

CHAPTER 1

INTRODUCTION TO SDS HELPDESK

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CHAPTER 1 -- Introduction

Welcome

Welcome to the SDS HelpDesk. This program has been designed to improve your company's ability to provide high quality support and service to your customers. Customers call when they find they cannot proceed with their work until they get an answer from you. They may have a problem, a question, a broken piece of equipment, or even a leaky faucet. No matter what the issue is, your customer's efficiency becomes dependent upon your ability to resolve it.

SDS HelpDesk supplies all the tools you need. It is a full-featured program that simplifies the gathering of information. More importantly, it then manages and tracks all aspects needed to resolve the issue. The program is organized into six modules, which all work together and share information. Each module lets you see everything you need on one screen. The modules include Issue Manager, Address Book, Service Contracts, Scheduler, Report Manager, and Lookup Tables.

How SDS HelpDesk Helps Your Customers

Your customers may be external clients, other employees in your organization, tenants in a building you manage, or outside contractors. When customers contact you for assistance, they expect you to be knowledgeable and responsive.

Since the same information is available to all HelpDesk users in real time, customers don't have to repeat the reason for their call to numerous people. If your customers are also SDS HelpDesk users, they can send their request directly to the support professional they have dealt with before.

The built-in search engine lets you get to customer information easily from any module. Customers don't have to remember their service contract number or issue code numbers.

How SDS HelpDesk Helps You

As a support professional, you need to be able to respond to your customers quickly and efficiently. With SDS HelpDesk, customer information is always at your fingertips. From Issue Manager, you can see whether a customer's service contract is valid, view a list of all issues for that customer, and see the customer's name, company, and phone number in the status bar.

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How SDS HelpDesk Helps You (cont'd)

The same issue history is available to all HelpDesk users in real time. Need the assistance of other members of your organization or an outside contractor to resolve an issue? Just add them to your issue work group, and then use the messaging system as a forum for discussion. The messaging system also lets you know immediately if another work group member needs your assistance with an issue.

The knowledge base helps provide answers to repeat issues. The knowledge base can include step-by-step instructions, scripts, system configuration information, or just about anything else that might be useful to you. You can search the knowledge base by issue category, location, condition, status, priority, organization, keywords, or dates.

The Scheduler lets you post a reminder whenever you need to follow up with a customer.

Features and Benefits at a Glance

KEY FEATURES	BENEFITS
Full-featured Program	SDS HelpDesk comes with all the central features you need to provide high quality support and service to your customers. Installation is easy whether you want to use it in a single- or multi-user environment.
Customization	Whether you provide customer support for a product, facilities management, or internal MIS, SDS HelpDesk can be customized to fit your needs. You can define your own categories, subcategories, issue locations and labels, priorities, statuses, etc.
Active Labels	Single-click on certain drop down box labels to open a PickList of current items in the database. Right-click on the same label to open the corresponding Lookup Table. Click on italicized labels to launch context-sensitive help.

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Features and Benefits (cont'd)

KEY FEATURES	BENEFITS
Tree View	Category, Location, Organization, and Condition Lookup Tables are displayed in a tree-like format. This format enables you to view the hierarchy of your multi-level data.
Flexible Data Entry	Allows users to choose the method that is the most efficient or comfortable for their needs.
On-the-fly Data Entry	You can start using the program, then add new information, as you need it directly from the module where you are working.
Issue Logging and Tracking	Use the Issue Manager module whenever you talk with a customer. Your productivity increases since you can see and do a lot of things from one screen. You can record new issues, track their progress to resolution, see a history of the issue, attach supporting files, add resolved issues to the knowledge base, and use the messaging system to communicate with work group members.
Issue History	All key actions taken with an issue are recorded. These include when it was opened, who entered it, status changes, escalations, and priority changes. Each item is date stamped, and the person taking the action is noted. You save time since you will know in real time whenever action is taken on an issue and by whom.
Issue Work Groups	You may not always be able to resolve an issue by yourself. With issue work groups, you can find just the right people with the specific expertise you need to help you resolve an issue.
Attach Supporting Files	Supporting files such as word processing documents, CAD drawings, faxes, or anything else that ends up in a file, can be attached to any issue. You can view supporting files directly from Issue Manager. This feature eliminates your having to hand enter backup information.

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Features and Benefits at a Glance (cont'd)

KEY FEATURES	BENEFITS
Knowledge Base	The knowledge base gives you the solutions to repeat issues. It can be used for step-by-step instructions, how-to information, lists of parts, tools or materials needed to do a job, or just about anything else desired. The knowledge base can be preloaded with information or built up over time as issues are entered and resolved.
Search Engine	The powerful search engine quickly scans for solutions and information. Search criteria can be as broad or narrow as desired. You can search on issue categories, locations, conditions, status, priority, organizations, keywords, and dates.
Address Book Manager	Enables you to keep all of your contact information in one place. This can include customers, employees, vendors, etc. Once skills are assigned, you can use the search engine to find individuals or organizations that have the right skills and know-how to help you resolve an issue.
Skill-based Routing	Your support professionals, employees, and outside contractors each have different skills, expertise, or knowledge. Once skills are assigned, you can use the search engine to find individuals with just the right skills and know-how to help resolve an issue.
Service Contract Manager	You no longer have to guess if a customer has support. Service Contract Manager verifies that a contract is still valid and alerts you through Issue Manager. You can access contract details directly from Issue Manager.
Scheduler	The Scheduler module lets you post follow-up reminders. You can schedule the date, time, customer, and notes about what is to be discussed.

