



Easy Manage ® Helpdesk Program Guide

Version 4.4

**The System Management and
Configuration Tool
for your Complete ICT infrastructure.**

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About This Guide

The purpose of this guide is to assist the ICT department by managing all components in the ICT infrastructure. This guide will explain the working of the Easy Manage Helpdesk Program.

Other Easy Manage Manuals are:

- Easy Manage Configuration Guide
- Easy Manage Admin Guide
- Easy Manage Reference Guide

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Easy Manage Helpdesk

General

The Easy Manage Helpdesk consists of two programs and is integrated in the Easy Manage Tool. The Self Service Helpdesk could be used by the end-user to register and track a call. The integrated Helpdesk module in the Easy Manage Tool is for the IT department to register and manage calls.

Conventions

All list screens have default New, Open and Delete functions; both New and Open functions will supply the detail screen. Double click on a row in a list screen activates the same function as Open. The button New will create a new object and Delete will delete an object from the database. On Tab's you could see the buttons Add and Remove. An Add will create a relation and a Remove will remove a relation to another object in the database.

You can only delete a component, if it does not have a relation with another component.

In the Easy Manage screen shots, you will find gray, white, blue and yellow fields to store information. The gray field contains read-only information, the white fields contain optional information, the blue fields contain important information and the yellow fields require input when adding or modifying a component.

Generally there are four types of information:

Required	(type R)	Yellow
Recommended	(type C)	Blue
Optional	(type O)	White
Read-only		Gray

Fields with a **red label** has a special meaning. If you enter a value in this field, which was not yet defined, you will get the choice to create and use this value.

The button **[...]** on each screen will give you a detailed information of the object.

Use the **%** in front of a search string when you want to search for an occurrence of the string, when you are using the **like** option in the search function.

Plug-ins

Plug-ins are user-defined commands that will be executed with the parameters from the Configuration Database. You may use %AdminDir% or %ProgramDir% as relative path for the command. Common, User, Group and Application Substitutions could be used as parameter. The parameter to substitute, should be embedded between '{' and '}'. E.g. {UserName\$}. If a variable not could be evaluated, the program will ask for it.

Self Service Helpdesk

The Easy Manage Self Service Helpdesk gives the end-user the possibility to register and track his own calls. The helpdesk will not be disturbed by phone calls of end-users, but it could use their time to solve the calls.

To enable the Self service Helpdesk for your organization create a icon on the desktop of the user with the following URL:
`http://<EasyManage Web Server>[:<Portnumber>]/ezmanage/sshd.html`

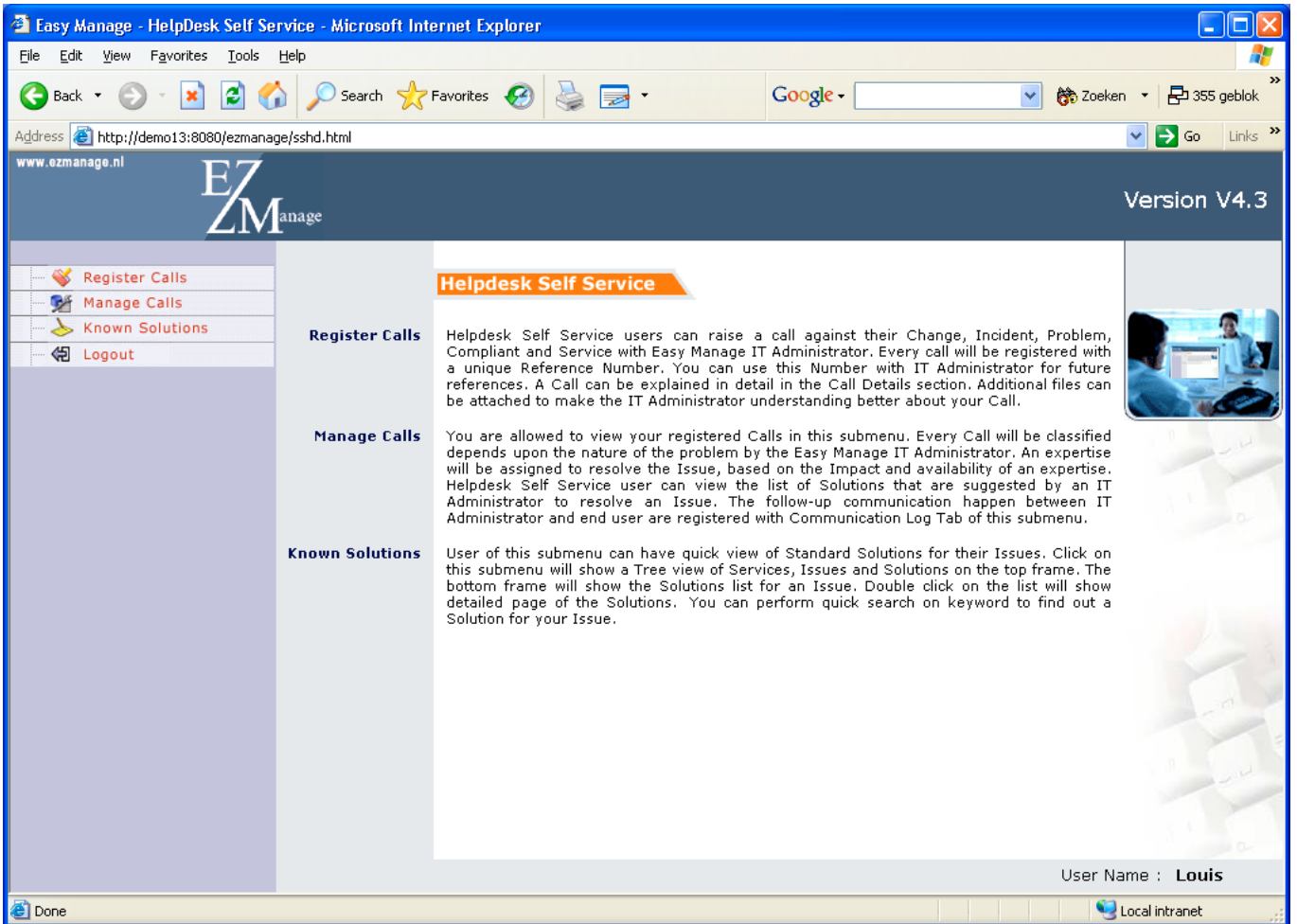
This will start the web enabled Self Service Helpdesk application.



Enter the username defined in the Easy Manage Configuration Management DataBase and click **Login**.

Main Menu

The Main Menu of the Self Service Helpdesk gives the user the possibility to select the task to do.



Register a Call

With this function you can register a call to the Helpdesk. You can attach files and enter some additional information of the call.

Register Call

Save Cancel

Customer Details

Full Name : Louis Mulder	Company : Easy Manage
Department : ICT	Location :

Call Details

Summary :

Details :

Communication Log

Attachments

Type	Subject	Summary

New Open

<i>Field/Tab</i>	<i>Description</i>
Summary	Enter a short summary of your call
Details	Enter the details of the call
Communication log	With this tab you can enter some additional information to the helpdesk. See the <u>Add/Show Communication log</u> function.
Attachments	With this tab you can attach one or more files to the call. See the <u>Add/Show Attachment</u> function.

Add/Show Communication log

With this function you can add or show the communication logs, which you have created are which were created by the helpdesk.

Communication Log

Save Cancel

Customer Details

Full Name : Louis Mulder	Company : Easy Manage
Department : ICT	Location :

Call Details

Summary :

Details :

Communication Log Details

Subject :

Summary :

<i>Field</i>	<i>Description</i>
Subject	Enter a subject of this communication log.
Summary	Enter the details of the communication log.

Add/Show Attachment

With this function you can add and show a file to a call. Use the Browse button to select the file to attach and click the **Save** button

Attachments

Save
Cancel

Customer Details

Full Name : Louis Mulder	Company : Easy Manage
Department : ICT	Location :

Call Details

Summary :

Details :

Attachment Details

File Name : Browse...

File Description :

<i>Field/Tab</i>	<i>Description</i>
<i>File Name</i>	Enter a filename to attach or use the browse button to select a file.
<i>File Description</i>	Enter the details of the attached file.

Manage Calls

With this function you can manage and track your own calls. It will give you a list of all your Open and Solved calls. When the helpdesk employee has accepted your call, he will work on the call by giving solution(s) for it to solve. You will see a signal, when the helpdesk employee has changed the contents of a call (There was some activity).

