GEOCOM®

Lotus Domino® Application

GeoCom®
Helpdesk

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Manual for
Helpdesk staff members

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1 Introduction

GeoCom® Helpdesk is a support system that helps to solve problems that can arise in enterprises with close customer relationships. It is possible to monitor the complete support cycle (recording of incoming calls, delegation of pending tasks, troubleshooting).

It enables Helpdesk staff members to handle the inclusion, forwarding and revision of incoming calls as well as to supervise the complete process of solving problems.

Every incoming e-mail, phone call, fax or letter sent by colleagues, members of the company or external customers will be registered and identified directly by Helpdesk staff members.

All important functions are ad-hoc available by a few mouse-clicks, either via Notes client or using the web browser interface.

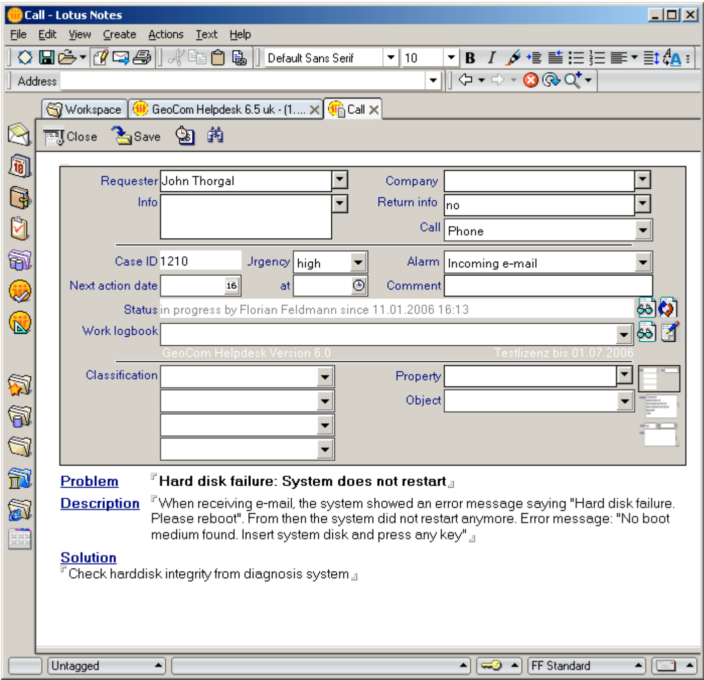

Illustration: Call form, Notes client

Members of the Hotline or specialists of the Second-Level-Support evaluate the call, and search for solutions in determined databases in order to solve the problem. The solution can be integrated in a permanently growing Knowledge base in order to have data quickly retrievable.

The entire working process can be supervised permanently through authorised persons. That guarantees not only a solution process as quick as possible but also helps to cultivate the relationship to customers and clients.

2 Working area

After opening the database, Helpdesk staff members see their personal working area. Notes client and web browser show the same views.

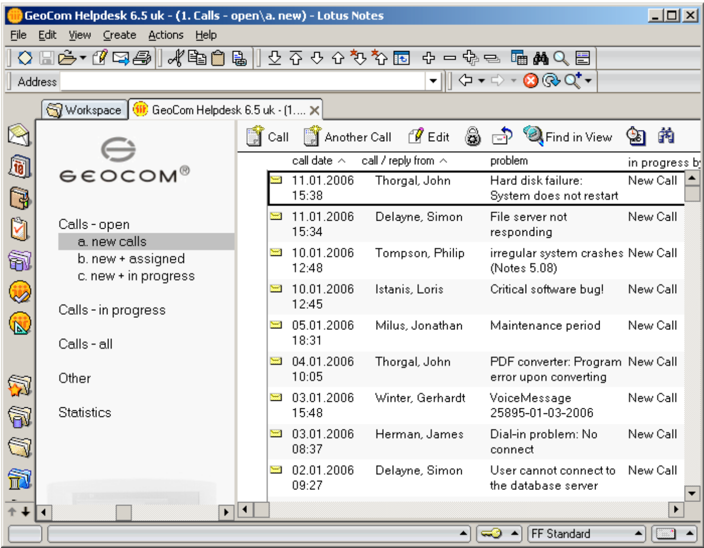

Illustration: Personal working area, Notes client

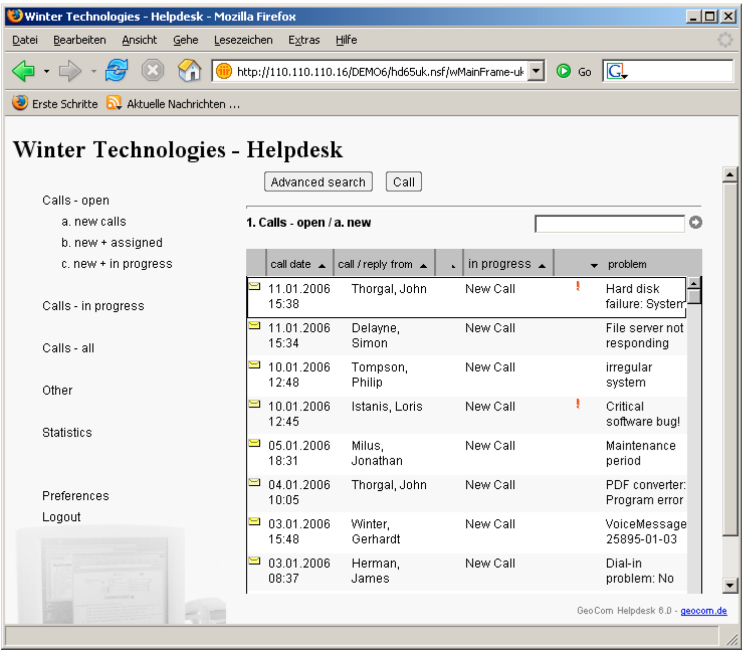

Illustration: Personal working area, web browser interface

The entire cycle of processing incoming calls can be observed. Authorised persons have access to all views.

The Helpdesk-menu displays the following views

- Calls – open
- Calls – in progress
- Calls – all
- Other

These main views can be subdivided in specific sub views in order to gain detailed information about the ongoing process.

All views showing calls provide information regarding

- Requester
- Date of a call
- Status of a call (e.g. new call)
- Problem description

2.1 View "Calls - open"

The view **"Calls - open"** not only lists all new calls, but also shows all assigned calls (individually or to a group). This makes it possible not only to get an overview of how many new calls there are within the Helpdesk but also to see how many new calls are just delegated to experts. The view contains information to the call date, the requester (the person who sent the e-mail), the next date, and the name of the person who should solve the problem (in progress by). Finally the view shows a brief description of the problem.

This view contains three different sub views:

a. new (this view only shows calls which have the status “new”, i.e. which have not been processed in any way, yet)
b. new + assigned (besides all calls listed under a. this view also contains calls that have been assigned individually, either to a specific person or to a group)
c. new + in progress (this view lists all new calls as well as all calls which are currently in progress, sorted by editor)

2.2 View "Calls – in progress"

The view **"Calls – in progress"** only shows those calls that are in progress, i.e. which have any status, like calls in progress (symbolised by a letter), calls assigned (symbolised by a head), calls just solved (symbolised by a tick) or closed calls (symbolised by a padlock).

The view provides information respective to the following items:

a. by requester
b. by editor
c. by status
d. by property
e. by workflow

New and closed calls will not be displayed within this view.

