Operators Guide

Version 8.4

Latest features Summary (these are shown in red in this document):

- Provide option to search on login id of a user when logging new calls
- Operator drop down on New and update Call pages now lists all Team names first.
- Provide selection of Service type in Open Calls lists to view them separately
- Include the name of who last updated a call in the Open call lists
- Allow scripts to be displayed as a Form on Operators New call page
- Tasks may be configured to automatically change Operator/Team and Status
- Allow Operator/Team assigned to be changed when adding Events
- Improvements to time recording including updates on Changes and Problems
- Problem Management option to close related call when resolved.
- Change Management new features including:
  - New Change update page layout similar to Call updates
  - Change Type task lists with auto status reassignment
  - Change Type tasks may not all be required
  - 8 Additional configurable fields
  - Multiple approval emailing with tracking

Refer to the separate Administration Guide for Configuration of your helpdesk
Last updated October 2018 for version 8.4
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1 Introduction

The purpose of this document is to guide Support Operators to raise, view, amend and resolve Helpdesk Requests. It is a User Guide to ensure their timely and efficient resolution.

Some of the terminology of the document may vary from those that the administrator has set for your installation.

A copy of this document is available in MS Word® format from the sitehelpdesk.com community web site which may be modified for your specific terminology and working practices. You may then save it on the web server and redirect the Link for your own use.

1.1 Protocol

Be professional. Each action taken by you will be recorded in the Events log with your id and the date/time.

When updating your call tickets, always write concise and informative actions and resolutions. Include any specific error codes or key words relating to the issues being dealt with. Do not write brief non descriptive comments like ‘fixed’ or ‘sorted’ as this will not benefit any one trying to resolve similar issues in the future.

Also be aware that the end users may have access to review their call histories and by default will see the comments you enter.

1.2 Notes, Tips and Cautions

This guide will highlight important points;
  o Notes – Interesting information related to the surrounding discussion
  o Tips - Offers advice or teaches an easier way to do things
  o Cautions – Advises you about potential problems and helps you avoid them.

1.3 Changing the way you work

This helpdesk system will be used to record all support provided to staff. Every request should be logged. If the call logging facility has been provided to staff then try to encourage them to log their own calls so that you may avoid interruptions when on another call. The user call logging options may be made available from your corporate Intranet at HTTP://{your_server}/sitehelpdesk/user/log.asp

Some requests may have to be dealt with immediately and a call created afterwards. There are tools such a New Call from an existing call and using Call Templates which can speed this up.
2 Accessing the helpdesk

The helpdesk is available to operators from any PC on the network from their Web browser. By going the following URL (web site address)

http://[your_web_server]/sitehelpdesk (Substituting the name of the server where sitehelpdesk is installed)

Tip: you can save the URL to your desktop by dragging the IE Address bar icon to the PC’s desktop to launch it directly next time. Or add to your Favourites.

Using the Login ID and Password allocated to you, complete the necessary fields and click Login.

2.1 PDA / Smart phone Interface

Operators may also login using the PDA interface which not only supports ipad Blackberry and now supports other smart phone devices.

Click on the Mobile Login button which will take you to http://[your_web_server]/sitehelpdesk/pda/default.asp (Substituting the name of the server where sitehelpdesk-IT is installed).

From this interface you may add and manage support calls. Log new calls, change Call reassignments, status and priority, close calls and add Events. FAQ and Links are also available for lookup.

If hardware management is configured to "track the hardware against calls being logged" then you may also enquire and update inventory records via
the pda interface.

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<th><strong>Asset Management</strong></th>
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<td><strong>Search Assets</strong></td>
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<td><strong>Results can be sorted by clicking on a column header.</strong> If an exact match is not found you will be able to enter the new asset details and save.</td>
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<tr>
<td><strong>Asset details can be viewed by clicking on the Asset No.</strong> Once displayed the asset details can be validated and modified as required.</td>
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Any part of the Hostname, Serial No., or Asset No. can be entered or scanned in. Matching results will be displayed.

### 2.2 Sitehelpdesk Desktop Alerter

This is installed on your PC and checks for new calls and alerts you from the task bar when these have been assigned to you.

![Sitehelpdesk Alerter](image)

This may be downloaded from the customer support site, Software Upgrade menu. Refer to the separate Alerter installation guide.

### 2.3 Security Considerations

Always logout if you are leaving your computer unattended. Note that there is a session time out with a default of 60 minutes of inactivity, after which time the helpdesk browser will require you to login again.

If you are logging in remotely or from another person’s machine then do not select the browser option to remember the password. If you suspect your security id has been compromised then change your password from the tools menu.
3 Operators Home Page

When you have successfully logged on to the main application at http://[your_web_server]/sitehelpdesk (Substituting the name of the server or DNA where the helpdesk is installed) you will be on the Operator Home Page and you may return to this page at any time using the left hand menu.

The Operator home page shows your open calls by status and SLA Priority. A graphical display of your monthly volumes of calls opened, actioned and closed. There are also summaries of any calls assigned to you that have Due Dates and Call, Change or Inventory related Follow Ups outstanding or due in the next week that. You may flag these as complete from here.

If SLAmonitor and EMLmonitor are installed then the times of their last run are displayed along with a Green or Red flag or identify if it is running or has stopped. Notify Administrator if Red.

The ticker message keeps you informed of any global notifications, The ticker is also available from the top menu so it is always visible.

3.1 Navigating the Helpdesk

Navigation from the home page is simple. On the left you have your menu options, on the right a summary of all open call tickets allocated to you and any diarised Follow Ups for the next seven days. These are underlined indicating that it is a URL link and you may click on them to drill down and open related call tickets.
Think of it as a web site.
- Menu options may be expanded and selected
- Links to other web pages are always shown as underlined links
- Some pages will pop up. Depending on their function they may close automatically, have a close button or require that you click on the X on the top right hand corner of the new window.

There are other standard web browser features readily available to you.
- Use the right mouse key on a page to print the contents
- Highlight text and either drag and drop or copy and paste to other documents or other fields within the helpdesk.

Hint: Use the right mouse button on menu options to ‘open the page in a new widow’ – very useful on the New Call page if a new one must be entered while another is partially complete.

Top menu can be collapsed to provide more space for data entry and lists. It contains a quick search feature. This will take you directly to a ticket if you enter the number or you can search for text contained in calls and get a list to enquire upon.

There are also some quick select buttons for New Calls, My Open Call Lists and Call Searches. The My Open Calls count will update periodically to help indicate if you have new calls coming in. The ticker message is visible on the top menu frame from any page so updates are seen straight away.

3.2 Home Page Features

The moving ticker message is updated by the Administrator and shows any known support issues, scheduled maintenance etc. This is also viewed by staff if they have access to their pages.