Call ID	Summary	Status	Date Created	Date Changed
21	Import/Export CMDB and Knowledge Database	Open	26/07/2004 9:41 PM	22/11/2004 10:48 PM
26	Move all machine directories to the Machines directory	Open	26/07/2004 9:45 PM	02/08/2004 10:16 PM
27	Automatic fill the database from the audit files	Open	26/07/2004 9:46 PM	20/11/2004 4:53 PM
31	Create a typeahead field	Open	28/07/2004 9:21 PM	18/10/2004 11:00 AM
40	Application dependency	Open	04/08/2004 6:15 PM	
138	Use the right button of the mouse to execute functions	Open	18/10/2004 10:25 AM	
237	Software -> Platforms -Open/New. Change the label Type into Name.	Open	11/01/2005 10:23 AM	11/01/2005 10:23 AM
238	Helpdesk setup-> Expertises. List only the expertise name instead of expertises with their assignees	Open	11/01/2005 10:45 AM	11/01/2005 10:46 AM
239	Helpdesk Setup->Services->Open/New->TAB General. Put the days and times on a groupbox named Service Window	Open	11/01/2005 10:47 AM	11/01/2005 10:47 AM
240	Configurations -> Workstations (etc). Make it possible that each configuration could be printed.	Open	11/01/2005 10:49 AM	11/01/2005 10:50 AM
241	The checkboxes in the print configuration should default become true instead of false.	Open	11/01/2005 10:51 AM	11/01/2005 10:51 AM
242	Configurations -> Objects -> Open-> Tab Hardware and Tab Software. List all Hardware(Devices) and All Software(Initial and Network)	Open	11/01/2005 10:55 AM	11/01/2005 12:49 PM
243	SSHD - Known Solutions. Rearrange the page that exactly the upper half is the tree and the lower half is the solution.	Open	11/01/2005 10:59 AM	11/01/2005 12:48 PM
244	Configurations -> Objects -> Open ->Tab General. The Name and description is not mandatory (Yellow) but advised (Blue)	Open	11/01/2005 11:13 AM	11/01/2005 12:48 PM
245	Helpdesk Setup- Issue Types -TabRelated Objects -> New. Show the Name of the issue instead of the Issue Code.	Open	11/01/2005 12:46 PM	11/01/2005 12:47 PM

Select a call and double click on it or click the **Open** button. This will start the Manage your Call function.

Manage your Call

With this function you can show the progress of a call and try the given solution. When the solution is acceptable, then the call will be closed.

Manage Calls

Save
Cancel

Customer Details

Full Name : Louis Mulder	Company : Easy Manage
Department : ICT	Location :

Call Details

Call ID : <input style="width: 90%;" type="text" value="44"/>	Call Type : <input style="width: 90%;" type="text" value="Change"/>
Summary : <input style="width: 98%;" type="text" value="Create a simple reportfunction of the calls, so that call could be printed with some selections"/>	
Details : <input style="width: 98%;" type="text" value="Create a simple reportfunction of the calls, so that call could be printed with some selections like:"/>	

Solutions | **Communication Log** | **Attachments** | **Planning**

Summary	Details	Status

Open

<i>Tab</i>	<i>Description</i>
<i>Solutions</i>	With this tab you can use a solution to solve the call. See the <u>Use the Solution</u> function.
<i>Communication log</i>	With this tab you can enter some additional information to the helpdesk. See the <u>Add/Show Communication log</u> function.
<i>Attachments</i>	With this tab you can attach one or more files to the call. See the <u>Add/Show Attachment</u> function.
<i>Planning</i>	With this tab you can see the planning for the call if it is categorized as a Change. See the <u>Show the Planning</u> function.

Use the Solution

With this function you can select from the solutions, that the helpdesk has suggested solving the call. If the Solution solves the call, then the status of the call will become “Solved”.

Solution

✕ Close

Customer Details

Full Name : Balanchander Subbiah	Company : Step Ahead Software Solutions
Department :	Location :

Call Details

Call ID : <input type="text" value="111"/>	Call Type : <input type="text" value="Incident"/>
Summary : <input type="text" value="Problem with my memory in my laptop"/>	
Details : <input style="height: 20px;" type="text" value="As i got blue screen when the system boot and says problem with physical memory i have registered with hp website and received the memory. I have to replace my defective memory with the new one"/>	

Solution Details

Summary : <input type="text" value="Reboot the machine"/>
Details : <input style="height: 20px;" type="text" value="Reboot the machine with Ctrl+Alt+Del"/>

Is the given solution resolves your problem?

Select **Yes**, if the solution solves your call
 Select **No**, if the solution did not solves your call.

Show the Planning

With this function, you can show the planning of a call, which has been registered as a change.

Manage Calls

Save Cancel

Customer Details

Full Name	: Louis Mulder	Company	: Easy Manage
Department	: ICT	Location	:

Call Details

Call ID	: 44	Call Type	: Change
Summary	: Create a simple reportfunction of the calls, so that call could be printed with some selections		
Details	: Create a simple reportfunction of the calls, so that call could be printed with some selections like: ▲ ▼		

Solutions | **Communication Log** | **Attachments** | **Planning**

Planned Release	: 4.3	Planned End Date	:
Planned Start Date	:	Actual End Date	:
Actual Start Date	:		

Known Solutions

With this function, you can search for a known solution in the Database

The screenshot displays the 'Known Solutions' interface. At the top right, there is a dark blue header with the text 'Known Solutions'. On the left side, there is a search bar labeled 'Search...' with a magnifying glass icon. Below the search bar is a navigation tree with the following structure:

- Desktop Support
 - Hardware Error
 - Mouse
 - Screen

Below the navigation tree, there is a yellow button with a close icon and the text 'Close'. The main content area shows the details of a known solution:

Summary : Mouse is moving

Symptom : The mouse is moving on the screen, without touching it.

Resolution Details : Disable the mousepad driver.

Click on the tree to find the solution of the problem.

The first level displays the services. The second level displays the issues and the third level displays the known solutions.

Easy Manage Helpdesk Program

Start the application with your browser by typing `http://<Easy Manage web server>[:connection port]/ezmanage` in the address field. The application will first look if the Java Runtime Environment was installed and if not it will download it and install. Then the .jar file is downloaded from the Easy Manage web server and asks you to certify the application. Click **always**, if you don't want this question each time you start the application.

EASY MANAGE, The ultimate network management tool. - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print

Address http://pluto/ezmanage/ Go Links

www.ezmanage.nl EZManage MulCom B.V. Version V4.3b

Easy Manage®

is the ultimate and complete ICT Network Management tool

- ▶ System and Configuration Management for LAN's, servers, workstations, telecom devices and users.
- ▶ Sophisticated, efficient, smooth and easy to use.
- ▶ Detailed Management Decision Support.

News
4/6/2005 6:28 PM
Official News

Asset Management
Change Management
Problem Management
Incident Management
Configuration Management
Control & Distribution Management