2.3 View "Calls – all"

This view displays all calls that are registered by the Helpdesk.

It can be subdivided into five different sub views in order to get a completely structured overview of actual working processes.

The view provides information respective to the following items:

a. by requester (alphabetically sorted list of all requesters' names)
b. by editor (names of all Helpdesk staff members including respective calls with action date, calls in progress, personally assigned calls, resolved and closed calls)
c. by status (calls in progress, assigned, resolved and closed calls)
d. by property (calls by predefined properties)
e. by category (calls by predefined categories)

2.4 View "Other"

The view **"Other"** can be subdivided into four different sub views: “Categories”, “Standard solutions”, “Standard solutions from previous versions” and “Alarm profiles”.

Additionally, the folders “Replication conflicts”, “Lost documents” and “Configuration (Backup)” can be found here, corresponding access rights assumed.

The sub view ”Categories” shows an overview of all problem categories (including sub-categories, e.g. “software”, more specific “application”, more specific “MS-Excel”)

The sub view “Standard solutions” shows an overview of all solutions that are saved to the database for future solving strategies.

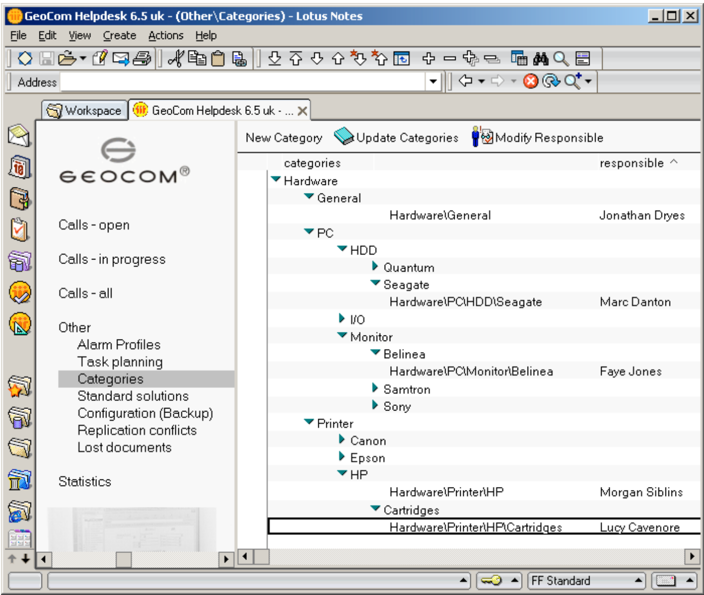

Illustration: View Other – Categories

The sub-view “Alarm profiles” shows an overview of all defined and distributed alarm profiles. This view will only be displayed if the role [AlarmProfile] was checkmarked within the access control list.

The view also contains information to the status, to the specific action as well as to the trigger (e.g. status not changed for XX hours).

The view “Task planning”, which is only visible if the role [ViewTask] has been activated in the ACL, shows all currently defined task documents, sorted by condition, ID number, checking time and last editor.

☛ **INFO:** The view “Statistic” which could previously be found within this group of views is an additional view now, but is only shown if the role [Statistic] has been checkmarked within the ACL.

3 Generating new calls

The process of generating new calls can be done in different ways:

1. Usually the user generates a call by filling out the call form (a special mask) of GeoCom® Helpdesk. Therein, the user can enter a description of the problem and deposit an address to where the solution should be transmitted (e-mail, telephone, fax). Finally, the document will be saved to the database. This form is available both via Notes client and web browser interface.
2. Calls of external members or customers who do not count with an access to the LAN can be transmitted to the Helpdesk via telephone, fax or letter. The Hotline takes responsibility and immediately generates a new call by filling out the call form, either within the Notes client or via the web browser interface.
3. The third possibility is that the database GeoCom® Helpdesk itself functions as a mail-in-database. All new notifications will automatically be registered as new calls and integrated into the workflow.

An unambiguous ID-Number will be assigned to each new call during saving process. The user can ask for this specific ID-Number in order to pursue the solution process.

In order to edit a call, first checkmark the corresponding call with one mouse-click (so that it appears highlighted within the right side of the screen) then click the button “Edit” within the action bar. The call form opens. After editing the call save the document to the database.

☛ **INFO:** Press "**Esc**" to close a view or to abandon a window.

3.1 Recording calls through “normal” users (requesters)

GeoCom® Helpdesk offers a special call form (a special mask) for users in order to create and save new calls to the database.

The view "Calls – open" holds the button "New Call" which can be used to open the following call form that can also be sent as e-mail.

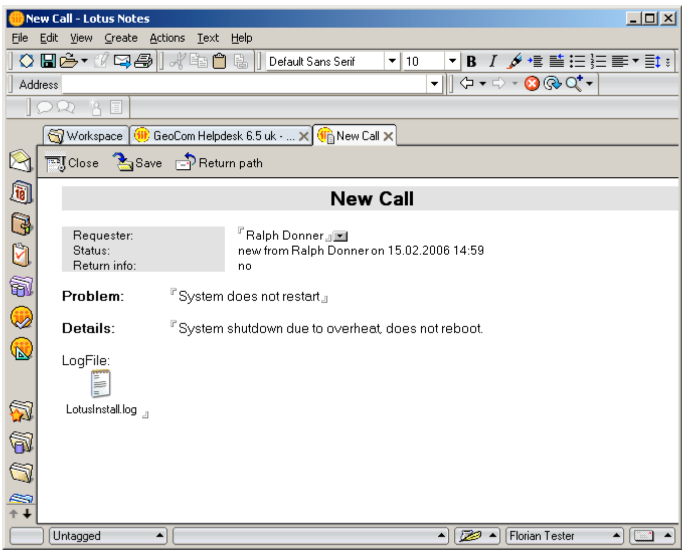

Illustration: Standard call form for users

The field “Requester” contains the name of the person who sends a new call to the Helpdesk. The name of the person actually working with this application is automatically adjusted. However, it is possible to select another person from the Notes address book.

Aside from a brief description of the problem the user can enter additional information like screenshots or attachments of data files, for example.

With the button “Return info” within the action bar the requester can select the way the notification should be transmitted, e.g. via e-mail, telephone or fax. Additionally it is possible to select the person to whom the notification should be transmitted.

Illustration: Dialog box return info

For the ongoing solution process the document will be saved to the database via the button “Save & close”.

Aside from this, all requesters have the option to send additional information (new calls) to the original call to Helpdesk once a member of the Helpdesk has taken responsibility for it.

In order to send additional information first select the view “Calls – in progress“ and click on the corresponding document (original call). The document with the original call will be opened.

In order to send an additional information to the Helpdesk click on the button ”Send additional information” within the action bar.

The following window appears:

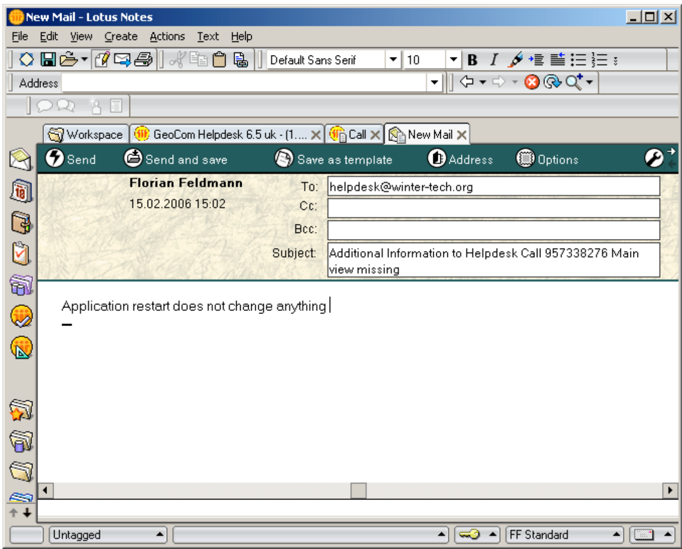

Illustration: E-mail as additional information to the Helpdesk

The e-mail-address of the Helpdesk, e.g. helpdesk@company.uk, is preselected. Enter your additional information into the message section of the e-mail.

