GEOCOM®

Lotus Domino® Application

GeoCom® Helpdesk 5.5

Build 174a

ISG Information Systems GeoCom GmbH
Kolkmannskamp 6
D-44879 Bochum
HRB County Court Bochum 4368

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

Content

1 Introduction

This manual describes extensions and modifications of GeoCom® Helpdesk 5.5 Build 174a.

2 Notes-Client 5.05 necessary

The extensions and modifications of GeoCom® Helpdesk imply the usage of a Notes Client, version 5.05.

3 New Helpdesk menu

GeoCom® Helpdesk has a new main menu. It will be automatically displayed after application start. For better overview of administrated data only four main categories will be displayed.
These are the following:

1. Calls – open
2. Calls – in progress
3. Calls – all

In addition, the main Helpdesk menu displays another main category:

4. Other

However, the view “Statistic“ can only used by members whose dispose the corresponding access rights (“supervisor”).

3.1 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 both, to get an overview of how many new calls there are within the Helpdesk and to see how many new calls are delegated to experts. The view contains information to the call date, the requester (the person who sent an e-mail), the next date, and the name of the person who should solve the problem (in progress by). Finally, the view displays a brief description of the problem.
The view provides information respective to the following items:

- Requester
- Date
- Status (e.g. new)

Description (problem)

3.2 View "Calls - in progress"

The view **“Calls – in progress”** only shows those calls that are in progress, i.e. calls in progress (symbolized by a letter), calls assigned (symbolized by a head), calls just solved (symbolized by a tick) or closed calls (symbolized by a padlock).

The view provides information respective to the following items:

- a. by requester
- b. by editor
- c. by status
- d. by property

New calls will not be displayed within this view.

3.3 View "Calls - all"

This modificated 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 the current processes.
The view provides information respective to the following items:

- a. by requester (requester’s name in alphabetical order)
- b. by editor (names of all Helpdesk-experts in alphabetical order, including calls with action date, calls in progress, personally delegated calls, solved and closed calls)
- c. by status (number of calls in progress, personally delegated calls, solved and closed calls)
- d. by property (number of calls respective to previously assigned properties)
- e. by category (number of calls respective to previously assigned categories, e.g. hardware, software etc.)

3.4 View "Other"

Finally the view “Other” can be subdivided into three different sub views.

The view provides information respective to the following items:

- Alarm profiles
- Categories
- Standard solutions

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.

4 Extensions in call form for members of the Helpdesk

4.1 New feature "Standard solution"

It is possible to declare an opened call as standard solution. To do so select “Helpdesk – standard solution Yes / No?" Instead of “solution” the helpdesk call form displays “solution (s)” in order to indicate that this document will be declared as standard solution. From now, it will be displayed within the view “Other/Standard solutions”

Standard solutions can also be added as entry to the list of knowledge bases (default button). See also configuration document.

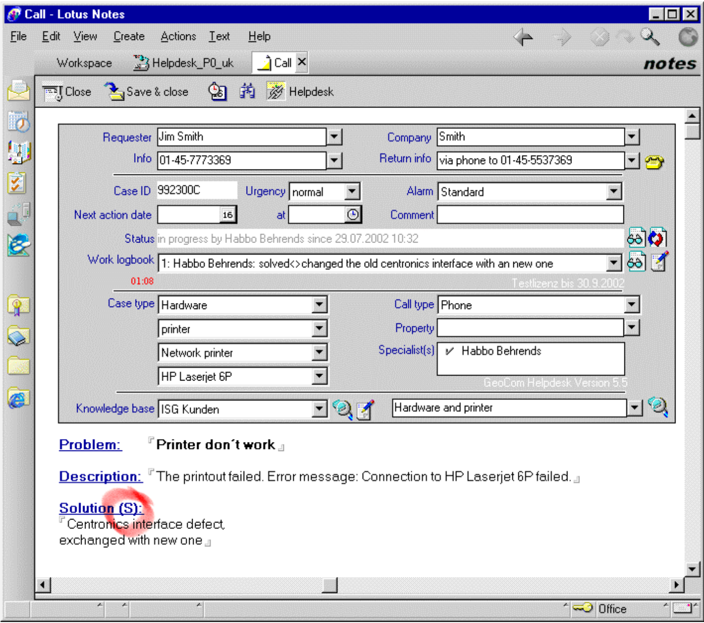


Illustration: Call form as standard solution

4.2 Assigning a new call to an already existing problem

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

To do so select from the menu bar:

“Actions – Assign call to existing problem"