3.3 Availability

Your current status or Availability and any related comments are displayed and you must check this each time you login. You are able to update these to indicate to those who assign requests the status of your availability to work on requests

Click on the note pad by your name (old style menu). You will get a pop up window as below. With the latest menu it is in the tools menu or link behind your status on the main welcome page.
You can add notes for your own use which are displayed on the home page.

Select from the status drop down the most appropriate current status. Note that this appears on drop down selections so keep it up to date.

You can also indicate how you wish to receive automated alerts from the Helpdesk Application each time a call ticket is assigned to you.

Your Administrator will advise whether email and /or SMS Text messaging are available.

Click on the Update button to save changes and the Close button to close this browser pop up.

4 Help Menu

This has several sub menus under Documentation and Support

4.1 Getting Started

This is for Administrators when first installing the software

4.2 User Guide

The User Guide page breaks down all the various tasks completed by the Application into areas on which you can search or scroll through the documents. This is the same content that is available from the help '?' on each page:

Caution: Any special terminology you use in your organisation will not automatically get updated in the help text. The help text may be changed by your Administrator for any specific working practices.

In all pages the blue button with a questions mark gives an explanation of the page and available drop downs and other features.

The example below shows the result of a search on 'status'. The document list has picked up all the documents / pages containing the words 'status'. Click on one of them and the right hand side shows the relevant help content.
4.3 **Admin Guide**

This contains a PDF of the Administration and Configuration Guide. It is only used by Administrators.

4.4 **Operators Guide**

This contains a PDF of the helpdesk procedures. The standard set of procedures and explanation of the features may be modified for your own specific installation by downloading the original Ms Word document from the sitehelpdesk.com support site and changing the Version 8 menu URL.

4.5 **Support**

Provides Links to the sitehelpdesk.com online community which is available to licensed customers, product FAQs and the trial feedback form.

4.6 **About**

The page displays the application, database type and licence information for your sitehelpdesk installation. This information will be required if you log support requests with sitehelpdesk.com
5 Service Management Menu

Service Manager contains all the menus related to Helpdesk Support Requests.

5.1 Call Queue

From this menu all Operators will be able to see any unassigned call tickets, usually those generated by staff themselves. A designated Operator may be responsible for managing this folder. Call tickets may be auto assigned based on the ‘Call type/Category’ or the support Operator or Team assigned to the ‘Site’ selected when logging calls.

5.2 Email Queue

If EMLmonitor has been installed then this menu will be available and shows all the emails that have been received to the Helpdesk email address. EMLmonitor can be configured to generate tickets automatically from emails and also assign related email replies to the original email ticket as an Event. However it may be an idea to keep an eye on the email queue if you are expecting a high priority request or managing automated emails. If you attempt to import an email that has already been converted to a call ticket then the actual ticket will be opened for you.

Only those emails that have been logged as requests (or are obvious SP@M) should be deleted.

There is separate documentation available from the sitehelpdesk community site on configuring and administering EMLmonitor ticketing features.

5.3 My Open Requests

This menu shows you the actual requests that have been assigned to you and you may access them from this menu. See Updating a Request.

You can see the status of each request and any out of SLA alerts that may have been activated based on the SLA Category thresholds for that call ticket.

- Signifies that the call is still in a status of ‘Open’ and SLA Response Escalation time has been reached – this call should have been actioned and warns of impending failure to meet the SLA Response time. Changing Call Status from ‘Open’ will relieve this flag.
- SLA Response time reached and call still has an ‘Open’ status. This call should have been responded too and has failed to meet response SLA.
- Signifies that the call is not yet in a ‘Closed’ status and the SLA Resolve Escalation time has been reached. This call should be closed soon. Setting call to ‘Closed’ status will relieve this flag.
- SLA Resolution or ‘Fix’ time reached. This call should have been ‘Closed’ by now and has failed to meet Sla Resolve (fix) time.
If you have the SLAmonitor add-on module installed then it may be used to inform you by email when these times are reached.

**Hint:** Using the remote access to close calls from a users workstation rather than returning to base will assist you in staying inside SLA’s

You may select a Status / Service Type (e.g ITIL Incidents and Requests) to include in the list from the drop down box.

Note that Service Types may be assigned to Call type/Categories during configuration.

The Last update column includes the name of the last person/process to add an Event. This can be useful to quickly see if a user is still waiting for a response.

Change the sort order by clicking on a column heading. Clicking on a column heading again will change the list from ascending to descending.

Urgent icon  

Paper clip icon indicates that the call has been flagged as requiring urgent attention.

Paper clip icon indicates that call has at least one attachment.

Link icon  

Link icon indicates that a call is a master call with other child call links.

Link icon indicates a child call and mouse over will display the master call id.

Problem icon  

Change icon  

indicates that this call has been flagged as a potential Problem (ITIL).

indicates that the call has been associated to one or more Changes.

The list may also show the number of days since the last event and the time remaining to resolve in hours.

The Print icon will display all call details for the selected list.

To open the Call update page and work on a ticket simply click on a Call id.
Note: Your helpdesk administrator may change the content of the call lists and the default sort order via the Configuration menu option.

5.4 Team Calls

This menu shows all the requests allocated to you, your Team (instead of an individual Operator) and other members of your Team(s). You may be a member of several teams and to accommodate there is a drop down selection to view just your own calls and those assigned to the Teams (not the members) you belong to or each Teams calls separately.

5.5 All Open Calls

This menu shows all open requests currently within the Helpdesk, whoever they are assigned to. Note that if you have Restricted access to see only your own and your Team members calls then this option will not be available.

There is also a view of all Linked calls from the All Open Calls page.

5.6 New Call

This menu allows you to raise a new Call. See Open a New Call section below if this is part of your responsibilities.

5.7 Knowledge Base

This area allows searches on key words to enable you to see previous helpdesk requests with a similar issue to your own. The search may include those with the KB flag ticked from the Call Update page (as well as Link descriptions, FAQ Q/A descriptions and the Work Around on Known Errors from Problem Management. Or you can use the radio button to search all calls regardless of whether they are flagged for inclusion in the KB.

KB searches are also available directly from one of the icon within the Call update page. (see updating a Call). The search is based on keywords. i.e. it will return results
where all of the individual words entered in the search are either in the Summary, Problem, Event or Resolution text (in any combination). The list includes the Call Type / Category. For KB searches related to the current call type / category only see Updating a Call section.

If have access to the Administration menu then you will be given the opportunity to convert a call to an FAQ during Call based FAQ searches.

5.8 Call Search

This allows you to search for a specific group of requests and open them. This may be used in conjunction with KB searches to find information about past resolutions.

Note: You can opt to include a call in the KB searches next time by checking the 'Include in KB' box even when a call is closed and other fields cannot be updated.

5.9 Follow up search

This menu allows you to search for all Follow-ups (diary actions and reminders) that have been booked to a request. See Updating a Call.

You may use this if a colleague is off sick to ensure their work is covered in their absence.

5.10 Attachment Search

This allows you to search for a specific attachment by description and file name and view the file contents. See Updating a Request on more information on Attachments.

