

Application on Lotus Domino®



**GEOCOM®  
HELPDESK**

## **Manual for Helpdesk-User**

Version 5.5

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## 1 Introduction

GeoCom<sup>®</sup> 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 or fax(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.

The screenshot displays the GeoCom Helpdesk interface for a specific case. The form includes the following fields and values:

- Requester:** Florian Feldmann
- Company:** ISG Information Systems GeoCom GmbH
- Info:** 0234-94175-0
- Return info:** no
- Case ID:** 15151515
- Urgency:** normal
- Alarm:** sofort-alarm
- Next action date:** 07.06.2002 at 14:00
- Comment:** (empty)
- Status:** in progress by Habbo Behrends since 17.06.2002 17:11
- Work logbook:** 6: Habbo Behrends: done
- Case type:** Hardware
- Call type:** Phone
- Property:** (empty)
- Specialist(s):**  IT-Support
- Knowledge base:** Knowledge Base
- Hardware:** Hardware

GeoCom Helpdesk, Version 5.5

Illustration: Call form

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

For Helpdesk staff members there is a new working area. This means that the staff can choose between a Helpdesk-menu (default) and a standard navigator.

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

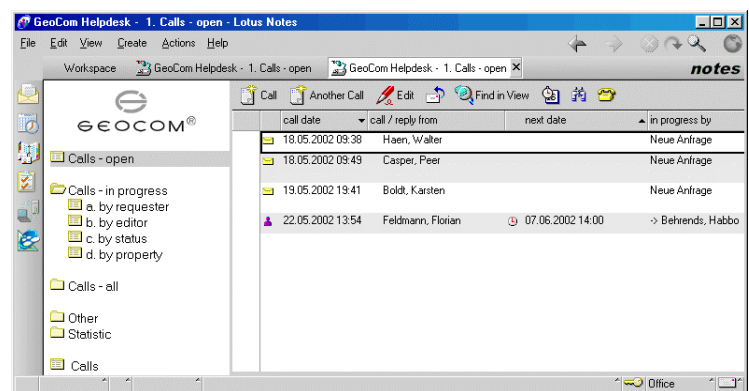


Illustration: Personal working area

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

**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.

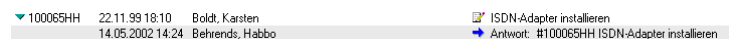


Illustration: Call and solution within one view

### 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.

The view provides information respective to the following items:

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

## 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

New 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 subviews in order to get a completely structured overview of actual working 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.)

## 2.4 View “Other”

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

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.

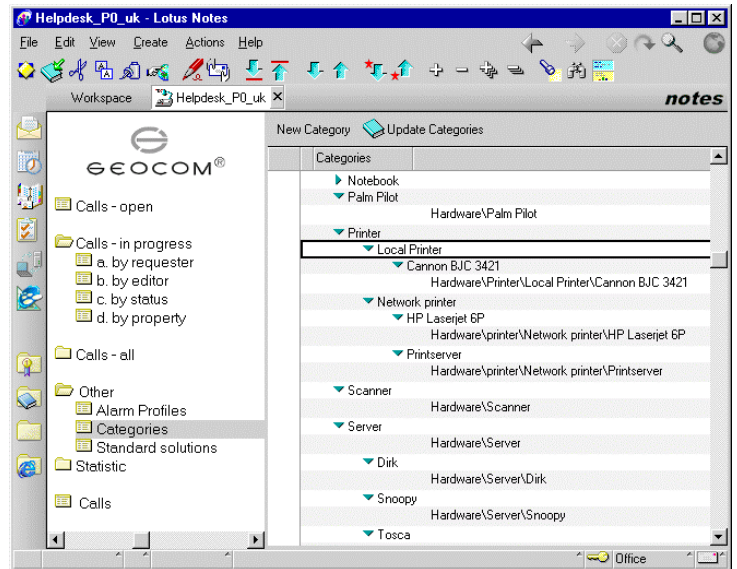


Illustration: View Other

The sub-view "Alarm Profiles" shows an overview of all defined and distributed alarm profiles. This view will only be displayed if the role "supervisor" was checked 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).

By some mouse-clicks authorised persons can retrieve documents to edit them.

