

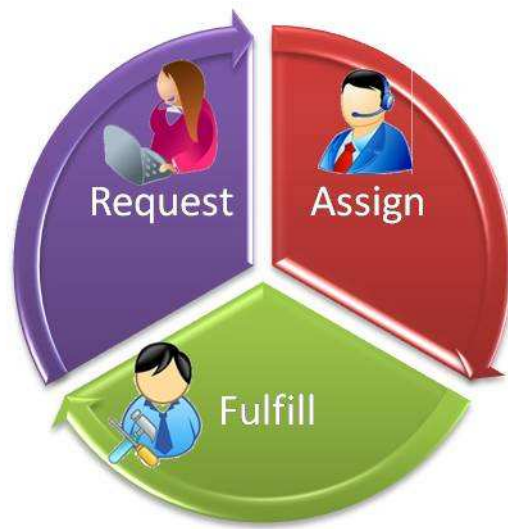
CCS HelpDesk 4.2 Screen Shot Tour

Welcome to the screen shot tour of CCS HelpDesk 4.2. In this tour we will lead you through a support process and during the process identify the new features of CCS HelpDesk 4.2. Overall you will notice intuitive screen design, with many more functions available. Also, the application makes use of Outlook functions including calendar and task functionality. This screen tour shows tickets being submitted in Outlook forms but ticket may also be submitted via a web interface (which looks very much like the Outlook forms) or by email which can be converted to tickets using email converter feature.

The Process

The request process consists of three activities:

1. A New Request (new ticket) is created by the end-user or help desk staff
2. The ticket is received by the help desk and assigned (assign form)
3. The request is fulfilled by the help desk staff or technician (assignee form).



CCS HelpDesk folders

CCS HelpDesk resides in your public folders. Tickets are stored in folders based on their status.

- New Tickets in Help Desk
 - Assigned Ticket in Assigned Tickets
 - Completed Tickets in ...
- Setup and configuration is done from various utilities in the Utilities folder.
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New Ticket - End User

The End-user can open a new ticket from within Outlook by selecting a tool bar button. At that point the New Ticket form appears:

New Help Desk Ticket

Help Desk Ticket

Trial Version

Summary

Need new laptop

Name: Darrell Trimble Email: dtrimble@crowcanyon.com Company: Crow Canyon Systems, Inc. Dept: Sales Office: Danville Phone: _____ Additional Contact <input type="checkbox"/> Include in updates Name: _____ Email: _____	Category Hardware Request Type Desktop Computer _____ Approver <input type="checkbox"/> _____ <input type="button" value="Submit"/>	Priority 3-Routine Date needed None OS _____
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Contact Info pulled from Active Directory

Drop down lists defined by you

Approver is optional based on Type of Request. If selected, ticket is routed thru email for approval first

Details/Attachments

(please provide detailed information)

Please Fill out the following Requisition form



pc_request.pdf

Computer Request Form

This form should only be placed in mailer and not email because for some reason email to do so will need some authorization. Please complete this form and send it to help@crowcanyon.com

Name: _____ Dept: _____
 Branch: _____ Phone: _____
 Office Address: _____
 Organization Name: _____
 Printer: High Medium Low
 Type of Computer

Optional Template loaded based on Type of Request with links to relevant forms etc.

Field customization. You can hide fields using the field manager utility. Also you can define which fields are required to be filled in before it can be submitted.

Automatic Reply to user when ticket is submitted. The user gets response immediately that the ticket has been received. Each ticket is given a Case number that the user can use when referring to a ticket

Additional Contact name and email - A second contact for the ticket can be designated in the Additional Contact Name and Email address fields. This can be a manager, a co-worker, vendor or other interested party. A checkbox gives you the option to include this contact in updates to the end-user.

Assign Ticket - Help Desk Staff

The ticket will appear in the Help Desk folder for review by the Help Desk Staff. From this form it may be assigned or resolved immediately.