5.11 Call Event Search

This allows you to search on the descriptions of specific types of events and shows the requests that have those events. May be limited to a number of criteria and date range.

Hint: Uncheck the ‘include in KB’ box on Calls if they become irrelevant.
6 Tools Menu

This menu allows you access to areas containing relevant information for you to complete call requests.

6.1 FAQs

Frequently Asked Questions, or FAQs, are those requests that can be easily resolved by the end user and do not usually require support calls to be logged.

Management of FAQs requires access to the Administration menu. New FAQs can also be created via Call based FAQ search if you are an Administrator.

6.2 Links

This menu contains links to other files or web pages that may be of use. The links may to files on your network or company or external web sites. Reports and graphs generated from the helpdesk may also be saved as Links for real time reporting.

Think of this as the 'Favourites' for your department and the whole support process. Individual links may be given to staff as well. The Administrator will need to set up these Links and identify if each one is also to be made available to the end users. They may be configured to open in the same or new a browser window.

6.3 Change Password

This allows you to change your password. It is recommended that every Operator do so periodically and the first time that they login to the application.

6.4 Contacts

Provides a searchable list of all the Users held within the Application. This has email links and there is the facility to link to their photograph as well.

6.5 Follow-up Calendar

Provides a display of all Follow ups of all Operator/Teams scheduled for next 5 days. If you have access to the particular type of follow up then you can click through from here.

Note that the number of days displayed and start and end times can be configured by your Administrator using this FAQ.
Other commitments such as holidays and training are also displayed and these may be entered via the Operator Time sheet option…

### 6.6 Operator Timesheet

Displays the weekly time sheet. Time entered against Call Events, Changes and Problems is displayed as HH:MM and allows these to be modified. Also provides further time analysis such as Administration, Holiday and Sickness. These categories may be managed by the Administrator via Value List, TIMESHEET_STATUS.

Click on a day to enter/edit time. **You may also allocate to the appropriate time type.**

### 6.7 Notes

Used to keep your own notes and status up to date and turn on and off alerts. The status and notes are displayed on the home page.

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Followup Calendar

[Image of a calendar with scheduled events for the days 11/04/2011 to 15/04/2011]
7 Call Update Page

This covers the areas that you can or cannot update, and what needs to be completed to ensure the Request is handled successfully.

Any selection of a Call id from Open Call lists or via Call Searches or the KB search option will all bring you to the same Call Update screen on the right hand side. Call information is grouped under 6 headings; Call Details, Date/Times, User Details, Additional Information and Actions.

Note: If you make changes to the Call update page content and selection (other than via Event entry then you must click on the Update button for them to be saved.

Call Details

7.1 Number

The Call id number is allocated automatically by the system.

7.2 Urgent

Tick this box to flag this call as Urgent – this helps to elevate above other calls with the same SLA priority and is indicated by a red ! on the call lists.

Urgent flag may be added or removed on closed calls
7.3 Problem Flag

Check this box if this ticket is identified as being part of a more general or underlying Problem. The ticket will then be identifiable by a cross on call lists.

These calls are then available for review by Problem Managers via the Problem Management, Problem Call Queue menu. An email will be sent to the Problem manager selected in Configuration, notifying them of the new problem call.

A Change Request may also be initiated to manage the resolution once identified.

Problem flag may be added /removed on closed calls.

Problem managers will also see a icon where they can manage problem calls directly. Refer to the separate problem Management section below.

7.4 Inc in Kbase Field

If the request would be useful for future resolutions then this field can be ticked to include the Call details in searches over the Knowledge base.

Include in KB flag may be added or removed on closed calls so once it is out of date is can be taken out of KB searches

7.5 Print details icon

Using the Print detail icon allows you to see all the details of the request and print them off from your local printer, using the File, Print option. This is useful as a worksheet if you need to visit the requestor to resolve their issues.

7.6 Loans / Issues

Displays the items available for Loan or Issue from stock to satisfy requests made via call logs.
Select the stock item that will be issued or loaned and the quantity. The item will include the stock reference.

Note that issues will be permanently removed from stock. Loans will reduce the stock available for loans and issue but the actual number in stock remains the same.

The management and reporting of loans and issues and entries into the stock library are managed from the Asset Management menu. Refer to this guide.
http://www.sitehelpdesk.com/docs/stockControl.pdf

7.7 Linked Calls

Provides a list of all calls to which this ticket is ‘Linked’. The master call ticket will display a link icon next to them in the call lists. If there are already linked calls then the icon will have a red tick. Calls may also be linked upwards to a Master call.

You may click on a related call id to open it. You may add more links here and find them by searching on text or remove links by clicking on the red X. There is a call id and text search available to assist.

A call with links associated will display a red icon in the link icon.

Note: you may also create a linked call ticket using the New Call button and Template calls.
You may close all related calls when the master call is closed, with the same resolution text being automatically entered in all the related linked calls. This will also update any On–Close Extra fields configured with the same text or selection. It will also email the users on the linked calls with the resolution if automated emails to users when a call is closed is configured.

7.8 Change Management

Change Management is an optional feature. This icon only appears if you have the necessary Operator Access Control.

Use the Change Management process to control the planning and implementation of Changes.

Refer to the separate section in this document if this feature applies to you.

7.9 Problem Management

Problem Management is an optional feature. This icon appears if you have the necessary Operator Access Control.

Use the Problem Management process to manage the resolution of incidents that are identified as broader problems.

Refer to the separate section in this document if this feature applies to you.

7.10 Summary Field

This is the Title of the Request which may be up to 100 characters long and is used in all email communication by the system. The emails include the Call id which is critical for EMLmonitor to be able to relate replies to the original ticket. Therefore, do not edit the subject line if sending event Actions as an email.

7.11 Search Knowledge Base icon

Opens the KB search window and passes across the summary line text. The search may be refined and based on key words or the exact phrase and then a selection made if a useful resolution is found. The resolution is then appended to this Call. The search also allows you to select all calls regardless of whether they have been flagged for KB inclusion. The list includes the Call Type / Category, which may help re-categorise this ticket and associate to relevant FAQs. You may enquire on the tickets and add / remove KB flags even after they are closed.
If you have access to the Administration menu then you will be given the opportunity to convert a call to an FAQ during Call based FAQ searches.

Selecting a Problem, Known Error Workaround will also associate that call to the Problem automatically.

7.12 Description field

This shows the initial incident or request as outlined by the Requestor.

Date / Time

7.13 Date Field

This shows the date and time that the call was opened and the SLA clock started running. SLA Escalation and Overdue flags for Response and Resolve are displayed alongside the times.

7.14 Response Time

This is used for the calculation of Response times against Service Level Agreements. The Response time is set by selecting a new Status for the Call to indicate that work has commenced, usually a status of ‘In Progress’ is selected as soon as the Operator picks up the ticket to work on it.

