Lotus Domino® Application

GeoCom®
Helpdesk

Version 7.0 – January 2008

Update 7.0 Build 756c

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1 Introduction

This documentation describes changes and enhancements of GeocCom® Helpdesk 7.0 build 756 to the previous version 6.5.

1.1 System requirements

The following server applications are supported by GeoCom® Helpdesk:

Domino 6.5

Domino 7.0

The following applications can be used as client software:

Notes Client 6.5

Notes Client 7.0

Notes Client 8.0

Firefox 2.0

Internet Explorer 6

Internet Explorer 7

1.2 License key

For the update GeoCom® Helpdesk version 7.0 build 756, a new license key is required.

2 Supporting SSL

With version 7.0 build 756, GeoCom® Helpdesk supports usage of secure socket layer (SSL) to protect your login data when accessing the database via the web browser interface.

The user can request SSL encryption for his login by manually altering the browser link (or the bookmark) to secure http. I.e. within the URL line of the browser, the user exchanges the protocol **http://** with **https://**.

As an alternative, usage of SSL can be globally specified for the whole application. To do so, a user with "Manager" access to the database must open the database properties (by right clicking the database icon and selecting "Database – Properties"). Within the section "Web Access" the option "Require SSL connection" must be activated.

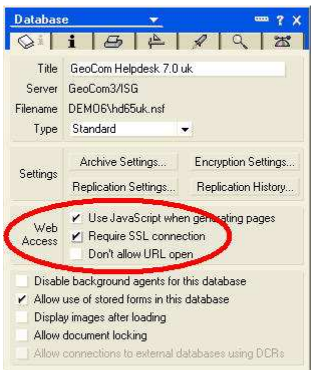


Illustration: Database properties – SSL connection

☛ **Note:** Login encryption via SSL can only be performed when a corresponding certificate has been installed to the Notes server. Otherwise, login attempts using SSL will only show a blank page.

3 Performance enhancements

The overall performance of the application in general and of the web browser interface have been significantly improved. Particularly, DSL connections with 2 Mbit downstream or more can now be used with a Notes client.

3.1 Performance for page display within web browser improved

Due to internal changes to the handling of HTML templates and usage of profile documents to store selection lists, the performance for page display within the web browser interface has been improved by factor four approximately.

3.2 Updating folders "Lost documents" and "Replication conflicts" has been sped up

The functions for updating the folders "Lost documents" and "Replication conflicts" have been revised. Updating these folders will now take significantly less time.

3.3 Cache for list of standard solutions and alarm profiles

Two separate cache lists have been implemented which hold the list of available standard solutions resp. alarm profiles.

This results in a faster display of forms while using the browser interface. Now only those standard solutions resp. alarm profiles, which are actually used within the document, have to be read. So far, the complete views "Standard solutions" and "Alarm profiles" had to be read in order to display a call form.

The corresponding cache will always be updated when a standard solution resp. an alarm profile document is saved, regardless whether it was an already existing or a completely new document. Saving the global configuration document will also update the cache, as well as marking standard solutions or alarm profiles for deletion.

However, the cache will **not** be updated when you insert a standard solution resp. an alarm profile via copy & paste from another database (or create a copy within the same database). In this case the copied document must be opened for editing, saved and closed again to update the cache.

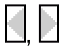
4 Integration into web portals

With the update 7.0 the browser interface of GeoCom® Helpdesk disposes of several options to integrate the appliaction into web portals (e.g. intranet portals) via iframe.

4.1 Relative size of forms and windows

Forms and windows of the browser interface have been designed to adapt to the individual size of an iframe window. The smallest recommended window size is 600x400 pixels.

4.2 Hidable navigator



The view navigator of the application can be hidden (and shown) using corresponding buttons. This can save window space at times when no navigation is needed.

The selected setting will be saved to a session cookie and will be restored upon another login of the respective user.

The initial setting of the view navigator can also be specified via the URL. Use

http://www.YourDomain/helpdesk.nsf?Open&Portal=0

to open the application with the navigator **shown** and

http://www.YourDomain/helpdesk.nsf?Open&Portal=1

to open it with the navigator **hidden**.

If no cookie is available (e.g. if a new user logs in for the first time) and no "portal URL" is used, a global configuration entry will determine whether or not the navigator will be shown upon startup (see also 11.5, View navigator).