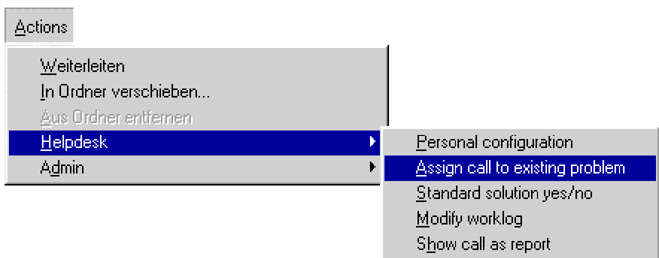


Illustration: Assigning call to existing problem

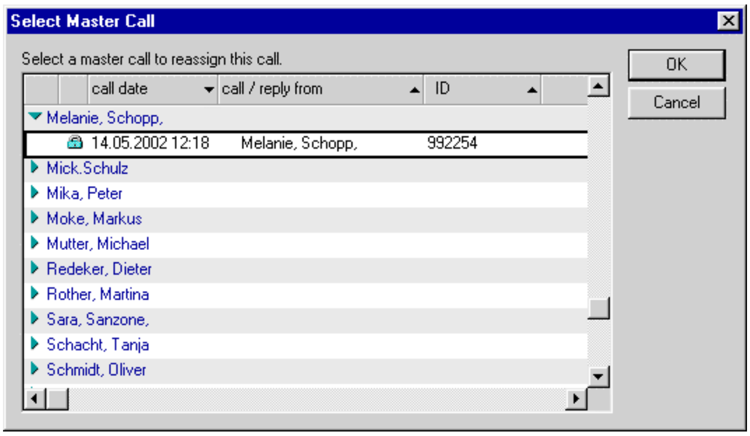


Illustration: Dialog box selection a call for assignment

Subsequently assigning the call, it will be saved as notification document to the main call (problem)

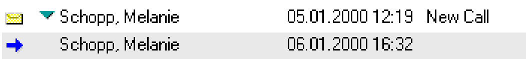


Illustration: Detail of a view with an assigned document

4.3 Displaying worklogs

Up to now an entry from the list of work logs had to be selected in order to view it with the entry form. Now you can create a report including all worklogs concerning this request.

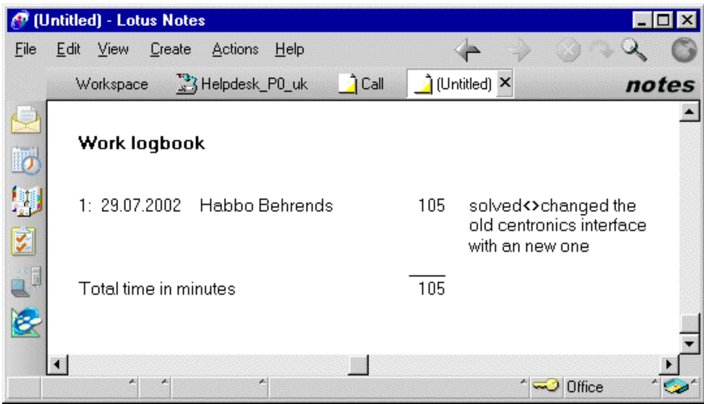


Illustration: Worklog

4.4 Modifying worklogs

Worklogs can be modified, even though they are just saved to the database. To do so, select the corresponding worklog and click on it. Then select from menu bar: “Action – Helpdesk – Modify worklog“

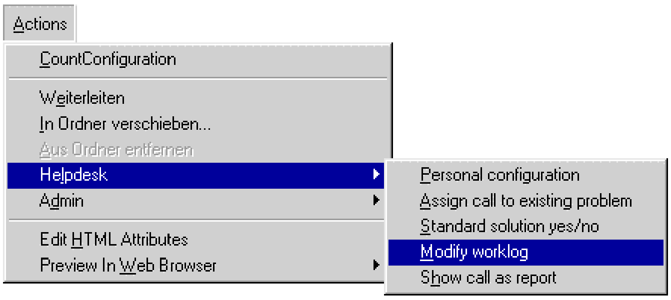


Illustration: Action – Helpdesk – Modify worklog

4.5 Assigning a case type (problem category) using a flat list

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

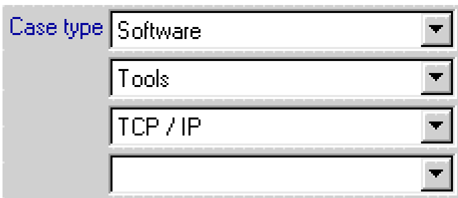


Illustration: Selecting categories hierarchically (procedure so far)

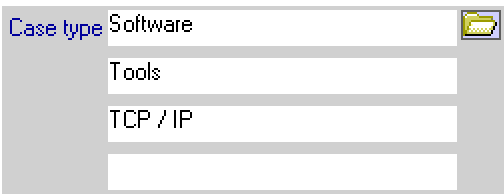


Illustration: Selecting categories via flat list (alternative method)

4.6 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 worklogs.

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

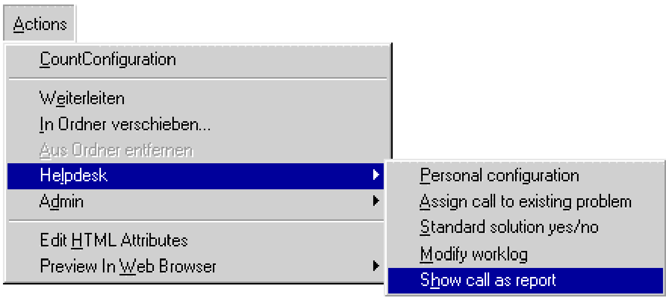


Illustration: Actions – Helpdesk – Show call as report

You'll get a dialog box. Check now details that the report should include:

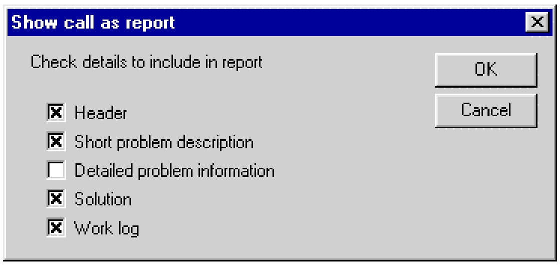


Illustration: Dialog box “Details to include in report“

Confirm your selection with OK and you will get a report form including all the data selected.

