the member's disposal:

- Return to the former staff member or
- Transfer to the following staff member.

Reaching the last station permits to leave the workflow and to close a call.

6.2 Predefined workflow

Within the configuration document the section "Workflow" serves to set several definitions for workflows.

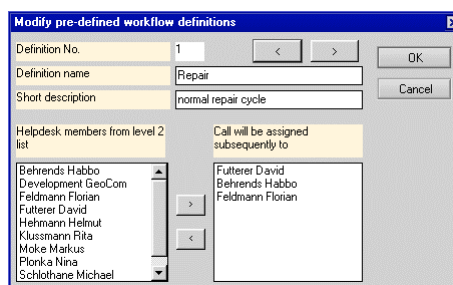


Illustration: Dialog-box to modify workflow definitions

After entering the definition of workflow within the configuration document they can be used by choosing the name in the enhanced dialog-box for changing the status.

To start a predefined workflow, the role *[CreateWorkflow]* is not necessary.

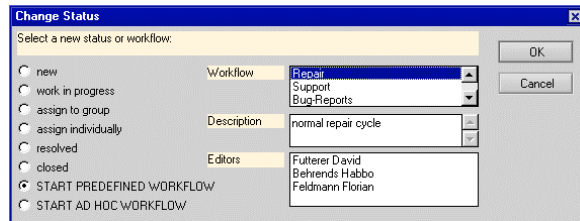


Illustration: Enhanced dialog box for starting predefined workflows

7 Import of private e-mails as Helpdesk calls

So far e-mails from your own mailbox could only be transferred to a Helpdesk call by cut and paste.

7.1 Import of a single e-mail in the call form

Now, there is the new action "Import message as helpdesk call".

The data source used for this purpose, generally one's own mailbox, will be identified by the active location document.

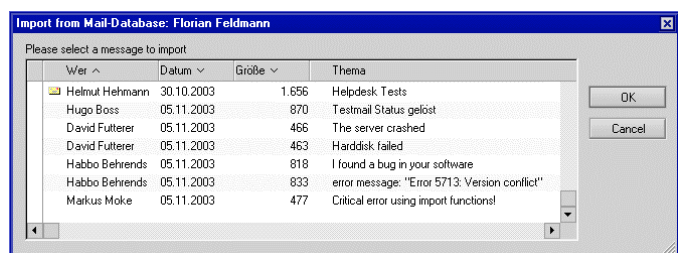


Illustration: Import of an e-mail as a call

Settings for the automatic post processing of additional information on reception of an e-mail will also be considered.

7.2 Import of several e-mails as Helpdesk-calls

Staff members with the role *[admin]* can import several messages at once. The fields, which have been entered into the call form so far, will be copied into the call documents which are to be created. Afterwards the call form (mask) is closed.

8 New settings of configuration

The basic improvements affect:

- Search in several database possible
- Fixed knowledge data base for new solutions
- Type of categorisation for views selectable by requester
- Personal settings are centrally administrable

8.1 Section "Connection of external Notes-data bases"

8.1.1 Selection of a knowledge data base dependent on language

The menu to adjust the knowledge data base dependent on the language German / English is now predetermined.

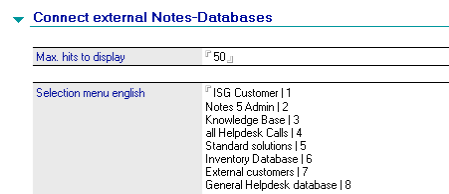


Illustration: Menu knowledge data base english

8.1.2 Search in several data bases

Beside the access to single data bases additional menu items can be enlisted for the search in several data bases.

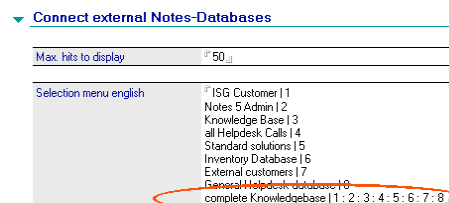


Illustration: Menu item for the search in several data bases

Searching in several data bases the number of single results and the knowledge data base are displayed.

Illustration: Result of a search request in several data bases

8.1.3 Additional notations to the definition of the usage of data from knowledge data bases

For the detailed definition of the field adoption some new tags and notations will be supported.

8.1.3.1 New tag <RTF> as postfix for denote target fields

If the target field of the call form is an RTF-field, the postfix <RTF> should indicate this. Data adoption within RTF fields basically results in attaching to the previous content.

The source fields, however, must not be specified by the postfix.

8.1.3.2 New 'xxx' notation for texts

Up to now all entries were taken as field names. They were searched in the source document and adapted to the content of the field. Only if there was no field of this name existing the plain text was entered.

If in advance a text should be declared as text (and NOT as field-name), the text can be set in quotation marks.