4.3 Condensable call form

A condensed version of the Helpdesk call form is available which only shows one info segment (instead of the usual three). Info fields shown are "Requester", "Company", "Status" and "Work logbook".

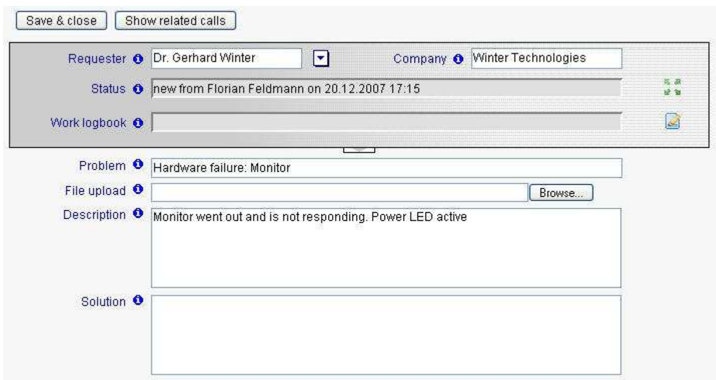


Illustration: Condensed call form, browser interface

The arrow button located centrally below the (last) info segment can be used to expand and condense the call form. Double clicking into the area above the first info segment (to the right of the menu buttons) will also switch between condensed and expanded call form.

☛ **Note:** The condensed call form is also available to users accessing the database via a Notes client.

5 Views

All views containing calls have been revised to achieve better readability. Further information is made directly accessible.

5.1 Full text search within browser limited to 250 results

The option to search the selected view using a full text search can also be used from the browser interface (given that the database is full text indexed).

When accessing the database via the browser interface, full text search is limited to 250 results. Using the Notes client an arbitrary number of results can be shown.

5.2 Display "within workflow"

A column "within workflow" has been added to all views containing calls. This column shows whether a call is currently part of a workflow (ad-hoc or predefined).

If this is the case, a corresponding "within workflow" symbol will be shown within the column. The column will remain empty for all calls that are not currently part of a workflow.

✒ **Note:** Calls which have been assigned to a workflow, but have not yet been accepted by the first editor of the workflow definition, do not yet count as "within workflow". Thus, for these calls the "within workflow" symbol will not yet be shown.

5.3 Action e-mail dump mail header

Helpdesk staff members now dispose of a new action to show e-mail header data.

Calls that have been sent to the application's mail-in interface will periodically be converted to call documents by the mail-in agent. To show the original header data of the incoming e-mail, select from menu:

Actions – Helpdesk – eMail: dump mail header

A dialog opens showing all relevant e-mail header data.

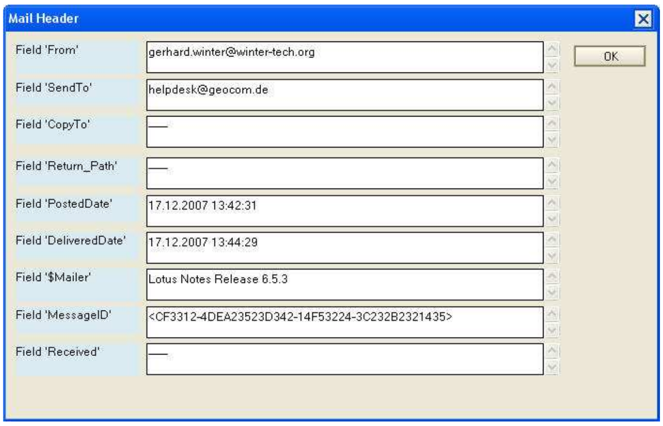


Illustration: Dialog Mail Header

5.4 Opening calls via the browser interface

There are two options to open calls via the browser interface:

1. **Opening a call via single mouse click:**
   Simply click the call within any view. The corresponding call will then be opended within the same window.
2. **Opening calls via double clicking:**
   When double clicking a call, it will be opened within a new window resp. a new browser tab. Thus, the selected view will still be available within the main window.

☛ **Note:** Whether a call is opened within a new window or a new browser tab can be specified within your local browser settings.

After processing the opened call, the button "Close" can be used to return to the previously opened view.