- Call is within SLA.
- Call will soon fail SLA response time.
- Call has failed to meet SLA response time

7.15 Close Time

This is used for the calculation of Fix times against Service Level Agreements. The Close time is set by selecting the closed Status for the Call which indicates that work has been completed and the ticket resolved.

- Call is within SLA.
Call will soon fail SLA resolve times.
Call has failed to meet resolution SLA

7.16 Due Date

This is an optional field that may also be made available to End Users. The general purpose is to record when the call request actually needs to be completed, regardless of any SLA category thresholds. You may use the calendar icon to select a date.

Calls with a due date will be displayed on your welcome page before they are due.
User Details

7.17 User, Phone, Site, Department

This information is relevant to the requestor and may have been changed from their defaults in recognition that people do move around and support may be required in a different location to where they normally reside.

The user details and photo (if present) are available by clicking on underlined User text.

Displays a list of all incomplete calls for that user, site or department so that you may consider working on one or more of those issues at the same time, particularly if you will need to travel some distance to resolve each one.

Call Status

7.18 Call Type / Category and Sub Category

Note that with the introduction of an additional third level of categorisation in version 8, some terminology changes were made. Call Type / Sub Type is now referred to as Call Type / Category / Sub Category.

Sub Categories are optional for each Category.

If the call is logged by an end user then they may have been presented with a limited number of call types and categories. They can be changed if the investigations into the issue show that the initially selected types were incorrect.

This is very useful for reporting and analysis problem trends later so double check their suitability.

If the Technical Service Catalogue is turned on in Configuration then this icon displays relevant contents.
7.19 Search Knowledge Base icon on call Category

Opens the KB search window and displays FAQs for that specific Call type/Category.

7.20 Problem Analysis

Provides an enquiry on the last 12 month trend for the Call Type / Category of the selected Call ticket. This may be enquired upon further by clicking on graph bars to investigate call details to look for problem trends, common types of issues, if there are similar open tickets that may be linked (see below) or if some remedial action, such as training or upgrading systems may resolve the problem altogether. The effectiveness in resolving underlying problems may be seen later by a reduction in the numbers of such call categories.

If this ticket is identified as part of a more general Problem then check the Problem box under the Details section.

7.21 Operator

Displays which Operator has been assigned to this call ticket along with their current status (if not set to Available).

If you have the appropriate privilege provided by the Administrator then you may re-assign call requests as needed. The drop down list is organised Team/Operators alphabetically.

Displays a list of Operators and Teams that you may assign / reassign the call ticket to. The list is sorted by order of priority workload. See the New call section for more information.

7.22 Priority

This indicates the Priority of the request. This helps manage Service Level Agreements and defines the automated email alerts if SLAmonitor is installed.
Do not change these unless you are aware that they are specifically incorrect for this type of request.

Displays all the available SLA Priorities along with the associated Escalation, Response and Fix times.

### 7.23 Status Field

This field shows the various statuses that the Request is at or can be progressed to.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Open</strong></td>
<td>It is not in progress at this stage and should be re-assigned if need be and changed to In Progress as soon as possible.</td>
</tr>
<tr>
<td><strong>Deferred</strong></td>
<td>The request has been put on hold whilst more information is sought from the Requestor or because it has been passed out to a third party. This state stops the SLA clock (if SLAmonitor is installed)</td>
</tr>
<tr>
<td><strong>In Progress</strong></td>
<td>The request is being worked on and a Response time is set (visible at the bottom left of the Call update page)</td>
</tr>
<tr>
<td><strong>Closed</strong></td>
<td>The request is complete and the close time is set (visible at the bottom right of the Call Update page). You must enter a resolution text before the call will be saved.</td>
</tr>
</tbody>
</table>

Other Statuses may be available and these will have the same affect on SLA’s as ‘In progress’ unless specified as ‘deferred’ in SLAmonitor.

These Statuses may also be altered from within the Event entry window at the time of writing any actions taken to resolve the call.

### 7.24 Asset Number

This is an optional field. Refer to Asset Management section for full details on using the available features.

### 7.25 Hardware Inventory

Displays full inventory details if the facility has been turned on to record inventory against calls. Refer to the Asset Management section of this document.

### Additional Information

### 7.26 Extra Fields (1, 2, 3, 4, 5 and 6)

These are optional fields that may also be made available to end Users. They may be drop down selections or free format entry and may only be required when a call is closed.
Call Actions

7.27 Event Fields

The Event log shows all the changes and updates the Call has been through. It is updated with all changes / updates whether from Requestor, Operator or the system.

Selecting **All / Op / User / Sys** only show either the Operator, User or System generated Events.

You can view Events, Tasks, Attachments, Follow-ups and Scripts from the same pane.

![Event Fields](image)

There is a display column showing what is viewable by the User which can be unticked via the Event window. Note system events can be turned on or off from users view globally via the Administration Configurations Page.

Open the corresponding Event. You will only be able to edit the text, time and expenses for events that you have created. You may also opt to exclude this event from the end user’s view.

Click The Events button on the left to view the event history and click the Add Event button on the right to add / email a new event.

7.28 Add Event button

This button allows you to add an event and allocate your time spent on that event. It also allows the Status to be changed.

Event Time may also be recorded in increments of 5 minutes via the drop downs with a Type for time sheet analysis. You can preset a default time for Events, email support@sitehelpdesk.com for instructions. The Type can then also affect the charge rate used by applying a multiplier automatically.

Any Expense entries are reported on billing reports along with the time.

The Call Status may be updated and the call **Reassigned** from here.

If the display box is ticked then that event and comments are visible to the Requestor. If it is not ticked then the Requestor does not see the event.
The updated event can either be ‘saved’ or ‘saved and emailed’ to the requestor.

You may insert url’s for your FAQs and helpdesk Links directly into the Event using the buttons. You may also type valid URL’s directly into the text box. This must be in the format http://www.domain.com i.e a full url not just www.domain.com. These will then appear as links in the Event window, make sure you put a space after the URL to make it active.

You may select a standard Reply to insert in the Event, these are set up via Administration.

If your helpdesk is configured to send Event emails by the System, rather than your local email Client, then you may also add attachments and include them in the email.

Note: If your helpdesk is configured to send event emails via your email client then the email system used is the one set up in your browser tools, programs option. You must add any attachment from there before sending. Also note that system emails have a standard ’signature’ but you may add your name to the bottom of the event if you wish.

Adding new attachments to the call as well as the event is a two step process, first it attached to the call then you select it to add to this Event.

You may spell check and preview the email format of the Event before sending.

When you click on save and email you may, if configured, have been given the option to include other members of staff on the event email, you may search for these.
If the display box is ticked then that event and comments are visible to the Requestor. If it is not ticked then the Requestor does not see the event.

When you ‘Save’ or ‘Save and Email’ an Event on a Master call you are given the option to also add that event (and email) to all child calls. Select OK to add / email child calls or Cancel to proceed with the save / email only to the current call.