8.2 Knowledge data base for the import of new solutions adjustable

So far the chosen knowledge data base was used as the target data base for the creation of a new solution document.

Now the target data base can be predefined independent from the selection.

8.3 Categorisation in views by requester

Up to now the requests were automatically displayed under the name of the customer as well as under the name of the company. This is not useful especially in those cases, where the field "customer" is used for another purpose e.g. for user- ID of requester.

Now the way of classification can be selected in the section "views".



Illustration: Categorisation in views by requester

This setting only affects new documents. To convert existing requests the action "Supervisor -> selected documents: Update" can be used.

8.4 Central administration of personal configuration settings

Up to now solely noncommittal guidelines for the personal settings of new Helpdesk members could be made. From now on in the section "Policy for personal settings" there is the possibility to arrange which settings the user cannot change.

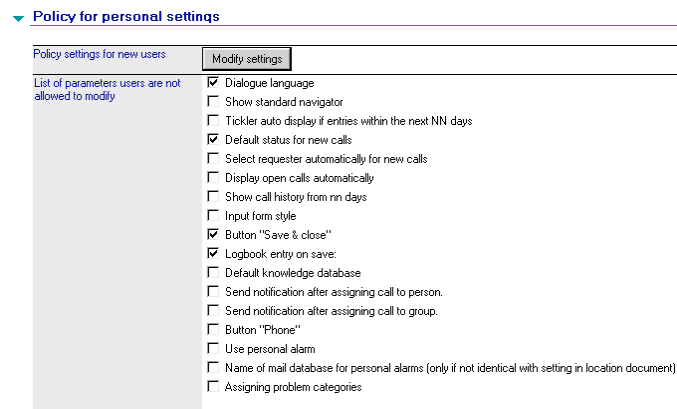


Illustration: Selection of policy for personal settings

This can be especially reasonable in cases of critical settings, e.g. for automatic notification after assignment.

Trying to change a policy the user gets a special notification.

8.5 Handling of incoming e-mails / calls

Up to this point, guidelines could be specified declaring how several fields had to be adopted from additional Notes databases into calls that came into the database via e-mail.

Now, such guidelines can also be specified for calls that are entered into the database by normal users via the standard entry mask.

9 Standard solutions

The section "Standard solutions" was significantly improved.

Up to now, standard solutions were merely normal calls which had a special flag set. Now each standard solutions is stored into a new document.

Thus, there are now two views containing standard solutions: First the normal view containing the current solution documents, second there is a view containing the old standard solutions in the accustomed layout.

Now, standard solutions can be selected from a list and easily be imported into a call. The fields that have to be transferred can be selected during the definition of standard solutions or while importing (if there are no specifications being made).

9.1 Converting old standard solutions

In order to enable old standard solutions for further use, there are two Helpdesk actions which can be used to adopt these solutions into new solution documents.

The first action generates a new solution document from the old standard solution, the second action deletes the flag from old documents, which declares them standard solutions, and eventually closes the call, which is not needed any more.



Both actions can be found within the action menu Helpdesk while editing an old standard solution.

9.2 New section "standard solution" in the call form

Within the call form a section for the selection and import of standard solutions can be inserted.

The screenshot shows the 'Call form' interface in GeoCom Helpdesk. The 'Standard solutions' section is highlighted with a red oval. It contains a list of solutions: 'harddrive crash' and 'server unreachable'. The interface includes various input fields for requester, company, case ID, urgency, and next action date.

Illustration: Section standard solutions in the call form

To show one of the selected standard solutions use the button , in order to import the data into the current call use the button .

9.3 Data import from standard solutions

So far the action "Standard solutions yes/no" only turned the standard solution flag on or off.

Now, for every standard solution it can individually be determined which fields should be imported.

Standard solution Checkmark all fields to copy into the call form when this standard solution is used

<input type="checkbox"/>	Urgency	low
<input checked="" type="checkbox"/>	Alarm	Mail Standard
<input type="checkbox"/>	Status 'closed'	done
<input type="checkbox"/>	Property	
<input type="checkbox"/>	Case type	
<input checked="" type="checkbox"/>	Problem:	server unreachable
<input type="checkbox"/>	Description:	
<input checked="" type="checkbox"/>	Solution:	check cable connection, reinstall cable connections

Illustration: Data import from standard solution

This way, e.g. a standard solution can be created that at the processing of an e-mail only fills the field "Solution". However, another standard solution can manage the same problem at the processing via telephone so that problems and detail fields are filled, too.

In case no specifications about which fields to adopt from the standard solution are being made, trying to adopt data from this standard solution will result in another dialog box which lets you specify the fields to be adopted in this instance.