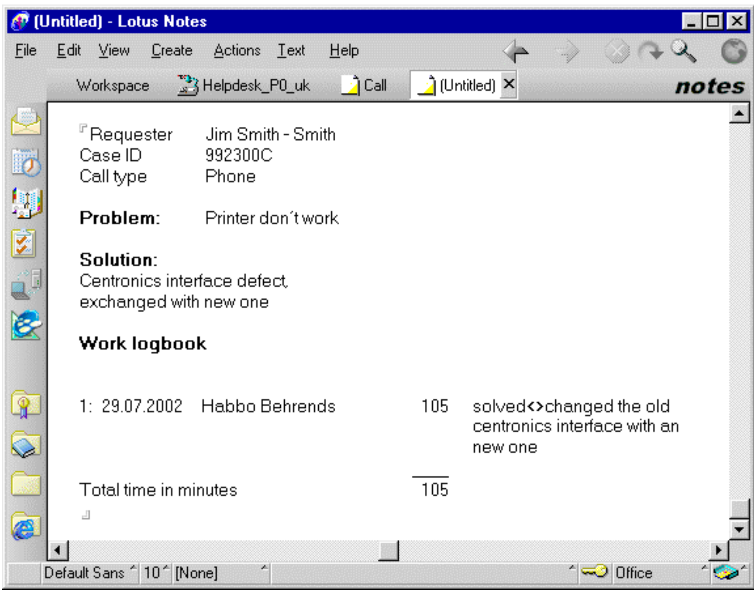


Illustration: Report form

4.7 Extension of full text search in additional databases

Hitherto, full text search was limited to a maximum of 100 hits, which were shown in a dialog list for selection and display.
From now on result area will only be shown when a full text search has been done. From the result set, 5 entries will be shown in a text field. Thus, a faster display of a great many records can be achieved and up to 5000 result entries can be handled.

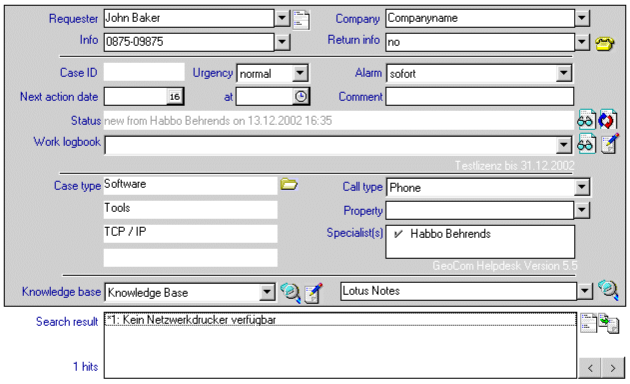


Illustration: Displaying results after a full text search

4.8 Adopting results from a full text search

Hitherto the result of a full text search was displayed as list. The corresponding document could be first selected from the list and then opened within the source database by clicking on the button .

Now, the call form disposes of a button for data adoption . Using this button guarantees that all information from the fields “problem“, “details“ and “solution“ will be attached to the field “solution“.

This modified behaviour is also valid for the selection of calls via the button .

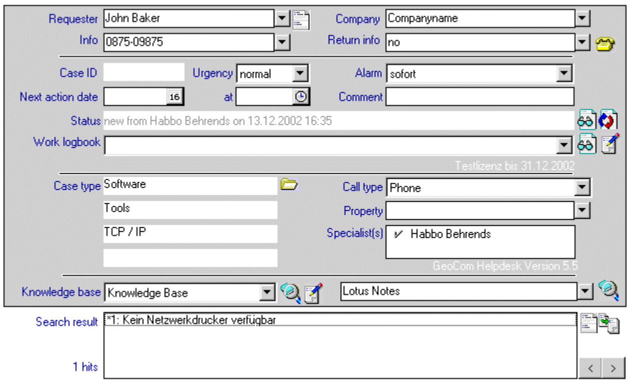


Illustration: New button for data adoption

5 Changes to views

Besides the already mentioned solution documents, which are administrated as standard solutions in view “Other”, the views “Alarm Profiles”, “Categories” and “Statistics” can also be found in the view “Other”.

5.1 New view "Other"

The view “Other“ is composed by three sub views: “Alarm Profiles”, “Categories” and “Standard solutions”.

The sub view “Categories“ shows a synopsis of all defined categories (including sub categories, e.g. “Software”, more specific “Application”, more specific “MS-Excel”).

The sub view “Standard solutions“ shows a synopsis of all solutions saved so far.

