GEOCOM®

Lotus Domino® Application

GeoCom®Helpdesk

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Update 6.5 Build 653

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1 Introduction

This documentation describes changes and enhancements of GeoCom® Helpdesk 6.5 Build 652.

With the update GeoCom® Helpdesk 6.5 Build 652 some improvements were made which will be explained in the following.

The update particularly enhances the application by a browser interface. With this interface it is possible to access the application via web browser (e.g. Mozilla, Internet Explorer).

☛ **INFO:** Operating the application via the web browser interface differs in some points from operation via a Notes client. Especially maintenance and configuration of the application can only be done from a Notes client.

For more detailed information regarding the browser interface, please refer to the *Manual for web browser interface* for GeoCom® Helpdesk.

2 New license key required

Along with the update GeoCom® Helpdesk 6.5 Build 652 a new license key will be delivered. Enter this license key into the corresponding field within the global configuration document.

3 Notes client / web browser

GeoCom® Helpdesk 6.5 Build 652 requires systems running Lotus Notes clients resp. server of version 6.5.4 or later.

The list of supported web browsers includes Microsoft Internet Explorer from version 5.5 as well as Mozilla from version 1.0.

4 Access rights

Upon updating to GeoCom® Helpdesk 6.5 several changes have to be made to the access control list (ACL). Certain users may require other roles than before.

4.1 Language dependency

Up to now, language dependencies of views have been specified via the ACL by assigning corresponding roles.

This procedure has changed. Now, each user selects the desired interface language within his personal configuration. A default language for new users can be specified within the global configuration.

This means, Helpdesk members will not use the roles [Level1-uk] resp. [Level1-de] any more. They now require the role [Level1] to be identified as Helpdesk members. Whether they use the English or German interface will be specified within their personal configuration.

☛ **INFO:** To ensure access to certain Helpdesk views *all* members of the Helpdesk must dispose of the role [Level1]. This also applies to e.g. administrators and pure second level supporters who normally are not responsible for call recording.

4.2 Access rights for normal users

The roles [Lan-uk] resp. [Lan-de] will not be used to identify normal users of the application.

Instead, every Notes user who has been added to the application's ACL will have user access. The interface language for normal users is predefined within the global configuration document and can later be edited via the user's personal configuration.

☛ **INFO:** Being added to the ACL will only provide the user with the views for normal users. To ensure additional functionality for the user, he may also be assigned other roles, e.g. [Creator] to be able to create new calls, [ReadCalls] for read access to other users' calls or [ReadSolution] to be able to read solution documents that have been released for user access.

4.3 Limit web browser access

By default, users will access the database with the same access rights, whether they use the Notes client or the browser interface (with the exception of certain actions, like e.g. changing the global configuration etc., see also the corresponding web interface documentation).

In order to define general restrictions for accessing the database via web browser (e.g. if only standard user access should be allowed) you can limit the internet access for this database. Open the access control list and switch to tab "Advanced". Here you can specify the "Maximum Internet name and password". By choosing "No Access" you can disable the web interface of GeoCom® Helpdesk.

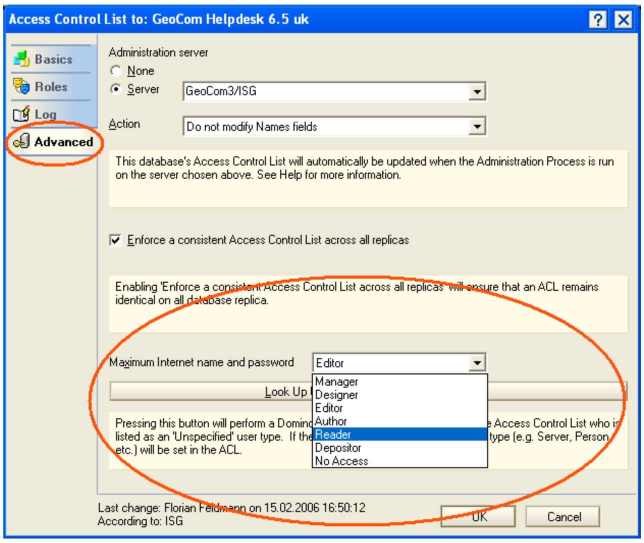


Illustration: ACL, Advanced, Maximum Internet name and password

4.4 Action "Logout" (web browser)

When a Helpdesk staff member temporarily leaves his workplace he can perform a logout from the server to secure his computer against unauthorized access.

