

simple SUPPORT DESK

A Help Desk Application for The Rest Of Us

**Easily track, report, and
manage problem tickets
in a graphical multi-user
relational database
environment.**

Welcome to Simple Support Desk (SSD)

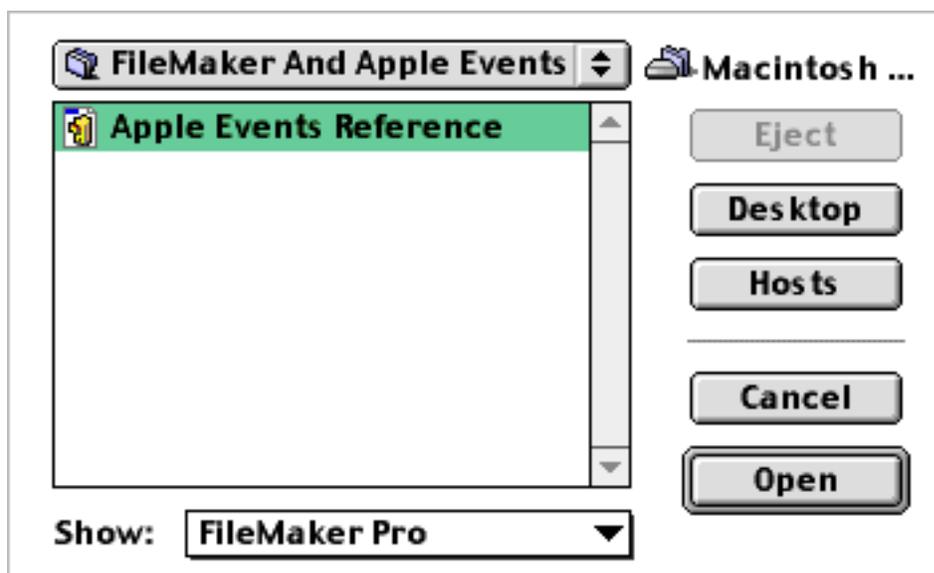
SSD is designed to capture information for problem tracking and problem resolution while keeping the entry of this data lightning fast. It is suitable for education/corporate help desks and commercial software companies' technical support lines. Users of the system include call takers, managers, end users, and support personnel.

The problem number is the key to a call or incident. The unique number is generated by the system when the call is first logged. Date, time and the user who opened the call are captured when the problem is opened. An unlimited number of 'action' records is recorded during the life of a problem. Actions are normally entered by support or quality assurance personnel.

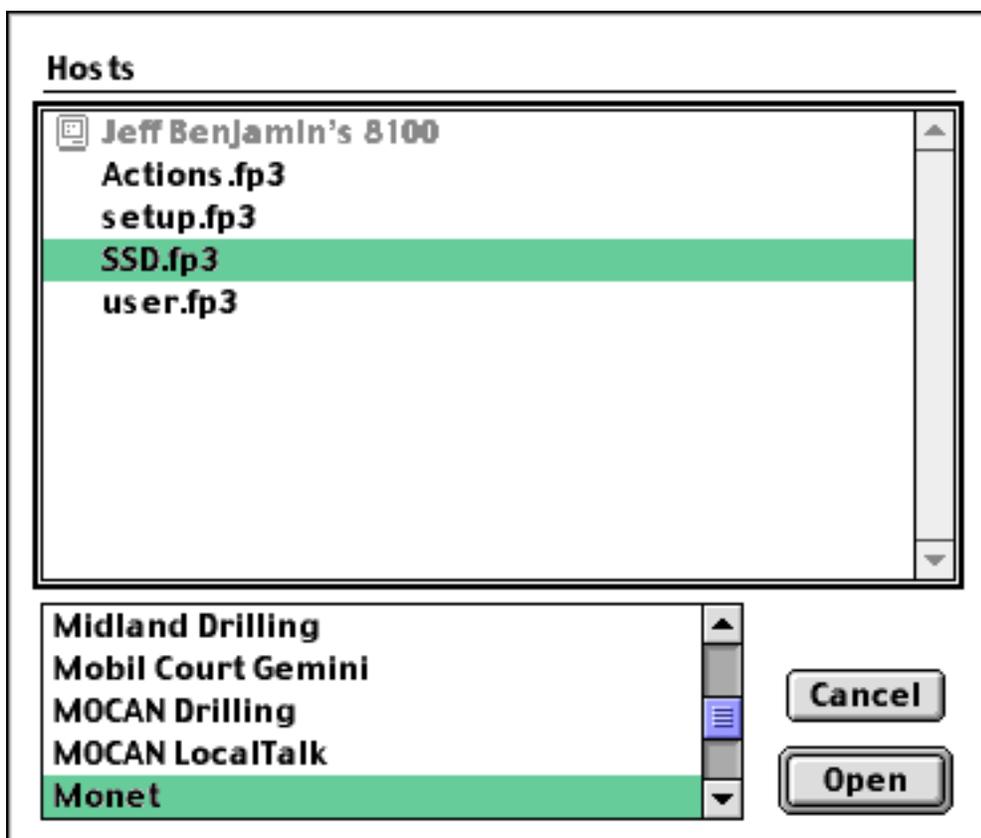
The system administrator of Simple Support Desk plays a significant role in the setup, use and maintenance of the system. The administrator provides user id's and passwords, sets up the original value lists for data entry popup menus, determines field names and determines the naming formula for problem numbers. (See the SSD System Administrator Manual for details.)

