Click this button to close the About... box.

Use this box to add additional notes or comments to an issue's history.   ***EXAMPLE:***   This issue was escalated to Sue since she is an expert in PC operating systems.

Click the **Exit** button to close the dialog box and save your comments.

Type your message to other Issue Work Group members in this box.

Click the **Exit** button to close the dialog box, save your message, and send it to Issue Work Group members.

Click the **Exit** button to close the dialog box and save your entry.

Once the other fields have been entered, click the **Connect** button to connect to the Server.

This is the network computer that you can logon to.   It is also the computer where the database is kept.   Enter the Server name in this box.

When a connection is made with the Server, this box is **green** and displays "CONNECTED."   Otherwise, it is **red** and displays "NOT CONNECTED."

This is a four-part number separated by periods (example: 142.116.255.1) that uniquely identifies a computer on the Internet. The Internet needs these numeric addresses to send information between computers.

Enter the User Name the system administrator uses to logon to the Server in this box.

Enter the password the system administrator uses to logon to the Server in this box.

Enter your input in this field.

Enter your input in this field.

Click the **Defaults** button to reset the client/server connection to what it was when SDS Enterprise was first installed.

Select this radio button if both the Client and Server programs were installed on the same computer.

Select this radio button if the Server program has been installed on a different computer.

Select this radio button if the Server must be accessed using the Internet.

Click the **Disconnect** button to disconnect from the Server.

Enter the Server license number in this box.

If you change any of the information in this dialog box, click the **Update** button to save your changes.

Click the **Clear** button to clear all fields and give you a blank screen.

Click this button to make your choice.

Click the **Test** button to preview how the format settings of your contract numbers willl look.   The results of the test will be displayed in the Sample Contract # field.

Click the **Save** button to save the contract number format settings.

Click the **Exit** button to close the Customize Contracts dialog box.

Enter the sequence of where you want the time to appear in the contract number.
EXAMPLE: If you want it as the third item in the sequence, enter a 3 in this box.

Enter the sequence of where you want the date to appear in the contract number.

EXAMPLE 1:   If you want all contract numbers to begin with the date, enter a 1 in this box.

EXAMPLE 2:   If you have fixed text in sequence 1 and want the date to follow, enter a 2 in this box.

If you want the time included in all contract numbers, enter the format here.
EXAMPLE: hr/min/sec.   When a new contract is entered, the current time is used.

If you want the date included in all contract numbers, enter the format here.
EXAMPLE: mm/dd/yyyy.   When a new contract is entered, the current date is used.

Enter your input in this field.

Enter your input in this field.

Enter the sequence   of where you want this text to appear in the contract number.
EXAMPLE: If you want this text to appear directly after CON, enter a 2 in this box.

Enter the sequence of where you want this text to appear in the contract number.
EXAMPLE: If you want all contract numbers to begin with CON-, enter a 1 in this box.

If you want a second set of text to appear in all service contract numbers, enter it here.

EXAMPLE: If all of your contract numbers should also contain the text 01, representing an issuing department, type it in the Text2 field.   Include a hyphen (i.e., 01-)   if you want to separate it from other portions of the contract number.

If you want the same text to appear in all service contract numbers, enter it here.

EXAMPLE: Let's say you want all of your contract numbers to start with CON.   Type it in the Text1 field.   Iinclude a hyphen (i.e., CON-)   if you want to separate it from other portions of the contract number.

The Sample Contract # field displays the results of the preview test.

If you want your contract numbers incremented automatically, enter the starting number here.

Enter an ending number here.   **EXAMPLE**:   If you think you will have a significant number of service contracts, enter 999999.

Enter a value to be used to increment the number.
EXAMPLE: If the numbers should increment by 1, enter that value here.

Enter your input in this field.

Enter your input in this field.

Select this radio button if you want to set a custom format for service contract numbers.

Select this radio button to format service contract numbers using the text in the contract notes field.

EXAMPLE: You may have existing contract numbers that you want to continue using.   Enter the number in the notes field in the Service Contract module.   It will be used as the service contract number in SDS Enterprise.

Select this radio button to format service contract numbers using the text in the contract field.

Select this radio button to format service contract numbers using the text in the contract field.

Select this radio button to format service contract numbers using the text in the contract notes field.

EXAMPLE: You may have existing contract numbers that you want to continue using.   Enter thes number in the notes field in the Service Contract module.   It will be used as the service contract number in SDS Enterprise.

Select your preferred option.

Select this radio button if you want to set a custom format for service contract numbers.

Enter the sequence of where you want the incrementing number to appear in the contract number.
EXAMPLE: If your contract numbers to begin with CON-, enter a 1 in this box.

Enter the counter number format in this field.
EXAMPLE: If you want four leading zeros before the counter number, enter 0000.

Enter a value to be used to increment the number.
EXAMPLE: If the numbers should increment by 1, enter that value here.

Enter an ending number here.   **EXAMPLE**:   If you think you will have a significant number of service contracts, enter 999999.

If you want your contract numbers incremented automatically, enter the starting number here.

The Sample Issue # field displays the results of the preview test.

If you want the same text to appear in all service contract numbers, enter it here.
EXAMPLE: Let's say you want all of your contract numbers to start with CON.   Type it in the Text1 field.   Iinclude a hyphen (i.e., CON-)   if you want to separate it from other portions of the contract number.

If you want a second set of text to appear in all service contract numbers, enter it here.   *EXAMPLE*:   If all of your contract numbers should also contain the text 01, representing an issuing department, type it in the Text2 field.   Include a hyphen (i.e., 01-)   if you want to separate it from other portions of the contract number.

Enter the sequence number of where you want this text to appear in the contract number.
EXAMPLE: If you want all contract numbers to begin with CON-, enter a 1 in this box.

Enter the sequence number of where you want this text to appear in the contract number.
EXAMPLE: If you want all contract numbers to begin with CON-, enter a 1 in this box.

Enter your input in this field.

Enter the sequence of where you want this text to appear in the contract number.
EXAMPLE: If you want all contract numbers to begin with CON-, enter a 1 in this box.

If you want the date included in all issue numbers, enter the format here.   **EXAMPLE**:   mmddyyyy.   When a new issue is entered, the current date is used.

Enter your input in this field.

Enter the sequence of where you want this text to appear in the contract number.
EXAMPLE: If you want all contract numbers to begin with CON-, enter a 1 in this box.

Enter the sequence of where you want this text to appear in the contract number.
EXAMPLE: If you want all contract numbers to begin with CON-, enter a 1 in this box.

Click the **Clear** button to clear all fields and give you a blank screen.

Click this button to make your choice.

Click the **Test** button to preview how the format settings of your issue numbers willl look.   The results of the test will be displayed in the Sample Issue # field.

Click the **Save** button to save the issue number format settings.

Click the **Exit** button to close the Customize Issues dialog box.

This field shows a complete history of all the actions taken, or progress made on a particular issue. SDS Enterprise automatically adds certain information to this history as it happens (i.e.., change in status, change in priority, escalations, etc.). Other information can be added manually by clicking on the Add button.

Click this button to close the Incident History dialog box.

Click this button to add new information to the Incident History log.

Click this button to get a printout of the complete history of a particular issue.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Enter your input in this field.

Choose an item from the list.

Enter your input in this field.

Enter your input in this field.

Enter your input in this field.

Enter your input in this field.

Choose an item from the list.

Choose an item from the list.

Choose an item from the list.

Choose an item from the list.

Choose an item from the list.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Use this field to enter any addition information you want to maintain for this issue.

Click this button to close the Incident Memorandum dialog box.

Click this button to add new comments or notes to this issue.

Click this button to get a printout of the complete issue memorandum.

Select the name of the report you want to preview or print from this list.   Then click either the Preview button or the Print button.

Enter the name of the report you want to add or edit here.

Select the first report filter, if you want to use one, from the drop down list.   Use filters to define *what* data you want to include in your report.   If all filters are left blank, all applicable data will be included in the report.

Select the second report filter, if you want to use one, from the drop down list.   Use filters to define *what* data you want to include in your report.   If all filters are left blank, all applicable data will be included in the report.

Select the third report filter, if you want to use one, from the drop down list. Use filters to define *what* data you want to include in your report. If all filters are left blank, all applicable data will be included in the report.

Click this button to close the Report Manager dialog box.

Click this button to clear the filters and report fields.

Click this button to add a new report to the Available Reports list.

Click this button to save any changes you make to a report name.

Click this button to delete a report from the Available Reports list.

Click this button to print the report you selected.

Click this button to preview the report you selected before printing.

After selecting a report from the Available Reports list, click this button to edit the name of the report. The current report name will appear in the Report field. Make any changes you want to the name, then click the Update button to save the changes.

A list of potential members of an issue's Work Group.   You can add the person to the Work Group by selecting their name, then clicking the Add button.

This box lists all users or contacts who have been added to this issue's Work Group.   Additional members can be added by clicking the Add button.

Select a Contact Type from the drop down list to narrow the list of potential Work Group members.

Select a Skill from the drop down list to narrow the list of potential Work Group members.

Click this button to close the Incident Work Group dialog box.

Click this button to add a new user to the Work Group.

Click this button to delete the selected user from the Work Group.

Click this button to add information to the Issue Memorandum.

This box will be **green** if the service contract is currently in effect.   It will be **red** if the service contract has expired or is no longer valid.

Enter the number of issues that have been handled thus far in this field.

Click this button to increase the total number of used issues by one.

Click this button to decrease the total number of used issues by one.

Enter the name of the person who canceled the service contract, if known, here.

Enter the date the service contract was canceled in this field.

Use this field to enter any comments or notes you want to keep with this service contract.

Depending on what you selected in the Duration field, SDS Enterprise will calculate the service contract end date for you.

Enter the date the service contract is to start in this field.

Select the organization from the drop down list.

Select the appropriate service contract number from the drop down list.

Choose the service level from the drop down list.

Select the duration of the service contract from the drop down list (i.e.., annual, semi-annual, 30 days, etc.)

If this is a Per Incident contract, select the maximum number of new issues from the drop down list that are covered.

Click this button to close the Service Contract module.

Click this button to clear all the fields and give you a blank screen.

Click this button to add a new service contract.

Click this button to save any changes you make to an existing service contract.

Click this button to delete a specific service contract.

Click this button to print a report for this service contract.

Click this button to find the service contracts that meet the criteria you specify (i.e.., for a particular organization, having a certain duration, etc) .

Click this button if you want to edit information for an existing service contract.   Once the information has been changed, click the Update button to save the modifications.

All of the user's follow-up items will be shown in this field.   Select any item to see the details.

This field will show the name of the current user.

Use this field to enter any notes about what the follow-up should be (i.e.., Call Mr. X to find out who from his organization will be attending the next training class).

The date you selected using the calendar will show in this field.   You can edit it if necessary.

Select this radio button if the follow-up is to occur in the morning.

Select this radio button if the follow-up is to occur in the afternoon or evening.

Select the organization for this follow-up item from the drop down list.

Select the contact name from the drop down list.

Choose the hour from the drop down list when you should start this follow-up item .

Choose the minutes from the drop down list when you should start this follow-up item .

Use the calendar to select the date a follow-up item is to be done.   Select the month and year from the drop down lists, then click the appropriate day on the calendar.

Click this button to close the Tickler module.

Click this button to clear the fields and give you a blank screen.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Check this box if the user has permission to add, change, or delete reports that are used throughout SDS Enterprise.

Check this box if the user has permission to add and/or change information in Lookup Tables.   Lookup Tables are used to set up initial categories and subcategories of information you want to track.   They are also used to enter organization names, skills, etc.

Check this box if the user has permission to act as the program Administrator. ***NOTE:*** This permission should be limited to a small number of people.

The contact's user name.   A user name can be initials, an initial and first or last name,   etc.

The user's password.   It will appear as asterisks.   Be sure to keep a secure backup list should a user forget his/her password.

This field shows a list of all users.   Select a user name to see their permissions.

This field lists the users who meet the criteria you set in one or both of the above boxes.

Select a contact type from the drop down list to see the users who match this criteria.

Select a skill from the drop down list to see the users who match this criteria.

Click this button to close the User Manager dialog box.

Click this button to clear the fields and give you a blank screen.

Click this button to add users and set permissions.

Click this button to save any changes you make to existing user records.

Click this button to delete a specific user.

Click this button to print a report that highlights user information.

Click this button to find users who meet criteria you specify.

Click the **Change** button to save the new path to the Help File location.   You need to change the path if the file is ever moved.

Click the **Exit** button to close the Help File Location dialog box.

Enter the complete path in this field   to the location of the Help file.   If the file is ever moved, enter the new path here and then click the **Change** button.

Click this button to make your choice.

Click this button to make your choice.

Choose an item from the list.

Click the **Change** button to customize or change the four user defined labels.   These labels are used in the Issue Manager module.

Click the **Exit** button to close the Help Desk Customization dialog box.

Type in the new label text here.   After you click the **Change** button, this text will replace the Loc1 label in the Issue Manager module.

Type in the new label text here.   After you click the **Change** button, this text will replace the Loc2 label in the Issue Manager module.

Type in the new label text here.   After you click the **Change** button, this text will replace the Loc3 label in the Issue Manager module.

Type in the new label text here.   After you click the **Change** button, this text will replace the Loc4 label in the Issue Manager module.

Click the **Exit** button to close the Report Files Location dialog box.

Click the **Change** button to save the new path to the location of the Report files.   You need to do this if the files are ever moved.

Enter the complete path in this field   to the location of the Report files.   If the files are ever moved, enter the new path here and then click the **Change** button.

Click this button to delete issues that you are finished with. **This only deletes issues from your review list, not from the Issue Manager module.**

This box is **green** and displays "New" when you have new issues, or issues that you have not yet reviewed.   It is **red** when you have no new issues, or when you have reviewed all of your issues.

The drop down list contains issues that have been sent to you by another user for your review, comments, suggests, etc.   Select an issue from the list to see its details.

Click this button to open the Address Book module.

Click this button to open the Service Contracts module.

Click this button to open the Reports module.

Click this button to open Lookup Tables.

Click this button to open the Tickler module.

Click this button to open the Issue Manager module.

Click this button to connect to your Server.   You need to do this, even if you installed all of the program files onto your local PC. This lets you access the   database.

When you are connected to your Server, this box is **green**.   It is **red** when you are not connected to your Server.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Choose an item from the list.

Choose an item from the list.

Choose an item from the list.

Choose an item from the list.

Choose an item from the list.

Choose an item from the list.

Choose an item from the list.

Enter your input in this field.

Choose an item from the list.

Choose an item from the list.

Choose an item from the list.

Click this button to make your choice.

Click this button to make your choice.

Choose an item from the list.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Enter your input in this field.

Enter your input in this field.

Choose an item from the list.

Click this button to make your choice.

Click this button to make your choice.

Enter your input in this field.

Enter your input in this field.

Enter your input in this field.

Enter your input in this field.

Choose an item from the list.

Click this button to make your choice.

Enter your input in this field.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Choose an item from the list.

Choose an item from the list.

Click this button to make your choice.

Choose an item from the list.

Choose an item from the list.

This box shows the number of contacts who meet specified criteria (e.g., are employees of a particular organization, are a certain contact type, have a specific skill).

Use this field to enter any unique number associated with the contact (e.g., employee ID, Social Security number).

Enter the contact's title in this field.

Choose the contact's organization from the drop down list.

TO ADD A NEW ORGANIZATION ON-THE-FLY:
- Type the name of the new organization in this field.
- Click the
 button.

Most contacts can be grouped depending on your relationship with them.   These "groups" are called Contact Types.   Choose a contact type for this person from the drop down list (e.g., customer, employee, tenant, contractor).

TO ADD A NEW CONTACT TYPE ON-THE-FLY:
- Type the new contact type category in this field.
- Click   the

button.

You can associate one or multiple skills with a contact by using the Skills drop down list.

STEPS:
- Select a skill from the Skills drop down list.
- Click the **Add** button.   The skill is added to the contact's skill list.
- Repeat the above steps for each skill you want to associate with the contact.

This button is used to associate a skill or expertise with a contact.   Contacts can have one or multiple skills associated with them.

STEPS:
- Select a skill from the Skills drop down list.
- Click the **Add** button.   The skill is added to the contact's skill list.
- Repeat the above steps for each skill you want to associate with the contact.

Click this button to delete a skill from the contact's skill list.

Enter the contact's primary phone number in this field.

Enter the contact's alternate phone number in this field (e.g., home, cell phone, etc.)

Enter any other needed phone number for the contact here.

Enter the contact's FAX number in this field.

Enter the contact's Email address in this field (e.g., cscott@ScottDataSystems.com).

Enter the contact's primary mailing address in this field.

Enter any secondary address for the contact here.   This field can be used for a suite number, post office box, etc.

Enter the city in this field.

Enter the zip code, or country code for international addresses, in this field.

Enter the country in this field.

Enter the department name or mail stop code in this field.

Enter the state's 2 character abbreviation in this field (e.g., CO).

Use this field to enter any comments or notes about the contact (e.g., special days or hours the contact is available, quality of service, etc).

If the contact is a contractor, enter his/her hourly billing rate in this field.

This box lists all of the skills associated with a contact.   The list is useful when you need to find individuals with the right know-how to resolve an issue.

Click the **Exit** button to close the Address Book module.

Click the **Clear** button to clear all of the fields and give you a blank form.

Use this button to add a new contact to the database.

STEPS:
- Type the name of the contact in the Full Name box.   Use the format first name, middle initial, last name (e.g., John Jones or John E. Jones).
- Select an organization from the Organization drop down list.   If it does not exist, type in the organization name, then click the ⊞ button to add it.
- Select a contact type from the Contact Type drop down list.   If it does not exist, type in the new contact type, then click the ⊞ button to add it.
- Type in the other information where needed for the new contact.
- Click the **Add** button.

The **Update** button is used to save changes made to existing contact information.

STEPS:

- Select the contact from the Full Name drop down list.   Begin typing the name and the program scrolls to the closest match.
- Click the **Edit** button.   This lets you modify the record.
- Make your changes.
- When finished, click the **Update** button to save your changes.

Click the **Delete** button to delete a contact.

Click the **Print** button to print a SnapShot Report that details information for the selected contact.
NOTE: If you want to print a report for all contacts or for a group of contacts, see the Report Manager module.

Click the **Find** button to search for contacts who meet the criteria you specify (e.g., have a certain skill, are a specific kind of contact, are employees of a particular organization).

NOTE: The number of contacts who match this search criteria is displayed in the Selection Size box.   Click on the Full Name drop down list to view the contacts.

The **Edit** button is used when you want to modify information for an existing contact.

STEPS:
- Select the contact from the Full Name drop down list.   Begin typing the name and the program scrolls to the closest match.
- Click the **Edit** button.   This lets you modify the record.
- Make your changes.
- When finished, click the **Update** button to save your changes.

Click this button to add a new organization or a new contact type on-the-fly.
NOTE: New organizations or contact types can also be added using Lookup Tables.

Choose an item from the list.

Enter your input in this field.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Enter your input in this field.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Click this button to make your choice.

Choose an item from the list.

Enter your input in this field.

Enter your input in this field.

Enter your input in this field.

Enter your input in this field.

Choose an item from the list.

Enter your input in this field.

Enter your input in this field.

Choose an item from the list.

Choose an item from the list.

Choose an item from the list.

Choose an item from the list.

Choose an item from the list.

Click this button to make your choice.

Choose an item from the list.

Choose an item from the list.

Choose an item from the list.

Enter your input in this field.

Enter your input in this field.

Choose an item from the list.

Enter your input in this field.

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, the 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 nine 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, Time Entry, My Issues, Knowledge Base, Scheduler, Report Manager, and Lookup Tables.

How SDS HelpDesk Helps Your Customers

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

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.   You can see whether a customer's service contract is valid, view a list of   issues for that customer, see their name, phone number, and organization all from the Issue Manager screen, search on any field, see a quick view of key information without having to open the issue, change the search result sort order, view attachments, log time spent on the issue, and add the solution to the Knowledge Base.

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?   Once they are a licensed user, you can 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 title, category, location, keywords or dates.

The Time Entry module records the actual and billable hours spent on an issue.   You can search Time Tracker by user, organization, contract, issue, dates, and billable or non-billable time.

The My Issues module displays issues where you are part of the work group.   Click the View button and it takes you directly to the Issue Manager module.

The Scheduler acts as a personal scheduler and lets you post a reminder whenever you need to follow up with a customer.

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

Contacting Scott Data Systems

Technical Support

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 the Help button in a module to display the relevant help information.

Contacting Scott Data Systems

Scott Data Systems, Inc.