Help Desk Ticket Trial Version

Approved by Darrell Trimble at 12/28/2008 10:14:00 PM

Summary

Need new laptop


<p>Priority: 3-Routine Due date: None Category: Hardware Request Type: Desktop Project: <input type="text"/></p> <p>Computer: <input type="text"/> OS: <input type="text"/></p> <p>Field 1: <input type="text"/> Field 2: <input type="text"/> Field 3: <input type="text"/> Field 4: <input type="text"/></p> <p>Case ID: 458-229-885 Date received: Sun 12/28/2008 10:09 PM Created by: Darrell Trimble</p>	OR	<p>Quick Resolution</p> <p>Time spent 0 h 0 m</p> <p><input type="button" value="Ticket Completed"/></p>	<p>Assign Ticket to: Other(s) Self</p> <p><input type="text"/></p> <p><input type="checkbox"/> If multiple assignees, make separate ticket for each one.</p> <p><input type="button" value="Assign Ticket"/></p>
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Contact Information

<p>Name: Darrell Trimble Email: dtrimble@crowcanyon.com Company: Crow Canyon Systems, Inc. Dept: Sales Office: Danville Phone: <input type="text"/></p> <p><input type="button" value="Select"/> <input type="button" value="Self"/></p>	<p>Additional Contact</p> <p><input type="checkbox"/> Include in updates</p> <p>Name: <input type="text"/> Email: <input type="text"/></p> <p><input type="button" value="Select"/> <input type="button" value="Self"/></p>
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Description and Attachments

Please Fill out the following Requisition form



Link tickets together by Project name

Customizable fields can be defined or hidden in List Manager

Quick Resolution - Some tickets can be resolved and closed immediately. For these, CCS HelpDesk 4.2 has a "Quick Resolution" button that assigns, moves and closes the ticket all at once. With Quick Resolution, the ticket is kept in the database for reference and recording, but it is marked Complete right away. This gives you a quick and easy way to immediately resolve tickets.

Ticket Assignment by Designated Staff only - only designated staff can assign tickets. This is setup in the license manager. Users do not have access to the ticket assignment pages and cannot assign tickets.

Task Splitter -- One ticket can be split into multiple tasks. Sometimes, one ticket requires multiple staffers to work on parts of it separately. It could be a ticket to upgrade a company with three locations, for example. One ticket is created, but you could split the ticket up when assigning it so that each site has a separate task to complete.

Once assigned, base on notification settings an email is sent to the end-user (requester) and the assigned staff person.

Assigned Ticket—Help Desk Staff or Technician

The assigned screen provides a focal point for accessing information to resolve the ticket or request. The technician or staff person can access hardware and software information (with Network Inventory), a knowledge base, as well as the Outlook Calendar and Outlook Tasks for setting appointments and adding to task lists. The work log is the central point of recording resolution information. Tabs provide more information and direct access to the knowledge base. As I all the forms fields can be required or hidden.

The screenshot displays the 'Assigned Ticket' interface. The 'General' tab is active, showing fields for Name (Darrell Trimble), Email (dtrimble@crowcanyon.com), Company (Crow Canyon Systems, Inc.), Dept (Sales), Office (Danville), and Phone. The 'Assigned to' field is set to Scott Restivo. The 'Date assigned' is Sun 12/28/2008 10:16 PM. The 'Priority' is 3-Routine, 'Status' is Not Started, 'Start Date' is None, and 'Due Date' is None. The 'Category' is Hardware Request, 'Type' is Desktop, and 'Computer' and 'OS' fields are empty. The 'Work Log' section shows three entries: a user comment from Scott Restivo at 10:26:31 PM, another user comment from Scott Restivo at 10:22:22 PM, and a system message at 10:08:45 PM. The 'Resolution' section is currently empty.

Work Log—is the place where work done to resolve the ticket is recorded. It automatically adds a date and time stamp and the person making the entry. Options include making the entry private (not displayable outside the IT staff), or sending an entry note to the end user.

Time Keeping - CCS HelpDesk allows you to track the time spent on each ticket. Current task time is added to total work from each staff person working on the ticket. Also elapsed time since the ticket was submitted is tracked.

Create Appointment (links to Outlook Calendar) – tech support staff can schedule appointments with the click of a button from this form. This connects them with the Outlook Calendar and automatically brings in the end-user email address and themselves to speed appointment setup. Great if you have to schedule time to fix, update or take a machine offline.

Reassign Ticket - The ticket can be reassigned at any time, which is useful in tasks that require serial steps by different staff.

Assigned Ticket—Detail Tab

The Detail Tab provides additional information for project management info, elapsed time, and custom field info.

Details

Project

Billing info Sales dept acct 101

Elapsed time Update

Related tickets Display

(enter IDs separated by commas)

Vendor Case No. 10242752

Ticket source Enduser

Ticket created by Darrell Trimble

Field 1

Field 2

Field 3

Field 4

New Log Entry

Add as is Add/Send to user Add as [Internal] Add as from: Scott Restivo

Work Log % Complete 0% Current Work 0 h 0 m Total Work 0 h 0 m

[USER COMMENT] 12/28/2008 10:26:31 PM: Scott Restivo - Ordered from Dell corporate account, ref # 10242752, should arrive in 3 days.