Within the Notes client, select from menu:

File – Security – Lock display

Alternatively you can also use the key "F5".

Using the web browser interface, Helpdesk staff members can use the menu option "Logout" to disconnect their session with the Notes server.

After logout has been performed you will see a special logout page with the possibility to re-login to the server.

In order to be able to see this page without valid Notes identification, you have to add an entry with the name "Anonymous" to the ACL. This ACL entry should be set to "no access" without any roles, but be sure to activate the option "Read public documents".

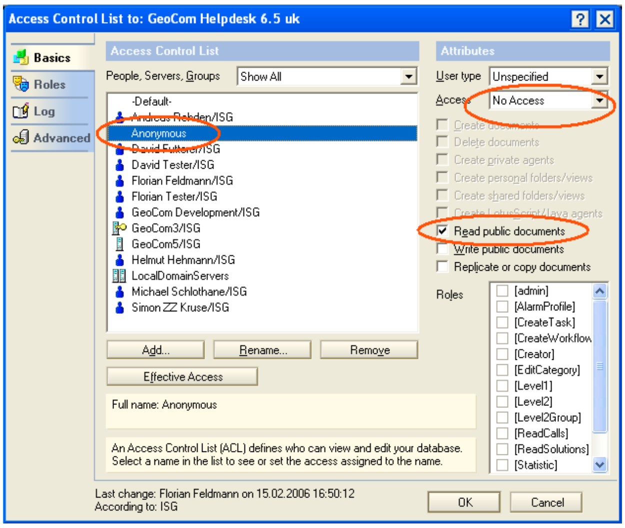


Illustration: ACL entry "Anonymous"

4.5 Access to standard solutions only

The database can now be configured in a way that allows certain users to read standard solutions but not to use any other Helpdesk functions.

For these users "Reader" access should be granted along with the role [ReadSolution].

☛ **INFO:** See also section 5.10 about releasing standard solutions for users.

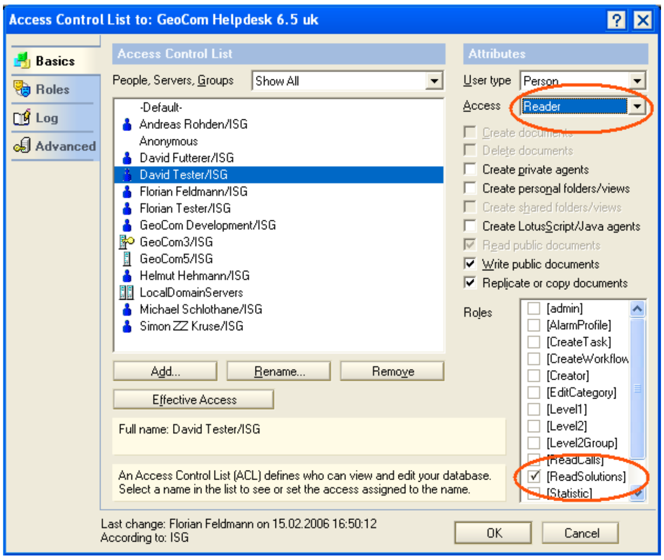


Illustration: ACL entry "Reader standard solutions"

5 General enhancements

5.1 Consistent colouring

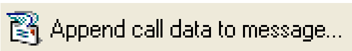
The colouring layout of the application has been reworked.

Background, heading in views, icon bars and icon backgrounds have been adapted to a consistent colouring scheme all over the database and do no longer use system colours.

5.2 Reply to calls: Append call data to message

Upon creating an answer to a Helpdesk call you can now use the action "Append call data to message".

The button "Answer" (either from an opened call or from any view containing calls) will create a new e-mail. If the originator's e-mail address has been specified within the call, the address will automatically be adopted into the new message.



In an open e-mail document you will see the button "Append call data to message". This button can be used to adopt specific call data into the mail's body field.

After activating this button the dialog "Show call as report" will open (this dialog will also be opened if you use the Helpdesk action of the same name from within an opened call document). In this case, however, the selected data will not be inserted into a new report document, but into the body field of the e-mail reply.

Select all fields of the call you want to adopt into the mail.