Website: www.ScottDataSystems.com

Technical Support

E-mail: Use E-mail to ask questions and receive answers.   Our E-mail address is
support@ScottDataSystems.com.

License Agreement and Code

Users of SDS HelpDesk must have a valid SDS Software License and license code. There are two types of license codes.   One is a temporary code, which expires after a reasonable evaluation period.   Your temporary demo code is entered for you automatically when you install SDS HelpDesk.   The other is a permanent code.   This code is given to users who register and purchase the software.   Once you register the program, email Scott Data Systems for a permanent license code.

1. Start SDS HelpDesk.   The following dialog box opens.
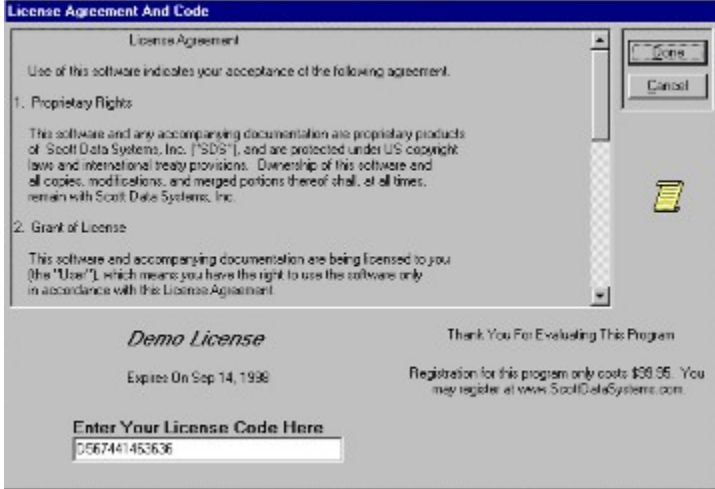
2. Your current License Code is displayed.   Demo licenses also display the expiration date.   **An unregistered version of the program will not function after the evaluation period until it becomes registered**.

3. If you have not already done so, be sure to read the License Agreement.   Click the **Done** button.

4. You need to logon and enter a password when you start SDS HelpDesk. The Start Wizard can be used initially to make it easier to get started.   The top two buttons will pre-configure the login screen for you during the evaluation phase.   The bottom two buttons can be used once you begin to enter information into the HelpDesk database.   **Initially the password for ADMIN is admin**. This password can be changed at a later time when you have entered more users.   After you have been added as a user and have been given an initial password, enter your password whenever you start the program.

You are now ready to begin using SDS HelpDesk.

The following dialog box opens when the evaluation period expires on a demo license code.   Close the dialog box.   Click the **Help** menu and select the **Registration Information** option.   This will provide instructions on how to register the program and obtain a permanent license code.

Updating Your License Code

You need to update your SDS License Code when you register the program, or if you need additional evaluation time on a demo license.   Click the **Help** menu and select the **How to Register** option. This will provide instructions on how to register the program and obtain a permanent license code.
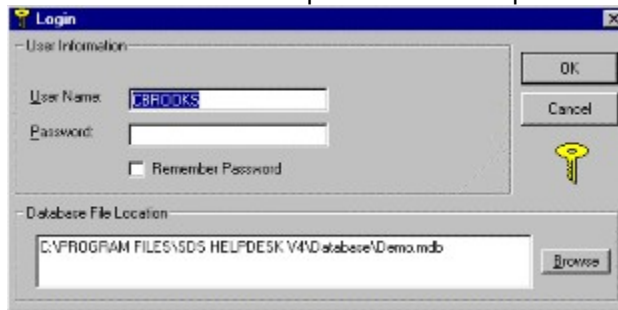
1. Click the **File** menu.   Select the **License** option to open the following dialog box.
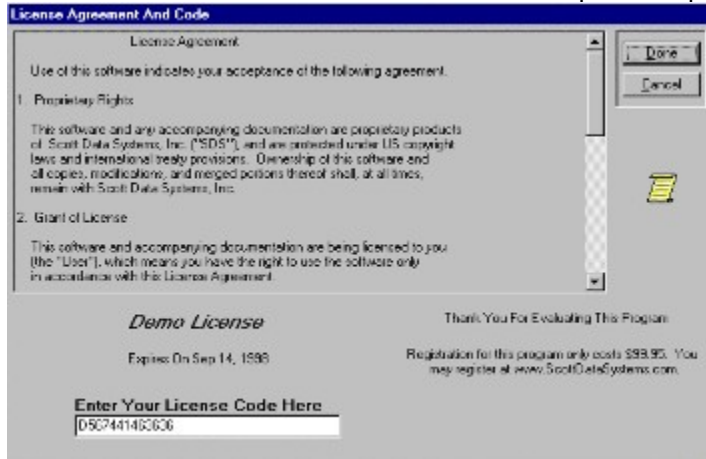
2. Enter the new license code in the edit box.

3. Click the **Done** button.

User Login

Whenever you start SDS HelpDesk you will be asked to enter your password.   The system administrator must set up users and their passwords from the **Admin, Users** menu option.

1. Enter your user name.

    NOTE: Your user name and password are case sensitive.

2. Enter your password in the edit box.   Click the **OK** button.

3. You will be notified if you enter an invalid password.

You can change your password at any time using the **Modules** menu, **Change Password** option.   You can also check the Remember Password box.   This will save you from typing in your password.

NOTE: It is recommended that you leave this box unchecked if multiple people have access to your computer.

Getting to Know SDS HelpDesk

Any time you begin to learn a new program, it is hard to know just where to start.   If you are the system administrator, certain items need to be set up before others begin to use the program.   If you are a support professional, you want to know which modules to implement first so you can be the most affective for your customers.

There are many approaches you can take to initially set up SDS HelpDesk.   Much of the information can be added "on-the-fly."   This means you can start using the program, then add new information when you need it directly from the screen where you are working.   However, many times it is more efficient, and improves the accuracy of data entry, to pre-load the most commonly used information such as contacts, organizations, issue categories and locations.   The question becomes -- What should be done when, and what information should be preloaded?

Once you logon to SDS HelpDesk, three screens will open.   They are the **Start Wizard**, the **Setup Wizard** and the **Work Flow Wizard**.   These screens will help you to get started and to set up your own help desk database.

Many procedures are similar throughout SDS HelpDesk.   Once you learn the basic procedures, you can use them in any of the modules.   This helps to shorten your learning curve and get you up and running quickly.

Start Wizard

The Start Wizard can be used to pre-configure the login screen.   Until you check the "Hide this Screen" box (bottom left-hand corner), the Start Wizard opens whenever you start SDS HelpDesk.   To launch the Start Wizard after the "Hide this Screen" box is checked, click the **Help** menu.   Select the **Show Start Wizard** option.
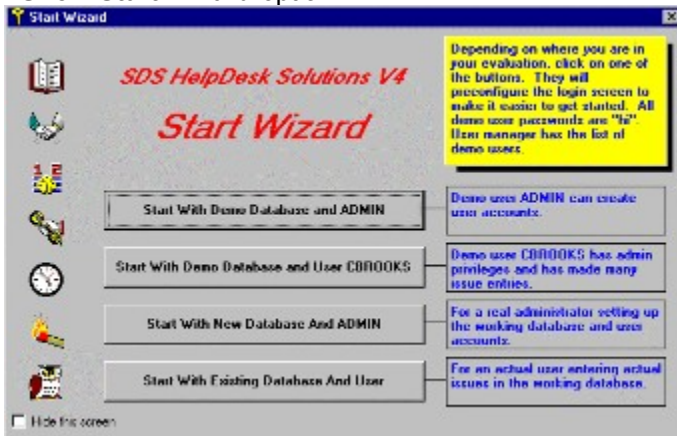

1. Click the **first button** if you want to connect to the Demo database and log in as the administrator. The default password for the administrator is "admin."   It has been entered for you automatically. The default path to the Demo database has also been entered for you.   Just click the **OK** button.

2. Click the **second button** if you want to connect to the Demo database but log in as the user, CBROOKS.   The password for all Demo users is "hi." It has been entered for you automatically. The default path to the Demo database has also been entered for you.   Just click the **OK** button.

3. Click the **third button** if you want to connect to the SDS HelpDesk database (HelpDesk.mdb) and log in as the administrator. The default password for the administrator is "admin."   It has been entered for you automatically.   The default path to the HelpDesk database has also been entered for you.   Just click the **OK** button.

4. Once you have entered your own information into the HelpDesk database, you can click the **fourth button** whenever you want to log onto it.   Your user name will be entered for you automatically. **NOTE**:   If you previously logged onto the program as a different user or as the administrator, that user name will be displayed.   Enter your password and click the **OK** button.

   You can change your password at any time using the **Modules** menu, **Change Password** option. You can also check the Remember Password box.   This will save you from typing in your password.   **NOTE**:   It is recommended that you leave this box unchecked if multiple people have access to your computer.

Setup Wizard

The Setup Wizard can be used to help the system administrator configure SDS HelpDesk.   Until you check the "Hide this Screen" box (bottom left-hand corner), Setup Wizard opens after you logon to SDS HelpDesk.   To launch Setup Wizard after the "Hide this Screen" box is checked, click the **Help** menu.   Select the **Show Setup Wizard** option.
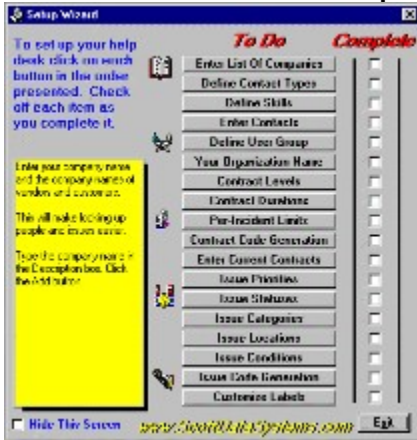
As you move your mouse cursor over each button, a description or tip is displayed in the large box on the left.

1. Click on each button in the order presented.   This launches the appropriate dialog box or module. Detailed instructions for each of these setup items can be found in Administrator Setup Items.

2. As you complete each item in the Setup Wizard, check the box next to it.   This will help you keep track of where you are in the setup process.

3. When you have finished with all of the setup items, check the "**Hide this Section**" box.   When this box is checked Setup Wizard does not open automatically after you logon to SDS HelpDesk.

Work Flow Wizard

The Work Flow Wizard displays how information flows through SDS HelpDesk. Until you check the "Hide this Screen" box (bottom left-hand corner), Work Flow Wizard opens after you logon to SDS HelpDesk.   To launch Work Flow Wizard after the "Hide this Screen" box is checked, click the **Help** menu.   Select the **Show Work Flow Wizard** option.

SDS HelpDesk uses the contact as the starting point for all other information. Click each button to open the module as you talk with your customers.   Detailed instructions for each module can be found in the Help File or you can click the   context-sensitive Help button in each module.   The following describes the recommended process for entering new information.

Work Flow Phase 1: Enter Contact Information into Address Book

It is recommended that you start with Address Book whenever a new customer calls.   While it is not mandatory that you fill in all of the information in Address Book, you do need to enter the contact name and the organization if there is one.   It is also recommended that you enter a phone number so that you can contact the customer again if necessary.   The name and organization are used throughout all of the other modules.   Once you have entered the contact information into Address Book, click the View Contracts button to open the Contracts module, or use the Work Flow Wizard to go into Phase 2: Enter Service Contract Information.   If your organization does not use service contracts, you can skip Phase 2 and go directly into Phase 3: Enter Issue Information.

Work Flow Phase 2: Enter Service Contract Information

Once you have entered the customer information into Address Book, you can click the View Contracts button.   A context sensitive search will automatically be performed.   If a contract exists for the customer, it is displayed in the Contract screen.   If a contract does not exist for the customer, the contract screen will be filled in with the organization and contact name so that you can set up a new contract.   After you have set up a valid service contract, you can move to Phase 3: Enter Issue Information.   If your organization does not use service contracts, you can skip Phase 2 and go directly to Phase 3.   If you prefer, you can go directly from Address Book to the Issue Manager screen by clicking on the View Issues button.

Work Flow Phase 3: Enter Issue Information

If your organization does not use service contracts, you can click the View Issue button in Address Book.   A context sensitive search will automatically be performed.   If issues exist for the customer, the Issue Manager screen will open and a list of issues will be displayed.   Single-click on any of the issues to see a Quick View of the key information.   If no issues exist for the customer, the Issue Manager screen will be filled in with the organization and contact so that you can set up the new issue.   Enter the appropriate issue information for the customer.   While it is not required that you fill in all of the information in Issue Manager, the organization and the issue category are mandatory fields.   It is recommended that you also specify the issue location information.   Doing this greatly enhances your search capabilities.   In some cases you may find that you cannot resolve the issue immediately and need to follow up later with the customer.   When this is the case, proceed to Phase 4: Set up Follow-up Items.

Work Flow Phase 4: Set up Follow-up Items

Phase 4 is only needed when you find that you cannot resolve an issue immediately and you need to investigate the issue, communicate with work group members, and follow up with a customer.

Getting to Know the SDS HelpDesk Window

The main window is displayed when you start SDS HelpDesk.   The major elements found in this window are the Main Menu, the Toolbar, and the Status Bar.

The Main Menu

Each item on the menu bar opens a drop down list of commands.   The menu bar items include File, Admin, Modules, Window, and Help.   The commands let you perform specific operations, open dialog boxes to enter needed information, or select the SDS HelpDesk database.

- **File Menu** – The File Menu includes commands to enter or change your SDS License Code, log onto an SDS HelpDesk database, refresh the database information, or exit the program.

- **Admin Menu** – This menu is available only to users with system administrator permissions.   It includes commands to view user logons, add users, view locked record information, enter your organization name, change the path to the Help and reports files, set service contract and issue code formats, and customize certain labels.

- **Modules Menu** - Each of the modules can be launched from this menu.   It also includes commands to change a password, prompt when adding information on-the-fly, change workstation fonts, hide the initial splash screen, and display raised or depressed module sections.

- **Window Menu** – Use this menu to set how individual windows are displayed on the screen.   With SDS HelpDesk you can open multiple copies of the same module.

- **Help Menu** – The Help menu is used to activate the on-line help file, launch the Start, Setup, or Work Flow Wizards, find out how to register SDS HelpDesk, or find out about this version of SDS HelpDesk.

The Toolbar

The toolbar provides shortcuts to HelpDesk modules and lets you know when an issue has been sent to you for review.

1	2	3	4	5	6	7	8	9
10		11						

1	Address Book
2	Service Contract Manager
3	Reports Manager
4	Lookup Tables
5	Scheduler
6	Issue Manager
7	Time Entry
8	My Issues
9	Knowledge Base
10	Current User Name
11	This box alerts you of issues or messages that have been sent to you for review.

Selecting Items from a Drop-Down Tree

Drop-down trees are used throughout SDS HelpDesk to enter repetitive data (e.g., categories, subcategories, issue locations, or conditions.   The information that is entered in Lookup Tables is displayed in the various drop-down trees.

1.   Open a module (e.g., Issue Manager).   You will see large buttons ⬛ next to the Category, Location, and Condition boxes.

2.   Click the large button to view the drop-down tree.

3.   The tree format enables you to view the hierarchy of items.   A plus (+) next to an item means that there is another level below it.   Click the plus (+) to see the next level.   Double-click the lowest level item and it and all of the levels above it are entered for you automatically.

Selecting Items from a Lookup Table

You can enter repetitive data (e.g., organization, location, condition, status, priority, skills) directly from Lookup Tables.   Lookup Tables are also used to enter new information into drop-down trees and boxes or to modify currently existing repetitive data.

1. Open a module.   You will see small   buttons next to the drop-down boxes.

2. Click the small button to launch the associated Lookup Table.   Double-click on the item you want and it is entered for you automatically.

Mandatory Fields

Some fields are mandatory and need to be entered.   A green box surrounds the mandatory fields in each module.   The **Add** button does not become active until the mandatory fields are filled in.

Implementation Overview

Any time you begin to learn a new program, it is hard to know just where to start.   If you are the system administrator, certain items need to be set up before others can begin to use the program.   If you are a support professional, you want to know which modules to implement first so you can be the most affective for your customers.

There are many approaches you can take to initially set up SDS HelpDesk.   One approach is to use the Setup Wizard.   The wizard is visible when you first start SDS HelpDesk.   If it is not visible, click the Help menu, Show Setup Wizard option.   How to Use Setup Wizard

Much of the information can be added "on-the-fly."   This means you can start using the program, then add new information when you need it directly from the screen where you are working.   However, many times it is more efficient, and improves the accuracy of data entry, to preload the most commonly used information such as contacts, organizations, locations, and categories.   The question then becomes -- What should be done when, and what information should be preloaded?

Stage 1 is the most critical and needs to be completed by the system administrator.   **Stage 2** shows two modules where it may be more efficient for users if initial information is preloaded.   If you already have customers with service contracts, you may want to consider pre-loading this information in **Stage 3**.   **Stages 4 and 5** can be implemented in any order, and information can be added on-the-fly.

Checklists are furnished for each stage with a list of items that need to be set up or considered.

Stage 1:   System Setup

Stage 2:   Preload Most Commonly Used Information

Stage 3:   Add Service Contracts

Stage 4:   Add Issue Manager

Stage 5:   Add Scheduler

Implementation Checklists

The quickest way to set up SDS HelpDesk is to use the Setup Wizard.   <u>How to Use Setup Wizard</u>   As an alternative, you can use the following checklists as a quick guide for initially setting up the SDS HelpDesk.   Some items, like those listed in the system setup for the administrator, need to be completed before others can begin to use the program.

Stage 1: System Setup

System Administrator Items:

ₙ Set or reset file locations.

ₙ Enter organization name into system.

ₙ Set up the User list, permissions, and initial passwords.

ₙ Set format for service code numbers.

ₙ Set format for issue code numbers.

ₙ Customize Issue Manager location, category, and condition labels, and Address Book user definable labels.

User Items (Optional):

ₙ Customize workstation font colors.

ₙ Change user password.

ₙ Enable or disable prompt message for adding data on-the-fly.

Stage 2: Preload Most Commonly Used Information

This is not mandatory.   However, preloading some of this information increases user efficiency.

Lookup Tables - Set up by System Administrator

ₙ Build an initial list of Issue categories/subcategories.

ₙ Define and build up to four levels of Issue locations.

ₙ Define an initial list of Issue priority categories.

ₙ Define an initial list of Issue status levels.

ₙ Build an initial list of contact organization names here or in Address Book.

ₙ Define an initial list of contact types (e.g., customer, employee, vendor, tenant) here or in Address Book.

ₙ Define an initial list of Service Contract levels here or in Service Contracts.

ₙ Define an initial set of contract durations (e.g., annual, quarterly, 30 days) here or in Service Contracts.

Address Book Manager

ₙ Build an initial list of contact organization names here or in Lookup Tables.

ₙ Define an initial list of contact types (e.g., customer, employee, vendor, tenant) here or in Lookup Tables.

ₙ Define an initial list of contact skills (e.g., management, sales, tech support, plumbing, electrical, programming) here or in Lookup Tables.

ₙ Add as much or as little contact information as you need to get started.

Stage 3: Add Service Contracts

- Define an initial list of Service Contract levels (e.g., warranty, single site, per incident, etc.) here or in Lookup Tables.

- Define an initial list of contract time durations (e.g., annual, 120 days, etc.) here or in Lookup Tables.

- If appropriate, define Per Incident blocks.

- The Contract Code Number format needs to be set up by the system administrator.

- Add as much or as little Service Contract information as you need to get started.

Stage 4: Add Issue Manager

- Build an initial list of Issue categories and subcategories here or in Lookup Tables.

- Build an initial list of issue locations here or in Lookup Tables.

- Define an initial list of Issue status levels here or in Lookup Tables.

- Define an initial list of Issue priority levels here or in Lookup Tables.

- Define an initial list of condition categories.

- Define an initial list of condition values.

Stage 5: Add Scheduler

- Add information on-the-fly.

Administrator Setup Overview

This section was written to help the system administrator configure SDS HelpDesk.   It includes step-by-step instructions for those items that need to be set up before others can begin using the program. These are the items that are included in Stage 1 of the Implementation Checklist.

Three setup items are also covered in this section for individual users. They include changing your password, customizing workstation font colors, and enabling or disabling a prompt message for adding data on-the-fly. You can set these items up at any time.

Selecting the Database

SDS HelpDesk needs to know where the database is located.   The database is where all of the information you enter into the program is stored.   This connection is taken care of for you automatically if SDS HelpDesk is installed on a single computer.   In a multi-user environment, the database file (HelpDesk.mdb) usually is moved to the network server.   When this happens, you need to change the path to the new location.