Username
Password

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www.ezmanage.nl

Designed and Developed by:
itw.ccsolutions.com

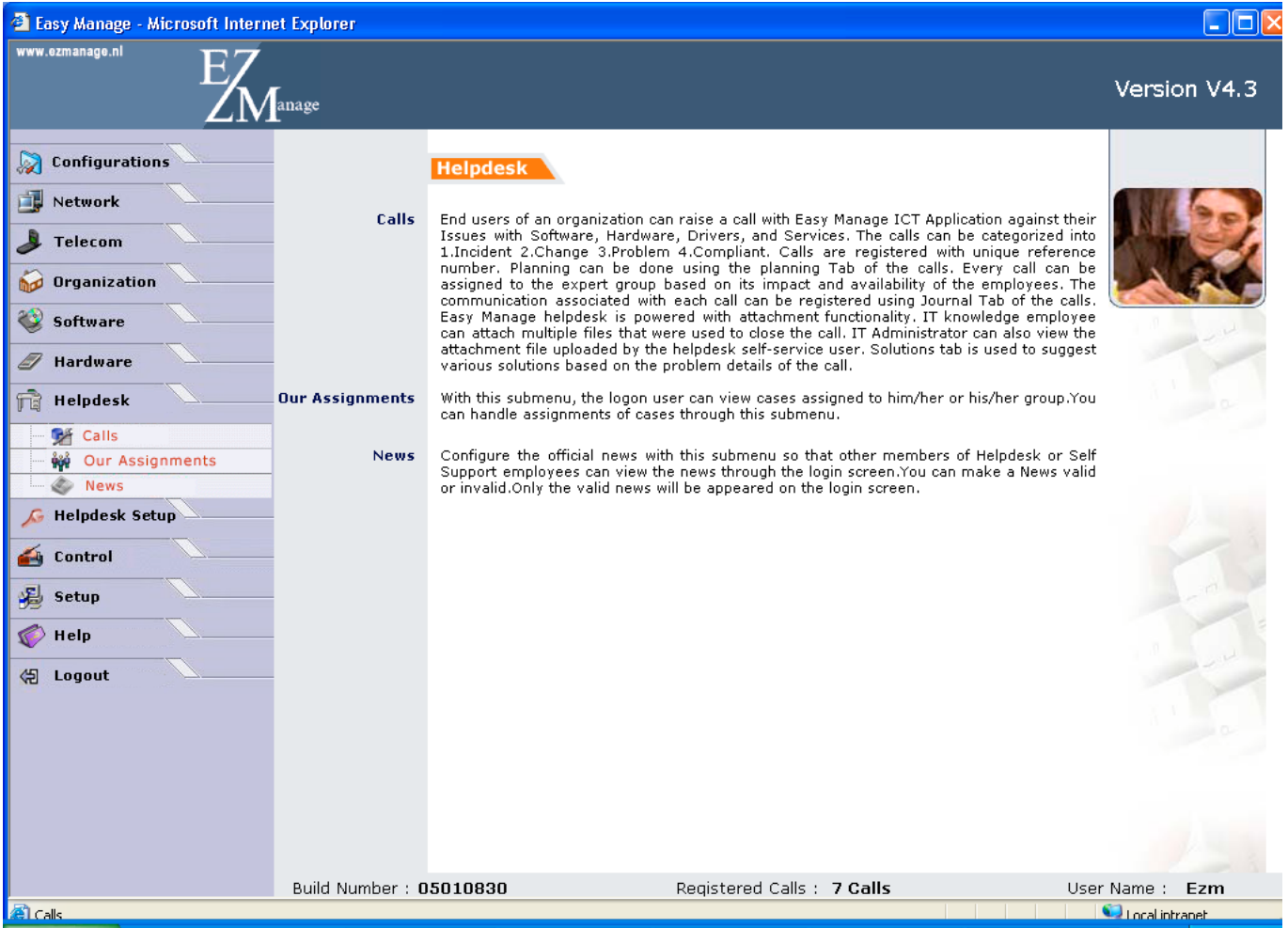
Applet Menu started Local intranet

Enter your username and password and click the **Login** button.

If you login for the first time, enter **ezm** as username and **ezm** as password.

Helpdesk Menu

With the Helpdesk Menu, you can maintain all calls.



Calls

Calls will be used to control all Incidents, Changes, Problems and Complaints in an ICT Environment.

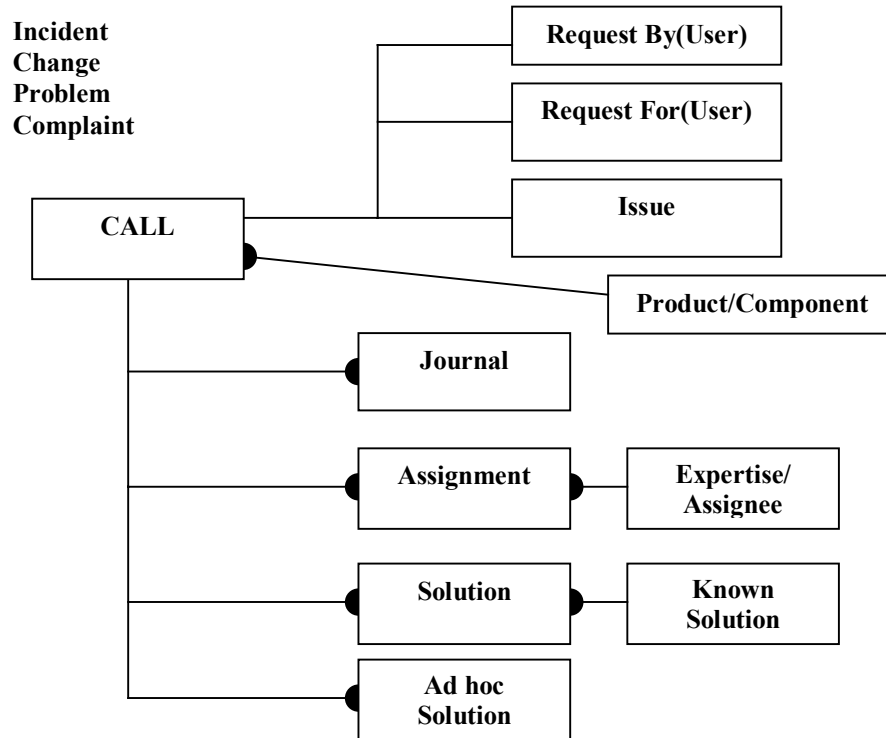
An Incident is an interruption or disruption of the quality of a service what you have promised to your users.

A Request for Change is a change in a managed service, which results in a modification in the CMDB. A Change should be planned to avoid the disruption of the quality of the promised services.

A problem is a situation, which was derived from a number of incidents with equal issue, or of a very important incident. The cause of a problem is unknown. When a solution for the problem is found, then it is a Known Error. A Known Error could create a Request for Change to remove the Known Error.

It is also important to handle a Complaint. A Complaint means that the way of service is not correct according the user. You have to take away this feeling at the user, so quality of service will increase.

The relation



Calls

New... Open... Delete Search... Sort... Report

Opened Calls Solved Calls Closed Calls

Call ▲	Call ...	Request By	Sub Status	Priority	Problem Su...	Created Date
138	Change	Louis Mulder	Classified	Medium	Use the right button o...	18/10/2004 10:25 ...
172	Change	Carlo van Leeuwen	Classified	High	Long-filenames are tr...	08/11/2004 09:25 PM
188	Change	Harold Espeldoorn	Classified	Low	Please add the possib...	24/11/2004 11:45 ...
21	Change	Louis Mulder	In Progress	Medium	Import/Export CMDB ...	26/07/2004 09:41 PM
211	Change	Louis Mulder	Classified	Low	Don't wait for an exte...	23/12/2004 09:54 PM
213	Change	Louis Mulder	Classified	Low	Helpdesk Setup -Serv...	23/12/2004 10:44 PM
225	Change	Louis Mulder	Registered	Low	Implement the first.u...	04/01/2005 10:46 PM
226	Change	Louis Mulder	Registered	Low	Implement the param...	04/01/2005 10:48 PM
227	Change	Louis Mulder	Registered	Low	Create user definable ...	04/01/2005 10:50 PM
228	Change	Louis Mulder	Registered	Low	Redefine the connecti...	04/01/2005 10:52 PM
229	Change	Louis Mulder	Registered	Low	Change the look and f...	04/01/2005 10:54 PM
230	Change	Louis Mulder	Registered	Low	The company name a...	04/01/2005 10:56 PM
231	Change	Louis Mulder	Registered	Medium	Enhance the helpdesk...	04/01/2005 10:58 PM
232	Change	Louis Mulder	Registered	Low	Helpdesk setup -> Ex...	10/01/2005 05:05 PM
233	Change	Louis Mulder	Registered	Low	Helpdesk Setup->Sol...	11/01/2005 10:04 ...
234	Change	Louis Mulder	Registered	Low	The field Assignee is ...	11/01/2005 10:10 ...
235	Change	Louis Mulder	Registered	Low	Organization -> Locat...	11/01/2005 10:15 ...

