Lotus Domino® Application

GeoCom®
Helpdesk

Version 5.7 Build 185e – 08th December 2004

Update 5.7 Build 185e

Florian Feldmann
David Futterer

ISG Information Systems GeoCom GmbH
Hellweg 5-7
D-44787 Bochum
HRB County Court Bochum 4368

Telefon: +49 (0)234 94175-0
Fax: +49 (0)234 94175-16
Homepage: www.geocom.de
E-Mail: helpdesk@geocom.de

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1 Introduction

This documentation describes changes and enhancements of GeoCom® Helpdesk 5.7 Build 185e.

With the update GeoCom® Helpdesk 5.7 Build 185e some improvements were made which will be explained in the following.

2 New license key required

Upon updating to GeoCom® Helpdesk 5.7 Build 185e, usage of a new license key will be required.

3 Notes Client

GeoCom® Helpdesk 5.7 Build 185e requires systems running a Lotus Notes client, version 5.0.9 or 6.03.

4 View Standard solutions from previous versions

With the update to GeoCom® Helpdesk 5.6 already, the technique of standard solutions has been changed. The view “Standard solutions from previous versions” still held all standard solutions which had not yet been converted.

For the new update, this view has been completely removed. Thus, you have to assure that all old standard solutions have been converted to new solution documents **before updating**, otherwise you won’t be able to access old standard solutions .

5 Access rights

The access control list (ACL) now holds the new roles *[CreateTask]* and *[ViewTask-de]* resp. *–uk]*.

Users disposing of the role *[ViewTask-uk]* will have access to the view “Other – Task planning”.

The role *[CreateTask]* enables users to edit existing task documents and create new ones as well.

6 Task planning

GeoCom® Helpdesk holds mechanisms for planning tasks from version 5.7 Build 185.

With these tasks several conditions can be time-controllably checked and if necessary corresponding actions can be performed, just alike to alarm profiles within calls.

In contrast to alarm profiles, which always have to be bound to a certain call, task profiles can be defined and carried out independent of calls, and even independent of the application itself.

Thus, by means of task planning, recurrent tasks can be easily monitored, e.g. a weekly data backup or the reminder of a system report on the 3rd workday in each month.

Upon fulfillment of the corresponding condition a task profile can perform nearly any action by starting a self defined agent that carries out the desired actions.

6.1 Access rights

Within the access control list there is now the additional role *[ViewTask-uk]*.

Users disposing of this role have access to the view “Other – Task planning”.

This view shows all existing task documents within the data base, by default sorted by condition. In order to easily find and access certain documents, the view can also be sorted by Task-ID, checking interval or last modifier.

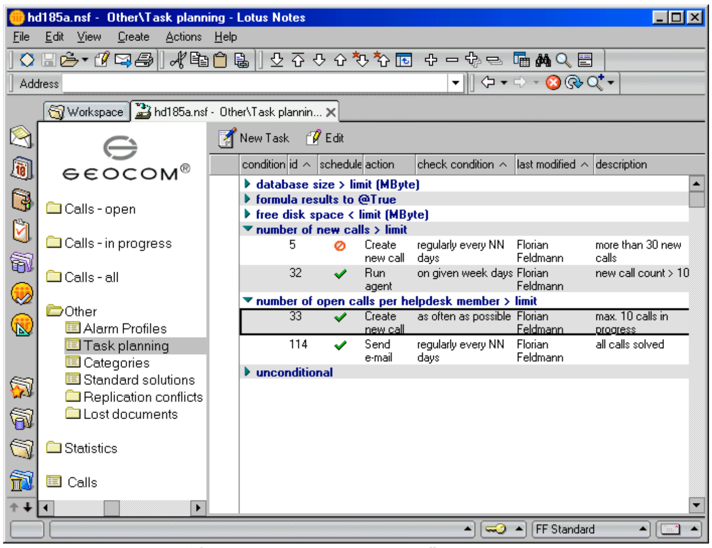

Illustration: View “Other – Task planning”

From within the view “Task planning” new task documents can be created as well as existing ones be managed.

Creating new task documents, however, additionally requires the role *[CreateTask]*.