1. Click the **File** menu.   Select the **Login** option.   The current database path is displayed in the Database File Location box.

2. Click the **Browse** button if you want to select a different database or you want to connect to the SDS HelpDesk database once it is moved to a network server.   An Open dialog box appears. Use the Look in drop down list to locate the database file.

3. Select the database file then click the **Open** button.   The path to the database is displayed in the Database File Location box.

Enter the Organization Name into the System

You will want to enter the name of your organization into the system as part of the setup process.   This is the name that can be used as part of your issue code or contract code formats.   It is also used when you set up users.

1. Click the **Admin** menu on the header bar.   Select the **Organization Name** option.   The following Organization Name dialog box will open.


2. Type the name of your organization in the box.

3. Click the **Change** button to save the organization name, and then click **Exit**.

Set or Reset Report Files Location

When you install SDS HelpDesk, the report files location is set for you automatically. If you move the location of these files, use the following steps to reset the location.

1. Click the **Admin** menu.   Select the **Reports Location** option to open the dialog box.
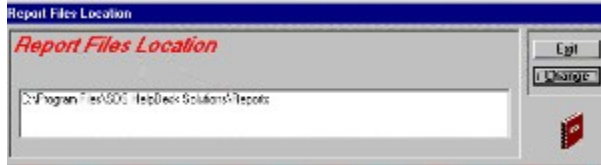
2. Click the **Change** button.   This launches the Open dialog box.   Use the Look in drop down list to locate the Reports folder.   Double-click on the folder, select any of the report file names (e.g., category.rpt), and then click the **Open** button.   This takes you back to the Report Files Location dialog box.   The complete path is displayed.

3. Click the **Exit** button.

Set or Reset Help File Location

When you install SDS HelpDesk, the Help files location is set for you automatically. If you move the location of these files, use the following steps to reset the location.

1. Click the **Admin** menu.   Select the **Help File Location** option to open the dialog box.

2. Click the **Change** button.   This launches the Open dialog box.   Use the Look in drop down list to locate the Help folder.   Double-click on the folder, select the file (HelpDesk.hlp), and then click the **Open** button.   This takes you back to the Help File Location dialog box.   The complete path is displayed.

3. Click the **Exit** button.

User List, Permissions, and Initial Passwords

Anyone who needs to be able to access SDS HelpDesk, must be entered into the system as a contact and as a user by the system administrator.   Use the User Manager dialog box to add authorized users, to allow certain users to modify key information, and to set initial user passwords.   The system administrator can add new users at any time.   The number of users who can access SDS HelpDesk concurrently is dependent upon the number of licenses you purchase.

Click the **Admin** menu.   Select the **Users** option to launch the User Manager dialog box.

 Steps to . . .

Add a New User

Add User Information

Modify User Information

Delete a User

Add Initial User Passwords

Set User Permissions

Find a User

Print SnapShot Report

Add a New User

1. Before users can logon to SDS HelpDesk, they must be added to the Address Book via the administrator's Users screen.   Click the **Admin** menu on the header bar.   Select the **Users** option.   Click the **Full Name** title to launch Address Book.   The only information you need to enter now to set up these contacts as users is their name, organization, and contact type.

2. Enter the user's full name in the Address Book Contact box.

3. Select your organization name from the Organization drop down list.

4. Select Employee from the Contact Type drop down list.

5. Click the **Add** button to save the contact to the database. If you discover an error after clicking the **Add** button, select the information you need to correct, make your modifications, and then click the **Update** button.

6. To add another user, select the current contact's full name.   Type in the name of the next user contact.   Click the **Add** button.   Repeat this process until all of your potential users are added.

   NOTE: If you start with just these mandatory pieces of information, you quickly can add all of your potential users as contacts.

7. When you have finished adding the contacts that you want to designate as Users, close or minimize the Address Book module.   The User Manager screen should be visible.   The contacts you just added are listed in the large Contacts box.

8. Select the name of the person you want to designate as a user.   The name is displayed in the Full Name box.   Type a user name for this person in the User Name box.   A User name must be unique.   It can be any combination of alphanumeric characters, and is the name that is used when the user logs on.   The maximum length for a user name is ten characters.

9. Enter an initial password for the user.   It is important to note that passwords are case sensitive. Be sure to let the user know what his/her initial password is.   Keep a list of user passwords in a secure place.

10. If applicable to this user, check the appropriate boxes in the Permissions section.   If checked, the user will be able to carry out the function listed.

11. Click the **Add** button to save the information.   You will see the user's User Name and full name in the large box on the right.   Repeat this process for each contact you want to designate as a user of SDS HelpDesk.

Add User Information

1. The contacts you added are listed in the large box on the left.   Select the person you want to add as a user.   The name is displayed in the Full Name box.

2. Type the person's user name in the User Name box.   A User name must be unique.   It can be any combination of alphanumeric characters, and is the name that is used when the user logs on. The maximum length for a user name is ten characters.

3. Enter an initial password for the user.   It is important to note that passwords are case sensitive. Be sure to let the user know what his/her initial password is.   Keep a list of user passwords in a secure place.

4. If applicable to this user, check the appropriate boxes in the Permissions section.   If checked, the user will be able to carry out the function listed.

5. Click the **Add** button to save the information.

Modify User Information

1. Select the person from the User List whose information you want to change.
2. Make your modifications.   Click the **Update** button to save your changes.

Delete a User

1. Select the person you want to delete from the User List.
2. Click the **Delete** button.   The user will be unable to logon to SDS HelpDesk.

Add Initial User Passwords

1. Select the person from the User List.

2. Enter an initial password in the Password box.

3. When finished, click the **Update** button to save your changes.

Set User Permissions

1. Select the person from the User List.

2. If applicable to this user, check the appropriate boxes in the Permissions section.   If checked, the user is able to carry out the function listed.

3. When finished, click the **Update** button to save your changes.

Find a User

You can use the search engine to find all users who are a specific contact type, such as employee. You can also search for users who have a specific skill, such as technical support, plumber, programmer, or engineer.

1. Select the Contact Type or Skill from the appropriate drop down list.   You can use the drop down lists either separately or together.   If used together, the search engine locates users who are a specific contact type **and** have a specific skill.

2. Click the **Find** button.   The filtered list displays in the large box on the left.

Print or Preview User SnapShot Report

SnapShot reports are used when you want a printout of information for a currently selected record.   In the User Manager screen, the SnapShot report gives you a list of users, user names, and permissions.

1. Select a person from the User List.

2. Click the **Preview** button to see the report before it is printed.

3. Click the **Print** button for a hard copy of the report.

View Concurrently Logged on Users

The number of licenses you purchase determines the number of users who can be logged on concurrently to SDS HelpDesk.   This means you can set up any number of users, but only a certain number can use the program at the same time.   The system administrator may need to know which users are logged on to the program.   This is important if you have more users than concurrent licenses and need to trade off users.

1. Click the **Admin** menu.   Select the **Logons** option to launch the User Logons dialog box.   The dialog box shows which users are logged on, the computer they logged on from, their phone number, and the date and time they logged on.

2. To logoff a user, select their User Name from the list.

3. Click the **LogOff** button.   There is a one-minute timeout before the logoff takes effect.

    NOTE: Be sure to notify users before logging them off the system so that they have time to finish what they are doing.

Use the **Refresh** button to update the list of concurrently logged on users.

Format Contract Numbers

SDS HelpDesk lets you customize your service contract codes/numbers.   Contract numbers can include fixed text, the date, or portions of your company name.   If you already have service contracts, you can continue to use the same format.

Click the **Admin** menu on the header bar.   Select the **Contract Code Assignment** option to launch the Customize Contracts dialog box.

- ### Steps to . . .

Set Contract Code Options

Format Fixed Text

Format Date/Time

Format Counter Settings

Format Other Fields

Set Code Order

Test Sample Contract Number

Use Contract Get Button

Set Contract Code Options

You have a lot of flexibility in how you want to set up your service contract numbers.   They can be a simple incrementing number, or something more complex that includes fixed text, a date, and an incrementing number.   If you already have a format for service contract numbers, you can continue using it.   The important thing is that each contract code must be unique.

1. There are two radio buttons to choose from.   If you already have service contracts, you can choose one option during the initial data entry phase, and then switch to the Custom option for new contracts.

    - Select "Use contract field text" to let users type a contract number directly into the Contract field. This is useful during the initial data entry phase for currently existing contracts, or if you have a special format that you want to continue using.   If you select this radio button, you do not need to do anything else.   Click the **Save** button.

    - Select "Custom" to set up a new format.   Proceed to step 2.

2. You may want to include fixed text in your contract number to make it distinct from an issue number.   For example, you can start each contract number with "CON."   Type the fixed text in the Text1 box.   Use Text2 to add additional fixed text.   Hyphens can be included before or after the text.

3. The current date/time can be included as part of the code.   This may be helpful if an organization has multiple contracts.   Type the format in the Date box (e.g., mm/dd/yy) and the format in the Time box (e.g., hh:mm:ss).

4. Each contract code must be unique.   Use the Counter Settings to format the incrementing number. Enter the starting number in the Start Count box.

5. Enter the highest number you think you will need in the End Count box. The maximum is 9999999.

6. Use the Count box to set how the number should increment.   Enter a 1 to increment the number one unit at a time, a 2 to increment the number two units at a time, etc.

7. Using the number 0 in the Format box, indicate the number of digits you want. For example, if you want the incrementing number to be four digits, enter 0000 in the Format box.   If not all of the digits are used, the number shows leading zeros.

8. You can include all or a portion of your company name in the contract number.   Enter the number of letters, including spaces, you want to include in the Company box.   For example, to include "Scott Data" in all contract numbers, enter the number 10 in the Company box.   The number of letters you can include is limited by the other options you choose.   The maximum size of a contract code is 30 characters, including spaces, hyphens, etc.

9. Use the small boxes to set the order the options appear in the contract number.   For example, a 1 puts the option first, a 2 second, etc.

10. Click the **Test** button to see how your contract numbers will look.   The number is displayed in the Test Results box.   To try another format, click the **Clear** button to get a blank screen.

11. When you are satisfied with the format, click the **Save** button.

Format Contract Number Fixed Text

You may want to include fixed text in your contract number to make it distinct from an issue number. For example, you can start each contract number with "CON."

1. Type the fixed text in the Text1 box.   Use Text2 to add additional fixed text.   Hyphens can be included before or after the text.

2. Use the small box to set where the fixed text option appears in the number.   For example, if you want to start each contract number with CON, enter a 1 in the small box next to the text.

3. Each contract number must be unique.   Use the Counter Settings to format the incrementing number (see Format Counter Settings for details).

4. Click the **Test** button to see a sample of your format.   If OK, click **Save**.

Format Contract Number Date/Time

The current date/time can be included as part of the contract number.   This may be helpful if an organization has multiple contracts.

1. Type the format in the Date box (e.g., mm/dd/yy) and the format in the Time box (e.g., hh:mm:ss).

2. Use the small box to set where the date option appears in the number.   For example, if you want to start each contract number with fixed text and then the date, enter a 2 in the small box next to the Date.

3. Each contract number must be unique.   Use the Counter Settings to format the incrementing number (see Format Counter Settings for details).

4. Click the **Test** button to see a sample of your format.   If OK, click **Save**.

Format Contract Number Counter Settings

Each contract number must be unique.   Use the Counter Settings to format the incrementing number.

1. Enter the starting number in the Start Count box.

2. Enter the highest number you think you will need in the End Count box. The maximum is 9999999.

3. Use the Count box to set how the number should increment.   Enter a 1 to increment the number one unit at a time, a 2 to increment the number two units at a time, etc.

4. Using the number "0" in the Format box, set the number of digits you want. For example, if you want the incrementing number to be four digits, enter 0000 in the Format box.   If not all of the digits are used, the number shows leading zeros.

5. Use the small box to set where the counter option appears in the number.   For example, if each contract number starts with fixed text, and then the date, and then the incrementing number, enter a 3 in the small box next to Format.

6. Click the **Test** button to see a sample of your format.   If OK, click **Save**.

Format Other Fields in Contract Number

You can include all or a portion of your company name in the contract code.

1. In the Company box, enter the number of letters, including spaces, you want to include. For example, to include "Scott Data" in all contract numbers, enter the number 10 in the Company box. The number of letters you can include is limited by the other options you choose. The maximum size of a contract code is 30 characters, including spaces, hyphens, etc.

2. Use the small box to set where the Company option appears in the number. For example, if each contract number starts with fixed text, and then the company, and then the incrementing number, enter a 2 in the small box.

3. Each contract code must be unique. Use the Counter Settings to format the incrementing number (see Format Counter Settings for details).

4. Click the **Test** button to see a sample of your format. If OK, click **Save**.

Set Contract Number Code Order

The small boxes next to the options are used to set the order the options appear in the contract number.   For example, if you want fixed text to appear first, enter a 1 in the small box next to the text. If you want the incrementing number to appear next, enter a 2 in the small box next to Format.   Enter an order number for each of the options you want to include in the contract number.

Test Sample Contract Number

You may want to see how the contract number will look before you save the format.
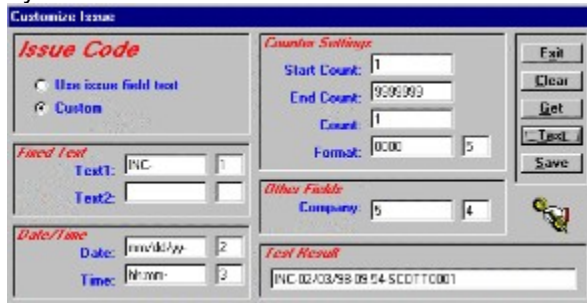
1. Click the **Test** button to see a sample.   The number is displayed in the Test Result box.

2. When you are satisfied with the format, click the **Save** button.

Contract Get Button

Click the Get button to see the current contract number format if there is one. This is helpful if you want to use the format as a template.

Format Issue Numbers

You can customize your issue codes/numbers to fit the needs of your company.   Issue codes can include fixed text, the date, or a portion of your company name.   If you already have issue numbers, you can continue to use the same format.

Click the **Admin** menu.   Select the **Issue Code Assignment** option to launch the Customize Issue dialog box.

▪   **Steps to . . .**

Set Issue Code Options

Format Fixed Text

Format Date/Time

Format Counter Settings

Format Other Fields

Set Code Order

Test Sample Issue Number

Use Issue Get Button

Set Issue Code Options

Issue numbers can be simple incrementing numbers or something more complex depending on your needs.   The numbers can include fixed text, a date, and an incrementing number.   If you already have a format for issue numbers, you can continue using it.

1. There are two radio buttons to choose from.   If you already have issue numbers, you can choose one option during the initial data entry phase, and then switch to the Custom option for new issues.

    • Select "Use issue field text" to let users type an issue number directly into the Title field.   This is useful during the initial data entry phase for currently existing issues, or if you have a special format that you want to continue using.   If you select this radio button, you do not need to do anything else.   Click the **Save** button.

    • Select "Custom" to set up a new format.   Proceed to step 2.

2. You may want to include fixed text in your issue number to make it distinct from a service contract number.   For example, you can start each issue number with "ISSUE."   Type the fixed text in the Text1 box.   Use Text2 to add additional fixed text.   Hyphens can be included before or after the text.

3. The current date/time can be included as part of the issue number.   This may be helpful if a customer calls you frequently.   Type the format in the Date box (e.g., mm/dd/yy) and the format in the Time box (e.g., hh:mm:ss).

4. Each issue number must be unique.   Use the Counter Settings to format the incrementing number.   Enter the starting number in the Start Count box.

5. Enter the highest number you think you will need in the End Count box. The maximum is 999999999.

6. Use the Count box to set how the number should increment.   Enter a 1 to increment the number one unit at a time, a 2 to increment the number two units at a time, etc.

7. Using the number 0 in the Format box, indicate the number of digits you want. For example, if you want the incrementing number to be four digits, enter 0000 in the Format box.   If not all of the digits are used, the number shows leading zeros.

8. You can include all or a portion of your company name in the issue number.   Enter the number of letters you want to include, including spaces, in the Company box.   For example, to include "Scott Data" in all issue numbers, enter the number 10.   The number of letters you can include is limited by the other options you choose.   The maximum size of an issue code is 30 characters, including spaces, hyphens, etc.

9. Use the small boxes to set the order the options appear in the issue number.   For example, a 1 puts the option first, a 2 second, etc.

10. Click the **Test** button to see how your issue numbers will look.   The number is displayed in the Sample Issue # box.   To try another format, click the **Clear** button to get a blank screen.

11. When you are satisfied with the format, click the **Save** button.

Format Issue Number Fixed Text

You may want to include fixed text in your issue number to make it distinct from a service contract number.   For example, you can start each issue number with "ISSUE."

1. Type the fixed text in the Text1 box.   Use Text2 to add additional fixed text.   Hyphens can be included before or after the text.

2. Use the small box to set where the fixed text option appears in the number.   For example, if you want to start each issue number with ISSUE, enter a 1 in the small box next to the text.

3. Each issue number must be unique.   Use the Counter Settings to format the incrementing number (see Format Counter Settings for details).

4. Click the **Test** button to see a sample of your format.   If OK, click **Save**.

Format Issue Number Date/Time

The current date/time can be included as part of the issue number.   This may be helpful if a customer calls frequently.

1. Type the format you want to use in the Date box (e.g., mm/dd/yy) and the format you want to use in the Time box (e.g., hh:mm:ss).

2. Use the small box to set where the option appears in the number.   For example, if you want to start each issue number with fixed text and then the date, enter a 2 in the small box next to the Date.

3. Each issue number must be unique.   Use the Counter Settings to format the incrementing number (see Format Counter Settings for details).

4. Click the **Test** button to see a sample of your format.   If OK, click **Save**.

Format Issue Number Counter Settings

Each issue number must be unique.   Use the Counter Settings to format the incrementing number.

1. Enter the starting number in the Start Count box.

2. Enter the highest number you think you will need in the End Count box. The maximum is 99999999.

3. Use the Count box to set how the number should increment.   Enter a 1 to increment the number one unit at a time, a 2 to increment the number two units at a time, etc.

4. Using the number 0 in the Format box, indicate the number of digits you want. For example, if you want the incrementing number to be four digits, enter 0000 in the Format box.   If not all of the digits are used, the number shows leading zeros.

5. Use the small box to set where the counter option appears in the number.   For example, if each issue number starts with fixed text, and then the date, and then the incrementing number, enter a 3 in the small box next to Format.

6. Click the **Test** button to see a sample of your format.   If OK, click **Save**.

Format Other Fields in Issue Number

You can include all or a portion of your company name in the issue number.

1. In the Company box, enter the number of letters, including spaces, you want to include.   For example, to include "Scott Data" in all issue numbers, enter the number 10 in the Company box.

2. Use the small box to set where the Company option appears in the number.   For example, if each issue number starts with fixed text, and then the company, and then the incrementing number, enter a 2 in the small box.

3. Each issue number must be unique.   Use the Counter Settings to format the incrementing number (see Format Counter Settings for details).

4. Click the **Test** button to see a sample of your format.   If OK, click **Save**.

Set Issue Number Code Order

The small boxes next to the options are used to set the order the options appear in the issue number. For example, if you want fixed text to appear first, enter a 1 in the small box next to the text.   If you want the incrementing number to appear next, enter a 2 in the small box next to Format.   Enter an order number for each of the options you want to include in the issue number.

Test Sample Issue Number

You may want to see how the issue numbers will look before you save the format.

1.   Click the **Test** button to see a sample.   The number is displayed in the Sample Issue # box.

2.   When you are satisfied with the format, click the **Save** button.

Issue Get Button

Click the Get button to see the current issue number format if there is one. This is helpful if you want to use the format as a template.

Define and Customize Labels

You can customize certain of the labels that are used in the Issue Manager and Address Book modules.   Once these labels are redefined and entered into the system, they appear on each user's screen.

1.   Click the **Admin** menu.   Select the **Labels** option to launch the HelpDesk Customization dialog box.
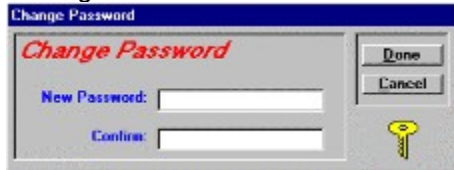
2.   Change the default labels to make them more applicable to your particular organization.   Any label you don't customize will retain the default label.

3.   Click the **Change** button to save the new labels.   You can repeat these steps if you need to modify or change a label later.

Change User Password

The system administrator should give you an initial password to get into SDS HelpDesk.   You can change your password at any time.