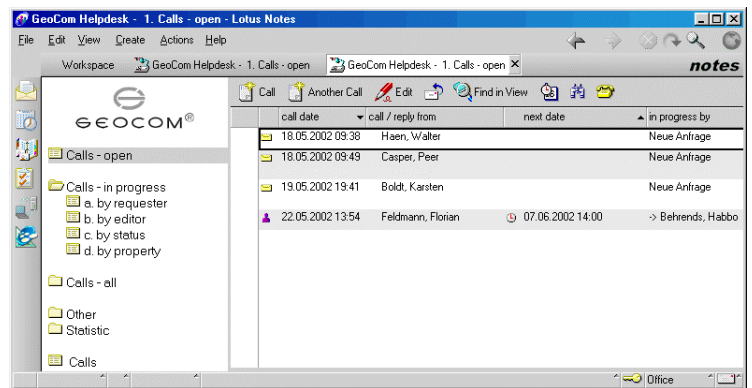


Illustration: View Helpdesk-menu

The Helpdesk-menu on the left side of the screen provides Helpdesk staff members with detailed information to all views and subviews.

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  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 Generating new calls

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

- Calls generated by the user or customer himself
  - Calls generated by a member of the Helpdesk (Hotline)
  - Calls generated by sending a message to the database
1. Usually the user generates a call by filling out the call form (a special mask) of GeoCom® Helpdesk. Therefore 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
  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.
  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.

#### 3.1 Recording calls through in-house-employees (user)


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

Therefore the requester fills in the following call form that can be sent as e-mail.

Illustration: 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  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.

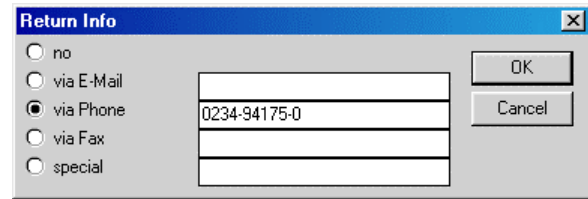




Illustration: Dialog box return info

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.

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:

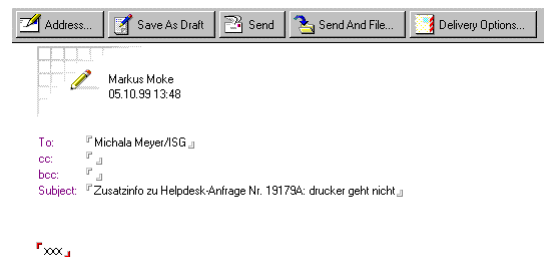


Illustration: E-mail as additional information to the Helpdesk

First fill in the e-mail-address of the Helpdesk, e.g. [helpdesk@company.uk](mailto:helpdesk@company.uk).

Click on 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.

The procedure begins with the registration of the name and company of each requester: Then the problem will be evaluated and, if necessary delegated to specialists on the Second-Level-Support.

#### 3.2.1 The call form for Helpdesk staff members

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.

Using the advanced call form it is possible to search and select the categories 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 – Admin – Standard solution Yes / No?" from Menu bar (see also standard solutions).

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

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

This section has four 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.

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")

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 Case type: 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 Call type: Using the pull-down-menu you can set the way a call was transmitted to the Helpdesk, e.g. via phone, e-mail etc.
3. Field Property: Using the pull-down-menu you can select a previously defined property, e.g. a specific project.
4. Field Specialists: This field remains hidden as long as no classification of a problem was done.

The section **problem solution** 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.

### 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  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



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).

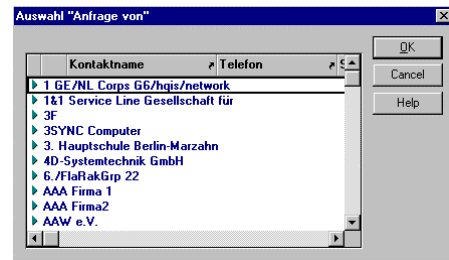


Illustration: Dialog box selection requester

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 twistie. 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.

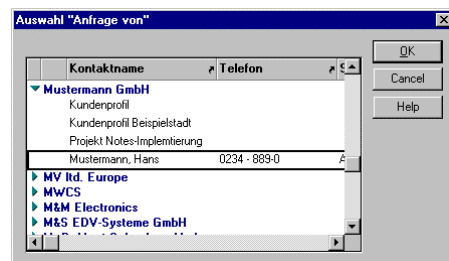



Illustration: Dialog box selection contact profile

Using the button  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.