Note: writing an event and also selecting the Closed status will write that event to the resolution field and if the Operator has not been assigned it will be set to the current operator.

7.29 Tasks

Some call Categories may have a set of tasks associated with them. These are accessed from the Tasks link button which also displays the ‘tasks completed/total tasks’.
Tick the task as done when you complete them. You cannot close a call that has incomplete ‘Required’ tasks. Tasks may have been configured to automatically reassign the call and change the Status. Events will be written if this is the case and email notification sent to new Operator.

7.30 Attachment button

The Attachments button will show you any file attachments that have already been added as part of the request. If there are attachments already on the call then the number will appear in brackets on the button. From here you may click on the attachment link to open it (in a new window) and you may check/uncheck whether they may be viewed by users. You can also delete attachments that are no longer relevant.

When attachments are being viewed, an Add Attachment button will appear on the right of the view pane to allow you to add your own.

To add an attachment enter a suitable description; browse your pc/network for the file, uncheck ‘Display to User’ if this should not be viewed from their support pages and click on add attachment.

Select attachments from the list to view them. There is an option to sort by Description and Date and you may check/uncheck whether they may be viewed by users.

A copy of the file will be sent to the designated location on the server so that it is always available to all users of the helpdesk. There are time out limits to protect the server form excessively large files. Attachments can be hidden from the Requestor.
7.31 Follow up button

The follow-ups button shows any diarised events on the call with a click through to the actual diary event which may be edited or deleted. You may mark the follow up as complete from the view pane.

When you view Follow-ups an Add Follow up button will appear on the right of the view pane. The Add follow up button allows you to create diarise events in the future that need to be completed for that support request. You may also return to follow ups here and select them from the red icon button and then edit them, delete them or flag them as complete.

The next seven days follow ups are displayed on your home page.

7.32 Script Info button

The Script Info button will appear only if a response to scripted questions was generated when the call was logged. The view pane displays the results of the Script questions and answers. There is an Administration option for Scripts to be presented to Operators and Users as a Form, in which case the script results will be displayed in the Description field instead of being under a separate script view.
7.33 Event time Field

This is the sum of time entered via the Events window and shows the total time spent on the Call to that point in time. (renamed from 'Fix' in version 7.9 to avoid confusion with fix SLA times).

7.34 Est time Field

This can be updated at the first stage of the process to indicate the expected time to complete the request. This will help in tracking actual versus estimates. May time may be preset on a Call Template.

7.35 Resolution Field

This field is completed when closing the request with a description of the resolution. This will aid in improving knowledge and future resolutions.

Enter enough information so that others may benefit from your wisdom.

Caution – don’t forget to change the status to Closed or the SLA clock will keep ticking!

7.36 Update button

This is used to update (or save) the request after changes are made to the main Call update page. Changes via the Events box are saved automatically. If the update has not occurred a validation error message is seen at the bottom of the screen (or optionally in a pop up window) indicating reasons why it could not be saved.

7.37 Spell checker

Click the spell check button to check spelling in summary, description and resolution fields.

7.38 Approval button

If configured, this opens a page where you can make a selection to email any number of staff who have been flagged as an approver.
Enter some text or insert a Reply from your Event reply list. Save and Email to send an email to the approver(s) which contains a link back to an approval page like this. Note that you must be using Windows Authentication to use this feature as a safeguard to ensure that only the actual approver is able to access the approval page link.

Once the User selects Approve or Decline and writes a Comment then Updates, an event is written to the call and the Operator notified by email.

7.39 New Call button

This takes you to a new Call option to raise another ticket using the information contained in the current one.
These new calls may be linked or unlinked.

Linked calls may all be closed all at once later if you wish which is useful for recording repetitive calls associated to a single event such as a major service outage.

The master call ticket will display a link icon next to it in the call lists.

You can review a list of all Linked calls by clicking on the link icon in the Call update page and then open a linked call if you wish.

You may close all related calls when the master call is closed, with the same resolution text being automatically entered in all the related linked calls. Note it will not email or update resolutions of linked calls that have already been closed.
8  Raising a New Call Ticket

Entering a new call from a telephone call or personal visit is quick and easy to do.

8.1  Finding the User details

Use the Quick search facility to find a User. Just type in any part of their name and press return or click on Search to display all users with those characters in their name. This does not need to be from the start of their name, as the search is based on whether the name 'contains' these characters. It also allows for names to be entered in any order e.g. a search on John Smith also finds Smith, Mr John.

You can select a Department, Site or enter their login ID to narrow down the selection further if need be.

Click on the name to generate a new call screen pre populated with that User’s details.

Note: The Add user button in the screen example will only appear if that configuration privilege is set by the Administrator. This is usually only made available when the user records are known to be incomplete so that if you cannot find a user record you then have the option to create one now.

If you are not sure whether this request has been logged before then click on the icon button next to their name to open a list of all their open calls.
**Call Type / Category**

Select a call type. The related Categories will be retrieved. Then once a Category is selected some may have a Sub Category to select as well.

Some Call Types/ Categories may already be set up to auto assigned an Operator/Team and also the SLA Category.

They may also invoke a Script when Log call button is pressed (see below) or present the script questions as a Form in the Description box. 

*e.g.*

**Call Details**

<table>
<thead>
<tr>
<th>Summary</th>
<th>A summary must be entered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form Questions</td>
<td></td>
</tr>
<tr>
<td>Is the printer locally attached to your PC?</td>
<td>□ Yes □ No</td>
</tr>
<tr>
<td>Ensure that the cable between the PC and Printer is connected.</td>
<td>□ OK</td>
</tr>
<tr>
<td>Is the printer turned on and loaded with paper?</td>
<td>□ Yes □ No</td>
</tr>
<tr>
<td>Turn the printer on and load paper.</td>
<td>□ OK</td>
</tr>
<tr>
<td>Please enter the make and model of the printer.</td>
<td></td>
</tr>
<tr>
<td>An engineer will contact you shortly.</td>
<td>□ OK</td>
</tr>
</tbody>
</table>
If Service Catalogue is turned on then you will see icon by Call type/ Category, this will display the details of the catalogue and can be useful in identify the correct category to use. If no category selection is made the entire Service Catalogue list is presented, if a selection is made only that catalogue entry is presented.

The category may also invoke a Script later (see blow)

There is a knowledge base search that will return FAQs associated to the selected call type / categories which is useful for quick resolutions over the telephone.

8.2 Assigning an Operator or Team

The current operator (you) are assigned automatically when first going to log a call. This may be overwritten automatically by the Operator or Team name set against the call type / category. If an operator has not been automatically assigned based on the Call type selected then you may either select them form the drop down list (which also displays their status if not ‘Available’) or use the icon button and obtain a list of Operators and Teams. This lists them in order of work load. Their Availability (or skill set) and any other comments are also available to aid with the selection of the most appropriate person.