Click the **Modules** menu.   Select the **Change Password** option to launch the Change Password dialog box.

1. Enter your new password.

2. Then retype it in the Confirm box to be sure you entered it correctly.

3. Click the **Done** button to save your new password.

   NOTE: Passwords are case sensitive.   Be sure to type your New Password in carefully,   and again when you confirm it.   Make sure you record your password in a secure place in case you forget it.

Customize Workstation Fonts

Each user can customize the fonts used in SDS HelpDesk for labels, groups, entry boxes, and buttons. These customizations occur only for your screens. They do not impact other users.

1. Click the **Modules** menu. Select the **Fonts** option to launch the Application Fonts dialog box.

2. Click the drop down arrow to select an item from the element list.

3. Click the **Change** button. The Font dialog box opens. You can change the font, style, size, and/or color. Click the **OK** button.

4. Repeat the process for each element you want to change. When finished, click the **Done** button.

Prompt Before Adding New Records to the Database

With SDS HelpDesk, you can set whether you want to be prompted whenever you try to add a new item to the database on-the-fly. **The default is set not to prompt you for a confirmation before adding items on-the-fly**.

1. Click the **Modules** menu. Select the **Prompts** option to launch the Prompts dialog box.

2. Check the box if you want to be prompted to confirm on-the-fly additions to the database.

3. Click the **Update** button to save the change.

   NOTE: If the box is checked and you try to enter a new item on-the-fly, a prompt box asks you to confirm the addition.

Lookup Table Overview

The Lookup Tables module is a convenient place to create lists of information such as issue categories, skills, tasks, priorities, organization names, etc.   What you enter in Lookup Tables appears in the drop-down trees and lists throughout SDS HelpDesk.

Pre-loading information into Lookup Tables helps to improve the accuracy of data entry since you can see the items that have already been added.   This reduces the number of slightly different entries that sometimes get made.   If variations of the same information do get entered (e.g., Scott Data Systems and Scott Data Systems, Inc.) SDS HelpDesk lets you merge the data into one record.   If you don't have time to enter data in advance, don't worry.   You can enter the information when you first need it in the other modules.   This is called adding information "on-the-fly."

One of the key features of the Lookup Table Module is its flexibility.   Just choose an appropriate table, and then create a list of items you want to track.

Click the **Lookup Tables** icon   in the toolbar to open the module.

> *NOTE: You can also access a specific Lookup Table from the module where you are working.   Just click the small button near the data entry box.   (Hold you mouse cursor over the button to see a tool tip that prompts you to "Click for Lookup Table."*

When you click the following Lookup Table buttons, a list box data entry screen opens.
- Task
- Skill
- Status
- Priority
- Contact Type
- Contract Limit
- Contract Level
- Contract Duration

Some Lookup Tables can have multiple levels.   These levels are set up in a hierarchy with the broadest item at the top.   At each lower level, the item should be more precise.   The following Lookup Tables display items in a tree-like format.   This format enables you to view the hierarchy of the items.
- Category
- Location
- Condition
- Organization

The following is an example of a tree view Lookup Table.   The left-hand box displays the various levels of items.   You can set up to four levels in the Location table and up to two levels in the Category and Condition tables.

The Category table is used to classify the general types of issues your customers may call about (e.g., product defects, how-to questions, broken equipment).   Set up subcategories when you want to break the category into more specific groups.   For example, if you have an issue category called Broken Equipment, you can add Air Conditioner, Copy Machine, and Ceiling Fan as subcategories.

The Location table is used to specify where an issue has occurred.   Each level you add should be more specific.   For example, if you develop a product, the highest level might be Product Name.   The next level could be Model Number.   The third level might be Product Area (e.g., motor, screen, handle), and the fourth level could be Part Number.

The following is a close-up view of how the sample Location Table items are displayed.   In this example, the highest issue location level is SDS HelpDesk Version 1.0.   The minus (-) next to it means the level has been expanded to show the levels under it.

The next level down has several items including File, Admin, Address Book, and Window.   The line that runs from File to Window indicates that these items are at the same level in the hierarchy.   The plus (+) next to Admin and Address Book means that they too have other levels below them, but have not yet been expanded.   Click the (+) to display other levels.

File has been expanded to show a third level.   This level also includes several items including License, Connect, Refresh, and Exit.   License is the only item with another level.

License has been expanded to show the final fourth level item, License Code.

- **Steps to . . .**

[Add a List Box Lookup Table Entry](#)

[Add a Tree View Lookup Table Entry](#)

[Modify a Lookup Table Entry](#)

[Delete a Lookup Table Entry](#)

[Print Lookup Table SnapShot Report](#)

[Merge Duplicates](#)

Add a List Box Lookup Table Entry

1. Select the table you want from the Lookup Table main screen.

2. Any previous entries to this table are displayed in the large list box.   Check to see if the item you want to add already exists.   If not, type the new item in the Description box.

3. Click the **Add** button, or press **ALT + A** to add information quickly.   The item is added to the list and highlighted.

4. Click the **Tab** key.   This returns you to the Description box and highlights the previous entry.

5. While the previous entry is highlighted, type in the next item.   Press **ALT + A**.   Repeat this process until you are finished adding new items to the Lookup Table.

Add a Tree View Lookup Table Entry

1. Select the table you want from the Lookup Table main screen.

2. Any previous entries to this table are displayed in a tree-like format in the large box.   Check to see if the item you want to add already exists.   Since it may be in a lower level, click the (+) if there is one, to expand to the next level.

3. Click on an item to add a new level item below it (e.g., click on a category to add a subcategory to it, or click on a first level location to add a second level location to it).

4. Click the **Tab** key.   This takes you to the Description box and highlights the item.   While still highlighted, enter the new item in the Description box.

5. Click the Add button, or press **ALT + A**.   The item is added to the tree.

6. To add another item to this same level, click the Tab key.   Enter the new item in the Description box.   Press **ALT + A**.   Repeat this process until you are finished adding new items to the Lookup Table.

Modify a Lookup Table Entry

1. Select the appropriate table from the Lookup Table main screen.

2. Select the entry you want to modify.   If it is a tree view type of Lookup Table, you may need to click the (+) to expand the level.   Once selected, the entry is displayed in the Description box.

3. Click on the Description box entry and then make your changes.

4. Click the **Update** button to save your changes.

Delete a Lookup Table Entry

1. Select the appropriate table from the Lookup Table main screen

2. Select the entry you want to delete.   If this is a tree view type of Lookup Table, you may need to click the (+) to expand the level.   Once selected, the entry is displayed in the Description box.

3. Click the **Delete** button.

   NOTE: You can't delete a Lookup Table entry if it is connected to something else.   For example, you can't delete the category Broken Equipment if it has an issue.   SDS HelpDesk hides the entry and it is no longer available to users.   The entry does appear in the SnapShot Report, but the Hide column is marked Yes.

Print Lookup Table SnapShot Report

You may want to preview or print out the contents of your Lookup Tables.   You can do this directly from the Lookup Table module.   The Hide column in some SnapShot Reports indicates which items are no longer available to users.   These are items that are connected to something else (e.g., an issue) and can't be deleted.

1. Select the table from the Lookup Table main screen.

2. Click the **Preview** button to see the report before it is printed.

3. Click the **Print** button to get a SnapShot Report.

Merge Duplicates

If you have multiple support professionals using SDS HelpDesk, you may find slightly different entries being made for the same item.   For example, one user may enter a company as Scott Data Systems. Another user may enter the same company as Scott Data Systems, Inc.   Because they are not exactly the same, the program looks at them as two different companies.

Lookup Tables helps to reduce these duplicates since you can see what has been entered previously. But, if slight variations of the same information do get entered, you can merge the data into one record. This is especially important if contacts and issues have been entered under both company names.

> *NOTE: When you do a merge duplicates, all information associated with the similar names will be merged into a single record.*

The merge duplicates function is located at the bottom of the Lookup Tables screen.   A sample is recreated here for your reference.

1. Select the table from the Lookup Table main screen that contains the similar entries.

2. Select the first entry you want to merge from the large Lookup Table box.   If this is a tree view type of Lookup Table, you may need to click the (+) to expand the level.

3. Click the Items to be Merged plus ▪ button.   The first entry is listed in the box.   Repeat steps 2 and 3 for the next entry or entries you want to merge.   Click the
▭ button to remove an item from the box.

4. Select from the Lookup Table list or tree view box, the one item you want everything else merged into.

5. Click the Merge Into ▪   button.   The name of the item is displayed in the box.   If this is not the item you want, click the
▭ button and repeat steps 4 and 5.

6. Click the Lookup Table **Merge** button.   The other similar names are deleted from the Lookup Table list or tree view box.   All the information associated with these other names has been merged into the one remaining record.

Address Book Overview

SDS HelpDesk provides quick access to various human resource and customer information.   Use Address Book to enter information about any of your contacts.   These can include customers, internal employees, tenants, vendors, contractors, etc.

Specify what skills, expertise, or knowledge your contacts may have.   Then use the built-in search engine to locate individuals or organizations with the right skills and know-how to help resolve an issue. You can view the contracts and issues for a particular contact or organization directly from Address Book.

Click the **Address Book** icon in the toolbar to open the module.

> ***NOTE: The green boxes around the organization and contact fields indicate that these are mandatory fields and must be filled in for each contact.   You can add a generic organization such as "individual" or "none" if the contact is not associated with an organization.***

Steps to . . .

Add a New Contact

Modify Contact Information

Delete a Contact

Use Existing Contact Information as a Template

Assign Skills to a Contact

Use the Search Engine to Find a Contact

View Contracts From Address Book

View Issues from Address Book

Print Contact SnapShot Report

Add a New Contact

The Address Book lets you enter all of your contact information in one place.   You can also view any contact's information on one screen.

1. Select the appropriate organization from the drop-down box.   **Note**:   If you type one or more letters of the organization name in the edit box and then press the down arrow on your keyboard, the closest match is displayed.   If it is a new organization, click the small button next to the edit box to open and add the organization through Lookup Tables.   You can also add the organization on-the-fly by typing the name into the edit box.   When the contact is saved, the organization is also added.

    NOTE: Some contacts may not be associated with an organization.   Since this is a mandatory entry for each contact, just add a general item called "Individual" or "None" and use it for these situations.

2. Type the person's name in the Contact box.

    NOTE: You must use the format of first name, middle initial, last name.   The middle initial is optional.   EXAMPLE: John Jones or John E. Jones

2. Some contacts, such as internal employees, may have ID numbers.   Enter this unique number in the Identifier box.

3. Contacts can be classified into various groups depending on your relationship with them.   These groups may be customers, tenants, contractors, internal employees, individuals, etc.   SDS HelpDesk refers to these groups as Contact Types.   You either can add contact types in Lookup Tables, or on-the-fly in Address Book.

    Click the down arrow to select a contact type from the drop-down list.   If the contact type is not in the list, type the new item in the Contact Type box.   The new contact type is added to the database when you add the new contact.   You can also click the small button next to the drop-down box to add the new contact type through Lookup Tables.

4. Add other information in the boxes provided.   You can also add comments or notes about a contact in the Notes box.   This can be any information that will be helpful to you such as special days or hours the contact is available, spouse name, birthday, quality of work, etc.   You can add up to 256 characters in the Notes box.

5. If the contact is a contractor, enter his/her hourly rate in the Rate box.

6. You can also specify what skills, expertise, or knowledge the contact might have.   Skills can include mechanical, plumbing, programming, bookkeeping, painting, etc.   This information is useful when you need to find individuals with the right skills and know-how to help resolve an issue.

    NOTE: The attach skills function is located in the bottom left corner of the Address Book screen.   It is recreated here for your reference.

7. Click the down arrow to select an existing skill from the drop-down list.   If the skill is not in the list, type the new item in the Skill box.   The new skill is added to the database when you add the new contact.   You can also click the small button next to the skills drop-down box to add the new skill through Lookup Tables.

8. Click the Skills **Add** button.   The skill is added to the contact's list box.   You can attach as many skills to a contact as is appropriate.

9. When you are finished entering all of the contact's information, click the **Address Book Add** button which is located in the upper right portion of the module screen.   This saves all of the information for the contact to the database.

10. To enter another new contact, click the **Clear** button to give you a blank screen.

Add Contact Notes

1. You can add comments or notes about a contact in the Notes box.   This can be any information that will be helpful to you such as special days or hours the contact is available, spouse name, birthday, quality of work, etc.   You can add up to 256 characters in the Notes box.

2. If the contact is a contractor, enter his/her hourly rate in the Rate box.

Modify Contact Information

1. Select the contact's organization from the drop-down list, or click the small button next to Organization to select from Lookup Tables.

2. Click the **Find** button.   The number of located contacts is displayed in the Found box.   Select the name of the person whose information you want to modify from the Contact drop-down box.   You can also scroll through these contacts by using the first, previous, next, or last buttons located in the bottom right portion of the module.

3. Modify or add information for this contact.

4. When finished, click the **Update** button to save your changes.

Delete a Contact

1. Select the contact's organization from the drop-down list, or click the small button next to Organization to select from Lookup Tables.

2. Click the **Find** button.   The number of located contacts is displayed in the Found box.   Select the name of the person whose information you want to delete from the Contact drop-down box. You can also scroll through these contacts by using the first, previous, next, or last buttons located in the bottom right portion of the module.

3. Click the **Delete** button.

   NOTE: You won't be able to delete a contact if he/she is associated with an issue.   This is done to maintain the issue history.

Use Existing Contact Information as a Template

You may have a number of contacts at the same organization.   Rather than clearing the Address Book screen and starting from scratch, you can use the information for a current contact as a template, and then edit it.

1. Select the organization you want from the Organization drop-down box, or click the small button next to Organization to select from Lookup Tables.

2. Click the **Find** button.   The number of located contacts is displayed in the Found box.

3. Select one of the contacts from the Contact drop-down list.

4. Change the contact name and any other appropriate information.

5. Click the **Add** button.   This adds the new contact, but does not change the information for the contact that you used as a template.

Assign Skills to a Contact

You can specify what skills, expertise, or knowledge a contact might have.   Skills can include mechanical, plumbing, programming, bookkeeping, painting, etc.   This information is useful when you need to find individuals with the right skills and know-how to help resolve an issue.

1. Select an existing skill from the Skills drop-down list, or click the small button next to Skills to select from Lookup Tables.

2. Click the Skills **Add** button.   The skill is added to the contact's list box.   You can attach as many skills to a contact as is appropriate.

3. If you want to remove a skill from a contact, select the skill from the contact's list box.   Click the **Delete** button.

Use the Search Engine to Find a Contact or Groups of Contacts

The Search Engine provides a flexible and powerful way to find people and companies in the Address Book.   Just about any criteria can be used to find information.

The Search Engine supports "wildcards" so that it is possible to enter just a few letters of a criterion in order to find possible matches.   A question mark (?) stands for any single character and an asterisk (*) stands for a number of characters.   Wildcards can be placed before, after, or in the middle of other characters.

In the following examples a single criterion at a time is used for searching.   Please keep in mind that you may narrow the amount of search results by using multiple search criteria at the same time.

The Address Book module lets you search for people based on first or last name, skill, area code, phone extensions, a partial phone number, city, state, zip code, and just about anything else that the screen has an entry field for.   The Found box displays the number of contacts that meet your search criteria.

Search on Name

Search by Telephone Number

Search by Address

Search for Contact by Organization

Search on Contact Type

Search on Title or Identifier

Search on Skill

Search on Name

Search on Last Name

1. Click the **Clear** button.   This gives you a blank Address Book screen.

2. If you wanted to find a contact with the last name Scott, but you didn't know their first name, enter ***Scott** in the Contact box.   The asterisk represents all characters before "Scott."

3. Click the **Find** button.   The search engine will find all contacts with Scott as the last name. Because the asterisk is placed at the beginning, it will also find names that have "Scott" within them (e.g., Greg McScott).   When multiple records are found, you can scroll through the records by using the first, previous, next, or last buttons located in the bottom right corner of the module.

Search by Partial Name

1. Click the **Clear** button to give you a blank Address Book screen.

2. You might not be sure how to spell a contact name.   The Search Engine lets you enter a portion of the name.   For example, enter ***cot*** in the Contact box.   The asterisks represent all characters before and after "cot."

3. Click the **Find** button.   The Search Engine will find all contacts that have "cot" someplace in their name (e.g., Alan Westcott, Chris Scott, and Ascot Jones).   When multiple records are found, you can scroll through the records by using the first, previous, next, or last buttons located in the bottom right corner of the module.

Search on First Name

1. Click the **Clear** button to give you a blank Address Book screen.

2. A customer calls and tells you his name is Chris, but he doesn't give you his last name.   Enter **Chris*** in the Contact box.   The asterisk represents all characters after "Chris."

3. Click the **Find** button.   The Search Engine will find all records for Contacts whose first name begins with "Chris" (e.g., Chris Jones, Christina Alcott, and Christopher Scott).   When multiple records are found, you can scroll through the records by using the first, previous, next, or last buttons located in the bottom right corner of the module.

Search by Telephone Number

1. Click the **Clear** button to give you a blank Address Book screen.

2. You need to find a contact with a 714 area code.   Enter ***714*** in the Office phone number box. The asterisks represent all characters before and after "714."

3. Click the **Find** button.   The Search Engine will find all records for Contacts with a 714 area code for their work phone number.   When you place an asterisk before and after the number, it doesn't matter if the phone number is entered as (714) or 714 or 714-.   When multiple records are found, you can scroll through the records by using the first, previous, next, or last buttons located in the bottom right corner of the module.

4. Click the **Clear** button to give you a blank Address Book screen.

5. You want to find a contact but you are not sure of the area code.   You do know that the area code was entered with parentheses.   Enter (**21?)*** in the Office or Home phone number box.   The question mark represents one character, while the asterisk represents multiple characters.

6. Click the **Find** button.   The Search Engine will find all records with area codes that begin with "21."   If you're not sure how area codes are entered, you can type in ***21?*.**   Entering it this way will give you a different search result.   Not only will you get records with area codes that begin with "21," but you will also get records with phone numbers that end with 21_, or that have 21_ embedded in the middle of the number.

Search by Address

Search by Zip Code

1. Click the **Clear** button to give you a blank Address Book screen.

2. To see records for all contacts with a particular zip code, enter the zip code followed by an asterisk in the Zip data entry box (e.g., 80027*).   The asterisk represents all characters after "80027."

3. Click the **Find** button. When you use the asterisk, the Search Engine finds all records that have been entered with five or with ten zip code characters (e.g., 80027 or 80027-8140). When multiple records are found, you can scroll through the records by using the first, previous, next, or last buttons located in the bottom right corner of the module.

Search by City

1. Click the **Clear** button to give you a blank Address Book screen.

2. Enter a city in the City data entry box.

3. Click the **Find** button.   If you want to type just a part of a city name, use an asterisk (e.g., *ville, Louis*, *Louis*). When multiple records are found, you can scroll through the records by using the first, previous, next, or last buttons located in the bottom right corner of the module.

Search by State

1. Click the **Clear** button to give you a blank Address Book screen.

2. Enter the two-character state code in the State/Province data entry box.

3. Click the **Find** button. If you are not sure of the state code, just type one character with an asterisk (e.g., *N, C*).   The Search Engine will find all contacts that are located in a state with a code that either begins or ends with the letter you entered. When multiple records are found, you can scroll through the records by using the first, previous, next, or last buttons located in the bottom right corner of the module.

Search by Street Address, Country, Department

1. Click the **Clear** button to give you a blank Address Book screen.

2. You may want to search using several fields. For example, you may want to find contacts in a specific country and in a specific department, but you don't know the complete address.   Enter a portion of the address in the Address1 data entry box.   Use an asterisk before or after the address to represent the portion you aren't sure of (e.g., *Broadway, *Main*).   Enter the country in the Country box and the department in the Dept/MS box. When multiple criteria are used, the Search Engine looks for contacts that meet **ALL** the criteria.

3. Click the **Find** button. When multiple records are found, you can scroll through the records by using the first, previous, next, or last buttons located in the bottom right corner of the module.

Search for Contact by Organization

Search by Organization

1. Click the **Clear** button to give you a blank Address Book screen.

2. Select an organization from the Organization drop-down list, or click the small button next to Organization to select from Lookup Tables.   You can also enter all or a portion of the organization name in the Organization data entry box.   Use an asterisk before or after the name to represent the portion you didn't include (e.g., *Data*, Scott Data*).

3. Click the **Find** button. When multiple records are found, you can scroll through the records by using the first, previous, next, or last buttons located in the bottom right corner of the module.