Click the button “Send” in order to send the additional information to the Helpdesk.

☛ **INFO:** The field “Subject“ just contains the notice that it‘s an additional information that refers to the original call.

3.2 Recording calls through Helpdesk staff members (Hotline)

In addition to the possibility to create a call through the user himself, it is also possible that a member of the Helpdesk (Hotline) generates new calls in the name of a requester (e.g. a customer communicates with the Helpdesk in order to describe an occurred problem). Usually this is when requesters contact the Helpdesk by phone, letter or fax.

Contrary to the call form that is available for “normal“ user and external customers, Helpdesk staff members (Hotline or First-Level-Support) count with an extended call form in order to create a new call.

3.2.1 The call form for Helpdesk staff members

Helpdesk staff members dispose of an extended call form for problem call recording. Using this advanced call form it is possible to search and select the category for this call alternatively from a list or by full text search.

Aside it is possible to declare an opened call as standard solution. To do so select “Actions – Helpdesk – Make new standard solution" from Menu bar (see also “Standard solutions”).

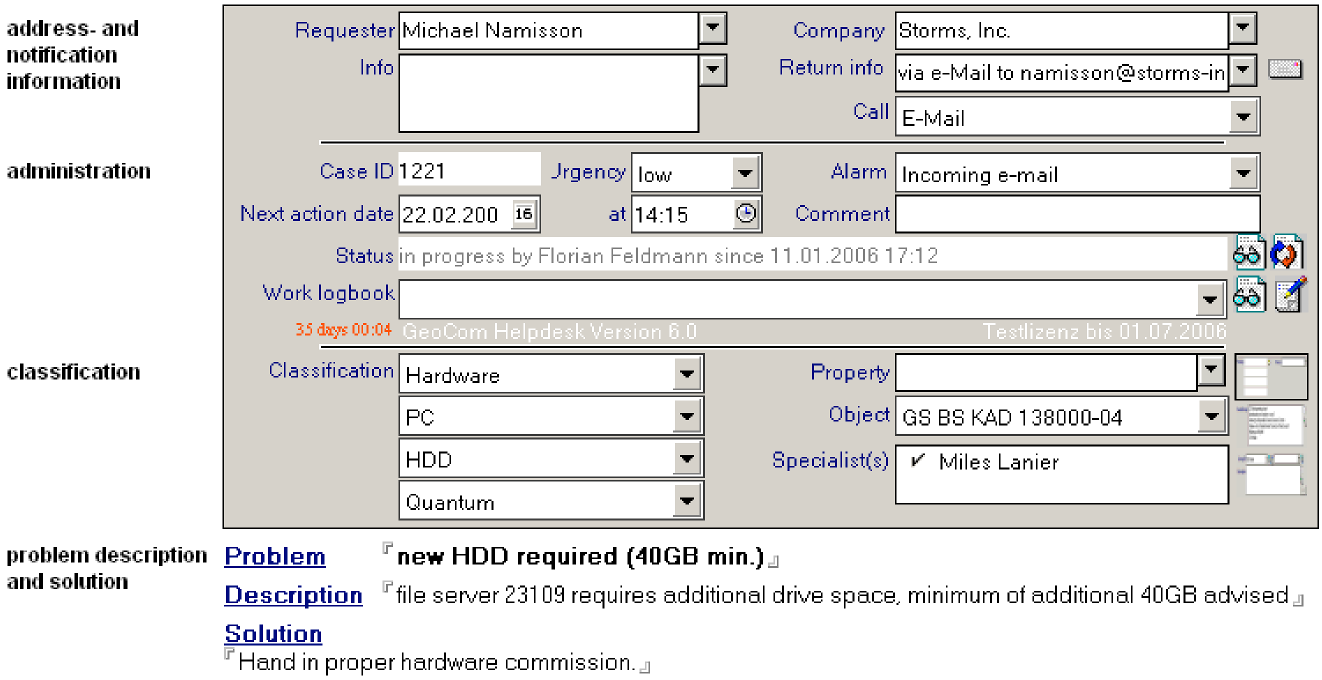

Illustration: Section and fields to record a new call (advanced call form)

3.2.1.1 Address- and notification information

Using the section **address- and notification information** you can set additional information or complete data respective to the requester.

This section has five fields:

1. Field "Requester": Name of the requester (person). The name can either be retrieved from a customer database by one mouse-click or manually filled into the call form.
2. Field "Info": Fill in additional information like phone number etc.
3. Field "Company": If the customer database contains information about a requester, the company name will be adopted to the call form. If not, it is possible to fill in a company's name by hand.
4. Field "Return info": Here you can select the way a notification should be transmitted, e.g. phone, fax, e-mail etc.
5. Field “Call type”: You specify the way of contact this call was established with (e.g. phone call, e-mail etc.).

3.2.1.2 Administration

The section **administration** serves to set the entire support cycle (recording of incoming calls, delegation of pending tasks, troubleshooting).

This section has eight fields:

1. Field "ID": An unambiguous ID-number will be assigned to each new call. It is possible to communicate the ID-number to the requester. This ensures that the requester can supervise the ongoing solution process.
2. Field "Next date": Using the Notes calendar you can determine the ongoing solution process, i.e. here you can specify on which date a specific action should be carried out.
3. Field "Priority": Using the pull-down-menu you can set the priority of the solution process between “high” and “normal”. Urgent calls with ”high” priority are specially marked within the views.
4. Field "Time": Using the time scale you can set a specific time to that a specific action should be carried out. Confirm your selection by clicking on the green tick (symbol).
5. Field "Alarm": It is possible to set up alarm profiles corresponding to customers needs. Such profiles helps supervising the solution process by sending warning signals to determined support members in order to fasten the working process. Further, this guarantees that the agreements according to each client can be carried out in time. The alarm standard is pre-defined, however, customer specific alarm profiles can be selected from the pull-down-menu (e.g. Alarm Winfield & Partner Company)
6. Field "Comment": This field serves to enter comments regarding the solution process, e.g. personal meeting, phone call etc.
7. Field "Status": The current status of the solution process as well as the responsible person will be indicated.
8. Field "Work logbook": Use this field to create a new work log entry

(see "Creating work logs")

3.2.1.3 Classification of problems

The section **classification of problems** serves to classify the call according to the description of a problem in order to automatically retrieve the specialist on the Second-Level.

This section has four fields:

1. Field “Classification”: Classification according to four levels either via pull-down-menu or via list. According to the classification through the hotline, a specialist will be traced. Existing categories can be modified at any time, just as for creating new categories (see classification of problems).
2. Field “Property”: Using the pull-down-menu you can select a previously defined property, e.g. a specific project.
3. Field “Specialists”: This field remains hidden as long as no classification of a problem was done.
4. Field “Object”: This field will only be visible if a corresponding selection list has been defined within the global configuration document.