6.2 Create new task

To create a new task switch to view “Other – Task planning”. Then click the button “New Task”. The following form appears into which you can define the task:

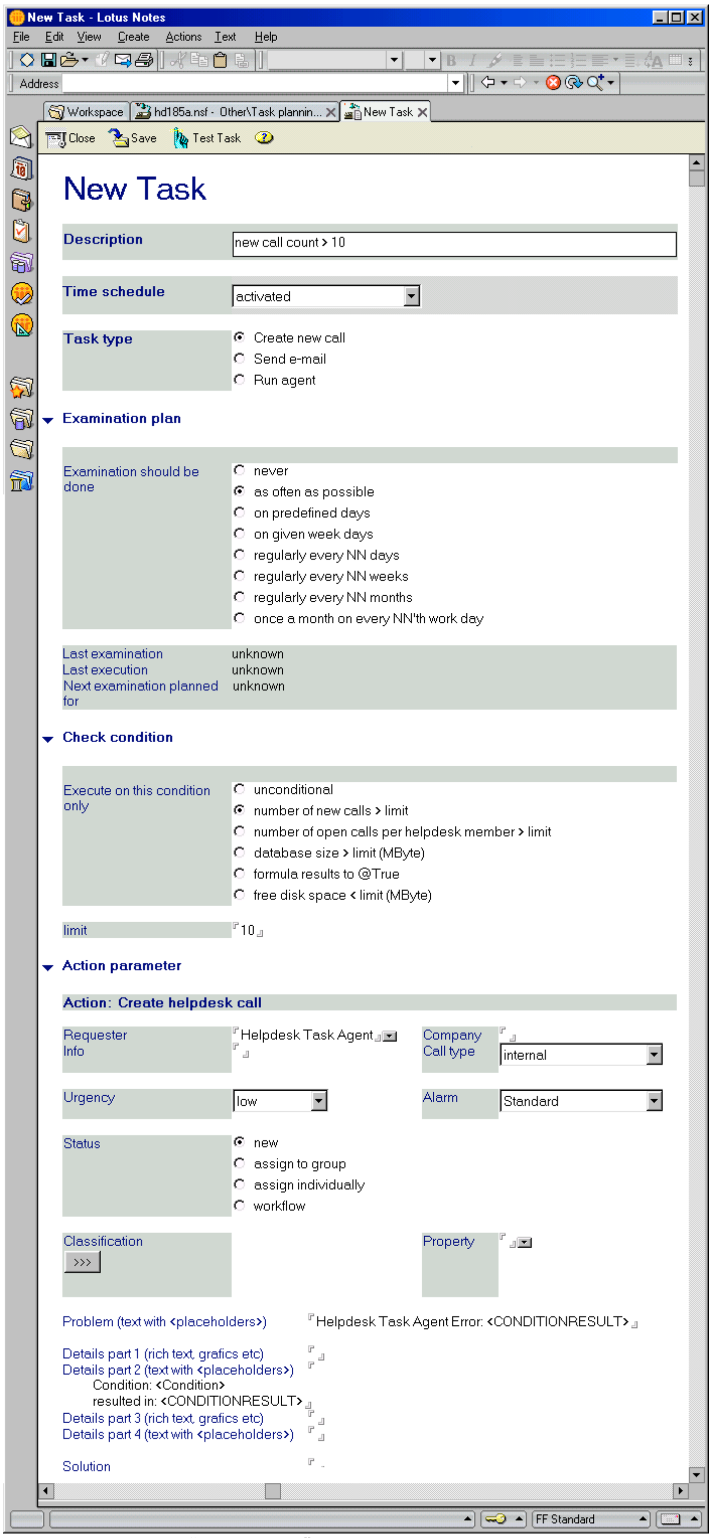

Illustration: Form “New Task”

First enter a description to be able to identify this task later on.

The parameter “Time schedule” decides whether or not this task will be checked by the task agent.

If an existing active task should transitionally be ignored by the task agent, or a passive task should be re-activated, it is enough to change this parameter within the corresponding task document.

This parameter is also important for tasks which should be manually tested before they will be inserted into the normal routine, because tasks can be finished via the “Test” button although they are deactivated for the time schedule (see 6.3 Testing tasksREF).

6.2.1 Task type

The section “Task type” lets you determine which kind of action should be carried out by this task. The available options are:

- Create new call
- Send e-mail
- Run agent

Depending on the kind of action you wish to be carried out, the section “Action parameter” will hold different options.

The sections “Examination plan” and “Check condition” are independent of the selected task type.

6.2.1.1 Action parameter: Create new call

If the task shall create a new call within the Helpdesk application, the section “Action parameter” lets you define all fields of the call (including all header fields).