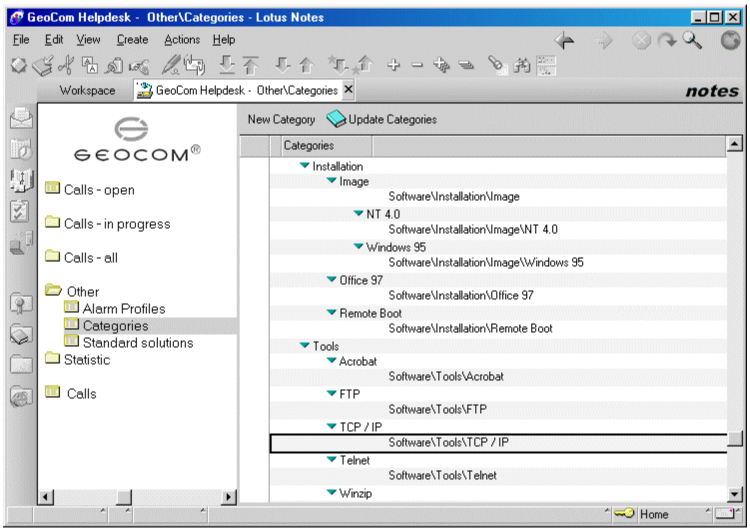


Illustration: View “Categories“

The sub view “Alarm Profiles” will only be shown if the role “Supervisor” is check marked within the ACL. It shows a synopsis of all defined and assigned alarm profiles.

Besides, the view contains information concerning status, necessary actions and trigger (e.g. status not changed for XX hours).

The view “Statistics”, which has formerly been a sub view of “Other”, will only be available if the role “Statistic de” or “Statistic uk” is check marked within the ACL.

5.2 New arrangement of actions in views

Actions are now separated into Helpdesk, Admin and Supervisor actions.

Helpdesk members dispose of the following actions:

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

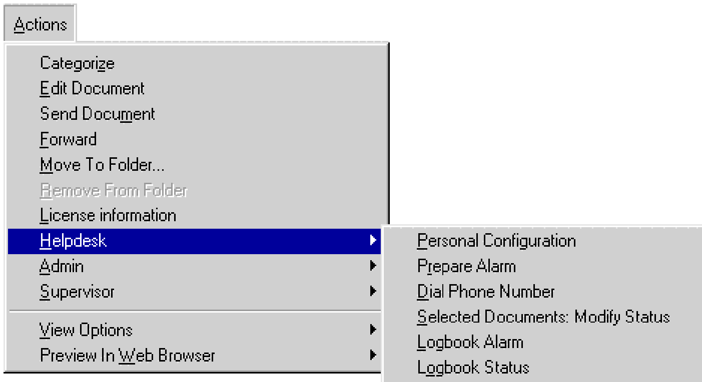


Illustration: Actions for helpdesk staff members

Administrators can use the following actions:

- Configuration
- Statistic Report

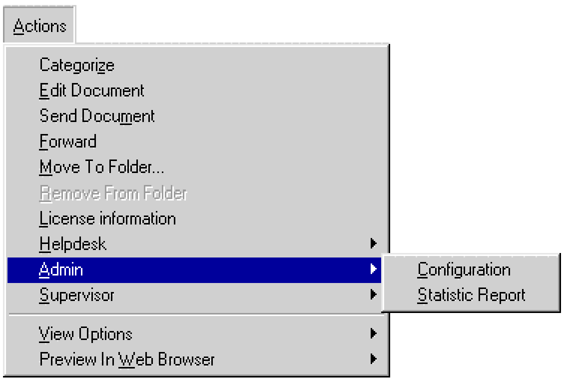


Illustration: Actions for Administrators

Supervisors dispose of the following actions:

- Concert New Mails
- Modify Call ID
- Selected Documents: Modify Common Fields
- Selected Documents: Move to Archive

- Selected Documents: Update
- Modify Categories in Calls

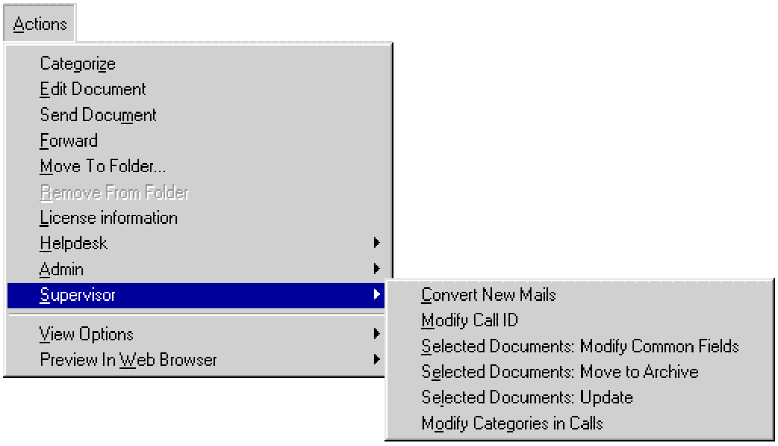


Illustration: Actions for Supervisors

Independently a button for answering calls by e-mail exists in all views. The requester's address will automatically be adopted into the new message. The subject will be the subject of the call.

6 Answers will now be saved to the call

Up to now answers were stored into the processor’s personal mailbox, and thus were not available to other helpdesk staff members. Answers and/or solutions will now directly be saved to the corresponding call into the database. It is also possible to assign further calls or additional information from the same requester (sender) to the original call.

Answers of helpdesk will automatically adopt the specific Call-ID into the subject line of the corresponding solution.

When a document is selected in a view the solution will automatically be adopted into the message. However, this is not true when referencing a further query of the sender. In this case the original message will be adopted.