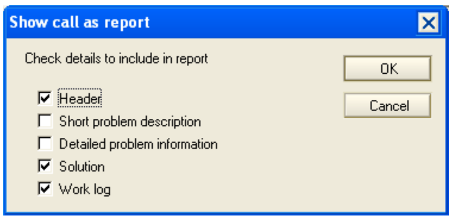


Illustration: Dialog Show call as report

5.3 Helpdesk call form: New field "Object"

Within the extended call form for Helpdesk members there is a new selection field "Object" in section "Classification".

The selection list for this field can be defined within the global configuration. Adding entries at runtime is not possible.

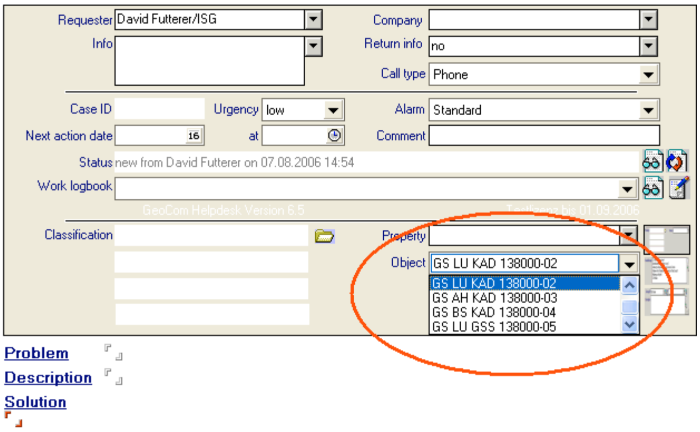


Illustration: Call form with selection field "Object"

5.3.1 Predefine list

The field "Classification – Object selection list" within the global configuration document can be used to define the selection list for this field. At runtime, one of the defined entries can be selected.

5.3.2 Get list from external database

In alternative to a predefined list you can also specify an external database from which list entries should be fetched and provided for the selection field.

Enter server name, database name, view and column from which you want to read the data within the field "Classification – Object selection list formula".

Upon usage of this method, an additional button will appear within the call form. With this button Helpdesk members can automatically open the selected document from the external database.

5.4 Alarm profiles: Form structure renewed

The section "Action" from within alarm definitions has been reworked. The fields have been rearranged to ensure better clearness of structure within this section.

Illustration: Form Alarm definition, section Action

5.5 Alarm profiles: AlarmBody is now RTF

The body field of e-mails generated by alarm profiles is now an RTF field. Thus, arbitrarily formatted text, images and file attachments can be inserted into this field.

5.6 Alarm profiles: New checking condition "after confirmation"

Upon defining alarm profiles a new option is available within section "Checking this alarm definition".

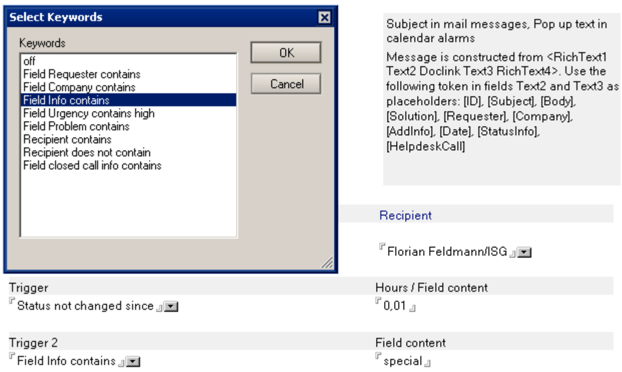
The selection "immediately after status modification after confirmation" will result in opening a confirmation dialog upon saving a document with this alarm profile. If this dialog is confirmed with "Yes" the corresponding alarm e-mail will be generated and sent.

5.7 Alarm profiles: Additional trigger for "Status not changed since"

The trigger "Status not changed since" can now be combined with another trigger condition:

If "Status not changed since" has been selected as trigger another selection field "Trigger 2" will appear. With this field an additional triggering condition can be specified.

Set this field to "off" in order to not use an additional condition check.



Ilustration: Selection field "Trigger 2"

5.8 Alarm profiles: New trigger "Field closed call info contains"

The trigger options have been extended by the value "Field closed call info contains". This can be used to check the field "Final status of calls" for certain patterns.

The list of final call states can be edited within the global configuration.