If the call had been opened within the same window (via single mouse click) the button "Close" will bring you back to the previously opened view. If the call had been opened via double click into a new window, the button "Close" will close the new window or browser tab.

6 Field "Info" in call form (browser interface)

When using the browser interface the field "Info" within the Helpdesk call form can be expanded by double clicking it. Extensive information wil thus be better readable.

Another double click will return the field to its normal size within the call form.

7 Standard solutions

Several changes and enhancements have been applied to the handling of standard solutions which will be explained in the following.

7.1 Adopting data from standard solutions

For each standard solution you can configure whether the relevant data should automatically be adopted into the target call.

Within the standard solutions form a field "Select if all checkmarked fields should be copied into the call without confirmation" can be used to specify this behaviour.

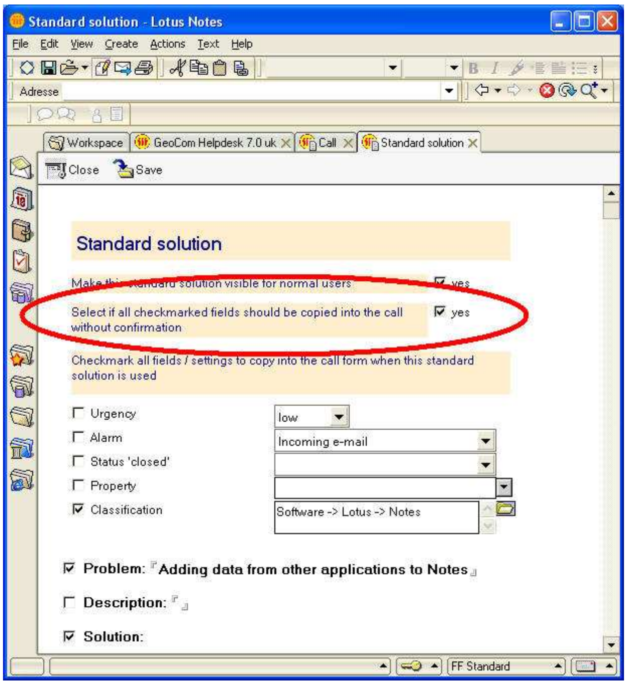


Illustration: Form standard solution, field automatic adoption of data

Depending on this setting, different behaviour will occur when applying a standard solution to a call:

If the field is **activated** (i.e. checked), clicking the button "Apply standard solution" will automatically adopt all fields that have been checkmarked within the standard solution document into the target call (this complies with the previous behaviour).

If the field is **not activated** (i.e. left unchecked), clicking the button "Apply standard solution" will open a dialog that can be used to select all fields that are to be adopted into the target call. Select all fields you want to adopt and click OK.

Contents of the fields "Priority", "Alarm", "Status closed" and "Problem" can be altered before adopting them into the target call, even when the standard solution proposes different field contents.

By default all fields that have been activated within the standard solution will be preselected.

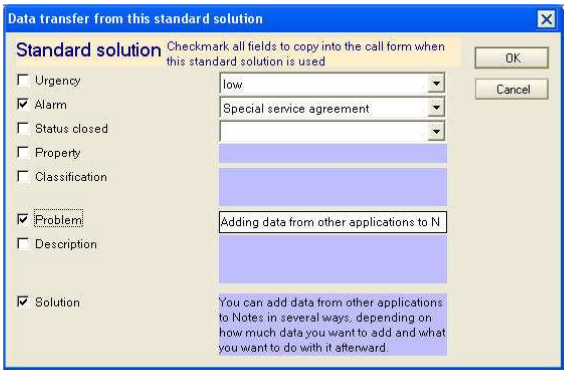


Illustration: Dialog Apply standard solution

7.2 Adoption of the field "Problem" from standard solution

When adopting the field "Problem" from a standard solution, the current field content will no longer be overwritten.

Instead, the adopted data will be added to the end of the existing data string and can thus provide additional information.

7.3 Applying standard solutions via the browser interface

Using the browser interface, data from standard solutions could only be adopted into the current call via copy & paste.

Now the action "Apply standard solution" can also be used from the browser interface.