The specification of the sender’s address is configurable.

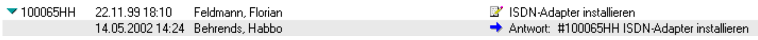


Illustration: Call and response

7 New settings for the global configuration

The global configuration document now disposes of comfortable dialogs for maintaining external databases (for assigning and knowledge databases). Furthermore, a sender's address can be entered by default, so answers will be sent to the application and not to the processor's personal mailbox. You can also configure the stop word list, which had been pre-defined up to now.

7.1 Configuration "Call assigning"

Up to now, a maximum of three sources for call assigning could be configured. This limit has been nullified.

The existing entries will automatically be adopted into the new structure on the first invocation of the database after updating the formation. Further, a dialog box is available to comfortably enter and edit source databases.

The essential changes are in detail:

- For selecting a document you do not further need a column "NoteID", i.e. you can use any database you wish as a source database. These databases cannot be changed by Helpdesk, though.
- Target fields in the call can be filled with an arbitrary combination of texts, field contents, values from a view column or the result of a DbLookup request from further databases.
- For each selection button from the call form an arbitrary choice of database definitions can be deposed

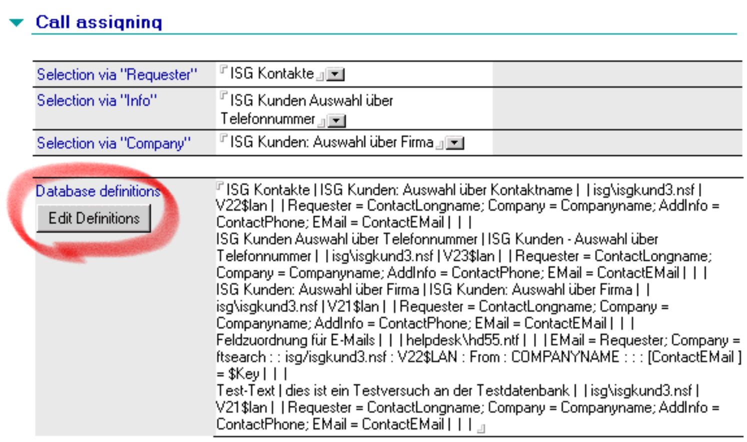


Illustration: Configuration – Call assigning

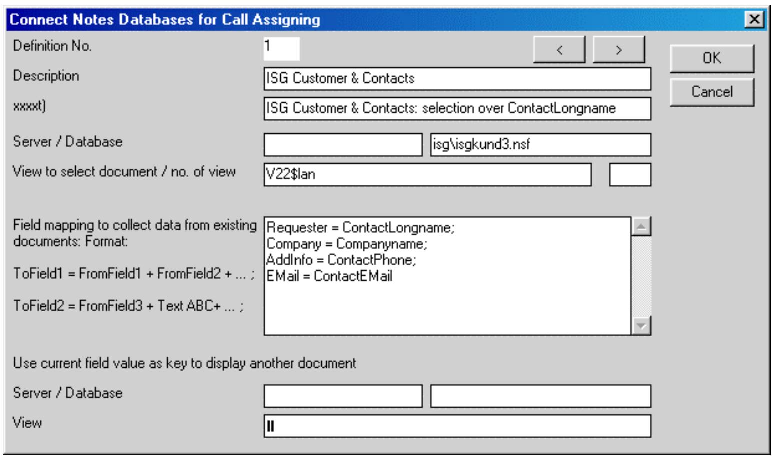


Illustration: Dialog box for database settings

7.2 Configuration "Connect external Notes-Databases"

Database sources can be easily entered and edited with the corresponding dialog box.