Place the mouse over the icon button to see any notes added by the Operator and click to assign.

8.3 Configurable Optional Fields
The New Call screen above displays the Extra 1 and Extra 2 and Due Date fields which may or may not have been configured for inclusion in your installation by your Administrator and may be named something else.

8.4 Subject and Description fields

Enter a brief summary of the call and detailed notes. These may be unlimited in volume.

8.5 Spell checker

Click the spell check button to check spelling in summary and description fields.

8.6 Scripts

Clicking on the Log Call button may result in a script being run to gather more information about this type of call. These are set up by the administrator and are useful for gather information that is only relevant for that type of request, without cluttering up the call log page with additional fields which are often not relevant.

Script information will be available from a button on the Call Update page which only appears when there is a script.

8.7 Log Call

Once the new call is logged, you are taken directly to the Call Update page where you can continue to work or even resolve that call if you wish. If you assigned this to somebody else and have Restricted access to see your Own/ Team calls and then you may be blocked from getting to the Call update page. You can add any attachments here though.
The Request will be flagged as Open and is listed in both in the Users Call history screen and in the Open Call Lists. The Assigned Operator will receive an email alert if configured.

**Tip:** If you are in the process of creating a new call and wish to start another new call record before completing the current one then place the mouse over the New Call menu option and right click the mouse and select ‘Open in New Window’.

If the requestor requires an email notification then click on the email icon from the Call update page and Send.
8.8 Using Templates

A Templates drop down will appear on the new call screen if your Administrator has activated them.

This can be used to generate one or more call tickets with one or two mouse clicks. This is very useful for recording call tickets after the event or for generating multiple tickets for certain procedures.

Simply select the User and Template, in either order, and then optionally change the Operator and click on ‘Log Call’.

Template Calls can even be pre assigned as Closed, requiring no more action by you.

Note that templates may be set up with the Operator set as {current} to always default to who ever is logging the ticket.

Master Templates are prefixed with an * in the Template Call drop down list and the number of associated Linked calls that will be auto generated are shown in brackets next to the description.

Once a template is selected you can click on the red icon button to view details of all related calls that will be generated.

Caution: if validation fails during a new call using a template then the template must be reselected.
9 Change and Release Management

Use the Change Management process to control the planning and implementation of Requests for Change (RFC’s).

Note: This icon only appears on the Call update page if you have the necessary Operator Access Control set.

From the icon on the Call update page you may
- Associate the call to one or more existing RFC
- Create a new RFC
- Manage the life cycle of an RFC that is associated to this Call.

A red arrow appears on the icon if a call has an RFC already associated and a list is provided of all current RFC’s associated to this call ticket.

Note: Before creating a new RFC always check to see if you can Link to an Existing RFC that will solve this problem.

Logging New RFC’s
Either from within a Call via the Change icon and the Log New RFC button
or from the New Change in the Change Management menu.

Users may also have been given the option to log their own change requests and/or view their change history and add Events to them.
If logging via a Call then the Call Summary and Description are carried over but may be edited. No other fields need be completed at this stage unless they are one of the 8 new Extra fields configured as 'Required'.

Click on **Log Change** when you have entered as much detail as is currently available.

**Managing Requests for Change**

Update the RFC from the Change tab and follow the status steps required before approval.
Operator:
As with Calls this is used to assign each stage of the change request.

Status:
These can be pre set by your Administrator (Value List CH_STATUS) to signify the stages you take to complete the life cycle of changes in your organization.

The status **Complete** will remove the change from the Open changes lists.

You may change the status and record the actual work carried out at each stage using the **Add** button next to the **Events** log.

The Status may also be automatically changed as Tasks are checked off. Note that Tasks are pre-set against change Types (see below)

Impact:
This may be used to set an indication of the level of importance. The drop down list is administered in Value List CH_IMPACT

Ch. Extra:
Terminology of this and other fields on this page may be changed in Administration, Configuration. Change Management. The value of this drop down is set in Value List CH_EXTRA1.

There are 8 additional configurable Extra fields that may be drop down, text entries, check box or Yes/No responses. Configured by Administrator and selections set in Value List CHANGE_EXTRAx. These may be optional fields, required or only on Completion.

Due Date:

This may be used as an indication of when it should be completed.

Requested By:

May be used to identify the key stake holder(s). A separate record of all Users (stake holders such as change board members and other interested parties) is automatically created each time somebody is selected and the page Updated. You can also add Users from the User tab.

Type:

The types of change such as Standard (pre approved) or Normal (ITIL recommendations) may be set in value lists CHANGE_TYPE. You may then create a specific Task list set for each Type of change request. These may be used to introduce a work flow by auto changing the status and they may also be set as being required to be done before the Change Request status can be set to ‘Complete’.

If Tasks have been set for a specific Type of change then a Tasks button appears on the left of the Event log. The button displays the number of tasks done/total. Click the task button to see the list and then click ‘Done’ to update tasks. This will automatically change the Status to those pre-set against each one.

Note that tasks may be setup as not being ‘required’. In the example above you could allow the change request to be set to ‘Complete’ if approval is not granted if all the remaining tasks were not set up as ‘Required’.

Approval:
The approval status is automatically set by the response of approvers:
Declined: if approver has Declined the approval request.
Pending: waiting for one or more approvals
Approved: Approvers all flag as approved.
Events:

Record the activities carried out and any time spent. You may change the status from here as well.

You may ‘Save and Email’ Change events with the opportunity to select other people to be included with To: CC: and BCC:

The icon will display a printer friendly view of all the details for this RFC.

You may also add Attachments and diary Follow ups to an RFC.

Approvers:

Click on the Approvers button to view the progress of approvals and click on Add Approver to send out new approval requests.
This lists all the Users that have been flagged as Change/Release Approvers (in the Administration, User menu).

You may send multiple emails to all the approvers in one go and edit the text that it sent with the link to the approval page.

The email sent contains a link to a special page to Approve or Decline the change. Note that if using Windows authentication then the user id is checked before access is given to the page. The approval page contains all the change details and radio buttons for them to select and that may also enter comments that get written the change events log.

You may view the status of approvals being accepted or rejected along with any comments made from the Approval window and follow up on any that have not responded.
Release

Depending on your internal procedures you may use the **Release** tab to obtain final approval and record release details of the change before implementation / release.

All changes to fields will be recorded in the RFC Event log.
Rel Extra:

Optional field. The terminology can be set in Administration, Configuration and the drop down value set in Value Lists, REL_EXTRA1

Reference:

There is a Reference field to record the Definitive Software Library (DSL) reference if applicable. Or terminology changed and used for another function.

As well as Change approval, there is also Release Approval. This lists all Change Approver Users, any of which may be selected to approve this change for release.

You may then send them an email from the icon, which contains a link to a special page to Approve or Decline the final release, in the same manner as the Change approval process.