Adoption of data using the browser interface is done in the same way as it is done with a Notes client: Depending on the configuration of the standard solution, the selected data will either be directly adopted or a dialog appears where the adopted data can be selected.

☛ **Note:** For calls that have arrived as e-mails, the fields "Problem" and "Description" cannot be edited at all (and thus not even by standard solutions). To do this kind of editing, you must dispose of "Supervisor" access rights at least.

7.4 Display of standard solutions

Using the browser interface, standard solutions can only be viewed but not edited (regardless of any access rights). Using a Notes client, standard solutions can be viewed and edited and new standard solutions can be created.

Via Notes client and browser alike, the view "4. Other – Standard solutions" shows a list of all availlable standard solutions.

When using a Notes client you can open a standard solution by double clicking it. The solution will then be displayed in a special read-only mode that shows the solution in the same way as it would be shown in later use (e.g. when opening it via the browser interface). Thus, the impact of changes on the layout of the solution document can be checked.

When double clicking the document from this special read mode, you will only be able to alter the contents of the standard solution, but not the corresponding options.

To open and edit a standard solution with all available options, select

the corresponding document within a view an select the "Edit" button.

The standard solution will be opened in full edit mode and you can alter all contents and options to your liking.

8 Warning for resubmission entry in the past

When a past date is selected within the field "Next action date", a corresponding error message will show upon saving the document. The action date is only checked within the Notes client.

Illustration: Dialog Action date check

9 Add files to calls via browser interface

When opening or creating a call using the browser interface the fields "Description" and "Solution" will not be interpreted as RTF fields (like they are within the Notes client). Thus, using the browser interface, you cannot add font formatting etc. to these fields. Neither can you add screenshots or other files directly to these fields.

If you want to add any files to a call using the browser interface you must use the field "File upload".

Illustration: Field for uploading files (browser interface)

Clicking the button "Browse" will open a file browser which you can use to search and select the corresponding file from your harddrive. The file will be uploaded to the server when you save the call.

☛ **Note:** If you want to add multiple files to a call, click the button "Edit call" after you have saved the document. The call will be set to edit mode again and you can add and upload another file. Repeat in the same way to add multiple files.

☛ **Note:** In case calls should be processed via Notes client and browser interface alike, you should also append files when using the Notes client (instead of importing them or simple inserting them via copy & paste).

Use the "Append" button from Notes' icon bar to add files to calls. Thus you can make sure that all relevant data will be available both when using the Notes client and the browser interface.

10 Attach personal signature to replies

Helpdesk staff members can define a signature for outgoing e-mails within their personal configuration document.

Within the section "Reply settings" you can select whether or not personal signatures should be added to outgoing e-mails.

The signature itself can be configured for both Notes client and browser interface: For usage within a Notes client, an RTF field can be filled with arbitrarily formatted text and/or screenshots. Within the browser only a plain text can be used.

✒**Note:** This personal signature will automatically be added to the text field of outgoing e-mails. The user can manually remove the signature from certain messages, if he wishes to.

✒**Note:** Personal signatures do **not** affect usage of the global disclaimer which can automatically be added to all outgoing messages. If a disclaimer and a personal signature are defined, both signatures will be added to outgoing e-mails. For further information regarding the global disclaimer please refer to the manual for administrators.

11 Global Configuration

The global configuration document has been extended by certain parameters which will be explained in the following.

11.1 Error logging

A new section "Error logging" has been added to the global configuration document. Here, a database of type *Agentlog* (derived from template alog4.ntf) has to be specified. All log and debug entries occurring at runtime will be stored to this database.

If no valid entry is specified, an error message will be shown upon saving the configuration document.

11.2 Display start time for worklog entries

The section "Worklog" has been extended by a parameter "Display start time". With this parameter you can switch between displaying only the date or date and specified time for worklog entries with start time setting.

This setting affects display of the worklog history within the call (both when using Notes client and browser interface) as well as display of all worklogs as worklog report (this option is only available for users of a Notes client).

11.3 Search result window size

The section "Connect external Notes-Databases" holds a new parameter "Search result window size (Notes Client)". Via this parameter the number of search results per result page can be specified.

This setting only applies to display within the Notes client, but not to the browser interface.

11.4 Alarm agent for immediate status modification

The section "Alarm" has been extended by a parameter "Immediate status modification check should run". With this parameter you can specify whether alarm profile checks with the setting "immediately after status change" should be performed in client or server context.