Search by Organization Using Lookup Tables

1. Click the **Clear** button to give you a blank Address Book screen.

2. Click the small box next to the organization drop-down box to open the organizations Lookup Table.   **Double-click** the organization you want.   The Lookup Table will close.

3. Click the **Find** button. When multiple records are found, you can scroll through the records by using the first, previous, next, or last buttons located in the bottom right corner of the module.

Search by Organization Using the Drop-Down List

1. Click the **Clear** button to give you a blank Address Book screen.

2. Click the **Organization drop-down arrow** to see the list of organizations.   Select the organization you want.

3. Click the **Find** button. When multiple records are found, you can scroll through the records by using the first, previous, next, or last buttons located in the bottom right corner of the module.

Search on Contact Type

Search on Contact Type

1. Click the **Clear** button to give you a blank Address Book screen.

2. Enter a type of contact in the Contact Type box (e.g., employee, vendor, customer, or tenant).

3. Click the **Find** button. When multiple records are found, you can scroll through the records by using the first, previous, next, or last buttons located in the bottom right corner of the module.

Search on Contact Type Using Lookup Tables

1. Click the **Clear** button to give you a blank Address Book screen.

2. Click the small box next to the contact type drop-down box to open the Lookup Table.   **Double-click** the contact type you want (e.g., employee, vendor, customer, tenant).   The Lookup Table will close.

3. Click the **Find** button. When multiple records are found, you can scroll through the records by using the first, previous, next, or last buttons located in the bottom right corner of the module.

Search on Contact Type Using the Drop-Down List

1. Click the **Clear** button to give you a blank Address Book screen.

2. Click the **Contact Type drop-down arrow** to see the selection list.   Select the contact type you want (e.g., customer, employee, tenant, or vendor).

3. Click the **Find** button. When multiple records are found, you can scroll through the records by using the first, previous, next, or last buttons located in the bottom right corner of the module.

Search on Title or Identifier

Search on Title

1. Click the **Clear** button to give you a blank Address Book screen.

2. Enter all or a portion of the title in the Title data entry box.   Use an asterisk before or after the title to represent the portion you didn't include (e.g., Sales*, *Manager).

3. Click the **Find** button. When multiple records are found, you can scroll through the records by using the first, previous, next, or last buttons located in the bottom right corner of the module.

Search on Identifier

1. Click the **Clear** button to give you a blank Address Book screen.

2. Some contacts, such as internal employees, may have an ID number or a unique number (e.g., social security) to identify them.   Enter all or a portion of the number in the Identifier data entry box.   Use an asterisk before or after the number to represent the portion you didn't include (e.g., *006, 532*).

3. Click the **Find** button. When multiple records are found, you can scroll through the records by using the first, previous, next, or last buttons located in the bottom right corner of the module.

Search on Skill

Search on Skill

1. Click the **Clear** button to give you a blank Address Book screen.

2. Enter all or a portion of a skill in the Skills data entry box.   Use an asterisk before or after the skill to represent the portion you didn't include (e.g., Data*, *Support).

3. Click the **Find** button. When multiple records are found, you can scroll through the records by using the first, previous, next, or last buttons located in the bottom right corner of the module.

Search on Skill Using Lookup Tables

1. Click the **Clear** button to give you a blank Address Book screen.

2. Click the small box next to the skills drop-down box to open the Lookup Table.   **Double-click** the skill you want.   The Lookup Table will close.

3. Click the **Find** button. When multiple records are found, you can scroll through the records by using the first, previous, next, or last buttons located in the bottom right corner of the module.

Search on Skill Using the Drop-Down List

1. Click the **Clear** button to give you a blank Address Book screen.

2. You may want to search using multiple skills.   Click the **Skills drop-down arrow** to see the selection list.   Select the skill you want.   Click the **Skills Add** button.

3. Click the Skills drop down arrow to open the selection list again.   Select another skill.   Click the **Skills Add** button.

4. Click the **Find** button.   The Search Engine looks for all contacts that have both skills. When multiple records are found, you can scroll through the records by using the first, previous, next, or last buttons located in the bottom right corner of the module.

   NOTE: When only one criterion is set, the search engine looks for all records that match.   This usually results in a broader and therefore larger number of records. When multiple criteria are set the search engine looks for contacts that match ALL of the criteria.   This narrows the search and usually results in fewer records.

Print Contact SnapShot Report

You may want to print out information for just one contact.   You can do this directly from the Address Book module.

1. Select the organization you want from the Organization drop down box, or click the small button next to the organization drop-down box to select from Lookup Tables.   Click the **Find** button.   The number of located contacts is displayed in the Found box.

2. Select one of the contacts from the Contact drop-down list. You can also scroll through the found records by using the first, previous, next, or last buttons located in the bottom right corner of the screen.

3. Click the **Preview** button to see the report before it is printed.

4. Click the **Print** button to get a SnapShot Report for this contact.

View Contracts From Address Book

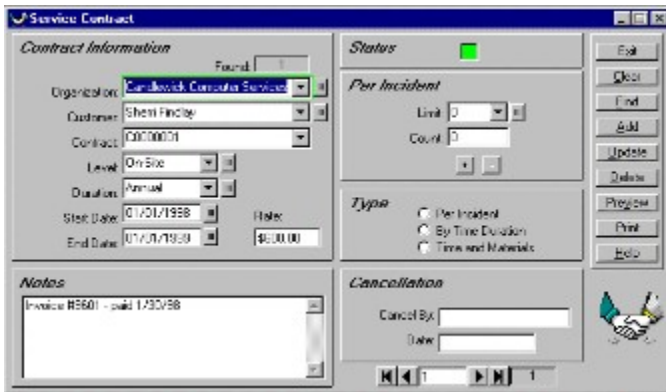While you are in Address Book, you may want to view the current contracts for a particular organization.

1. Select the organization you want from the Organization drop-down box, or click the small button next to Organization to select from Lookup Tables.

2. Click the **View Contracts** button.   SDS HelpDesk conducts a search for all associated contracts and then opens and displays the information in the Service Contract module.   If there is no associated contract, the Service Contract module opens with the organization name pre-loaded into the screen.   You can then enter a new contract.   When finished with the Service Contract module, click the **Exit** button to return to Address Book.

View Issues from Address Book

While you are in Address Book, you may want to view the issues for a particular organization or contact.

1. Select the organization you want from the Organization drop-down box, or click the small button next to Organization to select from Lookup Tables.

2. If you want to view the issues for a particular contact, click the **Find** button.   If there is more than one contact for this organization, select the contact you want from the drop-down box.

3. Click the **View Issues** button.   SDS HelpDesk conducts a search for all associated issues.   It then opens the Issue Manager module and displays an issue list.   Single-click any issue in the list for a quick view of key information.   If there are no issues, the Issue Manager module opens with the organization name (and contact name if you selected it in Address Book) pre-loaded into the screen. Click the issue list **Hide** button.   You can then enter a new issue.   When finished with the Issue Manager module, click the **Exit** button to return to Address Book.

Contract Manager Overview

Most companies that provide some kind of extended product or technical support do so on a service contract basis.   Support contracts can cover different service levels, such as unlimited, on-site, warranty, per incident, etc.   Service contracts can also cover different time durations, such as annual, quarterly, 90 day, etc.

SDS HelpDesk can manage all of your organization's service contracts.   When a customer requests help, you no longer have to guess or call another department to check the contract status.   Service Contract Manager automatically verifies whether a contract is still valid and lets you know directly from the Issue Manager module.

Click the **Service Contracts** icon   in the toolbar to open the module.

The green box around the Organization field indicates that this is a mandatory field and must be filled in for each contract.

Steps to . . .

Add a New Service Contract

Modify a Service Contract

Cancel a Service Contract

Delete a Service Contract

Add or Modify Per-Incident Blocks

Use the Search Engine to Find a Service Contract

Print SnapShot Report
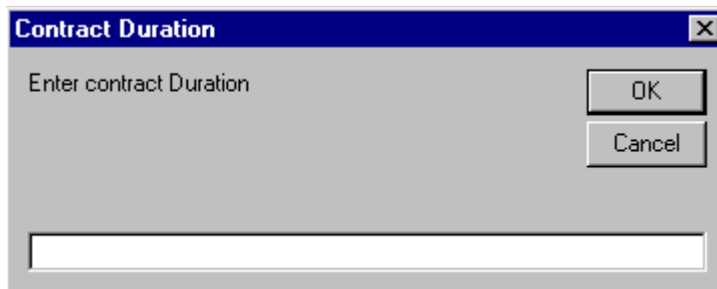
Add a New Service Contract

With SDS HelpDesk you can add multiple service contracts for an organization, add different service levels, and different time durations for each level.   You can also enter the rate to charge a customer for a contract, add notes about the contract, or track per-incident usage.

Your system administrator needs to set a format for service contract codes.   Contract codes can include fixed text, date, company ID, etc. as well as an incrementing counter.   If you are the system administrator and have not yet set the format, see Format Contract Numbers for details on how to do this.

1. Select the organization name from the Organization drop-down list, or click the small button next to Organization to select from Lookup Tables.   If there is a contact at the organization, the name is entered for you automatically.

2. Select a service level from the Level drop-down list, or click the small button next to Level to select from Lookup Tables.   Service levels can include such items as unlimited, limited, warranty, per-incident, phone support, on-site, etc.

3. Select a time period that the service contract is in effect from the Duration drop- down list, or click the small button next to Duration to select from Lookup Tables.   Duration can include such items as Annual, 30-day, Quarterly, etc.

   NOTE: If you add a new duration on-the-fly (type the duration into the edit box), when you save the contract the following dialog box will open.   Enter the number of days the period covers.
   EXAMPLE: If you add "Quarterly" as a duration, enter 90 in the dialog box.   Click OK.

4. Enter the date that the contact takes effect in the Start Date box.   The Service Contract Manager automatically calculates and enters the end date for you.

5. If this is a per-incident contract, select the number of incidents covered by the contract from the Limit drop-down list, or click the small button next to Limit to select from Lookup Tables.

6. Select the appropriate contract Type radio button.

7. Enter any appropriate contract notes in the Notes area.

8. When finished, click the **Add** button.   A new contract number is displayed in the Contract field. When a contract is valid, the Status box turns green.   If a contract is not valid, the Status box remains red.

9. To enter another contract, click the **Clear** button to give you a blank screen.

Modify a Service Contract

You will need to modify the service contract information whenever a contract comes up for renewal. The Status box turns red when the contract expires or is cancelled.

1. Select the organization from the Organization drop-down list, or click the small button next to Organization to select from Lookup Tables.

2. If there is only one contract for this organization, it is displayed.   If there are multiple contracts, select the one you want to modify from the Contract drop-down list.   You can also scroll through the contracts by using the first, previous, next or last buttons located in the bottom right corner of the module.

3. Modify the contract information as needed.

4. When finished, click the **Update** button to save your changes.

Cancel a Service Contract

If a customer cancels a service contract, you can enter the date, the name of the person who canceled it, and any pertinent information as to the reason for the cancellation.

1. Select the organization from the Organization drop down list, or click the small button next to Organization to select from Lookup Tables.

2. If there is only one contract for this organization, it is displayed.   If there are multiple contracts, select the one being canceled from the Contract drop down list. You can also scroll through the contracts by using the first, previous, next or last buttons located in the bottom right corner of the module.

3. Enter the name of the person who is canceling the contract in the Cancel By box.

4. Enter the effective date of the cancellation in the Date box.

5. Click the **Update** button.   The Status box turns red.   The Contract box in Issue Manager also turns red for this organization.

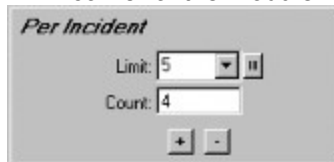## Delete a Service Contract

In most cases, you want to maintain a record of your active and inactive service contracts.   On occasion you might need to delete a service contract that never went into effect.

1. Select the organization from the Organization drop down list, or click the small button next to Organization to select from Lookup Tables.

2. If there is only one contract for this organization, it is displayed.   If there are multiple contracts, select the one you want to delete from the Contract drop down list. You can also scroll through the contracts by using the first, previous, next or last buttons located in the bottom right corner of the module.

3. Click the **Delete** button.

Add or Modify Per-Incident Blocks

Most per-incident service contracts allow customers to purchase issue blocks.   In these cases, a customer pays a set amount, up-front, to cover the current issue and/or a number of future issues. SDS HelpDesk lets you track the number of issue blocks purchased and used.

1. Select the organization from the Organization drop down list, or click the small button next to Organization to select from Lookup Tables.

2. If there is only one contract for this organization, it is displayed.   If there are multiple contracts, select the appropriate per-incident contract from the Contract drop down list. You can also scroll through the contracts by using the first, previous, next or last buttons located in the bottom right corner of the module.

NOTE: Steps 3 and 4 refer to a portion of the Service Contract Manager screen.   It is recreated here for your reference.

3. Select the number of issues covered by the contract from the Limit drop down list, or click the small button next to Limit to select from Lookup Tables.   If this is a new contract, click the **Add** button. If you are modifying a current contract, click the **Update** button to save your changes.

4. When a customer calls with a new issue, the number in the Count box is adjusted automatically. The Status box on the Service Contract Manager screen remains green until the number in the Limit box is reached.

    There may be times when you need to increase or decrease the number of issues used (e.g., if you need to reopen a previous issue, or if a customer is not satisfied that the issue has been resolved).   Click the ▪ or
▪ buttons to change the number used.   Click the **Update** button to save your changes.

Use the Search Engine to Find a Service Contract

The Search Engine provides a flexible and powerful way to find service contracts.   It supports "wildcards" so that it is possible to enter just a few letters of a criterion in order to find possible matches.   A question mark (?) stands for any single character and an asterisk (*) stands for a number of characters.   Wildcards can be placed before, after, or in the middle of other characters.

In the following examples a single criterion at a time is used for searching.   Please keep in mind that you may narrow the amount of search results by using multiple search criteria at the same time.

The Service Contract module lets you search for contracts based on contract number, organization, contract level, duration, start or end dates.   The Found box displays the number of service contracts that meet your search criteria.

Search by Contract Number

Search for Contact by Organization

Search by Contract Level

Search by Contract Duration

Search by Contract Number

Search by Contract Number

1. Click the **Clear** button to give you a blank Contract screen.
2. Enter a number in the Contract data entry box.
3. Click the **Find** button.

Search for Contract by Organization

Search by Organization

1. Click the **Clear** button to give you a blank Service Contract screen.

2. Select the organization from the Organization drop-down list, or click the small button next to Organization to select from Lookup Tables.

3. Click the **Find** button.   When multiple records are found, you can scroll through the contracts by using the first, previous, next or last buttons located in the bottom right corner of the module.

Search by Organization Using Lookup Tables

1. Click the **Clear** button to give you a blank Service Contract screen.

2. Click the small button next to Organization to open the Lookup Table.   **Double-click** the organization you want.   The Lookup Table will close.

3. Click the **Find** button.   When multiple records are found, you can scroll through the contracts by using the first, previous, next or last buttons located in the bottom right corner of the module.

Search by Organization Using the Drop-Down List

1. Click the **Clear** button to give you a blank Service Contract screen.

2. Click the **Organization drop-down arrow** to see the list of organizations.   Select the organization you want.

3. Click the **Find** button.   When multiple records are found you can scroll through the contracts by using the first, previous, next or last buttons located in the bottom right corner of the module.

Search by Contract Level

Search by Contract Level Using the Drop-Down List

1. Click the **Clear** button to give you a blank Service Contract screen.

2. Click the **Level drop-down arrow** to see the list of Contract Levels.   Select the service level you want (e.g., Basic, Warranty, or Per-Incident).

3. Click the **Find** button.   When multiple records are found you can scroll through the contracts by using the first, previous, next or last buttons located in the bottom right corner of the module.

Search by Contract Level Using Lookup Tables

1. Click the **Clear** button to give you a blank Service Contract screen.

2. Click the small button next to Level to open the Lookup Table.   **Double-click** on the service level you want (e.g., Basic, Extended, or Per-Incident).   The Lookup Table will close.

3. Click the **Find** button.   When multiple records are found you can scroll through the contracts by using the first, previous, next or last buttons located in the bottom right corner of the module.

Search by Contract Duration

Search by Contract Duration Using the Drop-Down List

1. Click the **Clear** button to give you a blank Service Contract screen.

2. Click the **Duration drop-down arrow** to see the list of contract durations.   Select the duration you want.

3. Click the **Find** button.   When multiple records are found you can scroll through the contracts by using the first, previous, next or last buttons located in the bottom right corner of the module.

Search by Contract Duration Using Lookup Tables

1. Click the **Clear** button to give you a blank Service Contract screen.

2. Click the small button next to Duration to open the Lookup Table.   **Double-click** on the duration you want (e.g., Annual, Monthly, Semi-Annual).   The Lookup Table will close.

3. Click the **Find** button.   When multiple records are found you can scroll through the contracts by using the first, previous, next or last buttons located in the bottom right corner of the module.

Print Contract SnapShot Report

You may want to print out information for a contract.   You can do this directly from the Service Contract module.

1. Select the organization from the Organization drop down list, or click the small button next to Organization to select from Lookup Tables.

2. If there is only one contract for this organization, it is displayed.   If there are multiple contracts, select the appropriate contract from the Contract drop-down list. You can also scroll through the contracts by using the first, previous, next or last buttons located in the bottom right corner of the module.

3. Click the **Preview** button to see the report before it is printed.

4. Click the **Print** button to get a SnapShot Report for this contract.

Issue Manager Overview

The Issue Manager module is the heart of SDS HelpDesk.   It is the module you use whenever you talk with a customer.   When a customer contacts you for support, you log it in as an "**issue**."   An issue can be a problem, a how-to question, a suggestion, a broken piece of equipment, a program bug, etc.

Issue Manager lets you categorize issues any way you want to.   It then automates the collection of related information and tracks the issue until it is resolved.   Once resolved, you can add the final solution to the knowledge base so that others can use it.

The Issue Manager module lets you see and do a lot of things from one screen.   You can:

n   Record new issues and track the progress to their resolution.

n   See a history of all events related to an issue including status changes, escalations, or changes in priority.

n   Attach supporting files such as word processing documents, faxes, spreadsheets, CAD drawings, etc.

n   Set up issue work groups.   A work group exists solely for the purpose of resolving a single issue.

n   Be notified of any issues that have been sent to you by other work group members for your input.

n   Communicate with other work group members through the built-in messaging system.

n   See immediately whether a customer's service contract is valid.   If you need to see the details, you can launch the Service Contract module directly from Issue Manager.

n   Track the amount of time it takes to resolve an issue.

n   See quick views of key issue information.

n   Use a current issue as a template for a new issue.

n   Add the category, location, problem, and solution for resolved issues to the knowledge base

n   Use the powerful search engine to quickly scan other issues or the knowledge base for solutions.

n   Print SnapShot and professional reports that summarize key issue information.

Click the Issue Manager icon in the toolbar to open the module.
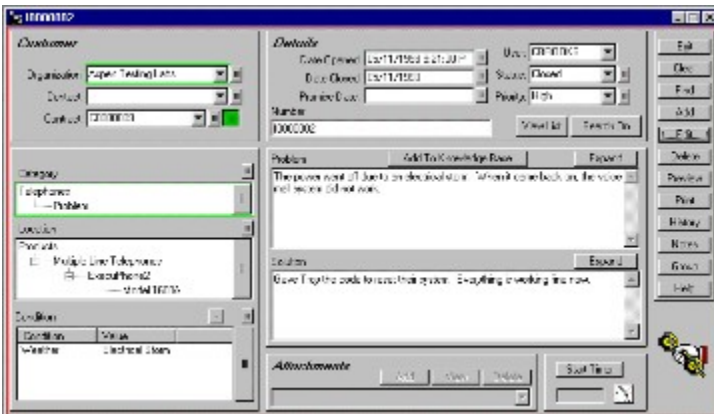
The green boxes around the Organization and Category fields indicate that these are mandatory fields and must be filled in for each issue.

▪ Steps to . . .

[Add a New Issue](#)

[Modify an Issue](#)

[Delete an Issue](#)

[Add to the Knowledge Base](#)

[Use the Issue Manager Search Screen](#)

[Add or Delete Issue Conditions and Values](#)

[Verify or View Service Contract Information](#)

[Add, View, or Delete Attachments](#)

[View and Add to Issue History](#)

[Issue Work Groups](#)

[Communicating with Work Group Members](#)

[View Issues and Messages Sent to you by Work Group Members](#)

[Use the Search Engine to Find an Issue](#)

[Start Issue Timer](#)

[Print SnapShot Report](#)

Add a New Issue

When a customer calls with a new issue, you want to be able to gather information quickly so you can begin to resolve the issue right away. **SDS HelpDesk does not require very much information to enter a new issue. The only two mandatory fields are the organization and an issue category. At a minimum, you should enter a category, the organization, the user, and a description of the issue.** The more information you can enter, the more useful Issue Manager will be to you.