Release Date: Time: Duration:

Enter the scheduled planned release date and time and the duration that it will take. This will be useful for scheduling against other releases and reporting of 'planned down time'.

The **Release Schedule listing** is available from the Change Management menu.

<table>
<thead>
<tr>
<th>RFC</th>
<th>Operator</th>
<th>Release Date</th>
<th>Time</th>
<th>Duration</th>
<th>Impact</th>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>admin</td>
<td>28/10/2012</td>
<td>22:00</td>
<td>1 hour</td>
<td>High</td>
<td>demo</td>
</tr>
<tr>
<td>13</td>
<td>Hary</td>
<td>30/08/2012</td>
<td>13:00</td>
<td>2 hours</td>
<td>Medium</td>
<td>demo</td>
</tr>
</tbody>
</table>

**Back Out Plan**

Record the Back Out Plan should the change initiative prove unsuccessful.
Individual RFC’s may also be associated to a number of calls, items of Inventory and Users. Use the **Call** tab to associate or dissociates Changes to Calls.

You can add calls using the call id or text search to help find them:

Calls with change request associated to them will display arrow in the change management icon and an icon on the call lists

Use the **Hardware** tab (only available if the operator has Inventory management access rights) to associate the RFC to items of hardware to be changed.
The **User** option may be used to identify the ‘Stake holders’. Those people interested or affected by this change. These are added automatically when the Requested By user is selected but others can also be added here.

![Change Management](image)

The add button will list all records. Items drop off this list as they are selected. Use the X to remove items from the change list.

Both Hardware and user tabs have a **Done** check box which can be used during the release phase as each inventory item is changed and / or each User notified.

Change history information is available from within the Hardware Inventory enquiry

**Managing Associated Changes and Call Status**

The Change / Call Report is useful for periodic management of changes and calls to make sure that corresponding status changes are made and all related calls are closed and users informed.

![Change / Call Report](image)
10 Problem Management

Use the Problem Management process to identify Problems, flag as known errors and devise work arounds which are then available via FAQ searches. The process also allows Project Managers to decide on a permanent solution to a problem outside of Call Management.

The icon only appears on the Call update if you have the necessary Operator Access Control set.

- Problem may come to the attention of Problem Managers by an Operator flagging any call as a Problem simply by ticking the problem tick box.
- An email notification can then be sent to a nominated email address (set in administration configuration, problem Management section.
- Problem calls then appear under the Problem Management, Problem Calls Queue.

Problem managers may then click through to the call and decide whether to add to an existing problem, create a new Problem record or uncheck the Call Problem flag.

Click on the icon to **Link to an existing Problem** or **Log New Problem** record. Note you can also create new Problem records directly from the Problem Management, New Problem menu option.
You only need to enter a Problem description at this stage.

Once a new Problem is created it is given its own unique id and further details can be entered.
Operator:

Only problem Managers and Team names are listed here. This is set via Administration, Operators access rights.

An email is sent to the assigned Problem.

Impact, Classification and Status

These are configurable selections. Set the drop down values up via Administration, Value Lists. (PROB_IMPACT, PROB_CLASS, PROB_STATUS)

The Status ‘Closed’ will exclude it from the Open Problem list.

A Close Summary must be entered to close a Problem. When a Problem is set to Closed there is an option to close all related Calls.

Linked Calls:

Use the Add feature to associate to other Open calls or click on the red X to unlink a call if an error was made.

This can be used to link a call to a problem and indicates the extent of the problem and impact on users. The number of Linked calls is available from the Open Problem Lists.

Associated a Call with this Problem will check the Problem box on that call which in turn indicates it as a problem on the Call lists with the icon.

Work around:

Once a method of resolving the Problem is found, describe it here. This may be a temporary work around until full update is made to all affected systems.

Known error:

Ticking the Known Error box will make the Work around available via Call based FAQ searches.
Note that calls are then linked to that Problem automatically when selected as a solution via FAQ search and will check the Problem box on that call which in turn indicates it as a problem on the Call lists with the icon.

Events:

Add events to identify work being done on the Problem review.

Close Summary:

This is required to change the status of a Problem to ‘Closed’
11 Configuration items (Asset Management)

This section explains the Asset/Inventory management features available from the sitehelpdesk-IT Call update page.

Other sitehelpdesk-IT features for the management of stock loans and issues, various registers for IT related services and inventory records for DR purposes are not explored with in this document.

11.1 Asset No. Field

To identify a specific item of equipment to a call ticket, place the cursor in this field or click the red arrow next to it.

A window will appear that lists the items specifically associated with the Requestor and Inventory items associated to their department.

Depending on your configuration, you may be using the Host Name, your own Asset number or the hardware Serial number to identify inventory items. Any of these may be searched on.

Select the item using the red icon button next to the list otherwise search by entering the asset number, Host name or serial number and click on the red search icon.

This will populate the Call update page with the inventory identifier.

Click on the Update button to save this value to the Call update page.

Clicking on the inventory red button or going into the field will display the list again with the option to remove the linked asset number.
11.2 Updating Inventory details

You may open the asset records from the icon button on the Call update page.

Note: field names may differ from the above screen shot depending on the terminology configured for your system.

You may update the Inventory record from here. It is especially important that you amend the User details and Location if items are reassigned or moved. This information is used in insurance valuations and disaster recovery packs and therefore must be kept up to date. Note that a different form lay out may appear depending on which Type of asset is selected. Refer to Administration, Inventory Form Design.

Another important option for day to day management of hardware is the Log fault option. See below.

Click on update after making changes. All changes are then written to an inventory event log.
11.3 Asset number

Depending on your configuration, the key field used to identify Configuration Items may be asset number, host name or serial number and may even have terminology changes for these fields.

11.4 Linked assets

Inventory items may be linked one to another. ITIL refers to these as Configuration Items (CI). From the inventory or CI at the highest level ie that has other items attached to or reliant upon, click the red arrow to select associated CI's.

The CI Type is included in the drop down selection of those that have been associated to clarify the relationship. A Linked CI may be selected and viewed /updated. A master linked CI is indicated with an * (asterisk).

A view of linked CIs is available from the Hardware Inventory menu option.

11.5 Call History Button

This provides a list of all past call requests for this inventory item. This is very useful for managing recurring problems but may also give some indication as the reason for more recent problems.

Drill into the call details to from the call id link for more information. Close the window again using the X on the top right hand corner
11.6  Change History Button

Provides details of all RFC’s associated to the inventory item with status and Done flag.

![Change History](image)

11.7  Hardware Details Button

This will provide a real time enquiry on the full hardware and software configuration details for that inventory item that has been collected by your chosen PC auditing tool.

Depending on the tool used you may then also have options for reviewing configuration changes which will identify software and hardware that has been recently added or removed. This can be very useful in trouble shooting hardware faults.

11.8  Type Field

This is the type of inventory item (CI) assigned when the item was created and not usually amended later.