Opening SSD

If used in a multi-user environment, open the FileMaker Pro application and select 'Open...' in the File menu.

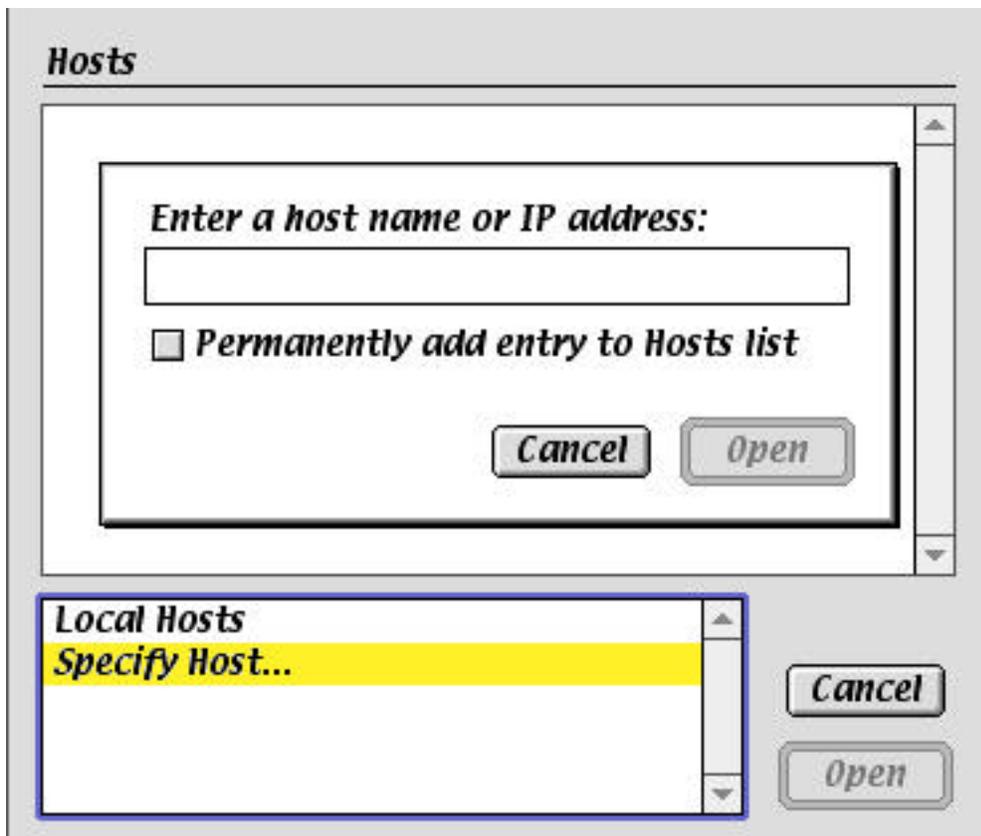


Click 'Hosts'. SSD can be used in an Appletalk or TCP/IP network. If the hosts button is clicked with Appletalk as the chosen protocol (selected in FileMaker's preferences), the following hosts dialog is displayed:



Select the Zone in which the system is hosted, then double-click 'SSD.fp3'.

If you are using TCP/IP for multi-user access, the following hosts dialog is displayed:



Enter the IP address of your server and click the Open button.

You then enter your name and password as supplied to you by your system administrator.

Data Entry

Once logged on, users with data entry access see the data entry screen. The buttons at the top of the screen provide the most common functions for data entry personnel:

- View As Form - disabled because it displays the data entry layout
- View As List - displays a columnar layout of all records in the found set.
- Reports - displays a layout with choices for report generation
- New Record - creates a new blank problem record ready for data entry
- Delete Record - deletes the displayed problem
- Find Record - changes to Find mode (for searching the problem database)
- Print Record - prints the current problem
- Info - displays information about SSD and its developer
- Close - closes the system



When a new problem is to be recorded, click the 'New Record' button. A blank record will be created in the database with a unique problem number.

Problem Summary

Problem #: JRB19970130002

Your name, the date, and time will be automatically permanently recorded for this problem.