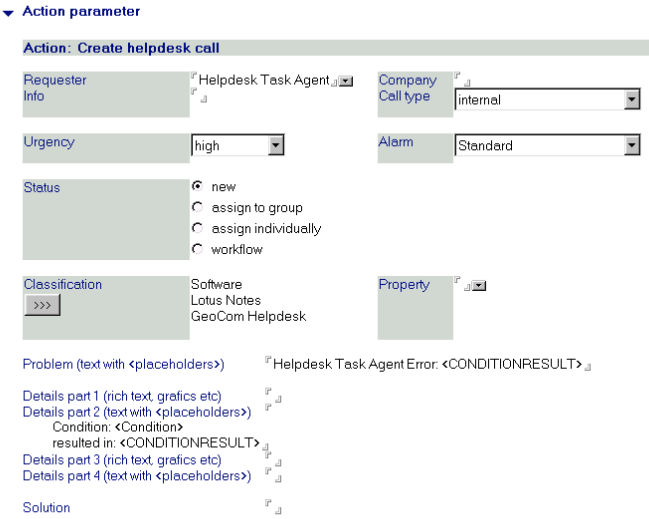

Illustration: Action parameter “Create Helpdesk call”

Of particular interest are the fields “Requester” (to be able to recognize the call as created by a task action) and “Problem”, as well as a possible “Alarm profile” which the newly created call shall be subject to.

The first and third “Details” fields can hold RichText Items, such as screenshots, whereas the fields two and four can hold normal text as well as certain placeholders.

The “Problem” field can also include placeholders.

The “Placeholder help” button shows a list of all available placeholders:

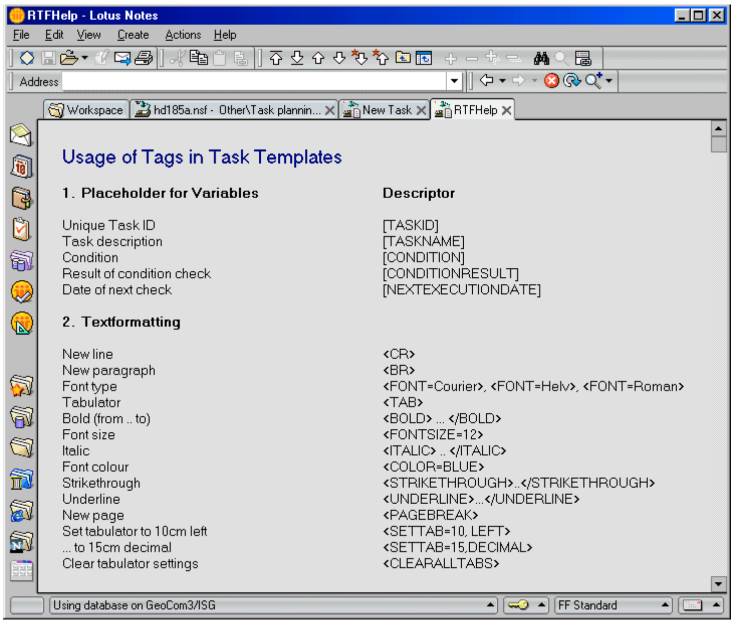

Illustration: Available placeholders

6.2.1.2 Action parameter: Send e-mail

Instead of creating a call within the Helpdesk application, the task can also send an e-mail to a certain person or group of persons.

In section “Action parameter”, first select the recipient(s) for this e-mail and enter a source identifier. This source identifier has to be of the same syntax as the “Sender info for messages via SMTP” from section “Outgoing messages” within the global configuration document (see also administration documentation), e.g.

*** | helpdesk@geocom.de**

In this case for all recipients the sender address helpdesk@geocom.de would be used.

Then enter a subject for the message and its body. The fields “Body part 1” and “Body part 2” are RTF-fields and thus can hold arbitrary information, such as screenshots etc.

Parts two and three of the message body can hold simple (ASCII) text messages as well as certain placeholders, just as it is the case with creating new calls.

Using the button “Placeholder help” will show a list of all available placeholders

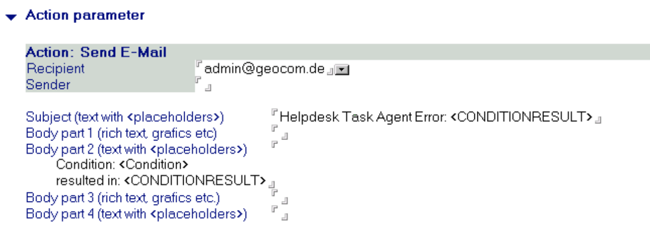

Illustration: Action parameter “Send E-Mail”

6.2.1.3 Action parameter: Run agent

Instead of a notification of some sort, the task can also provoke an action directly by starting an agent from an arbitrary database.