5.9 Re-Submission

The action "Show personal re-submission entries" has been removed from all views. Instead, tickler entries will be permanently shown in a special frame at the bottom of the screen, visible in all views.

refresh

Using the button "refresh" the list of tickler entries can be updated, e.g. when re-submission dates have been changed during call processing.

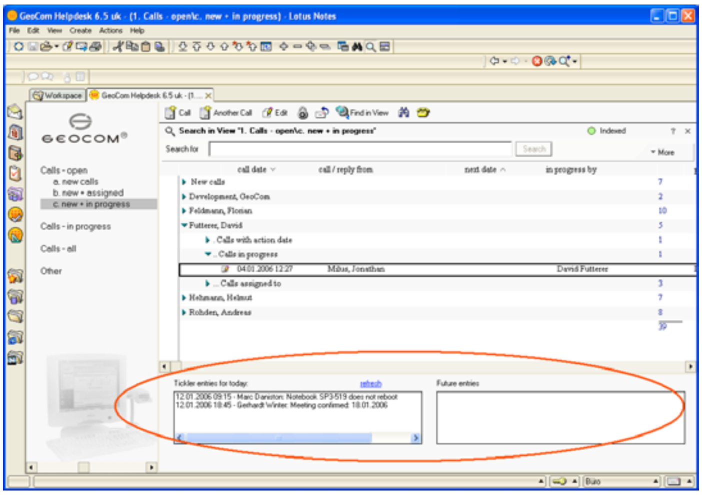


Illustration: View showing list of tickler entries

The option "Automatically show tickler entries within the next NN days" from the section "Settings for database start" thus became obsolete and has been removed from the personal configuration document.

5.10 Standard solutions: Release standard solutions for normal users

The role [ReadSolutions] will not grant full read access to all standard solutions anymore, but only to those solution documents which have been marked as "released".

To release a standard solution for normal users just activate the corresponding control box within the solution document. Documents in which this field is activated will be shown to all users disposing of the role [ReadSolution].

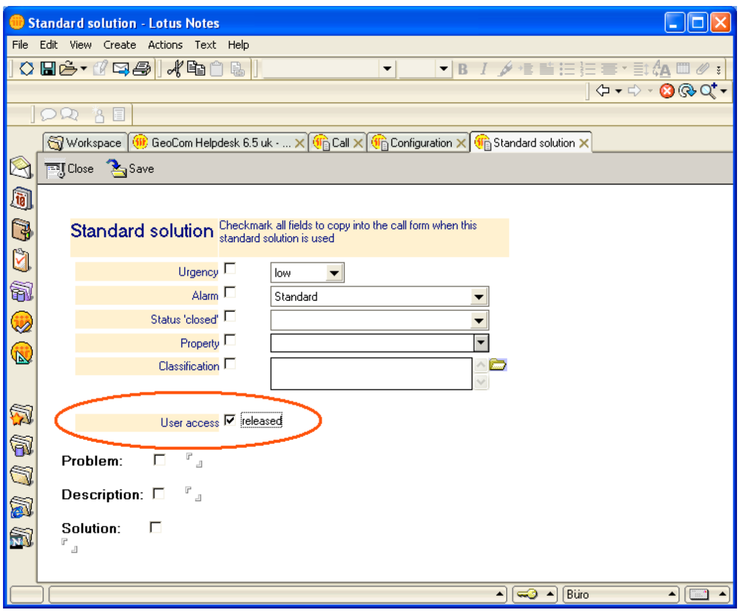


Illustration: Release standard solution for normal user access

5.11 Online status monitoring via Sametime

Via the application Sametime users can monitor the online status of Helpdesk staff members.

Thus, a user can see within the views, whether a specific Helpdesk staff member is logged in to the system at the moment, if both persons use the application Sametime.

5.12 Configurations (Backup)

Each time the global configuration document is saved, an additional backup copy will be placed in view "4. Other – Configurations (Backup)".