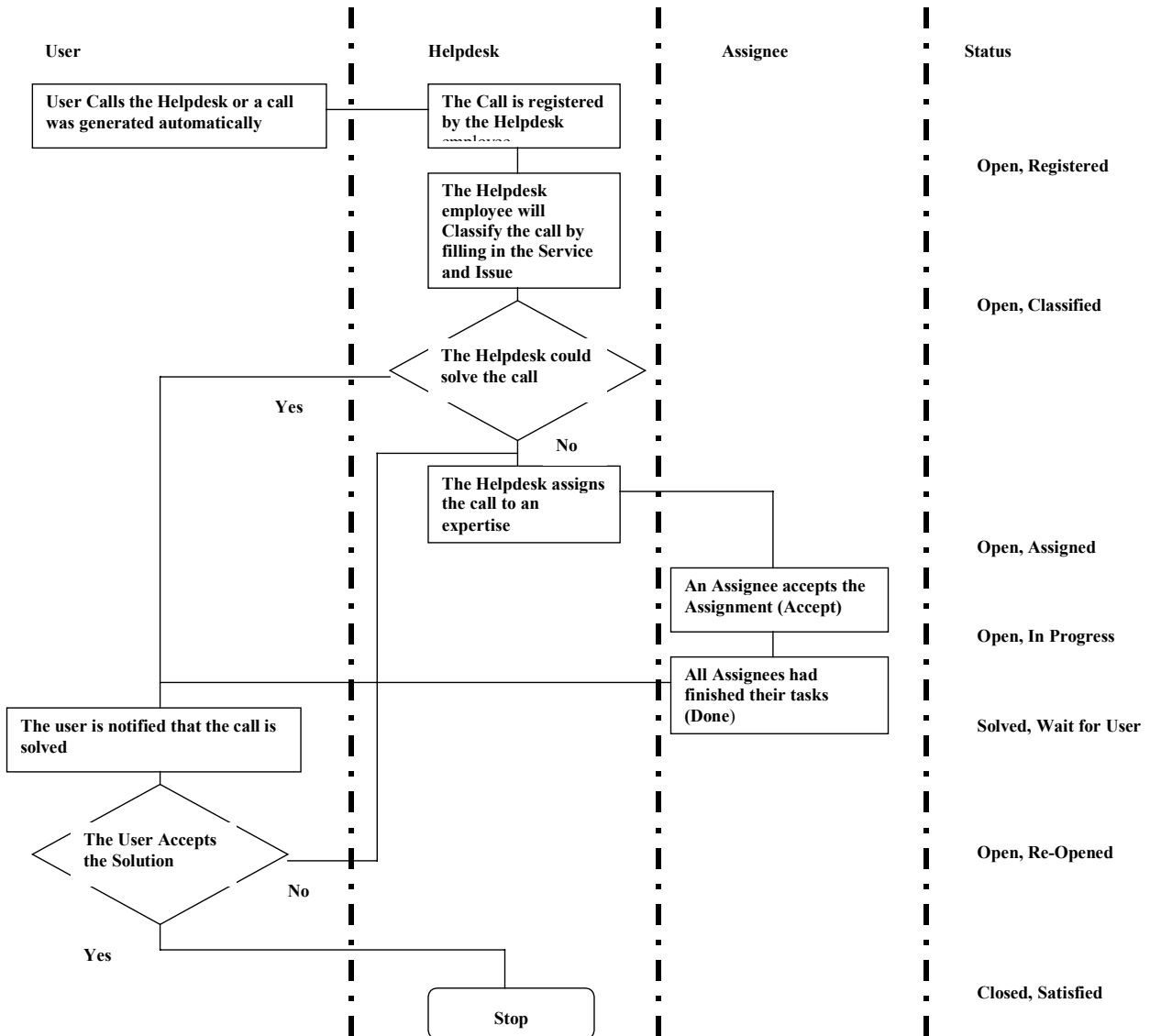
The list screen has a TAB for each status, so you can see in a quick way how many Open, Solved and Closed Calls there are waiting. You can create reports of the calls with all kinds of selection criteria.

Add/Modify Call

With this function you can register and maintain calls.

Easy Manage has the following default states for the status and sub status

Action	New Status	New Sub Status
<i>A new call is added</i>	Open	Registered
<i>A service and Issue type are filled in</i>	Open	Classified
<i>An assignment is added</i>	Open	Assigned
<i>An Assignment is accepted</i>	Open	In Progress
<i>The last assignment is marked as done</i>	Solved	Wait for User



Calls

Save Cancel Report New...

Call Call Type

	Phone	E-Mail	Department
Request by <input type="text" value="Louis Mulder"/>	0535742274	almulder@wxs.nl	ICT
Request for <input type="text" value="Louis Mulder"/>	0535742274	almulder@wxs.nl	ICT

Problem Summary

Problem Details

General
Planning
Solutions
Journals
Assignments
Attachments

Call Source	<input type="text" value="Phone"/>	Product ID	<input type="text"/>
Product category	<input type="text" value="None"/>	Component ID	<input type="text"/>
Component	<input type="text" value="None"/>	Sub Status	<input type="text" value="Assigned"/>
Status	<input type="text" value="Open"/>	Impact	<input type="text" value="Small"/>
Priority	<input type="text" value="Low"/>	Service	<input type="text" value="Easy Manage Web Development"/>
Issue Types	<input type="text" value="EZManage server"/>	Solution	<input style="height: 30px;" type="text"/>
Created By	<input type="text" value="ezm"/>	Date of creation	<input type="text" value="03/06/2005 11:00 PM"/>
Modified By	<input type="text" value="ezm"/>	Date of modification	<input type="text" value="03/06/2005 11:01 PM"/>

Field/Button	Description
Call	Shows the unique Call id. This Id is created when the call is created.
Call Type	Select the type of call. This could be Incident, Change, Complaint or Problem.
Request by	Select the caller of this call.
Request for	Select the user of this call.
Problem Summary	Enter a short description of the symptom of this call.
Problem Details	Enter the detailed information of this call.
Call Source	Select the source of this call.
Product Category	Select the product category.
Product ID	Select the product id according to the product category.
Component	Select the component type
Component ID	Select the component in the configuration. Only components of the selected configuration will be shown if a configuration is filled in. Otherwise all defined components are selectable.
Issue Type	Select the issue type for this call.
Status	Select the status of the call. The status could be Open, Solved, and Closed.
Sub Status	Select the sub status of the call. The sub status depends on the selected status.
Priority	Select the priority of the call. The priority could be Low, Middle and High.
Resolved by first contact	Enable this field, when the call is resolved by the first contact.

Impact	Select the impact of the call.
Solution	Enter the solution of the call. This field will be overwritten by the Summary of the solution, when the solution was accepted. (See Tab Solutions).

<i>Tab/Button</i>	<i>Description</i>
<i>Solutions</i>	See the <u>Add/Modify Solutions</u> function.
<i>Planning</i>	See the <u>Show/Modify Planning</u> function.
<i>Journals</i>	See the <u>Add/Modify Journals</u> function.
<i>Attachments</i>	See the <u>Attachments</u> function.
<i>Assignments</i>	See the <u>Add/Modify Assignments</u> function.
<i>Audit Trail</i>	This tab lists all changes that were made in the status of the call.

Show/Modify Planning

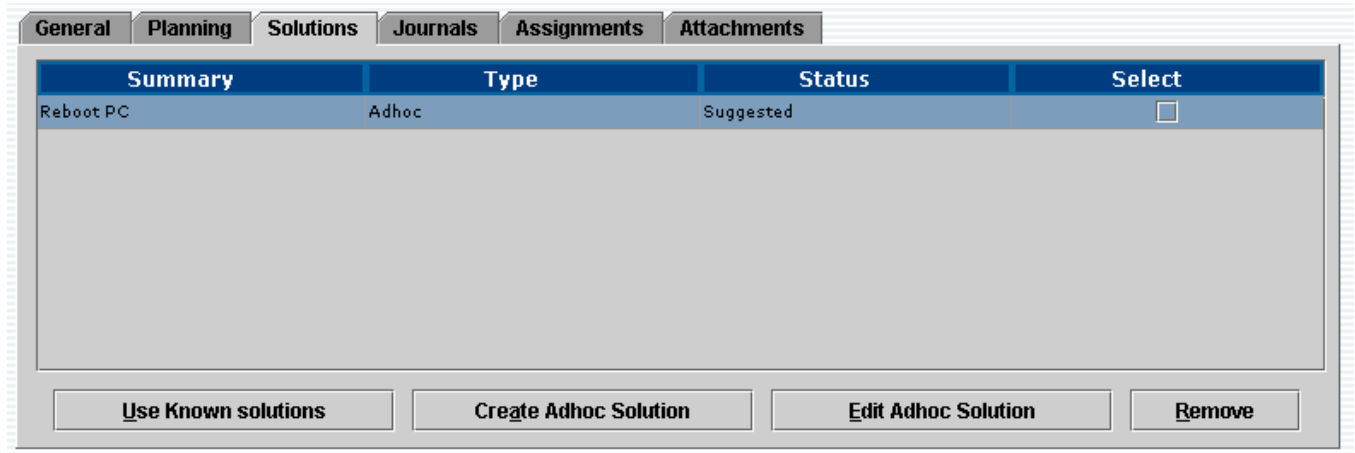
With this function you can show and modify the planning dates of the call. The user could see this planning with the Self Service Helpdesk. The function is only possible, when the Call Type is a “Change”.