Records Total: 833				Found: 11	
Entered:	Benjamin, Jeff	1/30/97	2:48 PM		
Closed					

Enter the end user's first and last name in the fields in the user box. If the user

has called before, you may also click the face icon to display a list of current users. After the name is entered, if the user has called before, verify his contact information for accuracy. If the user record needs updating, click **Modify User**. If the user has not called before, click **Add User**.

Modify User

User	Peggy Trigg
Phone	2938
Location	13a23
CPU Type	
Default Priority	
Email Address	User-defined1

Back

To see a list of this user's previous problems, click **History**.

User **Modify User**

Jeff Benjamin	
Phone	Location
User-defined1	Email Address
	support@stepupsoftware
CPU	

History

User Call History			Date Entered		Date Modified	
			7/24/96	3:52 PM	9/19/96	1:30 PM
User	Phone	Location				
Peggy Trigg	2938	13a23				
Date	Time	Problem *	Status	Description		
5/30/96	14:18	19960530001	Closed	Needs Public Folders address group set		
6/27/96	15:42	19960627001	Closed	Put a doc on the Drilling news server.		
7/15/96	7:31	19960715001	Closed	"Maybe you should get rid of MOI users		
7/15/96	7:59	19960715001	Closed			
7/22/96	8:28	JRB19960722001	Closed	Mike Krall is not getting MPN drilling		
7/26/96	10:10	JRB19960726001	Closed	Asked me to find out about a		
7/26/96	10:32	19960726001	Closed	Peggy will find the correct name,		
7/26/96	13:18	JRB19960726001	Closed	Needs help entering a fax qm address.		

The Status box displays the problem's current status, priority, category, and data defined by your system administrator (displayed here as 'User-defined2'). The status value choices are defined by your system administrator. The initial status is also defined by your system administrator. The status can be updated at any time. However, the final status (i.e. 'Closed') requires a button click confirmation and again the user name, date and time are permanently recorded.

Status	Priority	<input type="checkbox"/> FAQ
Open	2-Medium	
Target Date		
User-defined2		
Category		
User Defined1		

Target date is for reference - to help manage workloads. The FAQ checkbox is to identify a problem as a 'Frequently Asked Question.' If a record is a FAQ, its description and resolution become available to users of the system labelled as 'FAQ-only' in their user setup.

The description field is where the problem is described by the end-user, with additional notes added by the call taker.

The Resolution should be entered after all actions are complete and the problem is confirmed resolved with the end user. After a problem is resolved completely, the SSD data entry user should click  to complete this record.

Actions should be entered whenever there is activity relating to this problem after the initial call. To begin a new action record, click in the next available Action text field and begin typing. The other data on the line (date, time, entered by, and status) will be recorded automatically. To view the full text of an existing action record, click in the text field. It will expand as necessary.

Date	Time	Entered By	Status	Action
1/30/97	15:02	Benjamin, Jeff	Closed	this line will expand when the text wraps or when you type return

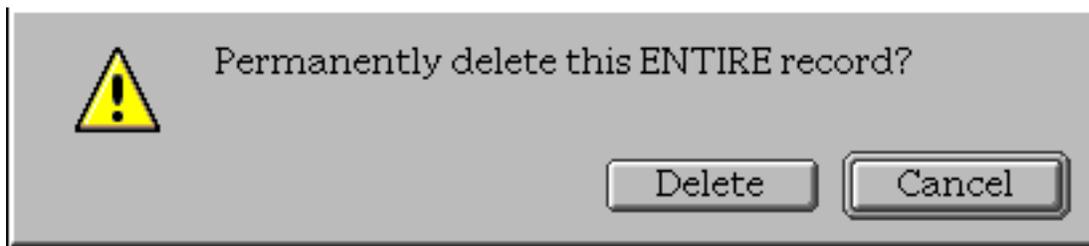
To view a list of the problem records in the current found set, click on the button at the top of the window named 'View As List.' The records may be in no particular order when first displayed. To sort the records by Date, User, or Status, click the bar chart icon next to those field labels. If you wish to form your own sort criteria, select 'Sort...' in the Mode menu. To view the detail for a specific problem record, click the 'View as Form' small icon to the left of the record.

	Date	User	Status	Records Found: 11
	1/27/97	Randy Rudolf	Closed	Can't get the MaxFax installer to

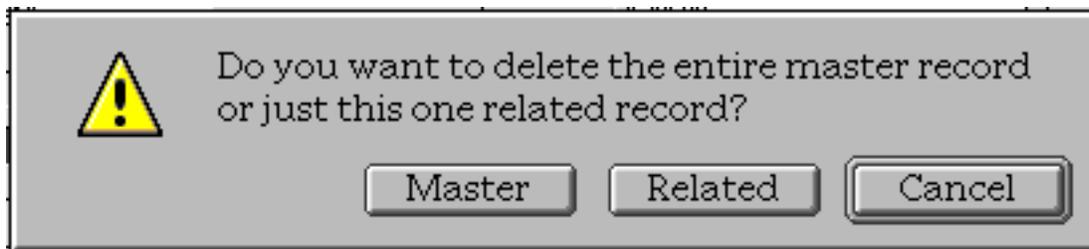
To Find problem records and to create the current found set, click the Find button at the top of the data entry window. Enter the criteria for your find, then click 'Find'.