Via the selection buttons on the right side of this section you can switch between showing the sections Classification, Knowledge base or Standard solution.

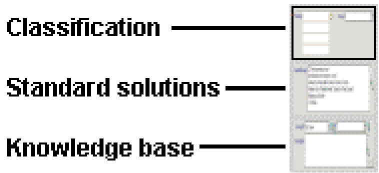

Illustration: Switching sections within the call form

3.2.1.4 Standard solution

The section **Standard solutions** contains all available standard solutions.

By clicking the button ”Adopt standard solution” you can adopt this standard solution into the current call.

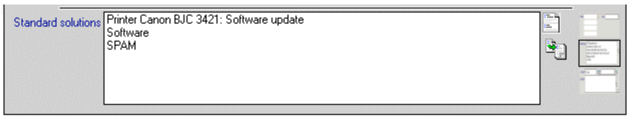

Illustration: Section Standard solution

3.2.1.5 Knowledge base

The section **Knowledge base** serves for Helpdesk staff members to search for solutions in connected knowledge bases and hitherto calls.

This section has three fields:

1. Field Knowledge base: Using the pull-down-menu you can select between the connected databases to start a search.
2. Field Search terms: Enter a search term in order to run a search in hitherto calls.
3. Field Search result: This field displays the hits found.

Illustration: Section Knowledge base

3.2.2 Call assigning

Hotline-members can create new calls in the name of users (e.g. in-house-employees) or for external customers (service). Both, the administration of address and notification information and the description of a problem can be done in different ways:

- Data regarding the requester can be entered into the call form by hand
- Data regarding the requester can be adopted into the call form automatically

In the following sections each procedure will be described.

3.2.2.1 Manually assign address- and notification information

The call form can be filled by hand through the members of the Hotline. Usually this is necessary, when an in-house-employee or a customer informs the Hotline about a problem via phone.

In order to create a new call in the name of another person (employee or customer) click on the button “Call” within the action bar.

You will get the advanced call form to record a new call.

The following information can be fixed to the section address- and notification information:

Field “Requester” Enter the customers name resp. the name of in-house-employee.

Field “Info”: Fill in additional relevant information, e.g. phone number of a contact person etc.

Field “Company”: Enter the name of the company

Field “Return info”: This serves to determine, if a notification should be transmitted directly to the requester or another person. Aside the way the transmission should be done can be specified, e.g. via phone call or e-mail etc.

3.2.2.2 Automatically assign address- and notification information

It is also possible to automatically complete the fields with relevant data. However, it is necessary that a customer database is available.

In case of in-house-employees personal data (name etc.) can be retrieved from the Notes address book.

Similar to the above described procedure, click on the button “Call” within the action bar in order to get the call form.

Corresponding to the configuration also a dialog box appears that displays a customers list (Customer’s database). Select the corresponding contact profile from the list (person, who sent the call to the Helpdesk).

Illustration: Dialog box selection requester

If the customer and the contact person are found, click on the button OK.

In order to get the name of the contact person, click on the preceding green twisty. The view will be enlarged. Then select the corresponding contact person by mouse-click, so the entry is highlighted. Data will automatically be adopted to the corresponding fields within the call form.

Illustration: Dialog box selection contact profile

Using the button “Open document” within the call form you have access to the corresponding document within the customers database.

Use the field “return info“ to set the way a solution should be transmitted to the requester.

Illustration: Dialog box return info

Using the pull-down-menu you can set the priority of the solution process between “high” and “normal”. Urgent calls with ”high” priority are specially marked within the views by a red exclamation mark ( ) .

Aside it is possible to set up specific alarm profiles, that supervise all changes of status. This ensures that the agreements according to each client can be carried out in time.

3.2.2.3 Assigning new calls to existing calls

New calls that refer to existing calls can exactly be assigned.

To do so use the action “Assign call to existing problem” while editing the call document.

Illustration: Action Assigning new call to existing call

Illustration: Dialog box selection a call for assignment

After assigning the call it will be saved as notification document to the main call (problem).

Illustration: Detail of a view with an assigned document

3.3 Sending notification to the database

If a corresponding SMTP-MTA is configured the user can even send an e-mail to a non-existent address like helpdesk@company.uk. Automatically this e-mail will be integrated into the working process and even calls with an incorrect address can be solved.

4 Working process

Within the entire working process every call runs different states, representing the current work state of the call.

States of calls:

New: Every incoming call automatically gets the status “new call”. It remains until a Hotline-member takes responsibility for the call.

In progress: As soon as a member of the Helpdesk assumes responsibility for a new call, the status changes into “in progress”.

Assigned to a group: A group of specialists can be engaged in order to solve the problem.

Assigned individually: Similar to the process of assigning a call to a faculty, however, in this case the name of a specialist for the solution is noted.

Within an active workflow: Such a call will be regarded as “assigned individually”, except that the order of the processors is previously determined and cannot be changed afterwards.

Resolved: If a problem is solved the status changes into “resolved”. The requester should simultaneously get information about the result.

Closed: The work regarding the solution is carried out and the call can be closed.

During the working process calls can run different status. Every single call can be changed into another status. The access-control guarantees that only those members who dispose over the corresponding rights can change the status of a call.

4.1 Assuming responsibility

All incoming calls are instantly available for the Hotline (Level 1). After evaluating the calls members of the Hotline decide to assume responsibility for new calls or to assign them to the Second-Level-Support.

As soon as a new document changes its status (e.g. transition from “new call” into “in progress”) the person who is dealing with it has to decide to take responsibility. In case of conforming the person gets automatically the entire competence for this call.

The idea is that members of the Hotline work on the solution process as autonomous as possibly. If a member of the Hotline is in charge to solve a problem instantly (by searching in determined Knowledge bases) he takes responsibility for the call. The actual status will then be announced.

In contrast, when a problem is too complex and the solution requires special Know-how it can be assigned to specialists on the Second-Level-Support.

In order to assign a call to a specialist, click on the button “Change status” within the call form. The following dialog box appears:

Illustration: Dialog box to change status

Then select the corresponding option (e.g. Name/Person) and confirm with OK. The call now will be assigned to the selected specialist.

A new call can run the following states:

- new
- work in progress
- assign to group
- assign individually
- resolved
- closed
- start predefined WORKFLOW
- start 'ad-hoc' WORKFLOW

The option to start a predefined workflow requires predefined workflows to be specified within the global configuration, otherwise this option will not be available.

The possibility to start a workflow 'ad-hoc' only is available to users disposing of the corresponding access rights (see also workflow)

4.2 Completing new calls

New calls can simply consist of an e-mail including the sender's name as well as a brief description of the problem.

In such cases members of the Hotline have to complete these calls by adding further information like name of the company (if apparent), the priority and the way of transmitting a notification (via e-mail, fax, telephone or letter). See also description: "Registration by the Hotline".

4.3 Classification of problems

In order to classify a problem, Helpdesk staff members use a hierarchical scheme of categories that enables a simple categorisation of problems.

For classifying a problem select a category from the first level. Automatically the other levels – if existing – show the different subcategories

This guarantees on the one hand that the problem will be classified as accurate as possible. And on the other hand, a specialist (person) will be determined who has the necessary Know-how to solve this particular problem.

Every case type has one or more specialists assigned. To each case type automatically one or more persons are presented in the dialog box.