Data transfer from this standard solution Checkmark all fields to copy into the call form when this standard solution is used

<input type="checkbox"/>	Urgency	low
<input type="checkbox"/>	Alarm	Mail Standard
<input type="checkbox"/>	Status abgeschlossen	done
<input type="checkbox"/>	Property	
<input type="checkbox"/>	Case type	Cat1 -> Cat2 -> Cat3 -> Cat4
<input type="checkbox"/>	Problem	harddrive crash
<input type="checkbox"/>	Description	
<input type="checkbox"/>	Solution	

OK Cancel


Illustration: 'On-the-fly' adoption of data from standard solutions

9.4 New sorting within view standard solution


The view can now be sorted according to the description of the problem.

9.5 New function for quick-closing calls

On selecting the fields which are to be adopted from a standard solution there is a field called "Status 'closed'".

If this option is activated, in the views for open calls and for calls in progress the button  can be used to quick-close certain calls.


For example, a standard solution dealing with "SPAM" could be defined, which provides calls with a spam note and closes them without further processing. Now mark the call which is to be defined as

spam and click the button . You will see a list of all standard solutions in which the field "Status 'closed'" has been activated. Choose the standard solution reserved for spam and click OK to mark this call as spam and close it without any further processing.

10 Problem categories

10.1 Changes within the field supervisor for more than one entry

Up to now, to change the responsible of multiple categories, every problem category had to be edited individually.

Now, a new action  Modify Responsible is at your disposal. Using the button “Modify Responsible” allows you to change simultaneously the supervisor for all the selected entries.

10.2 View Others – problem categories

For quick identification of supervisors, e.g. to prepare the changes of the entry in the field supervisor, the column can now be sorted.

11 Deadline monitoring and alarms

Alarm functions of GeoCom® Helpdesk have been extensively enlarged, thus, e.g. alarms can now also be set for closed calls.

So-called history documents will now save alarms which have already been triggered. These documents will be removed after a configurable time period.

11.1 New method for managing alarms

After updating the application only those documents which are created or modified after the update will be considered by the AlarmAgent.

Generally, in the section "Alarm" within the configuration document, a date can be specified which limits the number of calls that have to be considered by the agent. Only calls newer than this date will be considered when deciding whether to start alarms.

▼ Alarm

Default alarm profil	Standard
Sender info for messages via SMTP	CN*Hugo Boss/ISG/ISG
Recipient for supervisor messages	*Alarm Agent Helpdesk@geocom.de@ISG
Agent alarm	Start Stop
	Run once
Do not process documents created or modified before this date	22.10.2003
Status	Agent started
Log to file (debug only)	AgentLog.nsf
Logging restricted to call ids like (* for all)	*

Illustration: Configuration alarm start

11.2 Immediate alarm-checking

Usually, an agent regularly checks / send sends alarms and messages, if corresponding changes to the status of documents are detected.

Certain time-critical proceedings (e.g. messages must not wait for the next agent start, but must be sent immediately) alarm definitions can be prepared for execution in user mode. Calls that are subject to these certain alarm profiles do not send their alarm messages and mails on the next agent start, but immediately on saving the document after changing its status.

Name	Standard	Name of alarm definition
Sort index		Used for sorting alarm profiles in views and selections
Profile for call status	new	Enter the status this profile should work on
Checking this alarm definition	<input checked="" type="radio"/> regularly by scheduled alarm agent <input type="radio"/> immediately after status modification	Checking and sending messages could be done regularly by a server process or immediately after status modification by the helpdesk member.
Start checking from tickler date if any	yes no	If 'yes' checking is suppressed until tickler date

Illustration: Selection of alarm checking procedure

11.3 New option for alarm e-mails: send complete request

So far alarm e-mails could only be sent with an predefined text and an inserted doclink. E-mails that are sent via SMTP to extern notes addresses can now include information about the request itself.

The new placeholder [HelpdeskCall] pastes the request including the fields problem, details and solution. It can be used in the fields "E-mail

message text 1" and "E-mail message text 2" as an addition to any text.

Additionally, certain single fields from the call document can also be inserted into the message. Placeholders holding the same name as the field within the document can be used for this purpose.

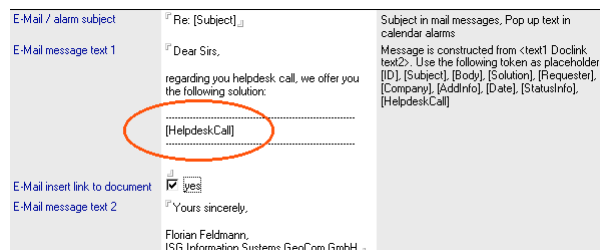


Illustration: Alarm definition with inserted request (message)

11.4 Sender of an alarm e-mail adjustable

Usually, alarm-e-mails are always sent by the ID that has last saved the alarm agent.

Analog to the configuration of the sender of an e-mail as response of a request, now the sender of an alarm e-mail can be divergently configured.

For this purpose, in the section alarm of the parameter within the option "sender information for alarm e-mails" the corresponding defaults are made.