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Features and Benefits at a Glance (cont'd)

KEY FEATURES	BENEFITS
Lookup Tables	Lookup Tables are used to create, maintain, and standardize commonly used information. The information entered in Lookup Tables is used in the PickLists and drop down lists. Lookup Tables help you save time, avoid typing errors, and ensure high quality data entry.
Merge Duplicates	With multiple users, you may find slightly different entries being made for the same name or item. The merge duplicates feature lets your system administrator combine the information for similar items into one record. You don't lose any of the data, and you don't have to reenter information.
Reports	Two kinds of reports are available depending on the information you want to see. If you just want to print out information for a currently selected record, you can use a SnapShot Report. Use an ExecReport when you need to print out details for groups of records.
Customizable Workstation Fonts	User screens don't all have to look the same. Each user can change font style, size and color.
Security <ul style="list-style-type: none">• Password Protection• User Permissions• User Logons	Password protection ensures that only authorized users have access to SDS HelpDesk. Certain administrative permissions can be given to specific users. This not only provides backup support for the system administrator, but also protects certain key tables. At any time, the system administrator can see who is logged on, and make adjustments if needed. This is very important if you need to trade off users.
Export Capability	You can easily export the database information, in text format, to other databases or applications.

CHAPTER 1 -- Introduction

What You Need to Know Before Getting Started

This manual assumes that you are familiar with standard Windows terminology and concepts. If you are not, refer to your Windows manual for additional help.

Documentation Standards

The conventions used in this manual have been established to help you learn to use SDS HelpDesk quickly and easily. These conventions conform, as much as possible, to those found in other Windows documentation. The following is a summary of the conventions used throughout this manual:

Convention	Meaning
Click	Click the left mouse button once.
Double-click	Click the left mouse button twice, fast.
Right-click	Click the right mouse button once.
Select	Double-click on an item to highlight it.
Press Key + Key	Hold down the first key and press the second key (e.g., ALT + A).
Menu Names and Options	Printed in bold type.
Dialog Box Names	Begin with uppercase letters.
Record	Related pieces of information. An example is an organization and the information related to it such as contacts, issues, and service contracts.
Field	A category of information such as name.

About This User Guide

The User Guide describes how to install and use all the features of SDS HelpDesk. The chapters are presented in a build-upon sequence to get you up and running quickly.

Chapter 1: Introduction to SDS HelpDesk

Describes the key features of SDS HelpDesk. Includes contact information for Scott Data Systems.

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About This User Guide (cont'd)

Chapter 2: Installation

Summarizes the hardware and software requirements for SDS HelpDesk, and describes how to install and start the program. It also contains information about your HelpDesk license code and user logons.

Chapter 3: Getting to Know SDS HelpDesk

Provides information about the SDS HelpDesk window, the main menu, and the toolbar. It also includes information on how to use PickLists, and how to recognize mandatory fields.

Chapter 4 - Implementation Checklist

Describes the recommended stages for implementing SDS HelpDesk, and provides a setup checklist for your convenience.

Chapter 5 - Setting Up HelpDesk

Details what the system administrator needs to set up. It also describes how users can customize their workstation font colors, change their password, and enable or disable the prompt message when adding data on-the-fly.

Chapter 6 - Lookup Tables

Describes how to create Lookup Tables. Lookup Tables classify similar information together and are used for quick data entry. The information entered in Lookup Tables is used in the PickLists and drop down lists throughout SDS HelpDesk.

Chapter 7 - Address Book Manager

Explains how to enter information about the contacts you may work with, provide assistance to, or ask assistance from. Contacts may include users, employees, customers, contractors, tenants, vendors, etc.

Chapter 8 - Service Contract Manager

Details how to set up customer service contracts. Contracts can be set up for different service levels, different time durations, or on a per incident basis.

Chapter 9 - Issue Manager

This chapter is the heart of SDS HelpDesk. Describes how to categorize and document customer issues and their resolution. Details how to set up issue work groups that are responsible for resolving an issue. Explains how to set up and add information to the knowledge base.

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About This User Guide (cont'd)

Chapter 10 - Scheduler

Describes how to set up reminders for follow-up items.

Chapter 11 - Report Manager

Explains how to rename, add, preview, and generate reports detailing key information about contacts, issues, organizations, service contracts, Lookup Tables, etc.

Glossary

Lists and defines terms used in SDS Helpdesk.

Getting Help

While SDS HelpDesk has been designed to be intuitive and easy to use, the following resources are available should you need additional assistance.

Online Help

Help provides reference and "How to" information for all HelpDesk tasks. You can jump from one Help topic to related topics. To start Help, press F1 or choose **Help** from the main menu.

Context-sensitive Help is also available. Click an italicized label in a module or dialog box to display the relevant help information.

Contacting Scott Data Systems

Website: www.ScottDataSystems.com