The following screenshot shows an example:

Illustration: Classification of calls

It is also possible to automatically show this assignment during the process of generating a document for solution. However, this requires a special configuration.

4.4 Classification of problems via flat list

In addition to selecting categories hierarchically (case type), the relevant categories can also be selected by hand from a flat list and full text search. The corresponding settings can be done within the personal configuration document.

4.5 Research in other databases

In order to find a solution for a problem, researches may have to be done. Helpdesk staff members can therefore search for information or solutions in connected databases (so called knowledge bases). This requires a special configuration.

First activate the section *Knowledge base* within the call form. Now you have three options of how to seek information regarding the current call.

4.5.1 Displaying documents in other Notes-databases

In order to solve problems it can be useful to search for solutions in other databases. Therefore Helpdesk staff members can automatically switch from GeoCom® Helpdesk to other connected external Notes-databases, resp. knowledge databases. This requires a special configuration (see also global configuration “connect external Notes-databases“).

First select a corresponding database from the pull-down menu within the field knowledge base then click the button “Search” in order to search for relevant information.

Illustration: Section Knowledge base

Automatically you will switch to the previously selected database. You can now search for solutions or information regarding the call.

The information can be transferred via cut and paste into the call form. Close the knowledge base and switch back to GeoCom® Helpdesk. Now you can fill the information from the knowledge base into the field “Solution”.

4.5.2 Searching in connected databases without leaving GeoCom® Helpdesk

Aside the possibility to change into other connected Notes databases you can also seek solutions without exiting GeoCom® Helpdesk.

To do so, first select a corresponding Notes-database from the pull-down menu within the field knowledge base, just as previously described. Then switch to the next field and fill in your search query. Finally click the search button located besides the query field.

Illustration: Seeking information from within GeoCom® Helpdesk

If documents corresponding to your query have been found, they will be displayed as result list in the bottom line. Via the arrow icons you can view the list.

Select a document from the list. Now you can either use the button “Open document” in order to open the selected document and, if applicable, adopt information via copy and paste.

Or you can use the button “Adopt data” to directly adopt data from the document according to the configuration of this knowledge base.

4.5.3 Searching within the database GeoCom® Helpdesk

Finally it is possible to seek information in the database GeoCom® Helpdesk itself. To do so, select the database named knowledge base from the field knowledge database and click the search button. A dialog box opens that displays all calls that are registered within the Helpdesk-database.

Illustration: Knowledge base (all Helpdesk calls)

Now enter your search query. A dialog box for quick search opens automatically. If the search term is registered within the database it will be displayed. Additionally it is possible to use the scroll bar in order to search for entries alphabetically. Select the corresponding entry so it is highlighted and confirm with OK. The entry will be displayed to the corresponding fields.

4.5.4 Displaying search queries (query history)

In order to display search queries click on the pull-down-button within the search query field.

You'll get a dialog box that displays the query history.

Illustration: Dialog box displaying query history

Select a document from the list and confirm with OK.

In order to remove an entry from the list, first click on the corresponding document so that it is highlighted and click on the button "Remove Entry". The entry will be removed from the list.

4.6 Creating documents for solution

The generation of solution documents can be configured for determined databases. After entering the final solution into the field solution click the button "Solution document". Now all necessary information will be reproduced automatically. Then provide the new document with additional information and save it to the database.

4.7 Creating work logs

Work logs serve for different purposes, such as for proof of activity (e.g. for an exact calculation of costs and assignment to clients) or simply as documentation of the work carried out on each call.

Work logs will – if configured – automatically be generated while saving a call to the database. Further, you can generate a new work log without simultaneously saving a new document.

To do so click on the button "Worklog".

You'll see the following dialog box:

Illustration: Dialog box for a new work log entry

Fill out the report including the name, a brief description of the task and the time needed to complete the work. The time since opening the call form is pre-selected as the working time. Thus, this pre-selection can be changed individually. Finally confirm with OK.

4.8 Displaying work logs

To display work logs click on the button “Displayork log” within the call form. Thus a report containing all work logs will be created for faster overview.

Illustration: Work log

4.9 Modifying work logs

Work logs can be modified even though they are just saved to the database.

To modify a work log click on the pull-down-button within the field work log and select the corresponding entry from the list.

Then select from menu bar:

Action – Helpdesk – Modify work log

Illustration: Modify work log

After modifying the work log confirm with OK.

4.10 Delegation of tasks to specialists or faculties

Problems that cannot be solved by the Hotline have to be delegated to persons or groups of specialists working in determined faculties. The corresponding specialist or faculty can easily be determined through classification of the problem.

By activating the button “Change status” within the form you’ll change the status. Then either select “assign individually” and a single person or select "assign to group” and a group of specialists.

Illustration: Dialog box change status, browser interface

4.11 Workflow

A ‘workflow’ in this context denotes a predefined order of processors for a call. Instead of assigning a call to a person or to a group it can be put into a workflow.

There are two kinds of workflows:

- predefined workflow: Such a workflow has to be defined by the administrator within the global configuration document and can afterwards be used by every Helpdesk staff member instead of a normal assignment.
- ‘ad hoc’ workflow: In case a user disposes of the corresponding rights, he can specify the processing order of a call on starting a workflow.

Illustration: Start predefined workflow, browser interface

In both cases the call is afterwards within the selected workflow and can only be processed by the corresponding Helpdesk staff members in the corresponding order. Processors have only two options to change the status of a call while in an active workflow. Either they can forward the call to the next editor in the list or they can reverse it to the previous processor. Only if the processing order has been completed the call can be closed (or changed to an arbitrary other status).

Illustration: Change of status while within an active workflow, Notes client

An active workflow can only be interrupted by a user disposing of the corresponding rights (i.e. Supervisor rights).

4.12 Notification

As soon as the work has been carried out, the requester gets a notification the way that is noted in the registration document. Usually a solution or notification of the process will be transmitted via letter/fax or e-mail.

Yet, should the notification be transmitted via telephone, the staff members count with the support of TAPI. With this integrated system all members are able to generate telephone lines automatically without abandoning the application.

Illustration: Section Return info, telephone, Notes client

Should the notification be transmitted to the requester via e-mail a message can be sent via Notes-Mail instantly from the application.

Illustration: Section Return info, e-mail, browser interface

Each view holds a button for sending notifications via e-mail. On clicking the button a form will open, which already holds the recipient's e-mail address. The subject is adopted from the original call. Click the send button to send the notification.

☛ **INFO:** Notifications resp. Solutions will be saved to each call. This ensures that all members have access to solutions and notifications. Relevant information will not remain in personal mailboxes of hotline members. Aside it is possible to save further trouble tickets of the requester to the original call.

Every specific Call-ID will automatically be adopted into the field "reference" within the solution document

In case of reference to a call the solution document will be adopted as notification. Hereby the sender's address is customer specific configurable.

Illustration: Call and solution within one view, Notes client

4.13 Closing a call

The work is carried out and a solution is transmitted to the requester. The working process can be closed now.

For closing a call click on the button "Change status" and select the option 'closed'.

Illustration: Dialog box change status, Notes client

Additionally, it's possible to select a final status from a list and assign it to a specific call.

Calls already closed can be re-activated as long as they are available in the database and not transferred into the archive yet.

4.14 Displaying calls as report

A call (requester's document) can be displayed as report. This is especially interesting for the delegation and forwarding process by e-mail. Aside from information it is also possible to attach work logs.

In order to display a call as report, first select and open (double click) the corresponding call.