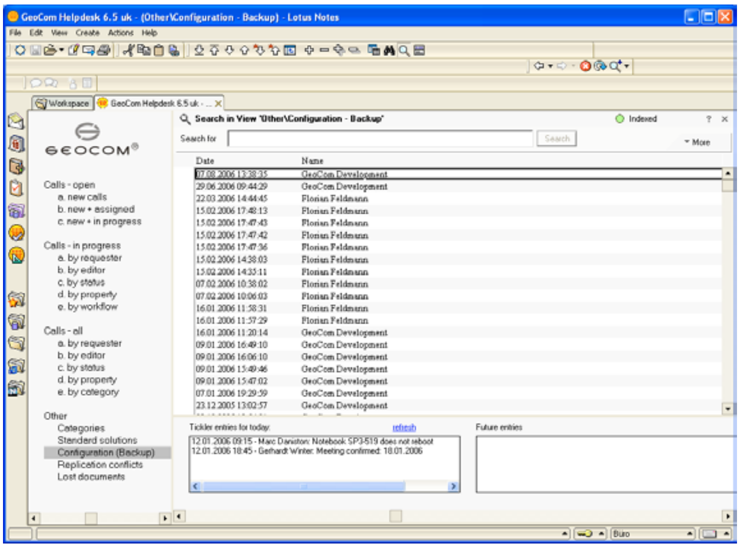


Illustration: View 4. Other – Configurations (Backup)

The view shows date and last editor (i.e. the Notes-ID with which the document has been saved) of all backup copies.

By double clicking one of the documents you can open it in read mode. Backup documents will look the same as global configuration documents with the exception of being not editable. In order to restore a backup copy open it and select from menu:

Actions – Admin – Restore configuration from backup

If you confirm the following dialog with "Yes" the current configuration will be overwritten with the data from the selected backup copy.

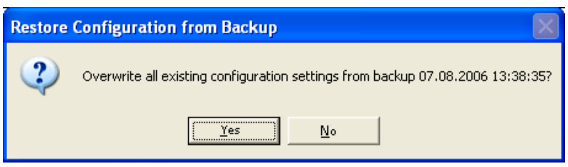


Illustration: Dialog Restore Configuration from Backup

6 Global Configuration

Also some changes have been made to the global configuration document. Thus, an administrator has to check the configuration after updating and if needed has to add missing information.

6.1 Call assigning

The section "Call assigning" now contains three instead of only two subsections.

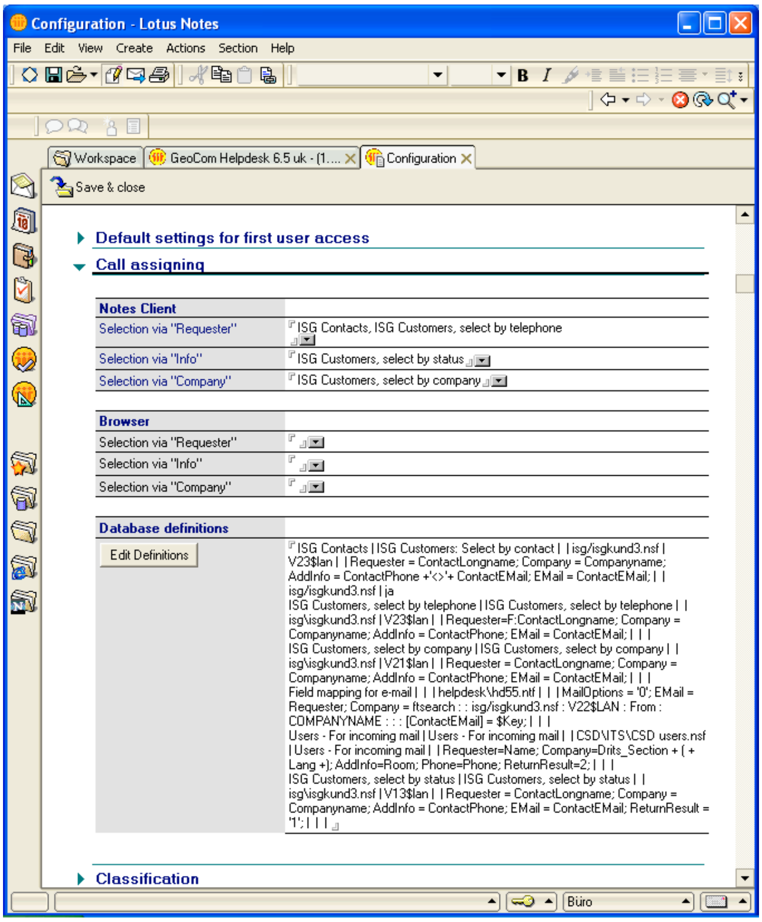


Illustration: Configuration, section Call assigning

The section "Database definitions" has not been altered. Defining the connection of external databases and fields is done as before.