General	Planning	Solutions	Journals	Assignments	Attachments
Planned Release	<input type="text" value="4.3"/>	Duration	<input type="text" value="0"/>	(min.)	
Planned Start Date	<input type="text" value="10/01/2005"/>		Planned End Date	<input type="text" value="22/01/2005"/>	
Actual Start Date	<input type="text"/>		Actual End Date	<input type="text"/>	

<i>Field/Button</i>	<i>Description</i>
<i>Planned Release</i>	Enter the planned release for this change.
<i>Planned Start Date</i>	Select the start date for this task.
<i>Planned End Date</i>	Select the end date for this task.
<i>Actual Start Date</i>	Select the actual start day, when you are starting this task.
<i>Actual End Date</i>	Select the actual end date, when you are finished with this task.

Add/Modify Solutions

With this function you can show the defined solutions of the request, add new and activate a solution. The Summary of the Solution is copied to the solution of the call, when the solution is activated. A solution could be linked to an issue. When that issue was selected in the call, then all linked solutions will be linked to the call.



<i>Button</i>	<i>Description</i>
<i>Use Known solutions</i>	Shows all solutions related to the selected issue, so you can select the solution(s) for this call.
<i>Create Ad hoc solution</i>	Start the function to create a Ad hoc solution
<i>Edit Ad hoc solution</i>	Edit a selected Ad hoc solution.
<i>Remove</i>	Remove a selected solution.
<i>Status</i>	Select the status of the solution.
<i>Select</i>	Activate a selected solution. . The Summary of the Solution is copied to the solution of the call.

Add/Modify Assignments

With this function you can reroute the call to an expertise group or an assignee assigned to the category of the call. Each assignment is a task that has to be done by an Expertise.

General

Summary	<input style="width: 95%;" type="text"/>		
Phase	<input style="width: 95%;" type="text" value="Plan"/>	Duration	<input style="width: 95%;" type="text"/> (in minutes)
Expert Group	<input style="width: 95%;" type="text" value="Easy Manage Developm..."/>	Assigned To	<input style="width: 95%;" type="text"/> ...
Accepted By	<input style="width: 95%;" type="text"/>	Accepted Date	<input style="width: 95%;" type="text"/>
Finished By	<input style="width: 95%;" type="text"/>	Finished Date	<input style="width: 95%;" type="text"/>
Planned Start Date	<input style="width: 95%;" type="text"/>	Planned End Date	<input style="width: 95%;" type="text"/>
Actual Start Date	<input style="width: 95%;" type="text"/>	Actual End Date	<input style="width: 95%;" type="text"/>
		<input type="button" value="Accept"/>	<input type="button" value="Done"/>
Created By	<input style="width: 95%;" type="text" value="ezm"/>	Date of creation	<input style="width: 95%;" type="text" value="08/04/2005 10:24 PM"/>
Modified By	<input style="width: 95%;" type="text"/>	Date of modification	<input style="width: 95%;" type="text"/>

<i>Field/Button</i>	<i>Description</i>
<i>Summary</i>	Enter the instructions, what the assignee should do for this call.
<i>Phase</i>	Select the phase for this assignment
<i>Duration</i>	Enter the duration of this assignment
<i>Expert Group</i>	Select the expertise group who should pick up this call. The call will be shown in the Tab My Group Assignments of the assignee, who was selected in the expertise group.
<i>Assigned To</i>	Select the assignee who should pick up this call. The call will be shown in the Tab My Assignments of the assignee.
<i>Accepted by</i>	Shows the assignee who has accepted the call.
<i>Accepted Date</i>	Shows the timestamp when the assignee has accepted the call.
<i>Finished by</i>	Shows the assignee who has finished the call.
<i>Finished Date</i>	Shows the timestamp when the assignee has finished the call.
<i>Planned Start Date</i>	Select the start date for this task.
<i>Planned End Date</i>	Select the end date for this task.
<i>Actual Start Date</i>	Select the actual start day, when you are starting this task.
<i>Actual End Date</i>	Select the actual end date, when you are finished with this task.
<i>Accept button</i>	Click this button, if you want to accept this call. The field Assigned To will be overruled with the current assignee.
<i>Done button</i>	Click this button, if you are finished with this call. The field Assigned To will be overruled with the current assignee and the assignment will be closed.

Add/Modify Journals

With this function you can create a Journal or Communication log. A Journal will be used to log each action, which was done on a call. A user can also create journals with the Self Service Helpdesk.

General

Type

Subject

Summary

Visibility

Created By

Modified By

Date Created

Date Modified

<i>Field</i>	<i>Description</i>
<i>Type</i>	Select a defined journal type.
<i>Visibility</i>	Select All if this journal should be visible for the caller in the Self Service Helpdesk. The selection could be Internal or All.
<i>Subject</i>	Enter a short description of the journal. This description will be shown to the user, if the Visibility is "All".
<i>Summary</i>	Enter the detailed description of the journal.

Attachments

With this function you can attach and view one or more files to a call or remove an attachment.

Calls

Save
 Cancel
 New...

Call
Call Type

Request by	<input type="text" value="balu"/>	...		Phone	E-Mail	Department
Request for	<input type="text" value="balu"/>	...				
Problem Summary	<input type="text" value="Problem with my memory in my laptop"/>					
Problem Details	<input type="text" value="As i got blue screen when the system boot and says problem with physical memory i have registered with hp website and received the memory. I have to replace my defective memory with the new one"/>					

General
Solutions
Journals
Assignments
Attachments
Audit Trail

File Name	Description	Time Stamp
memory module-hp.txt	Please find the attachment	07/09/2004 12:37 PM

Total

<i>Button</i>	<i>Description</i>
<i>New</i>	Add a new attachment and upload the file to UploadDir in the Knowledge Database.
<i>Modify</i>	Modify the selected attachment.
<i>Delete</i>	Delete the selected attachment and removes the attached file from UploadDir in the Knowledge Database.
<i>View</i>	Downloads the selected attachment and starts the associate program.

Add/Modify Attachment

With this function you can attach, view an attached file and modify the description of the attachment.

The screenshot shows a web form titled "Attachment". At the top, there are two buttons: "Save" (with a floppy disk icon) and "Cancel" (with a circular arrow icon). Below these is a "General" tab. The form contains the following fields and buttons:

- Attachment:** A text input field with an "Attach" button to its right.
- File Description:** A larger text input field below the "Attachment" field.
- Created By:** A text input field.
- Modified By:** A text input field.
- Date of creation:** A text input field.
- Date of modification:** A text input field.

<i>Fields/Buttons</i>	<i>Description</i>
<i>Attachment</i>	Shows the name of the original filename.
<i>File Description</i>	Enter the file description of the attached file
<i>Button Attach</i>	Starts a browse function to select and upload the file into the UploadDir in the Knowledge Database.
<i>[...]</i>	This button will download the attachment and start the associate program.

News

With this function you can list all defined news items, add a new, modify or remove one. A news item is a message, which could be displayed to the Easy Manage Admin program and the Self Service Helpdesk to notify the user about an event.

Add/Modify News

With this function you can add a new or modify the selected news item.

<i>Field</i>	<i>Description</i>
Subject	Enter the subject of the news item.
Valid	Enable this field, if you want to display this news item.
Time stamp	Enter the timestamp of this news item.
Long Description	Enter the long description of the news item.

Helpdesk Setup

With the Helpdesk Setup Menu, you can maintain all basic components, which will be used by the Helpdesk process..