Then select from menu bar:

Action – Helpdesk – Show call as report

You'll get a dialog box. Check now details that the report should include. The following options are available:

- Header
- Short problem description
- Detailed problem information
- Solution
- Work log

Illustration: Dialog box show call as report

After selection confirm with OK. You'll get a report including the previously selected details.

Illustration: Call as report

5 Views

GeoCom Helpdesk provides different views for “normal“ users (requesters) and Helpdesk staff members (hotline, specialists). The different views will now be described.

If not specified otherwise, all views are available within the Notes client as well as via browser interface.

5.1 Views for "normal" users (requesters)

“Normal users” in this context include all persons who reported a problem to the Helpdesk, i.e. from the hotline’s/Helpdesk’s point of view are regarded ‘customers’.

Customers generally are those employees disposing of LAN access to the Helpdesk database. These users only have restricted access to the database. They can only generate a new call (in case of trouble), revise their own calls and they are able to pursue the actual status of their calls.

Illustration: View for normal users, Notes client

All self-created calls remain in status ‘new’ until the hotline starts processing the call. In this status (‘new’) subsequent changes and additions to the call can be made. Once the hotline has started processing the call, the problem description as well as the solution (once provided) can only be read.

5.2 Views for Helpdesk staff members

Helpdesk staff members dispose of further access rights than normal users and thus have extended views. After opening the database, the Helpdesk menu provides you with the views “1. Calls – open”, “2. Calls – in progress”, “3. Calls – all” and “Other”.

5.2.1 Calls – open

The view **1. Calls – open** shows all calls that are not yet being processed, as well as assigned and processed calls, divided into three sub views:

a. new
b. new + assigned
c. new + in progress

New calls which have not been converted yet are shown by a reading symbol within this view. Converted calls, which have not yet been taken in progress will be shown by the symbol of a closed envelope ( ).

Assigned calls are shown by the symbol of a person ( ). Thus you cannot only see which calls have newly reached the Helpdesk, but also which calls have been personally assigned.

By double clicking an entry the call can be opened for reading and, after conversion, being edited.

Illustration: View Calls – open

5.2.2 Calls – in progress

The view **Calls - in progress** with its four sub views provides details to different parameters. This view contains all calls that are in progress through Helpdesk staff members (new calls are not listed). The view shows calls that are resolved ( ), assigned ( ) or which are in progress ( ). Double click on an entry in order to change the status.

The main view consists of the following sub views:

a. by requester

b. by editor
c. by status
d. by category
e. by workflow

Illustration: View Calls – in progress, browser interface

Example:

Selecting the sub-view *c. by status* you'll get a complete listing of all calls that are in progress as well as calls that are assigned to specialists (individually or groups) on the Second-Level-Support.

Every call will be listed with the corresponding ID-number, date of its generation and name of the requester. Besides this the name of the Helpdesk member currently working on a call as well as a brief description of the problem is retrievable.

5.2.3 Calls – all

Similar to the views described before, the view **3. Calls - all** also conveys five sub views. By this option you'll get a complete structured overview of all calls (new calls, calls in progress, assigned calls, closed and resolved calls).

Helpdesk staff members who are authorised to intervene the process can call up every call at any time.

The main view consists of the following sub views:

a. by requester (alphabetical order)
b. by editor (names of all Helpdesk staff members including calls in progress, individually assigned calls, resolved and closed calls)
c. by status (number of calls in progress, assigned to a person or group, resolved and closed calls)
d. by property (number of calls according to previously defined properties)
e. by category (number of calls according to previously defined

categories, e.g. Hardware, Software, etc.)

Illustration: View Calls - all c. by status, Notes client

5.2.4 Other

The view **Other** provides four sub views, which – according to database access – are displayed within the navigator.

Normally, members of the Helpdesk have access to the views “Categories“ and “Standard solutions“

Only in case of corresponding access rights the views “Alarm profiles“ and/or “Task planning“ are visible.

The folders “Replication conflicts“ and “Lost documents“, which can be accessed from the view collection “Other“ as well, are likewise visible only if certain access rights are provided.

5.2.4.1 Categories

New calls can be classified to corresponding categories while recording. This makes it possible to range a problem and to simultaneously identify a specialist on the Second-Level-Support.

Therefore the view Categories contains different categories to that calls can be classified like calls to Hard- and Software, respectively. Authorised persons can extend or modify categories according to the needs of each customer (company).

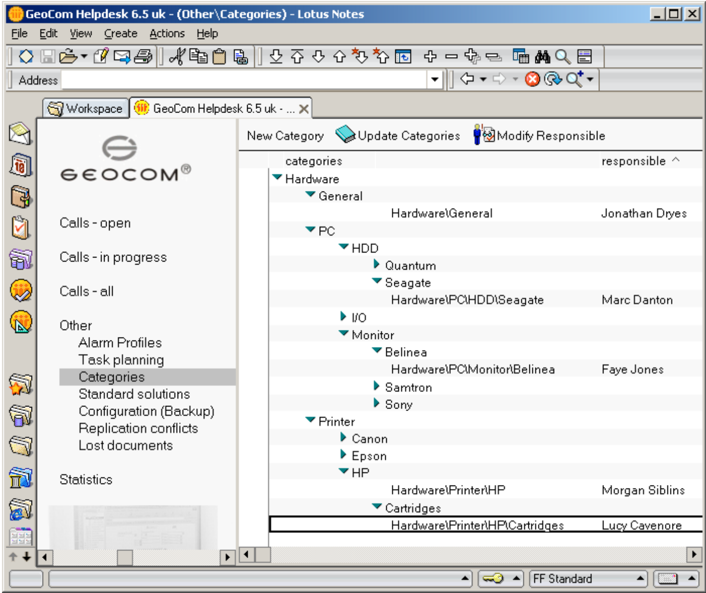

Illustration: View Other – Categories, Notes client

5.2.4.2 Defining categories

To create a new category first select the view “Helpdesk – Other/Categories”.

☛ **INFO:** The definition of new categories requires appropriate access rights.

To generate new categories click on the button “New Category” within the action bar. Into the form “Category” you can enter the different levels to which the problems belong.

Illustration: Form for new category, Notes client

First enter the main category into the field Level 1, e.g. Hardware. Then specify on the second Level another category, e.g. Printer.

Altogether four level can be used for a classification of a problem.

Using the menu “Responsible” you can open the Notes Address book in order to select the responsible specialist. A responsible person can also be manually entered into the document form.

Finally save the document using the button “Save” within the action bar.

Click on the button “Save and next” to simultaneously store the document to the database and open a new form to define another category.

To close the view finally click on the button “Close”.

To update the category list click on the button “Update Categories” within the action bar.

5.2.4.3 Standard solutions

Already solved problems can be defined and saved to the database as standard solutions. This is especially useful in those cases when the Helpdesk often deal with the same or a similar problem. With solution documents, that were defined as standard solutions, members of the Hotline can quickly solve often occurring problems.

The view “Other/Standard solutions” shows all documents with standard solutions. The list can be extended and modified by authorised persons.

In order to use data from a standard solution, activate the section “Standard solution” within the extended call form, select the corresponding entry and adopt the data into the call form by clicking the adoption button.

Illustration: Section Standard solution, Notes client

Standard solutions can also be used to quick-close calls, which do not need any further editing (e.g. SPAM or stray e-mails).