The following steps assume you are adding all of the issue information at once.

1. Select the organization name from the Organization drop-down list, or click the small button next to Organization to select from Lookup Tables. Once selected, SDS HelpDesk automatically searches for the contacts at that organization and for associated service contracts. Select the name of the contact with an issue to report from the Contact drop-down list.

2. Check the box to the right of Contract to see if the organization has a valid service contract. The box is green if the contract is valid, red if it is not. **You will need to refer to your company policy on how to proceed if the organization does not have a valid service contract.** If you need to see the contract details, just click the small button next to Contract to open the Contract Manager module.

3. Ask your customer for a description of the issue. Type a summary in the Problem box.

   NOTE: The Problem and Solution boxes expand when you click the Expand buttons. Once expanded, click the Shrink button to return to box to its normal size.

4. Most issues can be grouped into general categories such as product defect, how-to question, feature wish, warranty work, broken equipment, etc. These groupings give you a quick way to track and compare similar issues. Some issues can be broken down further into subcategories. For example, if you have a category called Broken Equipment, you might have multiple subcategories called Copy Machines, Plumbing, Personal Computers, etc.
   Click the large button that is next to the Category box to display the drop-down tree. A plus (+) next to a category means that it has one or more subcategories. Click the plus (+) to see the subcategory level. Double-click an appropriate category or subcategory. If you double-click on a subcategory, it and the category it is associate with are entered for you automatically.

   NOTE: You can also click the small button to select the category and/or subcategory from Lookup Tables.

5. The Location box is used to identify where an issue has occurred. You can select up to four location levels. As you go down each level, the issue location gets more precise.

   EXAMPLE 1: If you develop a product, the highest level might be Product Name. The next level could be Model Number. The third level might be Product Area (e.g., motor, screen), and the fourth level could be Part Number.

   EXAMPLE 2: If you handle facilities management for several apartments, your highest level might be Complex Name. The next level could be Building Number, level three could be Apartment Number, and level four, item (e.g., bedroom window, bathroom plumbing).

   Click the large button that is next to the Location box to display the drop-down tree. A plus (+) next to a location means that it has one or more levels below it. Click the plus (+) to see the next level. Double-click an appropriate level from the tree and all the higher levels are filled in for you automatically.

   NOTE: You can also click the small button to select the location from Lookup Tables.

6. You can record various conditions that may have an influence on an issue. For example, manufacturing environments have different production lines, multiple labor shifts, and different tools or machinery. Like categories, each of these "conditions" can have multiple subcategories, called "values." For the condition labor shifts, we can have multiple values such as Day, Evening, Graveyard, etc.

Click the large button that is next to the Condition box to display the drop-down tree.   A plus (+) next to a condition means that it has one or more values.   Click the plus (+) to see the values.   Double-click an appropriate value from the tree and it and the condition are filled in for you automatically.

NOTE: Unlike the Category and Location drop-down trees, the Condition drop-down tree does not automatically close.   This is because you may want to enter multiple conditions.   Click the large button to close the tree.   You can also click the small button to select conditions and values from Lookup Tables.

7. Select your User Name from the User drop-down box.

8. Since this is a new issue, select **Open** from the Status drop-down list, or click the small button next to Status to select from Lookup Tables.

9. You can indicate this issue's importance by selecting a priority from the Priority drop-down list, or click the small button next to Priority to select from Lookup Tables.

10. The Date Opened field is filled in automatically for you when the issue is added.

11. When you have finished adding the minimum information and any other information that may be necessary for you to resolve the issue, click the Issue Manager **Add** button.

12. If you need to track the time that it takes to resolve the issue, click the **Start Timer** button that is located in the bottom right portion of the module.   To stop the timer, click the button again (it now says **Stop Timer**).   Once stopped, the Time Sheet Entry dialog box opens.   It displays the start and stop times and the actual time spent on the issue.   If you bill your customers for the time spent resolving an issue, select the "**Yes**" radio button.   Select the "No" radio button if you do not bill based on time.   You can modify the time displayed in the Charge Following Time box since some companies charge only for full hours while others may round the time to the nearest quarter hours, etc.   Click the Task down arrow to charge time to a particular task.   Click the **Make Time Entry** button to record the time to resolve the issue.

13. When another customer calls and you need to enter a new issue, click the **Clear** button to give you a blank screen.

Modify an Issue and Enable Record Locking

Enable Record Locking
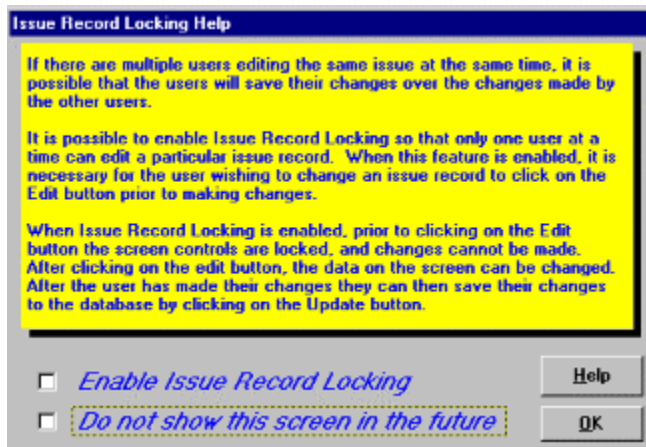
When you open the Issue Manager module you will see the Record Locking screen.   This dialog box is used to enable the record-locking feature.   Record locking is used primarily in multi-user environments.   Once enabled, it protects issues from being modified by multiple users at the same time.   If your organization chooses to enable record locking, a narrow red border surrounds the Issue screen, the screen controls are locked, and users must click the **Edit** button before modifying an issue.   Once the **Edit** button is clicked, the border turns green, the screen controls are unlocked, and changes can be made to the issue.   Click the **Update** button to save your changes.

Modify an Issue

Once you enter an issue into SDS HelpDesk, your primary goal is to resolve it as quickly as possible.   You may be able to offer a solution while the contact is still on the phone, or you may have to research the issue, or consult with another expert.   Whatever the case, you will need to modify the issue record and document the solutions you suggest.   You can also modify any previously entered information.

1. Select the organization name from the Organization drop-down list, or click the small button next to Organization to select from Lookup Tables.

2. Once the organization is selected, click the **Find** button. SDS HelpDesk conducts a search for all associated issues.   It then displays a list of issues in a pop-up screen.   Single-click any issue in the list for a quick view of key information.   When you find the issue you want to modify, click the **Sel** button on the quick view screen.   This loads the selected issue into the Issue Manager screen. If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen.   Select another issue from the list.

   NOTE: If your organization enabled the record-locking feature, you will need to click the Edit button before modifying an issue.

3. Modify or add information to the issue.

4. Type a description of your suggestion or solution into the Solution box.   Include any information that you might find helpful.   You can also use the <u>Attachment</u> function to include other relevant documents.

   NOTE: The Problem and Solution boxes expand when you click the Expand buttons.   Once expanded, click the Shrink button to return to box to its normal size.

5. When you have finished adding your initial solution, or have modified any of the other issue information, click the **Update** button to save your changes.

6. Click the **Clear** button to give you a blank screen.

Delete an Issue

In most cases, you will only delete an issue that you really don't want.   This may be an issue that has been duplicated by accident, or entered for the wrong organization.

1. Select the organization name from the Organization drop-down list, or click the small button next to Organization to select from Lookup Tables.

2. SDS HelpDesk conducts a search for all associated issues.   It then displays a list of issues in a pop-up screen.   Single-click any issue in the list for a quick view of key information.   When you find the issue you want to delete, click the **Sel** button on the quick view screen.   This loads the selected issue into the Issue Manager screen.   If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen.   Select another issue from the list.

1. Click the **Delete** button.   Once you delete an issue, you will not be able to get it back.

Add an Issue to the Knowledge Base

The SDS HelpDesk Knowledge Base is used to store and retrieve answers to repeat questions.   It can be used to maintain step-by-step instructions, scripts, system configuration information, part numbers, lists of tools and materials to do a job, and just about anything else desired.

You can pre-load the knowledge base with information, or build it up over time as issues are entered and resolved.   Then use the search engine to quickly scan issues or the knowledge base for the solution or information you need.

1. Select the organization name from the Organization drop-down list, or click the small button next to Organization to select from Lookup Tables.

2. SDS HelpDesk conducts a search for all associated issues.   It then displays a list of issues in a pop-up screen.   Single-click any issue in the list for a quick view of key information.   When you find the issue you want to add to the Knowledge Base click the **Sel** button on the quick view screen. This loads the selected issue into the Issue Manager screen.   If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen.   Select another issue from the list.

3. Once you find the issue you want, click the **Add to Knowledge Base** button located above the Problem box.   This copies the issue category, location, problem and solution information into the Knowledge Base.

Use the Issue Manager Search Screen

You use the Issue Manager search screen to conduct searches of other issues or the Knowledge Base.

1. Click the **Search On** button located in the upper right portion of the module.   This overlays the following screen onto the problem and solution area.

2. You can search on problem and/or solution keywords. To search on Problem keywords, enter a keyword into the first box.   Check the **small box** in the upper right corner.   This sets the keyword as a search criterion.

3. Click the **Issue icon** button to search current issues for the keyword.   Click the **Knowledge Base** icon button to search knowledge base items for the keyword.   The search results are displayed in the issue list pop-up screen.   Single-click an issue to see a quick view of the key information.

4. You can add another keyword to the second box.   If you select the **Add** radio button, the search engine looks for problems that contain both keywords.   If you select the **Or** radio button, the search engine looks for problems that contain either keyword.

5. Click the **Clear Section** button to conduct a different search.   You can follow the above steps to search on solution keywords.

   NOTE: If you want to search on a problem keyword and a solution keyword, enter the keyword into each of the first boxes.   Check both small check boxes.   Then click either the Issue or the Knowledge Base icon button.

6. You can also search on the Issue Open and/or Closed date.   Either select one of the date selection radio buttons, or type in the date(s) you want, or click the small buttons next to the date data entry boxes to select a date from the calendar.   Check the **check box** in the upper right corner to set the search options.   Then click one of the icon buttons.

7. In addition to keywords and dates, you can also use the organization, contact, contract, category, location, condition, user, status, priority, or issue number fields as search criterion items.   Just be sure to check the small check box on each item that you want to include in your search criteria.

   NOTE: The more items you include in your search criteria, the narrower your search results.

Add or Delete Issue Conditions and Values

Different conditions can influence or even cause an issue. For example, temperature, humidity, and weather can affect certain pieces of equipment. Like categories, each of these "conditions" can have multiple subcategories, called "values." If you choose the condition temperature, it can have multiple values such as normal, < 32 degrees F, or > 32 degrees F.
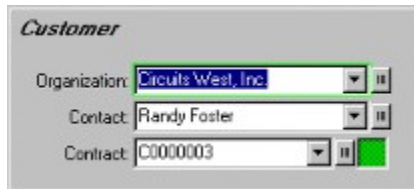
When you enter an issue, you can include the conditions and values that were in effect when the issue occurred. This helps you determine whether an issue occurs under all conditions or only under certain conditions.

1. Select the organization name from the Organization drop-down list, or click the small button next to Organization to select from Lookup Tables.

2. SDS HelpDesk conducts a search for all associated issues. It then displays a list of issues in a pop-up screen. Single-click any issue in the list for a quick view of key information. When you find the issue you want to add one or more conditions to, click the **Sel** button on the quick view screen. This loads the selected issue into the Issue Manager screen. If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen. Select another issue from the list.

3. Click the large button that is next to the Condition box to display the drop-down tree. A plus (+) next to a condition means that it has one or more values. Click the plus (+) to see the values. Double-click an appropriate value from the tree and it and the condition are filled in for you automatically. You can add as many conditions and values as are appropriate for this issue.

4. To delete a condition from an issue, select the condition from the Condition box. Then click the ▪ button.

5. When you are finished adding or deleting conditions, click the **Update** button to save your changes.

   NOTE: Unlike the Category and Location drop-down trees, the Condition drop-down tree does not automatically close. This is because you may want to enter multiple conditions. Click the large button to close the tree. You can also click the small button to select conditions and values from Lookup Tables.

Verify or View Service Contract Information

One of the first things you should do when a customer calls for support is to verify whether the organization has a valid service contract.   You can do this directly from the Issue Manager screen (that portion of the screen is recreated below for your reference).

1. Select the organization name from the Organization drop-down list, or click the small button next to Organization to select from Lookup Tables.

2. SDS HelpDesk conducts a search for all associated issues.   It then displays a list of issues in a pop-up screen.   Single-click any issue in the list for a quick view of key information.   When you find the issue you want to add one or more conditions to, click the **Sel** button on the quick view screen. This loads the selected issue into the Issue Manager screen.   If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen.   Select another issue from the list.

3. Check the Contracts portion of the Issue Manager screen (located in the upper left corner).   If an organization only has one contract, the number is displayed in the drop down box.   If there are multiple contracts, the numbers are displayed in the drop down list.   Select the appropriate contract. When a service contract is valid, the verify contract box is green.   The box is red if the contract has expired or the organization does not have a contract.

    NOTE: You will need to refer to your company policy on how to proceed with the customer if the service contract is no longer valid or a contract does not exist.

4. If you need to see the details of a contract, click the Contract label to launch the Service Contract module.   It takes you directly to the contract you selected.   When you exit the Service Contract module you are returned to your place in Issue Manager.

Add, View, or Delete Attachments

You can attach supporting files such as word processing documents, spreadsheets, CAD drawings, faxes, etc. to any issue.   SDS HelpDesk lets you add multiple supporting files and view them right from Issue Manager.

1. Select the organization name from the Organization drop-down list, or click the small button next to Organization to select from Lookup Tables.

2. SDS HelpDesk conducts a search for all associated issues.   It then displays a list of issues in a pop-up screen.   Single-click any issue in the list for a quick view of key information.   When you find the issue you want to add one or more conditions to, click the **Sel** button on the quick view screen. This loads the selected issue into the Issue Manager screen.   If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen.   Select another issue from the list.

3. Make sure the supporting file is in a directory you can access when you are in SDS HelpDesk. Some users create a subdirectory under Helpdesk and copy supporting files into it.

4. Click the Attachments **Add** button.   This opens the Locate Attachment dialog box.

5. Use the Look In drop down list to find the folder where the file is located.

6. Select the file you want to attach, then click the **Open** button.   The full path to the file is displayed in the Attachments drop down box.

7. Repeat the process for any additional supporting files you want to add.

8. Click the **Update** button to save the attachments with the issue.

9. You can click the **View** button to see a selected attachment.

10. To delete an attachment, select it from the Attachment drop-down list.   Click the **Delete** button.

11. Click the **Update** button to save your changes.

View and Add to Issue History

Whenever you take action with an issue, you are adding to its history log.   Some actions are added to the history automatically by SDS HelpDesk.   These include when an issue is opened, who enters the issue, status changes, escalations to other work group members, and priority changes.   You can add other information or comments manually that may be helpful.

1. Select the organization name from the Organization drop-down list, or click the small button next to Organization to select from Lookup Tables.

2. SDS HelpDesk conducts a search for all associated issues*.*   It then displays a list of issues in a pop-up screen.   Single-click any issue in the list for a quick view of key information.   When you find the issue you want to add one or more conditions to, click the **Sel** button on the quick view screen.   This loads the selected issue into the Issue Manager screen.   If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen.   Select another issue from the list.

3. Click the **History** button (located on the right side of the Issue Manager module) to open the Issue History dialog box.   The major events that have taken place for this issue are displayed.   Each event has a date and time stamp, and shows who created the event.   Click the **Preview** or **Print** button to get a SnapShot Report of the history log.

4. Click the Issue History **Add** button to open the Add History Remark dialog box.   This dialog box lets you add additional information to the history log.   Click the **Done** button to save the information and return to the Issue History dialog box.

   NOTE: You must use the Add History Remark dialog box to add information manually.   This allows the program to date, time stamp, and record who created the entry.
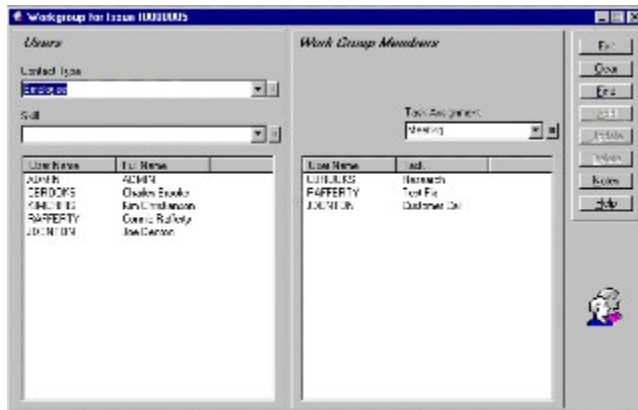
Issue Work Groups

One of the problems in providing an effective support desk is finding the right people with the specific expertise needed to resolve issues. Some of these experts may be in other areas of your own organization. Others may be outside your organization.

SDS HelpDesk lets you form an issue work group. The work group exists solely for the purpose of resolving a single issue. Any internal or external contact can be added to an issue work group. You can select work group members by skill or contact type. You can send an issue to work group members so they can review it and make suggestions. Work group members can communicate with each other by using the built-in messaging system. SDS HelpDesk immediately alerts work group members when an issue is sent to them.

> *NOTE: Contacts must be designated as SDS HelpDesk users before they can be added to a work group.*

1. Select the organization name from the Organization drop-down list, or click the small button next to Organization to select from Lookup Tables.

2. SDS HelpDesk conducts a search for all associated issues. It then displays a list of issues in a pop-up screen. Single-click any issue in the list for a quick view of key information. When you find the issue you want to add one or more conditions to, click the **Sel** button on the quick view screen. This loads the selected issue into the Issue Manager screen. If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen. Select another issue from the list.

3. Click the **Group** button to open the Issue Work Group dialog box.

When you set up your contacts in Address Book, you grouped them by contact type. You also assigned skills or levels of expertise for some of them. These two filters can be used to help you identify which users have the skills needed to resolve the issue.

2. Your SDS HelpDesk users are displayed in the large left-hand box. If needed, you can use the Contact Type drop-down list to select a particular group of users. For example, you may have set up contact types called Outside Contractors, Plumbers, Employees, Vendors, etc. Once you select the contact type, click the **Find** button. The users who belong to that group are listed in the left-hand box.

3. You can use the Skill drop-down list to select a particular skill or expertise that is needed to resolve the issue. Once you select the Skill, click the **Find** button. The users who have been assigned that skill will be listed in the left-hand box.

> *NOTE: You can use the Contact Type and Skill drop-down lists either separately or together. When used together, the search engine looks for contacts that are part of the Contact Type group AND have the selected skill. Select the Contact Type and Skill you want, and then click the Find button.*

4. Select the name of the user you want to add to the Issue Work Group. Click the **Add** button.

The contact is listed in the right-hand box.   You can repeat this and the above steps as many times as you need to add other users to the work group.

5. To delete a contact from the Issue Work Group, select the name from the right- hand list box. Click the **Delete** button.   This only deletes the user from the work group, not from the Address Book.

6. You can assign specific tasks to individual Work Group members.   Select a Work Group member from the right-hand list.   Then select a task from the Task Assignment drop-down box, or click the small box next to Task Assignment to select from Lookup Tables.   You can select a different task for each Work Group member.   Click the **Update** button to save your changes.

7. Use the messaging system to send a note along with the issue to work group members .   Click the **Exit** button to close the dialog box and send the issue and any attached message to work group members.

Communicating with Work Group Members

When you send an issue to work group members, you want to include some message that tells them what you would like them to do.   Work group members then need some way of communicating their ideas or actions back to you.   The SDS HelpDesk messaging system lets you use Issue Notes as a forum for discussion among work group members.   The Issue Notes screen also logs all work group communications.

There are two ways to add and send messages to work group members.   You can send the issue and the attached message at the same time (this is usually done when the issue is first sent to work group members for review), or you can view the Issue Notes log and add a new message to it.

Send the Issue and the Attached Message at the Same Time

View the Work Group Notes Log and Add a New Message To It

Send the Issue and the Attached Message at the Same Time

1. Select the organization name from the Organization drop-down list, or click the small button next to Organization to select from Lookup Tables.