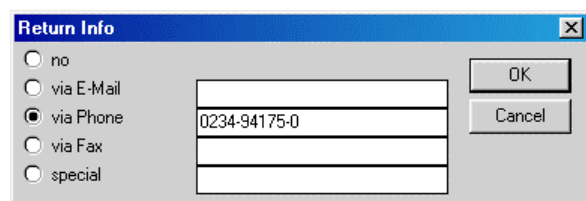


Illustration: Dialog box return info

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 select from the menu bar:

“Actions – Assigning new call to existing call”

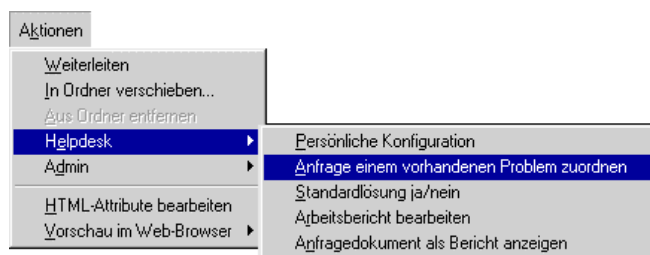


Illustration: Action Assigning new call to existing call

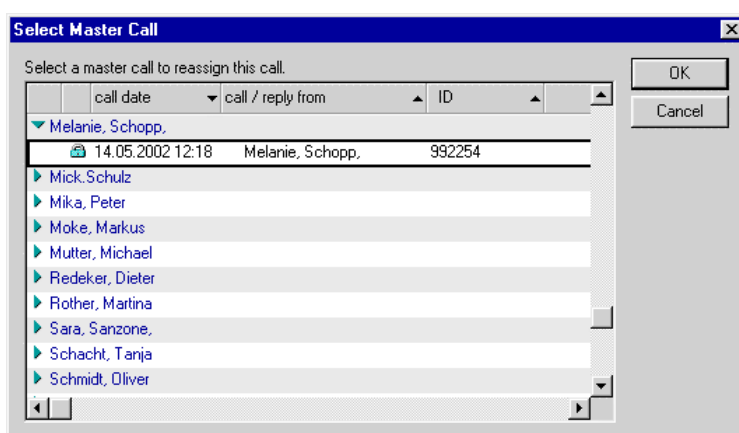


Illustration: Dialog box selection a call for assignment

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

	▼ Schopp, Melanie	05.01.2000 12:19	Neue Anfrage
	→ Schopp, Melanie	06.01.2000 16:32	

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](mailto: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 status.

### Status 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 faculty:** 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.

**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  within the call form. The following dialog box appears:

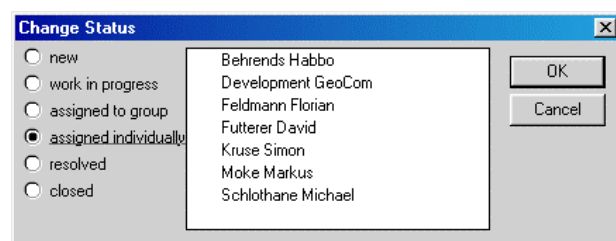


Illustration: Dialog box to change status

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 status:

- New
- In progress
- Assigned to group
- Assigned individually
- Resolved
- Closed

#### 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 picture shows an example:

The screenshot shows a dialog box for classifying a call. It has two columns of dropdown menus. The left column is labeled 'Case type' and has a main dropdown set to 'Hardware'. Below it are three sub-dropdowns: 'Notebook', 'Printer', and 'Local'. The right column has three dropdowns: 'Call type' set to 'Phone', 'Property' set to 'Installation', and 'Specialist(s)' set to 'IT-Support'. A small version number 'GeoCom Helpdesk Version 5.5' is visible in the bottom right corner of the dialog box.

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 (see also personal configuration “assigning problem categories”).

#### 4.5 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.


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

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

#### 4.6 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  in order to search for relevant information.

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”.