When "on Domino-Server" is selected (recommended) the check will be performed directly within Notes server context. This results in less computational work to be done by the client, which e.g. enables the call form to be closed faster (from a user point of view). Because the computational work lies completely with the server, a high utilization of the application (multiple Helpdesk staff members simultaneously process their calls) can exceed server capacities.

The setting "within Notes-Client" relieves the server, as the computation will be done by the client itself. Due to the additional computations, closing the call form will take a little more time (from a user's point of view) and the network traffic will be higher, as more data has to be exchanged between client and server.

11.5 View navigator

Within the section "Web-Interface Requester" the parameter "Window layout" has been added. With this parameter you can choose between the options "view navigator visible" and "view navigator collapsed for portal layout".

This setting will act as a default for users who have no session cookie stored on their machine (either because they log in for the first time, or because the session cookie has expired, see also 4.2, Hidable navigator).

11.6 Encryption

With the current update the application supports encryption of the solution field and (optionally) the encryption of outgoing messages. Within the section "Encryption" the option "Encryption support" has to be activated. A detailed description of encryption usage can be found within the manual for Helpdesk staff members.

12 Bugfixes

12.1 Bugfixes to previous version

12.1.1 Generation of Call-ID erroneous

Due to an error, each time a not yet converted e-mail was opened a new consecutive call-ID was created.

This error has been fixed.

12.1.2 Display of logbook entries limited to 100 characters

Each logbook entry can be up to 255 characters long. Due to a display error, only the first 100 characters were shown within the browser interface.

This error has been fixed.

12.1.3 Linefeeds in field "Info" ignored when using action "Create another call"

When the action "Create another call" was used to create a new call for an already known requester, linefeeds within the field "Info" were not correctly adopted.

This error has been fixed.

12.1.4 Cut-off descriptions within 'ad hoc' workflow

When creating an 'ad hoc' workflow using the browser interface the column descriptions were cut off.

This error has been fixed, the descriptions are now displayed properly.

12.1.5 Error in search in multiple external databases (Notes)

When searching in multiple external databases at once using the Notes client, display of documents always tried to search the results via UNID within the first database.

This error has been fixed. All search results from all searched databases will now be properly displayed.

12.1.6 Search in external databases always limited to 25 results (Web)

Due to an error, searching external databases via browser interface was always limited to 25 results instead of the configured value.

This error has been fixed. The size of the result window will now autmatically be adopted to the maximum number of results specified within the global configuration (or less, in case the search yielded less than the maximum number of results).

12.1.7 Windows and fields adopted to width of Notes standard font

Upon using the Notes standard fonts, several field contents and descriptions were cut-off due to a too small size of entry fields or text windows (e.g. the field "Next action date" within the Helpdesk call form).

All affected fields an windows have been accordingly resized.

12.1.8 Time synchronization problem with alarm profiles solved

For alarm profiles which should be checked in user context ("Checking this alarm condition: immediately after status modification") several alarms were not triggered when client server were not exactly synchronized.

This error has been fixed, all alarms are now triggered correctly.

12.2 Bugfixes for build 756b

12.2.1 Support for IE7

Due to several changes the application now holds support for Microsoft Internet Explorer 7 as a client application.

12.2.2 Browser interface to access external Domino databases and address books

Several improvements have been implemented for using external Domino databases or the global address book via the web browser interface. These include:

- Error handling in case of configuration and access problems
- JavaScript now cachable in local browser cache
- Limitation of full text search to a maximum of nn entries
- Usage of URL parameter reduced to minimum
- Search of type "starts with" now available for categorized views

12.2.3 Error handling in case of JavaScript missing or switched off using a browser

When a users has disabled JavaScript (or his browser is not capable of JavaScript), a meta-tag will be used to forward the user to an appropriate information page.

12.2.4 Sender configuration in alarm profiles and task management

The sender address for outgoing e-mails created by alarm profiles or tasks can now be set according to the recipient name and / or the message subject.

12.3 Bugfixes for build 756c

12.3.1 Selection of recently altered alarm profiles

Due to a cache error, recently altered alarm profiles could not be selected from within the call form.

This error has been fixed.