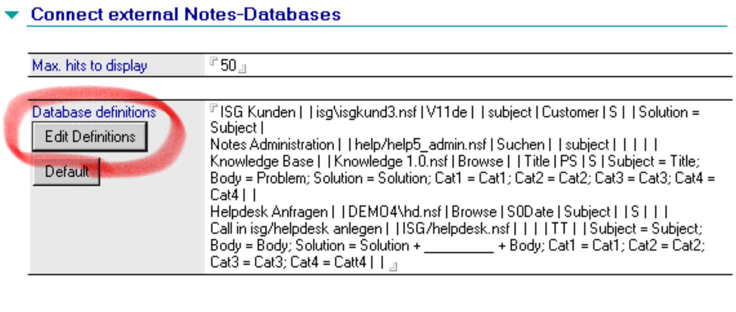


Illustration: Configuration – Connect external Notes-Databases

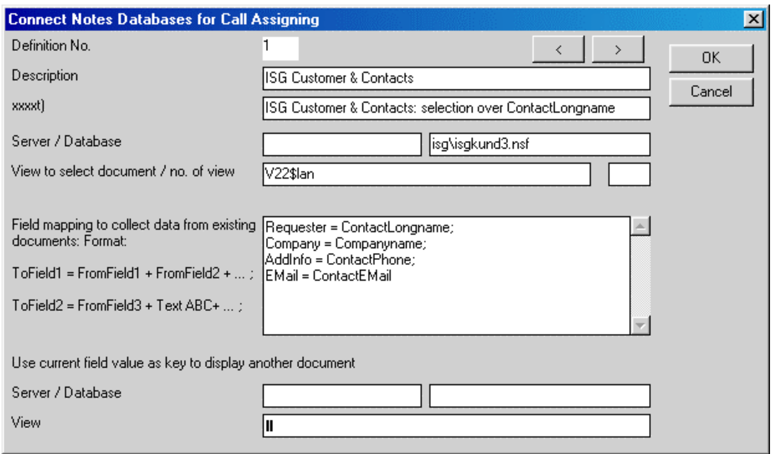
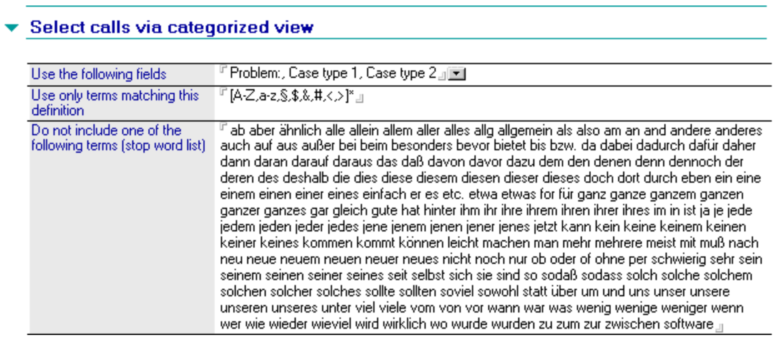


Illustration: Dialog box for managing external databases

7.3 Configuration "Select calls via categorized view"

Up to now, an internal stop word list had been used to automatically generate search terms from the subject line of a call. These terms were shown as categories in the selection view.

This list can now be configured customer specific.



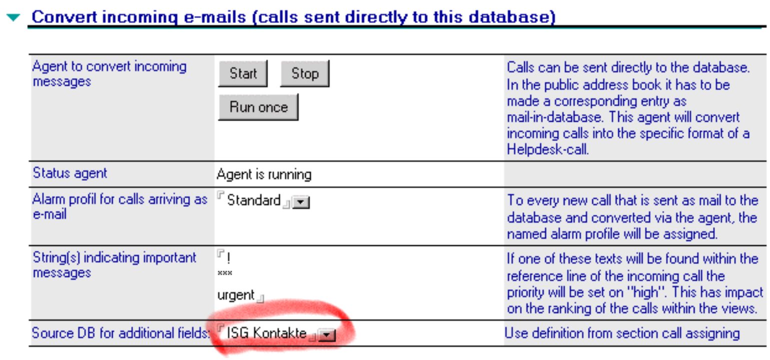
Select calls via categorized view

Use the following fields	Problem:, Case type 1, Case type 2
Use only terms matching this definition	[A-Z,a-z,§,$,&,#,<,>]*
Do not include one of the following terms (stop word list)	ab aber ähnlich alle allein allem aller alles allg allgemein als also am an and andere anderes auch auf aus außer bei beim besonders bevor bietet bis bzw. da dabei dadurch dafür daher dann daran darauf daraus das daß davon davor dazu dem den denen denn dennoch der deren des deshalb die dies diese diesem diesen dieser dieses doch dort durch eben ein eine einem einen einer eines einfach er es etc. etwa etwas for für ganz ganze ganzem ganzen ganzer ganzes gar gleich gute hat hinter ihm ihr ihre ihrem ihren ihrer ihres im in ist ja je jede jedem jeden jeder jedes jene jenem jenen jener jenes jetzt kann kein keine keinem keinen keiner keines kommen kommt können leicht machen man mehr mehrere meist mit muß nach neu neue neuem neuen neuer neues nicht noch nur ob oder of ohne per schwierig sehr sein seinem seinen seiner seines seit selbst sich sie sind so sodaß sodass solch solche solchem solchen solcher solches sollte sollten soviel sowohl statt über um und uns unser unsere unseren unseres unter viel viele vom von vor wann war was wenig wenige weniger wenn wer wie wieder wieviel wird wirklich wo wurde wurden zu zum zur zwischen software

Illustration: Default values for the generation of categories

7.4 Configuration "Convert incoming e-mails"

Additional fields of the call form can now automatically be filled by a definition from “Call assigning”



Convert incoming e-mails (calls sent directly to this database)

Agent to convert incoming messages	Start Stop Run once	Calls can be sent directly to the database. In the public address book it has to be made a corresponding entry as mail-in-database. This agent will convert incoming calls into the specific format of a Helpdesk-call.
Status agent	Agent is running	
Alarm profil for calls arriving as e-mail	Standard	To every new call that is sent as mail to the database and converted via the agent, the named alarm profile will be assigned.
String(s) indicating important messages	! *** urgent	If one of these texts will be found within the reference line of the incoming call the priority will be set on "high". This has impact on the ranking of the calls within the views.
Source DB for additional fields:	ISG Kontakte	Use definition from section call assigning

Illustration: Configuration – Convert incoming e-mails

7.5 Configuration "Outgoing messages"

The configuration section “Outgoing messages“ lets you configure the fields “Reply to info” and “Sender info for messages via SMTP”. An entry for “Reply to info” could be:

"*@* | helpdesk@geocom.de@NotesDomain"

For configuration of Call assigning and incoming e-mails allocation of further fields can be configured via Lookup in an external Notes-DB.