#### 4.7 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 button .

Select a database and perform one of the following actions:

- Opening the database in order to seek information
- Entering terms for searching
- Selecting a solution document (if the searching process was successful)
- Showing a solution document

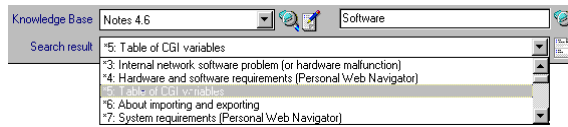




Illustration: Notes-database knowledge base

Click on the pull-down menu in order to display the hits and select a solution document from the list, then click the button . The entire solution document will be displayed. The information can be adopted – as described – via cut and paste into the call form.

#### 4.8 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 on the button . A dialog box opens that displays all calls that are registered within the Helpdesk-database.

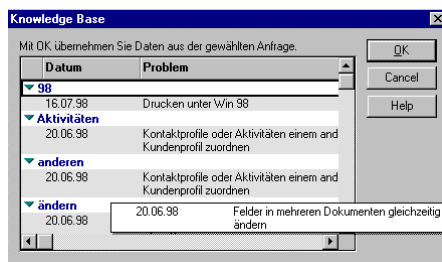



Illustration: Knowledge base

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.

To record the call as document, click on the button . You'll get a form sheet (tech. note) that already contains the relevant information. Fill in a title and a brief description of the problem. Into the field solution enter the solution or attach documents or files.



ID	GeoCom1/ISG A; GeoCom2/ISG B; GeoCom3/ISG C	Category 1	Hardware
Document type:		Category 2	Printer
Keywords		Category 3	
Language		Category 4	
Created by	Markus Moke/ISG on 08.03.2001 16:51	Modified by	
<b>Title:</b> Druckertreiber			
<b>Problem</b>			
Fehlhafter Druckertreiber			
<b>Solution</b>			
 laserjet			

Illustration: Solution document

#### 4.9 Displaying search queries (query history)

In order to display search queries click on the selection button  within the search query field.



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

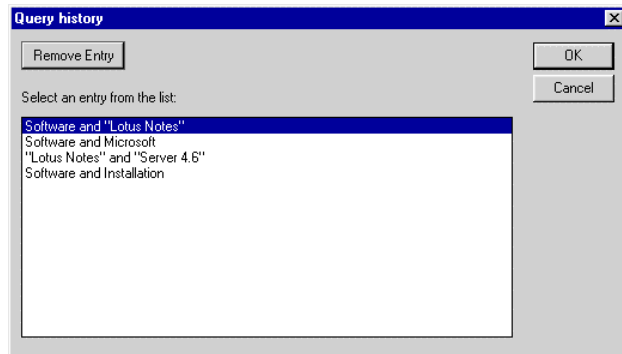




Illustration: Dialog box displaying query history

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 . The entry will be removed from the list.

#### 4.10 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 . Now all necessary information will be reproduced automatically. Then provide the new document with additional information and save it to the database.

#### 4.11 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 . You'll get 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 assuming responsibility is pre-selected as the working time. Thus, this pre-selection can be changed individually. Finally confirm with OK.


#### 4.12 Displaying work logs

To display work logs click on the button  within the call form.

Work logbook			
1:	29.07.2002	Habbo Behrends	105 solved<>changed the old centronics interface with an new one
Total time in minutes			105

Illustration: Work log

#### 4.13 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 button  within the field work log and select the corresponding entry from the list.

Then select from menu bar:

“Action – Helpdesk – Modify work log“

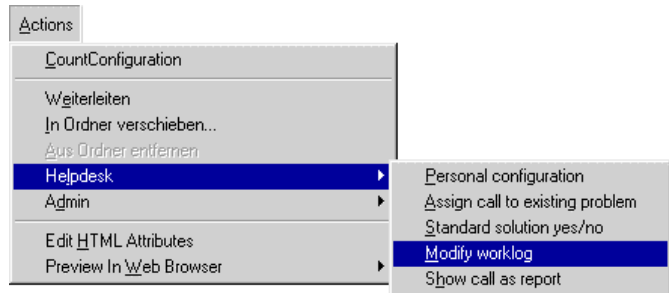


Illustration: Modify work log

After modifying the work log confirm with OK.

**4.14 Simultaneously delegation of tasks to specialists or faculties**

Problems that can not 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  within the form you'll change the status. Then either select "assigned individually" and a single person or select "assigned to group" and a group of specialists.