Helpdesk Setup

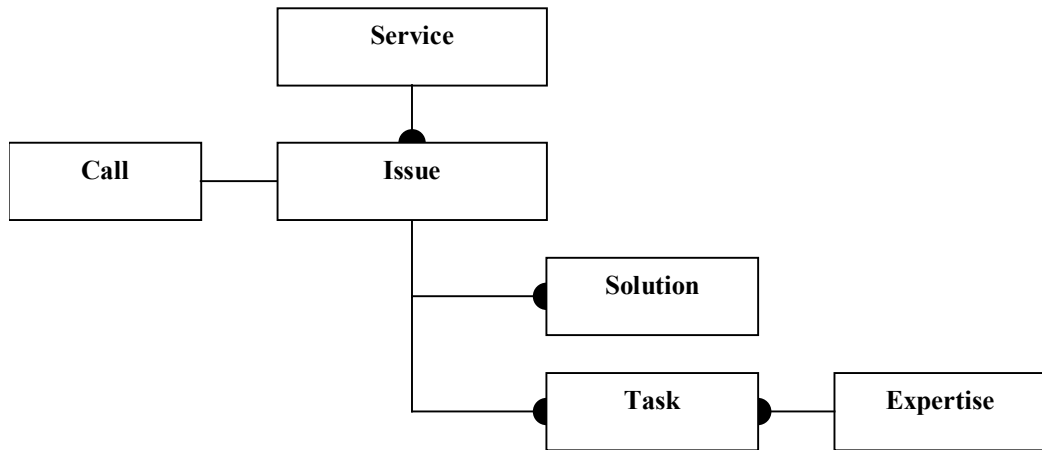
- Issue Types** With Issue Types, you can categorize different issues along with related objects that may cause a particular issue. You can provide solution to a particular issue with this submenu.
- Solutions** All standard solution types are handled with this submenu. You can add, modify or delete a solution and relate a solution to a Issue Type.
- Contracts** Allows to define the various contract policies followed in an organization. You can assign defined services to a contract.
- Services** Using this submenu, one can register a Service Agreement between supplier and customer. SA could be on the basis of Hardware, Software, Expertise and Issues.
- Expertises** With the Expertise's submenu you can list all defined Expertise's, add a new one, modify or remove one. You can assign FTE's and services to an expertise, so you will have an overview of all knowledge within your ICT Management organization. You can see if you can offer a service with the right people. The Helpdesk will use this to route a call to a FTE or an Expertise group if a request of a call is related to a service.
- Journal Types** Allows to define the various communication methods used in an organization. This defined Journal Type values are used as an input value in the Journal screen of Calls.
- Notifications** This submenu is used to define the notification configurations for e-mail. An automatic e-mail notification is sent to users when they raise a call, or to experts when they are assigned to or unassigned from a call, based on the values defined in this submenu. One can use fixed e-mail addresses or substitution values inserted through lookup screen or both. When more than one values are used, they are separated either by ,(comma) or by ; (semicolon).
- Adhoc Solutions** Using this submenu, convert an adhoc solution into known solution. Open a record and fill all mandatory fields, click on save button will convert an adhoc solution into known solution. A New Adhoc Solution can be created through Calls -> Solutions Tab.

Build Number : 05010830 Registered Calls : 7 Calls User Name : Ezm

Issue Types

With this function you can list all defined issue types, add a new one, modify or remove one. An issue type is a question, problem or change type. This issue type will be used by the Helpdesk to categorize the calls. An Issue type could have solutions, which will be used as workflow for the support employee. An issue could also have tasks, which results in automatically assignments to a call, when the issue was selected. A Service could have one or more issues.

The relations:



Add/Modify Issue Type

With this function you can add a new one, show or modify the selected Issue type and you can add, show or remove solutions to and from it. You can add, show and remove pre-defined tasks to and from it.

<i>Field</i>	<i>Description</i>
<i>Name</i>	Enter the name of this Issue type.
<i>Valid</i>	Enable this field if this Issue type is still selectable.
<i>Issue Code</i>	Enter the unique code of this Issue type.
<i>Default Priority</i>	Select the default priority for this Issue type. This value will be used in a call, when this issue was selected.
<i>Default Impact</i>	Select the default impact for this Issue type. This value will be used in a call, when this issue was selected.
<i>Comments</i>	Enter the comments for this Issue type.

<i>Tab</i>	<i>Description</i>
<i>Related Objects</i>	See the Related Objects function.
<i>Services</i>	With this tab, you can add, show and remove services to and from this Issue type.
<i>Tasks</i>	With this tab, you can add, show and remove tasks to and from this issue type. When this issue type is selected in a call, then all selected tasks will be created as assignment to the expertise group where this task was defined.
<i>Solutions</i>	With this tab, you can add, show and remove solutions to and from this issue type. When this issue type is selected in a call, then all selected solutions will be selected as solution.
<i>Calls</i>	This tab shows the related calls for this Issue type.

Related Objects

With this function you can categorize the issue type to an object.

The screenshot shows a web-based form titled "Related Objects". At the top left, there are two buttons: "Save" and "Cancel". Below these is a text input field labeled "Issue Name" with the value "Add new user on the network". A tab labeled "General" is selected, revealing several fields: "Object Type" (a dropdown menu with "Product" selected), "Object Value" (a dropdown menu with "Server" selected), and "Description" (a large empty text area). At the bottom of the form, there are four input fields: "Created By", "Modified By", "Date of creation", and "Date of modification".

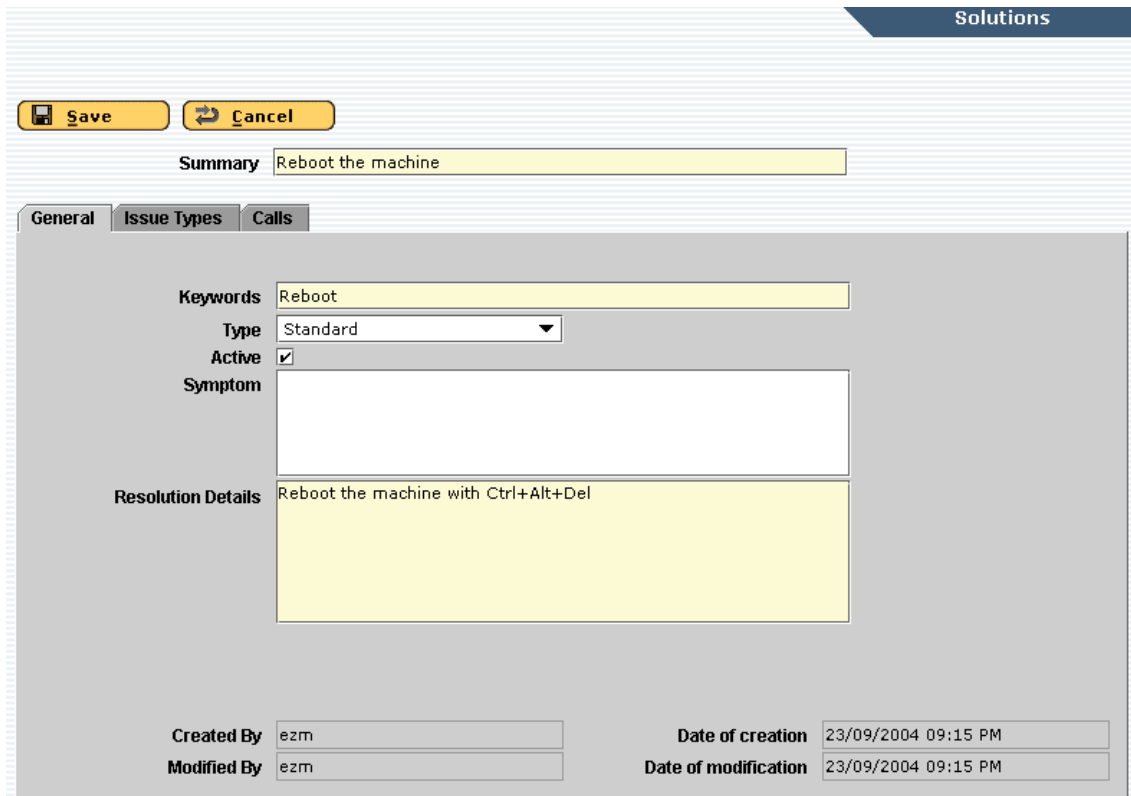
<i>Field</i>	<i>Description</i>
<i>Issue Code</i>	Shows the selected Issue Code.
<i>Object Type</i>	Select the pre-defined Object type
<i>Object Value</i>	Select the Object Value
<i>Description</i>	Enter the description of this Issue Type.

Solutions

With this function you can list all defined Solutions to an Issue type, add a new one, modify or remove one. A solution could be given by a support employee and is related to an Issue Type. One or more solutions could be created with a sequence and assigned to a call.

Add/Modify Solution

With this function you can add a new one, show or modify the selected solution and you will see at which calls this solution is used.



<i>Field</i>	<i>Description</i>
Summary	Enter the unique summary of the solution.
Keywords	Enter the keywords which could be used by the Self Service Helpdesk to find a solution.
Type	Select the Solution type. The type could be Standard, Workaround or Draft.
Active	Disable this field, if this solution should not be selected in a call.
Symptom	Enter the symptom of this solution.
Resolution Details	Enter the details of the resolution to solve this symptom.