The subsection "Database selection", however, has been split up into two subsections "Notes Client" and "Browser". Thus, the fields "Requester", "Info" and "Company" can be provided with different selection lists for Notes client and web browser access.

6.2 Classification

The section "Classification" can now hold either a predefined list or a selection formula for the field "Object". See also 5.3, Helpdesk call form: New field "Object".

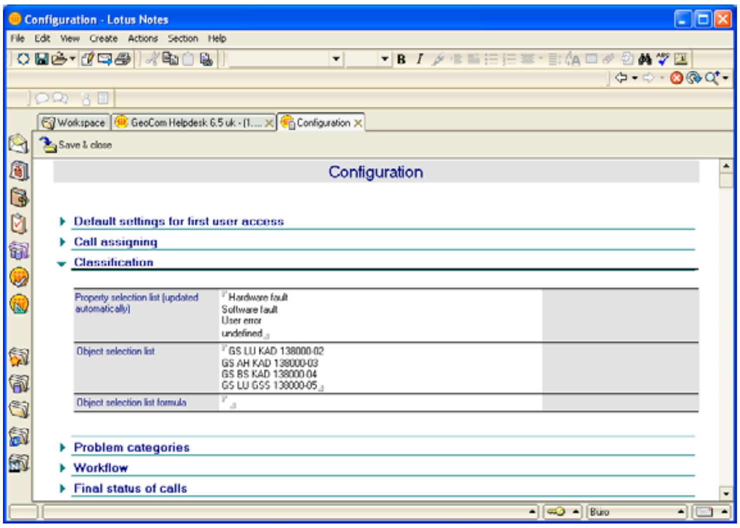


Illustration: Configuration, section Classification

6.3 Alarm

The section "Alarm" now contains a new field "Do not process documents created or modified before the modification date of the alarm profile".

This option is activated by Default after performing the update. It serves to suppress alarm notifications regarding past calls.

By using this option only those documents will be considered that were more recently modified or created than the last editing date of the alarm profile (or that have not yet been converted, in casse of incoming e-mails).

☛ **INFO:** Upon usage of this setting, changes to alarm profiles should only be performed by specially instructed personnel, as changes done to an alarm profile effectively disable alarm processing for all former calls underlying this alarm profile!

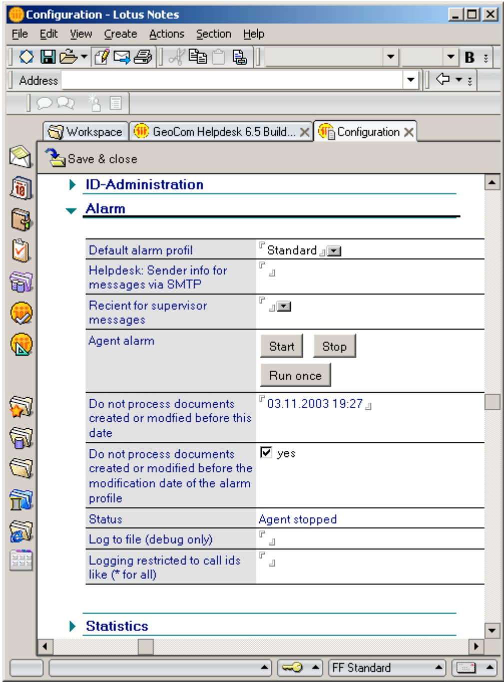


Illustration: Configuration, Section Alarm

6.4 Web-Interface Requester

The section "Web-Interface Requester" has been added to the global configuration document. Here you can specify the layout of the browser interface.