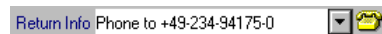


Illustration: Dialog box change status

**4.15 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.




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



**4.16 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  and select one of the corresponding status.

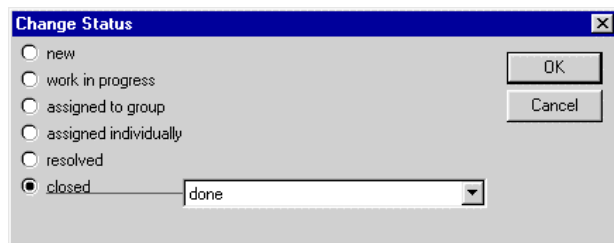


Illustration: Dialog box change status

Additionally, it's possible to select a final status of 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.

#### 4.17 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: Following options are available:

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

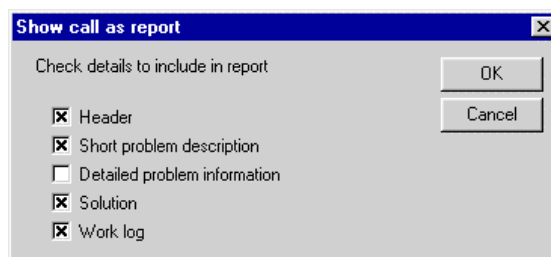


Illustration: Dialog box show call as report

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

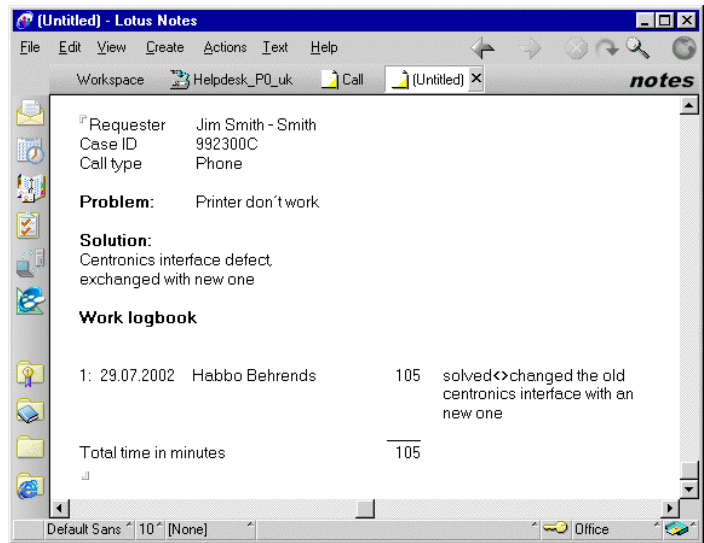



Illustration: Call as report

## 5 Additional Notes-databases

According to the settings within the global configuration document, several external databases can be connected to the Helpdesk database. These connected Notes databases can be used for full text search and for generating new documents.

Using the selection button  within the field knowledge base

Knowledge base   you can select a database. The following example shows a selection.

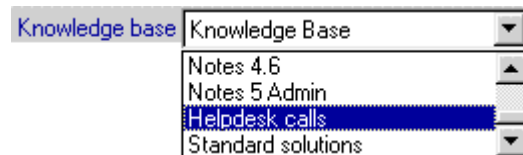


Illustration: Pull down menu for selection of knowledge bases

To specify the database, that should appear automatically when opening a call form, use the personal configuration document (see also personal configuration).

## 6 Views

GeoCom Helpdesk provides different views for “normal” users (requesters) and Helpdesk staff members (Hotline, Specialists). The different views will now be described:

### 6.1 Views for users (requesters)

All members of the company who have access to the application within the LAN are clients of the Hotline. In case of problems they can send an e-mail to the Helpdesk. However, in contrary to the Helpdesk staff members, these users only have a restricted view of the application.

Usually 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.