For this purpose you have to define a standard solution (see next section) and mark the field ‘Status: closed’ for adoption. Now mark the SPAM or stray mail within a corresponding view and click the button “Quick close calls”. A list including all standard solutions with the field ‘Status: closed’ checked will appear. Select the corresponding one (e.g. SPAM) and click OK. The call will automatically be closed with a corresponding comment.

5.2.4.4 Defining standard solutions

Having filled in a text for the trouble shooting to the field “Solution” within the Call form, the document can be used to create a new standard solution. To do so, use the following action from menu bar:

Actions – Helpdesk – Create standard solution

Fields that should be adopted into the call when using this standard solution have to be checkmarked. Data adopted to the fields “Details” or “Solution” will automatically be appended to the existing content.

New standard solutions can also be created from the view “Other – Standard solutions” by using the corresponding button.

Illustration: Create standard solution

Standard solutions can also be adopted into the list of knowledge bases from the configuration document (button Default).

5.2.4.5 Release standard solutions

Standard solutions cannot be viewed by every user. By default only Helpdesk staff members can access standard solutions.

To enable access for standard users, the solution documents have to be released. To release a standard solution activate the field “User access” within the solution document.

Illustration: Field “User access”

All users disposing of the role [ReadSolutions] can now view these standard solution documents.

5.2.4.6 Alarm profiles

Alarm profiles help to supervise the time management during troubleshooting. Every single alarm profile consists of one or more specific alarm definitions, that test one single condition each. Such conditions could be e.g. time overrun (delay) or the first emerge of a specific occurrence within working process.

Aside, alarm profiles can also be used for different treatments according to different customers.

All definitions of an alarm profile have the same description. Requests (Calls) can be connected with any alarm profile. An agent on a server runs two times an hour in order to test all alarm definitions and/or to trigger a specific action. This agent will be started from the global configuration document.

As a result of this supervising process the agent sends a notification or generates a calendar alarm with predefined information each.

Every action (alarm) will only be carried out once. Calls that have a future re-submission date will not be considered until then (if not stated otherwise within configuration of the alarm profile).

If a group manager should be informed after 4 hours and the head of department after 24 hours, it is necessary to set alarm definitions for each activity.

The sub-view “Alarm profiles” shows an overview of all defined and distributed alarm profiles. This view only will be displayed if the role “Supervisor” was previously checkmarked within the access control list.

The view also contains information to the status, to the specific action as well as to the trigger (e.g. status not changed for XX hours).

Using the view “Other – Alarm profiles” you’ll get a listing of all existing alarm profiles.

Illustration: View Other - Alarm profiles, browser interface

5.2.4.7 Defining alarm profiles

To define a new alarm profile first open the view “Other – Alarm Profiles”. After opening this view click the button “New Alarm Profile”.

Enter all relevant information into this form. With the alarm function you can e.g. check how far a task has progressed or if a call has been processed at all.

Illustration: Form for creating an alarm profile

For further information on creating and maintaining alarm profiles please refer to the *Manual for Administrators* for GeoCom® Helpdesk.

5.2.4.8 Task planning

By using tasks, several conditions can be time-controlled and checked and if necessary corresponding actions can be performed, just alike to alarm profiles for calls.

In contrast to alarm profiles, which are always bound to a specific call, task profiles can be defined and executed independently of any calls and even independently of the application itself.

Thus, by using the task management, especially recurring tasks can be easily monitored, e.g. a weekly data backup or the reminder of a system report that is due on the third weekday each month.

Upon fulfilment of the corresponding condition nearly any action can be performed by a task profile by simply starting an agent that performs the desired action(s).

Users disposing of the role [ViewTask-uk] resp. [ViewTask-de] can access the view “Other – Task planning“. This view shows all currently existing task documents.

Illustration: View Other – Task planning, Notes client

5.2.4.9 Create new task

To define a new task profile first switch to view “Other – Task planning“.

The button “New Task“ opens the following form:

Illustration: Form New Task, Notes client

Enter all relevant data into this form.

For further information on creating and maintaining task profiles please refer to the *Manual for Administrators* for GeoCom® Helpdesk.

5.2.4.10 Replication conflicts

From this view all conflict documents can be accessed and compared to the corresponding main document.

For further information on replication conflicts please consult the *Manual for Administrators* for GeoCom® Helpdesk.

5.2.4.11 Lost documents

This folder shows all documents that do not have a corresponding parent document and thus will not be shown in standard views.

For further information on creating task profiles please consult the *Manual for Administrators* for GeoCom® Helpdesk.

5.2.4.12 Configuration (Backup)

In this folder copies of previous configuration documents will be shown. Each time upon saving the global configuration document, a backup copy is made and stored into this folder.

For further information on configuration backups please consult the *Manual for Administrators* for GeoCom® Helpdesk.

5.3 Groups of actions within views

Actions will be assorted to the groups “Helpdesk”, “Admin” and “Supervisor”.

5.3.1 Helpdesk

For Helpdesk staff members the following actions are available:

- Personal Configuration
- Prepare Alarm
- Dial Phone Number
- Selected Documents: Modify Status
- Logbook Alarm
- Logbook Status

Illustration: View “Helpdesk“ within menu “Actions“

5.3.2 Admin

For administrators the following actions are available:

- Configuration
- Configuration Workflow
- Statistic Report
- Access rights

Illustration: View “Admin“ within menu “Actions“

5.3.3 Supervisor

For supervisors the following actions are available:

- Convert New Mails
- Modify Call ID
- Selected Documents: Modify Common Fields
- Selected Documents: Update
- Modify Categories in Calls
- Move to archive by year

Illustration: View “Supervisor“ within menu “Actions“

6 Resubmission

In the course of completion of a new call a date for re-submission can be assigned. This allows to control the future job processing.

6.1 Setting resubmission date

Within the call form the calendar function can be used to set a date for resubmission. This can, of course, also be made in case of delegating a call to other employees.

The priority of this process can be selected from “normal“ and “high”, and a time for resubmission can be specified. Click the clock button and select the desired time.

To adopt the selected time into the call form, click the confirmation button. Calls which have been provided with a resubmission date will be displayed including the resubmission date and time marked by a clock symbol within views 1 to 3. In case priority for this call was set to “high”, additionally a red exclamation mark will be shown.

All views contain a frame at the bottom of the screen showing all entries which are currently in your resubmission.

Illustration: Frames for personal resubmission

7 Statistics

With GeoCom® Helpdesk it is possible to generate Statistic Reports. This makes it possible to precisely analyse and evaluate all calls including the solving process.

The view "Statistic" is only available for members who have the necessary access rights.

7.1 Views (statistics)

By the option “Statistics” Helpdesk staff members get an overview of all calls separately to the following views:

a. call open time
b. work time
c. requester
d. company
e. editor
f. call type
g. category

The view **"call open time"** displays all calls according to year, months, request from, start work, end work, count and work time (h). The listing of call open time makes it possible to analyse how long a solution process takes. Aside you’ll get precise information about the entire solution process.

Illustration: View Statistics a. call open time, browser interface

The view **"work time"** displays – on the average - the time spent for solving a problem.

Using the view **"requester"** it is possible to visualise those persons who have sent a call to the Helpdesk in the past. Helpdesk staff members get information according to the number of calls sent by a person (year and month) and an abstract about the status. Additionally the reaction time and call open time (hours) will be displayed.

Similar to this the view **"company"** displays customers who have sent a call to the Helpdesk in the past.