[USER COMMENT] 12/28/2008 10:22:22 PM: Scott Restivo - reviewing software application requirements

[SYSTEM] 12/28/2008 10:08:45 PM: TICKET RECEIVED - Approved by Darrell Trimble at 12/28/2008 10:14:00 PM

Resolution Cause: Complete Completed: None

Project / Time Tracking - Elapsed time from ticket submission can be updated, and other tickets linked to the project.

Vendor case information can be added if for instance you are working with a hardware or software vendor to resolve an issue.

Four Custom Fields - CCS HelpDesk 4.2 includes four custom fields that you can use for the specific needs of your company. These include two drop-down lists and two text boxes. The names of the fields and the contents of the drop-down lists can be changed using List Manager, giving you full flexibility on how you want to use and name these fields.

Assigned Ticket - Asset/Data Tab

If you purchase CCS Network Inventory with CCS HelpDesk, you will see the Asset Tab. Hardware and software inventory information is brought right into the ticket for the computer named or automatically brought in based on the end-user information.

The screenshot displays the CCS HelpDesk interface for an assigned ticket. The interface is divided into several sections:

- General:** Device type: Computer, Name: NEMO, IP address: 192.168.2.33, OS: Windows XP, Model/maker: Compaq Presario 061 D1, Asset no.: 105.
- Details:** Retrieve details: Basic, Disk, Apps, Hotfixes. (Buttons above used with Network Inventory link)
- Asset Info:** Active@ UNDELETE DEMO, Adobe Acrobat 4.0, Adobe Captivate 2, Adobe Photoshop Album Starter Edition, Adobe Reader 8, Adobe Shockwave Player, AIM 6.0, Avery Wizard 2.1 for Microsoft Office Word 2003, Building Applications with Microsoft Outlook 2000, Canon i850, CC_ccProxyExt, ccCommon, ccPxyCore, CCS Inventory, Cisco Systems VPN Client 4.0.3 (D), Compaq Connections.
- Hardware Information:** Processor: Pentium IV, TotalPhysicalMemory: 10, Monitor: ViewSonic VX911, VideoCard: Intel(R) 8284 Graphics Controller.
- Ticket Details:** Assigned to user: Darrell Trimble, Status: Complete, Completed: Thu 1/17/2008 10:34 AM.
- Original Description and Attachments:** When I have powerpoint, word, outlook and skype open my machine performance is very slow. Can I get more memory installed?

Asset Information - CCS HelpDesk 4.2 links with CCS Network Inventory. When you are working on a ticket, this will allow you to bring up information about the computer or asset involved. Information provided includes:

- Hardware information – Processor, Memory, devices etc.
- Software inventory – including all applications etc.
- Capacity Information – disk, memory etc.
- Hotfix information

Assigned Ticket - Knowledge Base tab

The Knowledge Base tab gives the technician access to information without leaving the ticket. He/She can search the knowledgebase or add information to it right from the ticket.

General | Details | Data | Use Knowledge Base

Knowledge Base Articles

Open KB:

Open KB

Open KB with Adv. Find

Search KB:

Search KB using terms below

Search Terms: ?

Search Results:

Display Send to user

Create KB Article from this ticket

Copy the following to new KB article:

Work Log Description

Attachments Resolution

Create KB Article

New Log Entry

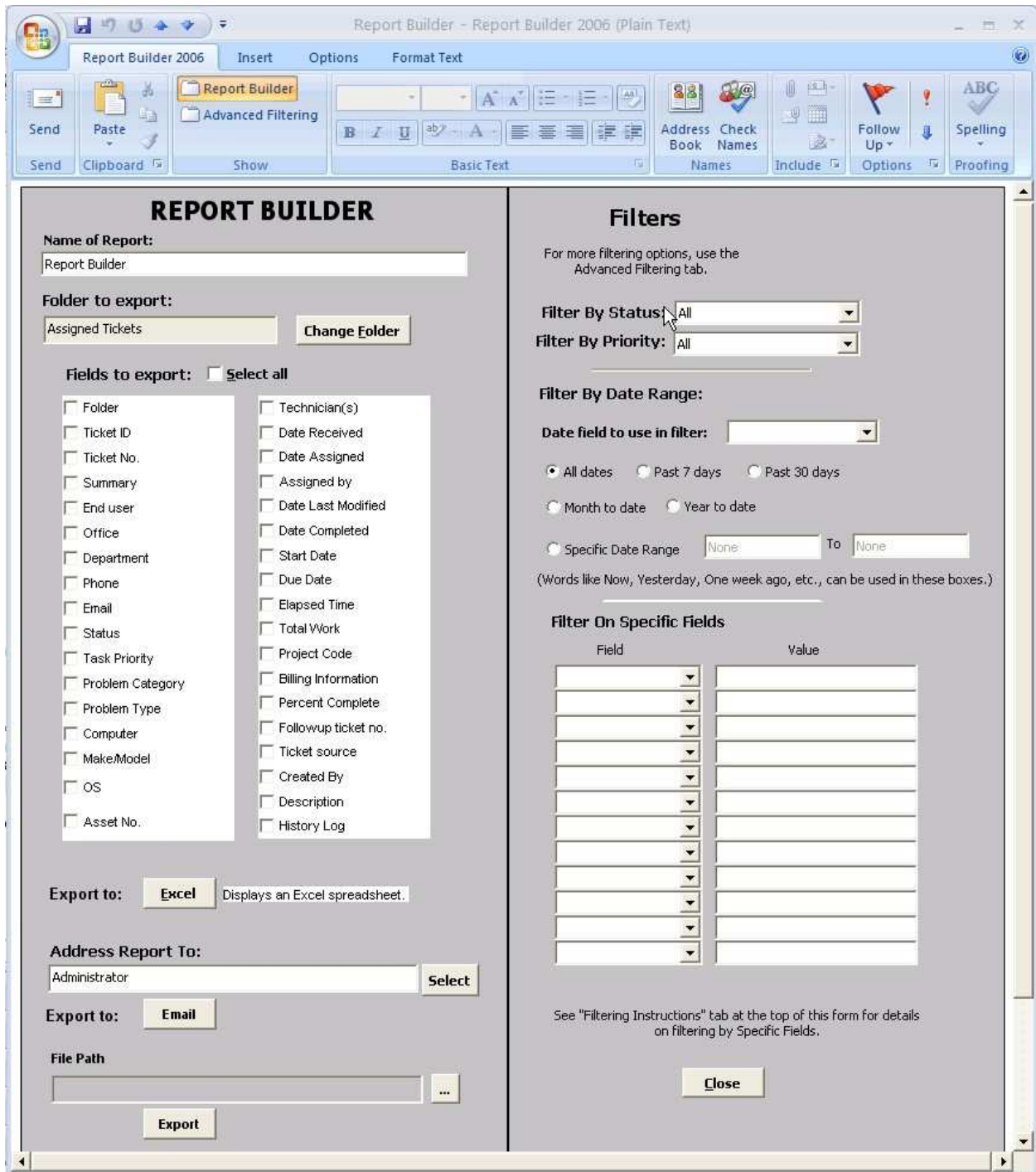
Add as is Add/Send to user Add as [Internal] Add as from: Scott Restivo

Work Log % Complete 0% Current Work 0 h 0 m Total Work 0 h 0 m

- [USER COMMENT] 12/28/2008 10:26:31 PM: Scott Restivo - Ordered from Dell corporate account, ref # 10242752, should arrive in 3 days.
- [USER COMMENT] 12/28/2008 10:22:22 PM: Scott Restivo - reviewing software application requirements
- [SYSTEM] 12/28/2008 10:08:45 PM: TICKET RECEIVED - Approved by Darrell Trimble at 12/28/2008 10:14:00 PM

Resolution Cause: Complete Completed: None

REPORTING




Reporting is done through Reporting Builder. This utility allows you to select and filter ticket data which will be exported to Excel or flat file. Once you have created the filter in Report Builder you can save it for future use.

EXPORT UTILITY

Export to Access or SQL - The new Export Utility pushes the ticket data out to Microsoft Access, SQL or other ODBC -compliant database on a ondemand or scheduled basis. This allows you to use the full power of a relational database to derive reports and statistics on Help Desk activity. We provide the Access database and sample reports and queries, which you can then build and expand upon to precisely meet your Help Desk management needs.

Export Tickets to Database

CCS HelpDesk  **Database**

This utility will export Assigned and Completed Tickets to an Access or SQL database. An Access database with a table named "Tickets" is supplied with CCS HelpDesk for this export. You could use SQL instead, as long as you set up a table in SQL similar to the one in Access. A DSN (Data Source Name) needs to be set up prior to the export so that this utility knows which database to connect with.

Select Assigned Tickets Folder	
Reports	
	DSN ("Data Source Name")
	CCSHD40

Export Tickets to Database

Close