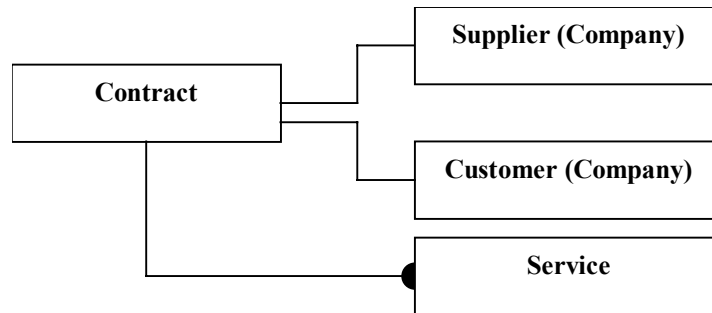
<i>Tab</i>	<i>Description</i>
Issue Types	With this tab you can add or remove Issue types to this solution. This solution will be linked to a call, when the issue type was selected in a call.
Calls	This tab shows all related calls, where this solution is used.

Contracts

With this function you can list all defined contracts, add a new one, modify or remove one. A supplier offers services to a customer. A contract is an agreement about a set of services between a customer and a supplier.

Only services, which belong to a contract, are selectable with an object.

The relations:



Add/Modify Contract

With this function you can add a new one, show or modify the selected contract. You can add and remove defined services to and from this contract.

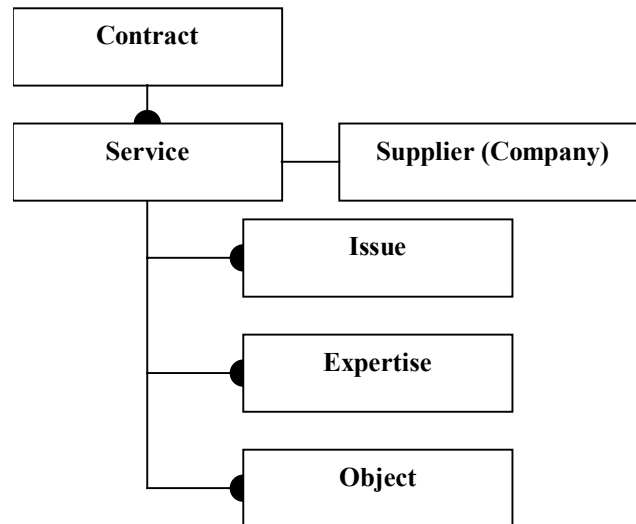
<i>Field</i>	<i>Description</i>
Name	Enter the unique name of the contract.
Description	Enter a description for this contract.
Customer	Select the customer of this contract.
Supplier	Select the supplier of this contract.
From Invoice Date	Enable this field if the contract is valid for all objects from its invoice. If this field is enabled, then the start date could not be filled in.
Start Date	Enter the start date of this contract.
Duration	Enter the duration in days of this contract.

<i>Tab</i>	<i>Description</i>
Services	With this tab you can list the defined services of the supplier, show, add or remove a service to or from this contract.

Services

With this function you can list all defined services, add a new one, modify or remove one. A supplier offers services to a customer. So you can define all services of a supplier and put them in a contract. A service has issues and a service will be valid for different kind of objects in your ICT infrastructure. An issue will be used by the Helpdesk to categorize the call. A service will be offered within a service window.

The relations:



Add/Modify Service

With this function you can add a new one, show or modify the selected service. You can add, show and remove Issue types, defined expertise's and objects to and from it.

The screenshot shows the 'Services' form with the following details:

- Buttons:** Save, Cancel
- Supplier:** Easy Manage
- Name:** User Management
- Tabs:** General, Objects, Expertises, Issue Types, Contracts, Calls
- Service Window Table:**

Day	Start Time	End Time
Monday	8:00	17:00
Tuesday	8:00	17:00
Wednesday	8:00	17:00
Thursday	8:00	17:00
Friday	8:00	17:00
Saturday		
Sunday		
- Quota (Min):** [Text Field]
- Exclusive:**
- Budget:**
- Tariff:** [Text Field]
- Note:** [Text Area]
- Created by:** ezm
- Created date:** 09/07/2004 09:41 PM
- Modified by:** [Text Field]
- Modified date:** [Text Field]

<i>Field</i>	<i>Description</i>
Supplier	Select the supplier of this service.
Name	Enter the unique name of the service.
Service Window	Enter the service window days and times of this service.
Quota	Enter the quota in minutes of this service.
Exclusive	Enable this field, if the cost of this service is based on usage.
Budget	Enable this field, if the cost of this service is calculated for a whole year.
Tariff	Enter the tariff for the use of this service.
Note	Additional information of the service.

<i>Tab</i>	<i>Description</i>
<i>Issue Types</i>	With this tab you can add, show and remove the Issue types, which will be handled by this service.
<i>Objects</i>	With this tab you can define the objects, which are valid for this service. See the Objects function.
<i>Expertises</i>	With this tab you can assign and de-assign expertise's to and from this service.
<i>Contracts</i>	With this tab you can show, add or remove the contracts where this service is valid.
<i>Configurations</i>	This tab will become visible when the predefined object types Workstation, Server, Printer and/or the user definable object types are added and specific was selected. With the tab Configurations you can add or remove the specific object types for which this service is valid.
<i>Hardware</i>	This tab will become visible when the predefined object types Adapters or Devices are added and specific was selected. With the tab you can add or remove the specific object types for which this service is valid.
<i>Software</i>	This tab will become visible when the predefined object types Application and/or Initial Software are added and specific was selected. With the tab Software you can add or remove the specific object types for which this service is valid.
<i>Calls</i>	With this tab you can see which calls are related to this service.

Objects

With the tab Objects, you can show, add and remove object types, which should be serviced for this service. The tab for the selected object type will be visible, if the object is enabled and **specific** is selected. When the specific is selected, then the Tab Services will also be visible on the forms where you maintain the specific object.

The screenshot shows a software interface for managing services. At the top right, there is a dark blue header with the word "Services". Below this, there are two yellow buttons: "Save" and "Cancel".

Below the buttons are two input fields: "Supplier" with the value "Easy Manage" and a dropdown arrow, and "Name" with the value "Easy Manage Client Development".

Below the input fields is a horizontal tab bar with the following tabs: "General", "Objects", "Expertises", "Issue Types", "Contracts", and "Calls". The "Objects" tab is currently selected.

The main area of the form is a table with two columns: "Name" and "Specific". The table has one row with the following data:

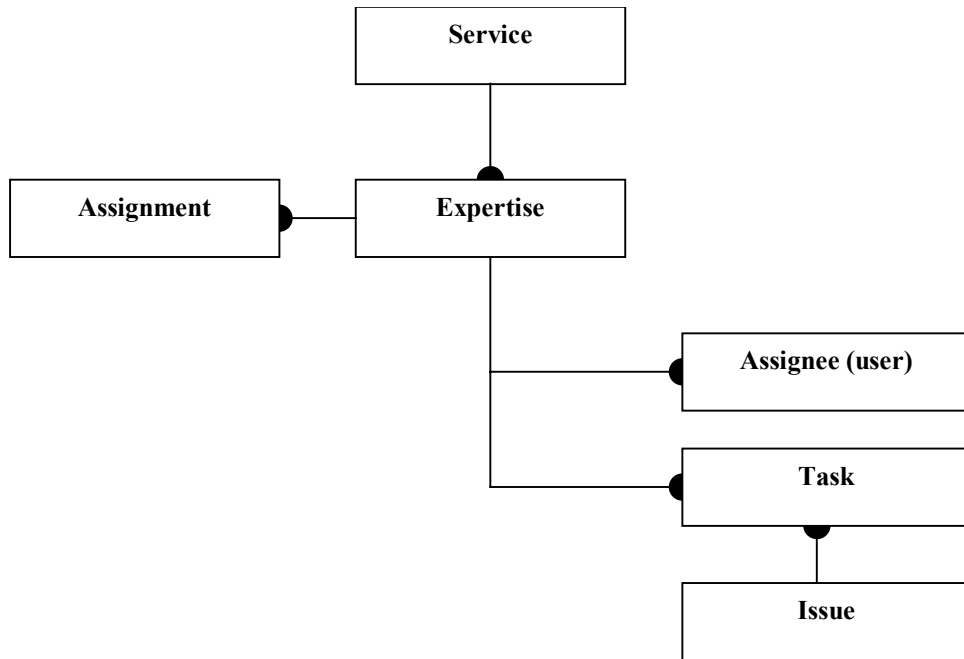
Name	Specific
Application	<input type="checkbox"/>

At the bottom of the form, there are two buttons: "Add" and "Remove".