The user has full access to the following views of the application:

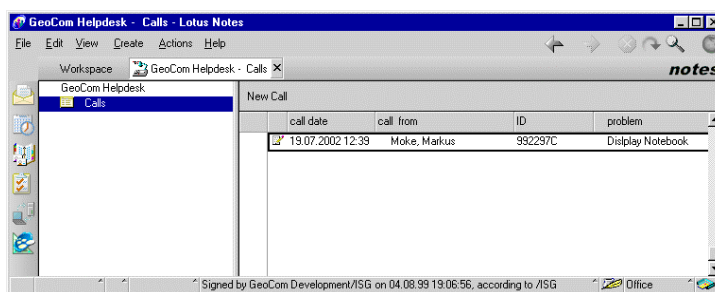


Illustration: View calls (user resp. requester)

**Calls Open:** A new call keeps the status “new” as long as the Hotline do not work on it. During this time the requester can modify the call and / or add further information respectively. However, as soon as the Hotline takes control over the call, the requester cannot change the call anymore.

**Closed calls:** The Hotline or the Second-Level-Support has carried out the necessary work and supplied a corresponding solution to the document, respectively.

**Work in progress:** Through this view the requester can pursue which of his calls are actually in progress or which calls are already assigned to the Second-Level-Support.

The view provides information for the user to the following parameters:

ID-number / Date / Requester (requester's E-mail address) / status (calls open, work in progress, closed etc.) / problem description.

### 6.2 Views for Helpdesk staff members

Different to the views for the user the interface of the members working for the Helpdesk offers more detailed views.

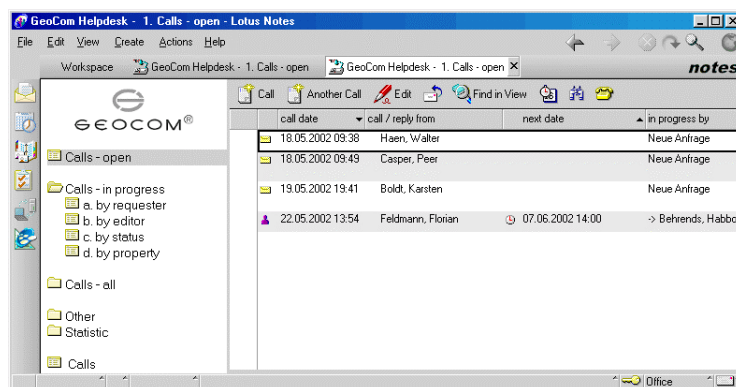


Illustration: View 1. Calls - open

### 6.2.1 Calls – open

The view **Calls - open** shows only those calls that are currently not in progress. New calls that are not transferred into another status will be displayed within the view by a symbolised envelope (✉).

Assigned calls will be displayed within the view by the symbol of a person (👤). This view not only provides information respective new calls that are sent to the Helpdesk but also which calls are individually (personally) assigned.

Calls can be opened by a double mouse click, in order to read them and to subsequently change the status from e.g. new into work in progress / assigned individually etc.

### 6.2.2 Calls – in progress

The view **Calls - in progress** with its four subviews 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 subviews:

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

Illustration: View 2. Calls – in progress

**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 respective ID-number, date of its generation and name of the requester. Beside this the name of the Helpdesk member currently working on a call as well as a brief description of the problem is retrievable.

### 6.2.3 Calls – all

Similar to the views described before, the view **Calls - all** also conveys five subviews. 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 subviews:

- 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 3. Calls - all c. by status

#### 6.2.4 Other

The view **Other** provides three subviews, which – according to database access – are displayed within the navigator. Normally for Helpdesk staff members the views „Categories“ and “Standard solutions“ are available.

The sub-view “Categories“ displays an overview of all defined categories (with each sub-category, e.g. “software“, more specific “application“, more specific “MS-Excel“).

The sub-view „Standard solutions“ gives an overview of all saved solutions until now.

Illustration: View Other

#### 6.2.5 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 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

### 6.2.6 Setting alarm profiles

To create a new alarm profile first select the view “Helpdesk –

Other/Alarm profile”. Click then on the button within the action bar.

Fill all necessary data into the form. With the alarm function it is possible to supervise the reaction time for each call.

Illustration: Dialog box for alarm settings

### 6.2.7 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 - Category

### 6.2.8 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  within the action bar. Into the form Category you can enter the different levels to which the problems belong.


Illustration: Dialog box to select responsible specialists from the Notes address book

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  within the action bar. Click on the button  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 .

To update the category list click on the button  within the action bar.

### 6.2.9 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.

### 6.2.10 Defining standard solutions

Having filled in a text for the trouble shooting to the field “Solution” within the Call form, the document can be defined as standard solution. To do so click on “Actions – Admin – Standard solution Yes/No” within the menu bar.