2. SDS HelpDesk conducts a search for all associated issues.   It then displays a list of issues in a pop-up screen.   Single-click any issue in the list for a quick view of key information.   When you find the issue you want to add one or more conditions to, click the **Sel** button on the quick view screen.   This loads the selected issue into the Issue Manager screen.   If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen.   Select another issue from the list.

3. Click the **Group** button to open the Issue Work Group dialog box. If you have not set up your issue work group, you need to do it now (see Issue Work Groups) .

4. Click the **Notes** button to open the Issue Notes dialog box.   This box displays any previous notes that have been sent between work group members.

5. Click the **Add** button to open the Add Note to Issue dialog box.
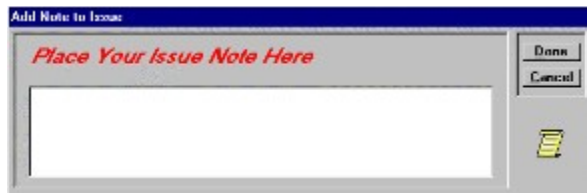
> *NOTE: You must use the Add Note to Issue dialog box to add information manually.   This allows the program to date, time stamp, and record who created the entry.*

6. Type your message in the box.   **Be sure to check your message before exiting.   Once you exit, you cannot edit the message.**

7. Click the **Done** button.   Your message is logged into Issue Notes, and it and the issue are sent immediately to the work group members.   Members are alerted that an issue has been sent to them.

8. Click the **Print** button to get a printout of the Issue Notes log.   Click the Notes **Exit** button, and then click the Work Group **Exit** button.   This returns you to the current issue.

View the Work Group Notes Log and Add a New Message To It

Once an issue is sent to work group members, the members need to communicate with each other about how to resolve it.   The messaging system can be used as a forum for discussion, as well as a log of all communications sent between work group members.

1. Select the organization name from the Organization drop-down list, or click the small button next to Organization to select from Lookup Tables.

2. SDS HelpDesk conducts a search for all associated issues.   It then displays a list of issues in a pop-up screen.   Single-click any issue in the list for a quick view of key information.   When you find the issue you want to add one or more conditions to, click the **Sel** button on the quick view screen. This loads the selected issue into the Issue Manager screen.   If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen.   Select another issue from the list.

3. Click the **Notes** button to open the Work Group Notes dialog box.   The Notes screen displays a log of all work group communications.


4. Click the **Add** button to open the Add Note to Issue dialog box.

    NOTE: You must use the Add Note to Issue dialog box to add information manually.   This allows the program to date, time stamp, and record who created the entry.

5. Type your message in the box.   **Be sure to check your message before exiting.   Once you exit, you cannot edit the message.**

6. Click the **Done** button.   Your message is logged into Issue Notes and sent immediately to work group members.   Members are alerted that they have a new message.   Click the **Print** button for a printout of the Issue Notes log.

7. Click the Issue Notes **Exit** button.

View Issues and Messages Sent to you by Work Group Members

When an issue or message is sent to you, you need to know right away so that you can take whatever action is necessary.   SDS HelpDesk uses an unobtrusive, yet continually visible, messaging system that alerts you immediately when an issue or message is sent to you.
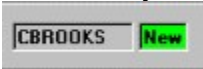
This portion of the messaging system is located in the upper right corner of the main SDS HelpDesk window.   It is recreated here for your reference.

Check the My Issues module whenever the New box is green.   My Issues

Use the Search Engine to Find an Issue

SDS HelpDesk has a powerful search engine that can quickly scan the database.   Search criteria can be as broad or narrow as desired.   Just about any criteria can be used to find information.

The Search Engine supports "wildcards" so that it is possible to enter just a few letters of a criterion in order to find possible matches.   A question mark (?) stands for any single character and an asterisk (*) stands for a number of characters.   Wildcards can be placed before, after, or in the middle of other characters.

In the following examples a single criterion at a time is used for searching.   Please keep in mind that you may narrow the amount of search results by using multiple search criteria at the same time.

After several issues are entered and resolved you will have a database that can be used by other support professionals to find answers to similar problems.   The Search Engine provides many useful techniques for finding previous issues that may be useful in resolving a current problem.

Search by Issue Number

Search for Issues by Organization

Search by Category

Search by Location

Search by Condition

Search by User

Search by Status

Search by Priority

Use the Issue Manager Search Screen

Search by Issue Number

Search by Issue Number

1. Click the **Clear** button to give you a blank Issue Manager screen.

2. Enter a number in the Number data entry box.

3. Click the **Find** button.

Search for Issues by Organization

Search by Organization

When a customer calls it is easy to find their issues by just doing a search on their company name.

1. Click the **Clear** button to give you a blank Issue Manager screen.

2. Select the organization name from the Organization drop-down list, or click the small button next to Organization to select from Lookup Tables, or enter all or a portion of the organization name in the Organization data entry box.   Use an asterisk before or after the name to represent the portion you didn't include (e.g., *West, Scott*, soft*)..

3. Click the **Find** button.   SDS HelpDesk conducts a search and then displays a list of issues in a pop-up screen.   Single-click any issue in the list for a quick view of key information.   When you find the issue you want, click the **Sel** button on the quick view screen.   This loads the selected issue into the Issue Manager screen.   If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen.   Select another issue from the list.

Search by Organization Using the Drop-Down List

1. Click the **Clear** button to give you a blank Issue Manager screen.

2. Click the **Organization drop-down arrow** to see a list of organizations.   Select the organization you want.

3. The first contact at the selected organization is displayed.   You can search on that contact, select a different contact by selecting the name from the Contact drop down list, or search only on the company.   To search on the company, select the contact, and then press the delete key.

4. Click the **Find** button.   SDS HelpDesk conducts a search and then displays a list of issues in a pop-up screen.   Single-click any issue in the list for a quick view of key information.   When you find the issue you want, click the **Sel** button on the quick view screen.   This loads the selected issue into the Issue Manager screen.   If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen.   Select another issue from the list.

Search by Organization Using Lookup Tables

1. Click the **Clear** button to give you a blank Issue Manager screen.

2. **Click** the small button next to Organization.   A Lookup Table of Organizations will appear. **Double-click** the organization you want.   The Lookup Table will close.

3. The first contact at the selected organization is displayed.   You can search on that contact, select a different contact by selecting the name from the Contact drop down list, or search only on the company.   To search on the company, select the contact, and then press the delete key.

4. Click the **Find** button.   SDS HelpDesk conducts a search and then displays a list of issues in a pop-up screen.   Single-click any issue in the list for a quick view of key information.   When you find the issue you want, click the **Sel** button on the quick view screen.   This loads the selected issue into the Issue Manager screen.   If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen.   Select another issue from the list.

Search by Category

Search by Category Using the Drop-Down Tree

1. Click the **Clear** button to give you a blank Issue Manager screen.

2. Click the large button that is next to the Category box to display the drop-down tree.   A plus (+) next to a category means that it has one or more subcategories.   Click the plus (+) to see the subcategory level.   Double-click an appropriate category or subcategory.   If you double-click on a subcategory, it and the category it is associate with are entered for you automatically.

3. Click the **Find** button.   SDS HelpDesk conducts a search and then displays a list of issues in a pop-up screen.   Single-click any issue in the list for a quick view of key information.   When you find the issue you want, click the **Sel** button on the quick view screen.   This loads the selected issue into the Issue Manager screen.   If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen.   Select another issue from the list

Search by Category Using Lookup Tables

1. Click the **Clear** button to give you a blank Issue Manager screen.

2. **Click** the small button next to Category.   A Lookup Table of Categories will appear.   A plus (+) next to a category means that it has one or more subcategories.   Click the plus (+) to see the subcategory level.   **Double-click** the category or subcategory you want.   The Lookup Table will close.

3. Click the **Find** button.   SDS HelpDesk conducts a search and then displays a list of issues in a pop-up screen.   Single-click any issue in the list for a quick view of key information.   When you find the issue you want, click the **Sel** button on the quick view screen.   This loads the selected issue into the Issue Manager screen.   If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen.   Select another issue from the list.

Search by Location

Search by Location Using the Drop-Down Trees

1. Click the **Clear** button to give you a blank Issue Manager screen.

2. Click the large button that is next to the Location box to display the drop-down tree.   A plus (+) next to a location means that it has one or more levels.   Click the plus (+) to see the next level. Double-click an appropriate location.   If you double-click on another level, it and the location it is associated with are entered for you automatically.

3. Click the **Find** button.   SDS HelpDesk conducts a search and then displays a list of issues in a pop-up screen.   Single-click any issue in the list for a quick view of key information.   When you find the issue you want, click the **Sel** button on the quick view screen.   This loads the selected issue into the Issue Manager screen.   If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen.   Select another issue from the list.

Search by Location Using Lookup Tables

1. Click the **Clear** button to give you a blank Issue Manager screen.

2. **Click** the small button next to Location.   A Lookup Table of Locations will appear.   A plus (+) next to a Location means that it has one or more levels.   Click the plus (+) to see the next level. **Double-click** the level you want.   The Lookup Table will close.

3. Click the **Find** button.   SDS HelpDesk conducts a search and then displays a list of issues in a pop-up screen.   Single-click any issue in the list for a quick view of key information.   When you find the issue you want, click the **Sel** button on the quick view screen.   This loads the selected issue into the Issue Manager screen.   If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen.   Select another issue from the list.

Search by Condition

Search by Condition Using the Drop-Down Tree

1. Click the **Clear** button to give you a blank Issue Manager screen.

2. Click the large button that is next to the Condition box to display the drop-down tree.   A plus (+) next to a condition means that it has one or more values.   Click the plus (+) to see the values.   Double-click an appropriate value.   It and the condition it is associated with are entered for you automatically.

3. Click the **Find** button.   SDS HelpDesk conducts a search and then displays a list of issues in a pop-up screen.   Single-click any issue in the list for a quick view of key information.   When you find the issue you want, click the **Sel** button on the quick view screen.   This loads the selected issue into the Issue Manager screen.   If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen.   Select another issue from the list.

Search by Condition Using Lookup Tables

1. Click the **Clear** button to give you a blank Issue Manager screen.

2. **Click** the small button next to Condition.   A Lookup Table of Conditions will appear.   A plus (+) next to a Condition means that it has one or more values.   Click the plus (+) to see the values.   **Double-click** the value you want.   The Lookup Table will close.   You can search on one or more conditions depending on how narrow or wide a search you want to conduct.

4. Click the **Find** button.   SDS HelpDesk conducts a search and then displays a list of issues in a pop-up screen.   **Single-click** any issue in the list for a quick view of key information.   When you find the issue you want, click the **Sel** button on the quick view screen.   This loads the selected issue into the Issue Manager screen.   If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen.   Select another issue from the list.

Search by User

Search by User Using the Drop-Down List

1. Click the **Clear** button to give you a blank Issue Manager screen.

2. Click the **User drop-down arrow** to see a selection list.   Select the User you want.   The selection list will close.

3. Click the **Find** button.   SDS HelpDesk conducts a search and then displays a list of issues in a pop-up screen.   **Single-click** any issue in the list for a quick view of key information.   When you find the issue you want, click the **Sel** button on the quick view screen.   This loads the selected issue into the Issue Manager screen.   If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen.   Select another issue from the list.

Search by Status

Search by Status Using the Drop-Down List

1. Click the **Clear** button to give you a blank Issue Manager screen.

2. Click the **Status drop-down arrow** to see a selection list.   Select the status you want.   The selection list will close.

3. Click the **Find** button.   SDS HelpDesk conducts a search and then displays a list of issues in a pop-up screen.   **Single-click** any issue in the list for a quick view of key information.   When you find the issue you want, click the **Sel** button on the quick view screen.   This loads the selected issue into the Issue Manager screen.   If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen.   Select another issue from the list.

Search by Status Using Lookup Tables

1. Click the **Clear** button to give you a blank Issue Manager screen.

2. **Click** the small button next to Status.   A Lookup Table will appear.   **Double-click** the status you want.   The Lookup Table will close.

3. Click the **Find** button.   SDS HelpDesk conducts a search and then displays a list of issues in a pop-up screen.   **Single-click** any issue in the list for a quick view of key information.   When you find the issue you want, click the **Sel** button on the quick view screen.   This loads the selected issue into the Issue Manager screen.   If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen.   Select another issue from the list.

Search by Priority

Search by Priority Using the Drop-Down List

1. Click the **Clear** button to give you a blank Issue Manager screen.

2. Click the **Priority drop-down arrow** to see a selection list.   Select the priority you want.   The selection list will close.

3. Click the **Find** button.   SDS HelpDesk conducts a search and then displays a list of issues in a pop-up screen.   **Single-click** any issue in the list for a quick view of key information.   When you find the issue you want, click the **Sel** button on the quick view screen.   This loads the selected issue into the Issue Manager screen.   If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen.   Select another issue from the list.

Search by Priority Using Lookup Tables

1. Click the **Clear** button to give you a blank Issue Manager screen.

2. **Click** the small button next to Priority.   A Lookup Table will appear.   **Double-click** the Priority you want.   The Lookup Table will close.

3. Click the **Find** button.   SDS HelpDesk conducts a search and then displays a list of issues in a pop-up screen.   **Single-click** any issue in the list for a quick view of key information.   When you find the issue you want, click the **Sel** button on the quick view screen.   This loads the selected issue into the Issue Manager screen.   If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen.   Select another issue from the list.

Start Issue Timer

You can track the time that it takes to resolve an issue.

1. Click the **Clear** button to give you a blank Issue Manager screen.

2. Select the organization name from the Organization drop-down list, or click the small button next to Organization to select from Lookup Tables.

3. Click the **Find** button.   SDS HelpDesk conducts a search and then displays a list of issues in a pop-up screen.   **Single-click** any issue in the list for a quick view of key information.   When you find the issue you want, click the **Sel** button on the quick view screen.   This loads the selected issue into the Issue Manager screen.   If you find that this is not the issue you want, click the **View List** button in the upper right portion of the Issue Manager screen.   Select another issue from the list.

4. Click the **Start Timer** button that is located in the bottom right portion of the module.   To stop the timer, click the button again (it now says **Stop Timer**).   Once stopped, the Time Sheet Entry dialog box opens.   It displays the start and stop times and the actual time spent on the issue.   If you bill your customers for the time spent resolving an issue, select the "**Yes**" radio button.   Select the "No" radio button if you do not bill based on time.   You can modify the time displayed in the Charge Following Time box since some companies charge only for full hours while others may round the time to the nearest quarter hours, etc.   Click the Task down arrow to charge time to a particular task.   Click the **Make Time Entry** button to record the time to resolve the issue.

Print Issue SnapShot Report

You may want to print out information for a particular issue.   You can do this directly from Issue Manager.
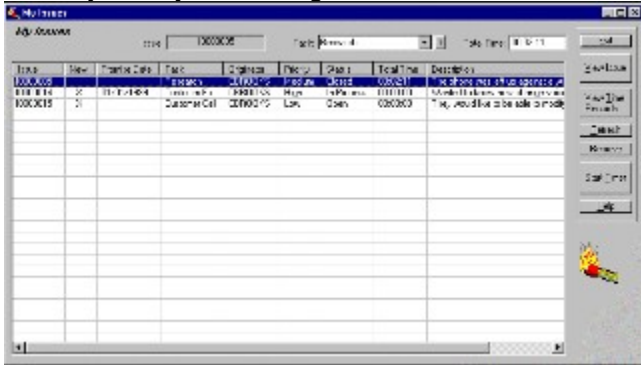
1. Select the issue.

2. Click the **Preview** button to see the report before it is printed.

3. Click the **Print** button to get a SnapShot Report for this issue.

My Issues

When a new issue or message is sent to you for review, research, input, etc., the button next to your user name turns green and displays "New."
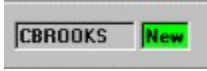
Click the **My Issues** icon in the toolbar to see a list of new issues that have been sent to you, issues you may be working on, or to initiate time tracking on a particular issue task.

1. Select any of the issues in your list.

2. Click the **View Issue** button to launch the Issue Manager module and view the details of the issue.

3. When you exit Issue Manager, you can click the **Start Timer** button to track the time it takes you to complete the initial task that has been assigned to you.   Click the button again (it now says **Stop Timer**) when you are finished with the task or when you need to work on another task or project. The timer will keep track of the total time you spend on the issue.

4. You may find that other tasks are needed before the issue is resolved.   Select the issue that you want to track task time for.   Select another task from the Task drop-down list, or click the small button next to Task to select from Lookup Tables.

5. Click the **Start Timer** button.   When you click the button again (it now says **Stop Timer**) the issue task changes to the one you are currently working on and the time spent thus far is displayed in the Total Time column.

6. Click the **View Time Records** button to open the Time Tracker module.   The various tasks and associated time values are listed in the Time Entries portion of the screen.   If necessary, you can select a specific task and then modify the actual hours-spent working on it.   When you exit Time Tracker, you can click the **Refresh** button in My Issues to see the latest total time value.

7. When you are finish with an issue, click the **Remove** button.   This only removes the issue from you're my Issue screen, not from Issue Manager.
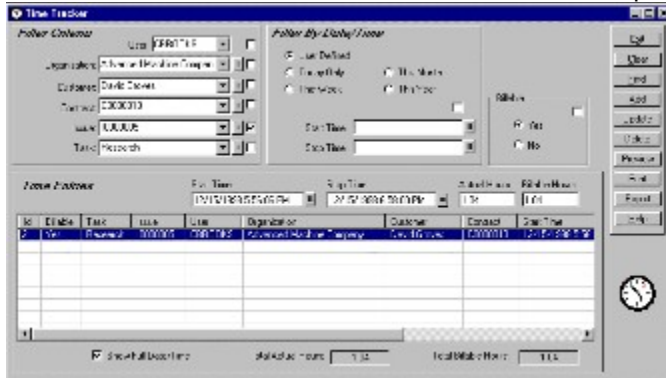
Click here for more information on Time Tracker   Time Tracker

Time Tracker

You can get to Time Tracker in two ways.   One is by clicking on the Time Tracker icon.   The other is by clicking the **View Time Records** button in the My Issues module.   Time Tracker is used to track the amount of time you spend resolving an issue.   It not only displays the total time, but it also displays the time you spend on each task associated with the issue.   You can search using just about any field, and you can also track billable hours.

> *NOTE: If you open Time Tracker by clicking on the My Issues, View Time Records button, the issue and its associated times are preloaded for you.   Click the individual task records to see the actual hours spent.   The Total time spent on the issue is displayed in the Total Actual Hours box.*

Click the Time Tracker icon in the toolbar to open the module.

1. Set your search criteria.   For example, if you want to see a list of all issues and tasks that have been assigned to you, select your User Name from the User drop down list.   Then click the small box next to User to set this as your search criterion.

2. Click the **Find** button.   You will see a list of issues and your tasks displayed in the Time Entries grid. Another example is to also select an organization from the Organization drop-down list, or click the small button next to Organization to select from Lookup Tables.   Click the small box next to Organization to set it as another search criterion.   Click the **Find** button. You will see a list of issues and your tasks (if there are any) for the organization you selected.

    > *NOTE: You can use any field(s) that has a small box next to it as a search criterion.   Just be sure to click the small box to indicate that you want to use it as part of your search criteria.   Also remember that the more items you select, the narrower your search results.*

    > *You can also conduct a broad search and then filter the results.   For example, select your User Name from the User drop-down list.   Click the small box and then click the Find button.   Select an issue from the Time Entries grid and then click the small box next to Issue.   Click the Find button again.   The Time Entries grid now only displays the tasks for that issue*

3. Select one of the issue tasks in the Time Entries grid.   The Start and Stop times are displayed as well as the actual hours and any billable hours.   If needed, you can modify the Actual and Billable hours.   Some companies may round actual hours to the nearest quarter hour.   Other companies may only bill for full hour increments.   After you have made any necessary changes, click the **Update** button.

4. You can add additional tasks from the Time Tracker screen.   Select the issue you want to add a task to.   Select a new task from the Task drop-down list.   Click the **Add** button.   You can enter your Actual Hours and/or Billable Hours directly into the boxes.

5. Click the Preview button to see a SnapShot report of issues and tasks.   To filter the report, click one

or more of the small check boxes.   When previewed, the report shows the filters you selected.

Scheduler Overview

There are going to be times when you will not be able to resolve an issue immediately.   You may have to investigate the problem, consult another expert, or even set an appointment with an outside contractor.   In each of these cases, you need to get back to your customer so he/she will know what the status of the issue is, and what is being done to resolve it.