Expertise's

With this function you can list all defined expertises, add a new one, modify or remove one. An expertise will be used to route a call (via an assignment) to a group of assignees, which will solve the call. You can add and remove assignees and tasks to an expertise. The assignee in an expertise who logs on in Easy Manage, could work on all calls which where assigned to that expertise group.

The Relations:



Add/Modify Expertise

With this function you can add a new one, show or modify the selected expertise. You can assign and de-assign Assignees to this expertise. You can show, add and remove tasks to this group.

<i>Field</i>	<i>Description</i>
Name	Enter the unique name of the expertise.
Note	Enter additional information about the expertise group.

<i>Tab</i>	<i>Description</i>
Assignees	With this tab, you can list the defined Assignees, add, change or remove the Assignee to this expertise. See the Add/Modify Assignee function.
Tasks	With this tab you can list the defined tasks, add or remove a task to or from this expertise.
Calls	This tab lists the calls where this expertise was used.
Services	This tab lists the services where this expertise was used.

Add/Modify Assignee

With this function you can show or change the responsibility sequence, skill level and cost data of the Assignee for this expertise.

Add Expertise

Save
Cancel

Expertise

User name

General

Sequence

Skill

Cost unit

Cost Quantity

<i>Field</i>	<i>Description</i>
<i>Expertise</i>	Shows the description of the expertise.
<i>User Name</i>	Shows the full name of the Assignee.
<i>Sequence</i>	Enter the sequence of responsibility for this expertise.
<i>Skill</i>	Select the skill level for this expertise.
<i>Cost Unit</i>	Enter the cost unit of this Assignee for this expertise.
<i>Cost Quantity</i>	Enter the cost quantity of this Assignee for this expertise.

Add/Modify Task

With this function you can show or change the task, which could be executed by this expertise. A task could be linked to an Issue type. All tasks linked to an issue will result in creating an assignment for the expertise of the task and the description of the task is copied to summary of the assignment.

The screenshot shows a web-based form for adding or modifying a task. At the top right, there is a dark blue tab labeled "Tasks". Below this, there are two yellow buttons: "Save" with a floppy disk icon and "Cancel" with a circular arrow icon. The "Name" field is a text input containing "Add user on the NTserver". Below the name field is a "General" tab. Under the "General" tab, there are three main sections: "Duration" with a text input containing "10" and the label "(in minutes)", "Description" with a large text area containing "Add the user with on the server with the procedure stored in the management folder.", and a metadata section at the bottom with "Created By" (ezm), "Date of creation" (06/01/2005 04:49 PM), "Modified By" (empty), and "Date of modification" (empty).

<i>Field</i>	<i>Description</i>
<i>Name</i>	Enter the name of the task.
<i>Duration</i>	Enter the duration for this task. The duration will be copied to the duration field of the assignment.
<i>Description</i>	Enter the description of this task. This description will be copied to the summary field of the assignment.

Notifications

With this function you can list all defined notifications, add a new, modify or remove one. A notification is a mail template that could be sent, when the status of a call, a Journal or an assignment is changed. A notification will be executed when the call was saved and the defined event was happened. You can use pre-defined substitution variables in all fields where the lookup button is declared. A substitution value is inserted at the position of the cursor. These substitutions will be resolved at execution time.

Add/Modify Notifications

With this function you can add a new or modify the selected Notification.

<i>Field</i>	<i>Description</i>
Name	Enter the unique name of the Notification.
Type	Select the type of the Notification. The type could be Call, Journal or Assignment.
Action	Select the Action of this notification. (Only the email is implemented at this time)
To	Enter the mail list where the notification should sent.
CC	Enter the mail list where the notification should sent as Carbon Copy.
BCC	Enter the mail list where the notification should sent Blind Carbon Copy.
From	Enter the mail address of the mailbox from where it was sent.
Subject	Enter the subject of the message.
Body Text	Enter the message

<i>Tab</i>	<i>Description</i>
Events	With this tab you can show, add, change or remove the events, which results to send this notification.

Notification Events

With this function you can list all defined notification events, add a new, modify or remove one. With a notification event you can define which notification has to be send, when a status of a Call, a Journal or an Assignment has changed. A notification event will be executed when the call was saved and the defined event was happened. It will send the linked Notification template.

Add/Modify Notification Event

With this function you can add a new or modify the selected notification event.

Notification Events

Save
 Cancel

Name

General

Notification

Status From

Status To

Created By

Modified By

Date of Creation

Date of Modification

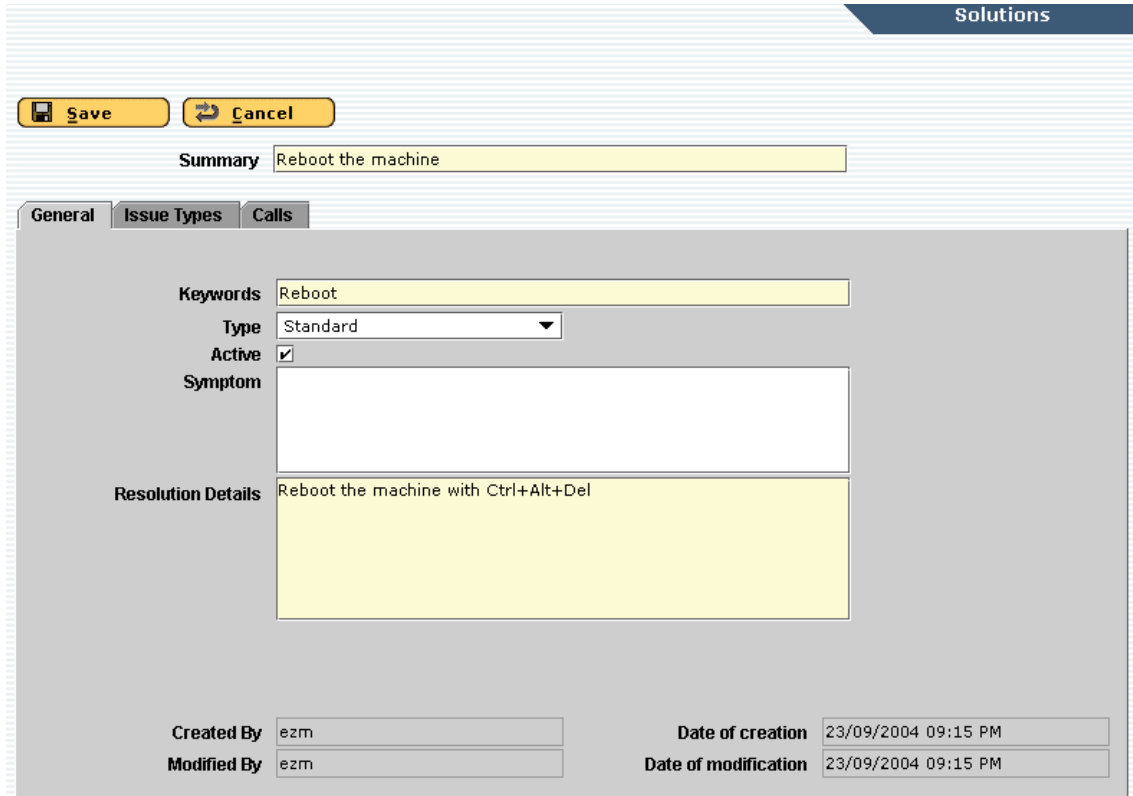
<i>Field</i>	<i>Description</i>
Name	Enter the unique name of the Notification Event.
Notification	Select the Notification that should be used, when the Status From was changed to Status To.
Status From	Select the status from. This is the status of the starting situation. The content of the status depends of the type of Notification.
Status To	Select the status to. This is the status of the saved situation. The content of the status depends of the type of Notification.

Ad hoc Solutions

With this function you can list all the ad hoc solutions and change it to an known solution. An ad hoc solution was created for an incident, when it was not yet present in the known solutions database.

Modify Ad hoc Solution

With this function you save an ad hoc solution to a known solution. You will see at which calls this solution is used.



<i>Field</i>	<i>Description</i>
Summary	Enter the unique summary of the solution.
Keywords	Enter the keywords, which could be used by the Self Service Helpdesk to find a solution.
Type	Select the Solution type. The type could be Standard, Workaround or Draft.
Active	Disable this field, if this solution should not be selected in a call.
Symptom	Enter the symptom of this solution.
Resolution Details	Enter the details of the resolution to solve this symptom.

<i>Tab</i>	<i>Description</i>
Issue Types	With this tab you can add or remove Issue types to this solution. This solution will be linked to a call, when the issue type was selected in a call.
Calls	This tab shows all related calls, where this solution is used.