To create a task which starts an agent, first enter the path and file name of the database which holds the agent into the field “Database”. Into the field “Agent name” you have to enter the identifier of the agent that is to be called.

Note that only agents from databases that are located on the server which runs the Helpdesk application can be started!

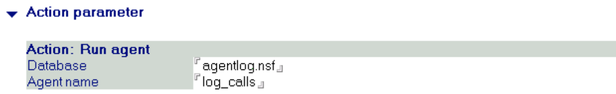

Illustration: Action parameter “Run agent”

6.2.2 Examination plan

This section defines the date(s) and time(s) at which the condition should be checked for fulfillment. The possible selections are:

- **never**
  This task is inactive. The condition will never be checked and thus the corresponding action will never be carried out.
- **as often as possible**
  The condition of this task will automatically be checked each time the task agent is running.
- **on predefined days**
  Enter the desired date(s) and time(s) into the text field. The condition will only be checked at the given times.
- **on given weekdays**
  Select on which weekdays the check should be done, the date of the first check as well as the time at which the checks should be performed.
- **regularly every NN days**
  Select the interval of days in which the checks should be done, the date of the first check as well as the time at which the checks should be performed. Additionally, you can specify whether checks should be deactivated on weekends.
- **regularly every NN weeks**
  Select the interval of weeks in which the checks should be done, the date of the first check as well as the time at which the checks should be performed.
- **regularly every NN months**
  Select the interval of months in which the checks should be done, the date of the first check as well as the time at which the checks should be performed. Additionally, you can specify whether checks should be deactivated on weekends.
- **once a month on every NN work day**
  First specify the number of the work day at which the check should be performed. A negative value will result in counting work days backwards from the end of the month. Select as well the date of the first check as well as the time at which the checks should be performed. Additionally, you can specify whether checks should be deactivated on weekends.

At the end of this section the last examination date is shown, the last execution date and the date of the next planned examination.

6.2.3 Check condition

The condition specified in this section has to be fulfilled upon the time of examination, otherwise the task will not execute.

- **unconditional**
  This task will be executed immediately upon examination, regardless of any further conditions.
- **number of new calls > limit**
  Enter the desired threshold value into the text field.
- **number of open calls per Helpdesk member > limit**
  As soon as at least one Helpdesk member holds more than the specified number of calls in progress, this action will be accomplished. Within the condition result (which is accessible via the placeholder [CONDITIONRESULT]), a list of all Helpdesk members holding more than the specified number of calls in progress will be shown, including the number of open calls each.
- **database size > limit (MByte)**
  Specify a database (via path and file name) which size is to be checked. Once the file size of the database exceeds the desired limit (given in Megabyte), the action will execute. This condition always refers to the executing system. Thus, testing this task via the corresponding button (see 6.3 Testing tasks), would result in searching for the specified database on the local system, whereas the execution by the corresponding agent running on the server would search for the file on the server hard disk.
- **formula results to @True**
  Enter a Lotus Notes @Formula. The result of this formula will be determined upon examination of this task. The action will execute if the result of the formula is '@True'.
  

  Using the button "Test" will calculate and show the result of this formula in advance. Note that this condition always refers to the executing system. Thus, testing this task via the corresponding button (see 6.3 Testing tasks) would calculate the result locally, but execution via the corresponding agent running on the server would check the server environment. Usage of e.g. "@Version" would show the local client version upon testing. Upon execution by the agent running on the server, the version of the Notes server would be shown.
- **free disk space < limit (MByte)**
  This task will execute if the available disk space on the specified partition is less than the given limit in MB. This condition always refers to the executing system. Thus, testing this task via the corresponding button (see 6.3 Testing tasks**Fehler! Verweisquelle konnte nicht gefunden werden.**) would calculate the remaining disk space on the local hard drive, whereas execution by the agent running on the server would check the server hard disk.

6.3 Testing tasks

When you have defined all settings for this task save the document via the corresponding button.

In order to check the functionality of a task, you can use the button "Test Task". Upon using this button first the next examination date of the task will be calculated and be displayed.