The call form shows now within the field Solution an “S” in brackets “Solutions (S)”. This indicates that the corresponding document is defined as standard solution. This document now can be opened from the view “Other/Standard solutions”.

Standard solutions also can be adopted as entries to the list of

knowledge databases. For this use the global configuration document (button default).

Illustration: Call form as standard solution

### **6.3 Groups of actions within views**

Actions will be assorted to different groups. These groups are as follows:

- “Helpdesk”
- “Admin”
- “Supervisor”

#### **6.3.1 Helpdesk**

For Helpdesk staff members the following views are available:

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

Illustration: View “Helpdesk” within menu “Actions”

### 6.3.2 Admin

For administrators the following actions are available:

- Configuration
- Statistic Report

Illustration: View “Admin” within menu “Actions”

### 6.3.3 Supervisor

For supervisors the following actions are available:

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

Illustration: View “Supervisor“ within menu “Actions“

## **7 Resubmission**

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

### **7.1 Setting resubmission date**

In order to mark a document with a re-submission date first select the corresponding document within the view and then click on the button

within the action bar.

You'll get the following dialog box:

Through the calendar you can select a date for re-submission, and decide whether the background time control should be temporarily switched off and enter - if useful - a brief comment. Finally confirm with OK.

## 8 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.

### 8.1 Views (statistic)

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

➡ **INFO:** The view "Statistic" is only available for members who have the necessary access rights (e.g. Statistic uk).

The view can be opened using "View – Go to ... – Select file or views". First select the view "Other" and then the sub-view "Statistic".

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 "Statistic a. call open time"

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.

Finally 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.

## 8.2 Creating statistic report

Using the action "Statistic report" it is possible to visualise optional new 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.

The "status" of a call can also be selected (e.g. in progress, closed 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" that the statistic report should include.

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

Illustration: Statistic Report

## 9 Alarm

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.

### 9.1 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.

## 9.2 Deleting alarm entries from calendar

In order to delete an alarm entry from the Notes calendar first open your personal Notes calendar and checkmark the corresponding entry. Now press delete and then F9.

You'll get the following dialog box:

Illustration: Dialog box Delete Entry

Confirm with OK. The entry will be removed from your personal Notes calendar.

➤ **INFO:** Alarms will only be displayed within the personal Notes calendar if the call was saved before and the fields "date" and "time" contain entries.

## 10 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 different configuration parameters will be grouped into the following sections:

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

Illustration: Section “Common settings“ (Personal configuration document)

To save and abandon the configuration document click on the button "Save and close" within the action bar.

## 10.1 Common settings

Illustration: Section “Common settings“ (Personal configuration document)

### 10.1.1 Dialogue language

Use this section to set the dialog language (English or German) of the interface. Views are not affected. To see language dependent views you must have the appropriate roles assigned by an Notes Administrator.

### 10.1.2 Show standard navigator

Use the checkbox to decide to show the standard navigator instead of the Helpdesk-menu (this menu will show automatically after database start). The standard navigator will only be shown after application re-start.

## 10.2 Application start settings

Illustration: Section “Application start settings“ (Personal configuration document)

### 10.2.1 Tickler auto display

Use the option “Tickler auto display if entries within the next NN days“ to set the time range for displaying documents with re-submission date at application start.

Aside current documents with re-submission date also future entries – if available – will be displayed.

## 10.3 New call settings

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

#### **10.3.1 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“.

#### **10.3.2 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.

#### **10.3.3 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 while saving. 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.

#### **10.3.4 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 fill into the field 365.

### **10.4 Edit call settings**

Use this section to set parameters around editing a call.

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

#### **10.4.1 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.

#### **10.4.2 Logbook entry on save**

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

#### **10.4.3 Default knowledge base**

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

#### **10.4.4 Send notification after assigning call to a person**

This 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.

#### **10.4.5 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.

#### **10.4.6 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.

#### **10.4.7 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.

#### **10.4.8 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 current active environment. If the database defined here 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. mailmsmith.nsf). The system where the currently used Helpdesk application runs will be used as server.

#### **10.4.9 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.

### **10.5 Other Actions**

There are the following actions available from the the actions menu:

- Use settings for new users

#### **10.5.1 Use settings for new users**

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