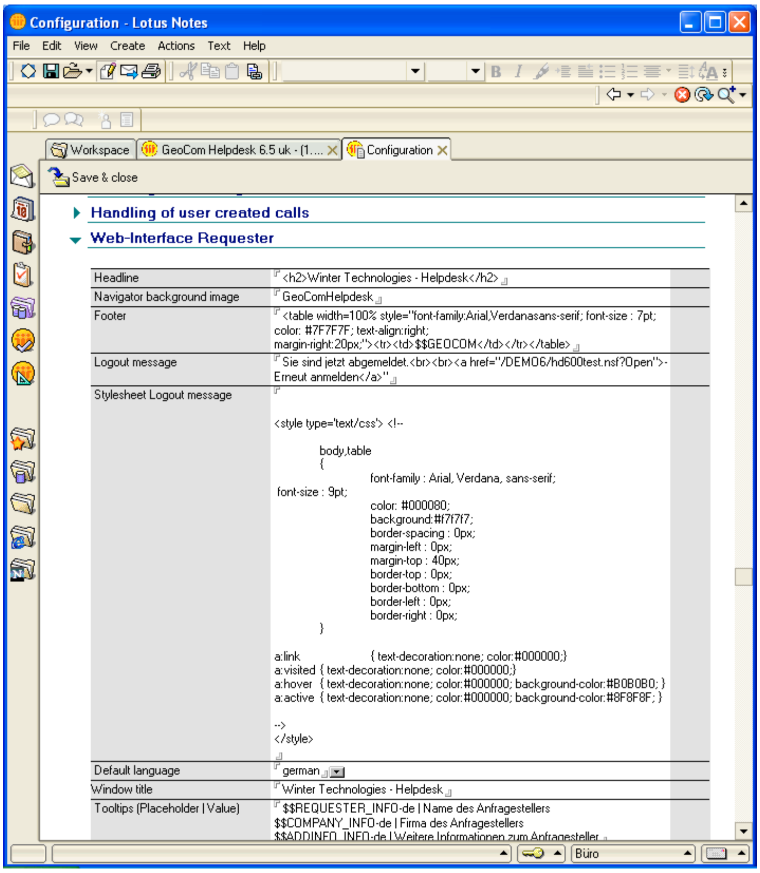


Illustration: Configuration, section Web-Interface Requester

Headline: Here you can specify an HTML formatted text or an image resource that should be used as headline within the browser interface.

Navigator background image: Enter the name of an image resource that should be used as background image for the application (also applies to Notes client).

Footer: Specify HTML code that is to be used as footline for browser layout.

Logout message: You can define an HTML message that should be shown after a web user has used the logout option.

Stylesheet Logout message: Enter a style sheet definition that should be applied to the logout message.

Default language: Select whether the English or German user interface should be loaded by default in case no personal configuration document is available.

Window title: Here you can enter a title for the browser window the application is shown in.

Tooltips: Note a list with tooltip definitions for usage within the web browser interface here. Specify one definition per line. Tooltips have to be of the following form:

Placeholder | *Value*

7 Bug fixes

7.1 Call form: Wrong worklog entry shown

Within the extended call form for Helpdesk members the first worklog entry had been shown by default instead of the latest one.

This error has been fixed, upon opening the form the latest worklog entry will now be shown first.

7.2 Display format for >10 worklog entries corrected

Formatting of worklog entries has not been properly displayed when more than 10 entries were specified.

This error has been fixed.

7.3 Error message for worklog entry (uk) now in English

Within the English user interface a German error message has been shown upon missing work time entries.

This error has been fixed, the message has been properly translated.

7.4 Refresh folder "Lost documents"

Due to an incorrect function call the action "Refresh folder" needed immense amounts of CPU time.

The function call has been corrected, the action now performs faster.

7.5 Default knowledge database

Due to an error during handling of personal configuration settings the setting for the default knowledge base has not been factored in.

This error has been fixed, the database selected within the personal configuration will now be preselected upon opening calls.

7.6 Alarms only entered correctly into mail files when using R5

Alarms could only be entered into mail files using R5 templates.

Now the template name of the mail file is checked for "R5". If this substring is found, the old scheme for entering alarm profiles will be used.

In all other cases the application assumes usage of an R6 template file and uses the according R6 mechanisms for entering alarms.

7.7 Entry for personal configuration of alarms not included

If a Helpdesk task member tried to create an alarm entry for himself, the entry "Name of mail database for personal alarms" from within the personal configuration document has been ignored.

This error has been fixed.

7.8 Performance of agent "Convert New Mails"

The performance of the agent “Convert New Mails“ has been improved. The agent now selects candidates for converting already from the underlying view.

7.9 "Fast close call" erroneous in version 652

In version 652 an error occured upon using the button "Fast close call":

This error has been fixed.

7.10 Sending of replies erroneous

An error in version 652 prohibited adoption of fields from the call when making a reply (neither using the corresponding action from Notes client nor automatically via web interface).

Further, all user input has been cancelled upon sending the mail. Only an empty mail has been sent.

Both errors have been fixed, using the reply function from within the application now works as planned.