The built-in Scheduler can be used to post reminders for an organization or an individual.   Use the calendar to set the follow-up date and time. Then, add notes so you know exactly what each call or follow-up item is about.   The Scheduler keeps track of all of your follow-up items until they are complete.

Click the Scheduler icon in the toolbar to open the module.
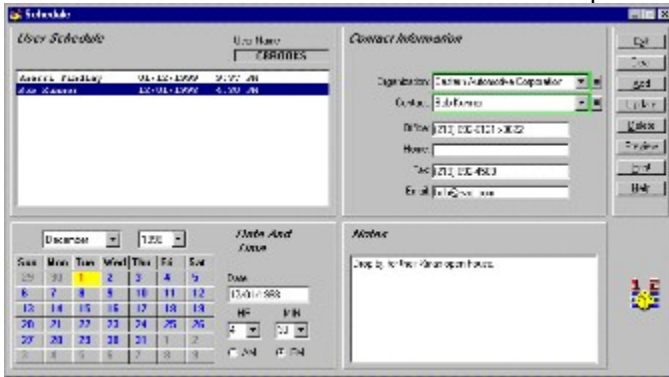
The green boxes around the Organization and Contact fields indicate that these are mandatory fields and must be filled in for each follow-up item.   You can add a generic organization such as "individual" or "none" if the contact is not associated with an organization.

Steps to . . .

[Add a New Follow-up Item](#)

[Modify a Follow-up Item](#)

[Delete a Completed Follow-up Item](#)

[Print SnapShot Report](#)

Add a New Follow-up Item

1. Select the organization name from the Organization drop down list, or click the label to select from the PickList.   SDS HelpDesk automatically searches for the contacts at that organization and displays the first one.   If you need a different contact, select the name from the Contact drop down list.

2. Use the calendar section of Scheduler to set the follow-up date and time.   When you open Scheduler, the current date is highlighted in the calendar.

   If needed, select the follow-up month and year from the appropriate drop down lists.   Then click a date button to select the day the follow-up should occur.

3. Select the follow-up hour and minute times from the appropriate drop down lists.   Then select either the AM or PM radio button.

4. Use the Notes field to enter any information you need for this follow-up item.   It can be a reminder of what the follow-up call is about, the times a contractor is available, a note that a service contract has expired and needs to be renewed, etc.

5. When finished, click the **Add** button.   The contact, date, and time of the follow-up item are displayed in the large list box in the upper left corner of the Scheduler screen.   Click on any of the follow-up items to see its attached notes.

6. To enter another new follow-up item, click the **Clear** button to give you a blank screen.

   NOTE: Whenever you start Scheduler, your list of follow-up items is displayed in the upper left-hand box.

Modify a Follow-up Item

1. Select the follow-up item you want to modify from the large list box in the upper left corner of the Scheduler screen.

2. Modify the follow-up information.

3. When finished, click the **Update** button to save your changes.

Delete a Completed Follow-up Item

1. Select the follow-up item you want to delete from the large list box in the upper left corner of the Scheduler screen.

2. Click the **Delete** button.

Print Scheduler SnapShot Report

You may want to print out a list of your follow-up items.   You can do this directly from the Scheduler module.   The SnapShot report displays follow-up items by date.

1.   Click the **Preview** button to see the report before it is printed.

2.   Click the **Print** button to get a SnapShot Report for your follow-up items.

Knowledge Base Module

The SDS HelpDesk Knowledge Base is used to store and retrieve answers to repeat questions.   It can be used to maintain step-by-step instructions, scripts, system configuration information, part numbers, lists of tools and materials to do a job, and just about anything else desired.

You can pre-load the knowledge base with information, or build it up over time as issues are entered and resolved.   Then use the search engine to quickly scan the knowledge base for the solution or information you need.

Click the Knowledge Base icon in the toolbar to open the module.
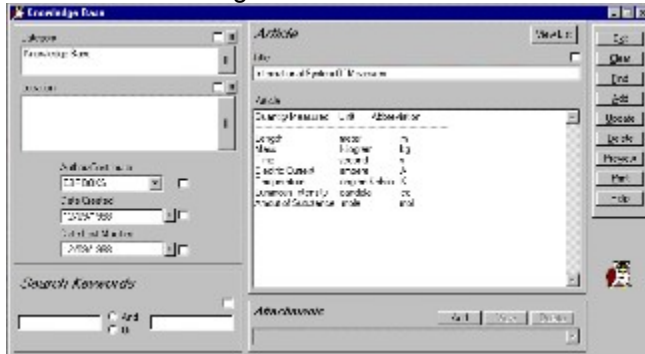
Click the **Find** button to see a pop-up list of Knowledge Base titles.   Double-click one of the titles to view its contents.

Steps to . . .

[Add Knowledge Base Article](#)

[Search the Knowledge Base](#)

[Preview and Print a Knowledge Base Article](#)

Add Knowledge Base Article

1. You can add as much or as little information as need to add a Knowledge Base article.   However, it is recommended that at a minimum, you enter some kind of title so that you will know what the article is about, as well as a category.   This makes searching for the article much easier.

2. Enter a short descriptive title into the Title edit box.

3. Click the **large button** next to the Category box to open the drop-down tree.   A plus next to a category means that there is one or more subcategory.   Click the **plus** to see the subcategories. **Double-click** a subcategory and it and the category it is associated with are entered for you automatically.

4. If appropriate, click the **large button** next to the Location box to open the drop-down tree.   A plus next to a location means that there is another level below it.   Click the **plus** to see the next level. **Double-click** a level and it and all higher levels that it is associated with are entered for you automatically.

5. Select the author/contributor's user name from the drop-down box.

6. Enter the current date or the date created into the Date Created box, or click the small button to open the calendar.

7. Type the information you want into the Article box and then click the **Add** button.   If you prefer, you can attach an existing article.   Once you enter the Title, click the **Add** button.   Then click the **Attachments Add** button to launch the Open screen.   Select the article you want to add and then click the **Open** button.   Click the **Update** button to save the attachment.

You can also add Issues to the Knowledge Base from the Issue Manager module.

Add an Issue to the Knowledge Base

Search the Knowledge Base

You can search the Knowledge Base by category, location, author, dates, keywords, or title.

1. If you want to use category as one of your search criteria, click the **large button** next to the Category box to open the drop-down tree.   A plus next to a category means that there is one or more subcategory.   Click the **plus** to see the subcategories.   **Double-click** a subcategory and it and the category it is associated with are entered for you automatically.   Click the check box in the upper right-hand corner.   This sets category as a search criterion.

2. If you want to use location as one of your search criteria, click the **large button** next to the Location box to open the drop-down tree.   A plus next to a location means that there is another level below it. Click the **plus** to see the next level.   **Double-click** a level and it and all higher levels that it is associated with are entered for you automatically.   Click the check box in the upper right-hand corner.

3. You can click any of the other check boxes that you want to use as part of your search criteria.

4. If you want to use keywords, enter a word in the first keywords box.   You can enter another word in the second box.   If you select the "And" radio button, the search engine will look for knowledge base articles that contain both words.   If you select the "Or" radio both, the search engine will look for articles that contain one or the other word.

    NOTE: Your search can be as broad or as narrow as you wish.   The more check boxes you click, the narrower your search.

5. Click the **Find** button to see a pop-up list of Knowledge Base titles.   Double-click one of the titles to view its contents.

Preview and Print a Knowledge Base Article

1. Click the **Find** button to see a pop-up list of Knowledge Base titles.   Double-click one of the titles to view its contents.

2. Click the **Preview** button to see a SnapShot report of the article.   Click the **Printer** icon at the top of the Preview screen to get a hard copy of the report.

Report Manager Overview

Two kinds of reports are available in SDS HelpDesk depending on your needs.   Use SnapShot reports when you want to see information for a currently selected record, or when you want a printout of items in a Lookup Table.   SnapShot reports can be previewed and printed directly from the module you are working in.

Use Executive Reports when you need to print out details for groups of records.   There are nine standard executive reports that are preloaded with SDS HelpDesk.   You can change the name of any report to make it more meaningful to you.   If you have Seagate Crystal Reports, Version 6.0, you can even add your own reports.

Click the Reports icon   in the toolbar to open the module.

■   **Steps to . . .**

[Add a New ExecReport](#)

[Modify an ExecReport Name](#)

[Delete an ExecReport](#)

[Preview and Print an ExecReport](#)

Add a New ExecReport

SDS HelpDesk SnapShot Reports and Executive Reports are located in the Reports folder.   If you have Seagate Crystal Reports, Version 6.0, you can design and add your own executive reports.

> *NOTE: If you design your own reports, be sure to put them in the Reports folder under HelpDesk. The file name extension should be *.rpt.*

Once your new report file has been put in the Reports folder, you can add it to the list of available executive reports.

1. Click the **Add** button to launch the Open dialog box.

2. Use the Look in drop down list to locate the Reports folder.   The default path is C:\Program Files\ Scott Data systems\HelpDesk\Reports.   Double-click the Reports folder to open it.

3. Select the new report you want to add to the Available Reports list.   Click the **Open** button.

4. Type a descriptive report name in the Report Description dialog box.   Click the **OK** button.   The report is added to the Available Reports list box.

> *NOTE: SnapShot reports should not be added to the Available Reports list.   If you do so, you may get an error message when you preview the report.*

Modify an ExecReport Name

1. Select the report from the Available Reports list.

2. Make your changes to the report name that is displayed in the Report edit box.

3. Click the **Update** button to save your changes.

Delete an ExecReport

1. Select the report from the Available Reports list.

2. Click the **Delete** button.   This just deletes the report from the Available Reports list.   It does not delete it from the Reports folder.

Preview and Print an ExecReport

1. Select the report from the Available Reports list.

2. Click the **Preview** button to view the report on your screen.   Click the **Printer** icon at the top of the Preview screen to get a hard copy of the report.

3. To print a report without previewing it first, click the **Print** button.

    NOTE: Use the Setup button to select the print range and the number of copies you want.

Glossary of SDS HelpDesk Terms

{button A,JI(`HelpDesk.HLP',`Glossary_A')}{button B,JI(`HelpDesk.HLP',`Glossary_B')}{button C,JI(`HelpDesk.HLP',`Glossary_C')}{button D,JI(`HelpDesk.HLP',`Glossary_D')}{button E,JI(`HelpDesk.HLP',`Glossary_E')}{button F,JI(`HelpDesk.HLP',`Glossary_F')}{button G,JI(`HelpDesk.HLP',`Glossary_G')}{button H,JI(`HelpDesk.HLP',`Glossary_H')}{button I,JI(`HelpDesk.HLP',`Glossary_I')}{button J,JI(`HelpDesk.HLP',`Glossary_J')}{button K,JI(`HelpDesk.HLP',`Glossary_K')}{button L,JI(`HelpDesk.HLP',`Glossary_L')}{button M,JI(`HelpDesk.HLP',`Glossary_M')}{button N,JI(`HelpDesk.HLP',`Glossary_N')}{button O,JI(`HelpDesk.HLP',`Glossary_O')}

{button P,JI(`HelpDesk.HLP',`Glossary_P')}{button Q,JI(`HelpDesk.HLP',`Glossary_Q')}{button R,JI(`HelpDesk.HLP',`Glossary_R')}{button S,JI(`HelpDesk.HLP',`Glossary_S')}{button T,JI(`HelpDesk.HLP',`Glossary_T')}{button U,JI(`HelpDesk.HLP',`Glossary_U')}{button V,JI(`HelpDesk.HLP',`Glossary_V')}{button W,JI(`HelpDesk.HLP',`Glossary_W')}{button X,JI(`HelpDesk.HLP',`Glossary_X')}{button Y,JI(`HelpDesk.HLP',`Glossary_Y')}{button Z,JI(`HelpDesk.HLP',`Glossary_Z')}

A

Add Button
Attachments *(Issue Manager)*)

B

Back Button *(Issue Manager)*

C

Calendar *(Scheduler)*
Cancel By (Service Contracts)
Category *(Issue Manager)*
Clear Button
Condition *(Issue Manager)*
Contact Name
Contact Type
Contract (Service Contracts)
Contracts Box (Issue Manager)
Customer

D

Date Opened *(Issue Manager)*
Delete Button
Dialog Box
Drop Down List
Duration (Service Contracts)

E

End Date (Service Contracts)
ExecReport
Export

X

Y

Z

Add Button

When clicked, adds a new record to the database.

Attachments

Any support files such as word processing documents, spreadsheets, CAD drawings, or faxes.   These files provide more detail for an issue and can be viewed directly from the Issue Manager module.

Back Button

Lets you scroll backwards through the list of issues.

Calendar

Used to set the date and time for a follow-up item.

Cancel By

The name of the person who notifies you to cancel a service contract.

Category

A grouping of similar items.   Most issues can be grouped into general categories, such as product defect, how-to questions, broken equipment, warranty work, etc.

Clear Button

Used to clear all information from the module window and give you a blank screen.

Condition

A circumstance that can have an effect or influence on an issue.   **Example**:   The operating system, memory, network, and printer are all conditions of a computer.

Contact Name

Any person you may work with such as internal employees, customers, prospects, contractors, tenants, vendors, etc.   Contacts can be individuals or members of an organization.

Contact Type

Used to group your contacts into categories depending on your relationship with them (e.g., internal employees, customers, contractors, tenants, vendors, individuals).

Contracts Box

This box is green when a service contract is valid. It is red when there is no service contract or the contract has expired.

Customer

A customer is a category of contact.   A customer is any contact who notifies you of an issue, and then expects assistance from you to resolve it.

Date Opened

The date and time an issue is first entered into the system.   The program automatically enters this information for you.

Delete Button

Click this button to remove a record from the database.   Once a record is deleted, it cannot be put back without reentering the information.

Dialog Box

A window that appears temporarily.   Some dialog boxes are launched from within a module, others automatically open when you take certain actions.

Drop Down List

Can be used to select previously entered information.

Duration

The time period a service contract is valid (e.g., annual, quarterly, 13 months, 120 days).   When you add a time period, you will be asked to enter the number of days that period covers.

End Date

The month, day, and year a service contract ends.   The program calculates and enters this date for you.   It is based on the service contract duration.

ExecReport

Used when you want a printout of summary information for a group of records.   For example, the contacts at a certain company, or the issues that are still open for a certain contact.

Export

To move the database information, in text format, to another database or application.

Find Button

Once you set your search criteria, this button is used to launch the search engine.   The search engine then scans the database to find the records that meet the criteria you set.

Contact

A contact's complete name.   The format used is first name, middle initial, last name.   The middle initial is optional.   Example: John Jones or John E. Jones.

History Button

Used to open the Issue History log.   The log records key issue events.

Issue

The reason a customer contacts you for support.   An issue can be a problem, a how-to question, a broken piece of equipment, a feature request, a suggestion, a program bug, etc.

Issue History Log

A record of key issue events.   The program automatically logs when an issue is opened, who enters it, status changes, escalations, and priority changes.   Users can also add comments manually to the log.

Issue Location Labels

The location table is used to indicate where an issue has occurred.   Your system administrator can define up to four hierarchical location levels.   The labels that tell you what these levels represent can be customized for your company's situation.   These labels are displayed in the Issue Manager module.

Issue Notes

Used to send and log messages to issue work group members.

Issue Title

Where the Issue code/number is displayed.

Issue Work Group

A group of internal and/or external people who work together and have the expertise needed to resolve an issue.

Knowledge Base

Provides solutions to repeat issues.   It can be used for step-by-step instructions, how-to information, scripts, parts lists, tools or materials needed to do a job, etc.

Level

The various types of support service levels you offer (e.g., unlimited, on-site, warranty, per-incident).

Limit

The total number of per-incident issues that are covered by a service contract.

Lookup Tables

Used to create, maintain, and standardize commonly used information.   The information entered in Lookup Tables is displayed in drop down lists and PickLists in other modules.   Lookup Tables help you save time, avoid typing errors, and ensure high quality data entry.

Merge Duplicates

Lets you combine information for similar items into one record.

Messaging System

Enables work group members to send issues and notes to each other.   It notifies work group members that an issue has been sent to them, and acts as a forum for discussion.

Minus Button

Used to delete information in a subsection of a module screen.

Module

An area in SDS HelpDesk where related tasks or functions are performed.

Next Button

Lets you scroll forward through the list of issues.

Notes

Notes boxes are used to attach comments or notes to the selected record.   Notes can contain a maximum of 256 characters.

Notes Button

Used when you want to send a message or note to other issue work group members.   This is similar to the Send button, but it takes you directly to the Issue Memorandum.

Identifier (in Address Book)

Some contacts, such as internal employees, may have an ID number.   If so, that unique number goes in this box.

Contract (in Service Contracts)

This is a unique contract number that is issued whenever a new service contract is added.   The system administrator can set the format   of the contract number to include fixed text, the date, your company name, and an incrementing number.

On-the-fly

You can start using the program, then add new information as you need it directly from the screen where you are working.

Password

An encrypted code that authorized users enter to logon to SDS HelpDesk.

Plus Button

Used to add information in a subsection of a module screen.

Print Button (Except in Report Manager)

Used to print a SnapShot Report.   The SnapShot Report shows information for a currently selected record.

Print Button (in Report Manager)

Used to print an ExecReport from the Report Manager module.

Priority

Indicates how critical the resolution of an issue is.   Broken equipment, software installation problems, and emergency issues should have a higher priority.   The priority can be changed as needed.

Rate

A contractor's hourly rate.

Real Time

There is no delay between the time an action is taken and recorded by one user, and the time other users can see what has been entered into the system.

Record

Related pieces of information.   **For example**, a contact and his/her address, phone number, and issues.

Search Dates

Used to find issues that were opened on a specific date or were opened between a range of dates.

Search Engine

Scans the database for information you specify using search criteria.   Search criteria can be as broad or narrow as desired.   You can search by category, location, condition, status, priority, organization, keywords, or dates.

Search Keywords

Words or phrases that are used as search criteria.

Keywords

Words or phrases that are used as search criteria.

Send Button

Used when you want to send an issue to a work group member for review. Similar to the Notes button, except that it opens the Issue Work Group dialog box first.

Sender

The issue work group member who has sent an issue to you for review or action.

Service Contract

Service contracts are used to define the kind of technical support that is provided to customers. Contracts can cover different service levels and different time durations.

Skill

The expertise or knowledge that a contact has.   Skills are used in many of the modules to help you find just the right people to help you resolve an issue.

SnapShot Report

Used when you want a printout of screen information for a currently selected record.

Start Date

The month, day, and year a service contract begins.   The format used is mm/dd/yy.

Status

Indicates the progress towards resolution of an issue.   The status can be changed as the issue moves closer to resolution.

Subcategory

When an issue category can be broken down further. **Example**: The category, Broken Equipment, can be broken into multiple subcategories (e.g., copy machine, printer, garage door, engine).

System Administrator

The person in your organization who is responsible for initially setting up SDS HelpDesk, authorizing users, setting initial passwords, and other system items.   This should be someone who is familiar with the Windows 95 or Windows NT operating system.

Update Button

Used to save changes when you modify record information.

The number of new issues that a per-incident user has contacted you about.

User

The support professional who is entering an issue into the system.   In most cases, this will be you.

User Name

The name or initials used when a user logs on to SDS HelpDesk.   The user name must be unique.   It can be any combination of alpha numeric characters up to ten characters in length.

User Permissions

The system administrator can give certain authorized users special permissions.   Permissions include acting as another system administrator, accessing and modifying Lookup Tables, and being able to add, modify, or delete reports.

Valid Box

The box is green for current contracts.   It is red for expired, canceled, or non-existent service contracts.

Value

A subcategory of a condition (something that can have an effect or influence on an issue).   Example: A computer has a condition called "operating system."   That condition can have multiple values such as Windows 95, Windows NT 3.51, Windows NT 4.0, or OS/2.

View Button

The Attachment View button is used to look at an issue's supporting files.

Get Button

Used in both the Customize Issue Code and Customize Service Contract Code dialog boxes.   Click the Get button to see the current format, if there is one.   This is helpful if you want to use the format as a template.

PickList

Used to enter repetitive data (e.g., organizations, categories, subcategories, issue locations, priorities, statuses, contract limits and durations, conditions, skills, and contact types.   Just bring up the appropriate PickList, select the data you want, and it is entered automatically for you.   The information that is entered in Lookup Tables is displayed in PickLists.

Mandatory Field

A green box surrounds the field.   Information must be entered for mandatory fields.

Found Box

When the search engine finishes scanning the database, a number is displayed in this box.   The number indicates how many items match your search criteria.

Work Group

An Issue Work Group exists solely for the purpose of resolving a single issue.   Any SDS HelpDesk user can be added to a work group.