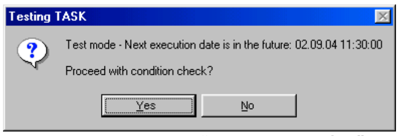

Illustration: Dialog “Testing TASK” – date

Upon confirmation of this dialog the condition of the task will be checked, as if the next examination date were just now.

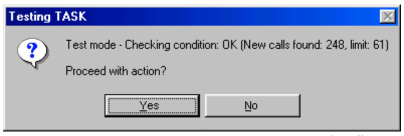

Illustration: Dialog “Testing TASK” – condition

If this dialog is also confirmed the action specified within the task will be finished (a corresponding Helpdesk call will be created, an e-mail be sent or an agent be started).

In this context, it does not matter whether the condition check has been positive or negative, the action will be accomplished anyway.

After execution of the action has been completed, the last execution date will be updated and entered into the document. Testing tasks, however, does NOT modify the date of the next planned examination!

If one of the two dialogs is cancelled by answering with “No”, the action will not execute. In this case, also the last execution date will not be updated.

6.4 Checking conditions at runtime

At runtime, a special agent (Run Task Agent) that can either run independently, or be bound to the alarm agent, serves to regularly check the tasks.

For all current tasks (examination date = now) the conditions are checked. In case this check is positive, the corresponding action will be executed and the values for “Last examination” and “Last execution” are updated.

If the Run Task Agent detects an error in the task documents, further processing will be cancelled and a corresponding Helpdesk call will automatically be generated.

7 Application enhancements

7.1 Configuration Calculate call type via formula

Within the section “Handling of incoming e-mails” in the global configuration document a new field named “Calculate call type via formula” exists. This field can hold an @formula that will be evaluated based on the incoming e-mail. The result of the formula will be entered as call type.

Normally, incoming e-mails the call type “E-Mail” is assigned to. For special e-mails, like e.g. internal tasks or voice messages, another call type can be calculated depending on the sender’s address or the subject line of the message.

The following call types are implemented into the application:

Phone	"1"
E-Mail	"2"
Letter	"3"
Fax	"4"
internal	"5"
Voice message	"6"

This enhancement has been added to the application in version 185.

7.2 Configuration Send additional information

The section “Outgoing messages” from the global configuration document has been extended by a new field “E-Mail-Address of the Helpdesk-Application”. The value of this field will be used as recipient’s address when sending an e-mail via the button “Send additional information”.

This enhancement has been added to the application in version 185.

7.3 Configuration Disclaimer

Also in the section “Outgoing messages“ the field “Disclaimer“ has been inserted. This field is a RichText field, meaning it can hold arbitrary information, such as texts, screenshots and so on.

The data inserted into this field will be appended to every outgoing e-mail sent as reply from within the application.

A disclaimer could e.g. hold legal information, restrictions of liability or just the sending company’s address.

This enhancement has been added to the application in version 185e.

7.4 Configuration of data adoption when replying

By default, when replying to calls from within the application, the field “Solution“ has been adopted into the outgoing e-mail. If this field was empty, the field “Body“ was used instead.

In order to override the “empty-check“ of the field “Solution“, the following parameter can be specified within the global configuration (section “Special settings – language independent“):

REPLYTRYFIELDLIST:

This parameter (which by default would be 1) overrides the “empty-check“ of the “Solution“ field.

Additionally, the parameter

REPLYFORCEFIELDLIST:Body<>Solution

can be used to force adoption of both fields (“Body“ and “Solution“) into the outgoing e-mail, regardless of their content.

This enhancement has been added to the application in version 185e.

7.5 Internal view (BROWSE)

This view now shows English column identifiers in addition to the German ones.

This enhancement has been added to the application in version 185.

7.6 Field definitions for call assigning

In addition to the semicolon, now the tags <CR> (carriage return, line feed) and <TAB> (tab stop) can also be used for text formatting.

This enhancement has been added to the application in version 185.

7.7 Tags [Body] and [Solution] in alarm profiles

Up to now, using the tags [Body] and [Solution] in e-mails generated by alarm profiles only inserted the text part of the designated RTF fields-Now, using the corresponding tags results in copying the full content of the RTF fields into the new e-mail.

However, if the tags [Body] and/or [Solution] are used to fill the subject line of the new e-mail, still only the text part of these fields will be adopted into the mail.

This enhancement has been added to the application in version 185d.