Likewise this view displays information according to the number of calls sent by a customer (year and month) and an abstract about the status. Aside the reaction time and call open time (hours) will be displayed.

The view **"editor"** displays all Helpdesk members (persons) who edit calls resp. have worked on the solution of problems. The information is subdivided according to year, month, and day.

The view **"call type"** gives an overview of the way the Helpdesk usually is contacted. For this, the view displays the calls according to year and month. Aside the call type, e.g. number of phone calls, e-mails, the status, and a problem description will be displayed.

And finally the view **"category"** provides you with calls sorted by categories.

7.2 Creating statistic reports

Using the action “Statistic report“ it is possible to visualise different statistic reports. To create a statistic report first select from the menu:

Actions – Admin – Statistic Report

You’ll get the following dialog box:

Illustration: Dialog box to choose a report type

Select the “Report type“ (e.g. list of requester, companies, editor), then select the “date range“ (e.g. by day, month, quarters and year).

Additionally it is possible to compare it to the past month, quarter or year and include these information into the report.

The “status“ of a call can also be selected (e.g. in progress etc.).

The field “display calls“ causes – if activated – details according to the calls being displayed within the statistic report.

Finally, you can define the “minimum number of calls“ to determine the minimum number of occurrences an entry has to have to be included into the statistic report.

Confirm with the button OK to generate a new statistic report.

Illustration: Statistic Report

8 Alarms

Helpdesk staff members (First- and Second-Level) can work with personal alarms. In order not to forget a request within daily work, to each call an alarm can be assigned, which is displayed within the personal Notes calendar. Alarm entries can be generated individually or for other Helpdesk-members.

8.1 Adding alarm entries to calendar

To set a personal alarm, first select the call to that a new alarm should be assigned. Then checkmark the entry within any view and select from menu:

Actions - Helpdesk – Prepare Alarm

You'll get the following dialog box:

Illustration: New Alarm Entry to Calendar

The text field of the dialog box displays the problem description of the call checkmarked before. Aside the Call ID and the requester's name will be adopted to this field. However, it is possible to enter other textual information.

Then select a date for the alarm via the Notes calendar and set the time for reminding. Confirm with the button OK. The alarm entry will be added to the personal calendar.

The alarm will be displayed as pop-up-window on the screen.

Illustration: Pop-up-window Alarm

Using the button "Close" will close the alarm. Should the alarm drowse enter the time range in minutes, e.g. 10 into the window beneath and click on the corresponding button.

8.2 Deleting alarm entries from calendar

To delete an alarm entry from the calendar, first open your personal calendar. Select the alarm entry so that it is highlighted by a black frame. Then press the Del key, followed by F9.

A dialog box will appear asking whether you want to delete this entry from your calendar. Confirm the dialog with OK and the alarm entry will be removed.

☛ **INFO:** Alarms will only be shown within the personal calendar if the call has been provided with the information about date and time and then has been saved.

9 Personal configuration

The user interface can be configured according to personal resp. Individual needs. To set settings within the personal configuration document select from menu bar:

Actions – Helpdesk – Personal Configuration

The personal configuration document will open.

Alternatively, you can use the option "Preferences" from the navigator within the web browser interface to open the personal configuration.

The different configuration parameters will be grouped into the following sections for more clarity:

- Common settings
- Application start settings
- New call settings
- Edit call settings

After you have configured your personal settings click the button “Save & close” within the action bar.

9.1 Common settings

Illustration: Section “Common settings”, Notes client

Within this section you can specify whether you want to use the German or English user interface.

9.2 Application start settings

Illustration: Section “Application start settings“, Notes client

Use the option “Tickler auto display if entries within the next NN days“ to set the time range for displaying documents with resubmission date at application start. Aside current documents with resubmission date also future entries – if available – will be displayed.

9.3 New call settings

Illustration: Section “New call settings", browser interface

9.3.1 Default status for new calls

Hereby you can select between “new“ and “work in progress“. Select “new“, if you preponderant only record new calls. If you generally work instantaneous on new calls, select “work in progress“.

9.3.2 Select requester automatically for new calls

By the activation of this field, while recording a new call, automatically a list with all requesters will be displayed, in order to select a corresponding entry from the list.

9.3.3 Display open calls automatically

This option serves to configure the automatic display of open calls. Altogether four options are available: “No“, “Requester“, “Company“, and “Requester and Company“.

As default for the usage as customer support system the option “Requester and Company“ is recommended. For exclusively in-house-support (support for own employees) usually the option “company“ is used for the corresponding department. In this case the display of all open “problems of the departments“ leads to a huge number of open calls. To avoid this the option “Requester“ should be selected.

9.3.4 Show call history

With this option you can set the time range for displaying historical documents at application start.

To display documents of one year, e.g., fill into the field 365.

9.3.5 Input form style

Here you can select, which section of the call form should be viewed on opening the call form: Classification, standard solutions or knowledge base. This selection does not impact the availability of the sections! Sections can be switched anytime by clicking the corresponding button.

9.4 Edit call settings

Illustration: Section “Edit call settings“, Notes client

9.4.1 Button "Save & close"

Use the checkbox to set if the button “Save and Close“ should be used within the call form. It allows to save and close a recorded new call simultaneously, without renewed confirmation. If this field is checkmarked the button “Save“ will not be shown within the action bar.

9.4.2 Logbook entry on save

The activation of this field guarantees that a new work log will be requested if a call is saved. If this field remains empty, the automatic request is suppressed.

9.4.3 Default knowledge base

For this you can choose between a default solution or knowledge base which is selected automatically while recording a new call.

9.4.4 Send notification after assigning call to a person

These field serves to set if notifications should be used while assigning calls to persons. Click on the corresponding fields to select either if you do not want to send a notification to the person, to whom a call was assigned, send a notification after confirmation or send notification automatically without confirmation.

9.4.5 Send notification after assigning call to a group

This field serves likewise to set whether notifications should be used. The configuration is similar to the configuration described above.

9.4.6 Button "Phone"

Use this checkbox to define whether an additional button should be at your disposal within the action bar. Using this button you'll open a dialog box, to that you can adopt existing entries or to fill in telephone numbers.

Internally the standard Windows TAPI is used.

9.4.7 Use personal alarm

These fields serve to set, whether personal alarms should be used. Click on the corresponding fields to select, either if you do not want to use personal alarms, use alarms only with confirmation or automatically add alarm entries to your personal mail database.

9.4.8 Name of mail database for personal alarms

Personal alarms will be inserted your personal mail database.

Usually a mail database will be identified from the currently active environment. If the database defined there should not be used for alarm entries, it is possible to select another database. Hereby it is necessary to enter the entire file path of the database (e.g. mail\msmith.nsf). The system where the currently used Helpdesk application runs will be used as server.

9.4.9 Assigning problem categories

Here you can set type of dialogue for assignment of problem categories, it means whether categories should hierarchically be selected or a flat list should be used.

9.5 Other Actions

There are the following actions available from the actions menu:

- Use settings for new users

9.5.1 Use settings for new users

Use this action to overwrite your current personal settings with the predefined settings for new users.

9.6 Policy for personal configuration

The system administrator of GeoCom® Helpdesk can define a global policy for the personal configuration.

With this policy, certain parameters of the personal configuration are globally defined and cannot be changed by the user.

In case you try to change parameters from the global policy restrictions, you will see a notification on saving the document, which informs you about invalid changes and resets these values to the policy.

Illustration: Correction of the personal configuration by policy