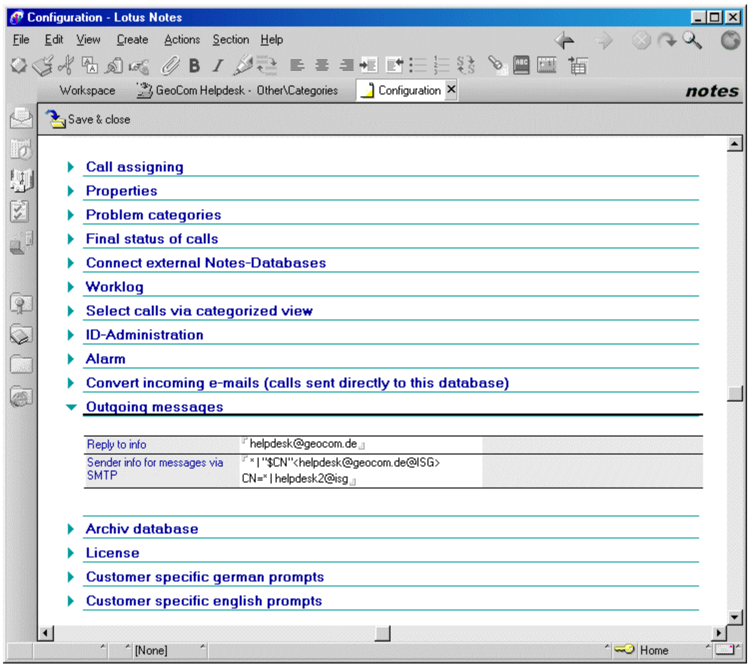


Illustration: Configuration – Outgoing messages

7.6 License

Up to now each Helpdesk staff member had to be registered in the access control list. This limitation has been nullified.

In the global configuration document the button Update automatically detects the authorized staff members, also from groups. Only members of this list are authorized to access Helpdesk.

Thus, the Helpdesk-Administrator does not need manager rights any more and the ACL may also contain groups besides persons.

Should the access control list contain more entries than there are licenses acquired, only the first NN staff members will be adopted as authorized, where NN is the number of licenses.

7.7 Default Personal Configuration for new Users

From within the configuration document you can access the “Default Personal Configuration for new Users” by selecting the corresponding entry from the “Actions”-menu. The form corresponds to the Personal Configuration document.

When a new user accesses the database for the first time, his personal configuration settings will be adopted from the Default Personal Configuration settings. An action from the personal configuration document lets you adopt the default settings later, if you wish.

8 New settings within the personal configuration document

As described, settings were carried out in a dialog box. Now, the configuration settings both for the personal configuration and the global configuration will be showed in document-type.

For better overview the parameters will be presented separately:

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

The configuration parameter "Common settings" serves to activate the standard navigator. Instead of the Helpdesk-menu the standard navigator will be showed (after application start). It is available after re-start.

8.1 Displaying open calls automatically

The configuration parameter "New call settings" serves to set whether open calls should be displayed automatically or not. Altogether you can select between for options: ("No", "Requester", "Company", "Requester and Company"

As default setting for "customer support" the option "Requester and Company" is recommended. For "In-house-support" (support for own employees) the field "company" is usually used to indicate the branch or division. However, this leads to a huge number of open calls within the view. It can be avoided by selection the option "Requester" (recommended).

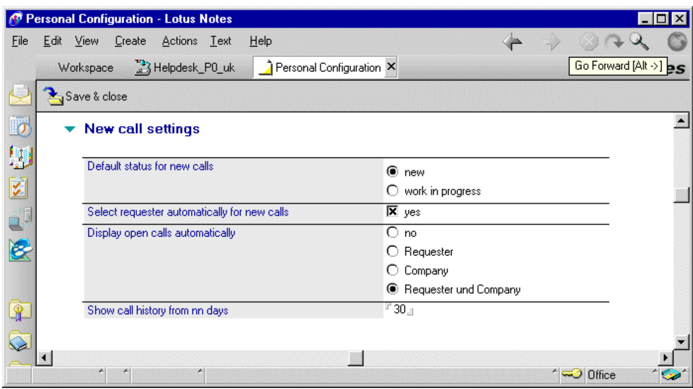


Illustration: Section "New call settings" (Personal configuration document)

8.2 Send notification after call assigning automatically

Hitherto after assigning a new call to a person or to a group the button  to send a notification was displayed. Now, you can configure if (while closing an assigned new call) a notification to a corresponding person or group should be sent automatically or after confirmation.

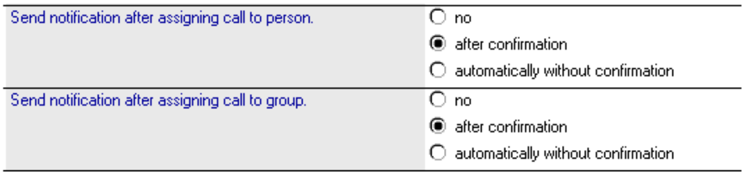


Illustration: Settings for sending notification automatically (after confirmation)

8.3 Name of mail-database for personal alarms

Personal alarms will be entered to the personal mail database. For this the mail database of the currently activated location document will be used. If you NOT wish to use the current database for personal alarms, you can define another database. To do so, you have to fill in the complete file path of the new database. As server will be indicated the server on that the Helpdesk database currently runs.