To delete a problem and all its action records, click the Delete button at the top of the data entry window. Click Delete to confirm.



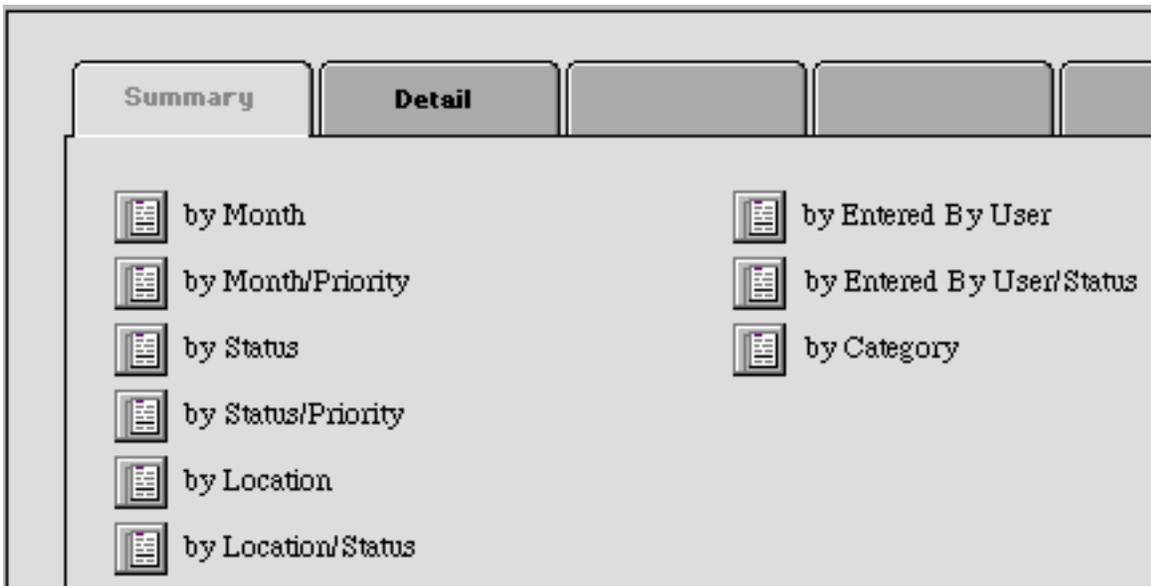
To delete an action record, click in the text field of the record, then click the Delete button at the top of the data entry window. Click Related to confirm.



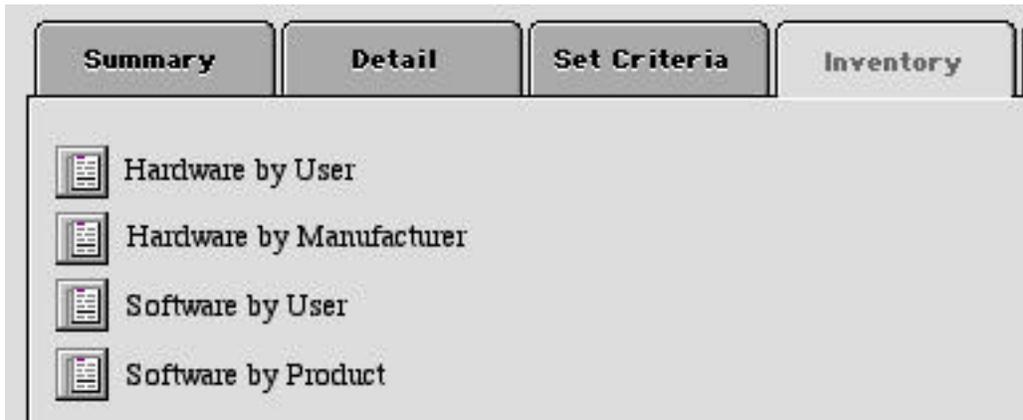
Inventory Data Entry

Reports

To view and print reports for the current found set (records found in the most recent find), click the Reports button at the top of the data entry window. Each button displayed represents a different sort/summary report which can be produced using data in the current found set. For detail reports, click



SSD produces inventory reports by User or manufacturer/product:



Troubleshooting

If you see a window like:



You should probably select 'Hide Window' in the Window menu and see your SSD administrator if you experience other problems.