7.8 New actions for alarm profiles

The options “E-Mail to call originator (only once per call)“ and “Alarm to call originator (only once per call)“ have been added to the list of actions for alarm profiles.

These two actions behave exactly like the actions “E-Mail -“, resp. “Alarm to call originator“, except for the fact that independent of other alarm profiles or status changes, for this very call no more e-mails or alarm messages will be sent to the originator of the call.

This enhancement has been added to the application in version 185e.

7.9 New triggers for alarm profiles

The options “Recipient contains” and “Recipient does not contain” have been added to the list of triggers for alarm profiles.

Thus, e.g. different mails for acknowledgement of receipt can be sent depending on whether the call has been received via the internet or via the local area network.

This enhancement has been added to the application in version 185.

7.10 Call open time and tickler dates

Up to now, the call open time from view “Statistics – a. call open time” has been calculated by computing the difference between the current date and the time of first taking responsibility for this call, regardless of potential tickler entries.

The global configuration document now holds a section “Statistics” with the field “Calculation of call open time – check tickler date”. If this checkbox is activated the times between setting tickler dates and the actual tickler date itself will not be regarded when computing the call open time. The time following the tickler date will be added to the potentially already existing call open time.

This enhancement has been added to the application in version 185.

7.11 Replication conflicts

The section “Other” has been expanded by the folder “replication conflicts”, which can only be accessed by users disposing of the role [admin].

A replication conflict occurs, each time multiple users open the same document and save different field values to this document.

To view all current replication conflicts the button “refresh folder” can be used. This action may be time consuming as the whole database has to be searched for conflicts.

For each replication conflict found, the main document will be shown, as well as the corresponding conflict document. In order to compare the fields of the documents, the button “compare documents” can be used. All differences between fields will be listed.

This enhancement has been added to the application in version 185.

7.12 Call open time in statistic reports

Upon creating new statistic reports, data can now also be sorted by call open time. The column with the call open times then replaces the column showing the current work time of the calls.

7.13 Sending an answer to multiple recipients

Up to now, answers to multiple recipients have always been sent as separate e-mails in order to separately check the addresses for errors, e.g. provoked by unknown Notes addresses etc. As a result of this, no recipient was able to see the full recipients' list of the e-mail.

The special setting [REPLYALLOWMULTIPLERECIPIENTS:1] can now be used to suppress separate delivery of e-mails. In this case, only the first recipient's address will be checked for errors and the mail will be delivered as single mail with full recipients' list. This list can be viewed by all recipients of the e-mail.

This enhancement has been added to the application in version 185d.

8 Bug fix

8.1 Default value “1“ for property

If, upon selecting the property from within the Helpdesk call form, no property had been selected but the dialog confirmed with “OK”, the default value “1” was entered into the property field.

Now the field remains empty when not choosing a property.

8.2 Linefeeds in work logs

Linefeeds that were manually entered into work logs (by using the “Return” or “Enter” key), were coded as “<CR>” within the work log, the linefeed was not properly displayed.

Now linefeeds will not be coded as <CR> but displayed correctly.

8.3 Comma or semicolon within the subject line of calls

Calls that have a comma or semicolon within their subject line could not be selected via the regular selection dialog boxes. This also applied to standard solutions which had a comma or semicolon within their subject line.

The problem has been solved by hiding commas and semicolons within dialog boxes.

8.4 Assigning calls to multiple persons – Representation

Upon assigning calls to multiple persons, the main category from all “…by editor” views has not been properly displayed.

This error has been fixed.

8.5 Assigning calls to multiple persons – Alarms

Upon assigning calls to multiple persons, only the person listed first was notified about the assignment via alarm message, the following persons were not notified.

This error has been fixed.

8.6 Suppressing alarms for tickler entries

The setting “Start checking from tickler date if any” had no effect, when the trigger “immediately” had been selected. In all other cases the setting was considered reversely.

This error has been fixed.

8.7 Import of data into documents not yet saved

Upon importing data into a not yet saved document, i.e. if a new document has been created but not yet saved, the form for normal users has been shown after import instead of the extended Helpdesk form.

This error has occurred in version 185 and applies to importing calls from the personal mail database as well as importing data from connected external databases.

The error has been fixed in version 185d.

8.8 Import of calls with a textfield as body

The import of calls which had a plain text field as body field (instead of a RichText field), resulted in a “type mismatch“ error message.

This error first occurred in version 185 and has been fixed in version 185d.