8.4 Assigning problem categories

The section "Edit call settings“ can be used for the assigning of problem categories. It serves for the configuration whether problem categories should be selected hierarchically or a flat list should be used.

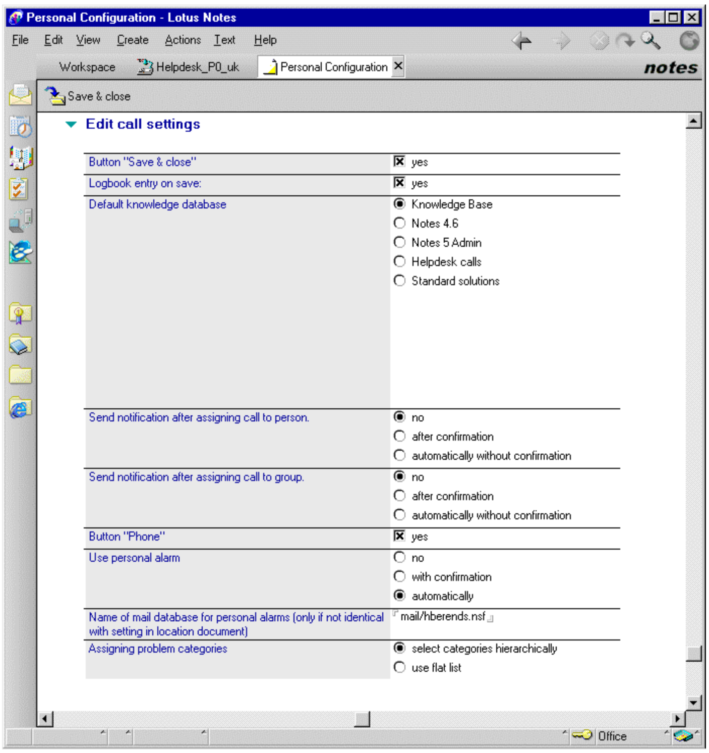


Illustration: Configuration – assigning problem categories

9 Statistic report

The action "Statistic report" was modified. The formerly report functionality of the database HD Reports was integrated. By this it is now possible to compare different report types over a period of time. Optionally, you can display calls as list.

This report is best suitable for exportation to spread sheet programs (e.g. MS-Excel)

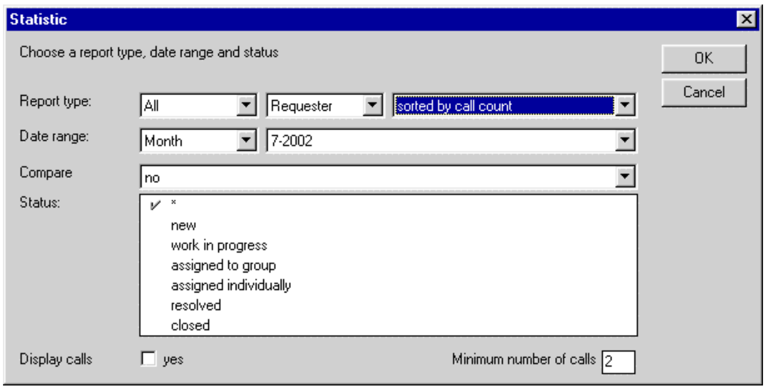


Illustration: Dialog box for selection of report types

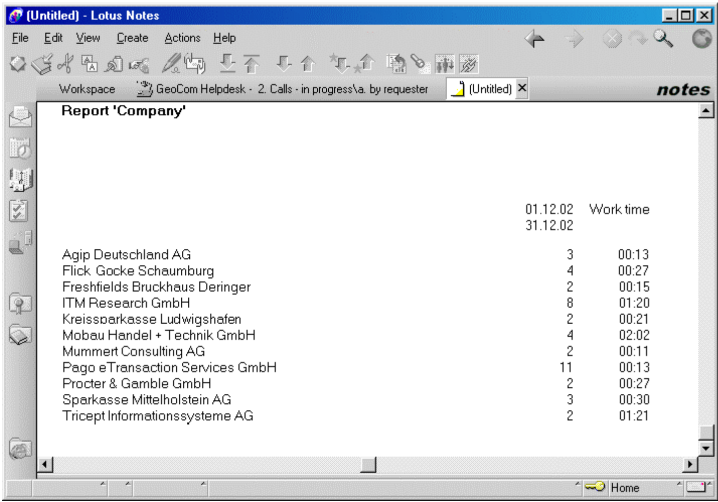


Illustration: Statistic report according to companys

10 Bugfix

10.1 Dialog box "worklog start and ending-time "

Elimination of aberration within the dialog box “worklog with start and ending time“.

10.2 Indication "Responsibility to ..."

The indication "Do you want to take responsibility …” will be suppressed for own calls.

10.3 Logbook entry on save

If the checkbox “logbook entry on save“ was selected, the indication was displayed every time you saved the document. This automatically displayed query will now be suppressed when a worklog was just entered during call processing.

10.4 Alarm-agent

The usage of alarm definitions for alarms indicated within the personal mail box (yellow pop-up window) was cancelled if access rights for the database were absent.