11.9  User Field

Identifies the name of the user or department that the hardware is registered to.

You must update this if reassigned to a new owner.

11.10  Department

This is displayed from the assigned user details.

11.11  Site Field

Identifies the main site or geographical location of the item.

You must update this if you move the item to a new site.

11.12  Location

Identifies the exact location of the inventory item within that site.
This may be free format or drop down depending on your configuration. You must update this if the item is moved within a site or to a new site.

11.13 **Make**

Make of hardware, not usually changed after set up.

11.14 **Model**

Model for that make and may be free format entry or a drop down selection related to Make.

11.15 **Serial number**

This is usually the machine bar coded serial number but may be one of your own asset tag bar codes. You may scan this in using a hand held scanner. Refer to PDAmonitor documentation for more information on scanning.

11.16 **Purchase No Field**

Identifies the original purchase order number relating to the hardware. This is useful if warranties apply.

11.17 **Purchase Date**

Purchase date of hardware to help track warranty expiry.

11.18 **Cost**

Purchase cost or replacement value of hardware for Insurance valuation reporting.

11.19 **Warranty Period**

Number of years warranty from the supplier.

11.20 **Operating System**

Identifies the operating system but is not mandatory as does not always apply.

11.21 **Maintenance**

Identifies the company who maintains/supports the hardware. This may be the supplier under warranty or an outsourced maintenance provider. The available list is maintained in Business Continuity, External Contacts Maintenance menu option.

You may now drill into their details using the **Info button** for reference then close the window afterwards. The Service types are set under Value Lists EXTCON_SERVICE.
11.22 Processor

Processor speed of the hardware used in 3rd party maintenance schedule.

11.23 Memory

Record of the amount of memory in the hardware which is used in 3rd party maintenance schedule reporting.

11.24 Spare Fields

There are up to 4 additional fields that may be configured with their own name and be set as free format or drop down selections via administration configuration. Selectable extra field have their values set in Administration, Value Lists, HW_SPARE1 to 4.

11.25 Last Audit Date

This is used to keep a record of when physical audits have taken place. Information is available on hardware report builder. Click on the date icon to update with today's date.

11.26 Comments

Update any general comments relating to the hardware.

The following options are also available:

11.27 Update Button

Will save or update any changes made to the hardware record and wrote an event log.

11.28 Attachments Button

Related Documentation may be attached in exactly the same way as attachments are added to calls.
11.29 Follow up button

You may schedule follow up reminders that will appear on your home page. This can be sued to remind you of pending maintenance renewal or scheduled maintenance.

11.30 Disposal / Reinstate Button

If hardware is to be disposed then enter details here of how, why and where it was disposed of.

Note: For security reasons Hardware details cannot be deleted directly from within sitehelpdesk-IT.

Once deleted then the Dispose button will change to Reinstate which can be used if the item is brought back into commission.

11.31 Log Fault Button

If hardware has a fault or needs to be returned to supplier or a 3rd party maintenance company then log that here. Having set a maintenance company on the inventory management page, this can be used to log service requests with them or another company selected at the time of logging a new fault with them. The number of historic fault logs is displayed on the button.

Select the Contact type (e.g 3rd Party or supplier) and select their name from the drop down list. This list is maintained from the Business Continuity, third party contacts list menu.
This will record a call event record on the call update page. It will also be registered against the hardware record and on the fault log in the Hardware Inventory, Fault Management option.

Log a call request with the company using their preferred method and record the details here.

They will indicate if this is an onsite visit or if the item must be returned to them and also provide a call reference id of their own. Enter these details and any other details with a description of the fault.

Click on **Log Fault** button. Attachments may then be added.

The Fault is updated and flagged as complete by entering a Fix date against the record from either this hardware page (fault logs are listed at the bottom of the screen below the audit trail) or from the Hardware Inventory, Fault Management option.

**11.32 Add /Remove from Stock Button**

Equipment may be transferred in to stock. This may occur because a the machine is beyond immediate repair or the User has left and the equipment is then available for loan.
Enter any stock reference number and related comments and click on Save. This item is now available for loan or issue from the Inventory Management, Loans/Issues menu option.

The item may be taken back out of stock and re-assigned later by selecting the same button (automatically renamed ‘remove from stock’.) on the Hardware Inventory Maintenance page. Refer to this Guide. http://www.sitehelpdesk.com/docs/stockControl.pdf

11.33 Duplicate Button

Allows rapid manual entry of similar inventory items. Do not use unless it is part of your responsibility to enter new inventory items. You will receive a confirmation page if you select this option. Say No if it was in error.

11.34 Audit Trail

An audit trail is maintained when the hardware is moved to another site or associated with a different user, disposed of or moved into/out of stock. Use the right hand scroll bar to scroll down the page to review audit trials and maintenance logs.
11.35 Hardware Faults Listing

An audit trail is kept of fault logs. Drill into details to update by clicking on the date.

Enter a fix date when this fault is resolved.

Note: that the original call ticket id is recorded against the hardware fault log for reference.
12 Automated Alerts

Automated Email or SMS Alerts are configurable by the Administrator and the following are all optional. Operator may opt in and out of both of these and individual users may be flagged not to receive emails. It is useful for Operators to be aware of when these may be sent. The following situations may invoke an automated email / SMS alert:

- To Requestor when a new call is created

When a call is first created by a member of staff or Operator an email providing the call id and the details is sent to the requestor.

- Operator reassigned to an existing Call

When reassigning, all attachments on the ticket will be included in the email notification to the new Operator. Note: assigning a call to your self will not generate an email notification.

- SLAmonitor Alerts

When the Request is falling outside the expected escalation, response or fix time, an automated email is sent to the SLAmonitor nominated person (set up under Administration Category) and the Operator assigned to the call.

- Closure of Call

When the Request is closed, an email is sent to the Requestor to indicate this has happened.

- Requestor adds information

When the Requestor adds an event, closes or reopens their own call ticket from the User Call history enquiry screen an email is sent to the selected Operator.

- To Assigned Operator when another operator updates their tickets via Events

- Follow Ups due

SLAmonitor may also be used to send automated emails to an Operator when their follow ups fall due.

- New call generated by EMLmonitor

EMLmonitor automated ticketing may be configured to automatically notify the requestor of their ticket id by return email.

- When the User Feedback form is completed

Notified to a nominated person in the User Call logging option section in the configuration page.
13 Dealing with application page errors.

In the unlikely event that you encounter a page error in the application.

- Take a copy of the page error including any information further down the page.
- Inform your helpdesk administrator
- If you are the nominated contact then login to the sitehelpdesk.com community web site at http://www.sitehelpdesk.com/community
- Check the FAQs for that error
- If not found then log a support request making sure any error codes and associated text is included or attached to the call log.
- Include a description of what you were trying to do and any entries you made to the system.
- Record your sitehelpdesk application Version and database type on the call – you can find this under the Help, About menu option.