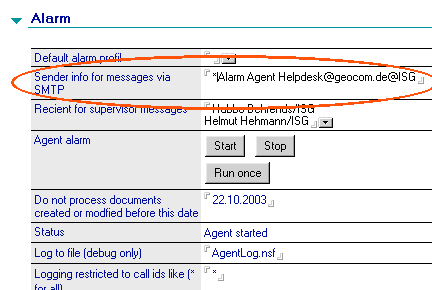


Illustration: Configuration of a sender for alarm-e-mails

Every line has got the structure "Condition | sender's definition". The text given in the conditions will be compared to the recipient and - if necessary - the sender's definition used.

11.5 Standard alarm profiles for incoming calls

In contrast to earlier versions of the application, now different standard alarm profiles for incoming e-mails and calls entered by normal users via the standard entry mask can be specified within the configuration section "Handling of incoming e-mails / user created calls".

▼ **Handling of incoming e-mails / user created calls**

Agent to convert incoming messages	Start	Stop
	Run once	
Status agent	Agent started	
Alarm profile for calls arriving as e-mail	EMail	
Alarm profile for user created calls	DB urgent	
String(s) indicating important messages	urgent	
Source definition for post-processing of incoming e-mails	Users - For incoming mail	
Source definition for post-processing of user created calls	incoming calls	

Illustration: Configuring different standard alarm profiles

11.6 New option: check on alarms not before resubmission

So far action dates for future activities were always considered. That means that as long as the date was not reached no alarm was sent.

Now, it can be determined individually for every single alarm definition if the action date should be checked or not.

Name	Standard	Name of alarm definition
Sort index		Used for sorting alarm profiles in views and selections
Profile for call status	new	Enter the status this profile should work on
Checking this alarm definition	<input checked="" type="radio"/> regularly by scheduled alarm agent <input type="radio"/> immediately after status modification	Checking and sending messages could be done regularly by a server process or immediately after status modification by the helpdesk member.
Start checking from tickler date if any	<input checked="" type="radio"/> yes <input type="radio"/> no	If 'yes' checking is suppressed until tickler date

Illustration: New parameter "Check on alarms not before resubmission"

12 Archiving

This update also contains several changes regarding the archiving function of GeoCom® Helpdesk.

12.1 Specifying directory or database for archiving

Archiving of old calls can now be done into an arbitrary directory (same procedure as before), or alternatively into a specified Notes database. Within the central configuration document place and way of the archiving can be specified.

In order to use the action “Move selected calls to archive” a fixed target database has to be specified.

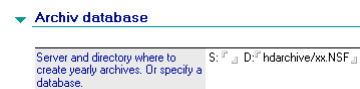


Illustration: Configuration of archiving

12.2 Move to archive by year

With this action, full years of closed calls can be archived.

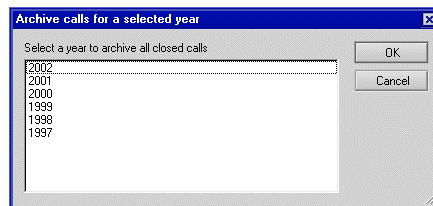


Illustration: Selection of the archive year

Prior to the actual archiving process, GeoCom® Helpdesk detects the number of affected documents and waits for the final confirmation.

During the archiving process, a progress bar will show progression of the archiving.

After the process is done the user will be asked to confirm deletion of the archived calls from the original data base.

12.3 Move selected calls to archive

With this action (which is available only if a fixed data base has been specified within the vonfiguration document) selected single calls can be transferred to the archive data base.

Used from within the archive data base this action can be used to restore selected documents back into the application.

13 Bug fix

13.1 Button colours

In some views and masks defined pre defined colours were used for the buttons. These colours can differ from the colour used in the operating system. With this version all the buttons and the background of action bars were set to the system colour.

13.2 Problem category

Using the problem category a selection error always occurred in those cases where less than the maximum number of levels was used in the first entry. This problem was solved.

13.3 Check mandatory field "Solution"

The field "Solution" is a mandatory field, when requests are at the status "resolved". So far the check notified a mistake even though there was an entry in the field "solution". As workaround the request had to be saved with the status "resolved" first before it had to be named with another action with the status "closed".

This problem was solved.

13.4 Dialog update licence

This dialog box showed a false date.

The date display has been fixed.

13.5 Alarm to call originator

The setting "Alarm to call originator" within an alarm profile resulted in an alarm to the Helpdesk staff member who created the call for the originator. Now this alarm is actually sent to the originator of the call.

13.6 Calls from normal users

Calls that were created by a normal user via the standard entry mask have up to now been invisible until the call had been turned into a Helpdesk call with a call-ID by an agent (or by hand).

Now, calls that a user creates using the standard entry mask are immediately visible within the application.